

SPORTS TOURISM FACILITIES: NEEDS & OPPORTUNITIES SUMMARY

Prepared for: Chattanooga Tourism Co.

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INTRODUCTION

KemperSports was engaged by the Chattanooga Tourism Co. ("Tourism Co.") to conduct a comprehensive assessment of sports tourism in Chattanooga and Hamilton County. The purpose of this study is to evaluate the region's current sports tourism assets, competitive position, and market opportunities, while identifying strategic actions that will strengthen Chattanooga and Hamilton County's ability to attract, host, and retain athletic events over the next decade and beyond.

As the sports tourism industry continues to expand nationally, destinations that invest strategically in facilities, infrastructure, partnerships, and coordinated planning are capturing increasing levels of visitor spending, economic impact, and long-term community benefit. This assessment is designed to provide local leaders with a clear, data-driven framework to guide future investment and policy decisions that enhance competitiveness and ensure sustainable growth.

The analysis evaluates the full inventory of sports facilities across Hamilton County, assessing their condition, capacity, utilization, and ability to meet current and future market demands. It identifies strengths within the existing system, highlights gaps and constraints that may limit event attraction, and explores opportunities to enhance existing assets or develop new tournament-ready venues. In addition to physical infrastructure, the study examines operational capacity, organizational alignment, market positioning, and the broader ecosystem required to support successful sports tourism, including lodging supply, transportation access, workforce readiness, and public and private partnerships.

Through market research, competitive benchmarking, stakeholder engagement, and industry trend analysis, this report provides a comprehensive understanding of Chattanooga's position within the regional and national sports tourism landscape. It also evaluates potential development and investment scenarios, assessing their ability to generate economic impact, increase non-local visitation, and align with long-term community priorities. This executive summary document is intended to provide a high-level overview of the most critical findings, insights, and recommendations contained within the full detailed report.

The findings and recommendations presented herein establish a strategic roadmap for advancing sports tourism in Chattanooga and Hamilton County. Together, they outline actionable priorities to strengthen competitiveness, support sustainable economic growth, and position the region for long-term success in an evolving and increasingly competitive marketplace.

LOCAL & REGIONAL MARKET ANALYSIS

Local Market Overview

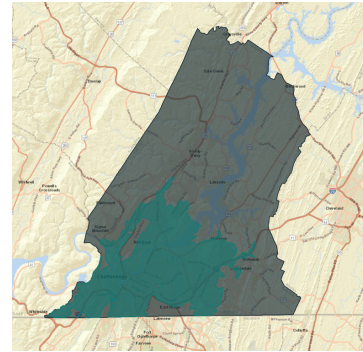
KemperSports conducted a targeted market and demographic assessment of Chattanooga and Hamilton County to evaluate the region's current position and future potential as a sports tourism destination. The analysis reviewed population growth, drive-time accessibility, tourism activity, income levels, and age distribution to assess demand drivers and long-term growth capacity.

Chattanooga and Hamilton County benefit from steady growth, strong regional access, and a diverse economic base. Located in Southeast Tennessee with convenient access to major drive-time markets, the region is well positioned to attract amateur sports events and visitor activity.

Ongoing investment in downtown development, tourism assets, and community infrastructure has strengthened the area's destination profile. Collectively, these factors provide a solid foundation for continued expansion and strategic investment in sports tourism.

Trends

The following highlights key demographic trends shaping population growth, market dynamics, and long-term potential in Chattanooga and Hamilton County.



▶ POPULATION SCALE

Hamilton County's population of more than 381,000 residents provides a substantial and diverse base to support year-round youth programming, league play, and tournament hosting.

▶ GROWTH TRENDS

Projected population growth in both Chattanooga and Hamilton County outpaces national averages, signaling continued expansion of the youth athlete pipeline and sustained demand for sports facilities and programming.

▶ MEDIAN AGE

A younger median age in Chattanooga and stable age distribution countywide create a healthy mix of entry-level participants and long-term sports engagement.

▶ YOUTH POPULATION SHARE

Residents ages 5–19 represent approximately 18 to 18.5 percent of the population, consistent with national benchmarks and supportive of reliable player volume across leagues, clubs, and school athletics.

▶ SPENDING CAPACITY

A favorable cost-of-living environment enhances local participation and destination appeal, while overall household income levels provide capacity to sustain tournament spending and advanced training opportunities.

▶ FEE BENCHMARKS

Local sports and recreation fee structures remain accessible while allowing flexibility to support higher-level programming and event hosting.



Regional Market Overview

KemperSports analyzed Chattanooga and Hamilton County’s regional reach using 2.5-, 4-, and 5-hour drive-time markets to define the realistic population base for tournament participants and spectators.

Within a 2.5-hour drive time, the region captures a diverse mix of mid-sized and growing communities, anchored by major metropolitan markets such as Atlanta and Nashville. Expanding to 4 and 5 hours places Chattanooga within reach of several major Southeastern metropolitan areas, significantly increasing its accessible market and event potential. With strong geographic positioning, accessibility, and an established destination brand,

Chattanooga is well positioned to compete for regional and destination-level events. The following section benchmarks the region across key sports tourism factors relative to competing markets.

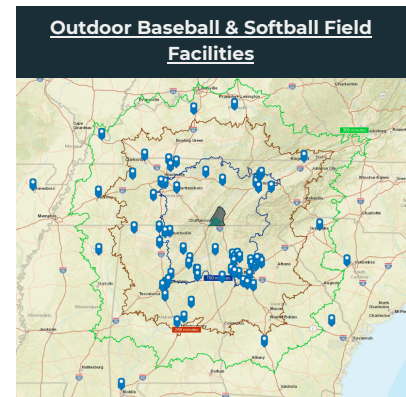
<p>▶ REGIONAL REACH</p>	<p>Chattanooga draws from 8.9 million residents within 2.5 hours and more than 20 million within four hours, supporting consistent tournament recruitment and year-round demand.</p>
<p>▶ ACCESSIBILITY</p>	<p>Chattanooga’s location at the junction of I-24, I-75, and I-59 provides strong regional access, supporting competitiveness for regional and multi-day sports events.</p>
<p>▶ FAMILY FRIENDLY DESTINATION</p>	<p>Chattanooga and Hamilton County offer a family-friendly destination with strong lodging, dining, and attractions such as the Tennessee Aquarium riverfront recreation, outdoor recreation, and museums supporting multi-day stays and repeat visitation.</p>
<p>▶ MARKET DRIVERS</p>	<p>Chattanooga combines metro-level amenities with small-market affordability and ease, strengthening its competitiveness for regional and multi-day sports events.</p>
<p>▶ HOSTING READINESS</p>	<p>Chattanooga and Hamilton County provide a strong event environment with ample lodging, diverse attractions, and efficient access. These assets enhance the visitor experience and support the attraction and retention of multi-day sports events.</p>
<p>▶ COMMUNITY SUPPORT</p>	<p>Chattanooga and Hamilton County benefit from strong leadership alignment and community support for sports tourism. A coordinated approach to investment and long-range planning strengthens the region’s ability to attract and retain events.</p>
<p>▶ VISITOR AFFORDABILITY</p>	<p>Chattanooga offers a more affordable alternative to larger tournament markets, with competitive lodging and lower event costs. This value supports strong participation, repeat visitation, and sustained sports tourism growth.</p>
<p>▶ EXISTING SPORTS ECOSYSTEM</p>	<p>Chattanooga benefits from a strong local sports ecosystem and community support, enhancing event execution and supporting long-term sports tourism growth.</p>
<p>▶ MARKET DEMAND</p>	<p>Growing youth and amateur tournament demand across the Southeast positions Chattanooga to capture increased event activity, supported by strong regional access, affordability, and destination appeal.</p>

COMPETITIVE ANALYSIS

KemperSports conducted a regional competitive analysis to evaluate Chattanooga and Hamilton County's position within the broader sports tourism landscape. The review assessed comparable tournament destinations within a realistic travel radius, examining facility scale and quality, event history, operational standards, supporting amenities, and recent expansion activity. In total, 170 facilities across the region were analyzed to provide a comprehensive view of the competitive environment.

This analysis identifies how local venues compare to peer markets, highlighting competitive strengths as well as gaps related to capacity, sport-specific demand, amenities, and service levels. It also evaluates additional facility types that could enhance the region's ability to attract and retain events. Based on these trends, KemperSports developed a county-wide inventory target range to be achieved through strategic new facility development and/or improvements to existing assets within the Hamilton County portfolio.

The findings provide clear context for future investment decisions, helping determine where upgrades or new development may strengthen Chattanooga's competitiveness and long-term standing as a leading sports tourism destination in the Southeast.





CORE FINDINGS

Market Share Is Actively Being Lost to Expanding Competitors: Surrounding Southeast markets are reinvesting in turf systems, lighting, court density, and modernized amenities, widening the competitive gap and increasing the risk of continued event and revenue leakage without local action.

Indoor Court Gap Is Structural: Chattanooga lacks a purpose-built indoor tournament facility, while 24 major regional complexes average 7+ basketball courts and 13+ volleyball courts, with top venues far exceeding that scale.

Minimum Indoor Threshold Is Clear: To compete regionally, a new indoor complex should provide 10 to 12 basketball courts, cross-lined to accommodate 20 to 24 volleyball courts, aligning with baseline industry standards for tournament viability.

Outdoor Field Inventory Falls Below Regional Standards: Competitive markets operate 16–27 contiguous, tournament-ready fields, while Hamilton County currently falls short in both scale and configuration.

Camp Jordan Is the Only Tournament-Scale Outdoor Multi-Purpose Field Footprint: Camp Jordan meets minimum contiguous field thresholds for outdoor multi-purpose tournament play but lacks sufficient turf inventory, lighting, and supporting amenities to compete with modern regional complexes.

Surface Diversity and Lighting Are Critical Outdoor Deficiencies: Heavy reliance on natural grass and limited lighting reduce scheduling flexibility, increase weather risk, and constrain event recruitment.

County-Wide Outdoor Target Range Identified: To reach tourism-ready scale, Hamilton County should target 20–24 tournament-capable fields, ideally concentrated at a single site or limited number of locations.

Baseball and Softball Market Is Highly Saturated: More than 60 competitive complexes operate within the region, with successful venues typically offering 8–19 diamonds at a single site.

Competitive Baseball/Softball Target Established: A coordinated county-wide inventory of 18–22 upgraded, tournament-ready diamonds is required to compete effectively and retain local spending.

Tennis Success Is Driven by Court Density: Regional tournament destinations now offer 24–30 contiguous courts, with lighting and centralized amenities considered baseline expectations.

Champions Club Represents a Near-Term Opportunity: With renovation and reconfiguration, Champions Club could expand to approximately 26 courts, positioning Chattanooga within the competitive range without new land acquisition.

Ice Sports Infrastructure Is Absent: Chattanooga currently has no indoor ice facility, resulting in consistent out-of-market travel and spending leakage.

Minimum Ice Viability Requires Two Sheets: Any new ice facility must include at least two sheets to operate efficiently, though its value should be viewed primarily as participation retention rather than large-scale economic impact generation.

STAKEHOLDER ENGAGEMENT

KemperSports, in partnership with the Tourism Co., engaged elected officials, parks leaders, facility operators, and tourism stakeholders across Chattanooga, East Ridge, and Hamilton County to assess facility conditions, operational challenges, and market opportunities. The following section summarizes the seven key themes identified through these discussions.

- 01 | Existing Facility Utilization and Constraints**

Stakeholders noted that many facilities operate near capacity and lack the scale and amenities needed for today's sports tourism demands, limiting competitiveness and the ability to host larger tournaments.
- 02 | Need for Facility Enhancements and Modernization**

Stakeholders emphasized targeted upgrades to surfaces, lighting, synthetic turf, and key amenities to remain competitive. These improvements are viewed as essential to enhancing event quality and utilization without full redevelopment.
- 03 | Demand for Additional Capacity and Flexibility**

Stakeholders cited limited facility capacity as a key constraint, with many venues operating near full utilization during peak seasons. The need to split events across multiple sites creates logistical challenges and limits the ability to attract larger tournaments, reinforcing the need for expanded, contiguous capacity.
- 04 | Importance of Coordinated Facility Use**

Stakeholders stressed the need for stronger coordination among facilities and agencies to maximize assets and improve event delivery. Better alignment in scheduling and operations would reduce conflicts, enhance the visitor experience, and strengthen the region's sports tourism reputation.
- 05 | Economic Impact and Community Benefit**

Stakeholders noted that sports tourism drives consistent visitor spending and job support while enhancing community visibility and quality of life. Ongoing facility investment is essential to sustaining and growing this economic impact.
- 06 | Need for a Large-Scale Indoor Tournament Facility**

Stakeholders identified the lack of a purpose-built, large-scale indoor tournament facility as a significant gap. Existing venues and the Convention Center cannot consistently support high-capacity, multi-court events, limiting competitiveness. A centralized indoor complex is needed to attract major tournaments and strengthen the region's indoor sports tourism position.
- 07 | Desire for Long-Term Planning and Investment Clarity**

Stakeholders emphasized the need for a clear, long-term facility strategy to guide investment, improve coordination, and strengthen funding and partnership opportunities.

Tournament & Events Rights Holder Survey Overview

Chattanooga Tourism Co., in partnership with KemperSports, distributed a targeted survey to tournament and event rights holders who have previously hosted events in Chattanooga and Hamilton County to gather direct feedback on facility quality, operations, and overall experience. Respondents represented a range of leadership roles across diverse sports, providing insight into strengths, competitive advantages, and areas for improvement. The findings help identify targeted enhancements and strategic investments to attract larger events, increase repeat bookings, and strengthen the region's competitive position in the sports tourism market. The following information provides an overview of the core findings from the survey results.

CORE FINDINGS

Strong Market Endorsement: 94% of respondents would recommend Chattanooga/Hamilton County as a tournament destination, reflecting high overall satisfaction and confidence in the market.

Accessibility Is the Top Booking Driver: Central Southeast location and strong interstate access are the most influential factors in site selection decisions.

Operational Execution Is a Strength: On-site staff support received the highest satisfaction rating (3.8/5), indicating strong event-day coordination and professionalism.

Tourism Partnership Is Highly Valued: Ease of working with the Tourism Co. (3.7/5) reinforces Chattanooga's reputation as responsive and collaborative.

Facilities Are Viewed as Functional but Not Elite: Facility quality (3.6/5) and playing surface quality (3.5/5) indicate generally positive perceptions, though not consistently exceeding competitive standards.

Technology Is the Clearest Weakness: Technology support received the lowest satisfaction rating (3.2/5), highlighting Wi-Fi, digital scoreboards, and AV systems as priority upgrade areas.

Capacity Limits Event Scalability: Moderate satisfaction with field and court counts (3.5/5) reflects constraints that limit growth, simultaneous events, and larger tournament recruitment.

Strong Demand for a Multi-Court Indoor Facility: Open-ended feedback consistently cited the need for a centralized indoor basketball/volleyball complex to avoid multi-site logistics.

Turf Expansion Is a Priority: Repeated references to turf and weather concerns confirm natural grass reliance creates operational risk and limits reliability.

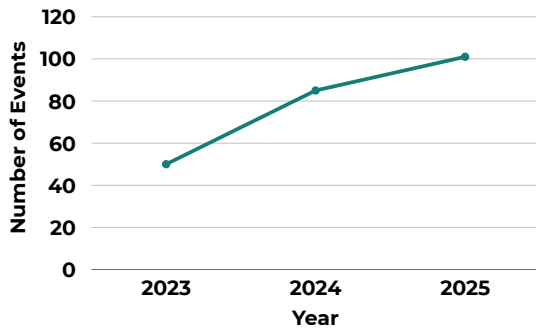
Value Proposition Remains Competitive: Cost of hosting ranked as a top-three decision factor, indicating Chattanooga is viewed as a financially competitive alternative to larger metro markets.

HAMILTON COUNTY SPORTS TOURISM FACILITIES ASSESSMENT

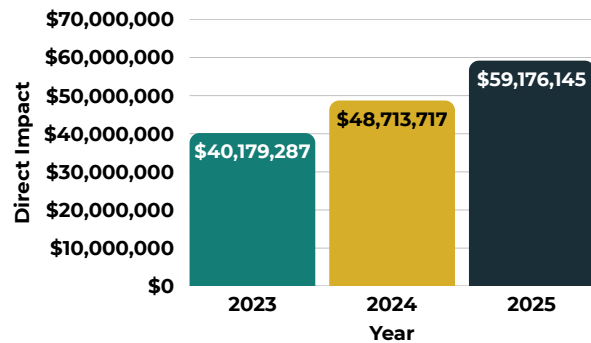
KemperSports conducted an in-market site visit to evaluate Hamilton County's sports tourism-capable facilities, assessing condition, functionality, layout, amenities, and overall competitiveness within the regional marketplace. This on-site review identified operational strengths, modernization needs, and structural constraints that impact tournament scalability and event quality. The following section summarizes performance metrics across facilities in Chattanooga, East Ridge, and Hamilton County that are currently leveraged for sports tourism events, reflecting activity driven by Chattanooga Tourism Co. The detailed report includes a facility-by-facility breakdown to isolate performance and demand by individual venue.

PERFORMANCE SNAPSHOT

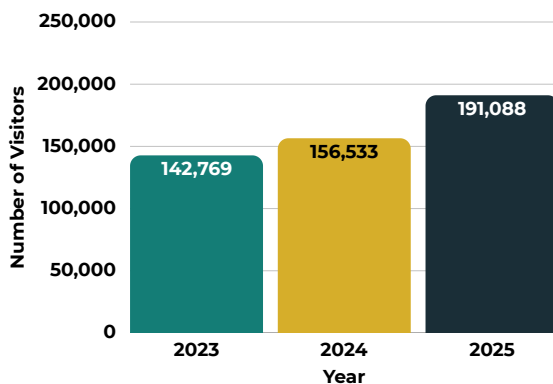
Annual Events



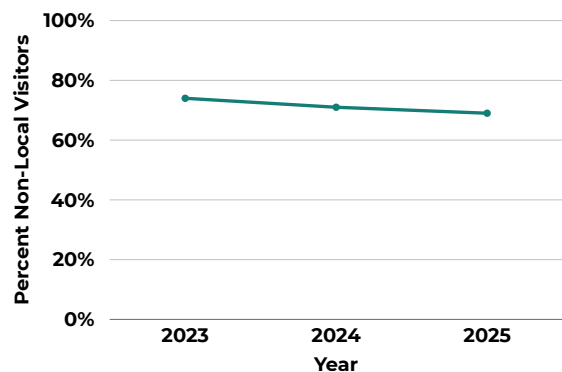
Annual Direct Impact



Annual Visitors



Non-Local Visitors





CORE FINDINGS

Warner Park & Frost Stadium Are High-Performing Growth Assets: Event volume more than doubled from 9 events (2023) to 19 events (2025), with direct economic impact increasing from \$2.6M to \$13.9M, validating recent capital reinvestment.

Summit of Softball Complex Is the County's Primary Softball Site: Its higher number of contiguous fields supports larger team counts than Warner Park, positioning it as the core softball tournament asset.

Summit's Surface Composition Limits Scalability: Natural grass outfields and clay infields reduce weather reliability and constrain its ability to compete with turf-based regional complexes.

Summit Falls Below Regional Tournament Scale: The complex does not independently meet field-count thresholds for large regional or national softball events and relies on multi-site hosting.

Camp Jordan Is the Only Tournament-Ready Multi-Purpose Field Complex: It is the County's sole rectangular-field tournament footprint, with no comparable secondary facility to scale events.

Camp Jordan Lacks Regional Turf Density: Despite recent improvements, it remains below regional benchmarks for total fields and synthetic turf coverage, limiting competitiveness for large soccer and lacrosse tournaments.

Camp Jordan's Standalone Model Caps Economic Impact: Without complementary rectangular-field sites, team counts and overall visitation are structurally constrained.

Redoubt Soccer Complex Functions Primarily as Local Recreation: Limited contiguous field count, parking, amenities, and natural grass reliance prevent tournament-scale viability.

Cleveland T. Grimes Soccer Complex Is Not Tourism-Scaled: Community-focused operations, natural grass surfaces, and limited infrastructure restrict its role in multi-day event hosting.

Finley Stadium Serves as a Flagship Showcase Venue: Recent turf, lighting, and premium amenity upgrades strengthen its role as a championship and finals site, though it is not designed for bracket-style tournaments.

Chattanooga Convention Center Not Designed as a Primary Sports Venue: The facility's core mission is conventions, trade shows, and meetings. Sports hosting is opportunistic rather than programmatic, and it is not positioned to serve as a dedicated or recurring tournament anchor within the regional sports tourism market.

Champions Club Tennis Complex Is a Growing Tourism Asset: Events increased from 10 (2023) to 16 (2025), with economic impact rising from \$1.48M to \$2.39M, reflecting successful reinvestment.

Champions Club Benefits from Single-Site Court Density: Centralized layout improves tournament efficiency, scheduling, and repeat bookings compared to split-site models.

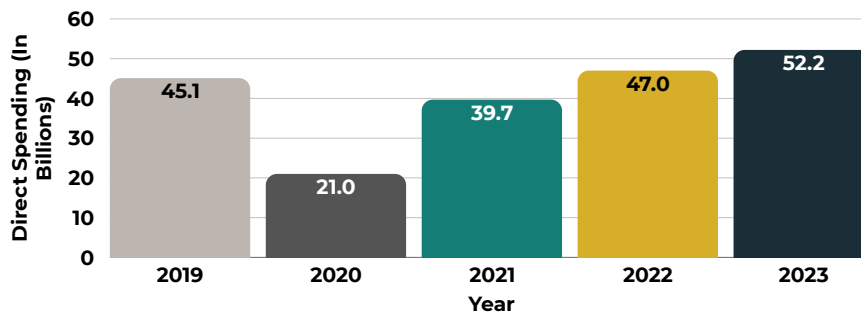
System-Wide Theme: Capacity and Turf Density Drive Competitiveness: Facilities that have received turf, lighting, and amenity upgrades are demonstrating measurable event and economic growth, while natural-grass and sub-scale complexes are losing relative competitiveness.

NATIONAL & REGIONAL SPORTS TOURISM TRENDS & SWOT ANALYSIS

KemperSports evaluated national and regional sports tourism trends using the Sports ETA 2023 State of the Industry Report to ensure local recommendations align with industry demand. These insights were combined with local market conditions and facility evaluations to guide strategic facility improvements, potential new development, and operational strategies that strengthen competitiveness and support long-term sports tourism growth.

Sports Tourism Industry Direct Spending Overview

The 2023 sports tourism sector generated \$52.2 billion in direct spending nationwide, an 11% year-over-year increase driven by record traveler volume and rising per-traveler spending.

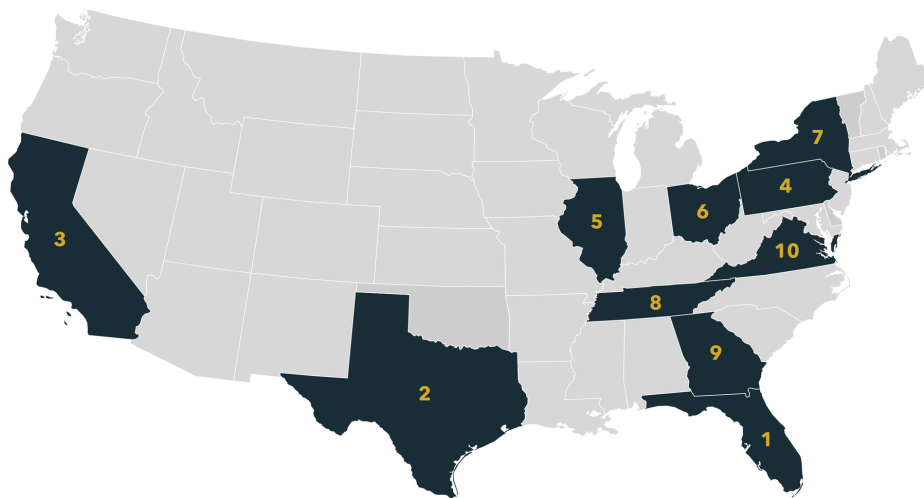


Source: Sports ETA, Longwood International, U.S. Travel Association, Tourism Economics

Tennessee's Position in the National Sports Tourism Landscape

Tennessee ranks eighth nationally in sports tourism economic impact, demonstrating the state's growing competitiveness for regional and national sporting events. This performance highlights how strategic investment in facilities, event recruitment, and destination infrastructure can generate significant economic returns regardless of market size.

The following image highlights the top ten U.S. states by sports tourism economic impact in 2023.



Source: Sports ETA, Longwood International, U.S. Travel Association, Tourism Economics

Tennessee's strong sports tourism performance is driven by its central location, regional accessibility, and network of tournament-capable venues. Communities like Chattanooga and Hamilton County benefit from these advantages, positioning the region to capture additional regional tournament demand.

Sports Tourism SWOT Analysis Overview

KemperSports conducted a SWOT analysis to evaluate the strengths, weaknesses, opportunities, and threats affecting sports and recreation facilities across Chattanooga and Hamilton County. The assessment reviewed facility conditions, operational capacity, market demand, accessibility, and regional competition to understand the region's current position and future potential. The findings provide a strategic framework to guide facility improvements, investment priorities, and long-term sports tourism planning.

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Strong Organizational Leadership and Destination Management • Strategic Use of a Diverse Network of Facilities • Proven Capacity to Host and Support Events • Validation Through Recent Capital Investment 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Limited Inventory of Large-Scale, Tournament-Ready Facilities • Aging or Constrained Facilities in Key Sport Segments • Absence of a Dedicated Indoor Court Sports Complex • Facility Lease Structures That Limit Tourism Flexibility
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Development of a Large-Scale Indoor Court Sports Complex • Strategic Enhancement of Existing Facilities or Development of New Facilities • Event Portfolio Diversification • Enhanced Collaboration with Recreational Facilities 	<p>THREATS</p> <ul style="list-style-type: none"> • Increasing Competition from Peer and Emerging Markets • Rising Development and Operating Costs • Evolving Expectations from Event Organizers and Governing Bodies • Dependence on a Finite Pool of Events and Sports Segments

Chattanooga and Hamilton County benefit from strong leadership, coordinated public-private partnerships, and an established portfolio of facilities that support consistent event delivery and economic impact. However, limited inventory of large tournament-ready venues, aging infrastructure, and operational constraints restrict the region's ability to attract major multi-field and multi-court events. Strategic development of new facilities, including a large indoor court complex and targeted upgrades to existing venues, along with diversification into emerging and year-round sports, presents significant growth opportunities. At the same time, increasing competition from peer markets and rising development and operating costs highlight the need for sustained investment and long-term strategic planning to maintain competitiveness.

NEW FACILITY DEVELOPMENT & IMPROVEMENT OPPORTUNITIES

Facility Development and Enhancement Framework

KemperSports developed a facility development and enhancement framework to strengthen Chattanooga and Hamilton County's competitiveness in the regional and national sports tourism market. These recommendations are informed by facility assessments, stakeholder engagement, market analysis, and industry benchmarks and are intended to guide strategic investment and long-term infrastructure planning. The framework establishes benchmark inventory targets that reflect the scale and functionality required for competitive tournament destinations.

A key finding is the absence of a purpose-built indoor court sports complex. Indoor sports such as basketball and volleyball represent one of the most active segments of sports tourism and generate significant multi-day tournament demand. Because no existing facility can support large, centralized court-based events, development of a dedicated indoor complex represents a major opportunity to expand the region's event portfolio.

For outdoor multi-purpose field sports such as soccer, lacrosse, and rugby, the region currently relies primarily on Camp Jordan Park, which provides 11 tournament-capable fields. Regional benchmarks indicate that competitive destinations typically offer 20 to 24 fields. Achieving this target would require the equivalent of 9 to 13 additional fields through upgrades to existing sites or development of a new multi-field complex.

Baseball and softball infrastructure represents a relative strength. Facilities including Warner Park and Frost Stadium, The Summit of Softball Complex, and Camp Jordan Park collectively provide approximately 26 fields, exceeding the recommended regional target of 18 to 22. As a result, future efforts should focus on modernization and targeted upgrades rather than new construction.

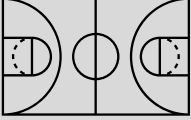
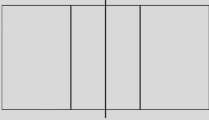
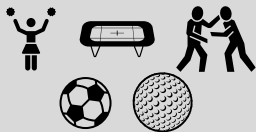


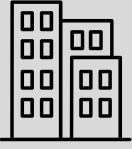



Tennis presents a clear opportunity for expansion through renovation. The Champions Club Tennis Complex at Rivermont Park currently supports approximately 20 tournament-ready courts, while six additional courts are not in playable condition. Restoring these courts would increase the total to 26, aligning with the recommended regional target of 24 to 30 courts.

Chattanooga and Hamilton County also lack a purpose-built indoor ice facility. While ice sports typically generate less tournament volume than field or court sports, an ice facility would support year-round participation and help retain local sports spending that currently leaves the region.

Collectively, these recommendations provide a roadmap for strengthening the region's sports tourism infrastructure. By addressing facility gaps and strategically reinvesting in existing venues, Chattanooga and Hamilton County can expand event capacity, increase visitation, and generate sustained economic impact.

Indoor Court Facility: 10 - 12 Court Development Overview

The following information provides an overview of the proposed 10-12 court indoor sports complex model, outlining the primary facility components, supporting amenities, and ancillary spaces required to support efficient operations, event hosting, and year-round use.

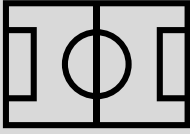
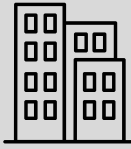




<p>10 - 12 Basketball Courts</p> 	<p>20 - 24 Volleyball Courts</p> 	<p>83,200 - 99,840 SF Court Area</p> 
<p>22,000 - 25,400 SF Administrative and Flex Space</p> 	<p>26,000 - 31,300 SF Mechanical, Electrical, and Support Areas</p> 	<p>132,000 - 156,000 SF Indoor Sports Facility</p> 
<p>526 - 626 Parking Spaces</p> 	<p>8.2 - 9.8 Acres</p> 	<p>\$53.2 - \$62.7 Million</p> 

Outdoor Multi-Purpose Field Facility: 9 - 13 Multi-Purpose Field Development Overview

Several outdoor multi-purpose field complexes across Chattanooga and Hamilton County could be upgraded through synthetic turf conversion, modern lighting, improved amenities, and enhanced parking and circulation to achieve tournament-ready standards.

Two scenarios illustrate how the region could reach the target of 9 to 13 additional tournament-capable fields through upgrades to existing facilities. Where site constraints limit expansion, new purpose-built facilities may be required. Combining selective upgrades with potential new development would create a balanced network of venues that complements Camp Jordan Park and strengthens the region's ability to host regional and national events.

Enhancement and Conversion of Existing Facilities Development Overview

9 - 13 Full- Size Synthetic Turf Multi-Purpose Fields 	2 -3 Modern Support Buildings 	1 Maintenance Building 
810 - 1,170 Parking Spaces 	42.3 - 61.1 Acres 	\$23.3 - \$29.9 Million 

New Facility Development Overview

The development of new tournament-ready facilities under the 9 to 13 field option would follow the same performance standards as upgraded sites, including regulation-size fields, synthetic turf, modern lighting, and tournament support infrastructure. While new development requires greater upfront investment due to site work and infrastructure installation, it allows for purpose-built layouts that improve circulation, operational efficiency, and event execution. A centralized complex would reduce reliance on multiple dispersed venues, simplify logistics, and create a more competitive environment for hosting large-scale tournaments.

The estimated development cost for a new outdoor multi-purpose complex is approximately \$33.2 million for a 9-field facility and \$46.3 million for a 13-field facility.

Outdoor Baseball and Softball Facility: 8 - 12 Field Development Overview

Targeted reinvestment in existing baseball and softball facilities has proven to be an effective strategy for strengthening Chattanooga and Hamilton County's sports tourism infrastructure. Upgrades at venues such as Warner Park, Frost Stadium, and Camp Jordan Park have improved playing surfaces, lighting, amenities, and overall tournament readiness, transforming these sites into dependable event venues.

Recent and planned investments, including the conversion of additional fields at Camp Jordan Park to synthetic turf, will further enhance durability, scheduling flexibility, and year-round playability. With six turf fields currently in operation at Warner Park and Frost Stadium and four additional turf fields approved at Camp Jordan Park, the county is on track to operate ten tournament-capable turf fields.

Continued reinvestment, particularly through additional turf conversions and targeted facility upgrades, is recommended to reach the optimal county-wide target of 18 to 22 tournament-capable fields and support long-term sports tourism growth.

This investment would improve durability, expand year-round playability, reduce weather disruptions, and strengthen the region's ability to attract and retain high-value tournaments. Estimated development costs are approximately \$11.2 million for eight fields and \$14.6 million for twelve fields.

Outdoor Tennis Courts: 6-Court Development Overview

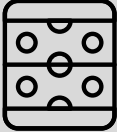

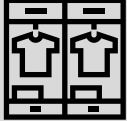


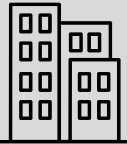



The following information outlines estimated development costs to renovate six currently unusable courts at the Champions Club Tennis Complex at Rivermont Park. Proposed improvements include full court reconstruction, new playing surfaces, upgraded lighting, modern scoring technology, and enhanced spectator and player amenities.

Restoring these courts would expand the facility's inventory to 26 tournament-ready courts, aligning with benchmark standards for premier tennis destinations. This upgrade would improve scheduling flexibility, support larger tournaments, and strengthen Chattanooga and Hamilton County's position in the regional tennis sports tourism market. The estimated development cost to restore and redevelop the six courts is approximately \$1.4 million.

Indoor Ice Facility: 2 Rink Development Overview

KemperSports evaluated the development of an indoor ice facility in response to stakeholder feedback identifying a need for additional ice capacity in the region. While ice sports such as hockey and figure skating represent an important segment of the sports ecosystem, ice facilities differ from field and court venues due to higher construction and operating costs and lower participant throughput.

As a result, they typically function as community-serving assets with supplemental tourism benefits rather than primary economic drivers. Based on regional benchmarks and market conditions, KemperSports identified a two-sheet indoor ice facility as the appropriate and scalable model for Chattanooga and Hamilton County, allowing for simultaneous programming, league play, and regional competitions while maintaining operational sustainability. The following information provides a development overview for a two-rink indoor ice facility.

2 Ice Rinks 	20,000 SF Spectator Areas 	10 Locker Rooms 
11,600 SF Administrative and Flex Space 	25,500 SF Mechanical, Electrical, and Support Areas 	110,000 SF Indoor Sports Facility 
441 Parking Spaces 	6.9 Acres 	\$54.2 Million 



CORE FINDINGS

New Indoor Court Complex Addresses a Major Market Gap: Development of a 10 to 12 court indoor facility would expand Chattanooga and Hamilton County's ability to host basketball, volleyball, and other court-based tournaments, increasing event capacity, hotel demand, and competitiveness for regional and national events.

Enhancements Offer a Cost-Effective Expansion Strategy: Upgrading existing multi-purpose fields can increase tournament capacity while leveraging current infrastructure and requiring lower upfront investment than new construction.

Site Constraints Limit Upgrade Potential: Acreage, parking, and circulation limitations may restrict expansion and require improvements across multiple multi-purpose field locations.

Dispersed Sites Increase Operational Complexity: Multi-site multi-purpose field enhancements create logistical challenges for scheduling and event management.

New Development Enables Purpose-Built Infrastructure: A new multi-purpose field complex allows for optimal layout, circulation, parking, and spectator amenities.

Centralized Facilities Improve Long-Term Competitiveness: Purpose-built complexes provide greater scalability and stronger ability to attract large regional and national tournaments.

Synthetic Turf Baseball and Softball Fields Provides Cost-Effective Capacity Expansion: Converting natural grass fields increases tournament capacity without requiring new land or major construction.

Improved Reliability and Utilization: Turf reduces weather disruptions and supports more games, longer tournaments, and extended seasonal use.

Stronger Regional Competitiveness: Expanding to 18–22 tournament-ready fields would significantly enhance Chattanooga and Hamilton County's ability to host large-scale events.

Expanded Tennis Court Capacity Increases Event Potential: Renovating the remaining courts improves scheduling flexibility, allows simultaneous tournaments and divisions, and supports larger events that generate greater visitor spending.

Facility Modernization Strengthens Regional Competitiveness: Upgrading court quality and infrastructure positions the complex to attract higher-profile tournaments and reinforces Chattanooga and Hamilton County's standing as a competitive tennis destination.

Limited Sports Tourism Return Compared to Field and Court Sports: Ice facilities host fewer participants and events per day, which limits total visitor volume, hotel room nights, and economic impact relative to large multi-field or multi-court tournament complexes.

Higher Development and Operating Costs Require Careful Scaling: Ice rinks require significantly higher capital investment, energy consumption, and specialized systems, making a two-sheet facility the most appropriate and financially sustainable model for the Chattanooga market.



ECONOMIC IMPACT ANALYSIS

Economic Impact Implications of Development and Enhancement Opportunities

The following section outlines the anticipated economic benefits associated with recommended facility improvements in Chattanooga and Hamilton County. Based on market analysis, facility assessments, and tourism performance, these enhancements are designed to increase tournament capacity, improve facility quality, and attract a greater volume of regional and national sporting events.

Targeted investments in existing facilities and strategic expansion of tournament-ready inventory will improve scheduling reliability, reduce weather disruptions, and increase the number of usable event days each year. These improvements support larger and longer-duration tournaments that generate increased visitor spending across lodging, dining, transportation, and retail sectors.

By aligning facility improvements with demonstrated market demand, Chattanooga and Hamilton County can strengthen competitiveness, increase hotel room night production, and support long-term economic growth through sports tourism.

Economic Impact Analysis Methodology

The economic impact analysis is based on a comprehensive evaluation of market conditions, facility performance, and regional tourism trends. This methodology integrates quantitative data with insights from stakeholder engagement and facility assessments to produce realistic projections aligned with current operating conditions.

The economic impact analysis draws on historical event data, facility utilization patterns, regional tourism metrics, and benchmarking against peer markets, combined with KemperSports' national experience managing sports facilities.

The assessment focuses on two categories: new direct spending generated by additional tournaments and events made possible through new facility development, and incremental direct spending resulting from enhancements to existing facilities that allow for increased usage, larger events, and longer stays. Impacts are estimated by evaluating key drivers of sports tourism demand, including event volume, non-local participation, length of stay, and visitor spending patterns. Together, these inputs provide a realistic estimate of the economic value created through both new development and strategic reinvestment in existing infrastructure.

Indoor Court Facility: 10 - 12 Court Economic Impact Overview

KemperSports conducted an economic impact assessment to evaluate the potential benefits of two indoor court facility scenarios: a 10-court model and a 12-court model. The analysis estimates how each option could generate increased visitation, tournament activity, and visitor spending, helping strengthen the local economy and Chattanooga and Hamilton County's competitiveness as an indoor sports destination.

Indoor Court Facility						
12-Court Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	22	25	30	31	32	140
Annual Non-Local Market Days	58,656	83,160	119,560	133,000	137,480	531,856
Annual Hotel Room Nights	16,759	23,760	34,160	38,000	39,280	151,959
Annual Direct Spending	\$8,993,920	\$12,979,949	\$19,020,092	\$21,561,156	\$22,709,663	\$85,264,779
10-Court Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	22	24	28	29	30	133
Annual Non-Local Market Days	56,736	73,512	92,136	106,416	110,256	439,056
Annual Hotel Room Nights	16,210	21,003	26,325	30,405	31,502	125,445
Annual Direct Spending	\$8,699,520	\$11,497,277	\$14,698,272	\$17,315,858	\$18,299,512	\$70,510,438

Outdoor Multi-Purpose Field Facility: 9 - 13 Field Economic Impact Overview

KemperSports conducted an economic impact analysis to evaluate the potential benefits of expanding outdoor multi-purpose field capacity in Chattanooga and Hamilton County. The analysis examined four scenarios: enhancing existing facilities to add 9 or 13 tournament-ready fields and developing new purpose-built complexes with 9 or 13 fields. Each scenario assesses the incremental economic impact generated by increased field capacity, including additional events, larger tournaments, and greater visitor spending.

Projections assume current activity at Camp Jordan Park remains constant, isolating the economic contribution of the added fields. Together, these scenarios provide decision-makers with a clear comparison of investment options and illustrate how expanding to a county-wide inventory of 20 to 24 tournament-ready fields could strengthen the region's sports tourism competitiveness.

Outdoor Multi-Purpose Field Facility						
9-Field Enhancement and Conversion Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	7	8	10	12	12	49
Annual Non-Local Market Days	37,624	39,640	53,752	68,998	68,998	269,010
Annual Hotel Room Nights	10,750	11,326	15,358	19,714	19,714	76,860
Annual Direct Spending	\$5,768,952	\$6,128,768	\$8,370,543	\$10,793,435	\$10,867,572	\$41,929,270
13-Field Enhancement and Conversion Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	7	9	11	13	14	54
Annual Non-Local Market Days	37,624	56,574	70,686	85,932	102,866	353,682
Annual Hotel Room Nights	10,750	16,164	20,196	24,552	29,390	101,052
Annual Direct Spending	\$5,768,952	\$8,725,376	\$10,967,151	\$13,390,043	\$16,060,788	\$54,912,310

Outdoor Multi-Purpose Field Facility						
9-Field New Facility Development Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	10	10	13	14	15	62
Annual Non-Local Market Days	53,752	53,752	69,880	83,110	85,126	345,618
Annual Hotel Room Nights	15,358	15,358	19,966	23,746	24,322	98,748
Annual Direct Spending	\$8,241,912	\$8,305,591	\$10,882,217	\$12,997,008	\$13,419,525	\$53,846,253
13-Field New Facility Development Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	13	16	19	21	22	91
Annual Non-Local Market Days	73,231	111,334	136,458	150,570	167,504	639,097
Annual Hotel Room Nights	20,923	31,810	38,988	43,020	47,858	182,599
Annual Direct Spending	\$11,228,784	\$17,166,979	\$21,129,619	\$23,439,323	\$26,157,963	\$99,122,669

Outdoor Baseball and Softball Field Facility: 8 - 12 Field Economic Impact Overview

Chattanooga and Hamilton County benefit from a strong foundation of tournament-capable baseball and softball facilities, including Warner Park and Frost Stadium, The Summit of Softball Complex, and Camp Jordan Park, which collectively provide 26 fields. This exceeds the recommended county-wide target of 18 to 22 fields and positions the region as one of the strongest baseball and softball markets in the region.

Given this existing capacity, the priority is not new construction but continued reinvestment in existing assets. Targeted improvements to field conditions, lighting, amenities, and operational infrastructure will help maintain competitiveness and support high-impact events.

KemperSports conducted an economic impact assessment evaluating the enhancement of 8 to 12 existing fields, measuring the incremental impact of increased tournament capacity and reliability, including additional events, larger tournaments, and increased visitor spending.

Outdoor Baseball and Softball Field Facility						
8-Field Enhancement and Conversion Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	3	5	5	6	6	25
Annual Non-Local Market Days	13,306	31,676	31,676	34,700	34,700	146,058
Annual Hotel Room Nights	3,802	9,050	9,050	9,914	9,914	41,730
Annual Direct Spending	\$2,040,192	\$4,954,189	\$5,053,273	\$5,646,399	\$5,759,327	\$23,453,380
12-Field Enhancement and Conversion Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	3	6	6	7	7	29
Annual Non-Local Market Days	13,306	47,200	47,200	50,224	50,224	208,154
Annual Hotel Room Nights	3,802	13,486	13,486	14,350	14,350	59,474
Annual Direct Spending	\$2,040,192	\$7,334,413	\$7,433,497	\$8,026,623	\$8,139,551	\$32,974,276

Outdoor Tennis Court Facility: 6-Court Economic Impact Overview

KemperSports conducted an economic impact assessment to evaluate the benefits of renovating six currently unusable courts at the Champions Club Tennis Complex at Rivermont Park. The analysis focuses on expanding tournament capacity and improving operational flexibility by restoring these courts to tournament-ready condition.

By leveraging an established, high-performing venue, the project would allow the facility to host larger events, support concurrent tournaments, and increase participant volume. The assessment isolates the incremental economic impact generated by additional events and visitor spending, demonstrating that targeted reinvestment in this facility represents a cost-effective strategy to strengthen Chattanooga and Hamilton County's tennis sports tourism market.

Outdoor Tennis Court Facility						
6-Court Enhancement and Conversion Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	6	7	9	10	10	42
Annual Non-Local Market Days	12,710	16,205	20,045	23,539	34,700	107,199
Annual Hotel Room Nights	3,632	4,630	5,727	6,725	6,725	27,439
Annual Direct Spending	\$1,948,928	\$2,534,431	\$3,197,707	\$3,830,265	\$3,906,870	\$15,418,201

Indoor Ice Facility: 2-Rink Economic Impact Overview

KemperSports conducted an economic impact assessment to evaluate the development of a new two-sheet indoor ice facility to support hockey, figure skating, and other ice sports. The analysis considers the creation of a purpose-built complex that would introduce a new segment of sports tourism while addressing regional demand currently traveling to other markets.

Although ice facilities generate lower event volumes than large field or court venues and require higher capital and operating costs, they support consistent year-round programming and recurring visitation. The proposed facility would diversify Chattanooga and Hamilton County's sports tourism portfolio, retain local spending, and provide steady economic and community recreation benefits.

Indoor Ice Facility						
2-Rink New Facility Development Model						
Economic Impact Metrics	Year 1	Year 2	Year 3	Year 4	Year 5	Cumulative
Annual Events	10	13	15	17	18	73
Annual Non-Local Market Days	19,440	22,680	25,920	30,780	32,400	131,220
Annual Hotel Room Nights	5,554	6,480	7,406	8,794	9,257	37,491
Annual Direct Spending	\$2,980,800	\$3,547,152	\$4,134,966	\$5,008,477	\$5,377,523	\$21,048,918



CORE FINDINGS

12-Court Indoor Model Generates Greater Economic Impact: The 12-court facility consistently produces higher event volume, non-local visitation, hotel room nights, and direct spending than the 10-court option due to increased tournament capacity.

Expanded Indoor Capacity Strengthens Return on Investment: Although the 12-court model requires higher upfront investment, the additional courts support larger and overlapping tournaments, improving long-term economic returns.

Purpose-Built Facilities Drive Stronger Event Demand: Centralized, tournament-ready complexes generate significantly higher event activity and visitor spending than enhancement-only scenarios.

Single-Site Complexes Are Preferred by Event Organizers: Contiguous field or court layouts improve scheduling efficiency, simplify logistics, and increase attractiveness for large regional and national tournaments.

Camp Jordan Capacity Constraints Limit Market Growth: As the County's primary tournament venue, Camp Jordan faces limitations due to field rest requirements and lack of comparable secondary complexes, restricting the ability to host larger or concurrent events.

Baseball and Softball Enhancements Deliver Incremental Growth: Upgrading 8 to 12 fields to synthetic turf improves reliability and scheduling flexibility, generating steady but moderate economic gains built on an already active event base.

Synthetic Turf Conversions Improve Event Retention: Turf upgrades reduce weather disruptions and increase scheduling certainty, helping retain existing tournaments and strengthen organizer confidence.

Tennis Court Renovation Unlocks Existing Demand: Restoring six unusable courts at the Champions Club Tennis Complex expands playable capacity, allowing larger tournaments and improved scheduling flexibility without new construction.

Targeted Facility Reinvestment Provides Cost-Effective Returns: Strategic upgrades to existing assets generate measurable increases in visitation and spending while minimizing capital risk compared to new facility development.

Indoor Ice Facility Provides Diversification but Modest Tourism Impact: A two-sheet ice complex would support year-round programming and retain local participation, but its economic output is lower than large field or court venues and is best viewed as a complementary asset within the broader sports tourism portfolio.

SUMMARY

This study evaluated the current state and future potential of sports tourism in Chattanooga and Hamilton County through market analysis, stakeholder engagement, facility assessments, and economic impact modeling. The findings indicate that the region has a strong foundation for continued growth, supported by a central geographic location, access to a large regional drive market, and an established base of youth and amateur sports participation. These factors position Chattanooga and Hamilton County well to attract teams and spectators from across the Southeast.

At the same time, the competitive analysis shows that many peer destinations have invested in larger, centralized tournament complexes designed to host high-volume, multi-day events. While Chattanooga benefits from strong accessibility, an attractive visitor experience, and a history of successful event hosting, some existing facilities were originally developed for community recreation and lack the scale or modern amenities increasingly expected by event organizers.

Stakeholder engagement confirmed that sports tourism plays an important role in the regional economy and highlighted the need for continued investment in facility modernization, improved coordination among venues, and clearer long-term planning for capital improvements. The facility assessment similarly found that targeted upgrades to playing surfaces, lighting, and support amenities have already produced measurable benefits at several venues, demonstrating that strategic reinvestment can significantly increase utilization and tournament demand.

Industry trends increasingly favor centralized, high-capacity venues with modern infrastructure and reliable playing conditions. To remain competitive, Chattanooga and Hamilton County will need to address capacity limitations, modernize aging facilities, and align development efforts with evolving market expectations.

The study identifies opportunities to strengthen the region's sports tourism portfolio through a combination of targeted enhancements to existing facilities and selective new development where capacity gaps exist. These investments would increase tournament hosting capacity, improve the overall event experience, and enhance the region's ability to attract larger regional and national events.

Economic analysis confirms that sports tourism generates significant visitor spending across lodging, dining, transportation, and retail sectors. Strategic investments in sports infrastructure can increase hotel room nights, visitor spending, and tax revenues while supporting long-term tourism growth.

Overall, Chattanooga and Hamilton County are well positioned to expand their role as a sports tourism destination. By pursuing coordinated planning, targeted facility investment, and strong collaboration among public and private partners, the region can strengthen its competitiveness, attract higher-value events, and sustain long-term economic benefits through sports tourism.

NEXT STEPS

To advance the findings of this study, Chattanooga and Hamilton County should pursue a phased strategy focused on targeted facility investment, strategic development where gaps exist, and continued collaboration among public, tourism, and private partners.

Advance Feasibility and Site Analysis

The next phase should focus on detailed feasibility studies for priority facility concepts, including site evaluations, infrastructure capacity, environmental considerations, and refined cost modeling. These analyses will help confirm project viability and inform development timelines.

Prioritize Capital Investment and Phasing

Given the scale of potential projects, a phased development strategy should prioritize investments that address the most critical capacity constraints and generate strong economic returns while aligning with available funding.

Advance New Development Where Needed

Where existing facilities cannot meet demand or support certain event types, purpose-built facilities should be considered to address gaps in capacity and enhance the region's competitiveness for larger tournaments.

Enhance Existing Facilities

Continued reinvestment in existing venues through targeted upgrades such as improved playing surfaces, lighting, and amenities can increase utilization, improve event quality, and extend facility lifespan.

Strengthen Coordination and Partnerships

Successful implementation will require strong coordination among local governments, tourism organizations, facility operators, and private partners to align priorities and streamline project delivery.

Refine Funding and Financial Strategies

Existing funding tools such as hotel-motel taxes, sales tax participation, tax increment financing, public-private partnerships, sponsorships, and state support should be evaluated and structured into project-specific financial models to support development.

Maintain a Long-Term Strategic Vision

Long-term success will require an adaptive strategy that aligns sports tourism development with evolving market conditions and community goals. Through coordinated planning, targeted investment, and strong partnerships, Chattanooga and Hamilton County can strengthen competitiveness and support sustained sports tourism growth.

By advancing these next steps, Chattanooga and Hamilton County can strengthen their sports tourism infrastructure, attract higher-value events, and generate sustained economic and community benefits.

