FACILITY CONDITIONS AND SPORTS TOURISM NEEDS ASSESSMENT

PRESENTED TO: CLERMONT COUNTY CONVENTION AND VISITORS BUREAU

DISCOVER CLERMONT

DRAFT REPORT – NOVEMBER 2024

CROSSROADS CONSULTING

CONVERGENCE DESIGN

Report Letter

November 2024

Mr. Jeff Blom, President
Clermont County Convention and Visitors Bureau
410 East Main Street
Batavia, OH 45103

Dear Mr. Blom:

Crossroads Consulting Services, LLC, in conjunction with Convergence Design, has completed its analysis for the Clermont County Convention and Visitors Bureau that assesses existing sports facility conditions as well as the need for improved and/or new sports facilities in Clermont County to increase sports tourism. The report presented herein includes the summary of our analysis.

The information contained in the report reflects analysis of primary and secondary sources, including but not limited to, data obtained from the Clermont County Convention and Visitors Bureau. We have utilized sources that are deemed to be reliable but cannot guarantee their accuracy. All information provided to us by others was not audited or verified and was assumed to be correct. Furthermore, estimates and analysis regarding this project are based on trends and assumptions. We have no obligation, unless subsequently engaged, to update this report or revise this analysis as presented due to events or conditions occurring after the date of this report.

In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by the Clermont County Convention and Visitors Bureau and may not be relied upon by any third party for any purpose including financing.

We have enjoyed working with you on this engagement and look forward to the opportunity to provide you with continued services.

Sincerely,

Draft Document – Subject To Change

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Introduction

Introduction

PROJECT BACKGROUND

Communities and states across the U.S. have recognized the economic and fiscal benefits of developing and operating various public assembly venues. In recent years, many indoor and outdoor sports complexes have been built nationwide, partly due to these facilities' ability to drive economic activity at local businesses and increase tax revenues at both the local and state levels. To maximize resources, communities are increasingly seeking opportunities that better respond to the anticipated long-term needs of their residents and generate overnight visitor demand. Consequently, some communities opt to pursue sports complexes to capitalize on existing assets and enhance market opportunities by targeting a diverse set of demand generators.

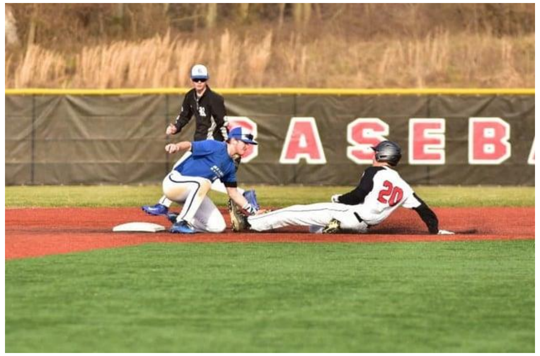
Clermont County ("County") is located along Ohio's southern border, just east of Cincinnati. The County offers a variety of amenities and attractions for residents and visitors alike including an all-cardboard based boat museum in New Richmond, a motorsport country club in Batavia, and a variety of outdoor recreation opportunities provided by parks such as East Fork State Park, Sycamore Park and Community Park.

The Clermont County Convention and Visitors Bureau's ("CVB") mission is to strengthen the community by generating economic growth and vitality through tourism, overnight stays and encouraging visitor spending in the local economy. The professional destination marketing and sales organization serves as a broker to an official point of contact for convention and meeting planners, tour operators and visitor and sports organizations. The CVB has hosted major sporting events such as the U.S. Rowing National Championships.

PURPOSE OF THE STUDY

One of the CVB's objectives is to increase sports-related tourism in the County. Consistent with this objective, the project team of Crossroads Consulting Services, LLC ("Crossroads Consulting" or "Crossroads") and Convergence Design ("Convergence") were engaged to assess the existing supply of sports facilities in the County and identify improvements and/or new facilities that are needed to optimize sports tourism.

The conclusions outlined in this study are factors that the CVB should consider in its strategic planning efforts. The research and analysis contained in this report are intended to allow the CVB to draw informed conclusions regarding increasing sports tourism through potential improvements to existing sports facilities and/or the development of new sports facilities.



Introduction (cont'd)

WORK PLAN

Research tasks completed as part of this study effort included, but were not limited to, the following.

- Conducted a kickoff meeting with the appropriate CVB representatives to discuss key issues related to the study; review the study scope and objectives; review existing data related to the project; and tour existing sports facilities.
- Conducted market outreach with area stakeholders to obtain their perspectives on the strengths and challenges associated with existing facilities as well as potential event programming opportunities associated with enhanced and/or new sports facilities.
- Profiled market attributes including trends and projections in population, age distribution and income; employment base; transportation access, hotel statistics; local/regional sports participation trends, climate/seasonality; and existing/planned amenities and/or planned development projects that could impact future demand for enhanced and/or new sports facilities.
- Provided an inventory of existing and planned sports facilities in the County and in the region.
- Analyzed data from a select number of competitive/comparable sports facilities including management approach, physical building program elements and related amenities, supporting infrastructure, and general operating characteristics.
- Identified market-driven changes to supply in terms of recommended improvements and upgrades at existing sports facilities in the County and/or construction of new sports venues to further enhance sport tourism efforts.
- Prepared a relative ranking of market potential by facility type.
- Outlined preliminary building program recommendations in terms of general space requirements for enhanced/or new sports facilities.
- Developed concept site plans and order-of-magnitude estimates of probable construction and project costs.
- Identified potential finance alternatives and funding sources utilized by other similar sports facilities in other markets.
- Estimated the economic and fiscal impacts that could potential be generated from enhanced/new sports facilities.

Local Market Overview

Local Market Overview

Market characteristics where any enhanced/new sports facilities would operate are important to evaluate and understand. Many variables, including demographic and economic conditions, as well as local area offerings and destination appeal, are likely to impact a facility's competitive positioning in the market.

To assist the County in assessing the merits improving and/or building new sports facilities, this section profiles:

- Demographic and socioeconomic data
- Tapestry segmentation
- Area employment
- Transportation access
- Lodging statistics
- Area amenities
- Climate characteristics

Demographic and Socioeconomic Data

Demographic and socioeconomic trends are pertinent to assessing demand for participant and spectator-oriented sports activities for several reasons.

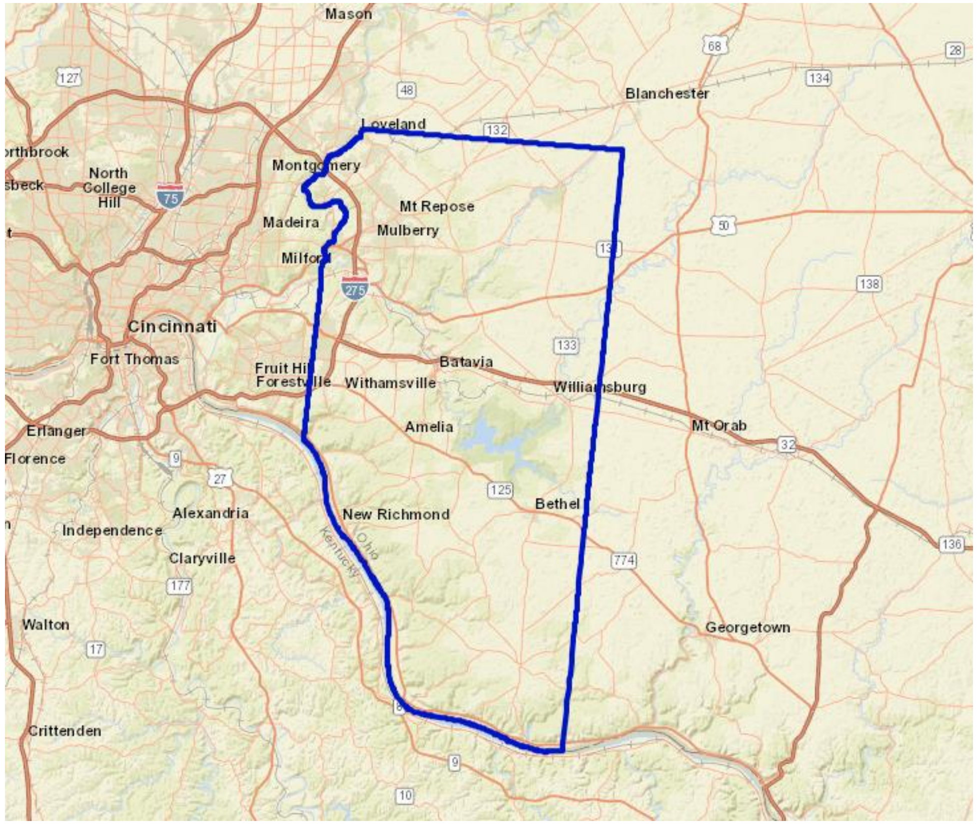
Depending on the scope of the event, sports facilities can draw area residents and out-of-town visitors. Key criteria considered by sporting event organizers in choosing where to stage events typically includes location, market characteristics, and facility offerings. Additionally, the existence of area youth and amateur sports clubs that actively participate in tournaments as well as other factors such as population, age distribution and income characteristics can be important when selecting markets to host their events.

Typically, recreational league games, practices, and other related sports activity draw people from the local area. Industry research suggests larger tournaments are likely to attract participants and attendees from greater distances, with most drive-in attendees expected to originate within a 5-hour drive time. As such, this section profiles demographic and socioeconomic data including population, age and income characteristics for multiple areas including the County and a 5-hour drive time from Batavia, which was deemed a relatively central location in the County for purposes of this analysis. For comparative purposes, demographic data is also shown for the State of Ohio and the U.S.

Demographic and Socioeconomic Data (cont'd)

The maps below illustrate the geographic footprint of the County and 5-hour drive time. Clermont County is in southwest Ohio, east of Cincinnati. The 5-hour drive time captures a broad geographic area including markets such as Louisville, Kentucky; Indianapolis, Indiana; Charleston, West Virginia; Detroit, MI; and Nashville and Knoxville, Tennessee; among others.

Map of the County



Source: Esri

Map of 5-Hour Drive Time

Source: Esri.

Demographic and Socioeconomic Data (cont'd)

Population

Population serves as a base from which sports facilities draw participation, attendance, and other forms of support. As shown in the table below, the population within the County in 2024 is 213,264. The population within a 5-hour drive time is significantly greater at approximately 38.8 million. These profiled areas are expected to grow at a slower rate in comparison to the U.S. from 2024 through 2029.

Total Population				
Population Summary	Clermont County	5-Hour Drive Time	State of Ohio	U.S.
2010 Total Population	197,389	37,485,709	11,536,504	308,745,538
2020 Total Population	208,601	38,553,870	11,799,448	331,449,281
2024 Total Population	213,264	38,818,732	11,827,635	338,440,954
2029 Total Population	216,010	38,988,084	11,838,305	344,873,411
2010-2020 Annual Rate	0.57%	0.28%	0.23%	0.74%
2020-2024 Annual Rate	0.56%	0.17%	0.06%	0.53%
2024-2029 Annual Growth Rate (Projected)	0.26%	0.09%	0.02%	0.38%

Source: Esri

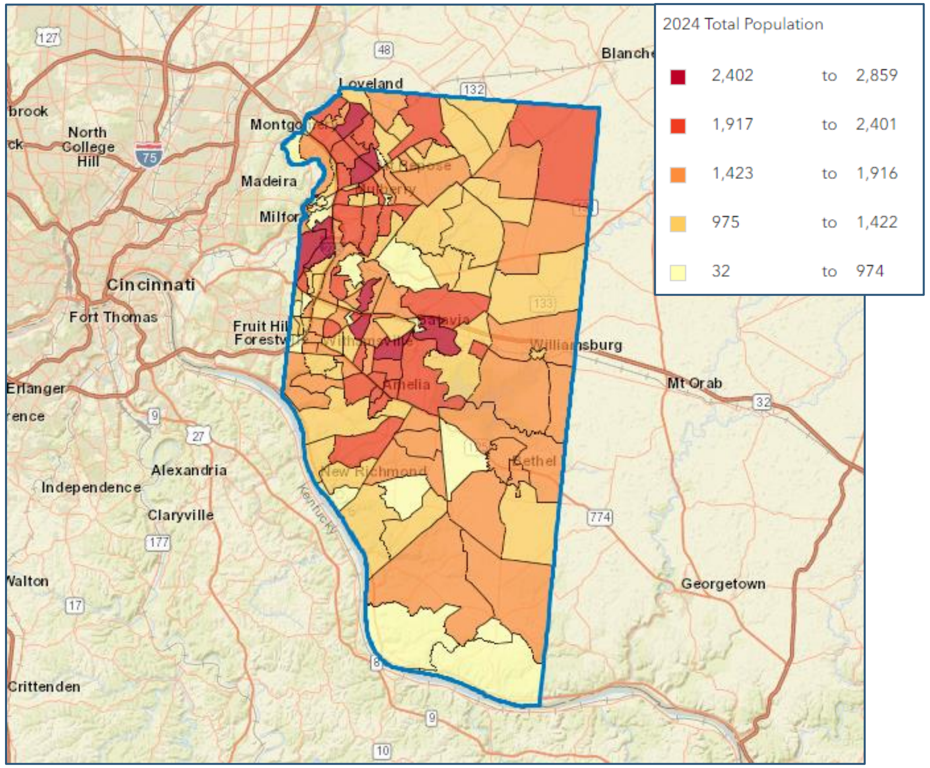
Source: CVB.

Demographic and Socioeconomic Data (cont'd)

Population (cont'd)

For informational purposes, the following maps illustrate the population density within the County and 5-hour drive time.

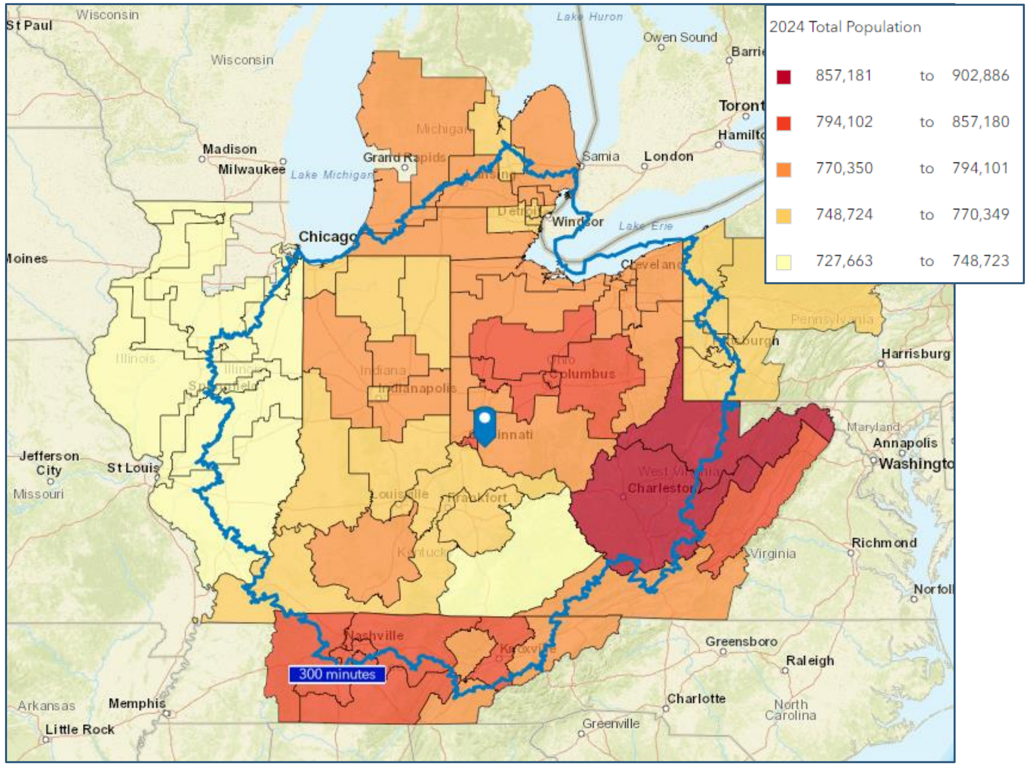
Total Population -Clermont County



Source: Esri.

Clermont County's highest population is located centrally and along the northwest border, near Milford.

Total Population - 5-Hour Drive Time



Source: Esri.

The 5-hour drive time encompasses several major markets with a high population density.

Demographic and Socioeconomic Data (cont'd)

Age Distribution

The distribution of the population by age is useful to understand as different events are targeted to participants within specific age groups. Individuals under the age of 18 are a popular target market for participants in sports tournaments/ competitions. As shown below, the population under the age of 18 within the County and the profiled drive-time is consistent with that of the State and U.S.

Age Distribution				
2024 Population by Age	Clermont County	5-Hour Drive Time	State of Ohio	U.S.
Age 0-4	5.6%	5.6%	5.6%	5.5%
Age 5-9	6.2%	5.9%	5.9%	5.8%
Age 10 - 14	6.4%	6.0%	6.0%	6.0%
Age 15 - 24	12.2%	13.2%	13.1%	13.2%
Age 25 - 34	11.9%	13.0%	12.8%	13.5%
Age 35 - 44	12.8%	12.6%	12.5%	13.3%
Age 45 - 54	12.2%	12.0%	11.8%	12.1%
Age 55 - 64	13.4%	12.7%	12.8%	12.3%
Age 65 - 74	11.5%	11.0%	11.2%	10.4%
Age 75 - 84	6.0%	5.9%	6.0%	5.7%
Age 85+	1.8%	2.1%	2.2%	2.0%
Age 18+	78.0%	78.8%	78.8%	79.0%
Age < 18	22.0%	21.2%	21.2%	21.0%
2024 Median Age	41.1	39.9	40.2	39.3

Source: Esri

Income Distribution

Household income levels are an indicator of spending potential and the ability for households to purchase goods and services including sporting event participation or attendance. The 2024 median household income in the County is $82,460 which is higher than that for the three profiled geographic areas. The 2024 median household income within the 5-hour drive time ($68,655) is consistent with the State but lower than the U.S. The projected median annual household income growth rates are relatively similar among all profiled markets.

Household Income Distribution				
2024 Household Income Distribution	Clermont County	5-Hour Drive Time	State of Ohio	U.S.
Less than $15,000	5.7%	9.9%	9.7%	8.6%
$15,000 to $24,999	5.2%	7.1%	6.9%	6.3%
$25,000 to $34,999	8.0%	7.6%	7.6%	6.7%
$35,000 to $49,999	7.9%	11.5%	11.4%	10.1%
$50,000 to $74,999	17.7%	17.1%	17.4%	15.7%
$75,000 to $99,999	15.1%	13.2%	13.3%	12.8%
$100,000 to $149,999	18.9%	17.0%	16.9%	17.6%
$150,000 to $199,999	11.3%	8.1%	8.2%	9.5%
$200,000+	10.2%	8.4%	8.5%	12.6%
2024 Median Household Income	$82,460	$68,655	$69,192	$79,068
2029 Median Household Income (Projected)	$94,325	$79,996	$80,521	$91,442
2024-2029 Annual Growth Rate (Projected)	2.9%	3.3%	3.3%	3.1%
2024 Average Household Income	$109,700	$96,342	$97,114	$113,185
2029 Average Household Income (Projected)	$126,500	$111,582	$112,947	$130,581
2024-2029 Annual Growth Rate (Projected)	3.1%	3.2%	3.3%	3.1%

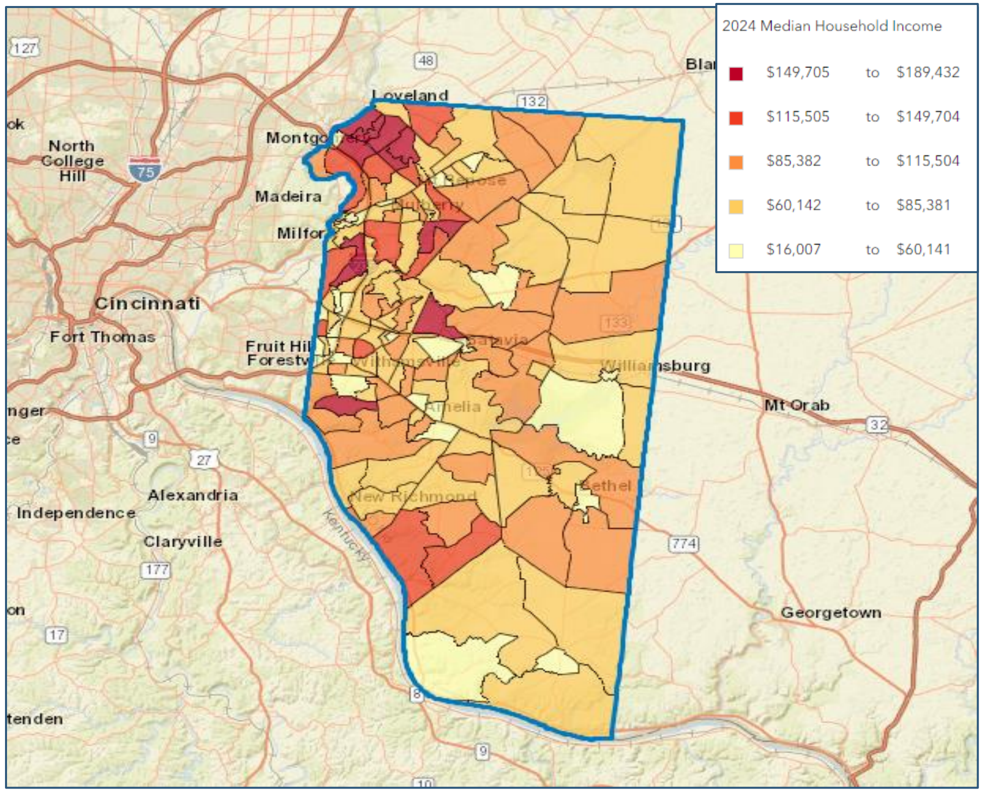
Source: Esri

Demographic and Socioeconomic Data (cont'd)

Income Distribution (cont'd)

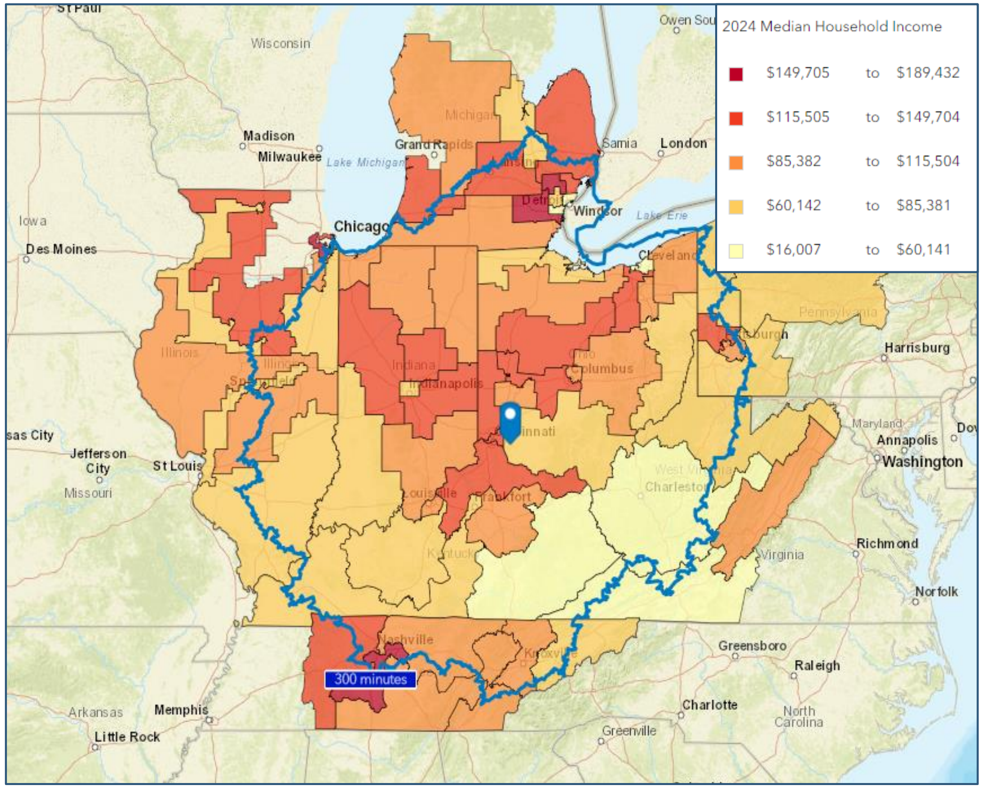
For informational purposes, the following maps illustrate the median household income within the County and 5-hour drive time. The northwest area of the County has higher median household incomes in comparison to other areas in the County. Within the 5-hour drive time there are several areas with high median household incomes, particularly to the north of Batavia.

2024 Median Household Income - Clermont County



Source: Esri.

2024 Median Household Income - 5-Hour Drive Time



Source: Esri.

Tapestry Segmentation

According to Esri, tapestry segmentation classifies neighborhoods into 67 segments on both demographics and socioeconomic attributes. They summarize lifestyle choices as well as what people buy and how people spend free time. The top tapestry segments for the County include Salt of the Earth, Old and Newcomers, and Middleburg. The following provides a brief description of each of these three tapestry segments as defined by Esri.

Salt of the Earth (12.7% of 2023 Households): Salt of the Earth residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary but seek face-to-face contact in their routine activities.

Old and Newcomers (8.8% of 2023 Households): This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. Old and Newcomers is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support charity causes and are environmentally conscious. Age is not always obvious from their choices.

Middleburg (7.7% of 2023 Households): Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, as the housing boom spread beyond large metropolitan cities. Residents are traditional, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

Note: Metrics shown above reflect that of the U.S.

Area Employment

The composition of an area's employment by industry can be a factor in attracting certain events and/or seeking advertising and sponsorship opportunities at enhanced/new sports facilities. A balanced distribution of the workforce is beneficial as to not create an over reliance on any single industry segment. Additionally, a diverse local economy is better insulated from economic downturns.

In 2024, there were 108,553 total jobs in the County which were primarily in the Services industry, followed by Manufacturing and Retail Trade.

Clermont County 2024 Employed Population 16+ by Industry		
Industry	**Total Jobs**	**% of Total**
Services	50,043	46.1%
Manufacturing	15,415	14.2%
Retail Trade	13,352	12.3%
Construction	8,793	8.1%
Finance/Insurance/Real Estate	8,250	7.6%
Transportation/Utilities	5,862	5.4%
Public Administration	3,365	3.1%
Wholesale Trade	1,845	1.7%
Information	1,411	1.3%
Agriculture/Mining	217	0.2%
Total	**108,553**	**100%**

Source: Esri.

Based on the most recent information available from Clermont County at the time of this report, Total Quality Logistics is the largest employer in the County with 2,350 employees, followed by Clermont County, American Modern Insurance Group, and Siemens Digital Industries Software.

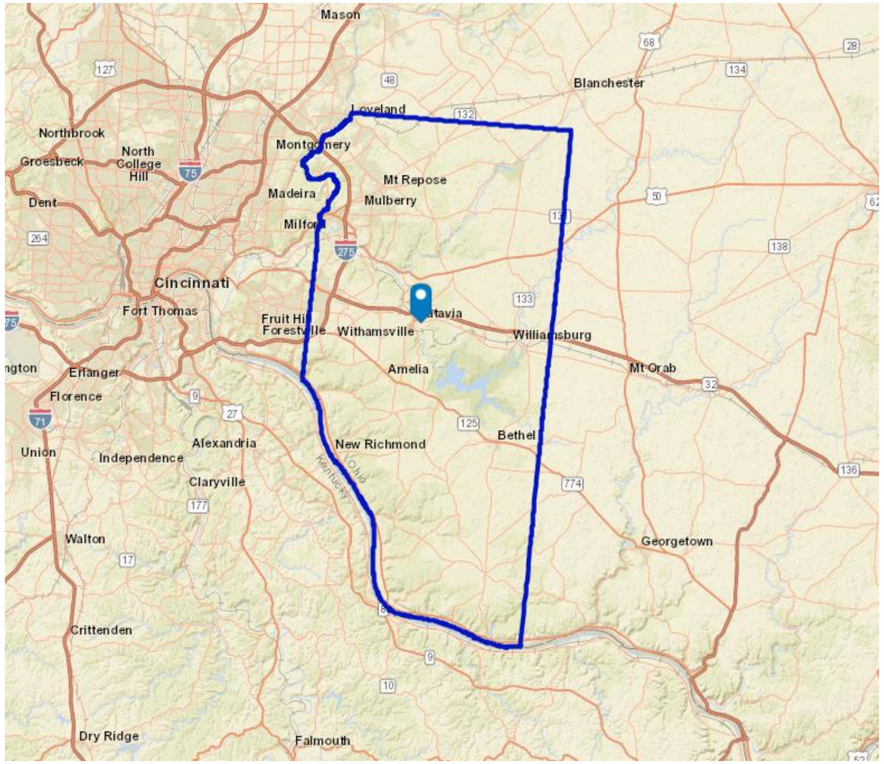
Clermont County - Principal Employers		
Employer	**Employees**	**% of Total**
Total Quality Logistics	2,350	23%
Clermont County	1,351	13%
American Modern Insurance Group	1,061	10%
Siemens Digital Industries Software	1,015	10%
West Clermont Local School District	941	9%
Mercy Health- Clermont Hospital	815	8%
Milacron	800	8%
Milford Exempted Village District School	790	8%
L3 Harris Fuzing and Ordnance Systems	685	7%
Tata Consultancy Services	536	5%
Total	**10,344**	**100%**

Note: Sorted in descending order by number of employees.

Source: Clermont County 2023 Comprehensive Annual Financial Report.

Transportation Access

The ease of access to a venue for attendees is a consideration that event planners and organizers consider when selecting a destination to host their events. From a regional perspective, there are several major interstates that connect to I-275, such as I-70, I-71, I-74, and I-75. I-275 encircles the Cincinnati metropolitan area and runs through the western portion of the County. Several highways provide access throughout the County including 28, 32, 50, 125, 132 and 133.



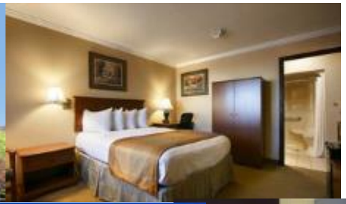
Proximate and convenient air access can be important in serving the needs of sporting event organizers and participants, particularly for national events. The area is primarily serviced by Cincinnati Northern Kentucky International Airport ("CVG") which is about 30 miles from Batavia. In 2023, CVG had approximately 4.3 million enplanements. The Federal Aviation Administration (FAA) defines enplanements as domestic, territorial, and international passengers who boarded an aircraft in a scheduled and non-scheduled service of aircraft. Nearly 80 miles to the north is the Dayton International Airport ("DAY") which recorded nearly 0.6 million enplanements in 2023.

Lodging Statistics

Hotel accommodations in terms of supply, range of offerings, and proximity to sports facilities can play an important role in attracting sporting events that draw overnight attendees. Research indicates that participants/spectators tend to travel further and stay longer when their choice of hotel property is readily available.

As shown in the adjacent table, there are more than 1,400 hotel rooms in the County, excluding smaller properties such as bed and breakfasts. Most of these hotels are located along I-275. These properties primarily consist of limited-service chain-affiliated properties. Limited-service hotels are generally defined as those that offer certain services and amenities such as a business center, fitness room, swimming pools, etc. Full-service hotels generally offer all the services of a limited-service hotel as well as full restaurants, luxury rooms, laundry, shuttle services, spas, room service, etc.

Although outside the County, there is a significant supply of hotels in Cincinnati that could also serve overnight visitors.



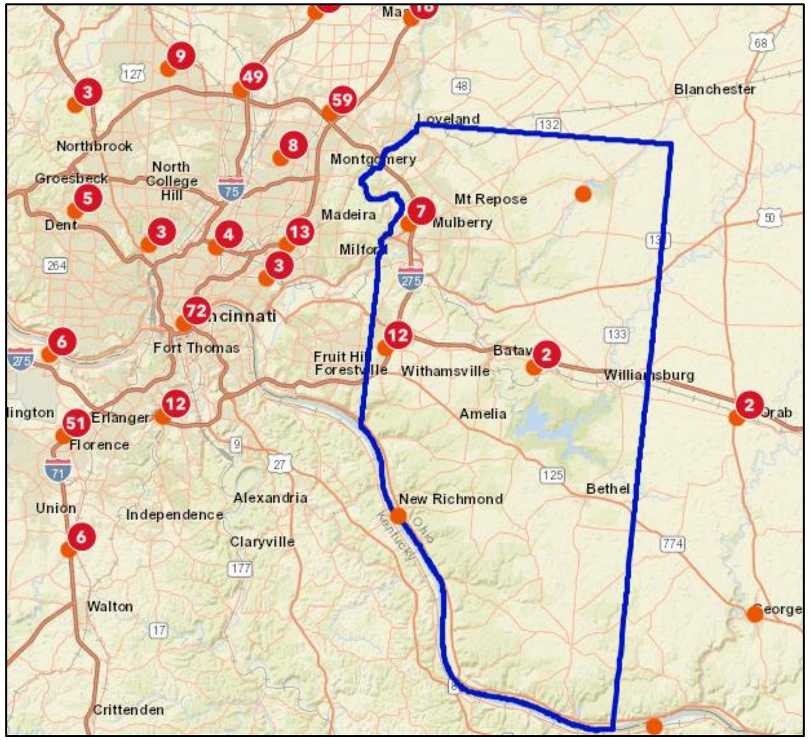
Hotel Supply in Clermont County

Property	Number of Rooms
Holiday Inn & Suites Cincinnati - Eastgate	212
Hampton Inn & Suites Cincinnati - Eastgate	120
Motel Beechmont	110
Red Roof Inn	104
Tru by Hilton Milford Cincinnati	100
Best Western Clermont	96
Staybridge Suites Cincinnati East Milford	92
Home2 Suites by Hilton Cincinnati - Eastgate	86
Hilton Garden Inn Cincinnati Northeast	84
Holiday Inn Express & Suites Milford	79
Fairfield Inn & Suites	78
Homewood Suites by Hilton Cincinnati-Milford	76
Days Inn Cincinnati East	75
Comfort Inn & Suites - Eastgate	72
Days Inn by Wyndham Batavia	55
Total	**1,439**

Note: Sorted in descending order by number of rooms.

Source: Facility Website, Smith Travel Research.

Map of Hotel Properties in Clermont County



Notes: The number in the circles reflects the number of hotels in that area. Map includes several hotels/motels that are not included in the adjacent table given their limited number of rooms.

Source: Esri.

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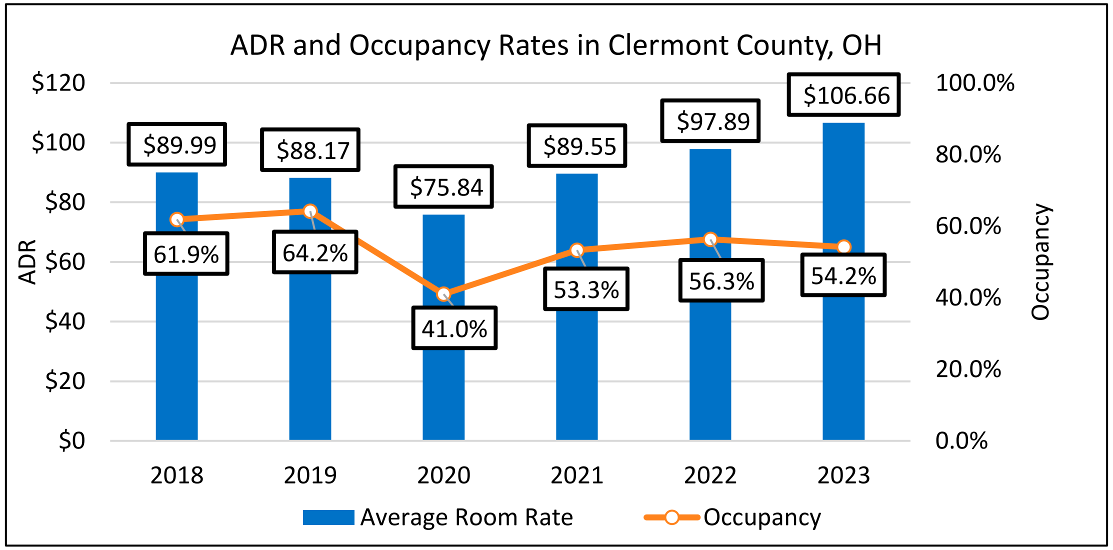
Lodging Statistics (cont'd)

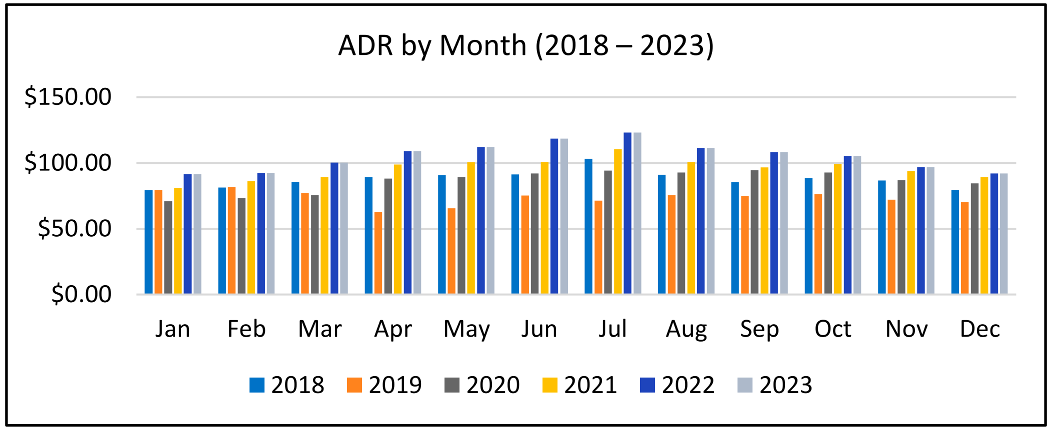
The graph below illustrates the annual trend in average daily rate ("ADR") and occupancy rates at hotels in the County from 2018 through 2023. ADR was consistent in 2018 and 2019, before experiencing a significant decline in 2020 due to the COVID-19 pandemic. ADR rebounded in 2021 and was higher than pre-pandemic levels in 2022 at nearly $98. In 2023, ADR continued to climb to nearly $107.

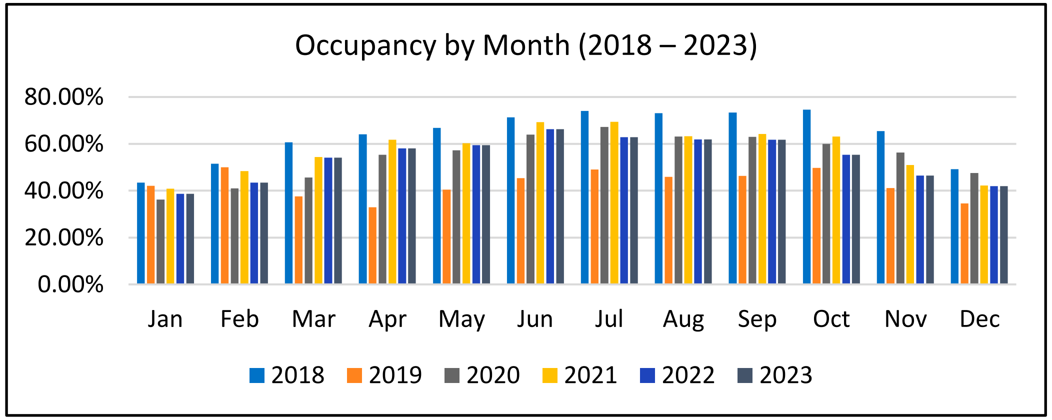
From 2018 to 2019 there was a slight increase in occupancy by 2.3% to 64.2%, before it was drastically impacted by COVID-19 in 2020. As with ADR, occupancy rebounded; however, it remained below pre-pandemic levels and was approximately 54% in 2023.



Source: Smith Travel Research.

The graphs below illustrate the annual monthly trends in ADR and occupancy rates for hotels in the County from 2018 through 2023. As shown, ADR and occupancy are generally highest from May through September, which are generally warmer months that are conducive to outdoor activities.





Source: Smith Travel Research.

Area Amenities

The availability of retail outlets, dining options, and entertainment/attractions is a critical aspect that event organizers consider when choosing a host destination. Attendees often seek nearby amenities during breaks and/or after event-related activities.

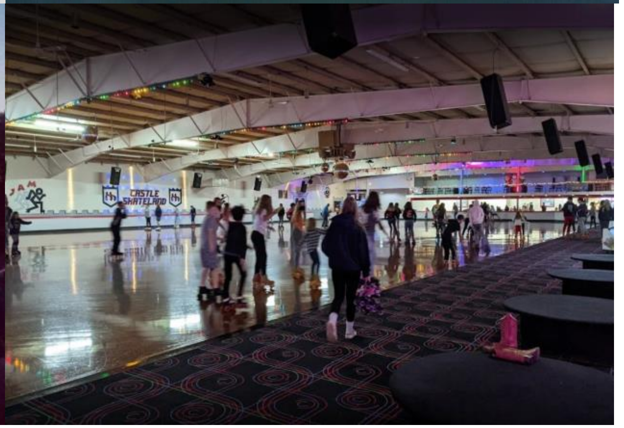
The County has many historical, cultural and entertainment-based attractions appealing to visitors. There is a wide variety of indoor & outdoor recreational options, including golf courses, trails for hiking and biking, historic sites, and shops/boutiques.

Several well-known attractions/amenities in the County include:

- East Fork State Park
- Cincinnati Nature Center
- Scene75 Entertainment Center
- Stonelick State Park
- Starlite Drive-In Theatre
- Cardboard Boat Museum
- River Dogs Paddlesports
- Tri-State Warbird Museum
- Castle Skateland

Although outside of the County, Cincinnati offers a wide range of amenities and attractions such as Cincinnati Zoo and Botanical Garden, Cincinnati Art Museum, and Great American Ball Park, which is home of the Cincinnati Reds.

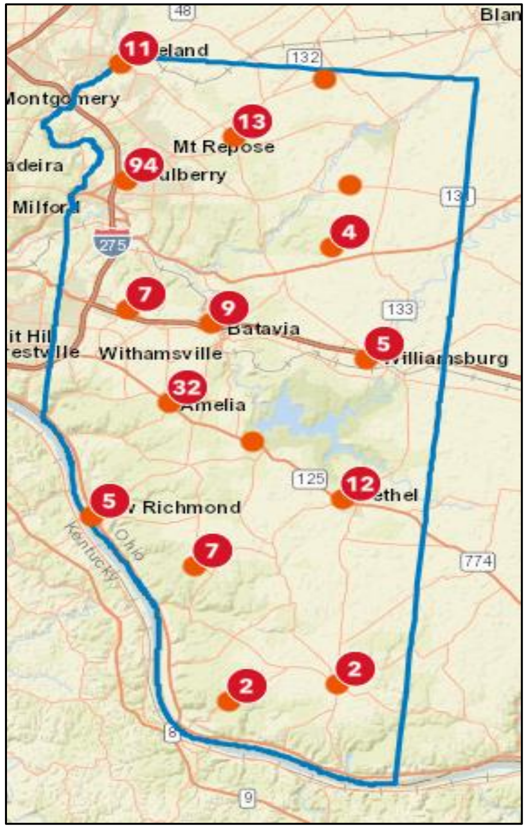


Area Amenities (cont'd)

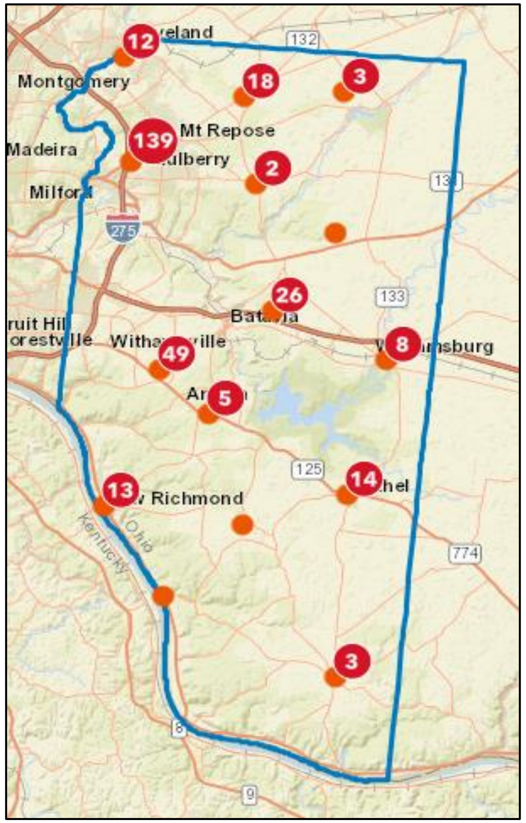
The maps below depict the concentration of retail, dining and recreation/entertainment establishments within the County. While the supply of these establishments is spread out throughout the County, a large portion of the supply is located in the north, specifically near Milford and I-275.

Clermont County
Retail Establishments



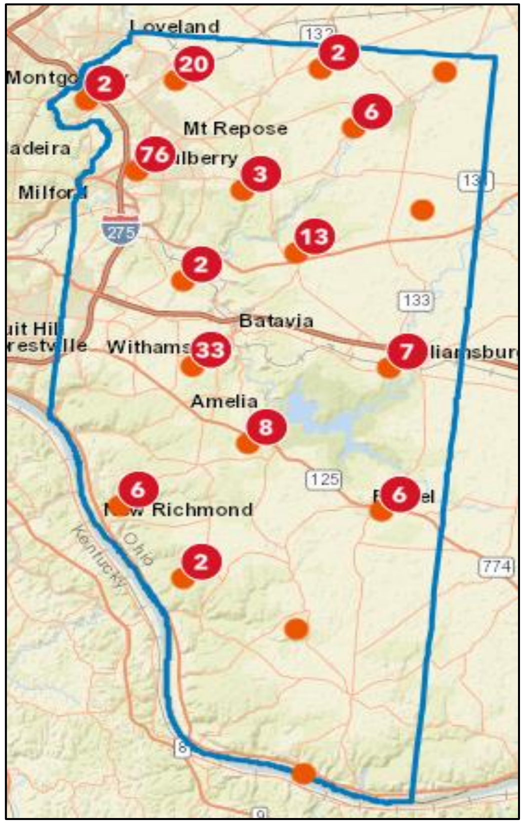
Source: Esri.

Clermont County
Dining Establishments



Source: Esri.

Clermont County Recreation &
Entertainment Establishments

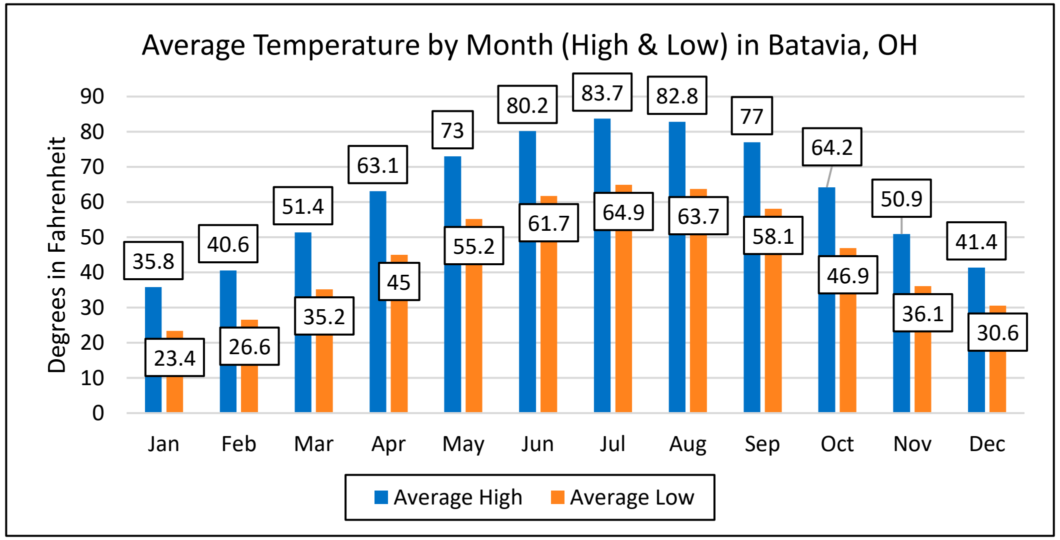


Source: Esri.

Climate Characteristics

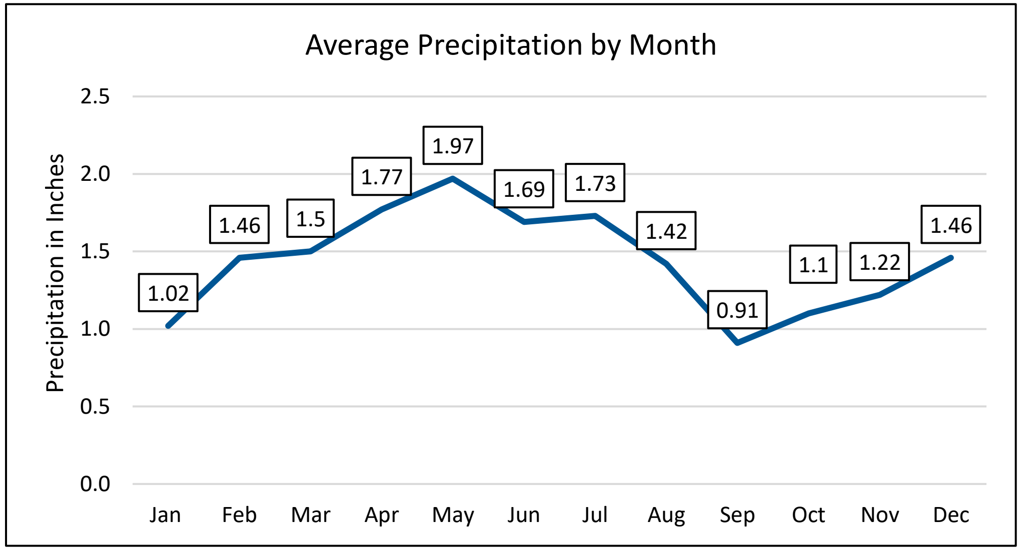
Sports event organizers, particularly those involved with outdoor activities, also consider an area's climate when selecting event locations and venues as it can impact playing surface as well as overall comfortability.

The chart below illustrates the average high and low temperature by month for Batavia. As shown, the warmest months are June through August, and the coolest months are November through March when the average high is lower than 60 degrees. Overall, temperatures are most favorable from May through September.



Source: Weather Atlas.

Months with high precipitation could negatively impact outdoor sporting events, particularly on natural grass fields, which are more susceptible to weather conditions than turf fields. On average, precipitation in Batavia ranges from 0.91 to 1.97 inches per month, with the highest precipitation occurring from February through August and December.



Source: Weather Atlas.

Supply of Local and Regional Sports Facilities

The extent that existing sports facilities meet the needs of target markets is important to consider when assessing demand for improvements and/or new facilities. Facility size, program elements, configuration, quality/condition, age, market focus and date availability are factors that impact the ability for local sports facilities to host events that generate sports tourism. Further, the supply of competitive facilities in the region can have an impact on the ability of facilities in the County to attract sports tourism events.

While this section provides an overview of select local and regional sports facilities, it is not meant to be an all-inclusive inventory of facilities. Certain facilities, such as those associated with schools, are not profiled given their primary market focus which is to accommodate the internal needs of their student-athletes and school programs.

Supply of Local and Regional Sports Facilities (cont'd)

Local Outdoor Sports Facilities

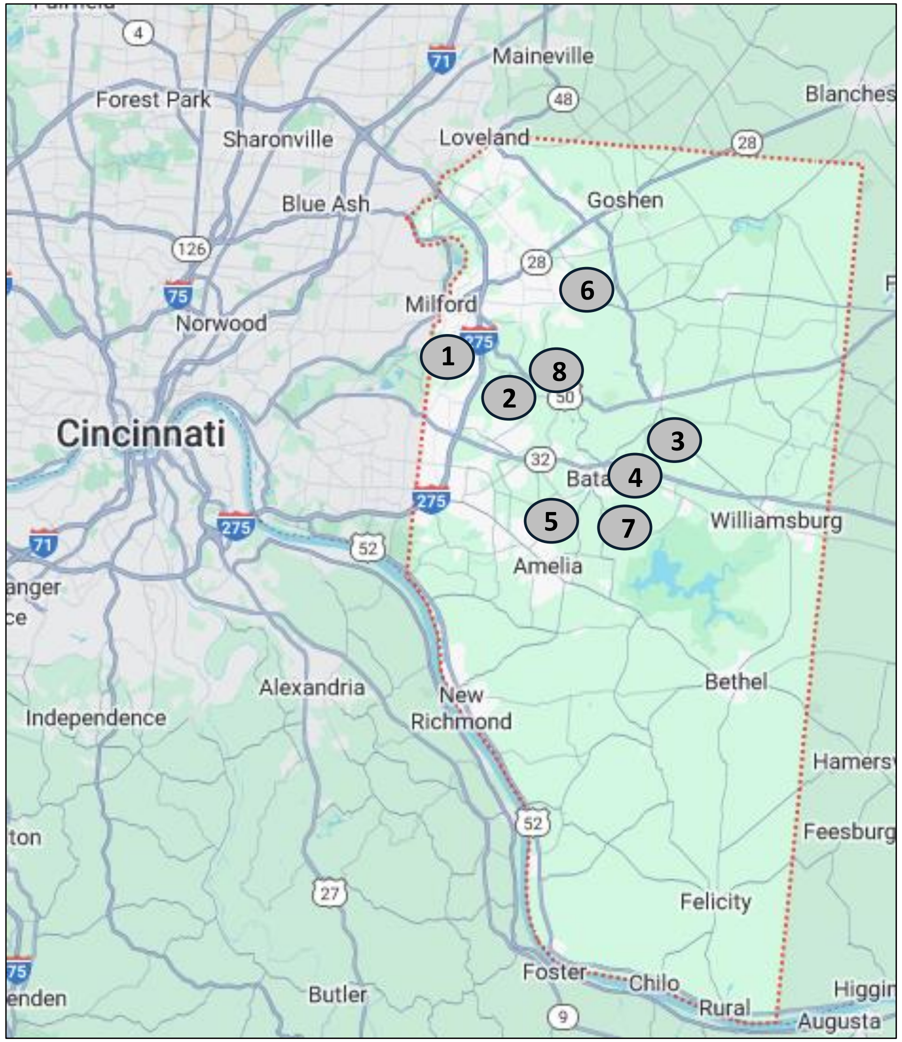
The following table profiles existing outdoor sports facilities in the County. These facilities offer a total of 112 fields: 57 outdoor rectangular fields and 55 outdoor diamond fields.

Generally, outdoor tournaments that generate significant tourism require at least six (6) fields of the same type, with larger tournaments requiring more. Five (5) facilities in the County have six (6) or more rectangular fields while only three (3) facilities have six (6) or more diamond fields. The largest outdoor sports complex in the County is Finley Ray Park, with a total of 37 fields: 19 rectangular and 18 diamond. Tealtown Ballpark is the second largest, offering 17 total fields, all of which are diamonds. Olympic Fields has 13 rectangular fields; however, a portion of the site may be sold for redevelopment. Mercy Health Training Center, which is the official practice facility for FC Cincinnati, currently has three full-sized soccer fields but there are plans to develop additional fields.

In addition to these facilities, there are several other sports facilities just outside the borders of the County, such as Flash Baseball Complex which has 10 diamond fields.

Summary of Outdoor Sports Facilities in Clermont County - Building Program Elements				
	Outdoor Fields			
Facility	Outdoor Rectangular Fields	Outdoor Diamond Fields	Total	Key To Adjacent Map
Finley Ray Park	19	18	37	1
Tealtown Ballpark		17	17	2
Batavia Community Recreation League Fields	6	9	15	3
Olympic Fields	13		13	4
Batavia Township Sports Complex	8	4	12	5
Miami Meadows Park	8	4	12	6
Midland Baseball Complex		3	3	7
Mercy Health Training Center	3		3	8
Total	**57**	**55**	**112**	
Average	**10**	**9**	**14**	

Sources: Individual Facilities, Facility Website, Secondary Research.



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Supply of Local and Regional Sports Facilities (cont'd)

Local Indoor Sports Facilities

Excluding school-related facilities, there are four facilities in the County that offer indoor space. Generally indoor facilities require a minimum of four (4) courts to host sports-tourism activities, with many tournaments requiring six (6) or more. Elite Athletics has seven (7) basketball courts or volleyball courts, Nothin' But Net Sports Complex has five (5) basketball or volleyball courts, and Positively Charged Volleyball offers four (4) volleyball courts.

Summary of Indoor Sports Facilities in Clermont County - Building Program Elements

	Indoor					
Facility	Total SF	Indoor Basketball Courts	Indoor Volleyball Courts	Indoor Turf Areas	Track	Key To Adjacent Map
Elite Athletics Sports Complex	64,000	7	7+	Yes	No	1
Cincy Sports Nation	65,000			Yes	No	2
Nothin' But Net Sports Complex	n/a	5	5+	No	No	3
Positively Charged Volleyball	21,000		4	No	No	4
Total	**150,000**	**12**	**16**			
Average	**50,000**	**6**	**5**			

Sources: Individual Facilities, Facility Website, Secondary Research.

Local Ice Facilities

There are no existing tournament quality ice facilities in the County; however, secondary sources report that a private developer is planning a new ice facility in the County, which could consist of multiple ice sheets as well as volleyball courts.

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Supply of Local and Regional Sports Facilities (cont'd)

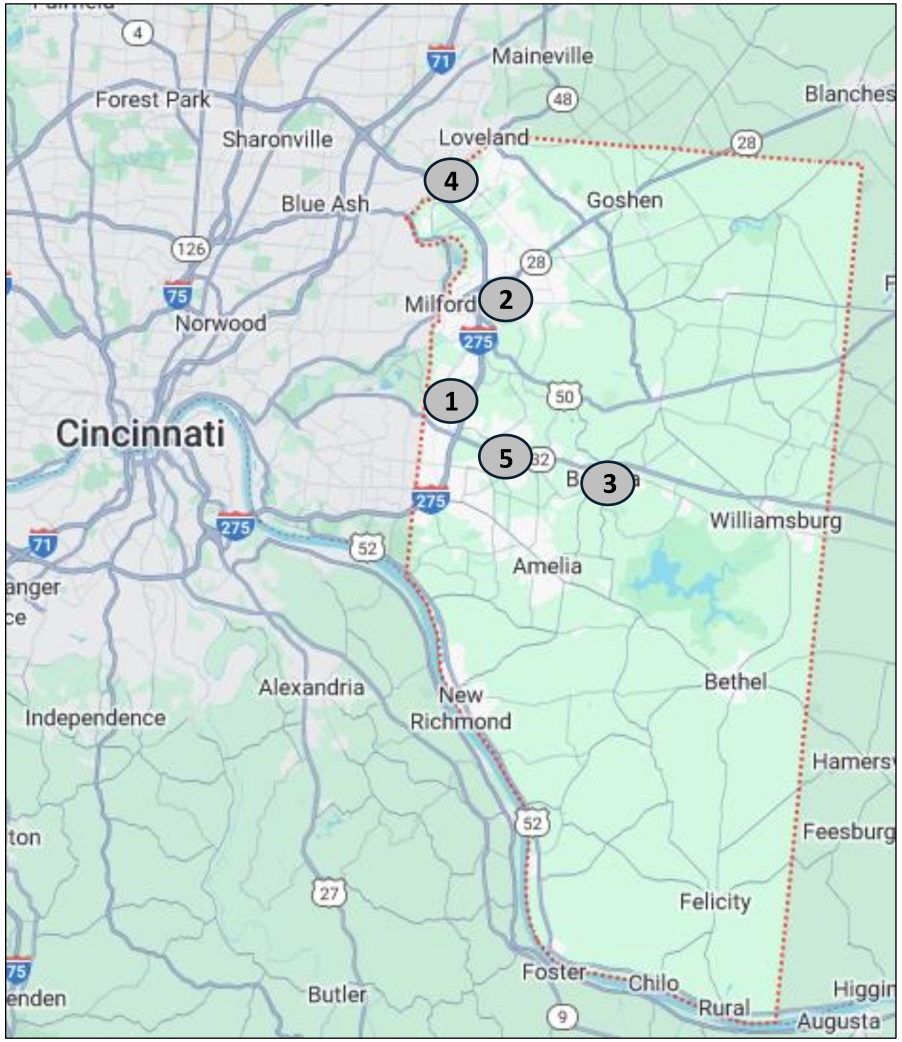
Local Aquatics Facilities

There are several aquatics facilities in the County including Terrace Park Swim & Tennis Club, Miami Hills Swim & Tennis Club, Batavia Swim Club, Normandy Swim and Tennis Club, and Clermont Family YMCA. Terrace Park Swim & Tennis Club has three (3) pools; Normandy Swim and Tennis Club, Batavia Swim Club, and Miami Hills Swim & Tennis club each have two (2) pools, and Clermont Family YMCA has one (1). All of these facilities are membership-based. Coney Island in Cincinnati previously offered one of the largest recirculating pools in North America; however, this facility closed in late 2023.

Summary of Aquatics Facilities in Clermont County

Facility	Number of Pools	Key To Adjacent Map
Terrace Park Swim & Tennis Club	3	1
Miami Hills Swim & Tennis Club	2	2
Batavia Swim Club	2	3
Normandy Swim and Tennis Club	2	4
Clermont Family YMCA	1	5
Total	**10**	
Average	**2**	

Source: Facility Websites.



Other Local Facilities

Although not shown as they do not offer outdoor fields or indoor competition space, other sites in the County that host athletic events include East Fork State Park, Valley View Foundation, multiple golf courses, etc. East Fork State Park has been home to the U.S. Rowing Championships for several years, as well as other large rowing events.

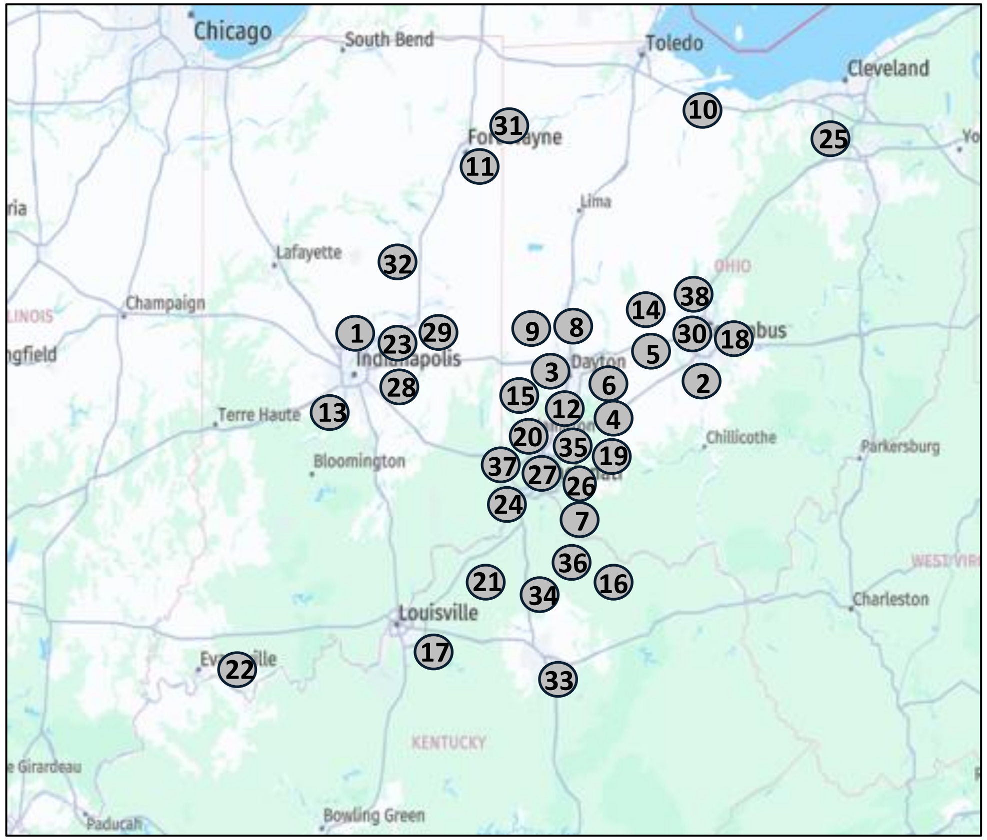
Supply of Local and Regional Sports Facilities (cont'd)

Regional Outdoor Sports Facilities

The following table profiles existing regional outdoor facilities with six or more fields of the same type. There is a large supply of outdoor sports facilities in the region capable of hosting sports tourism activity which offer an average of 10 diamond fields and 12 rectangular fields. Most of the profiled facilities are located to the west of Clermont County in and around Cincinnati and Indianapolis.

Supply of Regional Outdoor Facilities								
			Outdoor Fields					
Facility	City	State	Diamonds	Lighted	Rectangular	Lighted	Total	Key to Adjacent Map
Grand Park Sports Campus	Westfield	IN	26	Yes	31	Yes	57	1
Lou Berliner Sports Park	Columbus	OH	31	Yes			31	2
Joyce Park	Hamilton	OH	9	Yes	19	No	28	3
Voice of America Athletic Complex	West Chester	OH			25	Yes	25	4
Darree Fields	Dublin	OH	7	Yes	18	Yes	25	5
Warren County Sports Park	Lebanon	OH	6	Yes	18	Yes	24	6
Clear Creek Park	Cincinnati	OH			23	No	23	7
Kyle Park	Tipp City	OH	12	Yes	10	No	22	8
Vandalia Sports Complex	Vandalia	OH	11	No	10	No	21	9
Sports Force Park at Cedar Point Sports Center	Sandusky	OH	12	Yes	8	Yes	20	10
The Plex North	Fort Wayne	IN			19	No	19	11
Lebanon Sports Complex	Lebanon	OH			18	No	18	12
Al and Jan Barker Sports Complex	Plainfield	IN	5	No	13	No	18	13
Spindler Road Park	Hilliard	OH			18	No	18	14
Miami Whitewater Soccer Complex	Cleves	OH			16	Yes	16	15
Pendery Sports Park	Melbourne	KY	8	Yes	6	No	14	16
A.B. Sawyer Park	Louisville	KY	12	Yes	2	Yes	14	17
Kilbourne Run Sports Park	Columbus	OH			14	No	14	18
Blue Ash Sports Center	Cincinnati	OH	11	Yes	2	Yes	13	19
Waterworks Park	Fairfield	OH	12	Yes			12	20
Boone County Central Park & Arboretum	Union	KY	6	Yes	6	Yes	12	21
Goebel Sports Park	Evansville	IN			10	Yes	10	22
Midwest Sports Complex	Indianapolis	IN	6	Yes	4	No	10	23
England Idlewild Park	Burlington	KY	7	No	2	No	9	24
Copley Road Soccer Complex	Akron	OH			9	No	9	25
Riverside Park	Cincinnati	OH	6	No	2	Yes	8	26
Otto Armleder Memorial Park	Cincinnati	OH			8	No	8	27
Indianapolis Sports Park	Indianapolis	IN	8	Yes			8	28
Billericay Park	Fishers	IN	8	Yes			8	29
Anheuser-Busch Sports Park	Columbus	OH	8	No			8	30
Leo/Grabill Sports Complex	Grabill	IN	8	No			8	31
Championship Park	Kokomo	IN	8	Yes			8	32
Lexington Sporting Club	Lexington	KY			7	Yes	7	33
Kenton County Youth Sports Complex	Independence	KY	6	No			6	34
Heroes Sports Park	Cincinnati	OH	6	No			6	35
Rivershore Sports Park	Hebron	KY	6	Yes			6	36
River City Sports Complex West	Harrison	OH	6	Yes			6	37
Cooper Sports Park	Westerville	OH			6	No	6	38
Total			251		324		575	
Average			10		12		15	

Sources: Facility Websites, Secondary Research.



Note: Does not reflect an all-inclusive supply of facilities.

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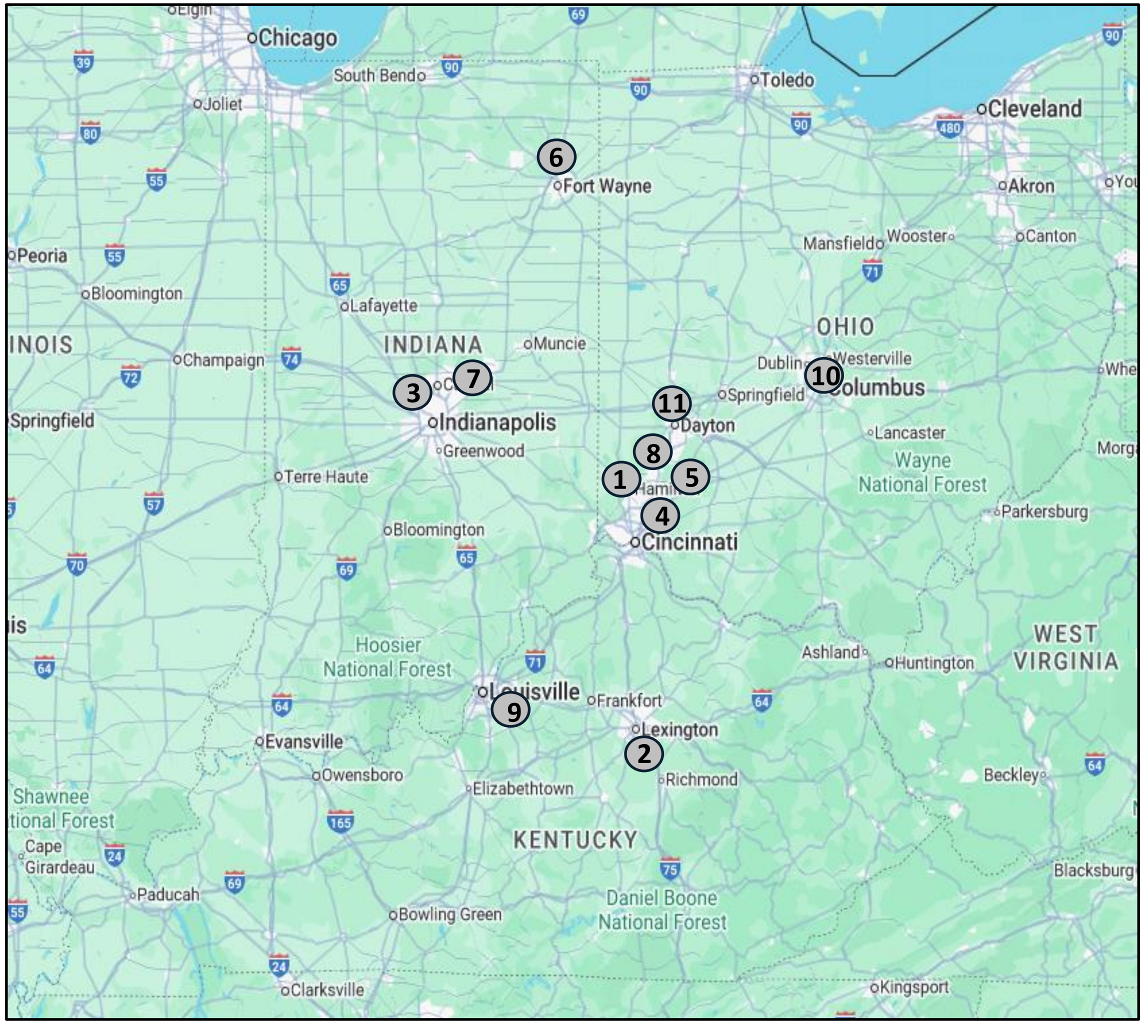
Supply of Local and Regional Sports Facilities (cont'd)

Regional Indoor Sports Facilities

The table below profiles existing regional indoor sports facilities with six or more courts of the same type. As shown, there are 11 profiled facilities that have six or more basketball or volleyball courts, with the largest being Spooky Nook Sports which has 28 basketball courts which convert to 46 volleyball courts. Spooky Nook Sports also has other amenities including a fitness center, 200-meter track, food court, and arcade, among others. On average, the facilities below have eight (8) basketball courts or 12 volleyball courts.

Supply of Regional Indoor Facilities					
			Indoor Courts		
Facility	City	State	Basketball	Volleyball	Key to Adjacent Map
Spooky Nook Sports Champion Mill	Hamilton	OH	28	46	1
Sports Center- Lexington	Lexington	KY	9	9	2
Pacers Athletic Center	Westfield	IN	8	8	3
Ronnie Grandison Sports Academy	Cincinnati	OH	6	8	4
Courts 4 Sports	Mason	OH	6	9	5
SportOne Parkview Fieldhouse	Fort Wayne	IN	6	8	6
Best Choice Fieldhouse	Fishers	IN	6	6	7
Queen City Sportsplex	Cincinnati	OH	6	13	8
MidAmerica Sports Center	Louisville	KY	5	9	9
Fieldhouse USA Columbus	Columbus	OH	5	8	10
Dayton Sports Complex	Dayton	OH	4	7	11
Total			89	131	
Average			8	12	



Note: Does not reflect an all-inclusive supply of facilities.

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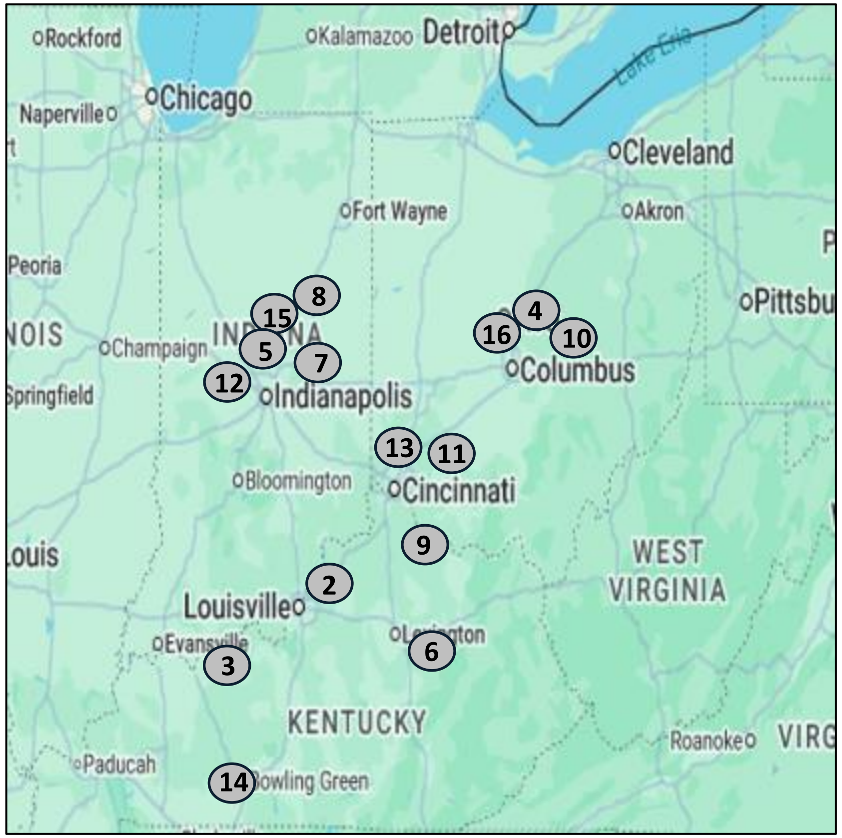
Supply of Local and Regional Sports Facilities (cont'd)

<u>Regional Aquatics Sports Facilities</u>

The following table profiles existing regional aquatics facilities. The profiled facilities have between two (2) and five (5) pools; the average number of pools is two (2). The largest facility in terms of number of pools is the Riviera Club in Indianapolis, which has three outdoor pools and two indoor pools. The facility hosts swim meets, Olympic Swim Trials, and various programs that serve over 1,400 community members.

Summary of Regional Aquatics Facilities				
Facility	**City**	**State**	**Number of Pools**	**Key to Adjacent Map**
The Riviera Club	Indianapolis	IN	5	**1**
Lakeside Swim Club	Louisville	KY	4	**2**
Atlantis Swim and Sports Club	Owensboro	KY	3	**3**
Westerville Aquatic Club	Westerville	OH	3	**4**
Azionaqua Swim Club	Zionsville	IN	2	**5**
Cumberland Hill Pool and Clubhouse	Lexington	KY	2	**6**
Devon Country Club	Indianapolis	IN	2	**7**
Forest Park Aquatic Center	Noblesville	IN	2	**8**
Fort Thomas Swim Club	Fort Thomas	KY	2	**9**
Hydra Aquatics Inc	Blacklick	OH	2	**10**
Indian Hill Swim & Tennis Club	Cincinnati	OH	2	**11**
Indianapolis Healthplex	Indianapolis	IN	2	**12**
Oak Hills Swim and Racquet Club	Cincinnati	OH	2	**13**
Southland Family Club	Bowling Green	KY	2	**14**
Summer Break Swimclub	Fishers	IN	2	**15**
Swim & Racquet Club	Columbus	OH	2	**16**
Total			39	
Average			2	

Sources: Facility Websites, Secondary Research.



Note: Does not reflect an all-inclusive supply of facilities.

Supply of Local and Regional Sports Facilities (cont'd)

Regional Ice Sports Facilities

The following table profiles existing regional ice facilities that have the necessary building program elements to host tournament activity. As shown, most of these facilities have two ice sheets, other than SportONE Parkview Icehouse which has three sheets.

Supply of Regional Ice Rinks				
Facility	**City**	**State**	**Ice Sheets**	**Key to Adjacent Map**
SportONE Parkview Icehouse	Fort Wayne	IN	3	**1**
Carmel Ice Skadium	Carmel	IN	2	**2**
Gilmour Academy Ice Arena	Gates Mills	OH	2	**3**
Hamilton Community Center and Ice Arena	Columbus	IN	2	**4**
Ice Box Skating Rink	South Bend	IN	2	**5**
Iceland Sports Complex	Louisville	KY	2	**6**
Indy Fuel Tank	Fishers	IN	2	**7**
Lexington Ice Center	Lexington	KY	2	**8**
Northern Kentucky Ice Center	Crescent Springs	KY	2	**9**
Queen City Sportsplex	Cincinnati	OH	2	**10**
Total			**21**	
Average			**2**	

Sources: Facility Websites, Secondary Research.

Note: Does not reflect an all-inclusive supply of facilities.

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Supply of Local and Regional Sports Facilities (cont'd)

Planned Sports Facilities

The following summarizes sports facilities that are either in the planning stages or under construction at the time of this report. There isn't a single source that tracks the development of sports facilities. The list below is not meant to be all-inclusive.

- Jennings Sports Park is under construction in Lewis Center, Ohio. Once complete, the complex will have six baseball fields with artificial turf that are capable of being converted for football, lacrosse, soccer and other sports.
- Paducah Sports Park in Paducah, Kentucky will be a $65 million sports complex set covering 130-acres. The facility is expected to be operated privately once it opens in 2025. The state-of-the-art facility will include five baseball diamonds, two softball diamonds, and ten multi-purpose fields. The complex is anticipated to also have a grandstand with a retail shop, a community playground, a disc golf course, picnic areas, and food and beverage concessions. Secondary sources estimate the project to generate $155 million in direct economic impact within its first five years.
- Perry County officials have purchased property near East Perry Elementary School in Hazard, Kentucky, to develop a state-of-the-art sports complex. The project will feature six baseball fields, three multi-purpose football/soccer fields, a track, six tennis courts with pickleball, two basketball courts, playgrounds, putt-putt golf, a batting cage, picnic shelters, and parking. Designed to meet the size requirements for various user groups, the complex will enable Perry County to host large sports tournaments once completed.
- Visit Northern Kentucky recently engaged a third-party consultant to assess the need for new sports facilities in the area. The study found a need for an outdoor sports complex with up to 12 fields. The study also found secondary demand for an indoor facility; however, it noted that Spooky Nook would limit the success of a new indoor facility.
- YMCA of North Central Ohio recently broke ground for a new $22 million indoor and outdoor complex. The facility is expected to open in 2025 at the intersection of Interstate 71 and Ohio Route 97. The facility will provide traditional YMCA programming including sports such as basketball, volleyball, pickleball, indoor track, etc.
- There are plans for a new indoor, 3,000-seat event center in Middletown, Ohio as part of a larger mixed use development including office space, hotels, restaurants and other development. The indoor facility is anticipated to host concerts, sporting events and other activities. The project is expected to create more than $200 million in new construction.

Supply of Local and Regional Sports Facilities (cont'd)

Planned Sports Facilities (cont'd)

- The Center Ice Foundation, a 501©(3) organization, is focused on creating a Regional Sports, Wellness, and Entertainment district in Reynoldsburg, Ohio. This complex is planned to feature a multi-sheet adaptive ice arena and a 60,000 SF indoor field house for lacrosse, soccer, baseball, and football, along with incubation spaces for sports and wellness entrepreneurs. This facility will also look to add a hotel and restaurant to grow their amenities.
- Queen City Sportsplex, which was previously named SportsPlus, is planned to undergo renovations including new locker rooms, an upgraded ice system, and other improvements.
- Shepherdsville, Kentucky is set to welcome a $25.2 million aquatic center, following a groundbreaking ceremony in July 2024. Located on Joe B. Hall Avenue next to Kart Kountry, the center will feature both indoor and outdoor pools, water slides, a splash park, and pickleball courts.
- Project Marvella, an indoor sports facility project that will span 120-acres in Newton County, Indiana is set to begin construction on its $38 million first phase later this year, focusing on an indoor athletic facility with eight basketball courts that can also be used for volleyball, along with a training center for skills development. This phase is expected to open by spring 2026. Subsequent phases will include a leadership and health and wellness center with educational programming, outdoor turf fields, an immersive women's sports museum, and ultimately, a 5,000-seat indoor arena for various events.

Existing Facility Conditions Assessment

Existing Facility Conditions Assessment

The condition of existing local sports facilities impacts their ability to attract sports tourism generating events. In March 2024, representatives of Crossroads Consulting and Convergence Design toured a number of different local sports facilities in Clermont County as well as several competing facilities in nearby counties in the greater Cincinnati area, which are shown below. Some of the local sites visited do not currently have athletic facilities, but rather are sites that could potentially be suitable for the development of new facilities. The purpose of the visit was to assess the competitive marketplace with a firsthand observation of the state of facilities in Clermont County, and their position relative to the local, regional and national market for youth and tournament sports events.

This section is a summary of those site visits, with notes regarding the general composition and condition of the facilities visited. A summary statement at the end of this section expresses Convergence Design's general opinion of the condition and competitiveness of existing sports facilities in Clermont County.

Sites Visited

Local Area:

- Batavia Township Sports Complex
- Cincinnati Flash Baseball
- Clingman Park
- East Fork State Park
- Elite Athletics
- Finley Ray Park
- Mercy Health Training Complex
- Miami Meadows Park
- Midland Baseball Complex
- Nothin' But Net Sports Complex
- Olympic Fields
- Tealtown Ballpark
- West Clermont High School

In Metro Cincinnati:

- Voice of America Athletic Complex (Butler County)
- Warren County Sports Park

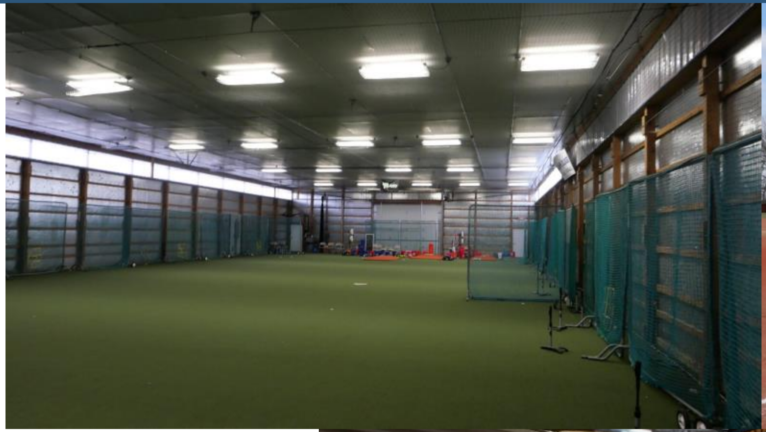
The following pages outline owner/operator, facility type, size, building program elements, and conditions of each of the facilities shown above.

Batavia Township Sports Complex

- Owner/Operator: Batavia Township
- Outdoor
- Approximate size: 50 acres
- Fields: 12 (8 rectangle, 4 diamond)
- Spectator seating: No
- Playing surface: Grass
- Lights: No
- Parking: Paved
- Amenities: Restrooms, concession, playground, community center
- Condition of Facilities: Good

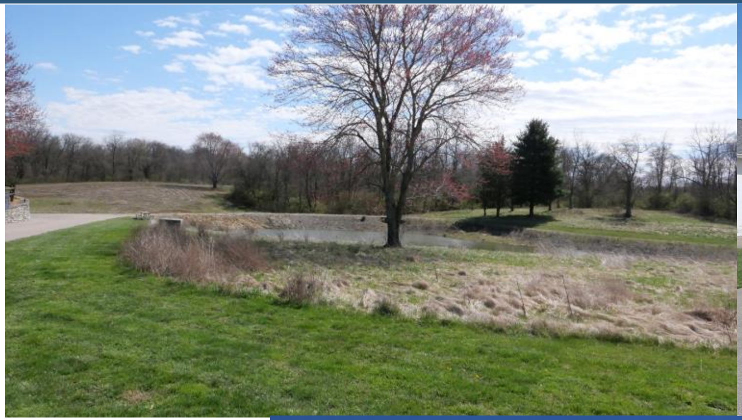
Cincinnati Flash Baseball Complex

- Owner/Operator: Flash Baseball
- Outdoor
- Approximate size: 100 acres
- 10 diamonds
- Spectator seating: Yes
- Playing surface: Grass
- Lights: Yes
- Parking: Gravel
- Amenities: Restrooms, restaurant, event space, training facilities
- Condition of Facilities: Good



Clingman Park

- Owner/Operator: Clermont County
- Outdoor
- Approximate size: 132 acres
- Fields: None
- Spectator seating: No
- Playing surface: N/A
- Lights: No
- Parking: Paved
- Amenities: Barn, shed, offices
- Condition of Facilities: Good



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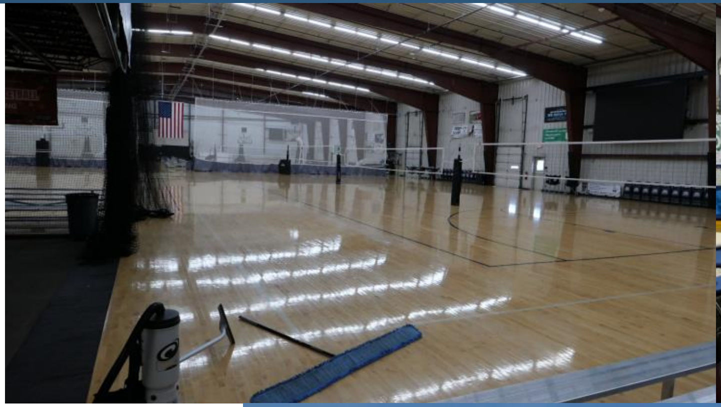
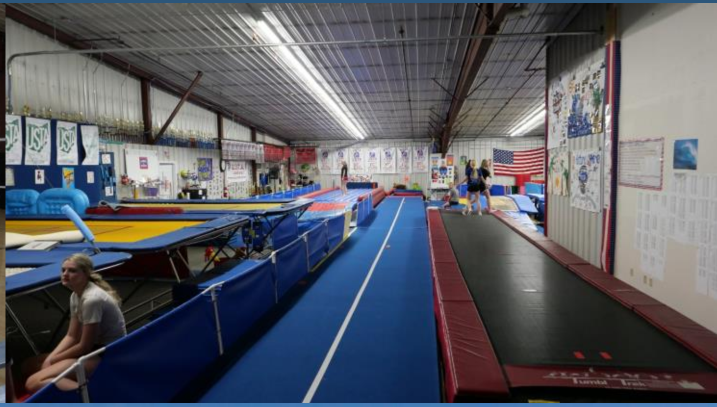
East Fork State Park

- Owner/Operator: Ohio Dept. Natural Resources
- Outdoor
- Approximate size: 10,600 acres
- Fields: None
- Spectator seating: No
- Playing surface: N/A
- Lights: No
- Parking: Paved
- Amenities: Restrooms, concessions, camping, archery, trails, boat ramp
- Condition of Facilities: Excellent

Elite Athletics

- Owner/Operator: Elite Athletics
- Indoor
- Approximate size: 6 acres
- Courts: 7 basketball
- Spectator seating: Limited
- Playing surface: Wood
- Lights: Yes
- Parking: Paved
- Amenities: Restrooms, concessions, meeting
- Condition of Facilities: Very Good





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Finley Ray Park

- Owner/Operator:
  - Owner: City of Milford, Greater Milford Athletic Assn., Northwest Clermont Civic/Athletic
  - Operator: Greater Milford Athletic Assn.
- Outdoor
- Approximate size: 63 acres
- Fields: 37 (19 rect./18 diamond)
- Spectator seating: No
- Playing surface: Grass
- Lights: No
- Parking: Gravel
- Amenities: Limited
- Condition of Facilities: Fair

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Mercy Health Training Center

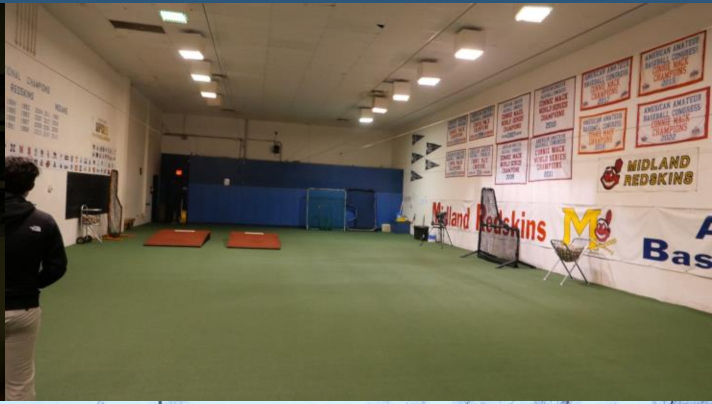
- Owner/Operator: County/FC Cincinnati
- Outdoor
- Approximate size: 16 acres
- Fields: 3 soccer
- Spectator seating: No
- Playing surface: Grass
- Lights: Yes
- Parking: Paved
- Amenities: Elite training facility
- Condition of Facilities: Excellent

Miami Meadows Park

- Owner/Operator: Miami Township
- Outdoor:
- Approximate size: 139 acres
- Fields: 12 (8 rectangle, 4 diamond)
- Spectator seating: No
- Playing surface: Grass
- Lights: No
- Parking: Paved
- Amenities: Restrooms, concessions, media
- Condition of Facilities: Good

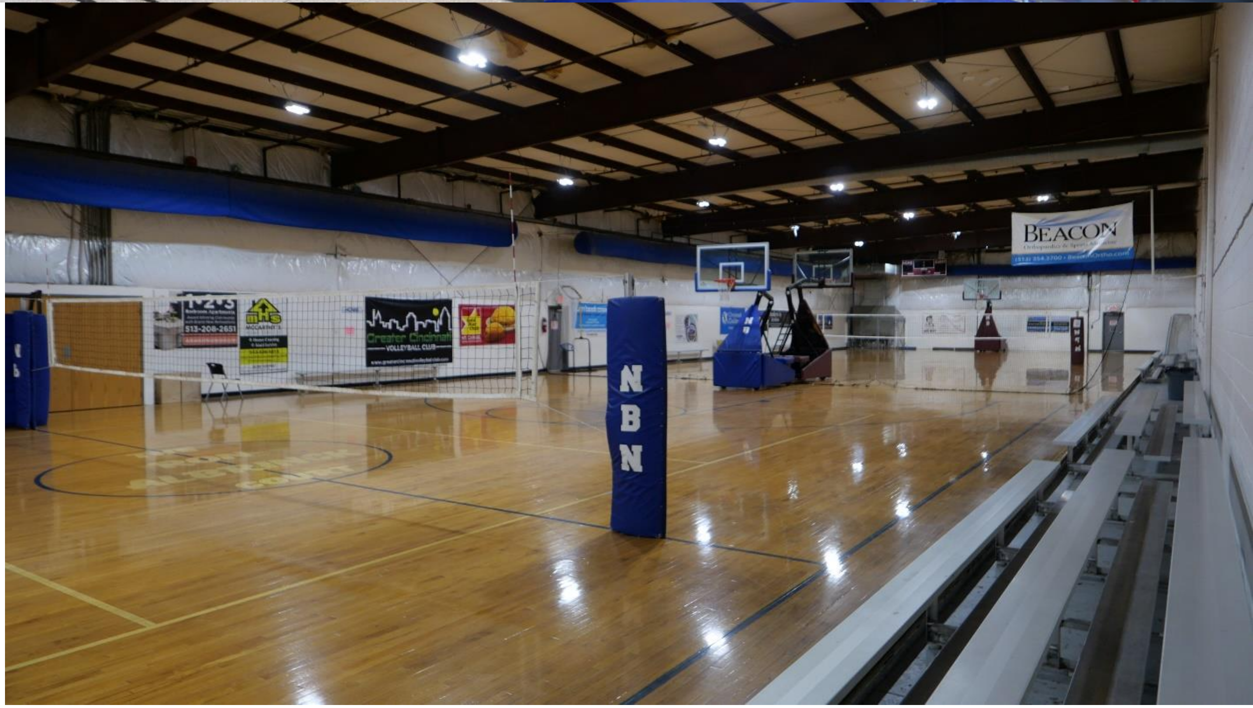
Midland Baseball Complex

- Owner/Operator: Midland Baseball
- Outdoor
- Approximate size: 33 acres
- 3 diamonds
- Spectator seating: Yes
- Playing surface: Turf/grass
- Lights: Yes
- Parking: Paved
- Amenities: Restrooms, concessions, lounge, indoor training facilities
- Condition of Facilities: Good



Nothin’ But Net Sports Complex

- Owner/Operator: Nothin’ but Net
- Indoor
- Approximate size: 4 acres
- 5 courts
- Spectator seating: Limited
- Playing surface: Hardwood
- Lights: Yes
- Parking: Paved
- Amenities: Restrooms, concessions, games
- Condition of Facilities: Fair

Olympic Fields

- Owner/Operator: Ruebel Family LP
- Outdoor
- Approximate size: 54 acres (21 acres sold)
- 13 rectangular fields
- Spectator seating: No
- Playing surface: Grass
- Lights: No
- Parking: Gravel
- Amenities: Limited
- Condition of Facilities: Fair

Tealtown Ballpark

- Owner/Operator: Mt. Carmel Glen-Este Boosters
- Outdoor
- Approximate size: 48 acres
- 17 diamonds
- Spectator seating: Yes
- Playing surface: Grass
- Lights: Yes
- Parking: Paved
- Amenities: Concessions, restrooms
- Condition of Facilities: Fair

West Clermont High School

- Owner/Operator: West Clermont School District
- Indoor/Outdoor: Outdoor + Indoor
- Approximate size: 75 acres
- 5 fields (3 rectangle, 2 diamonds)
- Spectator seating: Yes
- Playing surface: turf/grass
- Lights: Partial
- Parking: Paved
- Amenities: Restrooms, concessions, media
- Condition of Facilities: Excellent

Facility Conditions Assessment

As part of this exercise, the review team visited competing facilities in Warren and Butler Counties, which are suburban counties in the Cincinnati metro area. These facilities are illustrative of the current state of the art for outdoor youth sports facilities and represent direct competitors to any proposed new or enhanced facilities in Clermont County.

Warren County Sports Park

- Owner/Operator: Warren County CVB
- Outdoor
- Approximate size: 172 acres
- Fields: 24 (18 rectangle, 6 diamond)
- Spectator seating: Yes
- Playing surface: grass/turf
- Lights: Partial
- Parking: Paved
- Amenities: Restrooms, concessions
- Condition of Facilities: Excellent

Voice of America Athletic Complex

- Owner/Operator: Butler County Parks
- Outdoor
- Approximate size: 490 acres
- 25 rectangular fields
- Spectator seating: No
- Playing surface: Grass/turf
- Lights: Yes/limited
- Parking: Paved
- Amenities: Restrooms, concessions, media
- Condition of Facilities: Excellent

Facility Conditions Assessment

The table below summarizes the results of Convergence Design's conditions analysis. Color blocks indicate favorable (green), neutral (yellow) or unfavorable (red). The two columns at right are facilities not located in Clermont County, which were reviewed for comparison purposes.

SITE: / Criterion:	Batavia Twp. Park	Flash Baseball	Clingman Park	East Fork State Park	Elite Athletics	Finley Ray Park	Mercy Health Training	Miami Meadows Park	Midland Baseball	Nothin' But Net	Olympic Fields	Tealtown Baseball Park	West Clermont HS	Warren County Sports Park	Voice of America Park
Indoor/Outdoor	Outdoor	Outdoor	Outdoor	Outdoor	Indoor	Outdoor	Outdoor	Outdoor	Outdoor	Indoor	Outdoor	Outdoor	Outdoor	Outdoor	Outdoor
Public/Private	Public	Private	Public	Public	Private	Private	Private	Public	Private	Private	Private	Public	Public	Public	Public
Acres (approx.)	50	100	132	10,600	6	63	16	139	33	4	54*	48	75	172	435
Primary Sport	Soccer	Baseball	TBD	Crew	BB/VB	Soccer	Soccer	Soccer	Baseball	BB/VB	Soccer	Baseball	n/a	Soccer	Soccer
Rectangle Fields/Courts	8	0	0	0	7	19	3	8	0	5	13	0	3	18	25
Diamonds	4	10	0	0	0	18	0	4	3	0	0	17	2	6	0
Amenities	VG	VG	P	Exc.	G	P	Exc.	G	G	Fair	P	Fair	Exc.	Exc.	Exc.
Condition	G	G	G	Exc.	VG	Fair	Exc.	G	G	Fair	Fair	Fair	Exc.	Exc.	Exc.
Near Tourism Infrastructure	No	No	No	No	Yes	Yes	Yes	No	Mid	Yes	Yes	Yes	Yes	Yes	Yes
Improvement Needed	Low	Mid	High	Mid	Low	High	Low	Mid	Mid	High	High	High	Low	Low	Low
Expansion Potential	Low	Mid	High	High	Low	Low	Low	Low	Mid	Mid	Low	Mid	Mid	Low	High

Notes: * Less 21 acres sold for development.
(P) Poor; (G) Good; (VG) Very Good; (Exc.) Excellent

Facility Conditions Assessment

Facilities in Clermont County generally lag behind those in nearby counties as well as regional and national competitors. There are notable differences in the quality of available facilities. Facilities in nearby counties typically have a larger number of adjacent fields, more artificial turf fields, and at least some lighted fields. The visitor amenities are generally of a higher level than those found in Clermont County. Facilities in Clermont County offer a wide range of conditions and amenities for indoor and outdoor sports, but none that currently would be considered first-tier youth sports facilities.

Having said that, there are facilities within Clermont County that hold promise for redevelopment or new development of sports facilities. The most promising sites for new or redevelopment include Tealtown Baseball Park (which would be a candidate for redevelopment), and Clingman Park (for development of new facilities). If the proposed land sale is not completed, Olympic Fields could also be a viable redevelopment option. But with the land sale, the remaining site is probably too small to be viable as a regional sports tourism draw. With investments ranging from moderate to substantial, existing indoor facilities could also be part of an attractive sports tourism package.

Industry Trends & Potential Demand Generators

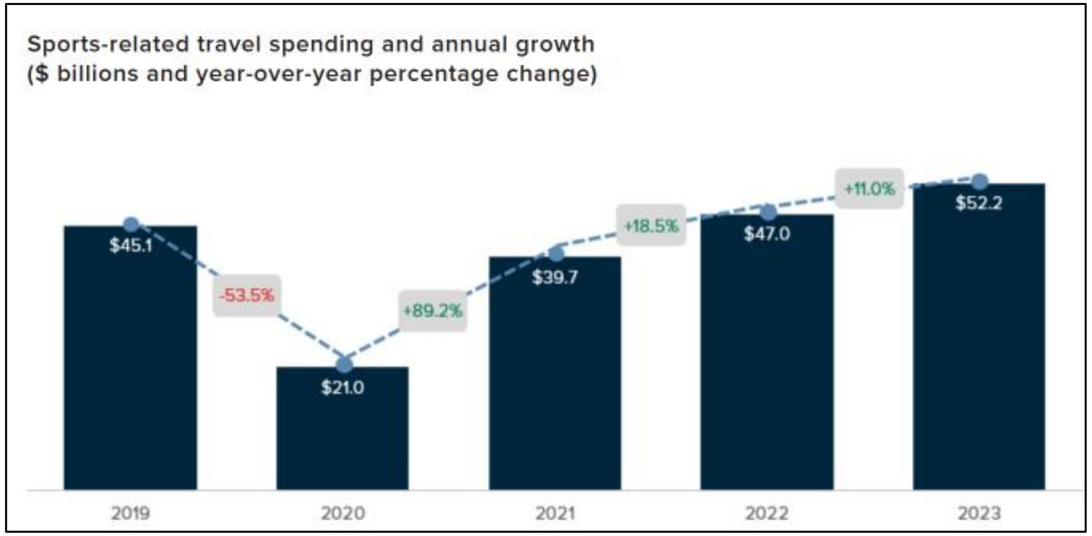
Industry Trends

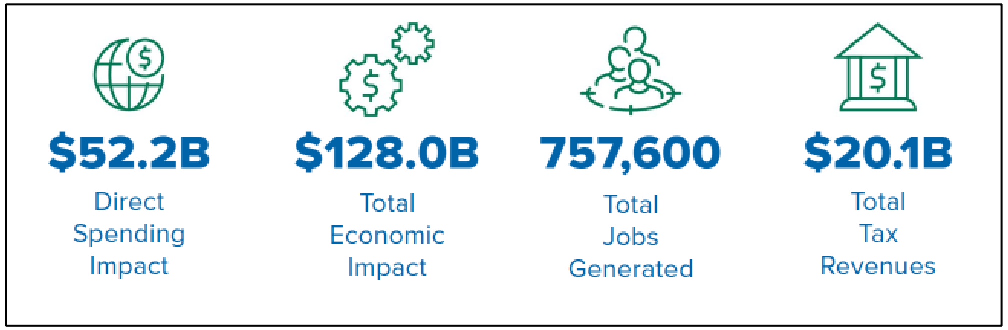
Sports tourism is one of the fastest growing sectors in the tourism industry. Many sports-tourism focused facilities are being developed nationwide to attract visitors and related economic benefits.

The Sports Events and Tourism Association ("Sports ETA") produces an annual State of the Industry Report, which tracks sports tourism spending patterns along with reporting survey-based insights from its destination members. Based on the most recent report published in 2024 which reported 2023 statistics, total sports-related travel spending in the U.S. was approximately $47.5 billion in 2023. Tournament operations generated another 4.7 billion, for total direct spending of $52.2 billion. Direct spending in 2023 was 11% higher than in 2022.

This spending generated a total economic impact of $128.0 billion, which supported 757,600 full and part-time jobs and produced $20.1 billion in tax revenues.

According to Sports ETA, each state played a integral role in sports tourism in 2023. Ohio ranked 6th in terms of sports tourism generated. Some states naturally generate a larger share of the impact given their size, seasonality, location, etc., however, sports tourism marketing funds and other initiatives such as bid fees and local grants also influence how states perform.





Industry Trends – Sports Participation

With respect to programming, potential demand for any sports facility is somewhat dependent on the attributes of the industry as well as specific target market segments. The competitive youth and adult amateur sports industry continues to be a significant market opportunity with multiple sports, age groups and demand segments. Demand for sports tourism events is typically impacted less by economic fluctuations as participants and family/friends are willing to travel significant distances for their preferred sport. In recent years, more communities are developing stand-alone sports tourism-focused facilities to accommodate multiple games/competitions due to their value as a tourism generator. Research indicates that it is important for successful destinations to have a strong volunteer base and elite level leagues to support and promote tournament activity that generates overnight stays.

Generally, sports participation rates are an indicator of demand for sports facilities. Typically, as participation increases, so does the demand for sports facilities. As such, the following pages profile trends in the annual number of participants in various outdoor and indoor sports and the frequency of participation. It also includes data for individual sports or activities by geographic region.

Data used in this analysis was obtained from Sports Business Research Network (SBRnet), a leading provider of sports marketing research in the United States. SBRnet offers an all-encompassing perspective on sports business, drawing upon syndicated and custom proprietary market research, industry reports and licensed industry articles. SBRnet provides nationwide analysis of statistical trends in each major segment of the sports market and the extent to which they interrelate. The source of the data is based on online surveys from over 18,000 nationwide participants conducted by the Sports & Fitness Industry Association ("SFIA").

Industry Trends – Sports Participation (cont’d)

Total and Core Participation

This section focuses on statistics related to sports that could be potential users of enhanced/new sports facilities in the County. Participation data is shown from 2017 through 2023, which is the latest year in which data is available. A participant is defined as an individual six years of age or older who participates in a sport/activity at least once per year. The definition of “core” participants is those that participate in a sport more than 50 times per year.

As shown in the adjacent table, basketball had the highest total participation levels in each of the profiled years, while rugby had the lowest total participation. Nearly all of the profiled sports experienced an increase in participation between 2022 and 2023, with the exception of ultimate frisbee and rugby, which experienced a slight decrease in participation. Pickleball had the largest increase in participation during the same time period which is consistent with SFIA reporting that the sport continues to be the fastest growing sport in the U.S.

U.S. Participation in Select Sports - Population Aged 6+ (in thousands)

Sport	2018	2019	2020	2021	2022	2023	2022-2023 Change
Basketball (Total)	24,225	24,917	27,753	27,135	28,149	29,725	5.6%
Basketball (Casual) <49 times per year	9,335	9,669	11,962	11,019	13,000	14,405	10.8%
Basketball (Core) > 50 times per year	14,890	15,248	15,791	16,116	15,149	15,320	1.1%
Cheerleading (Total)	3,841	3,752	3,308	3,465	3,507	3,797	8.3%
Cheerleading (Casual) <49 time per year	2,039	1,934	1,931	2,030	2,092	2,360	12.8%
Cheerleading (Core) >50 times per year	1,802	1,817	1,377	1,435	1,415	1,438	1.6%
Gymnastics (Total)	4,770	4,699	3,848	4,268	4,569	4,758	4.1%
Gymnastics (Casual) <49 times per year	3,047	3,004	2,438	2,787	3,095	3,315	7.1%
Gymnastics (Core) >50 times per year	1,723	1,695	1,410	1,482	1,473	1,443	-2.0%
Soccer (Indoor - Total)	5,233	5,336	5,440	5,408	5,495	5,909	7.5%
Soccer (Indoor - Casual) <49 times per year	2,452	2,581	3,377	3,054	3,144	3,411	8.5%
Soccer (Indoor - Core) > 50 times per year	2,782	2,755	2,063	2,354	2,351	2,498	6.3%
Soccer (Outdoor - Total)	11,405	11,913	12,444	12,556	13,018	14,074	8.1%
Soccer (Oudoor - Casual) <49 times per year	6,430	6,864	8,360	7,586	7,666	8,706	13.6%
Soccer (Outdoor - Core) > 50 times per year	4,975	5,050	4,084	4,970	5,352	5,368	0.3%
Volleyball (Court - Total)	6,317	6,487	5,410	5,849	6,092	6,905	13.3%
Volleyball (Court - Casual) <49 times per year	2,867	2,962	2,204	2,465	2,798	3,481	24.4%
Volleyball (Court - Core) >50 times per year	3,450	3,525	3,206	3,384	3,293	3,425	4.0%
Wrestling (Total)	1,908	1,944	1,931	1,937	2,036	2,121	4.2%
Wrestling (Casual) <49 times per year	1,160	1,189	1,239	1,290	1,452	1,589	9.4%
Wrestling (Core) >50 times per year	748	755	692	647	585	532	-9.1%
Martial Arts (Total)	5,821	6,068	6,064	6,186	6,355	6,610	4.0%
Martial Arts (Casual) <49 times per year	1,991	2,178	2,679	2,728	3,114	3,481	11.8%
Martial Arts (Core) >50 times per year	3,830	3,890	3,385	3,458	3,241	3,130	-3.4%
Badminton (Total)	6,337	6,095	5,862	6,061	6,490	6,513	0.4%
Badminton (Casual) <49 times per year	4,555	4,338	4,129	4,251	4,636	4,743	2.3%
Badminton (Core) >50 times per year	1,782	1,756	1,733	1,810	1,855	1,771	-4.5%
Ultimate Frisbee (Total)	2,710	2,290	2,325	2,190	2,142	2,086	-2.6%
Ultimate Frisbee (Casual) <49 times per year	1,852	1,491	1,476	1,441	1,438	1,523	5.9%
Ultimate Frisbee (Core) >50 times per year	858	799	849	749	703	563	-20.0%
Track and Field (Total)	4,143	4,139	3,636	3,587	3,690	3,905	5.8%
Track and Field (Casual) <49 times per year	2,071	2,069	1,589	1,712	1,896	2,093	10.4%
Track and Field (Core) >50 times per year	2,072	2,070	2,046	1,875	1,794	1,811	0.9%

Sport	2018	2019	2020	2021	2022	2023	2022-2023 Change
Flag Football (Total)	6,572	6,783	7,001	6,889	7,104	7,266	2.3%
Flag Football (Casual) <49 times per year	3,573	3,794	4,287	4,137	4,573	4,624	1.1%
Flag Football (Core) >50 times per year	2,999	2,989	2,714	2,752	2,531	2,642	4.4%
Tackle Football (Total)	5,157	5,107	5,054	5,228	5,436	5,618	3.3%
Tackle Football (Casual) <49 times per year	2,258	2,413	2,390	2,642	3,120	3,278	5.1%
Tackle Football (Core) >50 times per year	2,898	2,694	2,665	2,586	2,316	2,340	1.0%
Touch Football (Total)	5,517	5,171	4,846	4,884	4,843	4,949	2.2%
Touch Football (Casual) <49 times per year	3,313	3,065	2,990	3,171	3,201	3,301	3.1%
Touch Football (Core) >50 times per year	2,204	2,105	1,856	1,713	1,642	1,648	0.4%
Baseball (Total)	15,877	15,804	15,731	15,587	15,478	16,655	7.6%
Baseball (Casual) <49 times per year	6,563	6,655	8,089	7,392	7,908	8,934	13.0%
Baseball (Core) >50 times per year	9,314	9,149	7,643	8,195	7,570	7,722	2.0%
Lacrosse (Total)	2,098	2,115	1,884	1,892	1,875	1,979	5.5%
Lacrosse (Casual) <49 times per year	1,036	1,021	902	1,009	999	1,129	13.0%
Lacrosse (Core) >50 times per year	1,061	1,094	982	883	876	850	-3.0%
Pickleball (Total)	3,301	3,460	4,199	4,819	8,949	13,582	51.8%
Pickleball (Casual) <49 times per year	2,011	2,207	2,835	3,454	6,647	8,736	31.4%
Pickleball (Core) >50 times per year	1,290	1,253	1,364	1,365	2,302	4,846	110.5%
Rugby (Total)	1,560	1,392	1,242	1,238	1,166	1,112	-4.6%
Rugby (Casual) <49 times per year	998	835	807	778	758	729	-3.8%
Rugby (Core) >50 times per year	562	557	435	460	408	384	-5.9%
Fast Pitch Softball (Total)	2,303	2,242	1,811	2,088	2,146	2,323	8.2%
Fast Pitch Softball (Casual) <49 times per year	1,084	993	650	934	1,002	1,123	12.1%
Fast Pitch Softball (Core) >50 times per year	1,219	1,250	1,162	1,154	1,144	1,201	5.0%
Slow Pitch Softball (Total)	7,386	7,071	6,349	6,008	6,036	6,356	5.3%
Slow Pitch Softball (Casual) <49 times per year	3,281	3,023	2,753	2,729	2,666	2,939	10.2%
Slow Pitch Softball (Core) >50 times per year	4,105	4,048	3,596	3,279	3,370	3,417	1.4%
Swimming (Total)	3,045	2,822	2,615	2,824	2,904	3,327	14.6%
Swimming for Fitness <49 times per year	1,678	1,529	1,524	1,708	1,916	2,280	19.0%
Swimming for Fitness (Core) >50 times per yea	1,367	1,293	1,091	1,116	988	1,047	6.0%
Ice Hockey (Total)	2,447	2,357	2,270	2,306	2,278	2,496	9.6%
Ice Hockey (Casual) <49 times per year	1,105	1,040	1,165	1,206	1,209	1,458	20.6%
Ice Hockey (Core) >50 times per year	1,342	1,317	1,105	1,101	1,068	1,038	-2.8%

Industry Trends – Sports Participation (cont'd)

<u>Participation by Geographic Region</u>

The adjacent tables summarize sports participation by geographic region. At the time of this report, the most recent geographic participation data is for 2022. SBR classifies Ohio in the East North Central region, along with Illinois, Indiana, Michigan, and Wisconsin. This region had high participation in each of the profiled sports and the highest percentage of participation in volleyball.

Sports Total Participation by Geographic Region (% of Participants)

Geographic Region	Flag Football	Lacrosse	Cheerleading	Gymnastics	Soccer (Outdoor)	Martial Arts	Tackle Football	Touch Football
South Atlantic	25%	24%	23%	23%	22%	22%	22%	22%
Pacific	17%	13%	13%	15%	19%	18%	13%	15%
Middle Atlantic	18%	24%	13%	14%	14%	16%	13%	19%
East North Central	**12%**	**11%**	**17%**	**14%**	**14%**	**13%**	**14%**	**13%**
West South Central	10%	5%	12%	11%	10%	12%	14%	12%
East South Central	4%	2%	9%	5%	5%	4%	8%	6%
Mountain	6%	7%	4%	7%	7%	6%	5%	5%
West North Central	5%	6%	6%	6%	6%	5%	8%	5%
New England	3%	8%	3%	4%	4%	4%	3%	3%
Total	**100%**	**100%**	**100%**	**99%**	**101%**	**100%**	**100%**	**100%**

Sports Total Participation by Geographic Region (% of Participants)

Geographic Region	Pickleball	Rugby	Badminton	Track and Field	Wrestling	Soccer (Indoor)	Basketball	Baseball
South Atlantic	21%	21%	21%	20%	20%	20%	20%	19%
Pacific	16%	22%	18%	16%	14%	17%	17%	17%
Middle Atlantic	15%	22%	18%	13%	15%	17%	16%	17%
East North Central	**16%**	**11%**	**13%**	**15%**	**17%**	**17%**	**15%**	**16%**
West South Central	10%	10%	9%	12%	12%	9%	12%	10%
East South Central	4%	2%	5%	5%	6%	3%	6%	5%
Mountain	8%	8%	5%	7%	8%	6%	6%	6%
West North Central	6%	3%	5%	9%	7%	6%	5%	6%
New England	4%	3%	5%	4%	3%	5%	4%	4%
Total	**100%**	**102%**	**99%**	**101%**	**102%**	**100%**	**101%**	**100%**

Sports Total Participation by Geographic Region (% of Participants)

Geographic Region	Slow Pitch Softball	Volleyball	Fast Pitch Softball	Ice Skating	Ice Hockey	Swimming
South Atlantic	19%	18%	17%	17%	14%	20%
Pacific	13%	14%	13%	15%	17%	19%
Middle Atlantic	17%	12%	15%	20%	20%	21%
East North Central	**18%**	**20%**	**16%**	**16%**	**17%**	**13%**
West South Central	9%	12%	12%	8%	5%	10%
East South Central	6%	5%	8%	4%	1%	3%
Mountain	6%	7%	5%	7%	8%	8%
West North Central	7%	9%	10%	8%	9%	4%
New England	5%	2%	3%	6%	8%	2%
Total	**100%**	**99%**	**99%**	**101%**	**99%**	**100%**

Notes: Sports Business Research Network classifies Ohio into the East North Central Region.
Not all totals add to 100% due to rounding.

Source: Sports Business Research Network.

Industry Trends – Facilities

Sports tourism facilities have continued to change over the years in terms of offerings and functionality. Tournament organizers increasingly prefer first-class facilities with top of the line playing surfaces, equipment and amenities. The following summarizes recent trends related to both outdoor and indoor sports tourism facilities related to design and capabilities.

<u>Outdoor Facility Trends</u>

Flexibility – Outdoor complexes are increasingly being designed to accommodate multiple sports (including diamond and rectangular field sports) on the same field. Designing fields in this manner can maximize usage and revenues; reduces the amount of acreage needed for development; reduced maintenance costs, allow for shared infrastructure such as concessions, restrooms, etc.

Synthetic Turf – Synthetic turf fields have become a common and popular choice among communities and tournament organizers, as they have several advantages over natural grass. Turf fields can significantly reduce the number of cancellations due to inclement weather given their durability and drainage. With limited risk of cancellation, marketability for turf fields is enhanced and usage is more consistent on an annual basis. Further, turf fields can be played on year-round without needing to plan downtime for recovery. Maintenance is also typically lower, as turf fields do not require mowing, fertilization, etc. resulting in cost savings over time.

Covered/Hospitality Areas – Attendees are seeking areas between games that are shaded and comfortable. These spaces are usually best served in areas that are highly trafficked and have easy access from the fields.

Entertainment Areas – Tournaments and competitions draw families, that seek things to do before and during games. Playgrounds and splash pads are common amenities that are being developed to help keep non-participants entertained. These amenities can increase the likelihood of return visits and increase the amount of time families stay on property, thus increasing concessions sales.

Warm up Space – Dedicated warm-up space for teams has become an expectation among players and event organizers. Proper warm up space can enhance attendee safety as well as the flow of people throughout the complex.

Vendor/Sponsor Space – Space for vendors, sponsors, food trucks, tents, etc. creates the opportunity for additional revenue generation. These spaces should be flexible to accommodate the various needs of different events.

Technology – Providing Wi-Fi access that is capable of streaming has become a requirement of facilities. Opportunities to partner with service providers can be pursued to help reduce associated costs.

Industry Trends – Facilities

Indoor Facility Trends

Flexibility – Indoor sports facilities are being designed in a manner that allows for a variety of events to be hosted including different sports, expos, tradeshows, meetings, and other community events. A flexible design allows management to maximize usage and revenues, especially on weekdays when no tournaments are occurring.

Number of Courts – While it was common in the past for tournament organizers to use multiple facilities in a market to host their event, a single facility with a critical mass of courts/space is now preferred to allow for easier scheduling, an enhance attendee experience, consistency in playing surfaces, and event control.

Entertainment Areas – Entertainment areas are popular for both participants and their siblings before, during and after games. Popular amenities in indoor sports facilities include arcades, rock climbing walls, esports lounges, golf simulators and others. These amenities can increase the likelihood of return visits and can create additional revenue streams for a facility.

Concessions – Food and beverage options and services at indoor sports facilities are evolving to enhance the overall attendee experience. Facilities are implementing healthier options; partnering with local vendors to provide fresh, sustainable food; offering craft beverages to create a unique experience; adopting technology that allows for mobile ordering and delivery and incorporating food trucks that provide a wide range of food and beverage options.

Technology – As with outdoor facilities, providing Wi-Fi access that is capable of streaming has become a requirement of facilities.

Leasing Space – Some indoor sports facilities lease a portion of their building to a compatible use such as a physical therapy clinic which can increase revenue generation.

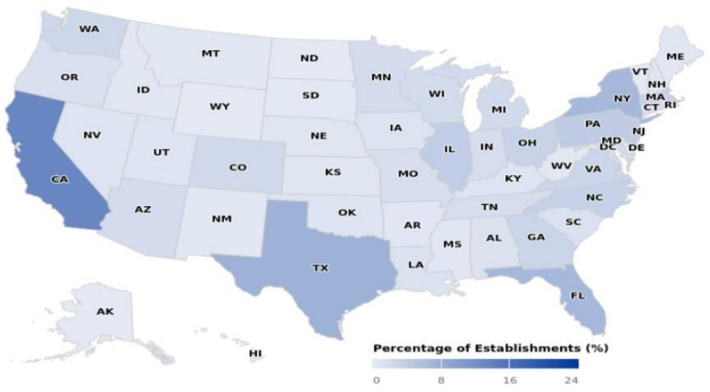
Indoor Facility Trends (cont'd)

According to IBISWorld, a leading publisher of business intelligence specializing in industry and procurement research, most of the nation's indoor sports establishments are in the Southeast (23.3%). The Great Lakes region, which includes Ohio, accounts for approximately 13% of indoor sports establishments. IBISWorld reports that the distribution and location of these establishments are highly correlated to population, as the more populated regions tend to have more establishments. Indoor sports fieldhouses/complexes are increasingly being developed nationally to accommodate large tournaments/competitions that generate economic impact to the surrounding area. Industry operators have also continued to build larger, state-of-the-art, multisport facilities to accommodate a larger customer base. They have evolved from largely industrial steel buildings into hybrid sports and entertainment complexes with a wide range of amenities such as lounges; exercise equipment; food and beverage areas; and in-house physical trainers, equipment and sports instruction.

To combat increased competition, rising utility costs and continually shifting consumer sport and leisure preferences, industry operators have been developing larger state-of-the-art facilities which may include facilities for multiple sports. The construction of larger facilities that can accommodate more than one sport helps to spread high-fixed building and maintenance expenses over a larger and more diversified customer based to maintain profitability.

According to IBISWorld, indoor ice rinks were estimated to account for the largest portion of industry revenue in 2023, followed by indoor soccer complexes, indoor swimming complexes and indoor basketball complexes. While ice rinks and swimming complexes were estimated to account for a large portion of industry revenues, IBISWorld reports that these facility types are extremely capital-intensive and require significant maintenance costs. IBISWorld also reports that indoor basketball, volleyball and soccer complexes are less capital-intensive and are accommodating sports increasing in popularity. Indoor track facilities were estimated to account for a small percentage of industry revenue, given their limited use for group events.

Indoor Sports Facilities Concentration in the U.S.



Source: IBIS

Potential Demand Generators

As part of this study effort, input was sought from various stakeholders. The objective of these discussions was to obtain perspectives on the strengths, challenges, and opportunities associated with existing sports facilities in the County as well as opportunities to increase sports tourism through improvements to existing facilities and/or the development of new facilities. Direct input was received from representatives of the Clermont County CVB, Clermont County, local townships, Clermont County Chamber of Commerce, Little Miami River Chamber Alliance, Milford-Miami Township Chamber of Commerce, Coney Island, etc. In addition, input was received from management teams of local sports facilities. The following summarizes common themes from the input received.

- Primary objectives of improvement and/or new sports facilities are to attract events that generate tourism in the County as well as better accommodate the sports needs of residents and local organizations.
- Residents are constantly leaving the County to participate in tournaments.
- There is a need to enhance the County's brand as a sports destination.
- There are numerous attractions in the County and nearby in Cincinnati that could be appealing to visitors.
- There are nearly 1,500 hotel rooms in the area, many of which are not top-quality which could be a challenge in attracting tournaments and overnight visitors.
- The quality of existing sports facilities in the County lags behind facilities in surrounding counties which limits marketability.
- There are a limited number of outdoor sports tournaments in the County because existing facilities either focused on residential needs and/or need physical improvements to attract events.
- Tealtown Ballpark was once a popular tournament destination but currently needs major improvements. If this facility was tournament-quality, it would attract a significant number of baseball and softball tournaments. Several baseball/softball organizations have told the CVB that they will not come back to the County unless the park was substantially upgraded.
- There is an opportunity to leverage the presence of F.C. Cincinnati to host soccer tournaments and related activities.
- Additional outdoor turf fields would be highly utilized.
- There are several indoor sports facilities that host tournaments; however, some need physical improvements.
- There is a gap in the market for aquatics and ice facilities east of Cincinnati. There are preliminary plans for the development of an ice facility in the County consisting of multiple sheets as well as volleyball courts.
- A large, indoor multi-use facility would be a benefit to the community and enhance the sports tourism product.

Potential Demand Generators (cont'd)




Crossroads also obtained feedback from a limited number of potential user groups related to potential programming, building program requirements, destination attributes, etc. The goal of this outreach was to identify potential market opportunities to increase tourism in the County as well as required facility program elements and supporting infrastructure needs. The input obtained is not intended to be statistically valid but rather reflective of a representative sample of potential user groups. The following summarizes input from those organizations that completed a survey. More than 100 individuals who organize local, regional, national and international sporting events were contacted through a combination of web-based surveys and telephone calls. Responses were received representing a variety of sports types including, but not limited to, baseball, softball, basketball, volleyball, soccer, archery, lacrosse, field hockey, cheer/dance, wrestling, gymnastics, football, swimming, diving, ice hockey, inline hockey, tumbling, taekwondo, martial arts, track and field, etc.

The following summarizes common themes expressed by all user groups.

- 43% of respondents indicated they represent outdoor sports, 43% represent indoor and 13% represent both indoor and outdoor sporting events.
- When asked how likely they were to host an event in Clermont County if existing facilities were enhanced and/or a new facility was built that met their needs, 88% answered "Extremely Likely" or "Likely". Of those that answered "Unlikely" or "Extremely Unlikely", reasons stated included supply of competitive facilities, specifically Spooky Nook, and the need for an arena or convention center that is near a major airport and within walking distance of hotels.
- Survey responses indicate there is an opportunity to host a variety of sports but there is the highest opportunity to host diamond field and rectangular field sports. From an indoor perspective, surveys indicate the strongest demand is for basketball.
- Proximity to hotels; affordability; proximity to entertainment and restaurants; geographic location; highway accessibility; and proximity to the participant base were all considered important market attributes in attracting their event. Proximity to a major airport was the least important attribute.
- Most respondents indicated their attendees would travel 15 to 30 minutes from a host facility to hotels, dining, and entertainment options.
- Most respondents have not held an event in Clermont County; however, of those that have, facilities used included Tealtown Ballpark, Miami Meadows Park, Mercy Health Training Complex, and Elite Athletics. These respondents noted that Tealtown Ballpark needs to be updated; more soccer fields are needed in the County; more diamond fields are needed in the County, specifically a critical supply in one location; and turf fields would be nice to have.

Potential Demand Generators (cont'd)

The following summarizes feedback by the type of facility that respondents indicated they would utilize.

Potential Outdoor Field Complex Users

- Respondents currently host events throughout the U.S. including facilities such as Warren County Sports Complex, Mason Sports Park, Voice of America Sports Complex, Spindler Road Park, etc.
- While there is a large supply of outdoor complexes in the region, many users expressed interest in utilizing a tournament quality facility in the County.
- Sports organizers expressing interest in potentially hosting an event(s) at an outdoor complex require an average of 6 diamond fields and 10 rectangular fields.
- When asked what type of playing surface is required for their events, 46% stated either artificial turf or natural grass and 31% stated artificial turf. Two event organizers prefer a combination of grass and turf fields. Only one event organizer required natural grass.
- Many respondents indicated that their event requires concessions, field lights, spectators seating, an office/breakout room and Wi-Fi access.
- Most survey respondents indicated they would be interested in hosting tournaments. Other activities included camps and clinics. The majority indicated their tournaments are regional (multi-state).
- Half of respondents stated they would host an event annually. Respondents indicated that the proposed new outdoor facility would host events year-round with the busiest months being March through October.

Potential Demand Generators (cont'd)

Potential Indoor/Other Facility Users

- Respondents currently host events throughout the U.S. including facilities such as Spooky Nook, Cedar Point Sports Center, The Bridge, USA Hockey Arena, various convention centers, etc.
- While respondents represented a variety of sports, most indoor facility users expressed a need for indoor courts. The average number of basketball courts required was 6, which equates to 12 volleyball courts. Most users required either hardwood or sport courts; however nearly 30% specifically require hardwood.
- Multiple users stated that Spooky Nook Sports is the primary indoor court facility in the area, and any indoor facility would need a significant supply of proximate hotels to be competitive.
- Those user groups that utilize ice indicated they require between two and four sheets. Two sheets of ice is the minimum requirement for tournament activity.
- Generally, aquatics users require a 50-meter pool and a leisure/warm-up pool.
- Many respondents indicated that their event requires concessions, spectator seating, Wi-Fi, and multi-purpose space.
- Half of survey respondents indicated they would be interested in hosting tournaments. Other activities included camps and league play. Most tournaments were categorized as either regional (multi-state) or national.
- Most respondents stated they would host an event at least one time per year at an enhanced/new indoor facility.
- In general, respondents indicated that they host events year-round; however, the most popular months for events were January through May.

Market Assessment

Market Assessment

Based on the market research, the following pages provide an overview of key success factors for sports tourism facilities, a summary of relative market strengths/opportunities and challenges/threats associated with enhanced and/or new sports facilities in the County, and building program recommendations that seek to enhance the County's sports tourism product.

Key Success Factors

As sports tourism continues to grow, there is increasing competition for tourism dollars as evidenced by the industry data and by the number of communities with sports tourism-focused organizations. The spending generated by athletes, coaches, family and friends can augment other visitor streams such as business, convention/meeting and leisure travelers. Research indicates that competitive sporting events are less impacted by economic downturns as families are committed to their children's athletic activity. Sports-related tourism can be developed based on a community's strengths, the presence of elite level athletes, leagues, and/or collegiate teams in particular sports. Further, a strategic plan for sports tourism can serve to expand visitor seasons beyond a community's typical peak. The adjacent table outlines the critical success factors common in sports tourism destinations based on conversations with destination marketing organizations ("DMOs") and sports commissions across the U.S., as well as our work with other communities. Each of these is described on the pages that follow.

Key Success Factors
Stakeholder Political Support
Marketing and Branding
Quality Facilities
Destination Attributes
Relationships with Event Organizers
Event Incentives
Ownership / Management Structure

Market Assessment (cont'd)

Stakeholder Political Support

Successful destinations have political support from a variety of public and private stakeholders that prioritize sports tourism as an economic generator. These include local and State governments, local leagues, collegiate athletic departments, DMOs, economic development agencies, hospitality industry professionals, facility management and event organizers. Input from other communities reiterated the necessity to have the support of local stakeholders. Without the understanding from each of these organizations regarding the value of competitive sporting events, it can be an uphill battle to effectively attract and service them. Typically, one organization spearheads the effort to educate local stakeholders on the value such as a DMO or sports commission. In addition to marketing and branding, this organization serves as a liaison within the community between sports organizations, facilities, visitor amenities and funding partners. Developing regular communication to these groups outlining the economic value of sporting events within the local area serves to elevate this visitor segment and helps to harness their on-going support.

Marketing and Branding

As more communities realize the value of sports tourism and invest in quality facilities, there is greater competition for these events. Destinations that create a sports marketing brand are more recognizable by the event organizers as well as the participants and spectators and, as a result, can serve to draw a greater number of visitors. A brand should include differentiating factors such as unique indoor/outdoor activities including historical attractions, beaches, lakes, theme parks, etc. Establishing a brand and reputation for well-executed events includes providing appropriate facilities as well as visitor amenities and event services such as a reliable, knowledgeable volunteer base. This can mean providing appropriate security and traffic control, as well as coordinating with event organizers to showcase area attractions, restaurants or shopping.

Market Assessment (cont'd)

Quality Facilities

Given the variety of sports and respective facility requirements, it is difficult for a single destination to be successful at attracting all sports. Rather, destinations that offer high-quality facilities in a select number of sports can better serve these target market segments. However, a physical asset alone does not ensure success in sports tourism. Management at other facilities stress the importance of establishing a facility's mission at the outset. The goal of primarily serving as an economic generator rather than meeting local sports and recreational needs requires different marketing, booking, staffing, and maintenance procedures. If a facility is primarily focused on generating economic impact, it may choose to limit local play and reserve courts for high-end tournaments that draw out-of-town participants and spectators. Increasingly, local parks and recreation departments accommodate league play while special purpose facilities are reserved for league games (not practices) and tournament/showcase events to limit wear and tear and establish the venue as an attraction. Some tournament-quality facilities choose to limit league play to weekdays, reserving weekends for competitions that draw out-of-town visitors.

Balancing the booking of a facility between tournament play and local league use is a critical factor in its marketability. Having a strong base of local sports leagues can be a significant revenue generator as well as important partners in attracting regional/national tournaments and staffing these events with a volunteer pool. As such, continuing cooperative relationships with local leagues is imperative to a venue's ability to serve as a sports tourism generator. However, management at some sports facilities indicate that allowing too much league play can increase maintenance expense and potentially hinder marketability and availability for tournaments drawing out-of-town attendees.

Destination Attributes

As previously mentioned, successful destinations require supporting infrastructure elements such as hotels, restaurants, retail and entertainment/ recreation establishments. Unlike convention/meeting attendees, competitive sporting event organizers are accustomed to driving up to 30 minutes to these amenities from the host facility(s). These elements are important and can impact the overall marketability, resulting financial success and the economic impact of sports facilities. Hotel supply is generally an important factor in drawing tournaments/competitions that draw out-of-town attendees. Providing convenient access to shopping, dining and entertainment can create a vibrancy that differentiates one destination from the others.

Market Assessment (cont'd)

Relationships with Event Organizers

Successful sports tourism destinations have sports marketing agencies and facilities managed by staff with a network of contacts in relevant sports industries. These include local, state, regional and national sports organizations that compete in or hold tournaments/competitions. Fostering these relationships by attending industry conferences, attending major tournaments in other cities and hosting familiarization tours to showcase a destination's facilities and visitor amenities is important to set a destination apart. Communities with strong relationships are often able to secure multi-year contracts for significant annual events or an agreement to host numerous competitions sponsored by one organization. Utilizing local stakeholder connections with state/regional/national event organizers can broaden these relationships. For instance, a local elite league that participates in a national annual tournament or a college athletic department may have connections to a NCAA showcase or tournament.

Event Incentives

Attracting events that generate sports tourism spending has traditionally been done by paying bid fees to target events. As more communities have realized the value of this visitor niche and invested in facilities to accommodate them, bid fees have increased. In response, sports marketing organizations are more commonly creating their own events and/or offsetting event costs rather than paying bid fees directly to event organizers.

The benefits of creating tournaments include harnessing local elite level teams and their regional/national connections to promote participation; controlling the event date during a community's shoulder visitation season; and lack of competition from other host cities through strategic scheduling. The trade-off to creating tournaments is the need to provide all event services and staff, which requires a strong organizing committee with an active volunteer base and good working relationships with sports venue management teams, hoteliers, local police for traffic/security, etc. According to sports marketing representatives, this works best for sports in which the community has a strong niche and quality venues.

Sports marketing organizations also work to offset specific costs associated with hosting an event in their community, such as sponsoring a catered function, utilities associated with lighted fields, facility rental, event security, parking staff, etc. In doing so, the organization helps to ensure that their investment is retained within the local community.

Sports commissions and associations indicate that the methodology for tracking the success of sports tourism efforts should be agreed upon by all agencies involved. Organizations can be evaluated by hotel room generation specific to sporting events and/or based on an agreed upon economic impact model of events. These models help guide decisions regarding whether bid fees and/or event incentives are financially reasonable for that event.

Market Assessment (cont'd)

Ownership/Operating Model

The quality of ownership and management of a sports facility can have a direct impact on performance. Similar sports facilities are typically owned and operated under one of several models such as:

- Public model
- Private model
- Public/private model
- Public/nonprofit model

The following provides a brief description of each.

Public Model

The land and the facility are owned, maintained and operated by a public entity such as a city or county. In many instances, publicly owned facilities are operated as a division within a municipal department. Advantages of this method include shared human and financial resources among the jurisdiction's various facilities as well as economies of scale in terms of utilities, insurance, and maintenance expenses. This management approach is most common where the facility(s) are primarily operated as a residential amenity, much like a library or public park and, as such, a greater portion of attendance is typically locally based.

However, if the venue is envisioned to attract sports tourism, disadvantages of traditional governmental management include balancing local recreational/scholastic usage needs with those of events that generate overnight visitors which can be politically challenging, requirements associated with staff work hours, and limited staff connections in the broader industry.

Private Model

In some cases, sports facilities are constructed, maintained and operated by private entities. Rates are typically charged at market value to create a profitable operating scenario. As such, facilities operating under this approach are operated as for-profit businesses with missions and operating objectives in place that limit low-cost activities such as developmental leagues. In some instances, these types of facilities focus on niche sports and cater to elite level athletes where the private owners/managers can leverage their reputation and professional network outside the community to develop and attract tournaments.

Market Assessment (cont'd)

Public/Private Model

In this approach, a public entity such as a city or county may own the land and/or the venue and lease operations and maintenance of the asset to a third-party private entity. This model is often utilized when the venue is developed with objectives to generate economic activity, address residential needs, and achieve financial self-sustainability. While some facilities utilizing this model are operationally self-sufficient, others still require annual financial operating support by the public owner. Third-party management companies typically bring unique knowledge and expertise of the facility management industry to a venue. The professional management company is generally compensated with an annual base fee in addition to a performance or incentive fee. The performance or incentive fee can be capped and is usually tied to producing measurable and desired operating results such as increasing the number of events and/or attendance and/or improving the financial operations as compared to a baseline benchmark target. Because many management contracts include financial incentives, the professional management company is generally profit driven. As such, there is sometimes a conflict for the management team to balance hosting events that operate at a profit and positively impact the facility's financial performance and hosting events that do not necessarily contribute positive cash flow but meet broader programming and operating goals for the community.

Disadvantages associated with this operating model include potential loss of direct control of the asset, profit motive versus community benefit and fees paid to the facility management company. When using this approach, the public entity's priorities for the venue should be clearly articulated in the lease or management agreement along with a supporting mission statement, booking policy, rental rates and other operating policies.

Some facilities are publicly owned and managed by a local sports club. In this scenario, the local club typically negotiates a long-term usage agreement with the owner on an annual basis. One downside of this model is that the club typically has the first right to utilize the facility throughout the year which limits the number of other events and activities can be hosted.

Market Assessment (cont'd)

Public/Nonprofit Model

Similar to the public/private structure, the land is generally owned by a public entity and the facility is leased to and operated by a nonprofit organization. Operating entities under this structure often represent local sports associations that offer leagues from the developmental level up to elite travel teams. These organizations can be operated by parents and other area stakeholders with connections to their respective sport's regional and national offices and can facilitate the development or attraction of tournaments. The nonprofit is usually governed by a Board of Directors that provides oversight and accountability. While the Board of Directors provides objectives for the facility to accomplish, the management team is charged with formulating the best course of action to achieve the goals and objectives of the organization. The nonprofit entity seeks to leverage its relationships to develop strategic partnerships, expand programming and revenue-generating opportunities and share operating responsibilities. From a funding perspective, nonprofit organizations have access to grants that the public sector does not which can be used towards programming, construction costs, operating costs and/or capital improvements.

The nonprofit structure appears to work well with facilities that want the ability to solicit donations and volunteer labor hours. Annual sponsorships and other forms of ongoing support can be collected from the private or public sector, sometimes through a foundation. In many cases, donations are tax deductible.

Nonprofit status can also provide legal and/or tax advantages relative to other options. Because most nonprofit entities are dependent on external funding from private or public sources such as government grants and direct donations, ongoing funding is one of the challenges of a nonprofit entity. Any changes to the funding of the organization can impact the ability to hire and retain staff as well as sustain facility operations. The ability to secure the required volunteer labor pool on a regular basis can also be a challenge. Nonprofits are typically more effective when they have a dedicated source of funding.

Irrespective of the management approach utilized, a well-defined mission statement and booking policy can help reduce the potential for perceived differences in a facility's role by various stakeholders.

Market Assessment (cont'd)

It is our understanding that a primary objective of enhanced and/or new sports facilities in the County is to attract events that generate economic benefits associated with sports tourism. Based on the research conducted as part of this study, this section summarizes key market findings as well as building program elements that would better position the County to attract events that generate tourism and related economic impacts.

SWOT Analysis

Based on the market research and analysis conducted, the following summarizes strengths, challenges, opportunities and threats associated with enhanced and/or new sports facilities focused on increasing sports tourism in Clermont County.

Strengths/Opportunities

- Demand from potential user groups representing various sports
- Large population base within a 5-hour drive-time
- Amenities in the County and nearby Cincinnati
- Diversity of lodging options available
- Good vehicular access and proximity to a major airport
- Area sports participation levels
- Established marketing agency in the Clermont County CVB
- Opportunity to partner with established organizations such as F.C. Cincinnati for programming
- Opportunity to diversify tourism in the County and generate incremental new economic impacts
- Opportunity to better support recreational and competitive sports teams and leagues by providing quality spaces
- Opportunity to retain more of the community's discretionary spending in the County
- Youth sports have historically fared well during economic downturns
- Opportunity for new and/or improved facilities to serve as an economic catalyst

Challenges/Threats

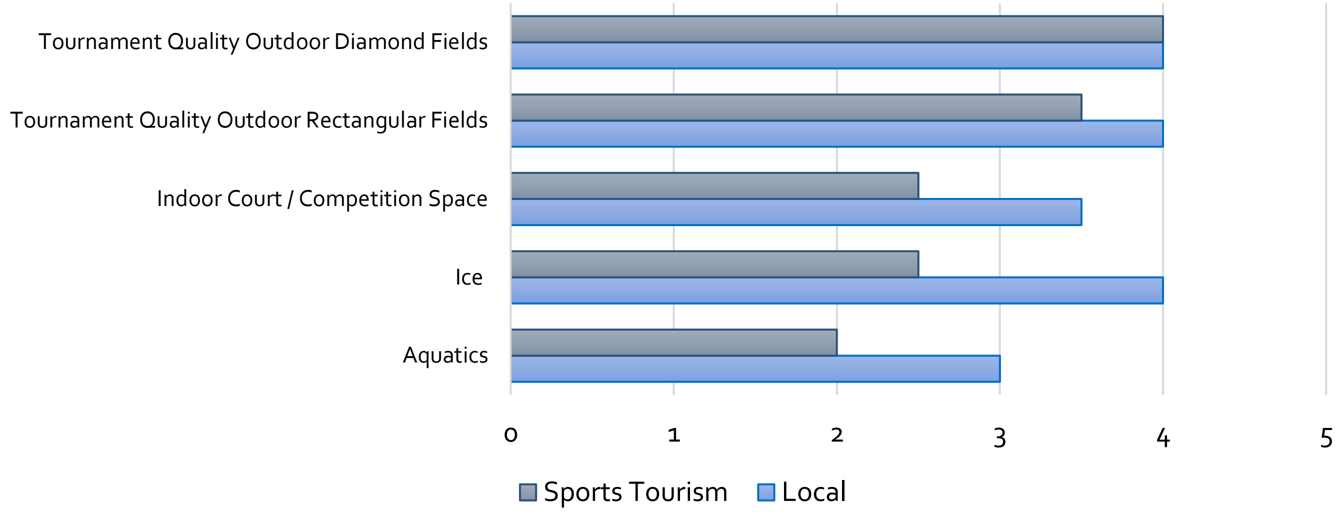
- County currently lacks tournament-quality sports facilities, especially outdoor facilities
- Most existing sports facilities in the County have significant deferred maintenance needs
- Most of the existing sports facilities do not operate with a focus of attracting events that generate economic impacts
- Surrounding counties have developed state-of-the-art facilities that place them at a competitive advantage in attracting sporting events
- Strong competition from existing regional and national sports facilities – both indoor and outdoor
- Potential oversaturation of sports-tourism facilities in the future
- Potential that some sport-tourism spending leaks outside of the County, given its proximity to attractions in Cincinnati
- Generally, similar sports facilities require an operating subsidy
- Funding for construction and ongoing operations
- Potential changes in general macro-economic conditions

Market Assessment (cont'd)

Market Demand

The following summarizes the relative level of market demand for various programmatic elements to increase sports tourism as well as better accommodate local demand. Each programmatic element was assigned a score from 0 to 5, with 0 representing the lowest opportunity and 5 representing the highest. The assigned score is based on the comprehensive research and analysis summarized in this report including the supply of existing facilities, insights gathered from interviews with representatives from local, regional, and national sports organizations, and discussions with local stakeholders. Additionally, factors such as the demographic and socioeconomic profile of the local and regional market, an analysis of competitive facilities, current industry trends, and best practices were considered.

As shown, tournament-quality outdoor rectangular and diamond fields appear to have the highest potential to generate tourism in the County. While indoor ice and aquatics facilities would better meet local demand, there is a lower opportunity to increase sports tourism. The following pages describe the rationale for each of these in more detail.



Market Assessment (cont'd)

Tournament Quality Diamond and Rectangular Fields

- While there is a significant supply of outdoor sports complexes in the region, user groups expressed that there is unmet demand and interest in utilizing new/improved outdoor facilities in the County.
- The existing outdoor facilities in the County generally do not meet the requirements of event organizers as they either lack a significant number of fields and/or are in significant need of improvements/repairs. The lack of quality outdoor sports fields limits the County's marketability to tournaments.
- Currently, most outdoor fields in the County operate with the objective of accommodating the recreational needs of the community, not generating tourism.
- New/improved outdoor fields could hosts tournaments in a diverse set of sports such as baseball, softball, lacrosse, soccer, football, rugby, etc.
- New and/or improved outdoor sports facilities could partner with local organizations such as F.C. Cincinnati for programming.
- In addition to attracting events that generate economic impacts, new and/or improved fields will better support the needs of local sports organizations and residents.
- The development of first-class outdoor fields will better position the County to attract events as well as retain the spending of its residents that is currently leaving the economy.

Indoor Courts/Competition Space

- The development of a new indoor court facility does not appear market supportable given the existing supply in the County and region.
- The County has existing indoor court facilities such as Elite Athletics, which is considered to be in very good condition and meets the court requirements of most user groups. The facility has a strong base of existing tournament activity.
- There is significant competition from well-established indoor facilities in the region. Spooky Nook is a major competitor with a strong reputation as a tournament destination. The facility is one of the largest in the country offering a significant number of courts and other amenities.
- Rather than build a new indoor court facility, which would compete with existing facilities, there is an opportunity to expand event business at existing assets with physical improvements.
- There are a diverse set of sports that can utilize flexible court space including basketball, volleyball, pickleball, wrestling, cheer/dance, etc.

Market Assessment (cont'd)

Indoor Ice

- While there is a gap in the local market for an ice facility, market research suggests facilities of this type would likely serve more of a local need rather than significantly increase sports-tourism.
- There are no existing ice facilities in the County. As such, residents seeking ice time are likely leaving the County for other facilities in the surrounding area.
- From a sports tourism perspective, there is a supply of existing facilities in the region which present competition.
- Many ice sports are seasonal, and while indoor facilities can operate year-round, tournament demand often declines in summer months. This seasonality could limit the consistent generation of tourism and economic impact compared to other sports complexes that host a range of activities year-round.
- Ice sports, while popular, generally attract less total attendance compared to other sports like baseball, soccer, basketball, etc.
- A single sheet of ice is not considered adequate to generate sports tourism. Users indicated a minimum of two ice sheets are required, with many users preferring three to four sheets. Facilities of this type are extremely capital-intensive and have significant ongoing operating costs.
- While a new ice facility would likely be highly utilized by the community, market research indicates the development of a new ice facility would generate a low to moderate increase in sports tourism in the County. Given the factors previously mentioned, the development of a new ice facility is considered a lower priority at this time from a sports-tourism perspective.

Aquatics

- Similar to ice, there is a gap in the local area for an aquatics facility; however, market research suggest it would serve more of a local need with limited opportunity to substantially increase sports tourism.
- Aquatics facilities have less flexibility to host a diverse range of events; they primarily serve swimming and diving competitions.
- There is competition from other existing facilities in the region for swim meets/competitions.
- Participation is lower than other sports such as baseball, soccer, basketball, etc.
- Facilities of this type have substantial operating costs and often operate at a deficit.

Market Assessment (cont'd)

Building Program Recommendations

Based on the market research conducted, the following provides building program recommendations for consideration that are focused on enhancing sports tourism. The development of these building program elements could be through a new build or through enhancement of an existing sports complex. It should be noted that development alone will not attract sports-tourism related events. Any improved/new facilities will need to be aggressively marketed and operated by a management team that prioritizes events that generate economic impacts and has established relationships with tournament organizers.

Concept	Diamond Field Complex (Priority 1)	Rectangular Field Complex (Priority 2)
Number of Fields	Minimum of 6 to 8 tournament-quality diamonds in a single location	Minimum of 10 to 12 tournament-quality rectangular fields in a single location
Playing Surface	Synthetic turf	Synthetic turf
Seating	Bleachers at each field	Bleachers at each field
Other Amenities	Lights at each field to extend usage time Robust Wi-Fi service that can support streaming Ample parking Concessions Restrooms Storage Warm-up spaces Pavilions/shaded areas Entertainment (e.g., playground, splash pad, etc.)	Lights at each field to extend usage time Robust Wi-Fi service that can support streaming Ample parking Concessions Restrooms Storage Warm-up spaces Pavilions/shaded areas Entertainment (e.g., playground, splash pad, etc.)
Approximate Required Acreage	Minimum of 36 acres	Minimum of 60 acres

Market Assessment (cont'd)

In addition, there are improvements to existing sports facilities in the County that would better accommodate the recreational needs of the community, as well as enhance marketability for tournaments that generate sports tourism. Based on the market research conducted as well as the facilities conditions assessment conducted by Convergence Design, the following summarizes these improvements. Again, it should be noted that improving these facilities alone will not drive sports tourism; facility management must prioritize and aggressively target these events.

Some of these facilities could potentially be improved/redeveloped to accommodate the building program recommendations shown on the previous page.

Facility - Indoor	Condition	Improvements
Elite Athletics	Very Good	Connect buildings so all courts are under one roof, reconfigure entrance and parking
Nothin' But Net Sports Complex	Fair	Address deferred maintenance, upgrade finishes, address safety concerns related to courts being higher than floor level

Facility - Outdoor	Condition	Improvements
Batavia Township Sports Complex	Good	Lights and turf fields
Finley Ray Park	Fair	Concessions, restrooms, paved parking, lights, replacing several fields with turf, entertainment (e.g., playground)
Mercy Health Training Center	Excellent	Additional turf field(s) with lights
Miami Meadows Park	Good	Lights and turf fields
Midland Baseball Complex	Good	Additional diamond fields with turf
Olympic Fields	Fair	Lights, turf fields, permanent restrooms, concessions, paved parking
Tealtown Ballpark	Fair	Update all fields and facilities

Comparable Facility Case Studies

Comparable Facility Case Studies

This section summarizes available data on various outdoor sports facilities that are considered comparable to that previously recommended. Data profiled includes ownership/management structure, building program elements and operating characteristics. This analysis offers context relative to physical and operating attributes at comparable facilities which is helpful in assessing market potential for the proposed facilities in Clermont County.

Information from these profiled facilities was obtained from direct interviews with management as well as secondary sources. The profiled facilities were selected based on their similarity in terms of market attributes, market focus and/or building program elements to that of the recommended building programs previously outlined.

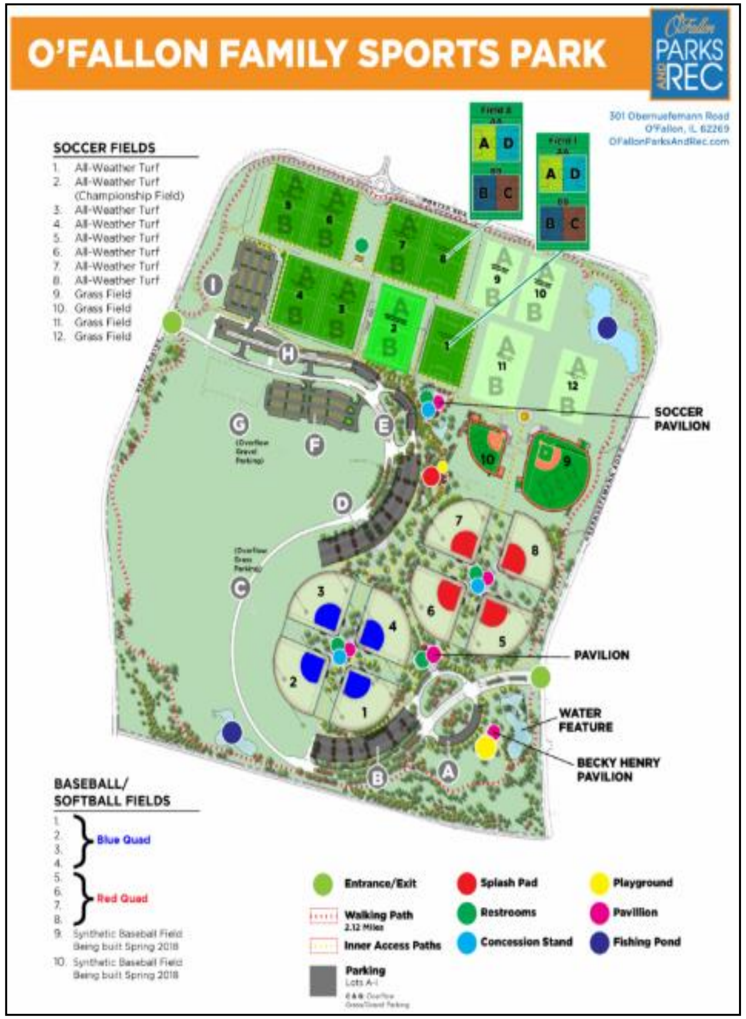
The following provides a list of facilities profiled in this section:

- Family Sports Park – O'Fallon, IL
- Scheels USA Youth Sports Complex – Appleton, WI
- Sports Force Park at Cedar Point Sports Center – Sandusky, OH
- Foley Sports Tourism Complex – Foley, AL
- Foley Sports Complex – Foley, AL
- Warren County Sports Park - Lebanon, OH
- Voice of America MetroPark– West Chester Township, OH
- Elizabethtown Sports Park, Elizabethtown, KY
- Bettis Family Sports Complex – Topeka, KS
- Future Champions Sports Complex – Jacksonville, IL
- Championship Park – Kokomo, IN
- Prospect Meadows – Marion, IA

Family Sports Park (O'Fallon, IL)

Owned and operated by the City of O'Fallon, Family Sports Park sits on 200 acres and was designed to accommodate exhibition games, tournaments, league games, special events, camps, clinics and recreational activities. The park features 10 diamond fields and 12 rectangular fields. Two of the baseball fields are all-weather synthetic, which includes a championship field. Of the 12 rectangular fields, eight are turf and four are natural grass. In addition to the fields, the park offers a 2.1-mile walking/running path, a splash pad and an all-weather synthetic playground.

The park historically hosts approximately 40 total events annually which primarily consist of soccer, lacrosse and baseball.



Scheels USA Youth Sports Complex (Appleton, WI)

Scheels USA Youth Sports Complex, which opened in August 2021, is owned by the City of Appleton and operated by United Sports Association for Youth, Inc., a non-profit organization run by a 13-member Board of Directors, including representatives from Wisconsin United Football Club, Cavaiani Baseball Training, and Appleton Little League. This organization is responsible for the management and operations of the entire sports complex. USA Youth leases 80 acres of land from the City, which features 15 rectangular fields, two little league diamonds and two full-size baseball diamond fields. The complex is recognized as a premier multi-purpose outdoor sports complex in the Midwest and annually hosts state, regional and national championship games. They also include all member organization events as well as the Neighborhood Beer Gardens hosted throughout the season. Operations of the complex rely heavily on volunteers.

Sports Force Park at Cedar Point Sports Center (Sandusky, OH)

Sports Force Park broke ground in April 2016 and was completed in 2017 through a partnership with Cedar Fair Entertainment Company, Lake Erie Shores & Islands, Erie County, the City of Sandusky, and Erie Metroparks. The outdoor complex is part of a larger development which also includes the 145,000 SF Cedar Point Sports Center. The indoor facility offers 10 basketball courts or 20 volleyball courts. Sports Facilities Management (SFM) operates the indoor facility while Ripken Baseball operates the outdoor fields.

The outdoor park spans 57 acres and offers eight rectangular fields and up to 12 diamond fields. Two diamond fields can fit on several of the rectangular fields, which helps accommodate large baseball/softball tournaments. The rectangular fields annually host tournaments in soccer, lacrosse and football, among others.

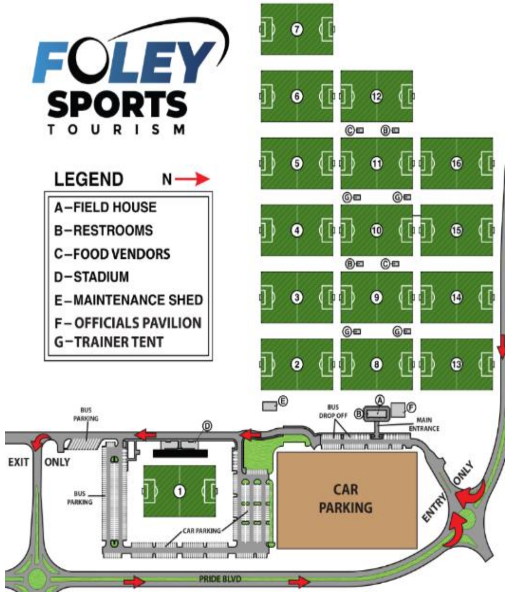
According to facility management, the fields annually hosts around 60 tournaments and 2,300 teams.

Foley Sports Tourism Complex (Foley, AL)

The Foley Sports Tourism Complex is owned by the City of Foley and operated by the Sports Tourism Department. The mission of the Sports Tourism Department is to attract, create and host high-quality events for all ages to increase economic vitality, improve quality of life and provide a unique and memorable experience that brands Foley as a nationally recognized sports destination.

The complex includes 16 grass rectangular fields with Tifton 419 Bermuda grass and Musco Sports Lighting, 4 concession pads, netting between fields, portable lacrosse goals, 2 flex rooms, and a training room. It also includes a championship field with Tifton 419 Bermuda Grass, seats up to 1,000 people, and equipped with lighting and a scoreboard. The complex also includes the indoor 90,000 sqft Foley Event Center with six basketball courts, 12 volleyball courts, and 12+ pickleball courts. Additionally, there's a children's playground (Foley Kids Playground), with a pavilion, scenic pond, and concession stand areas.

The complex is adjacent to the OWA which is a 520-acre entertainment and amusement park destination. The OWA features a 150-room hotel and various retail, dining and entertainment venues for visitors. The complex is also proximate to the Tanger Outlets, which consists of over 100 stores, and several beaches.



Foley Sports Complex (Foley, AL)

Foley Sports Complex, a 100-acre site, is owned by the City of Foley and operated by the Department of Recreation. The complex includes the Raymond C. Christensen Memorial Soccer Complex as well as the Ralph Schumacher Soccer Complex. There are 10 baseball and softball diamond fields and five rectangular soccer fields, all of which are lighted. Concessions are available at both the soccer and baseball/softball facilities. In addition, the complex features a covered registration pavilion and a private hospitality area, as well as multiple pitching or base distances.

The facility hosts clinics, local recreation leagues/teams, lessons and tournaments such as the USSSA Baseball World Series. The Recreation Department continues to align marketing and advertising efforts with Foley Sports Tourism to draw activity to the area.

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Warren County Sports Park (Lebanon, OH)

Warren County Sports Park is a 172-acre sports park located in Lebanon, Ohio. It is owned and operated by the Warren County Convention and Visitors Bureau. This facility was developed to primarily host tournaments that draw visitors to the area. The park is also used for sports practices, games, leagues, camps, and clinics.

The park has a West Wing, which features 18 ultimate rectangular fields, 12 which are multipurpose natural grass fields grouped into three quads of four. The West Wing also features concessions and a restroom building, a playground, walking trails, and parking for 1,200 cars. The East Wing features 6 baseball diamonds: 2 are synthetic, 120x80 yard championship fields with LED sports lighting and 4 natural grass baseball/softball fields grouped in one quad with two grass infields and two skinned infields, a concession stand and restroom building, walking trails, and parking for 800 cars.

The Warren County Convention and Visitors Bureau is currently looking to build a roundabout to aid traffic flow near the Ohio 741 site next to the complex as the popularity of this park grows. According to secondary sources, last year the park drew more than 1.2 million visitors which generated an estimated $95 million economic impact locally.

Voice of America MetroPark (West Chester Township, OH)

Voice of America MetroPark is approximately 490 acres. This facility is owned and operated by MetroParks of Butler County.

The complex features 25-multi purpose fields: 23 grass and 2 turf. In addition, the complex includes the 3,400 sqft U.C. Health Fieldhouse which has a trainer's room, press box, storage, restrooms, and concessions. There are also multiple practice fields, a 3-mile cross country course, and a cricket pitch.

The complex hosts a variety of sporting events including tournaments for soccer, baseball and softball, and lacrosse; leagues; clinics; camps; and fitness programs. Secondary sources report the complex hosts around 20 soccer tournaments annually, that draw more than 100,000 visitors. It was estimated that the park generates an economic impact of more than $22 million.

Elizabethtown Sports Park (Elizabethtown, KY)

Elizabethtown Sports Park spans over 158 acres and is owned by the City of Elizabethtown and privately operated by Sports Facilities Management (SFM), who was chosen by the Elizabethtown Tourism and Convention Bureau in 2019 to oversee daily operations, event booking, marketing and facility maintenance. The mission of the park is to make it the Midwest premier outdoor youth sports tournament destination by offering high quality services and facilities for visiting teams, coaches, and families.

This park offers 12 natural turf rectangular fields and 12 synthetic turf diamonds for baseball and softball, 2 of which are championship fields. The park also includes 3 large pavilions for ceremonies/events/meeting space, meeting rooms, locker rooms, stadium lawn seating, 3 miles of multi-model path, plaza/vendor areas, and playgrounds.

The park hosts tournaments, leagues, camps, clinics, youth soccer showcases, and lacrosse competitions. In recent years, management has developed their own tournaments to help maximize usage throughout the year. As of the latest data in 2022, the park has contributed $150 million in direct economic impact for the City of Elizabethtown over the last decade. The sports park generates approximately 160,000 visitors annually.

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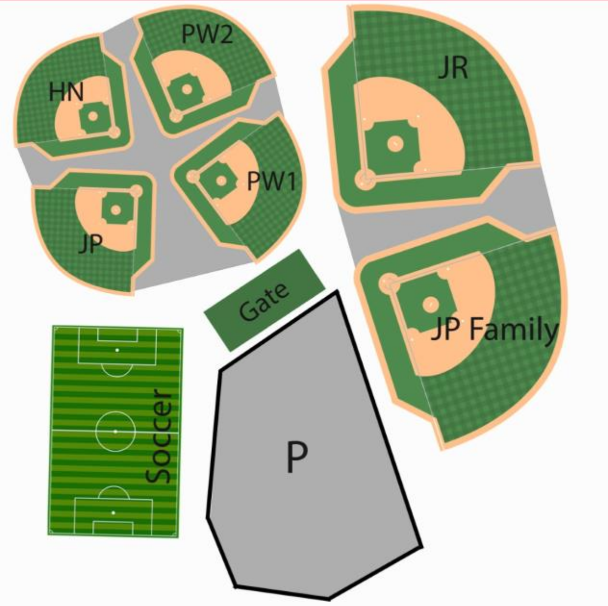
Bettis Family Sports Complex (Topeka, KS)

Bettis Family Sports Complex, located in Topeka on 22 acres of land, is a premier multi-use facility in the Midwest. It is owned and operated by Shawnee County Parks and Recreation. The facility has six lighted baseball diamonds with artificial turf infields and grass outfields and a single rectangular field. Other amenities include two concessions stands, restrooms, locker rooms, a plaza area, six offices, and conference rooms.

The complex has hosted state, regional, and national tournaments; minor league baseball; collegiate leagues; adult and youth leagues; clinics; etc. The fields are also used by Shawnee Heights High School's baseball and soccer teams.

Bettis Family Sports Complex Map



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Future Champions Sports Complex (Jacksonville, IL)

Future Champions Sports Complex is a 28-acre facility located in Jacksonville, Illinois. The facility is privately owned and operated. This complex features 6 lighted diamond turf fields. A newly renovated building was added which houses a restaurant, bar, arcade, and gaming area.

The complex primarily host youth baseball and softball tournaments and leagues from February through November. The Jacksonville Area Convention and Visitors Bureau estimates the complex's economic impact to be approximately $5 million annually.

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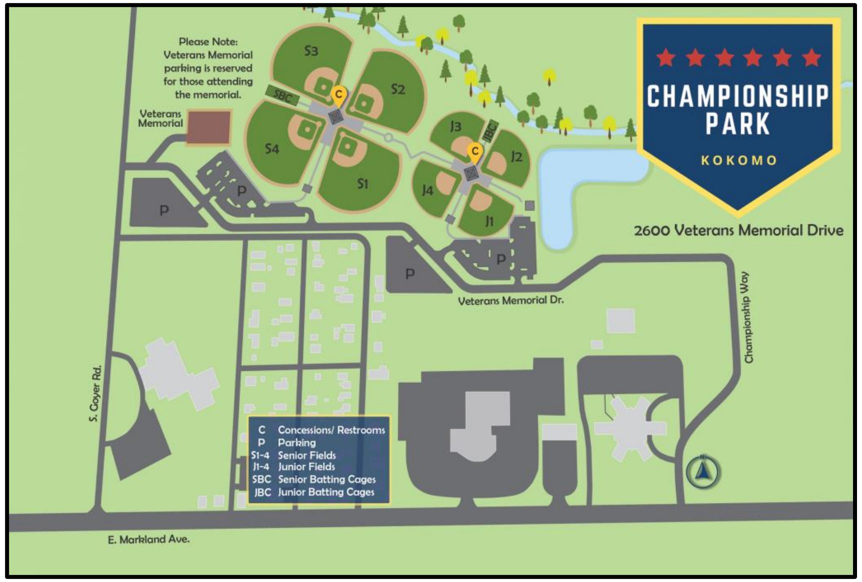
Championship Park (Kokomo, IN)

Championship Park consists of 34 acres and is owned by the City of Kokomo and privately operated. This facility is home to all the City's youth baseball and softball programs and hosts their tournaments as well as the USSSA Grand Park Showdown, among other tournaments. The park includes eight all-turf ball diamonds: four high school/college baseball fields and four junior/softball fields, each equipped with a brand-new state-of-the-art lighting system. Additionally, there are batting cages, two concession stands, two restrooms, and parking lots.

According to secondary sources, the park had an estimated total economic impact of $152 million in 2022. The complex generated over 580,000 total visits, with 37% of those visitors being out-of-market attendees. On average, each person visited the ballpark 2.2 times and stayed for about three hours. There were more than 2,000 room nights booked at local hotels during this time.



Prospect Meadows (Marion, IA)

Prospect Meadows sits on 128 acres of land north of Cedar Rapids and is owned and operated by the City of Marion Parks and Recreation. It opened in May 2019 and hosts baseball and softball tournaments, leagues, practices, and special events such as birthday parties, group outings, etc. There are eight ball diamonds with synthetic turf infields. The diamonds also feature natural grass outfields, portable baseball and softball bullpen mounds, softball pitching mats, a turfed bullpen catching area, adjustable base lengths, portable fencing for softball and youth baseball, and batting cages. The park has an additional field for the Kiwanis Miracle League. Plans are underway to build at least eight additional fields, which are expected to open within the next few years as part of Phase 2.

A recent study stated that Prospect Meadows generated more than $11 million in new spending and 24,200 hotel room nights in the area (approximately 3,000 rooms per month) in FY 2022.

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CONFIDENTIAL DRAFT – SUBJECT TO CHANGE

Development Concepts & Cost Estimates

CONFIDENTIAL DRAFT – SUBJECT TO CHANGE

Site Development Concept Plans

Based on the preliminary building program recommendations provided by Crossroads including development of an outdoor and rectangular field complex focused on attracting sports-tourism generating events, Convergence Design created several development concepts as well as associated cost estimates.

For rectangle sports, a 75-yard by 120-yard field dimension with minimum 10-foot overrun area is used as the basic planning module. For diamond sports, a full-sized baseball field with 320-foot dimensions down the foul lines is used for planning. All fields include spectator seating, and are assumed to be lighted, with artificial turf. Parking is planned at approximately 100 cars per field, although measured parking counts vary somewhat from this target. Site amenities typically include a pavilion structure for banquets and award ceremonies, restrooms and concessions, and a playground area for smaller children.

Site Agnostic Concept Plan | Diamonds

The adjacent concept illustrates two quads of four turf diamonds each for baseball and softball. This concept assumes a non-specified greenfield (undeveloped) site with favorable slope characteristics.

Total project costs to develop this concept are estimated to be approximately $30.5 million. This is an order-of-magnitude estimate and will depend on the timing of construction, the site selected, etc.

Site Agnostic | Diamonds				
Item Description	**Quantity**	**Unit**		**Project Cost**
Rectangular Multipurpose Playing Field	0	fields	$	-
Baseball Diamond-Full Size	8	diamonds	$	16,670,000
Softball/Youth Baseball Diamond	0	diamonds	$	-
Pavilion	1	buildings	$	1,230,000
Playground	1	area	$	520,000
Restroom/Concession Building	2	buildings	$	2,140,000
Restroom Building	0	buildings	$	-
Parking	879	spaces	$	2,700,000
Sitework, Grading & Drainage	65.0	acres	$	7,200,000
Total Project Cost	**8**	**fields**	**$**	**30,500,000**

Site Yield:

8	Baseball/Softball Artificial Turf Diamond
879	Parking
65	Acres (approx.)

Site Agnostic Diamonds Concept Plan

Site Agnostic Concept Plan | Rectangles

The adjacent concept illustrates 12 turf multi-purpose, rectangular fields on a hypothetical site of approximately 83 acres with favorable slope characteristics.

Total project costs to develop this concept are estimated to be approximately $35.5 million. This is an order-of-magnitude estimate and will depend on the timing of construction, the site selected, etc.

Site Yield:

12	Multipurpose Rectangle Artificial Turf Fields
1,175	Parking
83	Acres (approx.)

Site Agnostic | Rectangular

Item Description	Quantity	Unit		Project Cost
Rectangular Multipurpose Playing Field	12	fields	$	18,780,000
Baseball Diamond-Full Size	0	diamonds	$	-
Softball/Youth Baseball Diamond	0	diamonds	$	-
Pavilion	1	buildings	$	1,230,000
Playground	1	area	$	520,000
Restroom/Concession Building	2	buildings	$	2,140,000
Restroom Building	0	buildings	$	-
Parking	1175	spaces	$	3,610,000
Sitework, Grading & Drainage	83.0	acres	$	9,190,000
Total Project Cost	**12**	**fields**	**$**	**35,500,000**

Site Agnostic Diamonds Concept Plan

CROSSROADS CONSULTING
CONVERGENCE DESIGN

Cost Estimates | Existing Facility Upgrades

As mentioned in the market analysis, there is an opportunity to improve existing facilities throughout the County to enhance marketability for sports tourism events. If redeveloped, some of these facilities, such as Tealtown Ballpark and Finley Ray Park could accommodate the building program recommendations previously outlined.

For informational purposes, the adjacent table provides order-of-magnitude cost estimates intended to present realistic budget targets for the renovation or upgrading of existing sports facilities in Clermont County. The Site Total Project Cost shown is inclusive of design fees, a 10 percent contingency, and an allowance for needed loose equipment to go along with the proposed upgrades. Costs are in current dollars and should be escalated to the anticipated year of construction.

As it relates to the outdoor facilities improvements, the cost estimates assume lighted artificial turf fields, which are the primary driver of total cost. A less costly approach to renovation would keep natural grass fields in place, which would lower the overall project cost substantially, but would also be less usable for sustained tournament play, in some instances taking a venue out of contention for some tournaments.

Site	Description	Site Total Project Cost
Batavia Township Park	Lighted artificial turf fields	$ 18,200,000
Finley Ray Park	Turf, lighting, structures	$ 35,800,000
Flash Baseball Complex	Artificial turf fields & Paved Parking	$ 20,700,000
Elite Athletics	Connect buildings & Reconfigure Parking	$ 2,200,000
Mercy Health FC Cincinnati Training Complex	Lighted artificial turf fields	$ 1,600,000
Miami Meadows Park	Lighted artificial turf fields	$ 21,900,000
Midland Baseball	Lighted artificial turf fields	$ 2,100,000
Olympic Fields	Turf, lighting, structures	$ 15,300,000
Nothin' But Net Sports Complex	Renovation	$ 9,000,000
Tealtown Ballpark	Turf, lighting, renovate bldgs.	$ 24,000,000
West Clermont High School	Lights	$ 600,000

Source: Convergence Design

Potential Funding Options

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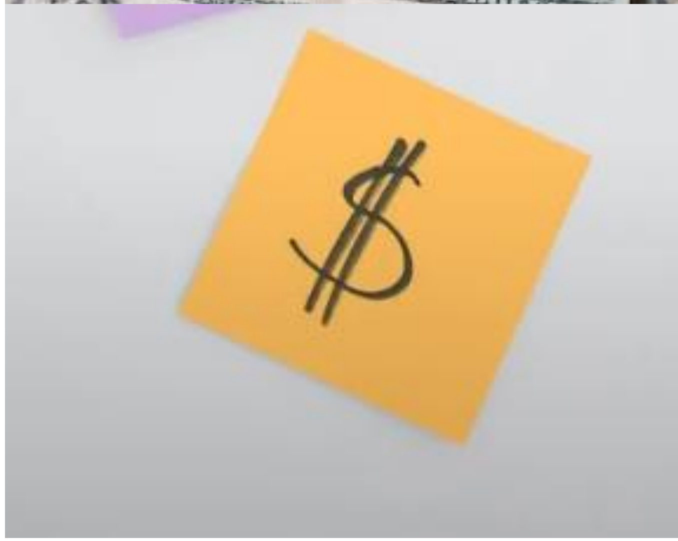
Potential Funding Options

Research was gathered regarding the types and sources of funding that have been leveraged for similar facilities. The purpose of this analysis is not to generate a financing plan for facility development, but rather to discuss certain financing vehicles, as well as public and private revenue sources that could potentially be utilized to fund development of enhanced and/or new sports facilities.

Youth/amateur sports complexes and other comparable facilities across the U.S. have used a variety of financing approaches and sources of funding to construct their venues and make other improvements. This section provides an overview of traditional financing instruments and funding sources used by similar facilities. Each of these financing options may impact owners differently, due to differing cost structures, tax implications, cash flow considerations, and other unique circumstances. Although the various alternatives presented in this section represent common forms of financing, not all of them may be appropriate for this project. Local and State laws, fiscal sources, debt issuance capacity of governmental entities for bonding purposes, and public support may influence the ability to use any one of these financing methods or funding sources.

Youth/amateur sports complexes have been traditionally financed with a variety of public and private funds. Public-private partnerships are often utilized for large-scale developments and professional sports facilities, but this approach can and has been adapted for youth/amateur sports facilities as well. Similarly, naming rights, which have long been prevalent to generating revenues for large-scale professional sports stadiums and arenas, are now becoming more commonplace for youth/amateur sports facilities across the country and provide an additional revenue stream that can be used to help fund construction and/or ongoing operations. However, in many instances, the primary source of underwriting for debt service on construction is still largely derived from public sources.



Financing Instruments

An overview of traditional financing instruments utilized by youth/amateur sports facilities and other comparable facilities is provided in the following paragraphs. These financing instruments may or may not be applicable to the proposed improvements in Clermont County.

Revenue Bonds - Revenue bonds are issued by municipalities and represent special obligations secured by one or more defined revenue sources. Most revenue bonds are based on a pledge of a dedicated revenue source such as facility revenues, hotel occupancy tax, admission tax, food and beverage tax, sales and use tax or various other special assessments. The use of special purpose tax levies represents a means by which capital costs may be linked with recurring benefits and is typically directed at those individuals and sectors of the local economy which directly benefit from the facility(s) such as hotel room night stays, food, and/or alcohol sales, and other area spending. Generally, revenue bonds do not require voter approval. Another primary advantage of revenue bonds is that the issue need only pledge specific revenues and not the full faith and credit of the issuer. However, because of this, revenue bonds can require a higher interest rate than general obligation debt.

General Obligation Bonds - General obligation bonds issued by the city, county or state government are backed by a pledge of ad valorem taxes of the issuer. As the tax base and taxing authority of the government are pledged to the repayment of the bonds, these types of bonds typically have the lowest interest of all forms of bond financing. Interest rates vary based on a variety of factors including the existing bond indebtedness and credit rating of the issuer. A disadvantage of using general obligation bonds is that the overall bond capacity for the issuing municipality is reduced. General obligation bonds issued by a city, county or by some state governments have to be coordinated with other government needs and financing plans, and they typically require voter approval through a public referendum. Garnering public support and securing voter approval is often a costly and time intensive process.

Financing Instruments (cont'd)

Certificates of Participation – Another, although less common, funding alternative is the use of Certificates of Participation (COPs). Unlike general obligation or revenue bonds, this financing method does not legally pledge government money for debt service. COP holders are repaid through annual lease appropriations by the sponsoring government agency. As this approach does not legally commit taxpayers over a long-term, these funds can typically be obtained without voter approval. Further, COPs are not subject to various other statutory requirements applicable to bonds, including interest rate limitations, competitive sales requirements, and semi-annual or fixed-rate interest payment requirements. Therefore, a government agency can structure deals in a timely manner based on favorable financial market conditions. On the other hand, because funds are not legally pledged beyond annual appropriations, COPs typically have a higher cost of debt in comparison to traditional bond issuances.

Tax Increment Financing (TIF) – This type of financing is secured by a pledge of net increases in property and/or sales and use tax resulting from the development of an area within a defined development district. These development districts may have different focuses including commercial, industrial, or tourism, among others. Success for this type of financing is contingent upon a development district being established and a strong market driven development atmosphere that would provide a constant source of new privately owned and financed projects within the district. This technique can be particularly useful in addressing infrastructure improvements needed for the construction of facilities.

Traditionally, pledging increases in property taxes has been the most prevalent method utilized for this type of financing. However, other forms of special taxes can be leveraged such as a temporary or permanent tax in a district for businesses that benefit from the development, which in the case of a new sports facility could include incremental hotel, food & beverage, or other tourism-related taxes. With the growth in sports tourism across the country, many cities and counties have developed Tourist Improvement Districts (TIDs) to establish special self-assessments on tourism-related businesses to generated dedicated revenue for facility development and improvements as well as operational support. Additionally, these TIDs can help to foster enhanced public-private partnerships for these types of developments.

Types of Funding Sources

Sources of funding are usually defined as one of two types: one-time or recurring. The most common one-time source of funding is a grant or cash contribution. However, most funding sources are recurring in nature and include, but are not limited to, the following:

Funding Sources	
Equity Contributions	American Rescue Plan Act
Facility/Admission Fees	Prepared Food/Restaurant Tax
Facility use agreements	Property Tax
Local, State and Federal Grants	Sales and Use Tax
Naming Rights	State and Local Appropriations
Vendor Rights	Tax Increment Revenue
	Tourism Improvement District Assessments
	Tourist Development/Lodging Tax

Traditionally, these sources are paid into a fund account or are in some way dedicated or committed to the retirement of annual debt incurred through a particular financing medium. Many of the sources outlined above represent fiscal sources under the control of local and/or state government. Generally, facilities developed by local and/or state governments rely on fiscal sources such as sales tax, lodging tax, admissions tax, food and beverage tax, or various redevelopment rebates. Increasingly, local governments have been able to capitalize on special funding that may require approval at the state level (e.g., changes in taxes imposed, rebates for collections within local jurisdictions or amounts on existing taxes) to assist in their project. In some instances, this may require approval of the State Legislature.

Types of Funding Sources (cont'd)

Grant opportunities at all levels represent supplemental funding that is potentially available at both planning and construction phases. Grants typically have specified use cases/objectives and often require a competitive solicitation process, but the following may represent potential sources to supplement funding needs.

- Land and Water Conservation Fund
- Community Development Block Grant
- National Recreation and Park Association Grants
- US Environmental Protection Agency
- USDA
- AARP Community Challenge Grant Program
- Ohio Department of Natural Resources Grants
- Ohio Cultural Facilities Commission Grants
- Ohio Parks and Recreation Association Grants
- NatureWorks Grant Program
- Clermont County Park District Grants

All potential grants are contingent on factors such as changes to the Federal and State grant programs (including eligible projects, applicants, and most of all funding levels each cycle) and State of Ohio budget changes, among others.

In addition, funding for a portion of the construction costs could potentially be addressed by private donations/endowments. Fundraising, while typically representing a relatively small portion of funding for construction projects and major improvements, also helps to build community support and awareness, which can both broaden and benefit other funding initiatives. Naming rights also provide an opportunity for an additional revenue stream that can be used to help fund construction and/or ongoing operations. Similar outdoor complexes in the U.S. have received naming rights generating between approximately $75,000 and $200,000 annually.

Other communities who have undergone similar development projects have stressed the importance of harnessing multiple partners, leveraging a variety of public sources and private capital to create a viable funding plan. As the development plan enhanced/new sports facilities and funding requirements progresses, it will be necessary to consider both the advantages and potential restrictions of any funding partnership and to actively pursue and evaluate all potential funding sources.

Funding Strategy Case Studies

Research was conducted to identify examples of funding sources utilized by comparable developments throughout the region in connection with new projects and renovations/expansions to existing facilities, as well as other recent examples for select venues throughout the country to highlight a variety of different funding strategies. The data and information compiled in this section is based on publicly available research including press releases and articles, venue websites, municipal planning documents, governmental budgets/financial reports, and legislation.

Warren County Sports Park

Location: Lebanon, OH

Owner: Warren County CVB/Port Authority

Operator: Warren County CVB

Fields: 18 rectangular, 6 diamond

Other Amenities: Concessions, Walking trails, etc.

- **Construction of the $16 million Warren County Sports Park, which was completed in 2020, was funded through a bond issued by the Warren County Port Authority, which is a County financing agency created by the Commissioners. The Warren County Port Authority owns the land and is responsible for bond payments, which are covered by a 4% lodging tax.**
- **No money from the County's general fund was used to develop the park.**

Voice of America Park

Location: West Chester, OH

Owner: MetroParks of Butler County

Operator: MetroParks of Butler County

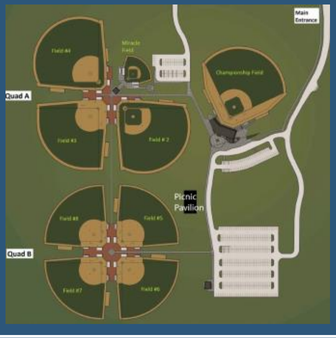
Fields: 25 rectangular

Other Amenities: Fieldhouse, Concessions, Dog park, Gazebo, Playground, Meeting rooms, etc.

- **The construction of the sports fields at Voice of America Park was funded with $3 million from the County budget, a $1 million grant from the Ohio Department of Natural Resources and approximately $1 million from donations and sponsorships from local businesses and organizations. Construction of the fields was completed in 2014.**
- **In 2018, the 3,400 SF, $3.2 million Fieldhouse was developed, which was paid for through MetroParks funds, a $1 million partnership with UC Health and a $0.5 million capital grant from the State of Ohio.**

Funding Strategy Case Studies (cont'd)

Meijer Sports Complex



Location: Rockford, Michigan

Owner: West Michigan Sports Commission

Operator: West Michigan Sports Commission

Fields: 8 diamonds

Other Amenities: Pavilion, Concessions

- **Meijer Sports Complex was initially constructed for $7.5 million in 2014 through private donations.**
- **This outdoor baseball and softball tournament complex launched a major capital campaign in 2022 to fund a planned $13 million expansion and renovation of the grounds. The campaign, which is being run by the West Michigan Sports Commission, a 501(c)(3) nonprofit established to foster economic development by attracting sporting events to the area, raised approximately $12.5 million towards its $13 million goal through a $3 million Community Enhancement Grant from the State of Michigan private donor events, golf outings/luncheons, and other fundraiser events and activities. The project is expected to be completed in October 2025.**

Scheels Sports Park at Legacy Pointe

Location: Springfield, IL

Owner: Private

Operator: Private

Fields: 8 multi-purpose, configurable fields

Other Amenities: 190,000 SF Indoor sports dome

- **The $67 million project, which features an indoor and outdoor sports complex, is currently under construction and scheduled to be completed in 2025. The development of the sports park is being funded through a public-private partnership with the City contributing approximately 50% of the funding through local hotel-motel tax and sales tax contributions and the remainder being funded by the developers, other private investors, and donations.**

Funding Strategy Case Studies (cont'd)

Elizabethtown Sports park

Location: Elizabethtown, KY

Owner: City

Operator: Private

Fields: 12 rectangular, 12 diamond

Other Amenities: Offices, Meeting rooms, Locker rooms, Playgrounds, etc.

- **Elizabethtown Sports Park was developed at a cost of $31 million in 2012, which was bonded against the City's 2% restaurant tax which generates approximately $2.0 million annually.**

Publix Sports Park

Location: Panama City Beach, FL

Owner: City

Operator: Private

Fields: 13 configurable

Other Amenities: Concessions, Locker Rooms, Lounge, etc.

- **This $37.0 million park was developed through a partnership between Bay County, Panama City Beach Convention and Visitors Bureau and a private developer. The developer donated the land. Bonds were issued by the Panama City Beach Convention and Visitors Bureau, which dedicated lodging tax revenue to support debt services and operations.**

Funding Strategy Case Studies (cont'd)

Rantoul Family Sports Complex

Location: Rantoul, IL

Owner: Village of Rantoul

Operator: Village of Rantoul

Fields: 8 rectangular, 8 diamond

Other Amenities: Offices, Playground, Concessions, etc.

- **This $20 million outdoor sports facility was completed in 2021. The project's construction was funded primarily by bonds covered by income from the City's tax increment financing fund and supplemented by a combination of private contributions, sponsorships, and grants.**

Rocky Top Sports World

Location: Gatlinburg, TN

Owner: City/County

Operator: Private

Fields: 7 rectangular

Other Amenities: 86,000 SF Indoor Court Facility, Concessions, etc.

- **The $22 million indoor and outdoor multipurpose venue, which opened in 2014, was funded through a joint venture agreement between the City and the County. Under the terms of the agreement, the City provided 70% of the development cost by issuing bonds and the County contributed the balance utilizing bonds and grants.**

Funding Strategy Case Studies (cont'd)

Crown Point Sportsplex

Location: Crown Point, IN

Owner: City

Operator: City

Fields: 9 diamond, 2 rectangular

Other Amenities: Playground, Concessions, Walking path, etc.

- **Construction of this complex was completed in 2011 at a cost of approximately $4 million. Funding was secured from the City's Redevelopment Commission, tax from a bond issue and the Dean and Barbara White Foundation. The City recently invested $1.0 million to develop turf infields.**

Foley Sports Complex

Location: Foley, AL

Owner: City

Operator: City

Fields: 10 diamonds, 5 rectangular

Other Amenities: Pavilion, Concessions, Hospitality area, etc.

- **Development of the Foley Sports Complex was primarily through a bond issued by the City. The bond's repayment is through sales and lodging taxes.**

Economic Analysis

Economic Analysis

One of the primary reasons that some communities develop these types of facilities is the economic activity that they can generate in terms of spending, employment and labor income, as well as tax revenues to local and state governments. These facilities typically attract events that draw patrons from outside of the immediate market area who spend money on hotels, restaurants, retail, entertainment, transportation and other related services. Consequently, when evaluating the merits of these types of projects, both costs and benefits such as operating requirements, debt service and economic benefits should be considered.

Crossroads assisted the CVB in developing a hypothetical, order-of-magnitude estimate of economic and fiscal impacts generated from ongoing operations of the recommended outdoor sports facilities.

While there are several options for development, including the redevelopment of an existing sports facility, this analysis is not site specific, other than the assumption that the facilities will be in the County and have excellent vehicular/air access and proximity to amenities such as hotels, restaurants, retail, etc.

General Assumptions

This analysis is based on certain hypothetical assumptions pertaining to the building program, ownership/operating structure, usage levels and other related operating strategies which are outlined below. It should be noted that these assumptions are preliminary and should continue to be refined as decisions related to the building program, site location and other operating characteristics evolve.

- The recommended building program for the outdoor sports facilities is developed.
- The site for the proposed facilities is proximate to amenities including hotels, dining, retail, entertainment, etc. and have adequate ingress/egress and parking.
- The facilities will be designed and constructed to attract high-quality tournaments/competitions.
- The facilities will be operated by a professional management organization that specializes in marketing and management of similar sports facilities and has established contacts and strong relationships with sporting event promoters and producers.
- The facilities will be marketed by both facility management and established tourism agencies such as the CVB.
- The facilities will be available for local play but events that generate room nights and economic impact will be prioritized.
- The facilities will be operated in a manner that provides a consistent, high-level of customer service.
- There will be appropriate lead time for event booking and sales prior to opening.
- Area hotels will actively support sports tourism initiatives.
- With exception to the facilities noted earlier in this report, no other similar competitive facilities are built/expanded in the region.
- No major economic fluctuations, acts of nature, or cataclysmic events such as an epidemic occur that could adversely impact the dynamics of the project.

General Assumptions (cont'd)

Event activity at new facilities typically experiences a "ramp up" period to a stabilized level of activity which occurs for several reasons. For instance, some groups that book their event years in advance may not want to risk that a facility's construction is delayed and not completed in time for their event. In addition, some groups may choose to let management "fine tune" its operations before hosting an event at the facility. Typically, the first two years of operations serve as a build-up period, allowing appropriate lead times in booking events and time to establish a reputation in the sporting event market. The length of time for venues to reach stabilized operations varies but generally occurs in or around year three.

Overall utilization at any facility is typically dependent on several factors such as market attributes; size, configuration and quality of the facilities offered; effectiveness of the management team and its partners in booking the facility; date availability; cost; etc. and is rarely consistent. For instance, a new facility may attract more baseball tournaments one year and more softball tournaments in another year.

The following describes event types used in this analysis:

- Tournaments include multi-day youth and adult competitions in a variety of sports. These events can be created internally by facility management or by sports organizers and include teams from throughout the State, the surrounding region, the U.S. and/or international destinations.
- League activity includes elite (or travel) club sport play (both games and practices) and recreational play for youth and adults in multiple sports. League play will generally occur during the weekdays, last for multiple weeks and can augment league activities occurring at existing facilities.
- Camps and clinics can be organized by different entities such as professional sports teams/athletes, colleges/universities, sports organizations, etc. and are designed to teach and improve skills and strategy. They are typically organized by age groups and skill level. This type of activity is anticipated to occur during non-peak periods over multiple days and can serve to grow existing athletic programs in the area.

General Assumptions (cont'd)

As shown in the adjacent tables, the proposed diamond outdoor field complex is estimated to host 26 tournaments that attract 192,220 total attendee days (defined as total attendance multiplied by event length) in a stabilized year of operation which is expected to occur in year three. This activity is estimated to generate 28,030 net new room nights annually in the County.

The proposed rectangular field complex is estimated to host 22 tournaments that attract 171,220 total attendee days in a stabilized year. This activity is estimated to generate 23,420 net new room nights annually in the County.

It is anticipated that the proposed facilities will benefit the community by accommodating local sports activities during non-peak times. It is estimated that the proposed outdoor diamond field complex will host 81,000 participant days annually associated with non-tournament activities such as leagues, camps, clinics, etc. and the proposed rectangular field complex will host 110,000 participant days annually.

Estimate of Annual Usage & Room Nights - Proposed Diamond Field Complex

Category	Year 1	Year 2	Year 3	Year 4	Year 5
Tournament Activity					
Small Tournaments	5	5	8	8	8
Medium/Large Tournaments	10	15	18	18	18
Total Events	15	20	26	26	26
Total Number of Participants and Spectators	38,850	57,820	77,140	77,140	77,140
Total Participant and Spectator Attendee Days	92,050	143,220	192,220	192,220	192,220
Net New Room Nights (County)	10,850	20,520	28,030	28,030	28,030
Other Event Activity (Leagues, camps, clinics, etc.)					
Total Participant Days	66,000	72,000	81,000	81,000	81,000

Estimate of Annual Usage & Room Nights - Proposed Rectangular Field Complex

Category	Year 1	Year 2	Year 3	Year 4	Year 5
Tournament Activity					
Small Tournaments	6	8	9	9	9
Medium/Large Tournaments	6	9	13	13	13
Total Events	12	17	22	22	22
Total Number of Participants and Spectators	32,900	50,400	69,720	69,720	69,720
Total Participant and Spectator Attendee Days	75,530	120,540	171,220	171,220	171,220
Net New Room Nights (County)	7,360	14,620	23,420	23,420	23,420
Other Event Activity (Leagues, camps, clinics, etc.)					
Total Participant Days	71,000	91,000	110,000	110,000	110,000

Economic Impact Analysis

Based on the market analysis conducted for this study including the estimate of utilization and related assumptions previously shown, this section estimates the net new economic and fiscal benefits associated with operations of the proposed new sports facilities.

If built, the local economy could benefit from ongoing operations of the proposed new facilities, including the following tangible and intangible benefits.

- Generating additional economic activity in terms of spending in the area economies as well as associated jobs and labor income
- Offering first-class indoor and outdoor sports facilities for County residents and visitors
- Improving the overall quality of life and livability of the area
- Growing and retaining commerce in the area
- Attracting visitors to help support area businesses
- Leveraging public investment to serve as a catalyst for other potential development initiatives

Each of these benefits are important in assessing the overall benefit that the proposed sports facilities may have on the area. While the value of many of these benefits is difficult to measure, the economic activity generated can be quantified.

Economic Impact Analysis - Methodology

Regional input-output models are typically used by economists as a tool to understand the flow of goods and services among regions and measure the complex interactions among them given an initial spending estimate.

Direct Spending

Estimating direct spending generated from the proposed sports facilities is a key input in the economic impact model. Direct spending represents the initial change in spending that occurs as a direct result of operations. An attendee eating at a local restaurant before an event is an example of direct spending.

An assessment of the economic impacts can be approached in several ways. This analysis utilizes estimated order-of-magnitude expenditures related to facility operations such as salaries/wages, utilities, repairs & maintenance, general administrative costs, etc. as well as attendee spending outside of the proposed facilities before and after events at hotels, restaurants, bars, gas stations, retail stores, etc. as an initial measure of economic activity in the County.

Attendee spending outside the proposed facilities is generated from 1) local attendees who reside in the County 2) day trippers who likely originated from outside the area who travel to and from the proposed new facilities for events and 3) attendees who originated outside the area and stayed overnight. Each group was assigned different per capita spending amounts based on data provided by the client and industry research from sources such as Tourism Economics and other secondary research. Spending by local attendees was excluded to calculate net new spending.

Not all direct spending directly impacts the County economy. To estimate the net new economic impact, adjustments were made to gross direct spending to account for displacement (i.e., spending that would have occurred elsewhere in the County without the presence of the proposed facilities and leakage (i.e., spending that occurs outside the County). Further, this analysis accounts for retail margins (i.e., the difference between retail purchaser price and the producer price) and the percentage of goods purchased within the County.

In reality, while it is likely that a portion of attendee spending would be displaced or would have occurred somewhere in the local economy if the event had not been held, it is also reasonable to assume that attendees may not make the same level of purchases in the economy if the event had not occurred and may even spend money attending sports activities outside the local area. As such, the estimate associated with attendee spending outside the proposed new facilities reflects a conservative approach.

The estimated net new direct spending amounts were then allocated to specific industry codes such as lodging, food & beverage, entertainment/recreation, transportation and retail.

Economic Impact Analysis – Methodology (cont'd)

Multiplier Effect

Additional economic impacts are produced through the re-spending of direct spending. To quantify the inputs needed to produce the total output, economists have developed multiplier models. The estimation of multipliers relies on input-output models, a technique for quantifying interactions between firms, industries, and social institutions within a local economy. This analysis uses IMPLAN software and databases which are developed under exclusive rights by the IMPLAN Group, LLC. IMPLAN, which stands for Impact Analysis for Planning, is a computer software package that consists of procedures for estimating local input-output models and associated databases. The IMPLAN software package allows the estimation of the multiplier effects of changes in final demand for one industry on all other industries within a defined economic area. Currently, there are hundreds of licensed IMPLAN users in the U.S. including universities, government entities and private companies.

The economic data for IMPLAN comes from the system of national accounts for the U.S. based on data collected by the U.S. Department of Commerce, the U.S. Bureau of Labor Statistics, and other federal and state government agencies. Data is collected for over 500 distinct producing industry sectors of the national economy corresponding to the Standard Industrial Classifications ("SICs"). IMPLAN's proprietary methodology includes a matrix of production and distribution data among all counties in the U.S. As such, the advantages of this model are that it is sensitive to both location and type of spending and can provide indirect and induced effects, employment and earnings information by specific industry category while considering the leakages associated with the purchase of certain goods and services outside the economy under consideration.

Once the estimated direct spending amounts are assigned to an appropriate industry category, the IMPLAN model estimates the economic multiplier effects for each type of direct spending attracted to or retained in the County economy resulting from the proposed facilities. The total output multiplier is used to estimate the aggregate total spending that occurs beginning with direct spending and continuing through successive rounds of re-spending which are generally referred to as indirect and induced effects on the area economy.

Indirect and Induced Impacts

Indirect impacts reflect the re-spending of the initial or direct expenditures, or the business-to-business transactions required to satisfy the direct effect (e.g., impacts from non-wage expenditures). For example, an attendee's direct expenditure at a restaurant requires the restaurant owner to purchase food and items from suppliers. The portion of these restaurant purchases that are spent within the area economy are indirect impacts.

Induced impacts reflect changes in local spending by households on goods and services that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures). For instance, a server at a restaurant could have more personal income due to an attendee's visit to the restaurant. The amount of increased income that the employee spends in the area economy is an induced impact.

The model generates estimates of these impacts through a series of relationships using average wages, prices and transportation data, considering commute patterns and the relative interdependence of the economy on outside regions for goods and services.

As described above, Indirect and induced impacts are commonly referred to as multiplier effects.

Economic Impact Analysis – Methodology (cont'd)

Total Economic Impact

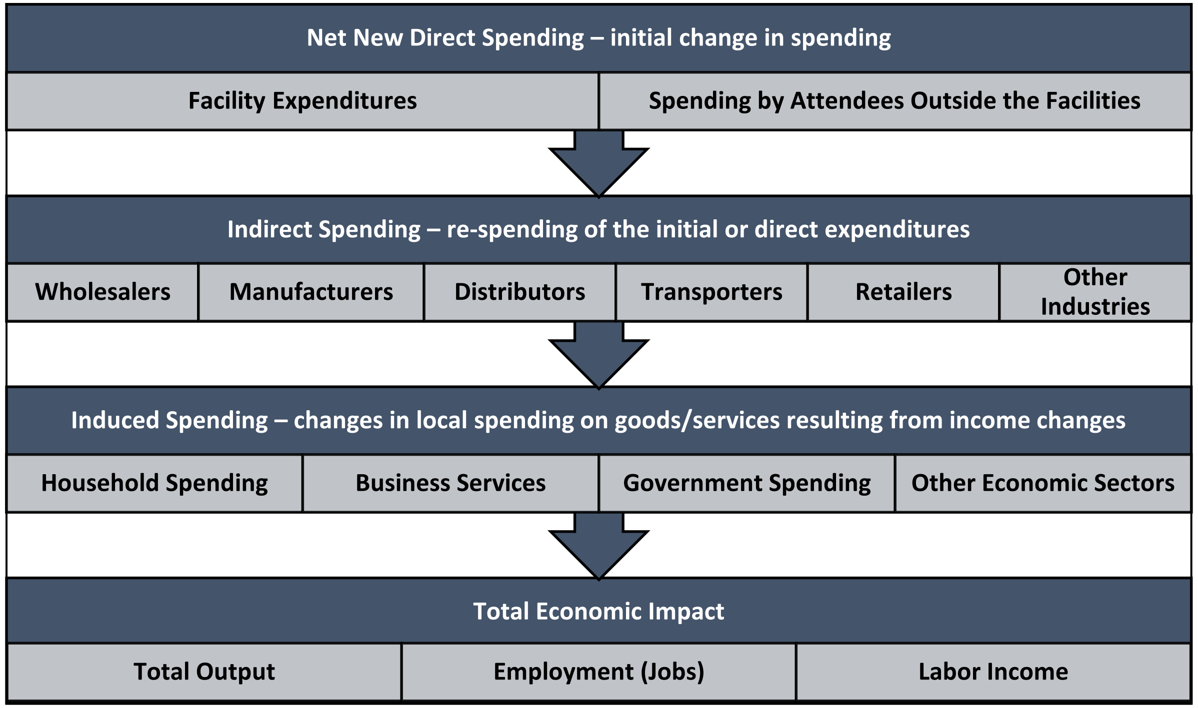
The calculated multiplier effect is then added to the direct impact to quantify the total economic impact in terms of output, employment and labor income which are defined as follows:

Total Output is a measure of the total estimated value of the production of goods and services supported by operations of the proposed facilities. Total output is the sum of all intermediate sales (business to business) and final demand (sales to consumers and exports). This calculation measures the total dollar change in spending (output) that occurs in the economy for each dollar of output delivered to final demand.

Employment (Jobs) represents the number of full-time and part-time jobs that are supported by operations of the proposed facilities. The employment multiplier measures the total change in the number of jobs supported in the economy for each additional $1.0 million of output delivered to final demand. It should be noted that a person can hold more than one job, so the total number of jobs is not necessarily the same as the number of employed people. Further, the total number of jobs does not only reflect employees working at the proposed facilities but rather the total number of jobs that are directly and indirectly supported on an annual basis in multiple sectors of the economy due to the ongoing operations of the proposed facilities.

Labor Income represents the wages and salaries earned by employees of businesses associated with or impacted by operations of the proposed facilities. In other words, the multiplier measures the total dollar change in earnings of households employed by the affected industries for each additional dollar of output delivered to final demand.

The adjacent graphic illustrates the multiplier effects for calculating total economic impact.



Fiscal Impact Analysis - Methodology

The estimated spending generated from the proposed facilities also produces tax revenues for the local and State economies. Experience in other markets suggests that while a significant portion of the direct spending will likely occur near the proposed sports facilities, additional spending occurs in other surrounding economies.

IMPLAN was used to estimate the annual taxes generated from ongoing operations of the proposed sports facilities. While not all inclusive, the list below summarizes the various taxes included in the IMPLAN model.

- *Local Lodging Tax* – Clermont County imposes a tax on all transient guests occupying a room or rooms with sleeping accommodations in a lodging establishment. The tax rate is 7% of which 3% is returned to the municipal corporations and unincorporated areas in the county that have hotels but do not levy a separate lodging tax; 3% is distributed to the Clermont County Convention and Visitors Bureau; and 1% is for construction, improvement, or maintenance of professional sports facilities in Clermont County.

- *Local Sales Tax* – Clermont County applies sales tax to the sale, rental, and lease of tangible personal property and certain services, unless the transaction is specifically exempt. The tax rate is 1%.

- *State Sales Tax* – Ohio applies sales tax to the sale, rental, and lease of tangible personal property and certain services, unless the transaction is specifically exempt. The tax rate is 5.75%.

- *State Personal Income Tax* – Individual income in Ohio is taxed between 2.75% and 3.5% .

- *State Commercial Activity Tax* – This tax is imposed on the privilege of doing business in Ohio, measured by gross receipts from business activities. Beginning in January 2025, taxable gross receipts above $6.0 million are taxed at a rate of 0.26%. Receipts under $6.0 million will be exempt.

- Other taxes and fees including property tax, vehicle taxes, etc.

The pages the follow summarize the estimated net new economic at the local level as well as the fiscal impacts that could potentially be generated to the County and State from ongoing operations of the proposed facilities. For purposes of this analysis, the estimates reflect a stabilized year of operation, which is assumed to occur in year three.

Estimate of Economic Impacts – Diamond Field Complex

As shown, net new direct spending associated with operations of the proposed diamond field complex is estimated to be $12.6 million and total output is estimated to be approximately $18.4 million at the County level in a stabilized year. This spending is estimated to support 184 jobs and $6.3 million in labor income. Annual net new tax revenues generated from ongoing operations of the proposed diamond field complex are estimated to be $498,000 at the County level and $777,000 at the State level.

Net new direct spending associated with operations of the proposed rectangular field complex is estimated to be $11.2 million and total output is estimated to be approximately $16.3 million at the County level. This spending is estimated to support 161 jobs and $5.6 million in labor income. Annual net new tax revenues generated from ongoing operations of the proposed rectangular field complex are estimated to be $435,000 at the County level and $679,000 at the State level.

Although not quantified in this analysis given the preliminary stages of the project, construction costs associated with the development of the proposed facilities would provide additional economic and fiscal impacts to the area during the construction period. These benefits would be temporary and only occur during construction.

Proposed Diamond Field Complex in Clermont County

Estimate of Annual Net New Economic Impacts at the County Level from Ongoing Operations (Stabilized Year)

Impact	Employment (Jobs)	Labor Income	Value Added	Output	County Tax Revenues	State Tax Revenues
Direct	151	$4,574,000	$6,964,000	$12,624,000	$385,000	$596,000
Indirect & Induced	33	$1,714,000	$3,078,000	$5,748,000	$113,000	$181,000
Total	**184**	**$6,288,000**	**$10,042,000**	**$18,372,000**	**$498,000**	**$777,000**

Note: Employment, labor income, value added and output are interrelated and are not additive.

Sources: IMPLAN; Crossroads Consulting.

Proposed Rectangular Field Complex in Clermont County

Estimate of Annual Net New Economic Impacts at the County Level from Ongoing Operations (Stabilized Year)

Impact	Employment (Jobs)	Labor Income	Value Added	Output	County Tax Revenues	State Tax Revenues
Direct	132	$4,130,000	$6,239,000	$11,189,000	$333,000	$517,000
Indirect & Induced	29	$1,510,000	$2,726,000	$5,080,000	$102,000	$162,000
Total	**161**	**$5,640,000**	**$8,965,000**	**$16,269,000**	**$435,000**	**$679,000**

Note: Employment, labor income, value added and output are interrelated and are not additive.

Sources: IMPLAN; Crossroads Consulting.

Potential Next Steps

Should it be decided to move forward with the development of enhanced/new sports facilities in the County, the following outlines potential next steps in the process. These steps are in no particular order.

- Determining the site location(s) for development.
- Preparing a detailed building program and development schedule.
- Creating a funding plan for project development costs, which may include both public and private sector partners.
- Determining an operating strategy that includes exploring potential operating and programming partnerships with public and/or private entities with extensive experience in booking, marketing and servicing the target market.
- Developing a well-defined mission statement, booking policy, marketing plan and rental rate structure that is consistent with operating objectives.
- Preparing a sustainable financial plan that addresses both ongoing operational and long-term capital improvement needs.

Limiting Conditions & Assumptions

CROSSROADS CONSULTING

Limiting Conditions & Assumptions

This analysis is subject to our contractual terms as well as the following limiting conditions and assumptions:

- This analysis has been prepared for the Clermont County Convention and Visitors Bureau (Client) for its internal decision-making purposes associated with the new/enhanced sports facilities and should not be used for any other purposes without the prior written consent of Crossroads Consulting Services, LLC.
- This report should only be used for its intended purpose by the entities to whom it is addressed. Reproduction or publication by other parties is strictly prohibited.
- The findings and assumptions contained in the report reflect analysis of primary and secondary sources. We have utilized sources that are deemed to be accurate but cannot guarantee their accuracy. No information provided to us by others was audited or verified and was assumed to be correct.
- Although the analysis includes findings and recommendations, all decisions relating to the implementation of such findings and recommendations shall be the Client's responsibility.
- Estimates and analysis are based on trends and assumptions and, therefore, there will usually be differences between the projected and actual results because events and circumstances frequently do not occur as expected, and those differences may be material.
- Although this analysis utilizes various mathematical calculations, the final estimates are subjective and may be influenced by our experience and other factors not explicitly stated.
- We have no obligation, unless subsequently engaged, to update this report or revise this analysis as presented due to events or circumstances occurring after the date of this report.
- The quality of ownership and management of sports facilities can have a direct impact on economic performance. This analysis assumes responsible and competent ownership and management. Any departure from this assumption may have a significant impact on the findings outlined in this report.
- Multiple external factors influence current and anticipated market conditions. Although we have not knowingly withheld any pertinent facts, we do not guarantee that we have knowledge of all factors which might influence the operating potential of enhanced/new sports facilities. Due to quick changes in the external factors, actual results may vary significantly from estimates presented in this report.
- The analysis performed was limited in nature and, as such, Crossroads Consulting Services, LLC does not express an opinion or any other form of assurance on the information presented in this report.
- The analysis is intended to be read and used in its entirety. Separation of any portion from the main body of the report is prohibited and negates the analysis.
- In accordance with the terms of our engagement letter, the accompanying report is restricted to internal use by the Client and may not be relied upon by any party for any purpose including any matter pertaining to financing.