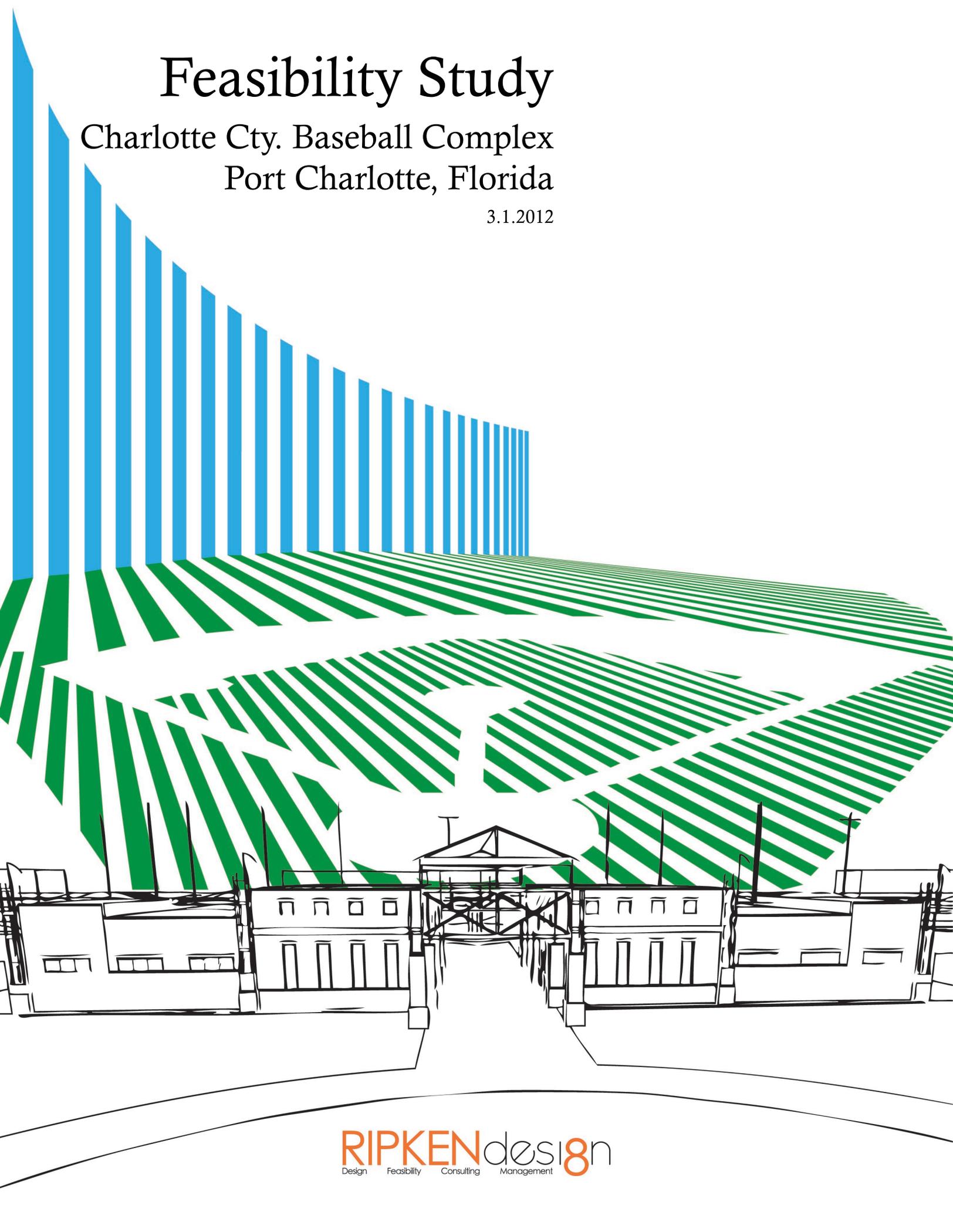


Feasibility Study

Charlotte Cty. Baseball Complex
Port Charlotte, Florida

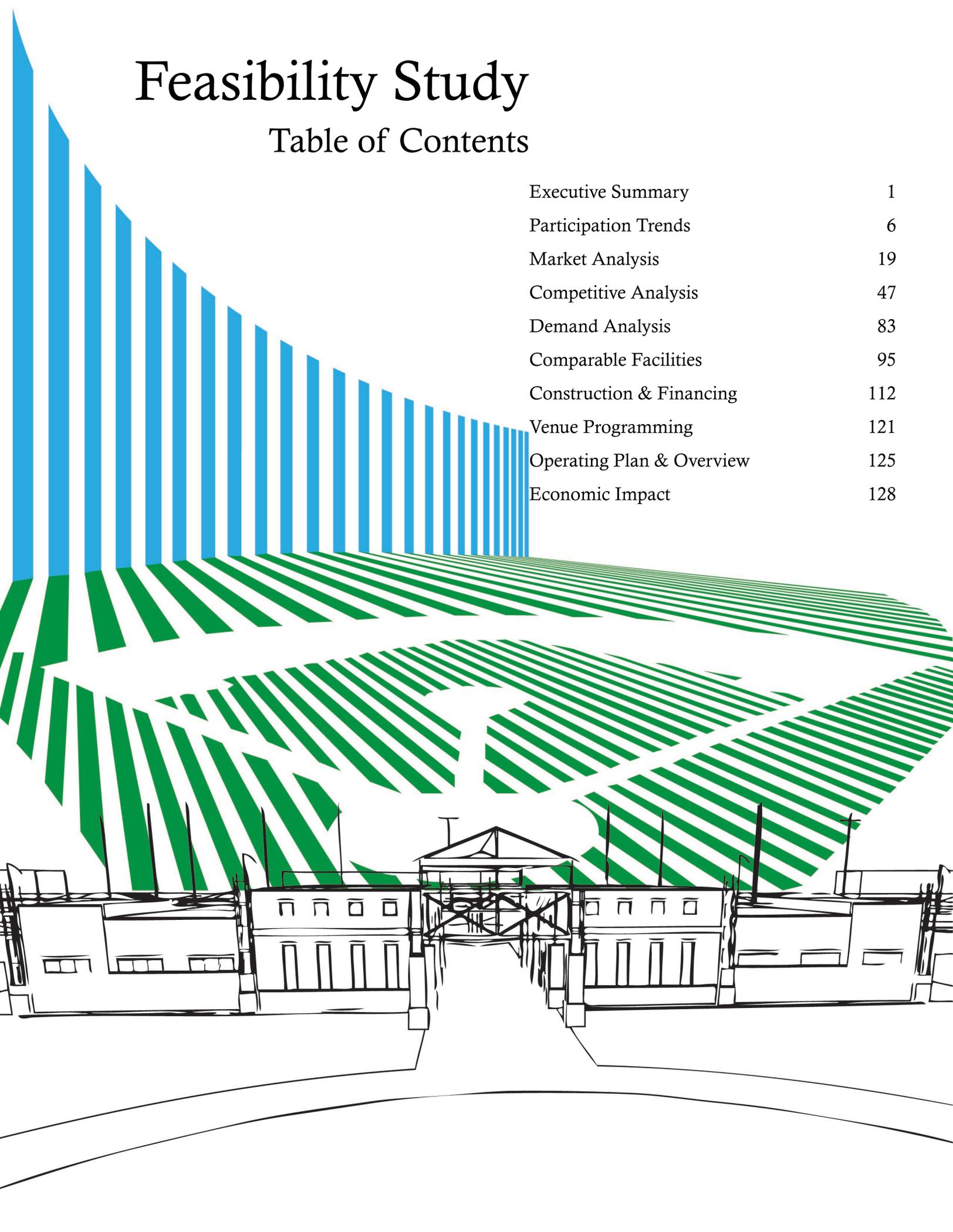
3.1.2012



Feasibility Study

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I. EXECUTIVE SUMMARY

In October of 2011, Ripken Design was retained by Charlotte County to explore the feasibility of a new sports complex in Port Charlotte, Florida. Throughout the course of this study Ripken Design examined prevailing market conditions, demographics, potential users, existing competitive facilities and a variety of other variables to support the claim that a baseball complex in Port Charlotte is a feasible venture. In addition, Ripken Design has made recommendations regarding the optimal size and scope of the complex based on an assessment of market supply and demand. Supporting data and detail is included throughout the study and a brief summary of the result is included in the remainder of this section.

Sports Complex and Murdock Village Redevelopment

The study examines the feasibility of a new sports complex to be located on approximately 40 acres within the Murdock Village CRA. The complex should be in close proximity to the Charlotte Sports Park and the North Charlotte Regional Park, as well as El Jobean Road, in order to host a cohesive tournament in connection with Charlotte Sports Park and the Tampa Bay Rays Spring Training complex. While the configuration of the North Charlotte Regional Park and the scheduling of the Charlotte Sports Park do not permit regular, large tournaments to be held across multiple facilities, the additional fields would be excellent compliments to the proposed tournament complex. With recent investments in North Charlotte County Regional Park designed to allow for the expansion of the Snowbird Classic and regular local use by Charlotte County baseball teams, North Charlotte County Regional Park is a valuable local amenity. The construction of new complex in Port Charlotte will preserve the integrity of North Charlotte County Regional Park's current schedule and configuration. Ripken Design recommends that a new complex have the ability to utilize the fields as overflow for the proposed experiential tournament complex to be located within the Murdock Village CRA, but to otherwise retain the public park purposes for which it was constructed.

The new sports complex will be planned and developed in conjunction with the larger Murdock Village Community Redevelopment Project, which is planned to consist of an extensive Entertainment District, in addition to complementary residential and commercial development. Based on a thorough analysis of the market amenities and the highly competitive environment for sports tourism in Florida, the success of a new sports complex is contingent on the simultaneous development of the entertainment. In particular the development of on-site accommodations, in particular experiential or themed accommodations, and family friendly amenities such as a water park, miniature golf, or other similar options, is essential to cultivating a "destination" environment for sports tournaments, especially with the Tampa Bay Rays Spring Training and Charlotte Stone Crabs facility located nearby. Ripken Design does not believe that a "Ripken Experience" facility, or similar sports complex with a regional or national drawing radius,

will be able to enjoy medium- or long-term success in Port Charlotte without the corresponding development of these additional amenities.

Target Market

A new sports complex in Florida has the unique opportunity to attract two significant, yet distinct, pools of potential users. The state features a large in-state baseball playing population capable of utilizing a facility throughout the year, and also creates a thriving market for regional and national visitors, drawn by the warm climate and extensive tourist attractions. Currently, there are few complexes that successfully cater to the needs of both user groups. This is because the tourist attractions that draw out-of-state visitors typically have little impact on local players who have daily access to the state's beautiful beaches and amusement parks. Conversely, many out-of-state youth teams choose to travel to Florida solely because of its warm weather, off-site attractions and on-site or nearby lodging and amenities. Ideally, a complex would be able to combine unique attractions with superior facilities to attract teams from both markets. Practically, the investment required to compete with other national destinations, like Disney's Wide World of Sports or Cocoa Expo Sports Complex, may dissuade or exclude local teams from participating. As such, the proposed complex should strike a balance in order to remain attractive to local teams while still offering a high-quality visitor experience to draw at a regional and national level.

The proposed complex in Port Charlotte will use exceptional field design, superior facilities, and family friendly complex amenities to establish a strong reputation within the local market. A programming mix of two and three day tournaments, with the occasional weeklong event will allow the complex to target Florida teams seeking state-of-the-art baseball facilities. Tournament price points of \$550 for two-day tournaments and \$650 for three-day events represent a 40-60% premium on average market rates, but are reflective of the quality of the complex. They are also intended to be all-inclusive, a stark contrast to a system of gate, parking and entry fees common throughout the market that elevate the real per tournament rates to comparable levels, or higher. Furthermore, the recommended addition of high-quality, experiential lodging on-site, will create a unique baseball destination and allow for expanded weeklong programming in the future. The aforementioned experiential lodging should be a part of the additional development of the Murdock Village CRA, and while not directly tied to the baseball complex, the two entities will be critical to each other's success.

Geographically, it is important for the proposed complex to draw heavily from southern Florida. There are excellent facilities throughout the state, but especially in northern and central Florida. Complexes such as the ESPN Wide World of Sports Complex (Orlando), Cocoa Expo Sports Complex (Cocoa Beach), Raymond Naimoli Baseball Complex (St. Petersburg) and the in-progress Nations Park (Newberry) will be strong competitors for teams from northern Florida. However, to the south and east of Port Charlotte, including the Miami metropolitan area, quality baseball complexes are in relatively low supply.

Complex Recommendations

An examination of the local market, analysis of potential users, and a competitive analysis of the recreational sports and tournament complex infrastructure within 1-hour, 2-hours, and 4-hours of the proposed site, has led Ripken Design to recommend a six (6) field baseball complex, with sufficient acreage to add 2-4 additional fields as future demand dictates. Considering the availability of the Charlotte Sports Park and its 3-4 Major League quality 90' diamonds, the recommended fields should be tournament quality synthetic fields for youth play (60'/70' adjustable basepaths). The combination of new youth fields with the existing 90' diamonds at the Charlotte Sports Park will create a complex capable of hosting tournaments for ages 5-18+. It is important to note that the Charlotte Sports Park will not be available from January 1st through April 3rd due to the Tampa Rays' Spring Training. However, through planning and discussions with the Tampa Bay Rays, three (3) of the exterior fields will potentially be available to be rented for \$100 per field per day, along with associated costs such as maintenance staff and a county supervisor.

The proposed fields will give Port Charlotte a complex that is capable of hosting local, state, and regional tournament events and provides additional field space for local youth activities. Ripken Design recommends that the fields be constructed with artificial turf, as it offers superior drainage, is playable throughout the year, and is extremely durable to allow for a maximization of programming hours without additional maintenance costs. A matrix that compares the relative costs of natural and synthetic turf will be available later in this report.

In addition to the fields themselves, the complex should offer amenities such as batting cages, bullpen areas, Ripken training circle, picnic space, playground, multiple concession areas, and ample restrooms. Further information on amenities, as well as lighting guidelines, recommended safety features, and electrical considerations can be found in the *Construction and Financing Recommendations* section.

Programming Distribution

Based on complex recommendations, Ripken Design has created a prospective programming plan to model the facility's operations. The proposed complex will offer baseball and softball programming designed to primarily target youth teams (ages 5-14), with additional programming for older teams (14-21) being held at the existing Charlotte Sports Park. Programming at the facility will primarily be made up of the following components and desired event frequencies:

- Weekend Tournaments
 - o 30 youth tournaments, 25 older tournaments
 - o \$550 youth (5-14), \$550 older (14-18)
 - o 3 game guarantee
- 3 day Holiday Long Weekend Tournaments
 - o 7 weeks of programming

- \$650 youth (5-14), \$650 older (14-18)
- 3 game guarantee
- Weeklong Tournaments
 - 2 weeks of programming
 - \$350 per person
 - 5 game guarantee
- Youth Leagues
 - Spring and Fall season
 - 10 game guarantee
 - \$1,000 per team
- Spring Training
 - 4 Weeks of High School Softball Spring Training
 - \$60-80 per person/night
 - 12-16 teams
 - Weeklong stay with accommodations built-in

The preferred programming distribution represents total number of events that Ripken Design believes to be realistic and achievable by the complex in maturity. It is not representative of the volume of programming that will be realized in the first year of operations, nor does it represent a maximum level of programming. Given the climate in Port Charlotte, 52-week programming is achievable.

The proposed complex will also be made available for local use and league play, as scheduling permits. Ripken Design will work with local leagues to allocate hours for games and practices when primary complex programming is not in effect. Additional programming may include corporate/community events, field rental, or team training. Camp programming may also be implemented, and has a greater likelihood of success after the facility is a few years into the maturation process.

Economic Impact

The addition of a new six (6) field baseball complex in Port Charlotte will have tremendous economic impact on Charlotte County, especially when paired with an attraction like experiential accommodations with additional attractions and amenities surrounding the facility. Baseball tournaments are strong drivers of economic impact, attracting thousands of visitors annually, many of which will stay at local hotels, eat at local restaurants, and shop at local stores. Although the target audience for this complex will be primarily in-state teams, many will travel from 2-6 hours away. Based on the complex recommendations, Ripken Design calculated the following low and high estimates of total annual economic impact attributable to the complex.

Economic Impact calculations follow a two-tiered process. By-category spending, traveling party size and average stay are based on survey responses by tournament attendees in 2010. Direct spending is a function of total visitors and per-category spending. Total Economic Impact (Direct + Indirect Spending), Jobs Created and Local Wage Impacts, RIMS II Type I multipliers for Charlotte County were used.

Low annual economic impact estimates correspond to Year 1 operating projections. High annual economic impact estimates correspond to Year 5 operating projections. Additional detail is available in the *Economic Impact* section of this report.

Table 1.1: Low Estimate

Year 1				
Category	Per Person/Day	Direct Impact	Total Spending	Jobs Created
Lodging	\$22.92	\$1,864,606.18	\$2,195,387.31	14.40
Transportation	\$4.28	\$348,189.98	\$373,921.22	8.81
Food/Beverage	\$16.32	\$1,327,677.70	\$1,503,993.29	19.63
Other Spending	\$13.61	\$1,107,211.61	\$1,308,834.84	14.26
Entertainment	\$2.91	\$236,736.65	\$273,418.99	3.61
Shopping	\$3.38	\$274,972.46	\$310,416.41	3.34
Event Related Expenses	\$4.97	\$404,323.42	\$456,440.70	4.92
Total	\$68.39	\$5,563,717.99	\$6,422,412.78	68.97

Table 1.2: High Estimate

Year 5				
Category	Per Person/Day	Direct Impact	Total Spending	Jobs Created
Lodging	\$22.92	\$3,534,539.04	\$4,161,566.27	27.30
Transportation	\$4.28	\$660,027.36	\$708,803.38	16.70
Food/Beverage	\$16.32	\$2,516,739.84	\$2,850,962.89	37.21
Other Spending	\$13.61	\$2,098,825.32	\$2,481,021.41	27.03
Entertainment	\$2.91	\$448,756.92	\$518,291.80	5.89
Shopping	\$3.38	\$521,236.56	\$588,423.95	6.34
Event Related Expenses	\$4.97	\$766,433.64	\$865,226.94	9.32
Total	\$68.39	\$10,546,558.68	\$12,174,296.64	129.79

Summary

Ripken Design believes that a new sports complex in Port Charlotte, in combination with the development of the entertainment district at Murdock Village, particularly including an experientially-based on-site lodging option and surrounding visitor amenities, would create a unique baseball destination that can generate tremendous economic impact for the area. Furthermore, utilizing the facility year-round will generate consistent revenue returns and will attract visitors to the area without the constraints of a particular season. Despite the presence of two different potential user markets, an uniquely designed complex complete with first-class facilities, player and visitor amenities, and outstanding attractions will combine to attract teams from throughout the state while offering an exceptional, unique experience for out-of-state visitors. Even more, the one-of-a-kind experience that the facility will offer will entice teams to return year after year.

II. PARTICIPATION TRENDS

Participation in organized team sports through youth leagues and high schools across the country has remained steady in recent years. The prevalence of organized participation illustrates the shift away from the spontaneous, pick-up play of individuals or small groups to more serious adult-directed activities that are less like play and more like work.¹ Sports participation for youth now begins at an earlier age than ever before. This trend of younger and younger play can be attributed to a number of factors, including:

- Pressures of college scholarships
- Professional Success and attributed stories: Bryce Harper, LeBron James, Freddy Adu, Rory McIlroy
- Stress and importance of activity in the battle against childhood obesity

The reduction in average participation age has accompanied a shift in the age where youth “specialize” in a sport. This has been more or less a direct result of the first two bullet points above. Whereas a decade ago, it was not uncommon for a majority of youth sports players to participate in two, three, even four sports in a given year; the past few years have seen an increased number of children dedicating themselves to one sport at an earlier age. This induced dedication has led to an increase in the number of team and private practices, games and tournaments in which a child will participate during any given year. Along with this increase comes the inevitable rise in the number of dollars a family must spend on the child’s “growth” in the sport.

The following section will look at the baseball and softball options for the proposed facility in Charlotte County. Demographics and participation trends will be analyzed at a regional level. In this case, the majority of participation will come from within the state of Florida, although some broader regional participation can be expected. This study will cover the following trends in youth sports:

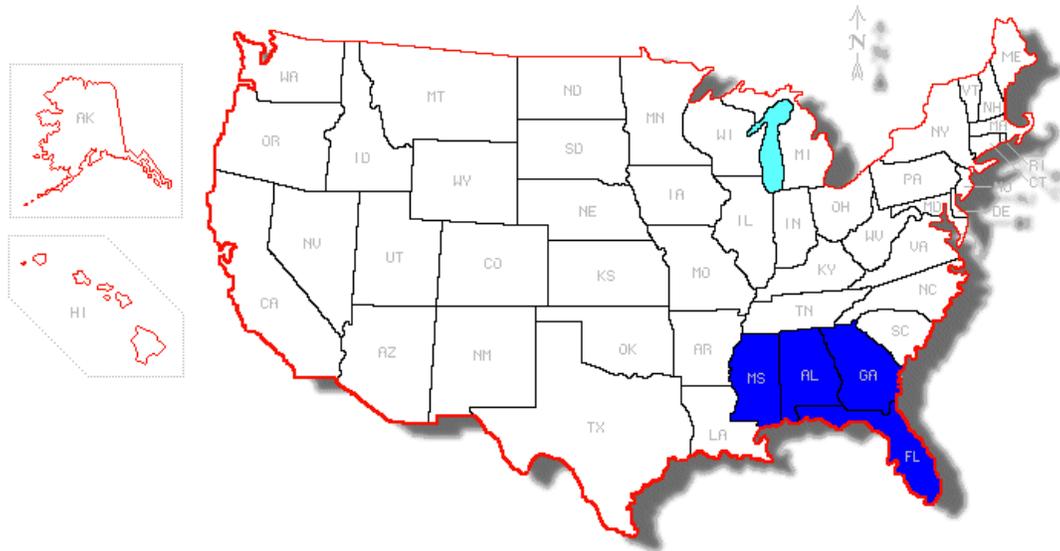
- **Total Sports Participation**
- **Total Sports Team Participation**
- **Sports Participation by State**
- **Sports Participation by Household Income**
- **Total Sports Participation by Age**

Understanding the above demographics of youth and amateur athletics will give valuable insight to the effect that the sports will have on the viability of the proposed youth complex in Charlotte County. Participation levels are the main driving force behind tournaments and camps. The more participants in a given sport, particularly within the regional footprint, the more potential participants and teams from which the complex can draw. Breaking this down even further, it is important to understand how many of these participants fit the age range of the proposed programming at the complex; principally 18

¹ Sporting Goods Manufacturers of America. “Sports Participation in America”. Pages 10-11.

and under. A final factor in estimating the number of potential participants and visitors to the proposed complex is an understanding of how many members of the established target market have the financial wherewithal to attend the events and programs offered.

Figure 2.1: Youth Complex Regional Footprint



Youth Baseball

Baseball is a perfect example of the trend towards younger participation rates, with approximately two million boys and girls aged five or younger enrolled each year in T-ball programs across America.² High school and college participation rates are steady with 15,786 high schools fielding baseball teams and with 472,644 high school baseball players registered nationally. Additionally, there are 910 college baseball teams affiliated with the National Collegiate Athletic Association (NCAA) and 30,365 student-athletes participating in the game of baseball.³

Today's youth are willing to put forth the hard work and dedication associated with baseball and a variety of other team sports. Young athletes look at the accomplishments of role models such as Cal Ripken, Jr. or Albert Pujols and strive to reach similar accomplishments during their "careers," regardless of how long their playing days last. This has driven the need for year-round sports participation, professional instruction, high levels of competition and state-of-the art youth complexes.⁴

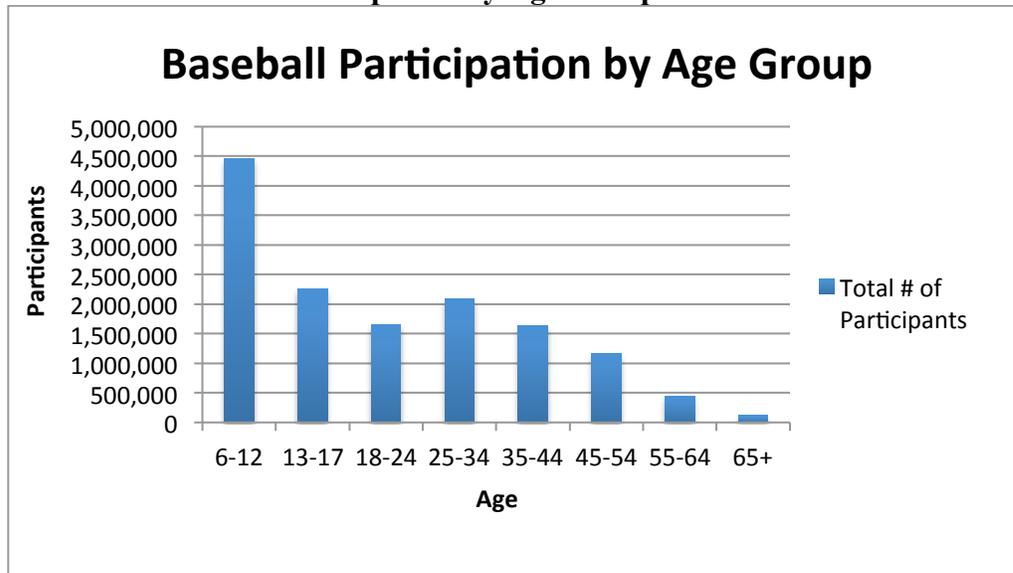
² Sporting Goods Manufacturers of America. "Sports Participation in America". Pages 10-11.

³ Sports Business Research Network: Market Research/Demographics Intercollegiate/Interscholastic Participation 1993-2010. <http://sbrnet.com/research.asp?subRID=570> October 11, 2011

⁴ Land & Leisure, Inc. "Preliminary Analysis Proposed Sports Complex Myrtle Beach, SC." January 2003.

According to the most recent edition of the United States Census Bureau’s Statistical Abstract of the United States (2010), approximately 4.48% of the entire United States population participates in the sport of baseball. There are approximately 12.5 million baseball participants in the United States with the majority under the age of 24. Approximately 62.0% of all baseball participants are under the age of 24 and roughly 50.0% of all baseball participants are under the age of 17. Chart 2.1 provides a complete age breakdown of baseball participation in the United States⁵.

Chart 2.1: Baseball Participation by Age Group



Source: SGMA

Youth Baseball Affiliations

There are several major youth baseball and softball organizations in the United States and across the world. The dominant youth organization is Little League. Babe Ruth Baseball and PONY (Protect Our Nations Youth) baseball are the second and third most prominent youth organizations with leagues in the United States and abroad.

Little League Baseball

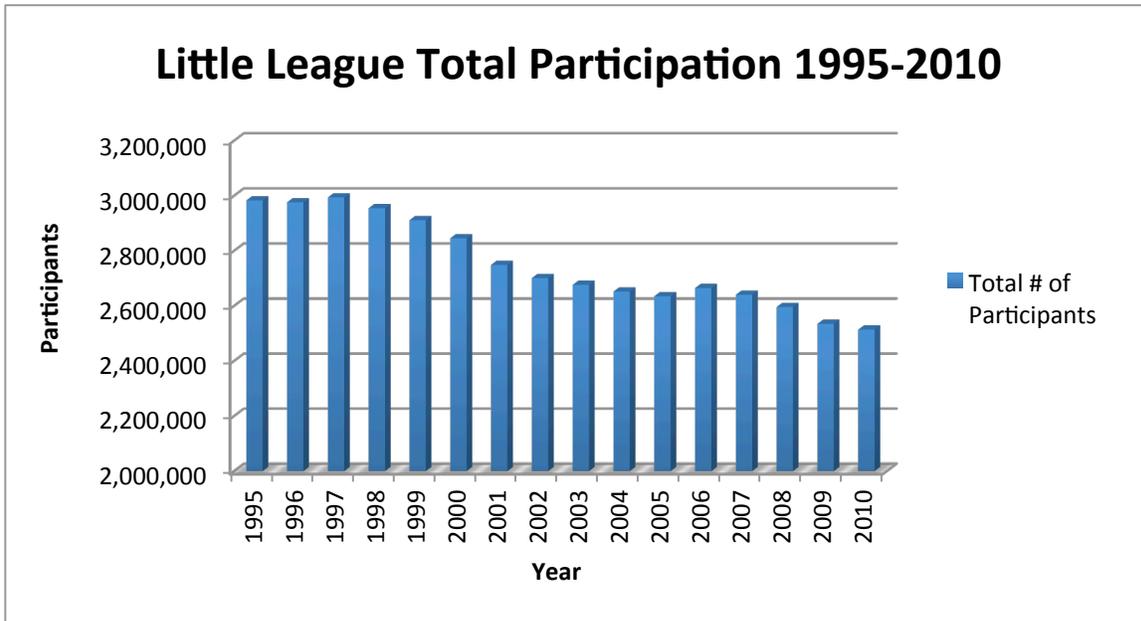
Little League is a non-profit membership organization with leagues designed to provide programming for boys and girls ages 5-18. Little League participation peaked in 1997 at 2,993,760 total participants, but has steadily declined since that year. In 2010, there were 7,123 leagues across the nation, with 2,168,850 baseball players and 344,910 softball players. Chart 2.2 below shows total Little League participation from 1995-2010.⁶

⁵ Sports Business Research Network? Market Research/Demographics Baseball(Total)
<http://sbrnet.com/research.asp?subRID=46#babp9> October 11, 2011

⁶ <http://www.littleleague.org/learn/about/historyandmission/aroundtheworld.htm>

Chart 2.2: Little League Total Participation 1995-2010

Little League is comprised of five regions, Florida being in the Southeastern Division. The Southeastern division also includes Alabama, Georgia, North Carolina, South



Carolina, Tennessee, Virginia, and West Virginia.

The baseball programming begins for boys and girls at the age of 5 and 6 with T-ball, played on a 50 or 60-foot baseball diamond. Minor League is the next step up for boys and girls between the ages of 7 and 12. The Minor League division uses 60-foot diamonds. More advanced boys and girls between the ages of 9 and 12 years play in the Little League division of programming. The 9-10 year old division participates in state tournaments while the 11-12 year old division participates in International tournaments. Boys and girls between the ages of 13 and 14 play in the Junior League with regulation size fields. Senior League is for children ages 14-16 and the Big League is for boys and girls ages 16-18.

In addition to baseball programming, Little League also offers softball programming options for boys and girls. There are separate divisions of softball for boys and girls but the breakdown of age groups and divisions are the same as the baseball programming. All softball programming is conducted on 60-foot diamonds. Softball does not have to be played on skinned infields, but that is the preferred playing surface⁷.

Babe Ruth Baseball

The Babe Ruth Baseball program began more than 50 years ago. The first league was named Little Bigger League and then renamed to Babe Ruth Baseball when Claire Ruth, Babe Ruth’s widow learned of the merits of the organization. In 2010, Babe Ruth

⁷ Little League Baseball Inc., www.littleleague.org.

Baseball has grown to accommodate over 952,602 players on some 50,751 teams in 8,548 leagues.⁸ The Babe Ruth League divides Florida into Northern Florida and Southern Florida. There are seventeen total districts throughout the state with the largest presence in Southern Florida. Through age 18, Babe Ruth is responsible for 15,155 players across 803 teams and 130 leagues. Locally, Babe Ruth District 15 encompasses Charlotte County and as well as Collier, DeSoto, Glades, Lee, Manatee, and Sarasota counties. Despite the strong presence in the state, there is only one league, Englewood Babe Ruth League located in the local area.

Table 2.1: 2011 Englewood Babe Ruth League Teams

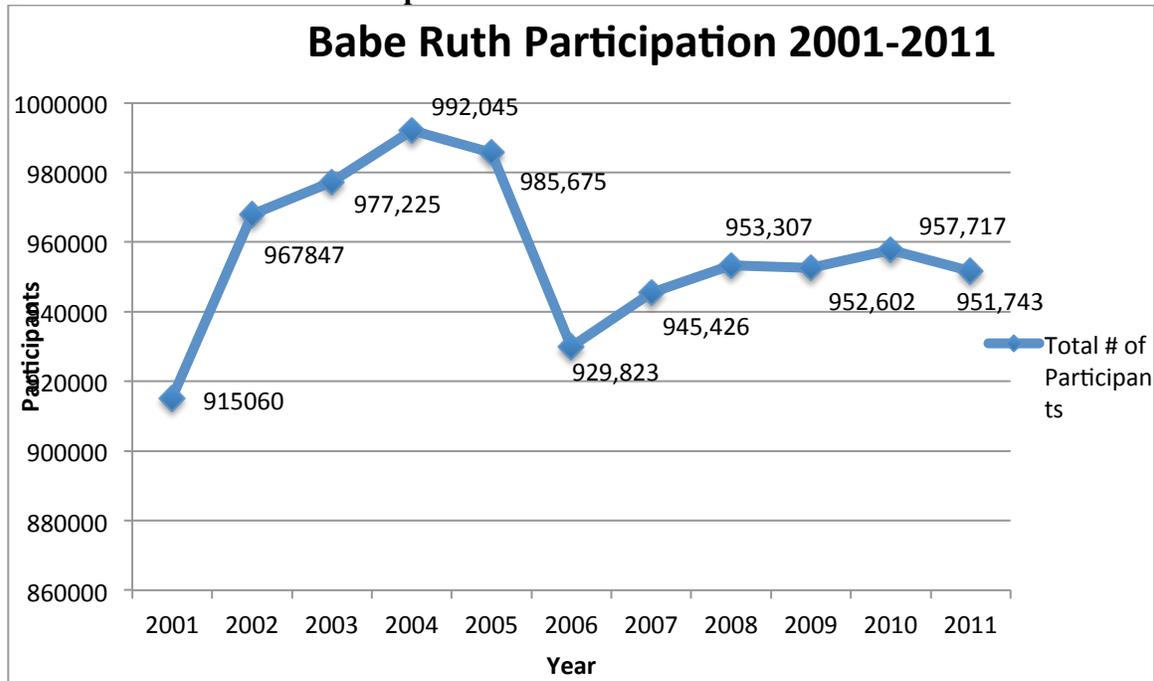
League	T-Ball	Rookies	Minors	Majors	Babe Ruth	Total
Englewood Babe Ruth League	6	4	5	4	3	22

Babe Ruth Baseball provides programming for boys and girls between the ages of 5 and 18. The younger division of Babe Ruth Baseball was renamed Cal Ripken Baseball in 1999. Cal Ripken Baseball includes a T-ball division for boys and girls ages 5-6, Rookie Baseball for boys and girls ages 7-9, Minors for children ages 9 -10 and Majors for children ages 11-12. Cal Ripken Baseball is played on 60-foot baseball diamonds until the Majors who play on 70-foot diamonds with the introduction of leads. The Babe Ruth division is for boys and girls ages 13-18. There are two separate divisions, a division for 13-15 year olds and a division for 16-18 year olds. The Babe Ruth division plays baseball on regulation size fields. While participation in other baseball leagues is declining, participation in the Cal Ripken Division of Babe Ruth Baseball has been growing steadily since Cal's name was attached to the league in 1999.

Chart 2.3, below, shows the growth that has taken place within Babe Ruth Baseball beginning in 2001. Participation has fluctuated up and down since then, although it has been fairly consistent since 2007. Participation currently sits just below these 2002 levels, but still well above the level of the mid-late 90s.

⁸ Babe Ruth Baseball, 2009 Report for Major League Baseball. Acquired July 22, 2010 from Stephen Tellefson, Commissioner Babe Ruth Baseball

Chart 2.3: Number of Participants in Babe Ruth Baseball: 2001-2011



Babe Ruth softball provides programming for girls ages 9 – 18. There are three divisions, a 12 and under division, 16 and under and 18 and under. Babe Ruth softball is played on 60-foot diamonds, skinned infields are not mandatory but are preferred.

PONY Baseball

PONY leagues provide baseball and softball programming for boys and girls between the ages of 5 and 18. There are seven (7) leagues within PONY Baseball: Shetland League (ages 5-6), Pinto League (ages 7-8), Mustang (ages 9-10), Bronco League (ages 11-12), PONY League (ages 13-14), Colt League (ages 15-16) and Palomino League (ages 17-18). Sixty foot diamonds are used for 12 and under leagues. Regulation size diamonds are used for all leagues with children ages 13 and up.

PONY Softball leagues are operated for fast pitch and slow pitch categories. The Pinto League (ages 8 and under), Mustang (ages 10 and under), Bronco (ages 12 and under), PONY (ages 14 and under), Colt (ages 16 and under) and Palomino (ages 18 and under) are the divisions that make up PONY Softball. PONY Softball is played on 60-foot diamonds, with a preference for skinned infields.

Summary

Each of these three leagues, and other youth leagues across the nation, culminate their season with a World Series for the different age divisions. The differences between the leagues are minimal with a slight difference in membership fees and regulations as to the number of games each team can play and which teams they can play against.

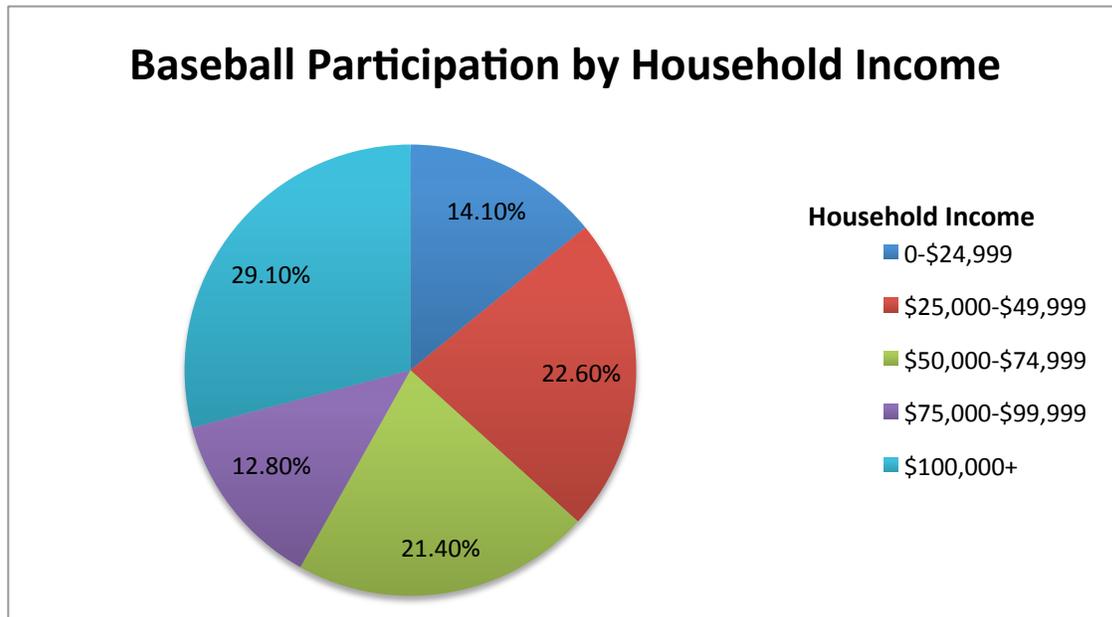
Little League baseball is the dominant player in organized, affiliated youth baseball. However, disenchantment at the grassroots level continues to grow as evidenced by the declining participation numbers. Little League’s participation has continued to decline, as 2010 participation was the lowest since 1990.⁹

Youth Baseball Demographics

While the majority of baseball participants range between the ages of 6 and 24 years old, approximately 63.3% of baseball participants come from households with an income level of \$50,000 or more.¹⁰ According to the 2010 Census, the median household income in the United States was \$50,221. Chart 2.4 provides a breakdown of baseball participation rates according to household income.

Chart 2.4: Baseball Participation by Household Income

Source: SGMA



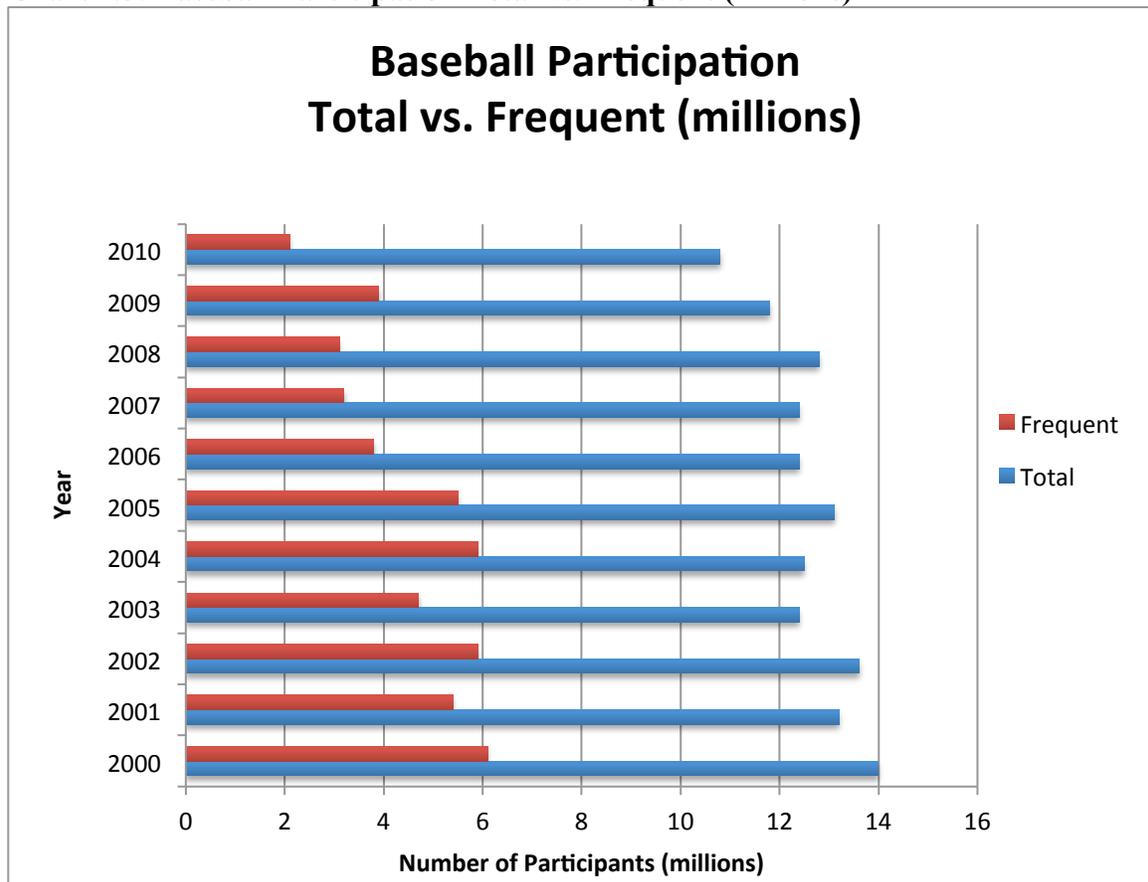
Over the past decade, the growth in youth sports has been mirrored by greater household incomes associated with participants. This rise in household revenue represents an increase in the number of participants who have the wherewithal to pay for and travel to tournaments. The ability for families to travel with participants has led to a continued increase in the size of the average traveling party per participant. In 2010, for each participant in youth baseball tournaments, an estimated 2.5 additional people attended the event. As the number of attendees increases, so do the food and beverage, merchandise, and admission per caps; as well as the overall economic impact on the facility and surrounding community.

⁹ Little League Baseball Inc. “Little League Participation.”
http://www.littleleague.org/media/newsarchive/03_2006/06participation.htm

¹⁰ SGMA

The following chart offers a more in depth look at the number of baseball participants in the United States. In order to understand the impact the growth of baseball and softball will have on the proposed youth complex in Charlotte County, we must gain a better understanding of the number of participants that are most likely to participate in similar tournaments. These participants, frequent participants, are baseball and softball players that play 50 or more days per year.

Chart 2.5: Baseball Participation Total vs. Frequent (millions)



Source: NSGA⁷

To further understand the potential market footprint of the proposed youth complex in Port Charlotte, we must examine the states that will have the greatest potential to provide the most participants to the complex. Ripken Design believes that largest number of expected participants will come from Florida, with secondary participation from Georgia, Alabama, and Mississippi. The following table breaks out the number of baseball players per state as well as the number of participants in the anticipated regional footprint. The percentage of participation represents the share of the overall players in the United States held by each state.

⁷ Sports Business Research Network. <http://sbrnet.com/research.asp?subRID=46> via National Sporting Goods Association

The potential regional footprint of the proposed complex is very strong based on the playing population of Florida alone. All together, the regional footprint comprises 11.39% of the U.S. baseball playing population. Having such a large portion of the playing population located in Florida and its bordering states, and a complex located in close proximity many of the state's population centers is a huge benefit. Although the majority of complex visitors are expected to come from within Florida, larger tournaments can be expected to draw from throughout the Southeast United States.

Table 2.2: 3 Year Average Baseball Participation by State

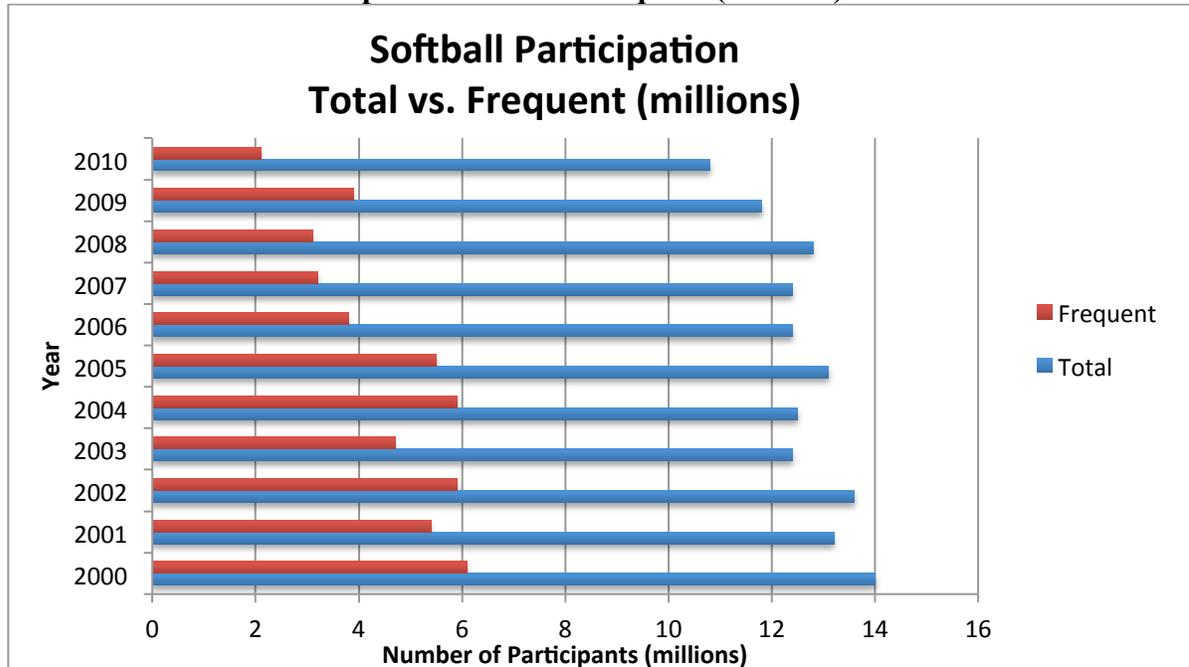
State (% population of U.S.)	% of Players	State (% population of U.S.)	% of Players
Alabama (1.7% of U.S. Pop.)	3.10%	Nebraska (0.6% of U.S. Pop.)	0.20%
Arizona (1.7% of U.S. Pop.)	2.90%	Nevada (0.6% of U.S. Pop.)	0.93%
Arkansas (1.0% of U.S. Pop.)	1.33%	New Hampshire (0.5% of U.S. Pop.)	0.50%
California (11.4% of U.S. Pop.)	12.26%	New Jersey (2.9% of U.S. Pop.)	4.13%
Colorado (1.5% of U.S. Pop.)	1.86%	New Mexico (0.7% of U.S. Pop.)	0.43%
Connecticut (1.3% of U.S. Pop.)	2.66%	New York (7.0% of U.S. Pop.)	6.20%
Delaware (0.3% of U.S. Pop.)	0.23%	North Carolina (2.8% of U.S. Pop.)	3.46%
Florida (5.9% of U.S. Pop.)	3.26%	North Dakota (0.3% of U.S. Pop.)	0.16%
Georgia (2.8% of U.S. Pop.)	4.33%	Ohio (4.4% of U.S. Pop.)	4.16%
Idaho (0.4% of U.S. Pop.)	0.50%	Oklahoma (1.3% of U.S. Pop.)	0.83%
Illinois (4.4% of U.S. Pop.)	6.13%	Oregon (1.3% of U.S. Pop.)	1.20%
Indiana (2.3% of U.S. Pop.)	2.20%	Pennsylvania (4.7% of U.S. Pop.)	5.16%
Iowa (1.1% of U.S. Pop.)	1.16%	Rhode Island (0.4% of U.S. Pop.)	0.40%
Kansas (1.0% of U.S. Pop.)	2.80%	South Carolina (1.4% of U.S. Pop.)	1.06%
Kentucky (1.5% of U.S. Pop.)	1.40%	South Dakota (0.3% of U.S. Pop.)	0.36%
Louisiana (1.6% of U.S. Pop.)	1.13%	Tennessee (2.1% of U.S. Pop.)	1.63%
Maine (0.5% of U.S. Pop.)	0.53%	Texas (6.9% of U.S. Pop.)	5.10%
Maryland (1.9% of U.S. Pop.)	1.00%	Utah (0.7% of U.S. Pop.)	0.83%
Mass. (2.4% of U.S. Pop.)	2.93%	Vermont (0.2% of U.S. Pop.)	0.13%
Michigan (3.7% of U.S. Pop.)	3.26%	Virginia (2.5% of U.S. Pop.)	1.06%
Minnesota (1.8% of U.S. Pop.)	1.63%	Washington (2.2% of U.S. Pop.)	2.46%
Mississippi (1.0% of U.S. Pop.)	0.70%	West Virginia (0.7% of U.S. Pop.)	0.50%
Missouri (2.1% of U.S. Pop.)	2.30%	Wisconsin (2.1% of U.S. Pop.)	2.33%
Montana (0.4% of U.S. Pop.)	0.20%	Wyoming (0.2% of U.S. Pop.)	0.33%

Source: 2011 Sports Business Research Network

Softball

While the overall numbers of softball players in 2010 has decreased from 2009, softball remains one of the fastest growing competitive sports in the United States. Whereas national softball tournaments were few and far between as recently as five (5) years ago, the competitive tournament circuit is making strides to catch baseball, both in the number of tournaments offered and the amount of dollars spent on tournaments. If constructed correctly, a baseball complex can take advantage of all levels of softball tournament play; from fast pitch youth to competitive adult tournaments. The chart below shows the total number of softball participants in the nation versus the number of “frequent” participants in the sport. A “frequent” participant is defined as a person who participates in softball more than 50 days per year.

Chart 2.6: Softball Participation Total vs. Frequent (millions)



Much like baseball, the number of softball games played and the amount of annual tournaments and tournament travel has increased. The highest participation levels in the game are between the ages of 7 and 24 (47.3%), which are also the age levels that are most likely to attend tournaments with a traveling party¹¹.

¹¹ Sports Business Research Network. <http://sbrnet.com/research.asp?subRID=399> Softball Participation (Total)

Chart 2.7: Softball Participation by Age Group

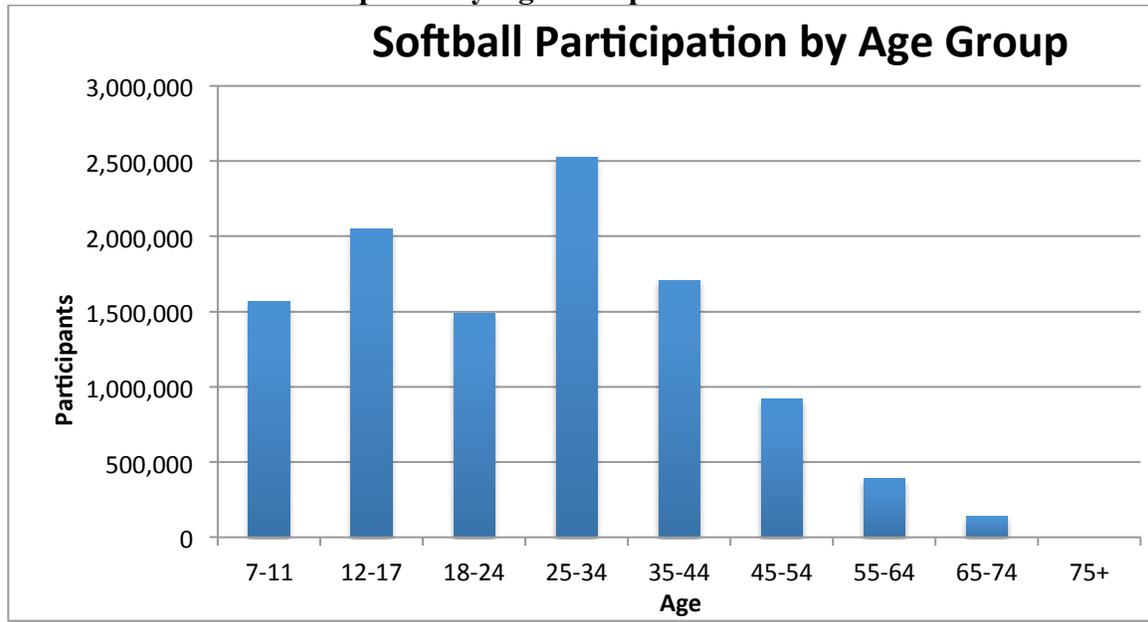
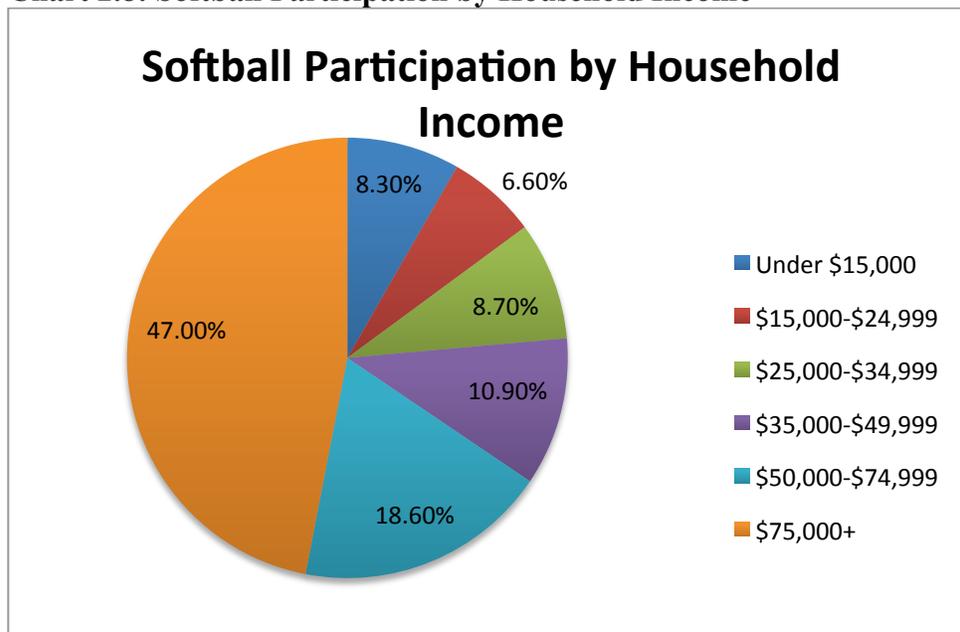


Chart 2.8: Softball Participation by Household Income



Source: SBRnet

The family income associated with softball participants is another trend that explains how softball participation rates can continue to decrease while softball tournament participation continues to increase dramatically. As the above chart shows, nearly 50% of softball participants have household incomes above \$75,000, a mark only slightly lower than the percentage of baseball participants with the same household income level.

Table 2.3: 3-Year Average 2008-2010 Softball Participation by State

State	%	State	%
Alabama (1.7% of U.S. Pop.)	1.23%	Nebraska (0.6% of U.S. Pop.)	0.86%
Arizona (1.7% of U.S. Pop.)	1.53%	Nevada (0.6% of U.S. Pop.)	0.53%
Arkansas (1.0% of U.S. Pop.)	0.80%	NH (0.5% of U.S. Pop.)	0.45%
California (11.4% of U.S. Pop.)	15.20%	New Jersey (2.9% of U.S. Pop.)	2.86%
Colorado (1.5% of U.S. Pop.)	0.73%	New Mexico (0.7% of U.S. Pop.)	0.30%
Connecticut (1.3% of U.S. Pop.)	1.25%	New York (7.0% of U.S. Pop.)	7.86%
Delaware (0.3% of U.S. Pop.)	0.26%	North Carolina (2.8% of U.S. Pop.)	2.83%
Florida (5.9% of U.S. Pop.)	3.60%	North Dakota (0.3% of U.S. Pop.)	0.50%
Georgia (2.8% of U.S. Pop.)	4.36%	Ohio (4.4% of U.S. Pop.)	3.90%
Idaho (0.4% of U.S. Pop.)	0.30%	Oklahoma (1.3% of U.S. Pop.)	1.23%
Illinois (4.4% of U.S. Pop.)	5.40%	Oregon (1.3% of U.S. Pop.)	1.03%
Indiana (2.3% of U.S. Pop.)	1.76%	Pennsylvania (4.7% of U.S. Pop.)	4.26%
Iowa (1.1% of U.S. Pop.)	1.63%	Rhode Island (0.4% of U.S. Pop.)	0.35%
Kansas (1.0% of U.S. Pop.)	0.53%	South Carolina (1.4% of U.S. Pop.)	1.33%
Kentucky (1.5% of U.S. Pop.)	1.43%	South Dakota (0.3% of U.S. Pop.)	0.30%
Louisiana (1.6% of U.S. Pop.)	1.06%	Tennessee (2.1% of U.S. Pop.)	1.70%
Maine (0.5% of U.S. Pop.)	0.26%	Texas (6.9% of U.S. Pop.)	6.66%
Maryland (1.9% of U.S. Pop.)	1.40%	Utah (0.7% of U.S. Pop.)	1.46%
Mass. (2.4% of U.S. Pop.)	1.56%	Vermont (0.2% of U.S. Pop.)	0.45%
Michigan (3.7% of U.S. Pop.)	4.10%	Virginia (2.5% of U.S. Pop.)	1.70%
Minnesota (1.8% of U.S. Pop.)	3.33%	Washington (2.2% of U.S. Pop.)	1.66%
Mississippi (1.0% of U.S. Pop.)	1.70%	West Virginia (0.7% of U.S. Pop.)	0.23%
Missouri (2.1% of U.S. Pop.)	2.60%	Wisconsin (2.1% of U.S. Pop.)	2.40%
Montana (0.4% of U.S. Pop.)	0.15%	Wyoming (0.2% of U.S. Pop.)	0.20%

Softball exhibits strength in the market as a relative hotbed for softball participation and growth. Florida is tied with Texas as the 4th largest state participation in the country. With the recent success of the University of Florida Softball team, the region’s softball success is beginning to lure teams from across the country for tournament play. Ripken Design believes that a strong market for softball could allow for supplemental programming in that sport. While the operating entity may prefer not to run softball in order to cultivate an experiential baseball atmosphere, the opportunity will be available should operational preferences change.

Summary

The popularity of baseball and softball across the nation, the strong number of participants in the proposed regional footprint, and a location that can draw from heavily from the Tampa Bay-Sarasota-Fort Myers region highlight the ability of a well-run complex in Port Charlotte to make an immediate impact.

With a strong sales and operations staff to compliment a first-class facility, there is the potential to make Charlotte County a tournament destination for the thousands of athletes in Florida as well as others in the region. With the correct programming and layout, the facility will also benefit the overall quality of life for residents of Charlotte County. Based on the market and the strong regional support it appears as though a baseball/softball tournament complex is viable in Charlotte County depending on the local participation conditions and existing competitive fields. As an additional benefit, this facility would still serve to meet the needs of all local residents, while providing enough total revenue to finance ongoing operations of the complex. Subject to scheduling, the proposed complex would be made available local leagues and groups. Given the current shortage of fields in Charlotte County, the additional high quality fields will be a welcome addition to the community. Furthermore, if the fields are constructed with synthetic turf, the fields will be able to handle more activity than the typical park.

III. MARKET ANALYSIS

Port Charlotte, Charlotte County, FL is located approximately 48 miles south of Sarasota and 77 miles north of Fort Myers, the two largest adjacent cities. Although Charlotte County itself is not a highly populated area (159,978), Sarasota (702,281) and Ft. Myers (618,754) are within about an hour. Furthermore, Tampa-St. Petersburg Metropolitan area (2,783,243) is about two hours north of Charlotte County.

This purpose of this section is to ascertain the demographic, social, and economic forces that shape the Port Charlotte market, while assessing the ability of a new baseball/softball complex to attract visitors from within the county and region at large.

Punta Gorda MSA

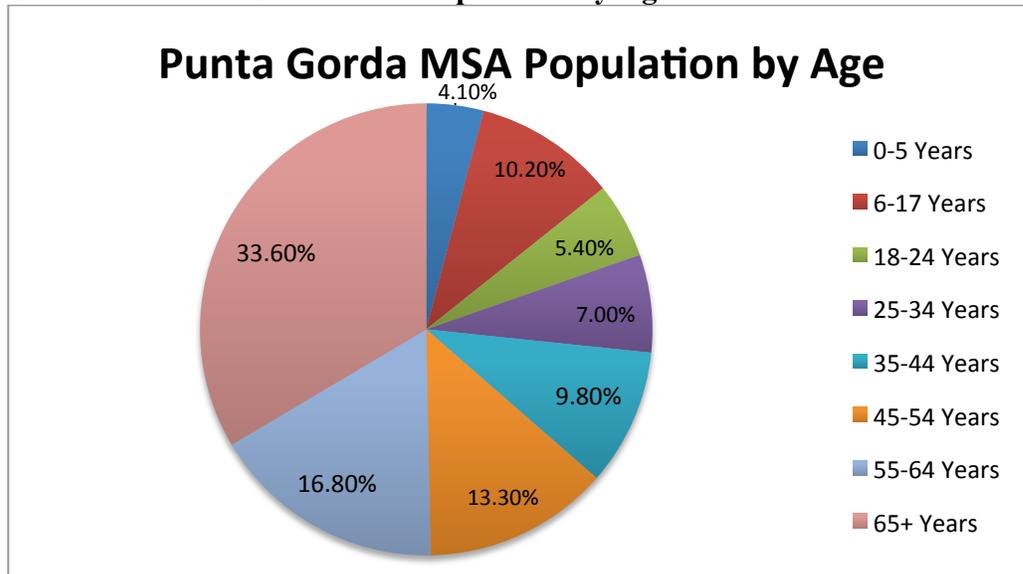
The Metropolitan Statistical Area (MSA) defines a boundary used to measure the population of a metropolitan area around a major city. Port Charlotte is located in the middle of Charlotte County, and is included in the Punta Gorda Metropolitan Statistical Area (MSA). The Punta Gorda MSA is made up entirely of Charlotte County and does not cross into surrounding counties. The area sits on the Gulf of Mexico and is bordered by six (6) counties in total. These counties include Lee and Hendry counties to the south, Glades and Highlands counties to the east, as well as DeSoto and Sarasota counties to the north.

The Punta Gorda MSA is the 290th largest MSA in the United States and is the 20th largest in Florida. From a national perspective, Punta Gorda ranks in between Pueblo, CO and Pascagoula, MS. Within the state of Florida, the Punta Gorda MSA population is positioned between the Panama City-Lynn Haven-Panama City Beach MSA and the Homosassa Springs MSA.

Population

According to the 2010 Census data, the Punta Gorda MSA has a population of 159,978. That is a 13.0% increase from the 2000 census. Florida has a long tradition of attracting retirees and other older segments of the population, due to its favorable weather and amenities. As a result, Florida's population is skewed towards older age groups. This holds true in the Punta Gorda MSA where only 14.3% of Charlotte County's population is under the age of 18. This is significantly lower than the national population where 24.3% are below the age of 18. Furthermore, 34.3% of Charlotte County's population is over the age of 65 compared to the 12.9% of the United States population that is over 65.

Chart 3.1: Punta Gorda MSA Population by Age



Despite the relatively old age distribution in the Punta Gorda MSA, the total population has increased in the last ten years, and is projected to continue rising over the next thirty years.¹² These projections are supported by migration data. The American Community Survey estimated the migration to and from the Punta Gorda MSA from 2005-2010. Although migration to the area has dipped since 2008, that is the case throughout the country, and is expected to recover as the economy continues to improve.

Table 3.1: Punta Gorda MSA Migration Statistics 2005-2009

	In-Migration	Out-Migration	Net
2005	13,758	9,972	3,786
2006	13,708	12,695	1,013
2007	11,689	10,173	1,516
2008	10,337	9,617	720
2009	12,144	10,723	1,421

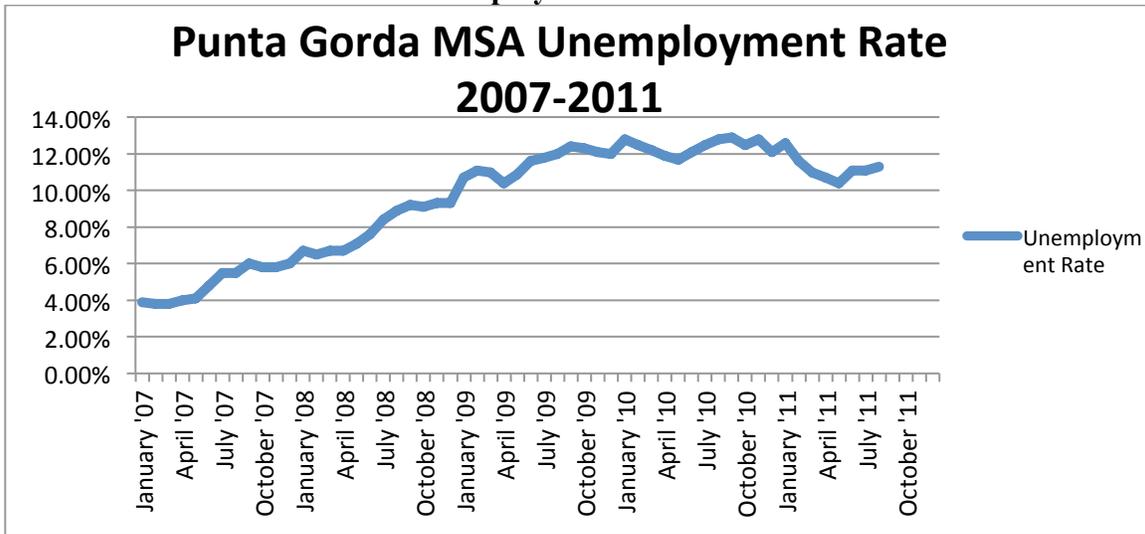
Source: US Census: American Community Survey

Households

From 2005-2009 there were an estimated 72,646 households in Charlotte County with 2.11 persons per household. Like the rest of the country, the Punta Gorda MSA has been deeply affected by the current economic climate. The following Chart shows the unemployment rate for the MSA dating back to January of 2007. The unemployment rate peaked in January of 2010 at 13.8% but dropped as low as 10.4% in May of 2011. However, since May, the figure has crept back up to 11.2%.

¹² http://easidemographics.com/cgi-bin/free_reports.exe

Chart 3.2: Punta Gorda MSA Unemployment Rate 2007-2011



The median income of these households in 2010 was \$50,806. This is more than the Florida median household income (\$44,755), and slightly higher than the national median household income of \$50,221. As shown in the *Participation Trends* Section, the 68.3% of frequent baseball participants come from households with an income of \$50,000 or higher. The presence of above average income households in the MSA is an indication that households in the local market have the means to support a new facility.

Demographic measures like population, age distribution, and income are important in assessing a market’s ability to sustain a baseball complex. Table 3.2 presents these variables for Charlotte County and selected high-quality Comparable Facilities that have been successful elsewhere in the United States. The Table is divided into three categories based on the type of programming offered. The first set considered are “tournament complexes” where the majority of their programming comes from weekend and holiday tournaments. The second group of complexes below is “destination complexes,” which host teams for weeklong tournaments. The third group of facilities compares the Punta Gorda MSA with other venues that host both MLB Spring Training and amateur tournament programming.

Table 3.2: Comparable Complex Demographics

Among the “tournament complexes” listed above, the Punta Gorda MSA is by far the smallest local market by population, with the exception of Cooperstown, NY. The local market also performs poorly relative to the other complexes in age distribution and income. While the Punta Gorda MSA does not perform well in this comparison, it is important to note that the Punta Gorda MSA is significantly smaller in size than the other local markets.

Tournament Complex	Location	MSA Center	Pop.	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Ripken Experience-Maryland	Aberdeen, MD	Baltimore	2,727,684	22.90%	\$73,038	\$92,412
Cypress Mounds	Baton Rouge, LA	Baton Rouge	802,484	24.70%	\$53,249	\$69,384
East Cobb Baseball Complex	Marietta, GA	Atlanta	5,268,860	26.60%	\$65,207	\$77,996
Old Settlers Park	Round Rock, TX	Austin	1,716,289	25.30%	\$66,285	\$83,589
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176
Destination Complex	Location	MSA Center	Pop.	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Ripken Experience-Myrtle Beach	Myrtle Beach, SC	Myrtle Beach	269,291	20.10%	\$49,218	\$61,906
Cooperstown Dreams Park	Milford, NY	Oneonta	62,259	18.90%	\$49,964	\$65,035
ESPN Wide World of Sports	Kissimmee, FL	Orlando	2,134,411	23.10%	\$57,304	\$68,045
Cocoa Expo Sports Complex	Cocoa, FL	Melbourne	543,376	19.80%	\$56,321	\$70,203
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176
Spring Training Complex	Location	MSA Center	Pop.	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Lee County Sports Complex	Fort Myers, FL	Fort Myers	618,754	19.50%	\$59,270	\$70,486
Roger Dean Sports Complex	Jupiter, FL	Port St. Lucie	424,107	20.70%	\$55,981	\$67,841
Surprise Baseball Complex	Surprise, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Peoria Sports Complex	Peoria, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Salt River Fields	Scottsdale, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176

When compared to other successful “destination complexes,” the Punta Gorda MSA is much closer to the comparable markets. Although it ranks last in total population, the gap is much smaller. The local area’s income figures are very comparable to the other markets viewed in this subset. The Punta Gorda MSA is very similar statistically to the Myrtle Beach MSA.

While it is important to compare Charlotte County with other successful Spring Training facilities, at the MSA level the comparison is skewed by the difference in MSA. The three Arizona complexes are each located in the Phoenix MSA, a much larger metropolitan area than any other local market except for Atlanta (East Cobb). Although Charlotte County ranks last in each category, it is competitive, especially with median household and family income.

Surrounding Counties

For a new complex in Port Charlotte to be successful, it will have to draw users from throughout the Punta Gorda MSA and surrounding counties. Charlotte County and the bordering counties have a population of 1.2 million people, and well over 2.5 million people when the Tampa area is included. Of these, approximately 18.8% are under the age of 18, giving a complex in Port Charlotte an estimated 485,820 people under the age of 18 from which to draw locally. This local base comprises an important user group for tournaments, camps, and other events. Its relatively sizeable potential user pool is a strength of a Port Charlotte location.

Fort Myers-Cape Coral MSA

The Fort Myers-Cape Coral MSA is made up entirely of Lee County and borders Charlotte County to the south. The 2010 population is estimated at 618,754, which is an increase of 40.3% from 2000 to 2010. Of that total population, 20.4%, or 126,226 people, are under the age of 18. The national percentage of the population under the age of 18 is 24.0%. Furthermore, 22.7% of the Lee County population is over the age of 65, a mark well above the national figure of 12.9%.

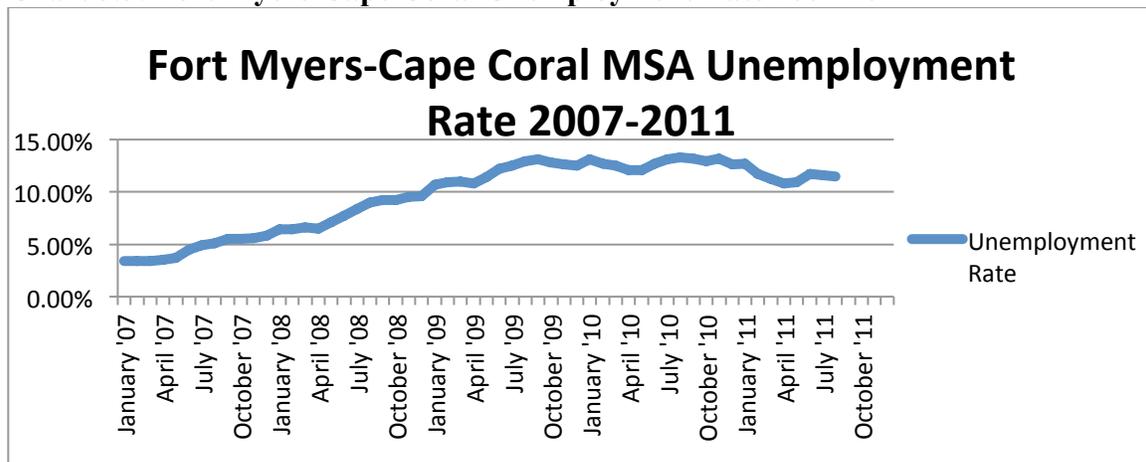
Similar to Charlotte County, Lee County has seen its population increase significantly over the course of the past decade. Table 3.3 below shows the migration to and from Lee County from 2005-2010. Steady net gains in population supports the consistent population growth.

Table 3.3 Migration Statistics Cape Coral-Fort Myers MSA 2005-2009

Year	In-Migration	Out-Migration	Net
2005	43,442	37,131	6,311
2006	46,778	41,952	4,826
2007	38,437	35,720	2,717
2008	37,344	31,196	6,148
2009	33,039	30,098	2,941

The median household income in Lee County is \$45,624. This figure is slightly higher than the Florida median household income (\$44,755), but slightly below the national figure (\$50,221). Despite having a higher median income than Charlotte County, Lee County was hit relatively hard by the economic recession. Chart 3.3 below shows the MSA’s unemployment dating back to January of 2007. Although, unemployment remains well above the pre-recession rate, it has decreased in recent months.

Chart 3.3: Fort Myers-Cape Coral Unemployment Rate 2007-2011



The Fort Myers-Naples area hosts Spring Training for the Boston Red Sox and Minnesota Twins, and is the home of the Fort Myers Miracle. In addition to the baseball attractions, Sanibel and Captiva Islands are popular tourist destinations and located just offshore. The islands feature some of the nicest beaches in the country.

Sarasota-Bradenton-Venice MSA

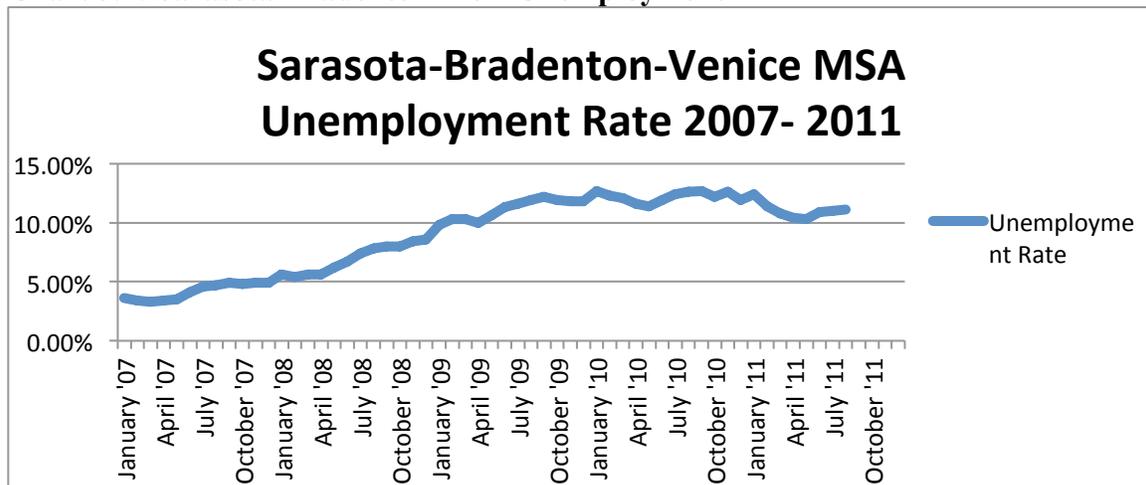
The Sarasota-Bradenton-Venice MSA is located directly to the north of Charlotte County and encompasses both Manatee and Sarasota Counties. Sarasota County and Manatee County are similar in size, although Sarasota County has a slightly larger population. In 2010, the total population of the MSA was estimated to be 702,281. From this total population, approximately 18.4%, or 128,943 people, are under the age of 18. Comparatively, 21.3% of Florida’s population is under the age of 18 and 24.0% of the United States population is under 18.

Table 3.4: Sarasota-Bradenton-Venice MSA Migration Statistics 2005-2009

Year	In-Migration	Out-Migration	Net
2005	54,964	43,570	11,394
2006	45,393	33,757	11,636
2007	47,218	35,559	11,659
2008	42,991	32,449	10,542
2009	41,400	30,754	10,646

The median household incomes for Sarasota County and Manatee County are very similar. In 2009, median household incomes were \$45,953 and \$45,565 respectively. Both of these figures are above the Florida figure but below the national median. As a whole, the unemployment rate for the MSA has hovered around 11% for much of 2011. In August of 2011, the unemployment rate in the MSA was reported to be 11.1% according to the U.S. Department of Labor.

Chart 3.4: Sarasota-Bradenton MSA Unemployment



The Sarasota-Bradenton-Venice MSA also has a strong corporate base that may be approached for complex sponsorship or individual teams, corporate leagues, and private events. There are 52 private companies with over 100 employees in Sarasota County alone. Manatee County is also home to many private and public employers including Tropicana Products Inc. and the corporate headquarters for Beall’s Inc.

Sarasota’s greatest attractions are its beautiful public beaches. Among these, the best is Siesta Key, recently named the “Best Beach in the Nation”.¹³ Much like other cities across the country, tourism figures declined with the economy, but Sarasota has seen an increase in tourism throughout 2011. Sarasota is also the Spring Training home of the Baltimore Orioles and is about an hour drive from the new LegoLand Amusement Park in Winter Haven, FL.

Tampa-St. Petersburg-Clearwater MSA

The Tampa-St. Petersburg-Clearwater MSA is one of the largest statistical areas in the state and is made up of parts of four different counties. These counties include:

- Hillsborough County
- Pinellas County
- Pasco County
- Hernando County

¹³ <http://www.heraldtribune.com/article/20111114/ARTICLE/111119867>

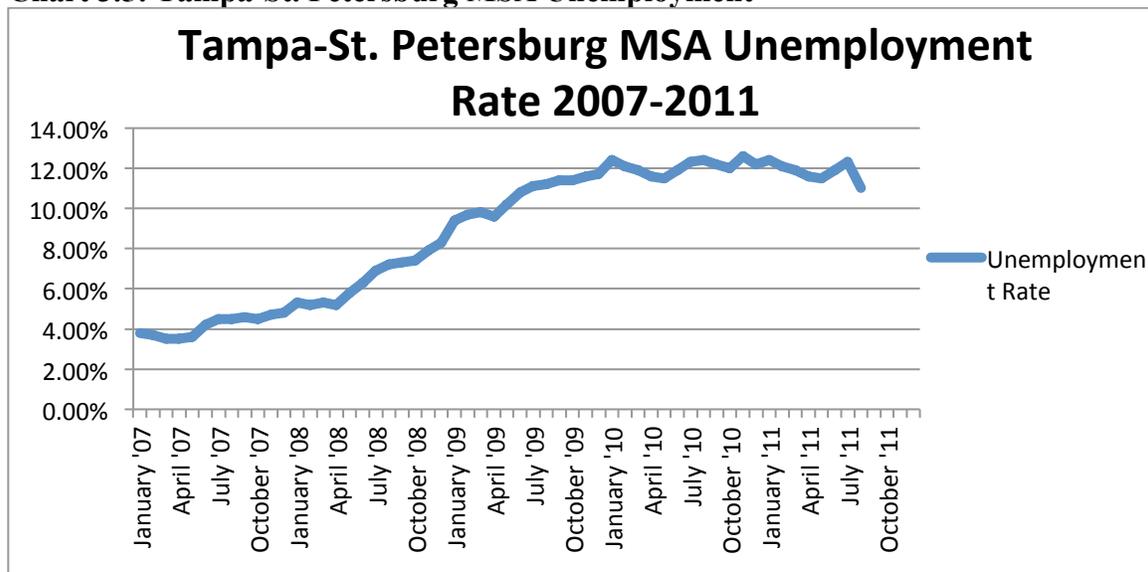
The total population of the MSA is estimated to be 2,783,243 with approximately 21.2% of the total population under the age of 18. Conversely, 17.2% of the population is over the age of 65.

Table 3.5: Migration Statistics for Tampa-St. Petersburg MSA 2005-2009

Year	In-Migration	Out-Migration	Net
2005	188,948	129,082	59,866
2006	184,250	126,468	57,782
2007	164,148	102,923	61,225
2008	152,268	88,329	63,939
2009	154,400	96,312	58,088

The Tampa-St. Petersburg Metropolitan area is a major corporate city and despite being about two hours north, there is some potential for corporate sponsorship. The median household income in the MSA is \$53,324, slightly above the national figure.

Chart 3.5: Tampa-St. Petersburg MSA Unemployment



The presence of the Tampa Bay Rays Spring Training in Port Charlotte provides an opportunity to attract Tampa-St. Petersburg area businesses that may be attracted by shared sponsorship opportunities. Major corporate sponsors of the Rays include the St. Petersburg Times, MetroPCS Communications, Pepsi, Anheuser-Busch, and Tropicana. These existing relationships can be leveraged to create new sponsorship opportunities for a new complex in Port Charlotte.

The Tampa-St. Petersburg MSA also features the most tourist attractions along the West Coast of Florida. Aside from the beaches, the area features professional baseball and football, in addition to the Spring Training home of the New York Yankees. The Tampa metropolitan area also features a Busch Gardens Amusement Park and Adventure Island Amusement Park, with a LegoLand Park about 45 minutes away.

Table 3.6: County Demographics - Summary

County	Population	Pop. Under 18	Median Household Income	Median Family Income	Households >50,000
<i>Punta Gorda MSA</i>					
Charlotte County	159,978	14.30%	\$50,806	\$62,176	30,664
<i>Fort-Myers-Cape Coral MSA</i>					
Lee County	618,754	19.50%	\$59,270	\$70,486	117,288
<i>Sarasota-Bradenton-Venice MSA</i>					
Sarasota County	379,448	15.80%	\$57,506	\$73,350	74,601
Manatee County	322,833	20.60%	\$55,973	\$69,060	58,479
<i>Tampa-St. Petersburg-Clearwater MSA</i>					
Pinellas County	916,542	17.70%	\$51,222	\$68,069	154,768
Hillsborough County	1,229,226	24.00%	\$57,099	\$70,473	199,162
Pasco County	464,697	21.20%	\$50,766	\$63,818	78,552
Hernando County	172,778	19.80%	\$48,382	\$60,016	29,496

Charlotte County Buying Power

The Buying Power Index, calculated by *Sales & Marketing Magazine's Survey of Buying Power*, gauges the spending power of a given area based on retail sales, population, and effective buying income. By assessing these factors, the index calculates an area's buying power as a percentage of the total national buying power. For instance, the United States has a BPI of 100. The New York-Newark-Edison area, #1 in BPI has a value of 6.8202, indicating that 6.8% of the nation's buying power is located in that area. Table 3.4 demonstrates the Punta Gorda MSA's Buying Power relative to other state localities. The Punta Gorda MSA ranks 229th in the United States in total BPI and is 18th in the state of Florida. Punta Gorda MSA has a total EBI of 340,880,000 and a median household EBI of 30,665. The median household EBI in the United States was 42,303.

Table 3.7: Buying Power Index of Comparable Facilities

Name	MSA	Median Hhld EBI	Total MSA EBI	125 Mile EBI	250 Mile EBI	Total Regional EBI
Ripken Experience-Maryland	Baltimore	50,989	67,739,957,500	559,424,887,500	741,669,175,000	1,301,094,062,500
Ripken Experience-Myrtle Beach	Myrtle Beach	36,744	5,279,590,000	75,568,882,500	204,145,830,000	279,714,712,500
Cooperstown Dreams Park	Oneonta	34,773	1,027,042,500	217,716,400,000	1,047,457,682,500	1,265,174,082,500
Old Settler's Park	Austin	47,520	38,012,472,500	204,995,040,000	243,729,112,500	448,724,152,500
Cypress Mounds	Baton Rouge	39,980	14,605,707,500	70,831,268,750	88,371,385,000	159,202,653,750
East Cobb Baseball Complex	Marietta	46,949	120,789,515,000	279,403,915,000	285,986,515,000	565,390,430,000
ESPN Wide World of Sports	Kissimmee	43,123	45,208,590,000	205,786,112,500	222,290,452,500	428,076,565,000
Cocoa Expo	Melbourne	42,421	12,412,160,000	230,099,422,500	208,195,977,500	438,295,400,000
Charlotte County	Punta Gorda	39,796	3,825,115,000	180,955,967,500	210,990,380,000	391,946,347,500

Table 3.8: Punta Gorda MSA Buying Power (State Rank, National Rank)

Total Retail Sales	\$2,508,518,981 (18 th , 262 nd)
Total EBI	\$3,825,115,000 (18 th , 209 th)
Median Household EBI	\$39,796 (13 th , 244 th)
Buying Power Index	.0565 (18 th , 229 th)

Again, it is important to note that the Punta Gorda MSA is a relatively small area wedged between much larger populations centers, a fact supported by the Buying Power Index. The Bradenton-Sarasota-Venice area and the Cape Coral-Ft. Myers area have the 5th and 6th greatest BPI in Florida, respectively. Furthermore, their BPI's are ranked 63rd and 69th nationally. The local area including and surrounding Charlotte County is an economically diverse region. Table 3.7 compares the EBI strength of Charlotte County to the markets of major comparable facilities elsewhere in the United States. This table examines the buying power of each facility's regional market.

The small size of the Punta Gorda MSA implies a weak local market relative to other complexes. Although the MSA ranks second to last in the local market, it is well above Cooperstown Dreams Park and just below Ripken Experience-Myrtle Beach. While the MSA numbers are unremarkable, the buying power of the 125-mile ring, a better measure of a facility's feasibility, is only slightly below many of the comparable complexes and well ahead of Cypress Mounds and the Ripken Experience-Myrtle Beach. At the 125-250 mile ring, Charlotte County is very competitive with all of the comparable complexes that do not include the New York City Market (Ripken Experience-Maryland, Cooperstown Dreams Park). The strength of the Charlotte County market in this range is remarkable because much of this range covers the Gulf of Mexico, Atlantic Ocean, and the Everglades.

Corporate Strength

In examining the corporate strength of a market, it is necessary to look at the largest employers in the area. A market with a strong private sector is preferred to one laden with government employers, and companies with national brand recognition typically large sponsoring and marketing budgets than those that are locally owned. Given the regional and national appeal of the facility, these sponsors will be more attracted than local companies that will largely be advertising to people from markets they do not serve.

Corporate sponsorship is an integral part of any successful sports complex, as it provides a mutual benefit for both the company and the facility. Sponsorship affords corporations the opportunity to connect with the local community; showcase and highlight new products and services; increase brand recognition; and allow employees and their families to enjoy access to the facility through company events or preferred registration/scheduling opportunities. Similarly, the facility is able to add supplemental revenue to its operations budget, offer first-class products and amenities, and create a symbiotic tie with the local business community.

Major Employers

Table 3.9 below is a list of major employers in Charlotte County. This list includes companies that employ 100 or more employees.

Table 3.9: Major Employers

Company Name	Industry	Employees
Wal-Mart Stores, Inc.	Retail Trade	1,500
St. Joseph Preferred Healthcare Inc.	Healthcare Facility	1,400
County of Charlotte	Legislative Bodies	1,127
County of Charlotte Elementary/Secondary	Legislative Bodies	868
Fawcett Memorial Hospital	Healthcare Facility	840
Port Charlotte HMA, Inc.	Healthcare Facility	700
Punta Gorda HMA, Inc.	Healthcare Facility	680
County of Charlotte Sheriff	Legislative Bodies	550
County of Charlotte School Buses	Legislative Bodies	500
Home Depot U.S.A., Inc.	Retail Trade	450
County of Charlotte Police Protection	Legislative Bodies	427
County of Charlotte Admin of Educational Progr	Legislative Bodies	400
Palm Chrysler Plymouth Dodge Jeep	Retail Trade	300
Winn-Dixie Stores, Inc.	Retail Trade	267
County of Charlotte Public Works	Legislative Bodies	250
Palm Chevrolet-Oldsmobile, Inc.	Retail Trade	230
Punta Gorda Associates	Health Care Facility	230
Sam's West, Inc.	Retail Trade	200
Douglas T Jacobson State Veterans Home	Health Care Facility	200
Dillard's, Inc.	Retail Trade	196
Smugglers Enterprises, Inc.	Arts, Entertainment, & Rec.	185
Caremeridian, LLC	Health Care Facility	160
School Board of Charlotte County	Legislative Bodies	160
Old Punta Gorda Inc.	Other Services	150
County of Charlotte Courts	Legislative Bodies	150
Lowe's Home Centers	Retail Trade	148
Ian McLellan	Construction	135
Sea Crest Health Care Management LLC	Health Care Facility	130
Grant Medical Transportation, Inc	Health Care Facility	125
Bon Secours-St. Joseph Nursing Care	Health Care Facility	125
Kohl's Corporation	Retail Trade	123
Consulate Manadement Company, LLC	Health Care Facility	120
Mariner Health of Port Charlotte	Health Care Facility	120
Golden Corral Corporation	Retail Trade	120
ADK Properties	Healthcare Facility	120
J.C. Penney Corporation	Retail Trade	115
Sears, Roebuck and Co.	Retail Trade	113
Target Corporation	Retail Trade	110
Don Gasgarth Ford, Inc	Retail Trade	110
Charlotte Harbor Land Co	Construction	100
United Postal Service	Legislative Bodies	100
Williams Farms Partnership	Agriculture	100
GMRI, Inc.	Arts, Entertainment & Rec	100
Community of Saint Vincent De Paul	Retail Trade	100
Pik N Run 5, Inc	Other Services	100
LP Port Charlotte LLC	Healthcare Facility	99
Village Place NH LLC	Healthcare Facility	99
Best Buy Co., Inc	Retail Trade	99
Charlotte County Family YMCA	Other Services	99
Englewood Health Care Associates LLC	Healthcare Facility	99

Source: Charlotte County Top 50 Employers List

In addition to a large public sector, Charlotte County has a number of major private employers in the healthcare and retail industries. This creates a number of strong potential sponsorship partners, enhanced by the potential to tap into the network of Tampa Bay Rays sponsors by offering synergistic, complex wide opportunities.

These local and regional employers can play a pivotal role in the success of a new complex through:

- Facility Sponsorships
- Group Outings
- League Play
- Team/Tournament Sponsorships

For example, the Charlotte Stone Crabs have many corporate sponsors, including many from the local area. Local sponsors include Advanced Imaging, Fawcett Memorial Hospital, the Charlotte Sun, and Riverwood Golf Club among others. Furthermore, the presence of the Tampa Bay Rays in the area through Spring Training may attract corporate interest from the Tampa-St. Petersburg area. The Tampa area is the headquarters for thirteen major private corporations such as Publix Super Markets, Raymond James Financial, Inc., and the Home Shopping Network among others.

Transportation

A key component of a successful complex is easy access via interstate highway. While a complex does not necessarily need to be located directly on an interstate, it should be accessible via major roads with minimal turns from the nearest off-ramp.

The proposed location is located approximately 8 miles (10-15 minutes) from the nearest I-75 ramp. Once off the highway there are three turns before reaching the complex. The only highway that extends near Port Charlotte is I-75, a major highway that extends from Northern Michigan through Naples, FL, and passes through the eastern Port Charlotte and Punta Gorda. This is the major highway in western Florida and connects all of the major population centers along the Gulf of Mexico.

For access from Central and Northeastern Florida, I-4 runs from Daytona Beach through Orlando before a junction with I-75 in Tampa. When driving from Florida's east coast, there is no major highway between Daytona Beach and Fort Lauderdale. U.S. 70 runs from Port St. Lucie to the Port Charlotte area but is a smaller road than the other interstates mentioned.

Although the vast majority of prospective teams will travel to the complex by car, traveling to Charlotte County from outside of Florida will, in most cases, require air travel. This will typically only occur in the following situations:

- National/International Tournaments
- Week-Long Tournaments
- Overnight Camps
- Spring Training (Weeklong)

Southwest Florida International Airport

The closest airport with major domestic flights is Southwest Florida International Airport in Fort Myers which is a little over an hour drive south of Port Charlotte. It has the most flights by far with nonstop service to most of the major cities in the country, but with limited service to the western United States.

Table 3.10: Direct Service to Southwest Florida International Airport

Destination	Airline	Destination	Airline
	AirTran Airways	Key West	Cape Air
Atlanta	Delta Air Lines	Long Island – Islip	Southwest Airlines
Atlantic City	Spirit Airlines	Memphis	Delta Air Lines
	AirTran Airways	Miami	American Eagle
Baltimore	Southwest Airlines		AirTran Airways
Bloomington-Normal, Ill	AirTran Airways	Milwaukee	Frontier Airlines
	JetBlue		Delta Air Lines
Boston	AirTran Airways	Minneapolis	Sun Country
	AirTran Airways	Montreal, Canada	Air Canada
Buffalo	JetBlue	Nashville	Southwest Airlines
Canton-Akron	AirTran Airways	New York	Delta Air Lines
Charlotte	US Airways	New York-JFK	JetBlue
	Southwest Airlines		Continental
Chicago-Midway	AirTran Airways	New York-Newark	JetBlue
	USA 3000 Airlines	New York-White Plains	JetBlue
Chicago-O'Hare	Spirit Airlines	Orlando-McCoy	Southwest Airlines
	American Airlines		US Airways
	United Airlines	Philadelphia	Southwest Airlines
	Delta Air Lines	Pittsburgh	AirTran Airways
Cincinnati	USA 3000 Airlines	Rochester	AirTran Airways
	Continental Airlines		USA 3000 Airlines
Cleveland	USA 3000 Airlines	St. Louis	Southwest Airlines
Columbus	AirTran Airways		Air Canada
Dallas- Fort Worth	American Airlines	Toronto, Canada	WestJet
Denver	Frontier Airlines	Washington, DC-	AirTran Airways
	Delta Air Lines	National	US Airways
Detroit- Metro	Spirit Airlines		
Flint	AirTran Airways		
Grand Rapids	AirTran Airways		
	Continental Airlines		
Houston-Intercontinental	AirTran Airways		
Indianapolis	AirTran Airways		
Kansas City	Frontier Airlines		

Sarasota-Bradenton Airport

The Sarasota-Bradenton International Airport also has commercial flights, although fewer with direct service, and is about an hour drive north of Port Charlotte. Cities with direct service to Sarasota are listed below in table 3.11.

Table 3.11: Direct Service to Sarasota-Bradenton International Airport

Destination	Airline	Seasons
Atlanta, GA (ATL)	Delta Airlines	Year Round
	AirTran Airlines	Year Round
Baltimore, MD (BWI)	AirTran Airlines	Year Round
Boston, MA (BOS)	JetBlue Airways	Year Round
	AirTran Airlines	Winter/Spring
Charlotte, NC (CLT)	U.S. Airways	Year Round
Chicago, IL (MDW)	AirTran Airlines	Year Round
Cincinnati, Ohio (CVG)	Delta Airlines	Winter/Spring
Detroit, MI (DTW)	Delta Airlines	Winter/Spring
Indianapolis, IN (IND)	AirTran Airlines	Winter/Spring
Milwaukee (MKE)	AirTran Airlines	Winter/Spring
New York, NY (JFK)	JetBlue Airways	Year Round
Toronto, Canada (YYZ)	Air Canada	Winter/Spring
Washington, DC (DCA)	U.S. Airways	Year Round

Tampa International Airport

The Tampa International Airport is about a two-hour drive to Port Charlotte, but offers additional flight options to prospective visitors. Table 3.12 below shows a list of all cities with non-stop service to Tampa International Airport. Southwest Airlines and AirTran Airways provide the most direct service although most major airways have a presence in Tampa.

Table 3.12: Direct Service to Tampa International Airport

City	Airline	City	Airline
Akron	AirTran Airlines	Kansas City	Southwest Airlines
Albany	Southwest Airlines	Los Angeles	Delta Airlines
Austin	Southwest Airlines	Manchester	Southwest Airlines
Atlanta	Delta Airlines	Memphis	Delta Airlines
	AirTran Airlines	Miami	American Airlines
Atlantic City	Spirit	Milwaukee	Southwest Airlines
Baltimore	Southwest Airlines		AirTran Airways
	AirTran Airlines	Minneapolis	Delta Airlines
Buffalo	Southwest Airlines	Nashville	Southwest Airlines
Charlotte	U.S. Airways	New Orleans	Southwest Airlines
Chicago-Midway	Southwest Airlines	New York- LaGuardia	Delta Airlines
Chicago- O'Hare	American Airlines	New York-JFK	Delta Airlines
	Continental Airlines		American Airlines
	Delta Airlines	New York-Newark	United Airlines
Cincinnati	Delta Airlines	Norfolk	Southwest Airlines
Columbus	Southwest Airlines	Philadelphia	Southwest Airlines
Dallas	American Airlines		U.S. Airways
Dayton	AirTran Airlines	Phoenix	Southwest Airlines
Denver	Southwest Airlines		U.S. Airways
Detroit	Delta Airlines	Pittsburgh	Southwest Airlines
Flint	AirTran Airlines		AirTran Airways
Ft. Lauderdale	Spirit	Providence	Southwest Airlines
Grand Rapids	AirTran Airlines	Raleigh/Durham	Southwest Airlines
Hartford	Southwest Airlines	Rochester	AirTran Airways
Houston-Hobby	Southwest Airlines	San Antonio	Southwest Airlines
	AirTran Airlines	St. Louis	Southwest Airlines
Indianapolis	Southwest Airlines	Washington-National	U.S. Airways
Jacksonville	Southwest Airlines		
Las Vegas	Southwest Airlines		
Long Island	Southwest Airlines		
Louisville	Southwest Airlines		

Accommodations

Charlotte County features several lodging options with a mix of hotels, motels, Bed & Breakfasts, and Beach Resorts. There are alternatives for all types of families and groups depending on their personal preferences.

Table 3.13: Charlotte County Accommodations

Name	Address	Units	Distance (miles)	Pool
Days Inn	1941 Tamiami Trail, Port Charlotte, FL 33948	126	4	Yes
Microtel Inn & Suites	4056 Tamiami Trail, Port Charlotte, FL 33952	86	7.4	Yes
Knights Inn	4100 Tamiami Trail, Port Charlotte, FL 33952	60	7.5	No
Charlotte Bay Resort & Club	23128 Bayshore Rd, Charlotte Harbor, FL 33980	12	8.9	Yes
Banana Bay Waterfront Motel	23285 Bayshore Rd, Port Charlotte, FL 33980	13	9.3	Yes
Harbor Pointe Resort	5121 Melbourne St, Port Charlotte, FL 33980	96	9.4	Yes
Country Inn & Suites	24244 Corporate Ct, Port Charlotte, FL 33954	93	9.5	Yes
Sleep Inn & Suites	806 Kings Hwy, Port Charlotte, FL 33980	78	10.1	Yes
La Quinta Inn & Suites	812 Kings Hwy, Port Charlotte, FL 33980	81	10.2	Yes
Holiday Inn Express	24440 Sandhill Blvd, Port Charlotte, FL 33983	69	10.3	Yes
Hampton Inn	24480 Sandhill Blvd, Port Charlotte, FL 33983	73	10.4	Yes
Wyvern Hotel	101 E Retta Esplanade, Punta Gorda, FL 33950	63	10.5	Yes
Best Western Waterfront	300 Retta Esplanade, Punta Gorda, FL 33950	187	10.8	Yes
Fisherman's Village Resort	1200 W Retta Esplanade, Punta Gorda, FL 33950	47	11.4	Yes
Budget Inn	1520 Tamiami Trail, Punta Gorda, FL 33950	48	11.5	Yes
Four Points by Sheraton Punta Gorda Harborside	33 Tamiami Trail, Punta Gorda, FL 33950	106	11.5	Yes
Place in the Sun Vacation Rental	2670 S McCall Rd, Ste 12, Englewood, FL 34224	75	11.7	Yes
Veranda Inn of Englewood	2073 S McCall Rd, Englewood, FL 34224	38	12.5	Yes
Flamingo Motel & Apartments	12420 Tamiami Trail, Punta Gorda, FL 33955	19	12.8	Yes
Lemon Bay Motel	1630 S McCall Rd, Englewood, FL 34223	12	13.1	No
Palm Manor Resort	1531 Placida Rd, Englewood, FL 34223	30	13.1	Yes
Palm Island Resort	7092 Placida Rd, Cape Haze, FL 33946	80	14.3	Yes
Grove City Motel	2555 Placida Rd, Englewood, FL 34224	9	14.5	Yes
American Inn	10151 Tamiami Trail, Punta Gorda, FL 33950	12	14.6	No
Angler's Resort on Manasota Key	1927 Beach Rd, Englewood, FL 34223	15	15	Yes
Conch Out Vacations at Manasota Key Realty	1927 Beach Rd, Englewood, FL 34223	200	15	Yes
Motel 6	9300 Knights Drive, Punta Gorda, FL 33950	73	15.3	Yes
Days Inn	9035 Mac Dr, Punta Gorda, FL 33950	74	15.4	Yes
Englewood Beach & Yacht Club	1815 Gulf Blvd, Englewood, FL 34223	21	15.4	Yes
Sea Oats Beach Club	1720 Gulf Blvd, Englewood, FL 34223	25	15.4	Yes
The Boardwalk	2400 N Beach Rd, Englewood, FL 34223	16	15.6	Yes
Weston's Resort	985 Gulf Blvd, Englewood, FL 34223	83	16.1	Yes
	Total	2020		

Tourism

Although Charlotte County is not as large as other tourist destinations in Florida, it offers a variety of attractions. As with any Florida destination, beaches are a key component and Port Charlotte offers excellent public and private beaches. In addition, Charlotte County has extensive outdoor recreation offerings including kayaking, canoeing, fishing, sailing, and scuba diving. There are 28 miles of beaches and almost 200 miles of Charlotte Harbor Blueway Trails for kayaking and canoeing. In addition to the beaches, Kids Star Amusement Park and the Regal 16 movie theater provide entertainment for families. Port Charlotte also offers two bowling alleys, Bowland and Treasure Lanes, and the Fish Cove Adventure Miniature Golf for low-key evening and group activities.

Charlotte County offers a variety of shopping and restaurant options. The two main centers for shopping are the Port Charlotte Town Center and Fisherman's Village. Fisherman's Village is a waterfront mall, resort, and marina that offer an excellent selection of boutique shops and great restaurants on Charlotte Harbor. Historic Punta Gorda is also a great spot for local shops, known for its fine jewelry selection and Swiss Chocolate. On a larger scale, Port Charlotte Town Center is a traditional shopping mall made up primarily of national chain stores, big box stores, restaurants and a food court. Finally, Charlotte Harbor is known for its artists and many galleries can be found throughout the Charlotte Harbor area.

Baseball, fishing, and golf are the biggest sports attractions in Charlotte County. The Tampa Bay Rays and the Charlotte Stone Crabs play their home games at the Charlotte Sports Park. The Stone Crabs, a high-A minor league affiliate of the Rays, play a full schedule from May-early September. In addition to professional baseball, the Snowbird Baseball Classic is held at venues throughout the county and features top Division I and Division III NCAA baseball teams as they begin their seasons. Having drawn teams such as Ohio State, Michigan, and Notre Dame among others, the Tourism Department estimated the economic impact of the 2011 Snowbird Classic to be \$3.9 Million.

Charlotte County was voted the #3 Best Place in America to Live and Play Golf by Golf Digest and offers plenty of options. Two of the best public courses are Deep Creek Golf Club and Riverwood Golf and Country Club. On Saturday nights in the summer the Charlotte County Speedway has a full schedule of races. The 3/8-mile track in Punta Gorda features stock car racing, spring cars, and kart races.

Finally, Charlotte County is best known for its fishing. With rivers, Charlotte Harbor, and the Gulf of Mexico, the area offers a multitude of fishing options. The area was named #1 on the list of the World's 14 Top Tarpon Sports by Sport Fishing Magazine. Additionally, Port Charlotte is home to the Redfish Cup Tournament and Festival. Tarpon is a large game fish and the confluence of fresh water rivers and the salt water of the Gulf makes Port Charlotte a unique fishing location.

Proposed/Additional Developments

The existing tourist-centric infrastructure and visitor amenities in and around Port Charlotte, while strong in certain areas, lack the volume, variety and proximity to the park location, to support a “destination” sports facility in the market. Florida is an extremely competitive market for tourism as the majority of locations are able to offer the same two consistent attractions: sun and surf. Some offer amusements unlike any other in the world, such as Disney World, Universal Studios, Sea World and Legoland. In these areas Port Charlotte does not, and should not attempt to, compete.

However, the construction of more modestly sized, affordable, family-friendly attractions, located on-site or in extremely close proximity to the proposed complex will create enough of a unique destination to attract teams from throughout the region. The Murdock Village development would fill this role, as it would provide, as proposed, on-site accommodations that are unique and experiential in nature, as well as signature attractions like a water park, miniature golf, Movie Theater etc. The ability for teams to participate in a tournament and enjoy local amenities between games or in the evenings without having to commit to a long drive, is essential to the success of a complex in Murdock Village. Combined with adjacency to the Tampa Bay Rays and Charlotte Stone Crabs, a full family-friendly sports tourist destination—capable of attracting and entertaining tournament participants, their parents and their siblings—can be cultivated in Port Charlotte.

Drive Time Analysis

The proposed facility in Charlotte County will primarily draw from two markets: the local market, which will participate in training, camp, league and tournament programming, and the regional market that will use the facility for high-end tournaments and provide economic impact to the area. Three regions, corresponding with a 1-hour, 2-hour, and 4-hour drive time from the proposed facility, roughly correlate with the volume of teams that will visit the complex from each area, and the type of programming that will attract teams from each area.

The local market consists of people located within a 1-hour drive of the facility, with the highest levels of participation coming from those closest to the facility. Leagues, practices, weekend tournaments, and camps will be the major draw for these teams. The primary regional market consists of teams traveling between 1-2 hours of the facility, and will mostly consist of tournament teams—especially for more prestigious or longer tournaments, as well as some overnight camp participants, if that programming option is offered. Teams from a 2-4 hour drive will be attracted for typical weekend tournaments, as well as holiday and weeklong events. The vast majority of these teams will stay overnight in the facility to avoid long drives each day.

The Drive Time Ring Analysis compares the Charlotte County market against comparable facilities broken in three subsets: Tournament Complexes, Destination Complexes, and Spring Training Complexes. One of the biggest differences in the subsets is the market from which they draw. Table 3.14 shows the number of registrations by distance and the percentage of total registrations from each distance for the Ripken Experience-Myrtle Beach and the Ripken Experience- Maryland.

Table 3.14: Ripken Experience-Myrtle Beach and Ripken Experience- Maryland Registrations by Distance

Total Registrations								
Ripken Experience-Myrtle Beach								
Year	100 Mile	200 Mile	300 Mile	400 Mile	500 Mile	600 Mile	700 Mile	Total
2006	10	6	2	3	0	0	0	22
2007	20	11	14	32	29	63	15	225
2008	18	44	21	37	60	63	20	323
2009	22	22	56	40	45	78	28	360
2010	15	63	36	51	61	83	22	411
2011	10	59	39	80	73	93	32	492
Ripken Experience-Maryland								
Year	100 Mile	200 Mile	300 Mile	400 Mile	500 Mile	600 Mile	700 Mile	Total
2006	306	122	51	8	1			495
2007	329	145	42	6	0			541
2008	378	169	31	3	1			588
2009	461	207	43	1	0			730
2010	554	216	42	7	0			830
2011	635	252	52	11	2			980
% of Total								
Ripken Experience-Myrtle Beach								
Year	100 Mile	200 Mile	300 Mile	400 Mile	500 Mile	600 Mile	700 Mile	Total
2006	45.45%	27.27%	9.09%	13.64%	0.00%	0.00%	0.00%	22
2007	8.89%	4.89%	6.22%	14.22%	12.89%	28.00%	6.67%	225
2008	5.57%	13.62%	6.50%	11.46%	18.58%	19.50%	6.19%	323
2009	6.11%	6.11%	15.56%	11.11%	12.50%	21.67%	7.78%	360
2010	3.65%	15.33%	8.76%	12.41%	14.84%	20.19%	5.35%	411
2011	2.03%	11.99%	7.93%	16.26%	14.84%	18.90%	6.50%	492
Ripken Experience-								

Maryland								
Year	100 Mile	200 Mile	300 Mile	400 Mile	500 Mile	600 Mile	700 Mile	Total
2006	61.82%	24.65%	10.30%	1.62%	0.20%	0.00%	0.00%	495
2007	60.81%	26.80%	7.76%	1.11%	0.00%	0.00%	0.00%	541
2008	64.29%	28.74%	5.27%	0.51%	0.17%	0.00%	0.00%	588
2009	63.15%	28.36%	5.89%	0.14%	0.00%	0.00%	0.00%	730
2010	66.75%	26.02%	5.06%	0.84%	0.00%	0.00%	0.00%	830
2011	64.80%	25.71%	5.31%	1.12%	0.20%	0.00%	0.00%	980

This data highlights the role that traveling distances plays depending on the type of complex and markets targeted. Ripken Experience-Maryland draws 90.51% of its visitors from within 200 miles. Conversely, the majority of Ripken Experience-Myrtle Beach visitors travel between 400-600 miles. Furthermore, the strongest market for the Aberdeen, MD location is the local area within 100 miles (64.80% in 2011). The Myrtle Beach facility visitors, on the other hand, are not heavily concentrated in one particular range and the local area within 100 miles is the weakest market (2.03% in 2011).

Differences between the drawing radii of the facilities is reflective of the different programming models utilized at a destination complex and a more traditional weekend tournament facility. It also reemphasizes the importance of regional demographic strength for a destination facility relative to local demographic strength. While Port Charlotte is an admittedly weak market on the latter, it performs comparably on all key measures in the former, as the following drive time analysis will show.

0-1 Hour Drive Time

Although the local area is not the primary target for a new complex, potential facility users from this area will be most likely to use the complex for practices, league games, and recreational events. While local residents may use the complex frequently, they will provide relatively low economic impact. Nonetheless, as they will use the complex most frequently for low-intensity activities, the economic and demographic strength of the local area is still important. The following table shows 1-hour drive time information, for Charlotte County and comparable facilities.

Table 3.15: 1-Hour Drive Time From Complex location

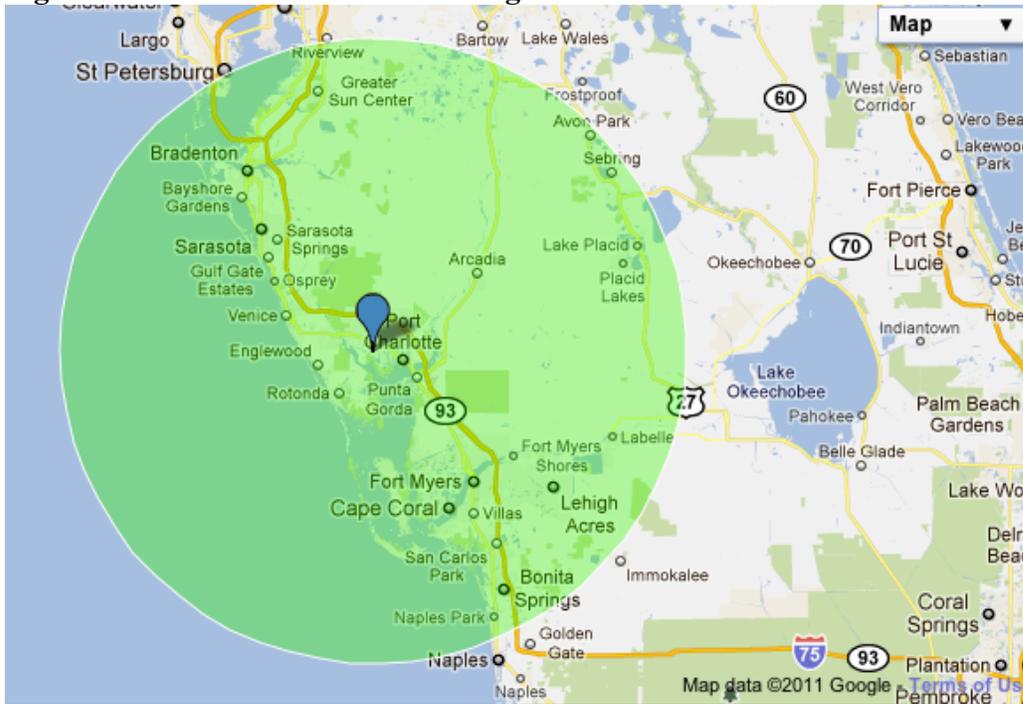
1-Hour Drive Time From Complex Location						
Name	Location	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.	Families > \$50,000
Tournament Complexes						
Ripken Experience-Maryland	Aberdeen, MD	8,608,596	23.62%	\$73,295.00	\$90,467.00	1,680,446
Cypress Mounds	Baton Rouge, LA	1,784,007	25.18%	\$50,222.00	\$65,085.00	281,246
Old Settlers Park	Round Rock, TX	2,252,693	25.70%	\$63,321.00	\$77,859.00	385,877
East Cobb Baseball Complex	Marietta, GA	5,871,766	26.49%	\$63,518.00	\$75,480.00	1,015,029
Charlotte County	Port Charlotte, FL	1,642,392	18.46%	\$55,259.00	\$67,692.00	301,835
Destination Complexes						
Name	Location	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.	Families > \$50,000
Ripken Experience- Myrtle Beach	Myrtle Beach, SC	731,410	21.80%	\$47,417.00	\$59,923.00	112,891
ESPN Wide World of Sports	Kissimmee, FL	5,762,327	22.31%	\$54,854.00	\$66,469.00	959,189
Cooperstown Dreams Park	Milford, NY	1,180,206	21.22%	\$59,579.00	\$76,741.00	202,670
Cocoa Expo	Cocoa, FL	3,013,356	22.06%	\$56,193.00	\$68,332.00	505,669
Charlotte County	Port Charlotte, FL	1,642,392	18.46%	\$55,259.00	\$67,692.00	301,835
Spring Training Complexes						
Name	Location	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.	Families > \$50,000
Lee County Sports Complex	Fort Myers, FL	1,566,586	18.34%	\$58,465.00	\$70,681.00	297,142
Roger Dean Sports Complex	Jupiter, FL	3,670,331	21.35%	\$59,157.00	\$72,592.00	205,910
Surprise Baseball Complex	Surprise, AZ	4,192,887	26.42%	\$63,151.00	\$74,957.00	715,223
Peoria Sports Complex	Peoria, AZ	4,192,887	26.42%	\$63,151.00	\$74,957.00	715,223
Salt River Fields	Scottsdale, AZ	4,246,484	26.35%	\$62,791.00	\$74,588.00	722,377
Charlotte County	Port Charlotte, FL	1,642,392	18.46%	\$55,259.00	\$67,692.00	301,835

The local market within one hour of Port Charlotte compares very well with the markets of other successful tournament facilities. When considering that the Ripken Experience-Maryland and East Cobb Baseball Complex are located near major cities, Baltimore/Philadelphia and Atlanta, respectively, Charlotte County's local market measures up relatively well with Old Settlers Park and Cypress Mounds. Charlotte County is also competitive economically in this subset. As is the case in most comparisons, Charlotte County's percentage of the population under the age of 18 is lower than other markets.

Charlotte County's local market also performs very well against comparable destination complexes. With the exception of percentage of population under the age of 18, Charlotte County is third in every category. It ranks ahead of Cooperstown Dreams Park and the Ripken Experience-Myrtle Beach in every category.

The market within one hour of Charlotte County also stacks up well against comparable Spring Training Complexes. It is important to note that the three Arizona complexes selected share the same local market, the Phoenix MSA. Compared to the Lee County Sports Complex and the Roger Dean Sports Complex, Charlotte County is very similar in demographic and economic categories.

Figure 3.1: 0-1 Hour Drive Time Ring



1-2 Hour Drive Time

The 1-2 hour drive time is the most important range when assessing the potential success for a new complex in the area. While the immediate local region draws from a strong population base, when the range is expanded two of the biggest markets in the state are within driving distance. The Tampa-St. Petersburg metropolitan area is squarely in the 1-2 hour driving range and represents a huge population and industry center. Additionally, Orlando is on the outer edge of this range, another large metropolitan area.

In assessing the 1-2 hour range, income statistics become more of a consideration. These teams will typically not participate in non-tournament activities at the proposed facility. Instead, their participation will be almost entirely tournament focused and will require that they have the income necessary to cover the costs associated with tournament play, above and beyond the tournament fees themselves. The following table assesses the 1-2 hour demographic ring for Charlotte County and comparable facilities:

Table 3.16: 1-2 Hour Drive Time from Complex Location

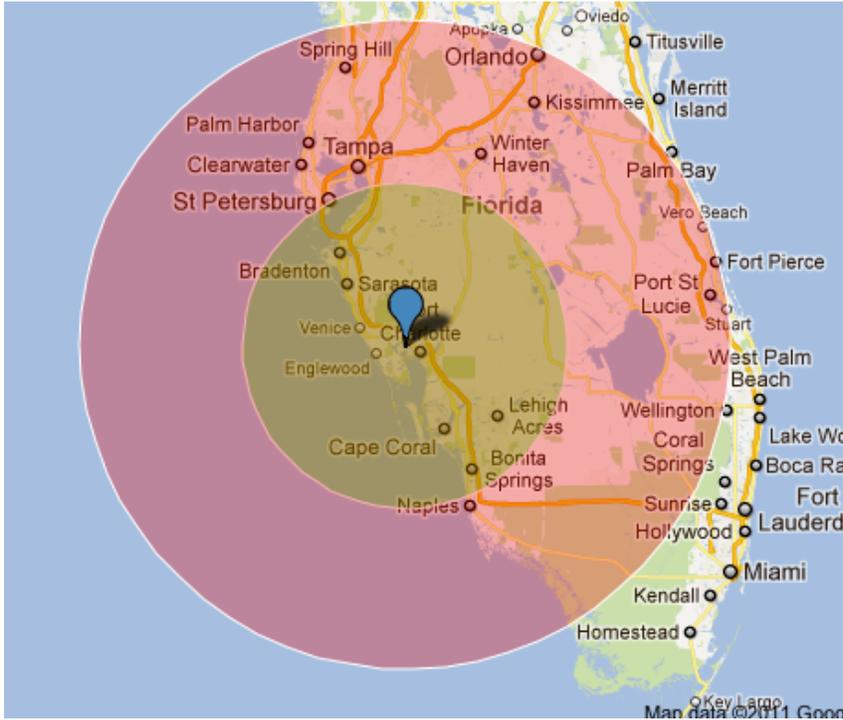
1-2 Hour Drive Time from Complex Location						
Name	Location	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.	Families > \$50,000
Tournament Complexes						
Ripken Experience-Maryland	Aberdeen, MD	14,498,311	23.07%	\$72,240.00	\$90,240.00	2,747,724
Cypress Mounds	Baton Rouge, LA	2,165,434	24.14%	\$49,394.00	\$62,726.00	326,095
Old Settlers Park	Round Rock, TX	3,336,638	25.65%	\$52,929.00	\$66,851.00	519,222
East Cobb Baseball Complex	Marietta, GA	4,027,202	23.06%	\$46,202.00	\$59,517.00	623,828
Charlotte County	Port Charlotte, FL	6,072,706	21.95%	\$55,003.00	\$67,392.00	1,003,337
Destination Complexes						
Ripken Experience- Myrtle Beach	Myrtle Beach, SC	3,024,239	24.14%	\$48,472.00	\$60,535.00	453,042
Cooperstown Dreams Park	Milford, NY	5,941,005	22.56%	\$58,788.00	\$74,457.00	1,081,651
ESPN Wide World of Sports	Kissimmee, FL	4,542,452	19.23%	\$52,599.00	\$66,118.00	793,736
Cocoa Expo	Cocoa, FL	5,608,782	21.01%	\$52,111.00	\$64,899.00	939,692
Charlotte County	Port Charlotte, FL	6,072,706	21.95%	\$55,003.00	\$67,392.00	1,003,337
Spring Training Complexes						
Lee County Sports Complex	Fort Myers, FL	9,632,664	21.70%	\$54,556.00	\$67,043.00	1,532,911
Roger Dean Sports Complex	Jupiter, FL	4,622,151	21.14%	\$52,837.00	\$63,735.00	183,552
Surprise Baseball Complex	Surprise, AZ	285,119	19.44%	\$46,712.00	\$59,030.00	45,380
Peoria Sports Complex	Peoria, AZ	1,265,382	22.19%	\$50,366.00	\$64,850.00	200,393
Salt River Fields	Scottsdale, AZ	1,191,296	22.29%	\$51,533.00	\$66,076.00	190,970
Charlotte County	Port Charlotte, FL	6,072,706	21.95%	\$55,003.00	\$67,392.00	1,003,337

Charlotte County performs very well against comparable tournament facilities in the 1-2 Hour ring. The area ranks 2nd in population, median household income, median family income, and total families with an income over \$50,000. Charlotte County is only behind the Ripken Experience-Maryland in each of these categories.

Charlotte County compares very well with destination complexes in the 1-2 hour ring as well. Charlotte County ranks first or second in each of the financial statistics. Perhaps most important in this subset is the fact that Charlotte County outperforms the two other Florida complexes, ESPN Wide World of Sports and Cocoa Expo, in this market.

When comparing Spring Training Complexes in the 1-2 Hour ring, Charlotte County continues to perform well. It has the highest median household and family incomes and the third highest percentage of the population under the age of 18. It will be critical to draw from this ring for a new complex in the area to be successful.

Figure 3.2: 1-2 Hour Drive Time Ring



2-4 Hour Drive Time

While the proposed complex will draw most heavily from the 1-2 Hour Ring, the 2-4 hour ring is accountable for most of the rest. When extending the ring out to this range, most of the major cities in the state are included with the exception of the Florida panhandle. The most important market in this range is the Miami metropolitan area. For teams coming from the north, there is a glut of complexes before Charlotte County, likely decreasing their likelihood to drive further south. However, the Miami market is devoid of a first-class facility in its local market despite being the largest MSA in the state.

Teams from this drive time radius almost always stay overnight, and need to be able to absorb the costs that come from travel and an overnight stay. Given the distance required to attend an event, it is believed that attendees from this ring bring with them the largest average travelling party.

Figure 3.3: 2-4 Hour Drive Time Ring

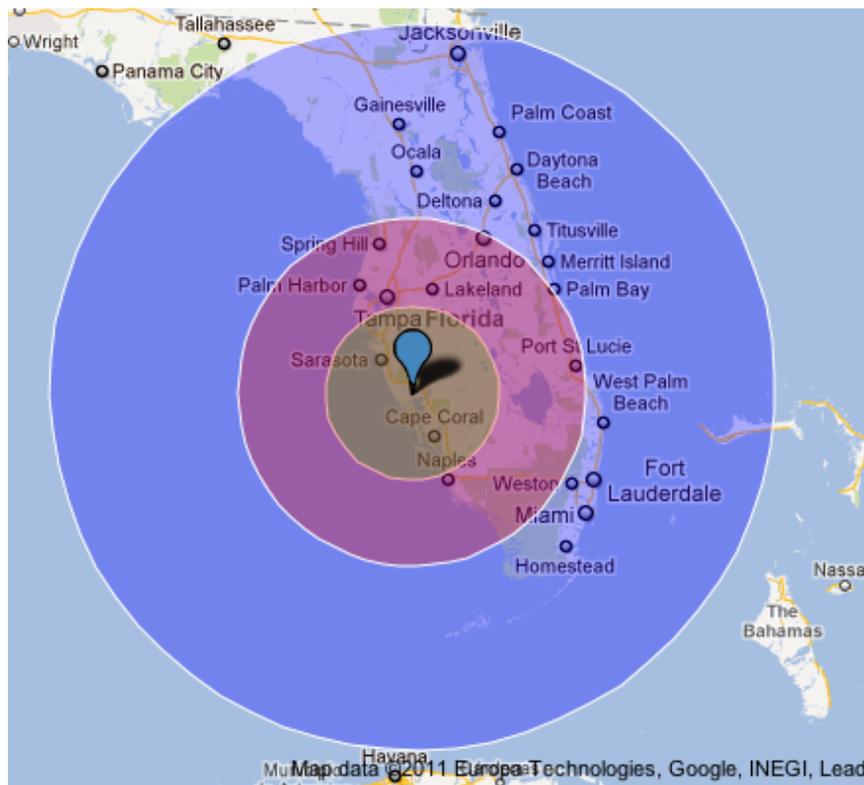


Table 3.17: 2-4 Hour Drive Time from Complex Location

2-4 Hour Drive Time From Complex Location						
Name	Location	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.	Families > \$50,000
Tournament Complexes						
Ripken Experience-Maryland	Aberdeen, MD	31,539,712	23.10%	\$63,196.00	\$78,351.00	5,463,179
Cypress Mounds	Baton Rouge, LA	5,295,044	24.82%	\$46,673.00	\$59,418.00	781,318
Old Settlers Park	Round Rock, TX	16,063,315	27.28%	\$59,660.00	\$71,161.00	2,609,438
East Cobb Baseball Complex	Marietta, GA	16,866,449	23.66%	\$48,536.00	\$62,210.00	2,661,083
Charlotte County	Port Charlotte, FL	9,627,582	21.32%	\$54,934.00	\$67,745.00	1,562,295
Destination Complexes						
Ripken Experience- Myrtle Beach	Myrtle Beach, SC	12,195,251	23.80%	\$52,604.00	\$66,654.00	905,563
Cooperstown Dreams Park	Milford, NY	46,810,762	22.47%	\$68,166.00	\$85,551.00	8,468,807
ESPN Wide World of Sports	Kissimmee, FL	8,283,738	22.05%	\$55,984.00	\$68,656.00	1,297,879
Cocoa Expo	Cocoa, FL	9,326,022	21.49%	\$55,498.00	\$68,075.00	1,511,300
Charlotte County	Port Charlotte, FL	9,627,582	21.32%	\$54,934.00	\$67,745.00	1,562,295
Spring Training Complexes						
Lee County Sports Complex	Fort Myers, FL	5,096,731	20.94%	\$54,029.00	\$66,825.00	868,092
Roger Dean Sports Complex	Jupiter, FL	7,954,603	21.05%	\$53,978.00	\$67,219.00	364,893
Surprise Baseball Complex	Surprise, AZ	4,085,066	24.87%	\$55,774.00	\$66,681.00	638,326
Peoria Sports Complex	Peoria, AZ	3,176,295	25.59%	\$56,456.00	\$66,123.00	489,508
Salt River Fields	Scottsdale, AZ	1,245,515	26.33%	\$44,573.00	\$53,070.00	162,514
Charlotte County	Port Charlotte, FL	9,627,582	21.32%	\$54,934.00	\$67,745.00	1,562,295

The 2-4 hour ring is Charlotte County's weakest compared to other successful complexes, but is still very competitive in each category. Amongst tournament complexes, Charlotte County does not rank better than third in any category, however it is only last in the percentage of the population under the age of 18.

Charlotte County is competitive with Destination Complexes in the 2-4 hour ring but does not perform as well as the 1-2 hour ring. Charlotte County's strength in this subset is in the number of families with an income over \$50,000. As noted in the Participation Trends section, a high number of frequent baseball players come from families with an income above \$50,000.

Charlotte County performs very well in the 2-4 hour ring when compared to other Spring Training complexes. The area ranks first in three of the five categories and no worse than third in any measure. The socioeconomic strength of the market is very important as Charlotte County ranks first in median family income and the number of families with an income over \$50,000.

IV. COMPETITIVE ANALYSIS

Introduction

Charlotte County and the surrounding area feature a wide array of baseball and softball complexes, parks, and Spring Training complexes. Through an analysis of tournament schedules in Florida, Ripken Design has been able to identify the complexes that would pose the largest competitive threat to a sports complex in Charlotte County.

Ripken Design has defined “local” competition as those facilities within a 2-hour drive, “sub-regional” as the facilities between 2 and 4 hours and “regional” as the facilities within 4 to 6 hours. Six hours is typically considered the maximum driving distance for a tournament, and teams will drive travel this distance for tournaments, especially premier weekend, holiday, and week-long tournaments, but at a much lower rate than locally based teams. Complexes were selected based on size, amenities, field quality, and current tournament/competition operations. A summary of the facilities examined can be found in Table 4.1 on the following page.

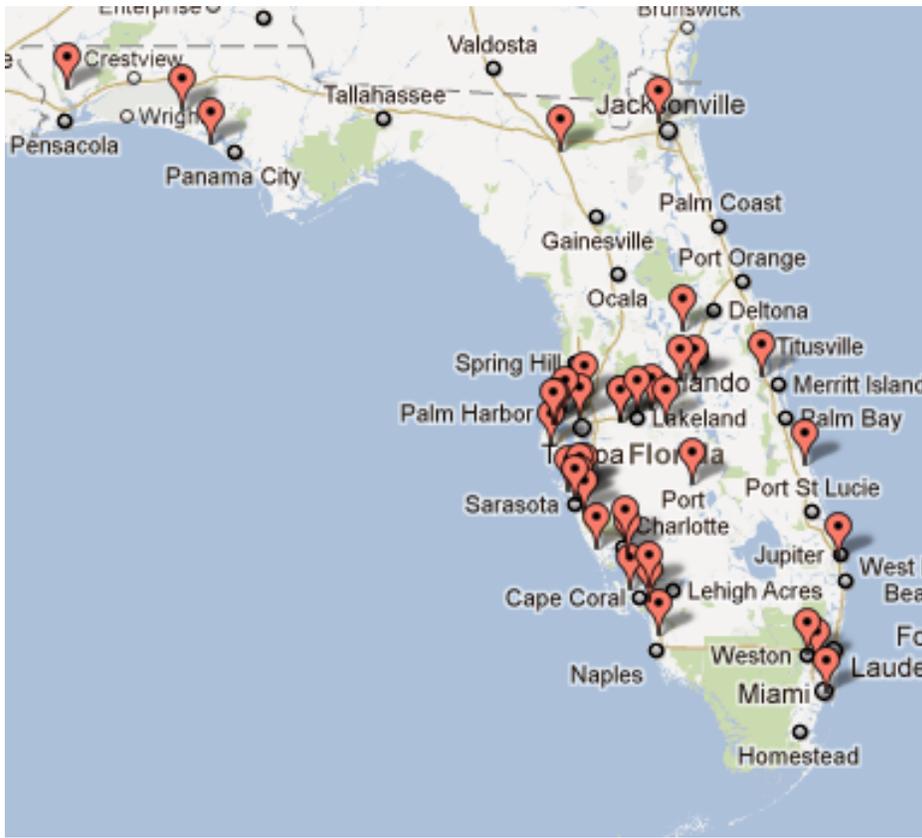
The purpose of this section is to determine the competitive threat posed by local and regional sports complex markets that exist around Port Charlotte. This will provide a better understanding of the necessary size, scope, amenities, and price points which will be essential to any new complex’s success. The section is broken down by region, beginning with complexes closest to Charlotte County.

Table 4.1: Summary Table of Competitive Complexes

Venue	Grass Infields	Skinned Infields	Venue	Grass Infields	Skinned Infields
Local Competition			Regional 2+ Hours		
Harold Avenue Complex	4	3	Cocoa Expo Sports Center	10	2
South Charlotte Regional Park	4	6	Vero Beach Sports Complex	7	
Englewood Sports Complex	6	3	Roger Dean Complex	12	
Cape Coral Sports Complex	4	5	Pembroke Shores Park	3	5
G.T. Bray Sports Complex	4	4	Weston Regional Park	5	3
Terry Park	4		Grapeland Heights Park		4
Lee County Sports Complex	5	4	Northwest Recreation Complex	6	6
City of Sarasota Sports Complex	11	2	The World of Baseball	4	
Twin Lakes Park	9		Southside Recreation Complex	13	12
Miss Sarasota Softball Complex		10	Freeport Regional Sports Complex	5	
Braden River Park	7		Frank Brown Park	2	9
Lakewood Ranch Sports Complex	6	6	Santa Rosa Sports Plex	8	8

Regional 1-2 hours			Georgia		
North Collier Regional Park		5	North Glynn Recreation Complex	4	4
Chain of Lakes Park	7		Mill Creek Regional Park	8	4
Carpenter Baseball Complex	7		South Commons Regional Sports Complex		8
Lake Parker Park	7		George Harris Sports Complex	8	6
Eddie Moore Complex		7	South Walton Park	3	3
Lake Myrtle Sports Park	5		East Cobb Baseball Complex	4	4
Ed Radice Sports Complex	4	7	Southern Pines Regional Park	6	9
Raymond Naimoli Baseball Complex	9	1			
Mike Sansone Community Park	5	2			
Highlands County Sports Complex		5			
Larson Fourplex		5			
Land'O Lakes Recreation Complex	8	2			
ESPN Wide World of Sports Complex	9	6			
Osceola County Softball		5			

Chart 4.1: Map of Florida Baseball and Softball Complexes



Local Competition

The local market consists of facilities that could compete with the proposed complex, primarily in the tournament market. Facilities that have a history of hosting youth tournaments are given the most attention. In many cases, the local market consists of public parks that, while competitive, should also be viewed as potential complementary fields to the proposed baseball complex. Ideally, a new facility should optimize usage and programming among all publicly owned facilities in the area, instead of competing head to head. The following includes profiles of local facilities that will compete with the proposed sports complex if all local venues are viewed as potential competitors.

Harold Avenue Park: 23400 Harold Ave, Port Charlotte, FL

Harold Avenue Park in Port Charlotte, FL is a public baseball and softball facility designed primarily for youth sports. The complex consists of seven (7) baseball fields, three (3) of which with skinned dirt infields and four (4) with traditional grass infields. Six (6) of the fields are youth diamonds with 200' fences and the remaining field is larger adult field. All of the fields are natural grass and equipped with lights.



A small wooded area and a parking lot separate the two types of fields. In addition to the fields there are tennis courts and outdoor basketball courts at the complex.

The Harold Avenue Complex is a small complex compared to many of the other facilities listed here and is not known for hosting significant youth tournaments. However, it is the home facility for Port Charlotte Little League games and practices.

Charlotte Sports Park: 2300 El Jobean Road, Port Charlotte, FL

The Charlotte Sports Park in Port Charlotte, FL is the Spring Training home of the Tampa Bay Rays and the Regular Season home of the Charlotte Stone Crabs. The facility consists of six (6) full size baseball fields and a practice infield. All of the fields are natural grass although only the main stadium field is equipped with lights.



The layout of the complex features four diamonds in a “pinwheel” quadruplex, one field outside of the quad, and the main stadium. In addition to the fields, the complex offers batting cages, bullpens, meeting rooms, covered pavilion, and parking.

When not hosting professional baseball, the complex is also used for tournaments and events. The Charlotte Sports Park is listed as a USSSA tournament location and hosts a variety of events including concerts, community events, and youth tournaments. Additionally, the complex hosted the Snowbird Baseball Classic, a spring event featuring NCAA baseball teams. Use of the fields at Charlotte Sports Park is anticipated in the programming model for the new facility for all older age group tournaments.

South Charlotte Regional Park: 670 Cooper Street, Punta Gorda, FL

South County Regional Park and Carmalita Park are 90 and 33 acres, respectively, and combined offer ten (10) baseball fields, six (6) with skinned infields and four (4) with grass infields, located just south of Port Charlotte, FL. All but one of the baseball fields are youth-size diamonds. All of the fields are natural grass and equipped with lights. Along with the diamonds, there are six (6) lighted soccer fields connected by a central path running throughout the complex.

In addition to the diamonds and athletic fields, there is a playground, several small ponds, tennis/racquetball courts, basketball courts, sand and paved volleyball courts, a remote control car track and airplane field, and a snack bar.



The complex is listed as a tournament location by USSSA although there are no

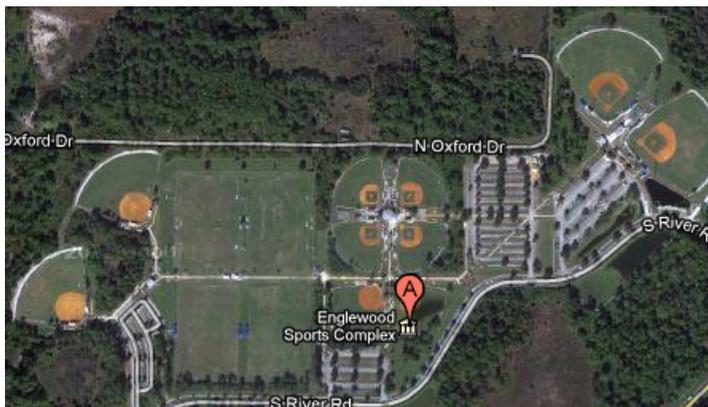
scheduled events for the complex in 2011. The complex is listed as a venue, along with other Port Charlotte locations, for the Snowbird Baseball Classic.



The South County Regional Park features high quality fields, but does not host a minimal number of youth tournaments. The proximity to a new complex in the area could make it a potential satellite or “overflow” location for larger tournament events.

Englewood Sports Complex: 1300 S. River Road, Englewood, FL

Englewood Sports Complex is a 136-acre facility in Englewood, FL. The multi-sport complex consists of ten (10) baseball fields, seven (7) with grass infields and three (3) with skinned infields, and four (4) soccer fields. Of these fields, four (4) of the baseball diamonds are adult-sized and six (6) are youth-sized fields. In addition to the ball fields, the complex offers tennis courts, an outdoor basketball court, two playgrounds, and an indoor gymnasium.



The complex is broken up into three distinct phases. The first features two adult baseball fields. These are the first fields seen upon entering the complex. The second phase consists of a “pinwheel” quad of youth baseball fields and two separate fields. Finally, the third phase includes the four soccer fields

and two skinned baseball/softball fields.

The Englewood Sports Complex hosts a number of visitors and events each year including youth baseball tournaments. Tournaments such as the Florida Curve All-Star Classic and the Nations Winter Slam are hosted at the complex through Nations Baseball. The entrance fees for teams entering these tournaments range from \$200 to \$250.

The Englewood Sports Complex is a very good complex located relatively close to the proposed complex in Port Charlotte. The complex is sure to be a competitor to a new complex in the area. It has hosted a number of tournaments in recent years although not an overwhelming amount.

Fort Myers/Cape Coral Area

Terry Park: 3410 Palm Beach Blvd, Fort Myers, FL

Terry Park in Fort Myers, FL is the former spring training home for several Major League teams, but has not had an MLB tenant since 1987. During this time the facility has been used primarily for youth baseball leagues and tournaments. The facility has four (4) full-sized, natural grass fields, all of which are fully lighted.



Despite not being used for Major League Spring Training anymore, the fields are still in very good shape and appear to be very carefully maintained. The fields are not formatted in a quad pinwheel layout and the park is located just a short distance from the Gulf of Mexico.

Terry Park hosts a variety of tournaments such as the AAU Baseball Underclassmen National Championships, and the Showball Baseball Showcase. USSSA and Perfect Game frequently use the complex. In addition to tournaments, Terry Park hosts several youth recruiting showcases.

Despite having only four fields, Terry Park is an excellent venue for competitive baseball. It is not capable of holding major tournaments by itself because of its size, but the quality of the facility makes it very competitive. It is a preferred destination for Perfect Game although the use of satellite locations is required in most cases.

Cape Coral Sports Complex: 1510 Sports Blvd, Cape Coral, FL

The Cape Coral Sports Complex is a 52-acre park in Cape Coral, FL and is a multi-sport facility. The park consists of nine (9) baseball fields, five (5) with skinned infields and four (4) with traditional grass infields, and five (5) soccer fields. In addition to the ball fields, the complex offers picnic shelters and tables, a playground, and three concession stands.

The complex layout is fairly standard without any notable unique features. The park consists of two pinwheel quads, one featuring grass infield diamonds and the other with skinned infield diamonds. The soccer fields are located in the back of the complex. All of the fields appear to be in relatively good condition, offer little that sets Cape Coral apart from other local complexes.



Cape Coral Sports Complex is the host of the Cape Coral Youth Soccer Association and Little League Junior Senior Baseball in addition to hosting youth tournaments. The facility is listed as a USSSA tournament location and is scheduled to host the X-MAS Grand Slam 3 day tournament in December of 2011. The entrance fee for this tournament is \$290.

Lee County Sports Complex: 14100 Ben C. Pratt/Six Mile Cypress Parkway Fort Myers, FL

The Lee County Sports Complex in Fort Myers, FL is a large baseball and softball complex and the home of the Minnesota

Twins Spring Training and the Fort Myers Miracle Minor League team. The complex consists of nine (9) full size baseball fields, five (5) Major League quality fields and four (4) full size diamonds with skinned dirt infields. There are also two (2) practice infields. The complex is located adjacent to South Fort Myers High School.



The centerpiece of the complex is Hammond Stadium and is the first field seen when entering from 6 Mile Cypress

Parkway. Behind the stadium are the baseball fields and practice infields. Across the parking lot is a pinwheel quad of fields. All of the fields are natural grass and are in excellent condition. Hammond Stadium and the four softball fields are equipped with lights.

When the Twins and Miracle are not using the complex, the facilities are available for youth baseball tournaments. The most frequent user of the complex is Perfect Game, which holds a numerous tournaments in the Fort Myers area. The complex is scheduled to host six Perfect Game sponsored tournaments in 2011.

Lee County Sports Complex is an excellent facility but is occupied by the Twins and the Fort Myers Miracle a large portion of the year. Nonetheless, the complex will be one the biggest competitors to a new facility in Charlotte County.

Sarasota/Bradenton

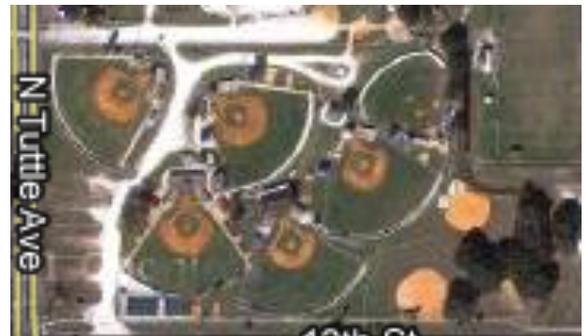
City of Sarasota Sports Complex: 2700 12th St, Sarasota, FL

The Sarasota Sports Complex is the home of Ed Smith Stadium and Spring Training for the Baltimore Orioles. The recently renovated Ed Smith Stadium is the centerpiece of the complex. In addition to the stadium, there are four (4) full size baseball fields and a practice infield. Across the street from the complex is the Nick Lucas Baseball Complex. The complex consists of six (6) youth baseball fields and two (2) soccer fields. All of the



youth fields are lighted and Ed Smith Stadium is the only lighted full size diamond.

The complexes are separated by 12th Street and the road acts as the dividing line between the two complexes. The first is the renovated Ed Smith Stadium and surrounding fields. Across the road is the Nick Lucas Baseball Complex, which features youth fields and is geared toward younger age groups.



Youth baseball is prominent in the Sarasota area and this is the premier youth location for recreation leagues and tournaments. The complex is the host of the Sarasota Babe Ruth youth baseball league and hosts the Cal Ripken Florida State Tournament with an entrance fee of \$300.

Twin Lakes Park: 6700 Clark Road, Sarasota, FL

Twin Lakes Park in Sarasota, FL is a large 123-acre baseball complex. The facility was previously used for Minor and Major League Baseball Spring Training, but is now primarily a youth sports venue. The complex consists of eleven (11) baseball fields of various sizes. The complex also features a basketball court, three soccer/football fields, racquetball courts, and tennis courts. There are five full size baseball fields and six youth fields.

Built in 1970, the complex was designed for a Major League team, at the time the Kansas City Royals. Since then the complex has been used by several different teams. The



complex layout features two pinwheel quads, one with adult baseball fields and one with youth baseball fields. The other fields are located around the two quads, which are the focal points of the complex.

The complex is the home facility for the Central Sarasota County Little League and Sarasota United Soccer League. The complex also hosts youth tournaments throughout the

year. The administrative buildings for Sarasota County Parks and Recreation are also located at the complex. The Twin Lakes Classic was hosted at the complex in March of 2011. The youth tournament was open to age groups 10U-12U and the entrance fee for the event was \$175.

Miss Sarasota Softball Complex: 4600 17th St, Sarasota, FL

The Miss Sarasota Softball Complex is located just a few minutes away from Ed Smith Stadium and the City of Sarasota Sports Complex. The softball facility features ten (10) softball diamonds and two (2) multi-purpose fields. All of the fields are natural grass and equipped with lights.

The complex layout offers a “pinwheel” quadruplex of adult softball diamonds with 300’ fences. The quad is separated from the rest of the facility by a wooded area. On the other side of the complex sit six (6) individual, enclosed youth fields with 200’ fences. There is a building



in the middle of the complex although it is unclear if there are any additional amenities at the complex.

The Miss Sarasota Softball Complex is the home of Miss Sarasota Softball, a competitive fastpitch softball organization. In addition to hosting local leagues and games, the facility hosts a number of softball tournaments throughout the year. One of the most frequent



users of the complex is USSSA. In 2011, eight USSSA tournaments were held at the complex across a wide range of age groups. The usual entrance fee for USSSA tournaments held at the Miss Sarasota Softball Complex is \$355.

Braden River Park: 5201 51st Ave. East, Bradenton, FL

The Braden River Park in Bradenton, FL is a multi-sport facility with both baseball and soccer fields. The Park includes seven (7) baseball fields, five (5) youth and two (2) full size, and three (3) soccer fields. All of the fields are natural grass and fully lighted.

The baseball fields in the complex are in very good condition with different size fields for various age groups. The soccer fields are in adequate condition but are very congested



with little room in between fields. In addition to the fields, amenities at the complex include:

- Lighted batting cages
- Bleachers
- Picnic tables
- Covered playground
- Restrooms

Braden River Park hosts youth leagues and teams as well as tournaments throughout the year. Among the tournaments include the

IBC Fall Classic, Nations State Championships, and Wreaking Havoc Tournament. The complex is also the home of the Braden River Soccer Club. The club hosts a Labor Day soccer tournament for which entrance fees range from \$350-\$450 and age groups from U9 to U18.

Lakewood Ranch Sports Complex: 5500 Lakewood Ranch Blvd., Bradenton, FL

Lakewood Ranch Sports Complex in Lakewood, FL is a large multi-sport facility. The complex consists of twelve (12) baseball fields, six (6) with grass infields and six (6) with skinned fields. The complex also offers eight (8) soccer fields, a football stadium with track, tennis courts, and basketball courts. The fields are natural grass and in relatively good condition.

The complex is located right next to Lakewood Ranch High School and the relationship between the complex and the school is unclear. The facility is divided into two distinct



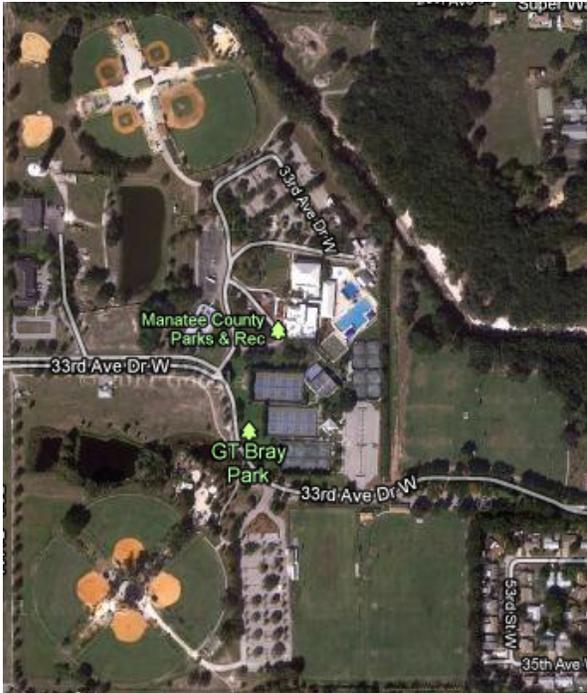
parts. The first features the twelve baseball fields. The second, separated by a parking lot, is made up of the soccer fields.

The Lakewood Ranch Sports Complex hosts a number of youth soccer, baseball, and softball tournaments. Between

baseball and softball tournaments, the complex was scheduled to host at least eight tournaments in 2011. Nations Baseball and USSSA are frequent users of the complex located just north of Sarasota. Tournaments held at the park are open to a wide range of age groups. The entrance fees for these tournaments range from \$175 to \$250.

G.T. Bray Baseball Complex: 59th Ave, West Bradenton, FL

The 140-acre G.T. Bray Park is a large multi-sport facility in West Bradenton, FL. The park consists of eight (8) baseball fields, four (4) with grass infields and four (4) skinned infields. Other attractions include three soccer fields, tennis courts, and an aquatic center.



The fields are all natural grass and equipped with lights.

The complex layout is divided in two phases. The first phase features a pinwheel quad of baseball fields. Three of the fields are youth diamonds and one of the fields is an adult diamond. Dividing the complex are the tennis courts, aquatic center, and the offices for the Manatee County Parks & Recreation. The second phase offers another pinwheel quad with baseball diamonds with dirt infields, as well as three soccer fields.

The G.T. Bray Baseball Complex hosts numerous youth tournaments and events across several different sports. For example, the 2011 Florida Fall Classic is to be held at the facility in September. The tournament is open to age groups 9U-14U with a flat entrance fee of \$205.

Highlands County Sports Complex: 320 Sheriffs Tower Road, Sebring, FL

The Highlands County Sports Complex is a large multi-sport complex located in Sebring, Florida. Sebring is a smaller town in the middle of the state, located on Lake Jackson. The complex is operated by Highlands County Parks & Recreation. The park features five (5) adult baseball fields with 300' fences and four (4) multi-purpose fields run the complex itself.

The complex layout is fairly basic and lacks any unique qualities. There is a five-field pinwheel layout with the baseball diamonds. All of the fields are natural grass outfields with skinned dirt infields. All of the fields are equipped with full lighting and the pinwheel features a central structure. Outside of the pinwheel are the four multi-purpose fields, one of which is set up for football.



The complex fairly good and the softball fields appear to be in fine condition. The Highlands County Sports Complex lacks any unique qualities and is in a relatively isolated location. Located inland, the complex is not on any major interstates and is in a low population area. Nonetheless, the complex has good facilities and is about a two-hour drive from coastal cities and towns.

The complex draws from all around the state, a positive of being located in the center of the state. The primary focus of the complex is softball, although baseball is also played at the facility. Although there are no USSSA events currently scheduled at the complex, it has been a frequent user in the past. Dixie Baseball also hosts tournaments in Highlands County.

Local Facility Summary

As is the case throughout most of the state, there are numerous baseball and softball facilities within one hour of the Charlotte County. In particular, there are an abundance of professional quality complex that primarily consist of full-size baseball diamonds. These complexes vary in terms of quantity of fields, quality of fields, amount of programming, and amenities. While there are a significant number of facilities, only two of these are located in Charlotte County, with the best complexes located in the Fort Myers area or the Sarasota area. This leaves a void for those that live in Charlotte County who would rather not drive outside of the county for their youth sports needs.

In addition to the fields previously listed, there are more municipal parks and complexes in the local area that are either too small or lacking in quality to warrant mention as a competitor in the region. The complexes within Charlotte County provide an option for local players, but do not attract major tournament play. Outside of the county, high

quality facilities such as Terry Park, Lee County Sports Complex, and the City of Sarasota Sports Complex will be the strongest competitors to a new complex in the local region.

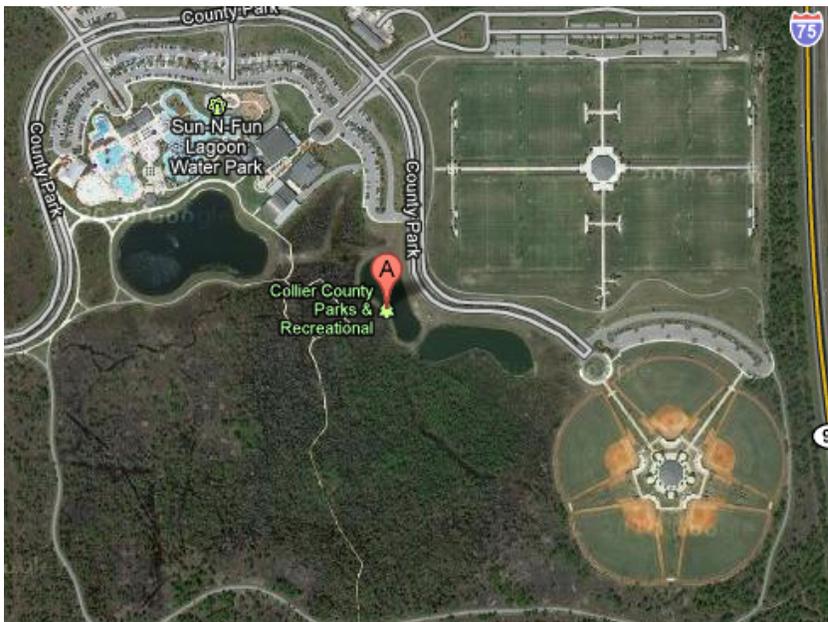
Several different organizations hold tournaments and events in the area, especially Perfect Game. The scouting and showcase organization has an entrenched presence in the Fort Myers area, holding numerous events across the major facilities in the area, particularly Terry Park the Lee County Sports Complex. However, Perfect Game focuses primarily on scouting and professional development and uses full-size diamonds almost exclusively, a very different programming model than what is proposed in Port Charlotte.

Sub-Regional Competition (1-2 Hour Drive)

This section eliminates some of the smaller sports complexes and community parks that may have been included in the Local Competition analysis and focuses solely on complexes with a significant field infrastructure or tournament history. Complexes are evaluated to establish a baseline of field quality and amenities and other design features that would need to be included at the proposed complex to enter the market as a top-tier complex.

North Collier Regional Park: 15000 Livingston Road, Naples, FL

North Collier Regional Park is a large multi-sport facility in Naples, Florida, approximately an hour drive south of Port Charlotte. The complex is owned and operated by Collier County and consists of five (5) adult softball fields with dirt infields and four (4) full size soccer fields. All of the fields have 300' fences although there are lines drawn in the outfields marking the dimensions for youth games.



The fields at North Collier Regional Park are in very good condition. The layout of the complex consists of a pinwheel with the five (5) softball fields and a structure in the middle. The four (4) soccer fields are north of the pinwheel of baseball fields. In addition to the sports fields, the Sun-N-Fun Lagoon Water Park is located on the site and is offers a major attraction for visitors.

North Collier Regional Park is a tournament venue for USSSA in addition to hosting local youth teams and groups. Three USSSA tournaments are scheduled at the complex in

2011 including the Labor Day Classic, Battle of the Wood Bats (3 game), and the X-Mas Grand Slam (4 game/3 day). Entrance fees for these tournaments range from \$190 to \$415.

Chain of Lakes Park: 299 Florida Citrus Boulevard, Winter Haven, FL

The Chain of Lakes Park in Winter Haven, FL is the former Spring Training home of the Cleveland Indians and a youth baseball complex. The park consists of seven (7) baseball fields, one of which is the main stadium for the Indians. All of the fields are full size although one of the diamonds is not much more than a practice infield.

The Chain of Lakes Complex is one of the older Spring Training facilities in Florida.



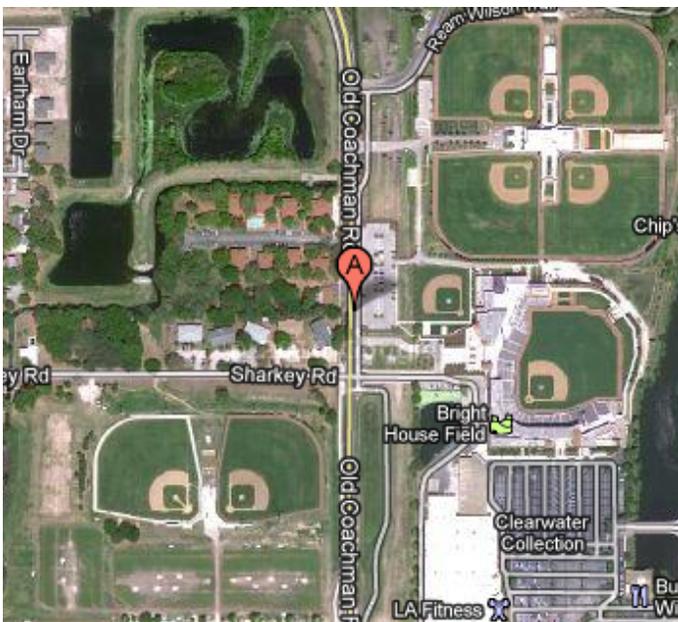
There is one pinwheel quad of fields; two stand alone fields, and the Stadium field. All of the fields are natural grass fields and in very good condition although only the Stadium is equipped with lights.

The Chain of Lakes Complex is involved in youth baseball events and tournaments. One of the most frequent users of the complex is Florida AAU Baseball through Chet Lemon's Sunshine Athletics. There are three tournaments scheduled at the park and the price for these events

is \$345.

Carpenter Baseball Complex: 651 Old Coachman Rd. Clearwater, FL

The Carpenter Baseball Complex in Clearwater, Florida is an excellent facility and the Spring Training home of the Philadelphia Phillies. When not in use by the Phillies, their



Gulf Coast League affiliate, the Gulf Coast Phillies occupy the facility. The complex features seven (7) full size baseball fields including the main stadium, Bright House Field. There are also three (3) soccer fields at the complex.

The baseball fields are in excellent condition and very carefully maintained. In contrast, the soccer fields are in very poor shape and are worn down.

Nonetheless, the facility is primarily a baseball complex.

The Carpenter Baseball Complex hosts a number of youth baseball tournaments each year. It is listed as a venue location for the IBC Baseball World Series and has hosted tournaments though Nations Baseball in the past although there are no tournaments scheduled for 2011.

Lake Parker Park: 910 Granada St, Lakeland, FL

The Lake Parker complex is a large multi-sport complex in Lakeland, Florida. The facility is owned and operated by the City of Lakeland and consists of seven (7) baseball fields. The site is the home of Joker Marchant Stadium and the Detroit Tigers Spring Training, as well as the Tigers' Minor League affiliates Lakeland Flying Tigers and Gulf Coast Tigers. All of the fields in the complex are natural grass, although only Joker Marchant Stadium is equipped with lights. In addition to the baseball diamonds, the park offers three (3) full-size soccer fields.

The 100-acre Lake Parker Park is located right on Lake Parker and has trails throughout the large facility. Along with baseball, there are also tennis courts, volleyball courts, shuffleboard, a roller hockey rink, boating and boat ramps, lawn bowling, two playgrounds, and restrooms and concessions.



The complex hosts a number of tournaments each year. Perfect Game is one organization that holds events at the complex. They held the 2011 East Coast Professional Showcase at the Lakeland facility. Lake Parker Park is the old guard of Spring Training facilities with fewer fields than some of its competitors. Nonetheless, the complex is in very good condition and a competitive facility.

Eddie C Moore Complex: 3050 Drew St, Clearwater, FL

The Eddie C Moore Softball Complex in Clearwater, Florida is a multi-sport complex with a strong focus on softball. The complex consists of seven (7) baseball/softball fields and three (3) soccer fields. All of the diamonds have natural grass outfields, dirt infields, and are equipped with lights. The ball fields all have moveable fences to accommodate both youth and adult teams.

The complex layout is divided in two parts, separated by a wooded area. The first phase consists of a pinwheel of four softball fields as well as three soccer fields outside of the quad. The second phase, connected by a trail, features three additional softball fields. There is nothing exciting about the facility, but the fields are in very good condition.

The Eddie C Moore Complex hosts many youth softball and baseball tournaments throughout the year. Softball tournaments such as the Lady Bombers Bye-Bye Summer Brawl and the Florida South Fall States Toys-4-Tots and baseball tournaments such as



the Florida Major Elite 2K12 and the MLK Weekend Preseason Blast are all held at the complex. Entrance fees for these tournaments range from \$300 to \$595 and are open to all age groups.

Lake Myrtle Sports Park: 2701 Lake Myrtle Park Rd, Auburndale, FL

The Lake Myrtle Sports Park is a baseball and soccer complex located along Lake Myrtle in Auburndale, FL. There are five (5) full size, lighted baseball fields and eleven (11) lighted soccer fields. All of the fields in the complex are natural grass and appear to be



very well maintained. The fields are natural grass, fully irrigated, and equipped with subsurface drainage systems. There is one soccer stadium field with seating capacity up to 1,000 and an electronic scoreboard for soccer and all of the baseball fields have an electronic scoreboard. The baseball stadium field has seating for up to 500 spectators.

There are two main concession stands on site that have bathrooms and meeting space for events. There are five (5) pavilions throughout the soccer complex. There is one concession stand with bathrooms in the baseball complex and there are covered bleachers for spectators. There are over 1,000 parking spots on site for both the soccer and baseball fields.

The complex is the host for many tournaments throughout the year including baseball, lacrosse, basketball, and soccer events. The facility is owned and operated by the City of Auburndale. USSSA is one of the most frequent users of the complex and hosted tournaments such as the “War on I-4” and the USSSA Fall National Championship. Entrance fees for tournaments hosted at the Lake Myrtle Sports Complex range from \$200 to \$595.

Raymond Naimoli Baseball Complex: 7901 30th Ave. N, St. Petersburg, FL

The Raymond Naimoli Baseball Complex is a large baseball and softball complex in St. Petersburg, Florida. Named after the former Tampa Bay Rays Executive, the complex offers nice facilities in the heart of St. Petersburg. There are five (5) baseball diamonds with 90’ base paths and another five (5) fields are built to various youth specifications. All of the diamonds are natural grass except for one synthetic turf field. All of the fields are equipped with lights.



Four of the main adult-size fields are built in a pinwheel around a small, central structure. The additional adult field is just outside of the main pinwheel. Separated by two multi-purpose fields is another pinwheel with five youth diamonds. The fields are built beside a small lake. On the opposite side of the lake is the Walter Fuller Public Pool along with four tennis courts.

The complex is not currently scheduled to host any USSSA events although it appears it has in the past. In 2010 the complex hosted the Under Armour Invitational with teams comprised of high school age players. The entrance fee for the tournament was \$795 with four games guaranteed per team. The complex also hosts high school spring training during February and March.

The complex is in a prime location in the biggest population center on the West Coast of Florida, although it does not host a large volume of tournaments annually.

Ed Radice Sports Complex: 14720 Ed Radice Dr, Tampa, FL

The 138-acre Ed Radice Sports Complex is a large multi-sport facility in Hillsborough County, just north of downtown Tampa, FL. The complex consists of eleven (11) baseball diamonds, four (4) with traditional grass infields and seven (7) skinned dirt infields, as well as nine (9) multi-purpose fields. Six (6) of the diamonds are full size diamonds with approximately 280’ fences.

The complex layout is fairly basic, featuring two pinwheel quads and three outlying fields. The first pinwheel features five (5) full size skinned infield diamonds, all of which are equipped with lights. The second pinwheel consists of one (1) adult baseball field, three (3) youth baseball fields. Outside of this quad are three additional youth fields.



Although there was not a high volume of events scheduled for 2011, the Ed Radice Sports Complex has hosted a variety of events in the past. Such events include the AAU Baseball Winter Nationals, the Florida High School Athletic Association (FHSAA) Softball Championships, and the Florida Youth Soccer Association America's Cup.

North Tampa Park: 6800 N Rome Ave., Tampa, FL

North Tampa Park is a municipal park in Tampa, Florida. The park consists of five (5) baseball fields and two (2) soccer fields. The park is small compared to the other complexes on this list and is located in a residential area. Two of the baseball fields are adult fields and the others three diamonds are smaller youth fields. All of the baseball diamonds have grass infields.



The fields are laid out so that each field is separate and its own structure. All of the fields are enclosed, natural grass, and equipped with lights. The quality of the fields are also substandard relative to some of the nicer complexes in the region.

Despite being a smaller complex, North Tampa Park hosts a fair number of youth baseball tournaments through Nations Baseball. At least four tournaments were

scheduled at the park through Nations Baseball in 2011. The entrance fees for tournaments held at North Tampa Park range from \$200 to \$300.

Mike E Sansone Community Park: 1700 South Park Road, Plant City, FL

Mike E Sansone Community Park is home to seven (7) youth baseball fields, five (5) with grass infields and two (2) with skinned infields, and two (2) adult baseball fields. In addition to the ball fields the complex offers:

- Outdoor Basketball Courts
- Beach Volleyball Courts
- Two (2) Playgrounds
- Three (3) Concession/Restroom Buildings
- Four (4) Picnic Pavilions

The park offers a smart layout, departing from the usual quad pinwheel layout. The park is located right next to the Otis M Andrews Sports Complex, which features extensive soccer facilities that Sansone Park is unable to provide. All of the fields are equipped with full lighting and are all natural grass fields. There are bleachers available at each field for spectators as well as scoring booths.



Sansone Community Park hosted several USSSA youth baseball tournaments at the complex including the UFC III- NIT Powered by No Errors and the Fall Florida Elite NIT. These tournaments served a wide range of ages and entry fees ranged from \$300-450

Larson FourPlex: 1510 S Park Rd, Plant City, FL



The Larson FourPlex in Plant City, FL is a 75-acre softball complex that is part of the Plant City Recreation and Parks. The complex includes five (5) softball fields including Plant City Stadium. All fields are natural grass and fully lighted. The field layout consists of a pinwheel quadruplex and Plant City Stadium as a separate structure.

The FourPlex is also the home of the International Softball Federation and

the future Softball Hall of Fame. Other amenities at the complex include 6,700 seating capacity at the stadium, restrooms, concession stands, lighted parking, playground, and a pavilion.

The facility hosts many tournaments such as the Florida High School Softball Championships and other international and domestic events. The complex also hosted the Tampa Bay FireStix and the Florida Wahoos of the Women's Professional Softball League before the league folded in 2001. It also hosted the 1999 WPSL All Star Game. Tournaments held at the complex include the Suncoast Sports Fest and the Tampa Venom March Madness. These tournaments are open to all age groups with entrance fees ranging from \$250 to \$300.

Land O' Lakes Recreation Complex: 3032 Collier Parkway, Land O Lakes, FL

The Land O' Lakes Recreation Complex is an 80-acre facility with ten (10) baseball fields, eight (8) with grass infields and two (2) with skinned infields, and eight (8) soccer fields. The baseball fields are in much better condition than the soccer fields, which appear to be very worn down and neglected, but also face significant maintenance issues. Other amenities available at the park include:



- Tennis Courts
- Playgrounds
- Dog parks
- Pool
- Picnic shelter
- Gymnasium
- Two meeting rooms

The pool facility features an Olympic size pool and a diving well.

In addition to tournaments held throughout the year, the complex offers a variety of classes including karate, gymnastics, tennis, aerobics, and cheerleading among others. There are also basketball, baseball, soccer, and football leagues held at the complex for both adults and youth.

The Land O' Lakes Recreation Center is not a major factor in youth tournaments. It does boast a large number of fields, but the quality of the fields appears to be lacking. The facility does have a number of amenities across several different sports, but its draw is local sports as opposed to major competitive tournaments.

Tampa-St. Pete-Naples-Lakeland Summary

These areas represent major population centers within the state, and therefore boast numerous competitive facilities. In addition to the complexes described, there are many other facilities that either lacks the quality or quantity of fields to be considered strong competitors. However, it is important to note that these smaller complexes and parks host their fair share of local programming.

The best facilities include the Ray Naimoli Baseball Complex, the Ed Radice Baseball Complex, and Lake Myrtle Sports Park. These complexes stand out because of the relatively high quality facilities, amenities, and quantity of fields they are offer. Furthermore, as is the case throughout much of Florida, this region features several Major League Spring Training facilities such as the Carpenter Baseball Complex and Chain of Lakes Park. In addition to these complexes, facilities in this range feature some of the best competitive softball complexes in the state.

However, the none of the existing facility feature complexes that are comparable to the major “destination” facilities that have developed elsewhere in the country. Even from a local perspective, few complexes have a critical mass of youth-sized fields, and most lack the on-site amenities to offer an environment attractive for repeated attendance. Ripken Design expects that Charlotte County-based teams that currently travel out of the area to play in tournaments in Tampa, St. Petersburg, Lakeland, or Naples, will regularly stay in Charlotte County for typical tournament play. Additionally, teams from these areas will be compelled to travel to Charlotte County provided they are offered superior facilities and a competitive, or even premium, price point.

Regional Competition (2+ Hours)

This section profiles regional facilities that have an established reputation for excellent facilities and consistently host youth tournaments. Among the complexes included in the regional analysis are some of the most successful complexes in the state and have gained national recognition. These complexes establish the standard to compete at the regional level.

Miami

Grapeland Heights Park: 1550 NW 37th Avenue, Miami, FL

The 13-acre park, located just south of the Miami International Airport, is limited in total size but still offers a wide range of facilities to its visitors. Opened in May 2008 for the cost of \$33.8 million, the park is a family friendly venue featuring four (4) skinned baseball/softball fields and an aquatic center. The park also borders the Melreese Golf Course.



The four diamonds each have slightly different dimensions. Two of the fields are designed for youth play, one with 200' fences and the other with 175' fences. The other fields are larger, featuring fences measuring about 225-250' down the foul lines. The aquatic complex features four different pools including a small activity pool, water playgrounds, a lazy river, and a resort-style pool. The park also offers a 5,600 square-foot community center for the park's offices, restrooms, and multipurpose rooms.

The park did not host any large youth tournaments in 2011 although the Miami Youth Baseball Association lists the complex as a preferred location. While Grapeland Heights Park does not regularly host major tournaments, it does draw local interest in the Miami area and offers the on-site attraction of a water park.

Weston Regional Park: 20200 Saddle Club Road, Weston, FL

The 102-acre Weston Regional Park is an excellent public park just outside of Miami, FL. The complex offers facilities for a variety of sports including baseball, softball, soccer, football and basketball:

- Eight (8) Baseball/Softball Fields
- Eight (8) Soccer/Football Fields
- Eight (8) Basketball Courts
- Four (4) Full Size Roller Hockey Rinks
- Three (3) Junior Size Hockey Rinks
- One (1) Skate Park
- Four (4) Play Grounds
- Three (3) Sand Volley Ball Courts
- Five (5) Concessions with Restrooms

The complex layout is fairly basic with the baseball and softball fields situated in two (2) pinwheel quads. There are five (5) grass infields and three (3) skinned infields, and all of the fields are fully lighted. Two of the fields have 300' fences and the other six fields have approximately 220' fences.

The Weston Regional Park held two USSSA tournaments in 2011. These tournaments include the Weston Hawks NIT and the Weston Rattlers USSSA NIT. The entrance fee for the Weston Rattlers USSSA NIT was \$450.

Pembroke Shores Park: 501 SW 172nd Avenue, Hollywood, FL

The Pembroke Shores Park is a multi-sport municipal park located just north of Miami. The park consists primarily of eight (8) baseball and softball fields, along with local YMCA indoor facilities.

The complex features a traditional layout with the baseball and softball fields situated in two pinwheel quads. There are five (5) skinned infields and three (3) grass infields, and all of the fields are fully lighted. Four of the fields have 300' fences and the other four fields have approximately 250' fences.



Pembroke Shores Park held six (6) USSSA baseball tournaments in 2011. Tournaments included the FPBL League Championship, FPS League Championship, Cobras Heartbreaker Tournament, FPBL Spring League Championship, West Pines Cobras 4th of July Tournament, and the SFBA All Star Tournament. The tournaments range in length from 2 days to weeklong events. Over the course of these tournaments 407 teams visited the complex. This volume of programming is remarkable given the clearly substandard quality of fields offered at Pembroke Shores.

Miami Summary

The Miami market, one of the largest in the country, let alone Florida, lacks a first class youth baseball facility. The three complexes listed in this section have hosted youth tournaments in the past but lack the size and quality to attract the best teams and tournaments. Due to the glut of complexes to the north of Port Charlotte, a new facility in Charlotte County should be able to draw significantly from the Miami market.

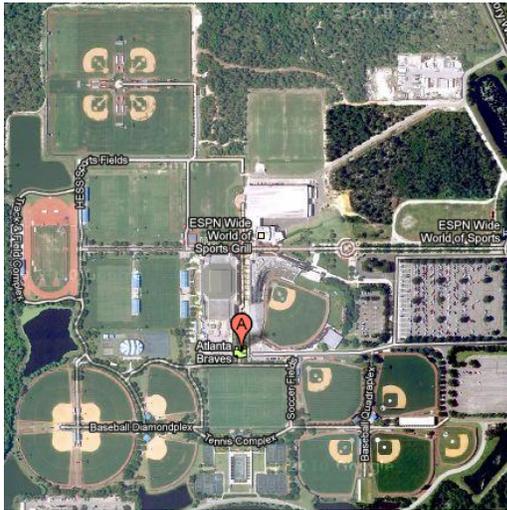
Port Charlotte is approximately a three-hour drive on I-75 from Miami. A new complex in Port Charlotte would be about the same distance from Miami as Cocoa Beach, FL, home to the Cocoa Expo Sports Complex. Through USSSA alone, there are 93 youth teams in the Miami area and it will be critical to draw these teams to the Port Charlotte market.

Orlando-East Coast

ESPN Wide World of Sports Complex: 700 Victory Way, Kissimmee, FL

The ESPN Wide World of Sports Complex is a massive 220-acre state of the art complex equipped with youth and adult baseball, softball, and soccer fields. There are ten (10) baseball fields, six (6) baseball/softball diamonds with skinned dirt infields, and nine (9) soccer fields. All of the fields are lighted and very well maintained. The Champion baseball stadium is the home of the Atlanta Braves Spring Training.

In addition to the fields, the main baseball diamonds have 10,000 square feet of batting tunnels, pitching machines, and ten (10) bullpens. Additionally there is a tennis complex, track & field complex, and a 5,000-seat arena. Although not designated for baseball, the complex plans to add 25 acres of new facilities in 2012.



The complex hosts tournaments throughout the year as well as various training programs and special events. The ESPN World Wide of Sports complex hosts tournaments such as ESPN Prime Time and ESPN Super Elite as well as USSSA tournaments like the USSSA ESPN Rise Baseball World Championships. Entrance fees for these tournaments were \$495.

Amenities include the ESPN Wide World of Sports Grill, the PlayStation Pavilion outfitted with 16 40 inch TVs and 17 PS3 systems, restrooms, and concession stands. There is an entrance fee of \$14.50 for adults over 10 and \$10.00 for children ages 3-9. The ESPN Worldwide of Sports Complex is a phenomenal facility and a competitor to any new complex in the state.

Osceola County Softball: 3000 N John Young Parkway Kissimmee, FL

The Osceola County Softball Complex is a softball complex located in Kissimmee, Florida. The facility is on the smaller end of the scale, featuring five (5) adult softball fields. All of the fields are natural grass and equipped with lights. The fences on each field have the ability to be moved in for youth events. Other amenities include a clubhouse, electronic scoreboards, bleachers, and a covered playground for families.



The softball fields at the Osceola County Softball Complex are in excellent condition and are maintained with an underground irrigation system. The layout of the complex is basic and lacks any unique qualities. There is one pinwheel with all five (5) fields and the clubhouse is located in the middle. The three-story clubhouse is the centerpiece of the complex.

The complex is an excellent softball venue and has hosted elite level events. The park was a training facility for the 2000 USA Women's Softball team and hosts the annual Spring Rebel Games. Additionally, they hosted at least seven tournaments in 2011 and the entrance fee for these tournaments ranged from \$300-500.

Cocoa Expo Sports Center: 500 Friday Road, Cocoa, FL

The Cocoa Expo Sports Center in Cocoa, FL is a recently renovated, state of the art baseball facility. Originally built for Major League Spring Training, the complex deteriorated over the past decade before the whole sale renovations that took place in 2011. The facility now features twelve (12) baseball fields, ten (10) with grass infields and two (2) with dirt infields, and an indoor baseball facility. Three of the baseball fields are youth fields with 220' fences.

The renovated Cocoa Expo Sports Center will be laid out around the centerpiece of the complex, Cocoa Expo Stadium. The 5,500-seat stadium is equipped with a new sound system, press box, 30' video scoreboard, and a pro shop. On one side of the stadium will be a pinwheel quadruplex with baseball fields and two additional stand alone fields. On the other side of the stadium will be a pinwheel with the five youth baseball diamonds.



Construction on the complex began in the summer of 2011 and is expected to be finished in time for the 2012 season.

Programming at the complex includes instructional camps for all ages, fall, winter, and spring leagues, weekend tournaments, national invitational tournaments, and spring training for high school and college teams. The 2012 schedule for the complex is currently unavailable.

Vero Beach Sports Village: 3901 26th Street, Vero Beach, FL

Vero Beach Sports Village is a high quality, multi-sport complex located at the former Los Angeles Dodgers Spring Training Facility. The complex, now owned by Minor League Baseball (MiLB), consists of seven (7) baseball fields, including Holman Stadium, the centerpiece of the complex. There is also room for five (5) full size soccer fields in the outfields of five of the baseball fields. Holman Stadium offers 6,500 seats for visitors.



The complex layout does not feature any pinwheels, breaking from the norm. Vero Beach Sports Village provides an all-inclusive experience for visitors, meaning the complex offers everything a group needs on site. There are 89 hotel-style villas, an on-site dining facility, picnic areas, laundry area, and a full-service

business center.

When the Dodgers left the facility in 2008, the Vero Beach Sports Village turned its full attention towards youth programming. Although the primary purpose of the complex is for baseball, the complex has actively marketed itself to a variety of sports, especially soccer and lacrosse. There are five events scheduled for the remainder of 2011, with several scheduled for early in 2012. There are plans for a \$2.5 million addition of four new fields, however MiLB has shown interest in selling the property. It was reported to have lost \$1 million last year and is expected to lose money again in 2011. Although

programming has increased, the future is unclear.



Roger Dean Complex: 4751 Main Street, Jupiter, FL

The Roger Dean Sports Complex in Jupiter, FL is the Spring Training home of the St. Louis Cardinals and Florida Marlins, as well as the regular season home for the Jupiter

Hammerheads and Palm Beach Cardinals. The \$28 million complex opened in 1998 and sits on 110 acres just off of I-95. The complex includes twelve (12) full size baseball fields and two (2) practice infields. Four of those fields are equipped with full lighting.

The complex hosts two of the largest high school baseball tournaments; the USA Baseball Junior Olympic Tournaments and the Baseball America/Perfect Game Baseball Wood Bat Championship. In addition to baseball, the complex can be rented out to host company events, meetings, fund-raisers, graduation ceremonies, or private functions.

The Roger Dean Complex is an excellent facility in Jupiter Florida. Although its primary obligation is to the St. Louis Cardinals and Florida Marlins it also hosts youth tournaments for older age groups and is a competitor with a new complex in Port Charlotte for that type of programming.

Northwest Recreation Complex: 3200 Jason Dwelley Pkwy, Apopka, FL

The Northwest Recreation Complex is a large multi-sport facility in Apopka, FL, just north of Orlando. The complex consists of twelve (12) baseball fields, six (6) with grass infields and six (6) with skinned dirt infields, and fourteen (14) soccer fields. The facility is located next to both Wolf Lake Elementary and Wolf Lake Middle School. All of the fields are natural grass and equipped with lights.



The layout features three pinwheel quads. One consists of four (4) youth baseball diamonds, another offers four (4) adult fields, and the last comprises four (4) more adult diamonds. None of the fields are maintained to a very high standard.

The Northwest Recreation Complex frequently holds youth sports tournaments including baseball, softball, and soccer events. USSSA and Florida AAU baseball are consistent users of the facility. Tournaments held at the complex in 2011 included the Labor Day Classic, the New Era Championship, and the Fall State Warm-up NIT. These tournaments are open to a wide range of age groups and the cost ranges between \$300 and \$425.

Orlando-East Florida Summary

The complexes in these parts of Florida, between 2-4 hours from the complex, are among the best in the state. The ESPN Wide World of Sports Complex is nationally recognized as one of the best youth sports facilities in the country. The Cocoa Expo Sports Complex is brand new and boasts state of the art facilities. The Roger Dean Sports Complex in Jupiter, Florida is a first class baseball facility with 12 perfectly manicured fields.

The Orlando area has a competitive advantage over the rest of the state because of the presence of Disney World. The Orland Tourist Information Bureau estimates approximately 50-million people visit the Orlando area each year, the largest attraction, of course, being the Disney amusement parks. The ESPN Complex is the gold standard for complexes in Florida while at the same time being an outlier because of the presence of Disney World.

All of these areas are within a four-hour drive of Charlotte County, within the expected driving distance for premier tournament competition. However, the predominant field distribution trends towards full-size diamonds, and youth facilities are often poorly maintained, inadequately sized or buoyed by skinned infield diamonds. Although the facilities highlighted in this section receive a large volume of annual programming, it is much more likely that a new facility in Port Charlotte will add itself to the inventory of high-quality facilities than these existing facilities are to crowd it out of the marketplace.

Jacksonville and North Florida

The World of Baseball: 7775 Old Kings Rd, Jacksonville, FL

The World of Baseball Complex is a baseball academy and tournament venue just north of downtown Jacksonville. Built in 2006, the facility features four (4) manicured baseball diamonds, two of



which have 90' base paths and 300' fences and two with 60'/70' base paths and 200' fences. The fields are all enclosed, natural grass diamonds with dugouts.

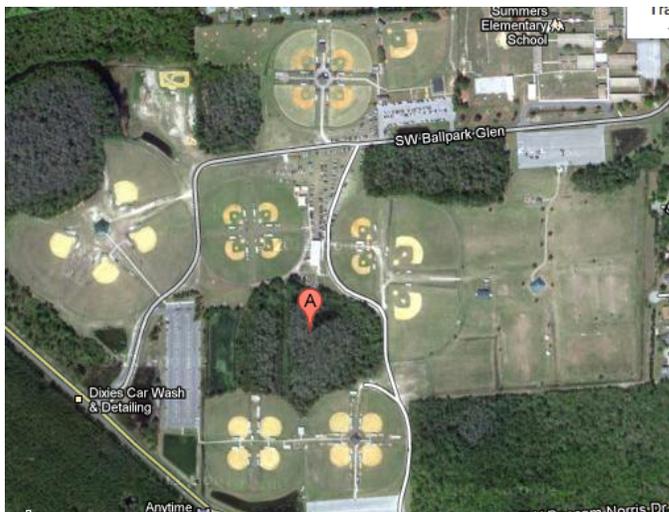
The complex is a non-descript from the

outside but does feature four moderate quality fields. The diamonds are not in the traditional pinwheel layout, but none are oriented correctly with the sun. As you enter the complex the first two fields are the two adult-sized diamonds, followed by the two youth fields. There is no central structure at the complex although the satellite image is dated. The complex is located in a residential area on the northern outskirts of Jacksonville.

The complex is primarily a baseball academy for youth players seeking to improve themselves and get recognized for college or professional baseball. In addition to the academy, the complex has hosted the World of Baseball College Tour, featuring top NCAA teams preparing for their seasons, and is the home field for North Florida AAU leagues and tournaments.

Southside Recreation Complex: 1963 SW Bascom Norris Drive, Lake City, FL

The Southside Recreation Complex is a large baseball and softball complex located in Lake City, Florida. The massive complex boasts twenty-five (25) baseball and softball fields. Twelve (12) of the diamonds have skinned infields and thirteen (13) diamonds feature grass infields.



As is the case with most complexes of this size, the layout and design of the diamonds is fairly basic. There are six pinwheels with four fields each. All of the fields are natural grass and appear to be in relatively good condition. The biggest detractors from this facility are the design and the general lack of amenities at the complex. There seems to be few attractions outside of the athletic fields.

The Southside Recreation Complex is a large complex featuring fields of all different sizes. The complex hosted eleven tournaments through USSSA in 2011, all of which included multiple age groups. Two such tournaments include the NE Fall State Championship and the FL Vs. GA Showdown NIT. The entrance fee for these tournaments ranges from \$345 to \$450. Over the course of these tournaments, USSSA estimates 445 youth teams visited the complex.

Freeport Regional Sports Complex: 563 Hammock Trail East Freeport, FL

The Freeport Regional Sports Complex is a 50-acre park consisting of five (5) baseball fields and two (2) full size soccer fields. All of the fields are lighted and the baseball fields have dugouts with electrical outlets.

Other features of the club include seven (7) covered pavilions with picnic tables, grills, and wireless Internet. There are all three (3) tennis courts, two (2) basketball courts, playground, and a disc golf course. Located on the Florida panhandle, Freeport sits in the middle of Pensacola, Panama City, and Tallahassee.

The Freeport Regional Sports Complex has two different fee schedules, one for non-profit organizations and one for commercial groups. For non-profit groups in non-tournament play, there is a \$20.00 fee per field per hour without lights, \$35.00 fee per field per hour with lights. For commercial groups those fees increase to \$30.00 and \$45.00 respectively. For tournament play (up to 8 hours), non-profit groups are charged \$100 for one field for the day without lights. There is a \$60 fee for each additional field and \$20 for each additional hour. Lights are \$20 per hour per field. For commercial groups one field costs \$125 per day without lights with \$75 for each additional field and \$25 for each additional hour. Lights costs \$20 per hour per field. There is also a fee for field preparation.

It is unclear how many tournaments the complex hosts throughout the year. Its location in Northern Florida is relatively small and competes directly with several other complexes on the Florida panhandle that are better suited for large youth tournaments.

Frank Brown Park: 16200 Back Beach Rd, Panama City Beach, FL

Frank Brown Park is an over 200-acre municipal park in Panama City Beach, Florida. The complex, located less than a mile from the Gulf of Mexico, offers excellent recreation facilities. Fields and amenities at the park include:

- Nine (9) Softball/Baseball Fields
- Two (2) T-Ball Fields
- Three (3) Soccer Fields
- Four (4) Multi-purpose Fields
- Four (4) Tennis Courts
- Two (2) Outdoor Basketball Courts
- Playground
- Indoor Gymnasium
- Fishing Pond
- Fenced Dog Play Area



The Frank Brown Sports Complex is a dominant youth baseball and softball complex in northern Florida. The facility hosted 25 baseball and softball tournaments in 2011, including the Spring Break Smash V, The King of the South Tournament, and the Sandlot Shootout II. The majority of these tournaments were weekend events, although there were five (5) weeklong tournaments in 2011. This level of programming is surprising given the low quality of the fields, all-skinned infields and generally unimpressive baseball/softball amenities.

Santa Rosa Sportsplex: 5976 Chumuckla Highway, Pace, FL

The Santa Rosa Sportsplex is a large baseball and softball complex located in Pace, FL on the Florida Panhandle. The facility, just north of Pensacola, consists of sixteen (16) baseball fields, eight (8) with grass infields and eight (8) with dirt infields. There are four youth baseball, four adult baseball, four youth softball, and four adult softball fields. In addition to the diamonds, the Sportsplex offers tennis courts, although there are not many other amenities.



The layout of the complex is in line with the traditional pinwheel complexes elsewhere in the state. The facility is made up of four pinwheel quads. There are two quads of adult-sized fields and two quads of youth sized fields.

Furthermore, the fields are not in very good condition. The fields are in mediocre condition.

The Santa Rosa Sportsplex is a major venue for youth tournaments in the Florida Panhandle. The complex is scheduled to host at least thirteen tournaments in 2011. The primary user of the complex is Nations Baseball. Tournaments held at the complex include the ASP Gulf Coast Super Regional, the 2011 Gulf Coast Ultimate World Series, and the 2011 Gulf Coast Elite National Championship among others. Entrance fees for these tournaments range widely, from \$100-695.

Regional Summary

Although not the target player pool, the ability to draw teams from the regional market is critical to the success of the proposed complex in Charlotte County. The largest population center in this area is the Jacksonville area and northern Florida. A first-class venue in Charlotte County would be able to take advantage of these markets, although should not be dependent on drawing teams from this region.

The Southside Recreation Complex and the Freeport Regional Sports Complex highlight the regional competitors. The Southside Recreation Complex's strength is in its number of fields, featuring 25 fields in total. The Freeport Regional Sports Complex, with five (5) baseball fields, is a brand new complex with excellent facilities and amenities.

Georgia Competition

This section includes the top youth baseball and softball facilities in Georgia. Due to the distance from the proposed complex, only the complexes with exceptional facilities or an extensive history of tournament scheduling are included. While these complexes will likely not compete directly with the proposed baseball facility in Port Charlotte, they may seek to attract the same teams for tournaments of longer duration or greater prestige.

South Commons Regional Sports Complex: Columbus, GA

The South Commons Regional Sports Complex in Columbus, GA was originally built in preparation for the 1996 Atlanta Summer Olympics. The softball complex consists of eight (8) excellent diamonds, all with skinned infields and grass outfields. Furthermore, all of the fields are equipped with full lighting, dugouts, bullpens, and bleachers.



Five of the fields are positioned in a pinwheel formation around a central concessions building. The three other fields sit around the pinwheel with Golden Park, the Championship field, as the centerpiece. Golden Park was first built in 1906 as a baseball park before being renovated for the Olympics.

In addition to the Olympics, the park has hosted NCAA baseball and softball games, as well as, local and regional youth tournaments. ASA has held many events at the complex including three tournaments in 2011.



George Harris Sports Complex: 131 Ragland St, LaGrange, GA

George Harris Sports Complex is a fourteen (14) field complex located in LaGrange, GA. There are eight (8) baseball fields total, two (2) adult and six (6) youth, and six (6) adult softball diamonds. The fields are set up in two pinwheel formations, one of which contains five (5) baseball diamonds with three (3) more above the wheel, and the other with four (4) softball diamonds with two (2) more beneath the wheel. There are four (4) pavilions within the complex, three (3) of which are near the baseball fields. The park has parking lots throughout the complex, curved around the pinwheels.

There is a 9-hole golf course adjacent to the fields as well as a small pond/lake to the right of the fields.



The softball complex hosts various baseball and softball tournaments throughout the year. For example, the Champs wear Rings Classic is a softball tournament held at the complex in September. Also, the Lagrange Last Pitch Classic is a baseball tournament held at the complex. These tournaments are open to a

wide range of age groups and entrance fees for the event range from \$250 to \$390.

East Cobb Baseball Complex: 4617 Lee Waters Road, Marietta, GA

The East Cobb Baseball Complex is an excellent baseball and softball facility located north of Atlanta in Marietta, GA. The park consists of four (4) baseball fields and four (4) softball fields. All of the fields are natural grass, enclosed, and equipped with full lighting. East Cobb Baseball Complex is owned and operated by ECB, Inc. a non-profit 501(c)(3).



The complex is maintained in excellent condition and offers an array of amenities. The complex has indoor and outdoor batting cages, meeting rooms, covered dugouts, and living space for traveling teams.

The complex is the host of numerous youth tournaments throughout the year and is a major stop for college and professional scouting. USSSA, Perfect Game, and East Cobb Baseball use the facility for events. For example, the complex is scheduled to host the Annual ECB Halloween Wood Bat Invitational in October. The tournament is open to

ages 9-18 and the entrance fee ranges from \$490-\$620.

The East Cobb Baseball Complex is one of the best and most successful baseball complexes in the region. The facility has attracted teams from all over the country and has become a destination for all age groups, especially high school athletes with aspirations of college or professional baseball.

Southern Pines Regional Complex: 675 Southern Pines Rd, Dublin, GA 31021

The Southern Pines Park located in Dublin, GA is 120.25-acre park that includes public facilities that also host a number of local and regional tournaments through USSSA and Grand Slam Sports. The facilities amenities include:

- 15 lighted baseball/softball diamonds
- 4 batting cages
- 4 concession stands/restroom buildings
- Playground
- Picnic Shelter
- Walking Trails
- 1,700 Parking Spots

Fields at Southern Pines Regional Sports Complex are tournament quality grass fields.



Additional amenities have been spread throughout the complex to allow for entertainment options for spectators and players alike. 1,700 parking spaces are also available on-site. In 2008, Southern Pines hosted 53 USSSA tournaments with entrance fees ranging from \$275 to \$375. The complex is located directly off Interstate 16 and has become a top destination for regional competition. The full-skinned infield set-up is a downside to the complex, but is overcome by an overall well-run complex.

Georgia Summary

The Georgia market is outside of the regional drawing radius described in the *Drive Time Analysis*, but within the regional footprint. While the complexes in Georgia would not necessarily compete directly with a new complex in Charlotte County, their presence in the market cannot be ignored. Many of the successful complexes in Georgia draw heavily from northern Florida, a regional market for the proposed complex in Charlotte County.

The best complexes in Georgia are the East Cobb Baseball Complex and the South Commons Regional Complex. These are the dominant youth baseball and softball facilities in Georgia and are strong competitors to any facility in the region. The East Cobb Baseball Complex is considered one of the best complexes in the country and draws teams from across the country and the South Commons Complex was the host of the 1996 Olympic Softball competitions.

V. DEMAND ANALYSIS

Determining the optimal size and scope for a youth sports complex destination in Charlotte County depends on a number of factors: 1) Existing local and regional programming and their accompanying field needs, 2) The existing supply of sports fields in the local and regional area and 3) The number of fields required to run tournament programming, including state and national level events that are currently hosted by other in-market facilities and at other regional and national facilities.

Optimizing the size and scope of the complex requires striking a balance between these programming choices. The field-types and the number of fields in the complex, with the addition of close-proximity, high quality satellite fields must be able to comfortably accommodate a significant sized tournament while ensuring that there is enough capacity to handle the existing and expected local programming needs in baseball and softball.

Current Use of Land



North Charlotte Regional Park is a 103-acre park located in Port Charlotte, Florida and consists of one (1) full-sized baseball diamond, three (3) youth baseball diamonds, and one (1) youth softball diamond. All five (5) fields are natural grass and are equipped with lights. There are also four (4) full-sized soccer fields with lights and parking on the site, however most of the rest of the park is forest with the exception of three small ponds.

The complex layout is broken in two distinct portion. The first features the five diamonds and the second offers the four soccer fields, each with their own parking. Paved walking paths and a road that weaves through the complex connects the complex. There is ample parking on the outskirts of the fields. Aside from soccer and baseball, there is also a disc golf course in the wooded area of the park that is used by the Professional Disc Golf Association.

As it is currently configured, the facility is not well suited to regularly host major sports tournaments, although can handle smaller tournaments, such as the Snowbird Classic. It does benefit from well-maintained fields, but lacks the sport-specific or visitor amenities that would attract teams from throughout the region. While the size and distribution of fields makes the complex inadequately sized to host large baseball or softball tournament by itself, combined with a first-class tournament complex Murdock Village could become a baseball destination.

It is recommended that the proposed tournament complex, as part of the larger Murdock Village Redevelopment effort, be situated in close proximity to the existing fields at the North Charlotte Regional Park and the Charlotte Sports Park, forming a cohesive baseball environment. This configuration, along with easy access to El Jobean

Road, will create unified sports and entertainment area that requires approximately 40 acres within the Murdock Village CRA.

High School Sports

While not the best indicator of youth participation, school enrollment and the sports programming offered at local schools is a valuable proxy for sports participation in the local market. Charlotte County offers 25 public schools and educational centers with 16,640 students enrolled throughout the district. In addition, there are 11 private schools in Charlotte County serving 1,433 students.

Since Charlotte County itself is relatively small compared to other counties in Florida, it is important to look at surrounding areas. Within Charlotte County there are only three public high schools. Charts 5.1 and 5.2 below show the sports offered by schools in Charlotte County and the schools in their division. This information, while not perfect, provides a good basis for participation in the area.

Table 5.1: Charlotte County and Surrounding Area Boys High School Sports Participation

High School	BaseB	BsktB	FootB	CC	Golf	Soccer	Swim	Tennis	Track	Wrestling	Bowl	V.ball
Charlotte High School	X	X	X	X	X	X	X	X	X	X	C	X
Lemon Bay High School	X	X	X	X	X	X	X	X	X	X		
Port Charlotte High School	X	X	X	X	X	X	X	X	X	X		
North Port High School	X	X	X	X	X	X	X		X	X		
Venice High School	X	X	X	X	X	X	X	X	X	X		
Cape Coral High School	X	X	X	X	X	X	X	X	X	X		X
Sarasota High School	X											
Bishop Verot High School	X	X	X	X	X	X	X	X	X			
Southeast High School	X	X	X	X	X	X	X	X	X	X		
Manatee High School	X	X	X	X	X	X	X	X	X	X		
Desoto County High School	X	X	X	X	X	X		X	X			
Cypress Lake High School	X	X	X	X	X	X	X	X	X	X		
North Fort Myers High School	X	X	X	X	X	X	X	X	X	X		
Ida Baker High School	X	X	X	X	X	X	X	X	X	X	X	
Mariner High School	X	X	X	X	X	X	X	X	X	X	X	
Braden River High School	X	X	X	X	X	X	X	X	X	X		
Lakewood Ranch High School	X	X	X	X	X	X	X	X	X	X		

Table 5.2: Charlotte County and Surrounding Area High School Girls Sports Participation

WOMENS SPORTS	SoftB	BsktB	Cheer	CC	Golf	Soccer	Swim	Tennis	Track	Wrestling	Bowl	V. ball
Charlotte High School	X	X	X	X		X	X	X	X		C	
Lemon Bay High School	X	X	X	X	X	X	X	X	X			X
Port Charlotte High School	X	X	X	X	X	X	X	X	X			X
North Port High School	X	X		X		X	X		X			X
Venice High School	X	X	X	X	X	X	X	X	X			X
Cape Coral High School	X	X	X	X	X	X	X	X	X			X
Sarasota High School	X	X	X	X	X	X	X	X	X			X
Bishop Verot High School	X	X	X	X	X	X	X	X	X			X
Southeast High School	X	X		X	X	X	X	X	X	X		X
Manatee High School	X	X	X	X	X	X	X	X	X			X
Desoto County High School	X	X		X	X	X		X	X			X
Cypress Lake High School	X	X	X	X	X	X	X	X	X			X
North Fort Myers High School	X	X	X	X	X	X	X	X				X
Ida Baker High School	X	X	X	X	X	X	X	X	X		X	X
Mariner High School	X	X	X	X	X	X	X	X	X			X
Braden River High School	X	X	X	X	X	X	X	X	X			X
Lakewood Ranch High School	X	X	X	X	X	X	X	X	X			X

Every one of the schools listed below fields a varsity baseball as well as a JV team. The average high school baseball team has 15-18 players. This indicates a local participant range between 272 (varsity only) and 578 (varsity and JV).

Local Sports

Other than the Charlotte Sports Park, which is used predominantly for the Tampa Bay Rays Spring Training and Charlotte Stone Crabs, there are few local tournament quality venues. North Charlotte Regional Park and South County Regional Park provide some high quality fields, but lack the amenities and size to compete in the Florida youth sports market.

Currently, Charlotte County residents that want to participate in youth baseball and softball tournaments are required to drive south to Fort Myers or north to the Sarasota-Bradenton area. While these areas are within a reasonable driving distance for “day trip” tournaments, a local complex with tournament quality fields and amenities, would attract these participants to stay in Charlotte County. By preventing “leakage,” Charlotte County is able to retain local dollars that are not currently captured by the local economy.

While Charlotte County, and Florida as a whole, has an older population, it benefits from a robust sports tourism industry, especially during the winter months. Family vacations, travel teams escaping the cold, and college and professional showcases make Florida the premier destination for youth baseball and softball. Furthermore, Major and Minor League Spring Training facilities are located throughout the state and are typically open to youth teams except for during the six (6) weeks of MLB Spring Training.

Youth Sports Opportunities in Charlotte County

Outside of school-sponsored athletics, Florida has an abundance of youth sports organizations, including USSSA, Little League; Babe Ruth; Perfect Game; Sunshine Athletics Inc.; and others, all of which provide programming opportunities throughout the state.

Little League

Florida Little League District 9 covers Charlotte County and extends south to Cape Coral and South Fort Myers. Within District 9 there are 13 individual leagues including:

- Cape Coral JR & SR BB
- Cape Coral American
- Cape Coral National
- Port Charlotte National
- Fort Myers American
- Punta Gorda
- Hancock American
- South Fort Myers
- Murdock
- Cape Coral Softball
- Greater Pine Island
- Buckingham
- North Fort Myers National

Little League is the most common type of youth baseball and has the highest participation in most states. Despite being one of the most popular, many of the parks and fields used are low quality and lack unique amenities and features. Florida District 9 fields cover the full spectrum ranging from excellent complexes (e.g. Terry Park and Cape Coral Sports Complex) to poor complexes (e.g. Rutenburg Park and Burton Memorial Park). Games are played at 16 different locations as far south as south Ft. Myers and as far north as Murdock, and the complexes vary drastically in their size and quality.

Table 5.3: Little League Division 9 Field Locations

Name	Location	Baseball Fields	Softball Fields
Bishop Verot High School	Ft. Myers	2	
Buckingham Community park	Ft. Myers	4	
Burton Memorial Field	Cape Coral		4
Cape Coral Sports Complex	Cape Coral	4	
Hancock Park	Cape Coral	4	
Harold Avenue Park	Port Charlotte	3	3
Jason Verdow Field	Cape Coral	3	
Koza-Saldino Park	Cape Coral	4	
North Charlotte Regional Park	Murdock		
North Ft. Myers Community Park	Ft. Myers	4	
Phillips Park	Bokeelia	2	
Rutenburg Park	Ft. Myers	3	
Sam Fleishman Complex	Ft. Myers	3	3
South County Regional Park	Punta Gorda	4	
Stars Complex	Ft. Myers	4	
Terry Park	Ft. Myers	4	

The age of participants range from 5-18 over several different levels. Ripken Design was able to contact 8 of the 14 leagues that make up District 9 Florida Little League. 163 teams of all ages participated in these 8 leagues in 2011. Assuming that teams include 12 players per team, 1,956 players participated in Little League baseball in the district in 2011.

Table 5.4: Little League District 9 League Participation

Little League District 9	T-Ball	Farm	Grapefruit	Minors	A Minors	B Minors	Majors	Juniors	Total
Fort Myers American	5		6	10			7	4	32
N Fort Myers National	3				3	3	3		12
Murdock	2		2	4			2		10
Port Charlotte National*									0
Buckingham*									0
South Fort Myers	8		12	12			8	5	45
Cape Coral National				6			4		10
Greater Pine Island	3			4			3		10
Hancock American*									0
Punta Gorda	9						17		26
Heartland Sports Assc*									0
Cape Coral American	6			6			6		18
Cape Coral Softball*									0
Cape Coral Junior & Senior*									0
Total	36	0	20	42	3	3	50	9	163

*Participation data could not be obtained despite several attempts

District 9 Little League has three leagues within Charlotte County: Murdock, Port Charlotte National, and Punta Gorda. In speaking with Punta Gorda Little League President Jay Oleson, he noted the league had 26 teams for the Spring 2011 season with the expectation of growth to at least 29 teams in 2012. He also mentioned the need for more fields in the area, as the Punta Gorda Little League is growing out of their current facility, South County Regional Complex.

Table 5.5: Charlotte County Little League Participation

Little League District 9	T-Ball	Farm	Grapefruit	Minors	A Minors	B Minors	Majors	Juniors	Total
Murdock	2		2	4			2		10
Port Charlotte National *									0
Punta Gorda	9						17		26

*Participation data could not be obtained despite several attempts

In addition to Little League restrictions, baseball field availability is affected by two other major factors. The first is the business decision made by Parks & Recreation departments throughout the area to develop skinned infields baseball/softball fields instead of grass-infield diamonds that can only be used for baseball. The versatility and lower maintenance costs of this approach allows field use to be maximized across the population. The downside is that skinned infields are a sub-optimal playing surface for baseball, and an area shortage of baseball diamonds combined with a scheduling preference given to local leagues prevents most high-quality baseball competitions from being held in the area. The

following table shows the three (3) baseball complex's available hours in Charlotte County.

Table 5.6: Field Supply Hours

Location	Fields	Day Hours	Night Hours
Harold Avenue Complex	7	245	105
North Charlotte Regional Park	5	175	75
South County Regional Park	10	350	150
Total	22	770	330

Supply calculations make the following assumptions:

- Fields are available, without lights from 4-7pm each weekday
- Fields are available from 9am-7pm on Saturday and Sunday
- Fields with lights are available from 7-9:30pm Monday-Saturday

Youth Sports Organizations in Florida

Babe Ruth Baseball

The Babe Ruth Baseball League is one of the largest youth baseball organizations in the country, serving approximately 952,602 players nationwide. Within Florida, there are 47,653 players, one of the largest single state presences the organization has in the country. Babe Ruth Baseball league has two main divisions: Cal Ripken Baseball and Babe Ruth Baseball. Cal Ripken Baseball features age groups under the age of 12. Babe Ruth Baseball is strictly for players 13 and older.

By far the strongest presence in Florida is Cal Ripken Baseball, with approximately 2,106 teams and 39,990 players across the state. Those figures drop off severely with only 357 teams between 13-15 years old and only 44 teams between 16-18 years old. In 2011 there were 28 tournaments held in Florida, although none of the Babe Ruth World Series games were held in Florida. They did however, host four regional invitational, held in Sarasota and Longwood.

Table 5.7: 2009 Babe Ruth Florida Participation

Division	Number of Teams	Estimated Number of Players
Cal Ripken	2,106 (372 Leagues)	39,990
13-15 Year Olds	357 (100 Leagues)	6,783
16-18 Year Olds	44 (18 Leagues)	880
Total	2,507	47,653

USSSA

The United States Specialty Sports Association (USSSA) is a national organization with the purpose of sponsoring regional baseball and softball tournaments and leagues. USSSA draws from independent travel teams and is divided into four playing levels (A, AA, AAA, Majors) within each age group. Age groups range from as young as 4 years old to 18. For younger age groups there are the options of coach-pitch, machine-pitch, and kid-pitch. Tournaments are held throughout the year and the better a team performs, the more points they accrue.

USSSA has a dominant presence in Florida, especially southern Florida. Due to the number of teams, tournaments, and complexes in the state, USSSA divides the state in two divisions: Florida North and Florida South. In 2011, there were 258 teams registered in the Florida North division across ages 7-18. USSSA’s presence is even more pronounced in southern Florida where 1,324 teams registered with the organization.

USSSA lists its tournaments and events individually by age group. Florida North was scheduled to hold 229 events in 2011. Florida South listed 719 events over the course of 2011. Numerous different complexes of various shapes and sizes hosted USSSA tournaments in 2011.

Table 5.8: USSSA Registered Florida Teams

USSSA Florida Teams					
Age	Major	AAA	AA	A	Total
18 & Under	64	8	7	9	88
17 & Under	19	1		2	22
16 & Under	73	20	7		100
15 & Under	5	9		6	20
14 & Under	56	62	38		156
13 & Under	75	88	61		224
12 & Under	66	80	100	7	253
11 & Under	38	92	80		210
10 & Under	50	56	86	9	201
9 & Under	101		33		134
8 & Under	65				65
7 & Under	1				1
	Coach Pitch	AAA	C.P. AA	C.P. A	Machine Pitch
8 & Under	34	19		24	77
7 & Under	25		1		26
Total Teams					1,577
Total Est Players					18,924

Perfect Game

Perfect Game is an independent organization that hosts tournaments across the country with the main focus of helping players develop and gain recognition from college and professional scouts. Perfect Game achieves this by hosting both tournaments and individual player showcases across the country.

Perfect Game has a more focused goal than other tournament organizers and they hold fewer events than USSSA. However, they are the leaders in the professional development and scouting facet of the industry. Their influence is most prevalent in Arizona, Florida, and Georgia. Regionally, Perfect Game has an established presence in Fort Myers, FL and East Cobb, GA.

Unlike USSSA or Nations Baseball, Perfect Game does not seek to fill as many slots in as many tournaments as possible. Rather, they cater to the elite travel teams and the best youth players from around the country. Although Perfect Game's influence is fairly specific, Fort Myers' spatial relation to Port Charlotte make them a constant competitor.

Team One Baseball

Team One Baseball is the showcase and tournament division of Baseball Factory, a major scouting service in the country. As such, the purpose of Team One Baseball events is very similar to that of Perfect Game. The targets for Team One Baseball are elite level players and teams with the goal of being noticed and recognized by college and professional scouts. Their goal is not to put on a family vacation environment but instead to retain the highest quality participants.

Team One is most prevalent in Arizona, California, and Florida. Although there are some events held outside of these states, the vast majority are held there. Each year there is a showcase in each region across the country. In addition to these player showcases, there were ten (10) Team One tournaments scheduled in 2011. The two (2) locations used for these events were Roger Dean Sports Complex in Jupiter, FL and Raymond Naimoli Baseball Complex in St. Petersburg, FL.

While Team One Baseball attracts the best players and elite travel teams, they strive to gain exposure for players, but not necessarily to provide an experiential event. Their presence in relation to Port Charlotte is of note but in general they will be drawing from a different market—one that competes more directly with Perfect Game.

Nations Baseball

Nations Baseball is another national tournament organizer with a significant presence in Florida. The organization hosts both youth tournaments and youth leagues. Its influence is heaviest in the northern Florida and the panhandle although it does hold some tournaments in southern Florida.

Nations Baseball is very similar to USSSA in structure in that teams register with the organization and then earn points for each tournament they play in and how well they perform. Depending on the amount of points and success of a team they have the ability to play in local, regional, state, and national tournaments over the course of the year. Most of the tournaments hosted by Nations Baseball are weekend tournaments and tend to cost slightly less than USSSA events.

In 2011, 100 teams across all age groups registered with Nations Baseball in the state of Florida. It is important to note that some teams registered with USSSA may also register with Nations Baseball. Again, assuming 12 player rosters, approximately 1,200 players participated in Nations-Baseball tournaments in Florida.

PONY Baseball

PONY (Protect Our Nation's Youth) baseball and softball is a large youth sports organization with local competitions leading up to a national tournament. There are seven leagues within PONY Baseball: Shetland League (ages 5-6), Pinto League (ages 7-8), Mustang (9-10), Bronco (11-12), PONY (13-14), Colt (15-16), and Palomino (17-18). Geographically, PONY Baseball is broken up into regions and then divided into divisions within the region. Florida is located in the Southeast division of the South Region. Pony baseball has five offices in Miami, Tampa, Jacksonville, Orlando, and Pensacola.

There were ten regional tournaments held in Florida across all age groups, but Florida complexes hosted no events associated with the National tournament. While PONY baseball does have a moderate presence in the state but nowhere near that of other organizations. Travel teams and leagues seem to have much more influence in the state and Little League is clearly preferred locally to PONY.

Sunshine Athletics, Inc.

Following his professional career, former Major League player Chet Lemon started in Sunshine Athletics, Inc. in 1993. Concentrated primarily between the Tampa-St. Petersburg area and Lakeland, Sunshine Athletics hosts youth baseball, basketball, and volleyball tournaments and leagues. Youth baseball is the strongest aspect of the organization

Tournaments and leagues are available for age groups ranging from 8U through high school. In 2007 Sunshine Athletics estimated that 13,000 players had participated in at least one event statewide.

Despite not being active in softball programming, 101 baseball teams are currently registered with Sunshine Athletics. The fall tournaments schedule includes seven tournaments between August and December in addition to the Sunshine Baseball Fall

League. Prices for tournaments range from \$345 to \$375 and there is a \$100 entrance fee for the Fall League.

ASA Softball

The Amateur Softball Association is a non-profit organization that is the leader in youth softball in the country. Established in 1933, ASA is the National Governing Body of Softball in the United States. No other organization hosts more tournaments and showcases than ASA. Women's fastpitch softball is the strongest arm of the organization although they do host fastpitch and slowpitch events for adults as well.

It is estimated that there are 250 elite softball teams across the state of Florida¹⁴. Certainly this does not account for a large portion of recreation teams but provides good perspective for the softball presence in the state. As with baseball, Florida is a destination for youth softball teams from around the country. It is also important to note the areas in the state where softball is strongest. Most notably are the Tampa-St. Petersburg area, Orlando, and Jacksonville. There are teams in many other towns and cities throughout Florida but these three particular cities have a concentration of youth softball teams.

In 2011, thirty-one tournaments were held across the state of Florida. In addition to local tournaments, larger national tournaments and showcases are held throughout the year.

NSA Softball

The National Softball Association (NSA) is an independent organization, similar to ASA. Created in 1982 in Lexington, Kentucky, the NSA offers tournaments that are open to all levels and ages. Although the ASA is the dominant softball tournament provider, the NSA does offer tournaments and events throughout the country, including a presence in Florida.

There does not appear to be one location dominated by NSA but they do hold various tournaments over the course of the year. Similar to USSSA, NSA lists their tournaments by each age group, which provides a somewhat misleading figure. Between the ages of 6-18, NSA lists 2,038 tournaments for 2011 across all levels of play. Nonetheless, NSA certainly has a strong presence in the state in competition with ASA.

Independent Travel Teams

In addition to the various tournament organizations and leagues throughout Florida, locally organized travel teams make up a significant portion of participation. There are six independent travel teams in the immediate area surrounding Port Charlotte: Florida Curve, Port Charlotte, Charlotte Stingrays, North Port Bulldogs, Charlotte Storm, and Venice Owls. These teams are generally locally organized and by age group. There are at least 14 other independent teams in surrounding counties.

¹⁴ Fastpitch Florida <http://fastpitchflorida.com/teams.html>

VI. COMPARABLE FACILITIES

Florida is a unique youth baseball market because of the presence of three distinct potential user pools: local, out-of-state, and spring training. Despite the existence of these groups, in many ways they are mutually exclusive. Florida has a huge local player pool, tourist destinations throughout the state, and established Major League Spring Training facilities. However, many local teams are not enticed by tourist attractions such as Disney World or beautiful beaches, but these attractions are essential for out of market teams. In many cases, this means a complex must choose which market to target. Furthermore, the presence first-class major league facilities have created a large supply of 90' fields in Florida. However, outside of Spring Training, there is a limited youth market for 90' fields and the fields are empty for long periods of time.

Based on the assessment of local and regional market conditions from previous chapters, Ripken Design has identified selected sports complexes from throughout the United States that are useful for performing a comparative analysis. While the new complex in Port Charlotte may not be the same size or include the same amenities as these complexes, these comparables serve an important function:

- They serve as examples of facilities that host major regional and national tournaments in one or more sports
- They have high-quality fields and amenities
- They serve as market comparables (see *Market Analysis* chapter) that are useful for gauging the probability of success in Charlotte County
- They set an industry baseline for field size, distribution, amenities, and layout
- Use a successful operating model

With this in mind, the following complexes provide reasonable comparables for one or more of those factors. Complexes selected focus primarily on baseball, as they have established themselves as dominant baseball venues.

Comparable Tournament Complexes

Tournament Complexes are those that typically host weekend and three day tournaments, as well as some camps and league play. These complexes typically draw from an area within 400 miles as shown in the *Market Analysis* section. Teams from within this driving radius will make up the vast majority of teams that visit the complex. The most important attractions for in-state visitors are exceptional field quality, unique features, and amenities. The following complexes are among the most successful tournament complexes in the country.

Ripken Experience-Maryland (Aberdeen, MD)

The Ripken Experience-Maryland currently includes seven (7) fields developed on 40 acres for approximately \$10 million. The youth fields at the Ripken Experience-Maryland

are scaled down replicas of famous Major League stadiums including Camden Yards, Fenway Park, Memorial Stadium, and Wrigley Field. In 2009, a full-size replica of Yankee Stadium, with synthetic turf was added. In 2010, turf infields and new fences were built to convert four (4) generic fields in to replicas of Citizens Bank Park in Philadelphia, PA and National's Park in Washington D.C. because Aberdeen is the geographic midpoint between the two. In 2011, Cal Sr.'s Yard was converted to synthetic turf as well. The



playing fields are of the same quality of Major League fields.

The complex hosted 28 tournaments in 2011, 26 of which were two-day events. One (1) four-day tournament and one (1) weeklong tournament were also held at the complex. In total the Ripken Experience-Maryland attracted over 1,300 teams in 2011. In addition, the Academy boasts the Ripken Training Circle, a patented circular regulation-sized training infield with a synthetic grass surface, and a hitting area containing covered batting cages and a tee/soft-toss area.

Beginning in 2003, the complex became the permanent home of the Cal Ripken World Series. The World Series was played in a retrofitted Ripken Stadium in 2003 and 2004. Cal Sr.'s Yard, the Academy's signature field, became the permanent home field for the World Series in 2005. Cal Sr.'s Yard is a scale replica of Camden Yards, complete with Eutaw Street and a replica Warehouse, home to a Courtyard Marriot and Residence Inn. The Courtyard Marriott offers 114 rooms, 6 suites and 3 meeting rooms. The Residence Inn features 78 suites throughout the 7-floor hotel.

Two-day tournaments at Ripken Academy average \$770 to players on teams aged while a one-month fall league for players aged 13-14 is approximately \$2000. Summer Camps in Aberdeen cost \$840 on average.

Old Settlers Park (Round Rock, TX)

Round Rock, Texas, the self proclaimed “sports capital of Texas” is home of an enormous outdoor baseball/softball facility that serves as a tournament destination as well as multi-sport game and practice space for local residents. At 570 acres, Old Settlers Park is the cornerstone of the Round Rock park system and offers fields and amenities for all visitors of all types. In addition to 3 miles of trails and multiple picnic, concession and restroom areas, the park has the following athletic features:

- 20 baseball fields (16 lighted)
- 5 lighted softball fields
- 5 Lighted Adult Softball Fields
- 2 Lighted Football Fields
- 5 Regulation Size Soccer Fields (1 lighted)
- 2 Regulation Youth Soccer Fields
- 12 Half-size Soccer Fields
- 12 Lighted Tennis Courts



This complex has been a keystone of Round Rock’s “Sports Capital of Texas” marketing campaign and has hosted major baseball tournaments throughout the year. There were 38 USSSA “events” scheduled at the complex in 2011 with approximately 197 teams visiting the park for these events. In 2007, the

Round Rock City Council approved the issuance of \$12.5 million in certificates of obligation to help fund significant improvements to the park. The \$18.2 million renovations included major renovations to the existing baseball fields and the construction of a new five-field softball complex.

Adding to the attraction of Old Settlers Park is the presence of Dell Diamond, the home of AAA Round Rock Express. Although the minor league baseball stadium is not used for youth tournaments, the high level Houston Astros affiliate provides entertainment value for teams that travel to Round Rock from out of town. The Round Rock Express supplements the complex by offering teams additional activities during the evenings.

Similarly, families and players that attend Round Rock Express games are exposed to the fine facilities located in the park and may be interested in returning to play in a baseball tournament.

Cypress Mounds (Baton Rouge, LA)

Cypress Mounds opened in 2008 to rave reviews, as the complex quickly became one of the premier tournament destinations in the South. With a custom design master plan and unique field dimensions by Ripken Design, playing conditions on the Bermuda grass fields at Cypress Mounds are the best in the area. The complex serves as a regional hub for USSSA, hosting some of Louisiana's top tournaments, in addition to providing extensive league programming for the local community. The patented Ripken Training Circle, Musco Lighting, and scores of family friendly amenities make Cypress Mounds a complex that the entire family can enjoy.

Fields & Amenities:

- Six (6) lighted, irrigated baseball fields
 - o (3) 60'/70'
 - o (3) 80'/90'
- Reverse Fenway Park (Yawnef)
- Signature Field
- Covered Batting Cages
- Ripken Training Circle
- Adjacent Indoor Training Facility
- Playground
- Entrance Building with Pro Shop
- Two-story clubhouse with full service restaurant and wrap around deck
- Video Arcade



Each field at the Cypress Mounds complex is uniquely designed to offer a one of a kind experience to every visitor. The most notable field at the complex is “Yawnef Field” which is a scaled down replica of Fenway Park, but in reverse. The Green Monster looms in Right Field with the famous Pesky Pole just 200’ don’t the left field line. Another signature field at Cypress Mounds is the “Wings Field” which combines aspects of Wrigley Field and The Polo Grounds to form a unique take on the two historic ballparks.

Cypress Mounds hosts 2 day, 3 day, and 4 day tournaments. The facility also hosts tournaments through USSSA and Global Sports Baseball, including the annual USSSA World Series for 9AA and 14AA age groups. Aside from tournaments, Cypress Mounds offers youth and adult leagues and clinics throughout the year. Cypress Mounds is privately owned and operated, attracting teams from across the region. Tournaments range in price based on age group and length of the event.

Table 6.1: Cypress Mounds Tournament Prices

Length of Tournament	Number of Tournaments	Price		
		4-6	7-8	9-14
1-Day	1	\$50	\$150	\$325
2-Day	13	\$75	\$150	\$375
3-Day	1	\$100	\$225	\$450
4-Day	1	\$150	\$275	\$625

East Cobb Baseball Complex (Marietta, GA)

The East Cobb Baseball Complex is an excellent baseball and softball facility located north of Atlanta in Marietta, GA. The park features eight (8) baseball fields, four (4) with traditional grass infields and four (4) with skinned dirt infields. All of the fields are natural grass, enclosed, and equipped with full lighting. East Cobb Baseball Complex is owned and operated by ECB, Inc. a non-profit 501(c)(3).



The complex has been maintained in excellent condition and offers various amenities. It has indoor and outdoor batting cages, meeting rooms, and covered dugouts.

USSSA, Perfect Game, and East Cobb Baseball use the facility for events. For example, the complex is scheduled to host the Annual ECB Halloween Wood Bat Invitational in October. The tournament is open to ages 9-18 and the team entry fee ranges from \$490-\$620.

The East Cobb Baseball Complex is considered one of the top baseball complexes in the country. The facility has attracted teams from all over the country and has become a destination for all age groups, especially high school athletes with aspirations of college or professional baseball.

Table 6.2: Comparable Tournament Facilities

Name	Location	MSA Center	MSA Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Ripken Experience-Maryland	Aberdeen, MD	Baltimore	2,727,684	22.90%	\$73,038	\$92,412
Cypress Mounds	Baton Rouge, LA	Baton Rouge	802,484	24.70%	\$53,249	\$69,384
East Cobb Baseball Complex	Marietta, GA	Atlanta	5,268,860	26.60%	\$65,207	\$77,996
Old Settlers Park	Round Rock, TX	Austin	1,716,289	25.30%	\$66,285	\$83,589
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176

While Charlotte County does not perform very well against other local markets, it is important to remember that the Punta Gorda MSA is significantly smaller than the other MSAs included in Table 6.2.

Comparable Destination Complexes

Having examined successful tournament complexes, it is also important to compare Port Charlotte with comparable destination complexes. These facilities attract primarily from regional and national markets. Where tournament complexes primarily draw from the local market, the local market is not the target market for destination complexes. Tourist attractions, lodging, and family friendly amenities are critical to the success of a destination complex.

Cooperstown Dreams Park (Cooperstown, NY)

Cooperstown Dream Park is located in Cooperstown, NY, home of the Baseball Hall of Fame. The complex welcomes over 500,000 visitors and 13,000 players annually and focuses on tournaments for youth baseball players 12 years old and under.

The complex includes 22 lighted, enclosed youth stadium and over 60 bunkhouses where the players stay throughout the week of competition. The complex runs 11 weeklong baseball tournaments each summer for teams in the 12 and under age category and one tournament in the 10 and under age category. 96 teams participate in each weeklong tournament, allowing a total of 1,152 teams to play at Cooperstown Dream Parks per season. Independent travel teams and sanctioned teams in the 12 and under age category travel to Cooperstown Dream Park for events. All players, coaches and umpires stay in the baseball village for six nights and seven days. Parents, other family members and friends that accompany the teams stay in local area hotels. Teams are guaranteed eight games (weather permitting) throughout the week. With the addition of Cooperstown Dreams

Park, Cooperstown, NY has become the ultimate destination for baseball fans, with the National Baseball Hall of Fame and the American Youth Baseball Hall of Fame.



The initial phase of Cooperstown Dreams Park, which included six fields with lights, 25 bunkhouses for players and a dining hall, cost over \$10 million. Large corporate sponsors in this phase included corporate sponsors including Hershey, Pepsi, Kodak, and Rawlings. While the park continues to remain extremely popular for its high levels of competition and overall tournament experience, the complex lacks many of the player and fan amenities that newer complexes have introduced. By completely enclosing each field and constructing each one with the same dimensions, the complex does not offer a unique or varied playing experience for players and offers sub-optimal viewing condition for families and fans. Additionally, by completely enclosing the fields are obstructed from passer-by and families/fans that may wander the complex to find their particular team.

While the complex continues to enjoy great success, newer complexes that deviate from the full-enclosure model have begun to attract teams seeking a unique playing experience with more fan and player-friendly amenities. Cooperstown Dreams Park costs \$745 per player for a weeklong stay at the facility.

Ripken Experience (Myrtle Beach, SC)

The Ripken Experience - Myrtle Beach opened its doors in June 2006. Phase One of the complex consists of seven (7) fields - 2 regulation-sized diamonds, and 5 youth diamonds. The fields are designed after historic ballparks from baseball history and include: Griffith Field, Navin Field and The Polo Grounds. The seven (7) fields at the Ripken Experience Myrtle Beach are not typical youth baseball fields. All fields are constructed with a synthetic turf infield and outfield. Many professional and collegiate teams have begun to use the popular synthetic playing surface. Turf allows for consistent play, elimination of rainouts and the reduction of the risk for injuries from bad bounce and uneven surfaces.



The Ripken Experience offers weeklong tournaments for ages 10U-16U. Summer tournaments include:

- Six-game minimum
- Teams stay at the Myrtlewood Villas Luxury Condominiums
- All Access Pass for each team member with unlimited access to mini-golf, water parks, Par 3 courses, and NASCAR Speed Park.
- Special Gifts for each player and coach

In addition to summer tournaments, The Ripken Experience-Myrtle Beach offers Spring Break packages for High School and College Baseball and Softball teams. These packages are available in February, March, and April.

ESPN Wide World of Sports Complex (Kissimmee, FL)

The ESPN Wide World of Sports Complex is located just outside of Orlando in Kissimmee, FL as part of the Walt Disney World Complex. The multi-sport facility features something for everybody. Facilities include:

- Nine (9) baseball fields
- Six (6) diamonds with skinned infields
- Eight (8) traditional sport fields, with the ability to increase to 12
- Tennis center
- Track and field complex
- Indoor arena

The ESPN complex, located less than a mile from Walt Disney World, hosts over 200 events a year for various sports and age groups. The complex has also hosted NCAA

events, most notably the annual Old Spice Classic, a basketball tournament featuring eight Division I Men's Basketball teams over Thanksgiving weekend.

Simply considering baseball, the ESPN complex is a dominant destination venue for youth



baseball in Florida, although Disney does not self-operate all of its tournaments. Through USSSA in 2011, the facility hosts 23 events with approximately 364 teams visiting the complex. For example, the ESPN Elite Super NIT, scheduled for November 25th, 2011, is open to nine age groups and levels, with 78 teams registered. The entrance fee for the event is \$495 for all age groups. The facility also hosts its own tournaments and events. For instance, during February and March they offer packages for teams to come for a Spring Training experience. More than 160 teams from across the country signed up for the Spring Training package. The complex is also home to the Atlanta Braves Spring Training, an important factor adding to the multitude of family attractions in the local area.

Cocoa Expo Sports Complex (Cocoa, FL)

The Cocoa Expo Sports Center in Cocoa, FL is a recently renovated, state of the art baseball facility. Originally built for Major League Spring Training, the complex deteriorated over the past decade, prompting major renovations in 2011. The facility now features ten (10) baseball fields, two (2) youth softball fields, and an indoor baseball facility. Three of the baseball fields are youth fields with 220' fences.



Cocoa Expo Stadium is the championship field and the centerpiece of the complex. The 5,500-seat stadium is equipped with a new sound system, press box, 30' video scoreboard, and a pro shop. On one side of the stadium will be a pinwheel quadraplex with baseball fields and two additional stand alone fields. On the other side of the stadium will be a pinwheel with the five youth baseball and softball diamonds.

Construction on the complex began in the summer of 2011 and is expected to be finish in time for the 2012 season. Programming at the complex includes instructional camps for all ages, fall, winter, and spring leagues, weekend tournaments, national invitational tournaments, and spring training for high school and college teams. Currently the schedule for the complex is unavailable.

Table 6.3: Comparable Destination Complexes

Name	Location	MSA Center	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Ripken Experience-Myrtle Beach	Myrtle Beach, SC	Myrtle Beach	269,291	20.10%	\$49,218	\$61,906
Cooperstown Dreams Park	Milford, NY	Oneonta	62,259	18.90%	\$49,964	\$65,035
ESPN Wide World of Sports	Kissimmee, FL	Orlando	2,134,411	23.10%	\$57,304	\$68,045
Cocoa Expo Sports Complex	Cocoa, FL	Melbourne	543,376	19.80%	\$56,321	\$70,203
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176

Charlotte County performs well when compared with the most successful destination complexes in the country, although it is worth noting that three of the competitive “destination” facilities are located within the regional market that a new facility in Port Charlotte hopes to enter. The most important aspect of this information is that destination complexes are not dependent on their local market. Despite not having a large local potential user pool, Ripken Experience-Myrtle Beach, Cooperstown Dreams Park, and Cocoa Expo Sports Complex have been successful complexes.

Comparable Spring Training Facilities

Many of the best complexes in Florida are also home to Major League Spring Training. 15 teams have their spring facilities in Florida and participate in the Grapefruit League, the other 15 teams participating in the Cactus League in Arizona. While half of the MLB teams have their Spring Training in Florida, many of these facilities are not active in hosting youth tournaments. The complexes selected for comparison maintain excellent facilities, host Major League Spring Training and Minor League teams, and hold youth tournaments. For the best comparison, three of the complexes selected for comparison are located in Arizona.

Lee County Sports Complex (Fort Myers, FL)

The Lee County Sports Complex in Fort Myers, FL is a large baseball and softball complex and the home of the Minnesota Twins Spring Training and the Fort Myers Miracle Minor League team. The complex consists of nine (9) full-size baseball diamonds, five (5) with grass infields and four (4) with skinned dirt infields. There are also two practice infields. The complex is located adjacent to South Fort Myers High School.

Hammond Stadium is the main field, used for Spring Training and Minor League games. Behind the stadium are the baseball fields and practice infields. Across the parking lot is the quad of skinned diamonds. All of the fields are natural grass and are major league quality. Hammond Stadium and the four softball fields are equipped with lights.

When the Twins and Miracle are not using the complex, the facilities are available for youth baseball tournaments. The most frequent user of the complex is Perfect Game, which holds a numerous tournaments in the Fort Myers area. When Perfect Game holds events in the area they use various complexes, often including the Lee County Sports Complex. The complex is scheduled to host six Perfect Game sponsored tournaments in 2011.

Roger Dean Sports Complex (Jupiter, FL)

The Roger Dean Complex in Jupiter, FL is the Spring Training home of the St. Louis Cardinals and Florida Marlins, as well as the regular season home for the Jupiter Hammerheads and Palm Beach Cardinals. The \$28 million complex opened in 1998 and sits on 110 acres just off of I-95. The complex includes twelve (12) full size baseball fields and two (2) practice infields. Four (4) of those fields are equipped with full lighting.

The complex hosts two of the largest high school baseball tournaments; the USA Baseball Junior Olympic Tournaments and the Baseball America/Perfect Game Baseball Wood Bat



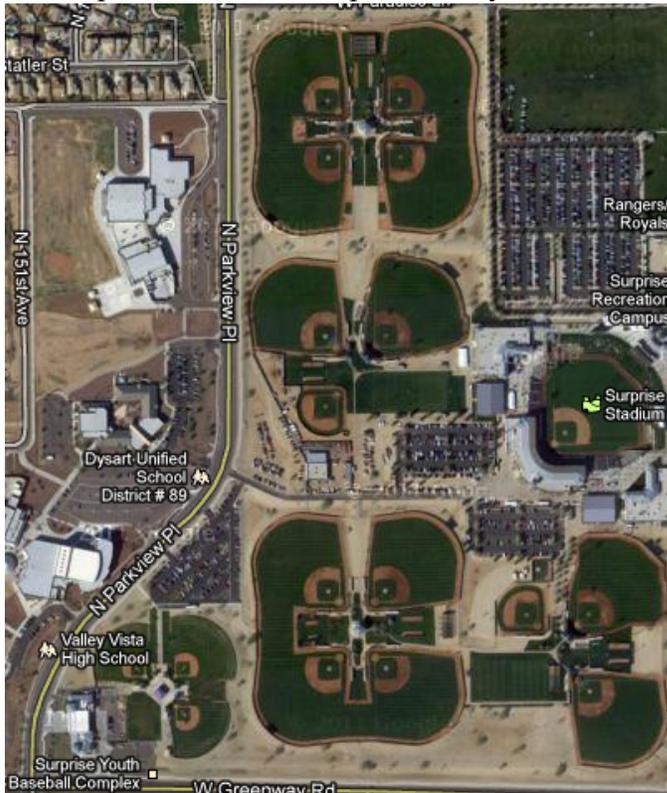
Championship. In addition to baseball, the complex can be rented out to host company events, meetings, fund-raisers, graduation ceremonies, or private functions.

Surprise Baseball Complex (Surprise, AZ)

The Surprise Baseball Complex is the Spring Training Home of the Kansas City Royals and the Texas Rangers. In addition to the main stadium field there is the Surprise Recreation Campus which features twelve (12) full size baseball fields, three (3) youth-sized fields, and two (2) practice infields. There are also two (2) soccer fields, one of which is lighted. Six of the full-size baseball fields are lighted and the three (3) smaller fields are lighted. The complex is located just 45 minutes outside of downtown Phoenix and opened in 2003.

The complex is the host to the Rangers and Royals in the spring and is also the home field of the Surprise Rafters of the Arizona Fall League. Outside of their professional tenants, the Surprise Baseball Complex hosts youth tournaments throughout the year. An example

is the USSSA Monsoon Madness, which takes place in mid-July for ages 9-12. There is a three game guarantee for an entrance fee of \$450.



Peoria Sports Complex (Peoria, AZ)

The Peoria Sports Complex is the Spring Training home for the Seattle Mariners and San Diego Padres. The facility consists of the main stadium field, as well as, twelve (12) full-size baseball fields and four (4) practice infields.



Additional amenities at the complex include eight (8) covered hitting tunnels and thirty (30) practice mounds. There are two (2) team clubhouses with fitness and training facilities and over 400 lockers. There is extensive parking available with a capacity of 2,800.

The Peoria Sports Complex hosts various youth baseball tournaments in addition to their Major League Spring Training and Minor League commitments. Among these tournaments are the High School Baseball Tournament (hosted by Arizona Interscholastic Association), Fall Classic Baseball Tournaments, Summer Classic Baseball Championships, the Evoshield National Championship, the Under Armour Southwest Wood Bat Tournament, and USSSA tournaments. Additionally, the complex is the host for the USA Baseball 16U & 14U West Championships.

Salt River Fields at Talking Stick (Scottsdale, AZ)

The Salt River Fields in Scottsdale, AZ are the Spring Training home for the Colorado Rockies and the Arizona Diamondbacks. Outside of the main stadium, there are twelve (12) full-size fields and four (4) practice infields. The complex also offers outdoor and covered batting cages, warm-up areas, stadium offices, and team shops.



The fields are in excellent condition and perfectly manicured. The stadium field can hold several thousand spectators and the entire complex is located adjacent to the Talking Stick Resort and Casino Arizona at Talking Stick. The Talking Stick Resort offers a full range of attractions for the whole family, including:

- 36 Hole Golf Course
- World Class Spa
- Two Pools
- 5 Restaurants
- Full Business Center

The attractions of the Talking Stick Resort add value to the baseball complex by making it a destination for family vacations as opposed to just a Spring Training Venue. Furthermore, the baseball complex and resort sit just 35 minutes outside of downtown Phoenix.

In addition to the Major League Spring Training for the Diamondbacks and Rockies, the Salt River Fields at Talking Stick host youth tournaments and concerts throughout the year. This year the complex is hosting baseball, soccer, and lacrosse tournaments at the youth and adult level. For example, The Junior RBI (Reviving Baseball in Inner Cities) Classic, a four-day event for 11-12 year olds, was held at the complex. The complex also hosted several events associated with the 2011 MLB All-Star game, held in nearby Phoenix.

Table 6.4: Comparable Spring Training Complexes

Name	Location	MSA Center	Population	% Under 18	Med. Hhld. Inc.	Med. Fam. Inc.
Lee County Sports Complex	Fort Myers, FL	Fort Myers	618,754	19.50%	\$59,270	\$70,486
Roger Dean Sports Complex	Jupiter, FL	Port St. Lucie	424,107	20.70%	\$55,981	\$67,841
Surprise Baseball Complex	Surprise, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Peoria Sports Complex	Peoria, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Salt River Fields	Scottsdale, AZ	Phoenix	4,192,887	26.40%	\$63,151	\$74,957
Charlotte County	Port Charlotte, FL	Punta Gorda	159,978	14.30%	\$50,806	\$62,176

Charlotte County does not perform particularly well in the local market with these complexes. While Charlotte County ranks last in every category here, the comparison is skewed due to the size of the Phoenix MSA. When the sites are compared in larger markets, as seen in the *Drive Time Analysis*, Charlotte County performs very well.

Summary

The presence of a large in-state potential user pool, thriving destination market, and established Major League Spring Training facilities make Florida a unique baseball market. As such, it is important to compare Charlotte County with successful complexes in each distinct market segment. Charlotte County performs well statistically with comparative tournament complexes, where the local market is critical to the success of a complex. While it does not compare favorably with the local markets of the selected destination complexes, it is important to remember that the local market is the least important market for destination facilities. Finally, the comparison with Spring Training facilities highlights the importance of the Spring Training market as well as the significance of providing multiple field sizes to attract a wide array of users.

VII. CONSTRUCTION & FINANCING RECOMMENDATIONS

This goal of this section is to provide a baseline expectation of the potential cost of the proposed youth baseball complex. The construction costs are broken down in four (4) groups: Playing Fields, Training Areas, Hardscape, and Buildings & Amenities. The cost estimates included in this section are based on recent construction performed by Ripken Design, or industry averages and drawn from similar completed projects.

Six (6) Youth Baseball Fields

Ripken Design recommends a six (6)-field youth baseball complex, with the potential to build an additional 2-4 fields in the future. The facility should feature youth fields with convertible 60'/70' adjustable basepaths. In general, the fields will have 200-225' fences down the foul lines and 225'-250' fences to centerfield. While the dimensions will be roughly the same, each field will have a unique design as part of a comprehensive complex theme (i.e. scaled down Major League parks or historic parks). When combined with the 90' fields at the Charlotte Sports Park, this allows for even more flexibility in tournaments programming, as all age groups will be able to participate at a given time.

In addition to the fields themselves, some supplemental parking, common space, and a concessions/restrooms building should be constructed. Fields should be built with covered dugouts, fencing, viewing areas, and high-quality backdrops. It will be necessary to move and supplement existing light poles depending on the complex layout.

Dugouts

Each field in the complex should have covered dugouts. A split block design will provide a simple but professional feel for teams.

Backstop and Knee Wall

The recommended height of the backstop is 24 feet with a five-foot overhang extending from the edge of home plate to the first and third base dugouts. A 4' high brick knee wall is also suggested.

Seating

Permanent seating is not an immediate concern. The fields should be laid out so that there are natural berm seating areas, if possible. Ripken Design recommends installing permanent seating or even temporary bleachers at a later date. The seating areas must be handicapped accessible and meet local, state, and federal codes. Temporary solutions

include adding shade options over concrete pads or grass areas, where spectators can sit in their own chairs or on the ground while avoiding the hot sun.

Scoreboards

It is recommended that each youth field have a scoreboard. To save on costs, the scoreboard can be a manually operated scoreboard that clearly displays the score and inning. A scoreboard that displays balls, strikes, hits and errors is optional.

Press Box Areas

Ripken Design recommends that initially, a small press area, with enough room for minimum personnel (i.e. announcer, scorekeeper, and scoreboard operator) and equipment (public address system) be built with direct views behind the appointed championship field. This designated field can be host to tournament championship games, All-Star games and the like. The other fields can have less formal press areas, such as space for a scorer's table, as a public address system and announce is not necessary at these fields.

Surface and Drainage

A packet including the specs on field turf synthetic grass will be provided by Ripken Design upon request. The home plate and pitcher's mound areas should have a recommended soil mix of 40% clay, 50% sand, and 10% silt.

Field Orientation

Optimal field orientation is to locate home player so that the pitcher is throwing across the sun so the batter is not facing, or looking into the sun. As a result, the line from home plate through the pitcher's mound and second base should run east to northeast. Field orientation may change based on land and boundary constraints.

Warning Track

For all fields, a warning track of at least three running steps (approximately 10 feet) should be planned along the perimeter of the field for safety reasons. The change in surfaces will warn the fielder he is approaching the fence and is a necessary safety feature for the ballpark. The warning track shall be installed to a minimum depth of 4 to 5 inches over a geotextile blanket on the sand base. Warning track material should be 3/8" or less in size and have the ability to compact by rolling. Crushed red brick is suggested.

Foul Poles

Foul poles should be at least six feet above the outfield fence.

Batter's Eye

A batter's eye should be placed in dead centerfield, approximately 24 feet wide. Ripken Design recommends that this structure be painted or colored dark green or black. Promats provides a basic windscreen that can be attached to chain link fencing as a basic solution for the batter's eye. A full windscreen and fence capping on outfield walls leads to a much more professional look to any field. This will provide a field of contrast for the white ball, allowing hitters to better see pitched balls.

Pitcher's Eye

A pitcher's eye of six to eight feet tall behind home plate, and painted or collared green or black, will allow fielders to pick up the ball coming off of the bat. In addition to aiding the fielders, this wall will help avoid pitchers becoming distracted by people behind the backstop fence.

Additional Recommended Safety Features

- A roof and protective screening in front of both dugouts should be installed to reduce the risk of injuries to players and coaches from foul balls;
- Overhead and side screens should be placed on the backstop to protect spectators from being hit by foul balls.
- The outfield fence should have protective padding to protect players from injuries that could occur if they run into the fence; and,
- Enclose the top rail of the chain link fencing with PVC drainage tile or a similar product and install fence caps to reduce the risk of abrasions by players and spectators.

Field Material Recommendation

Ripken Design recommends construction of the fields out of synthetic turf and not natural grass. Ripken Design endorses this option because of the direct benefits that turf offers regarding: drainage, maintenance cost, programming volume and durability. Although artificial turf costs nearly twice as much per square foot as natural grass during initial construction, for a facility that will be used heavily, the benefits of turf outweigh the upfront costs, especially when accounting for the materials, staffing, and equipment necessary to maintain a high-quality grass field.

Artificial Turf: Common Concerns

Pollutants and Water Quality

The Montgomery County, MD Department of Environmental Protection reviewed artificial turf and said, “in general, most of the studies reviewed by DEP did not find conclusive evidence of water quality or air quality impacts of concern.” While they did not rule out the possibility that there could be environmental issues, none have been determined to date.

Heat Gain

Heat Gain is a legitimate concern with artificial turf, especially in warm climate like Port Charlotte. The best solution is to avoid programming during the peak hours of the day, accompanied by offering cooling stations, shade and beaks for participants. Turf companies are aware of the issue. AstroTurf, for example, launched an institute in conjunction with the University of Tennessee to monitor artificial turf and devise ways to reduce the heat gain effect. At the 2010 Stadia Conference they demonstrated a model that exhibited significantly less heat gain than previous versions.

Montgomery County Staff addressed the heat gain as follows:

One recurring concern, that artificial turf fields can get much hotter at the surface level than natural grass fields, can be addressed by having policies regarding watering fields and/or prohibiting play at peak temperature levels. For instance, as mentioned in the materials from Soccerplex staff, players on artificial turf fields at the Soccerplex are moved to grass fields when possible if the temperature reaches 90 degrees or a code red day is declared. Mandatory water breaks are also required.

The Heat Gain concerns with artificial turf may be enough to consider only partially turfing the complex. Partially turfing is a reasonable solution although this would decrease the amount of programming that could be run, increase susceptibility of rainouts, and cause maintenance costs to skyrocket. Another option may be to purchase more technologically advanced turf products designed to reduce heat gain by changing the angle of the grass blades or infill. While more expensive, these may be excellent options for the south Florida climate.

Lead and Contaminants

On June 18, 2008 the Centers for Disease Control released a statement that indicated the minor presence of lead has been found on artificial turf fields in New Jersey—notably older fields that had worn and weathered. While the amounts of lead found were minimal, they were cause for alarm. On July 30, 2008 the US Consumer Product Safety Commission released an evaluation of synthetic fields that concluded that young children

are not at risk from exposure to lead in these fields. On December 10, 2009 the Environmental Protection Agency released a study that expressed a “low level of concern in samples of recycled tires from ball field and playground surfaces.” At this time, artificial turf surfaces are considered completely safe for sports play of all ages, with no real risk of exposure to contaminants or any short-term or long-term effects.

Infection and Inquiry

Common concerns with Artificial Turf are related to the idea of an increased likelihood of injury or infection on turf. An extensive August 2008 study released by the State of New York Department of Health found these concerns to be overblown. They state:

We identified five studies that compared injury (e.g. sprains, lacerations, fractures) rates among athletes when playing on infilled synthetic turf and natural grass fields...the studies concluded that there were no major differences in overall injury rates between natural and synthetic turf.

On infection:

Disease outbreak investigations conducted in response to illnesses caused by a variety of germs have not identified play fields, either natural or synthetics, as likely to increase the risk of transmitting infections.

Skin cuts and abrasions that may result from contact with athletic fields, including both natural and synthetic fields, are susceptible to infection. Athletics and others developing skin abrasions should clean the wounds and seek prompt medical attention.

Product Life

It is widely believed that the life of an artificial turf field is ten (10) years. This is roughly twice as long as the replacement life of a natural grass field at five (5). Both types of fields are often utilized for longer than their projected life. However, upon replacement, it is important to note that only the artificial turf itself, not the sub-base or concrete curbing that contributes to more than half of the cost of an artificial turf field, needs to be replaced. The replacement cost of synthetic turf, then, is on par with the installation cost of a high-quality natural grass field. These rough product lifetimes are confirmed by the New York City Department of Parks & Recreation.

Turf vs. Grass Pricing

In addition to the durability and product life, one of the biggest advantages of turf fields is the reduced cost compared to natural grass. The price matrix below demonstrates the relative affordability as opposed to natural grass:

Natural	Synthetic	Annual Maintenance Cost	Total Annual Cost (with Debt Service)
0	8	\$135,413.64	\$382,560.81
1	7	\$188,371.73	\$435,823.82
2	6	\$218,610.72	\$466,367.73
3	5	\$207,521.19	\$455,583.12
4	4	\$235,150.76	\$483,517.62
5	3	\$321,543.69	\$570,215.46
6	2	\$346,740.95	\$595,717.65
7	1	\$370,780.40	\$620,062.03
8	0	\$393,433.68	\$552,314.01

The matrix above was built to include eight (8) fields in consideration of possible expansion, and the total annual cost column includes everything from the product itself to installation to the annual maintenance. The savings of using synthetic turf are substantial and considering the potential effects of the Florida heat on natural grass, the savings could be even higher.

The estimated budget cost of the baseball fields is approximately \$4,028,568. In addition to the fields, the existing infrastructure on the site must be cleared and graded. The estimated budget cost for clearing and grading is \$1,596,000. Hardscape will be maintained in areas where it can be appropriately integrated into the new facility design.

Training Areas

Training Circle

It is recommended that the complex have two (2) designated training and warm up area for teams waiting before, in between, or after their games. The patented Ripken Training Circle is a unique, synthetic turf practice area designed to efficiently teach the fundamentals of baseball. The circles can be used for teaching individual drills, as a warm up area, for awards ceremonies, team gatherings, or competitions and contests.

Bullpen Area

A centralized bullpen area is the best option for the proposed complex as opposed to individual bullpens for each field.

Batting Cages

Two sets of centrally located, covered batting cages are recommended for the complex. Professional-quality batting cages would be able to accommodate multiple teams at the same time.

The estimated budget cost of training areas is approximately \$340,000.

Hardscape

Ripken Design recommends using the existing parking infrastructure, although some additional parking will also need to be constructed.

Parking

The site will need to have adequate parking for a facility at maximum capacity. This means having enough spaces to accommodate cars for visitors for one game per field, plus the next game per field (e.g. those waiting for their game to start). Parking should be centered on the main entrance to the site. The parking surface should meet local code and handicapped accessible parking must be provided in the areas closest to the facility entrance. Appropriate lighting for the parking area should also be provided.

Plaza, Landscaping, Maintenance Area

Ripken Design recommends a plaza that can serve as a focal point for the facility, as well as a backbone walkway that extends throughout the complex. This will help to visually and experientially tie together the facility. Landscape should be tasteful, and reflective of local plant species and aesthetics. The complex should exhibit a character indicative of Southern Florida and should avoid feeling like one large area of fields.

A maintenance building, located strategically away from major pedestrian paths, should be included to manage grounds and fields maintenance. Maintenance/cart paths should be non-intrusive and out of the way of major pedestrian thoroughfares.

The estimated budget cost of hardscape is approximately \$1,320,000.

Buildings and Amenities

Playground/Common Areas

The proposed baseball complex needs to be about more than just baseball. As a tournament facility there need to be ample amenities for families that can keep visitors entertained including:

- Playground
- Family gathering/Picnic Areas
- Open Space

Other secondary activity areas may be included if desired. Ripken Design strongly recommends the addition of family-friendly activities, both for complex visitors traveling to the area, but also for local residents that will use the facility as a complement to local parks.

The estimated cost of the proposed playground and common area is \$50,000.

Clubhouse

Ripken Design recommends a 5,000 square foot clubhouse complete with administrative space, restrooms, concessions, and indoor meeting areas. While the building does not have to be grand in scale, it should clearly be identifiable as the heart of the complex, and should provide primary access to the facility.

The estimated cost of the clubhouse is \$1,000,000.

Concessions

It is suggested that the complex feature at least one (1) 2,000 sq. ft. concessions building. The concession building should be easily accessible to spectators and participants.

The estimated cost of the concession building is \$312,500.

Restrooms

Recommended quantities for restrooms is one (1) stall per 80 women anticipated during the complexes highest volume, one (1) stall per 350 men and one (1) urinal per 100 men anticipated during the complexes highest volume. One baby-changing station per restroom is recommended. One 2,500 sq. ft. restroom structure, in addition to restrooms in the main clubhouse, should be sufficient.

The estimated cost of the restroom structure is \$312,500.

The estimated budget cost of the buildings and amenities is approximately \$2,254,375.

Financing Recommendations

As a public facility, public financing presents the most logical and logistically simple method of financing the \$9-10M project. There are a number of options that can and should be explored including:

- Tax-Exempt (Public) Bonds
- Hotel room assessment increases
- State Funding

Based on Ripken Design's assessment of the local market, a combination of these methods of financing should be pursued.

For large capital projects with long-term benefits for the area, a bond issue is the most common way to finance construction. There are a few options for bond issuance for this complex. Given the location of the proposed complex, Charlotte County may be able to issue bonds for construction.

A *General Obligation Bond*—backed by the full credit and authority of the entity that secures the bond—will typically sell at the best rates. However, given the disproportionate impact that the project will have on local hotel bookings, it is possible that a portion of the facility can be bonded and backed by an increase in hotel room-night assessments or taxes. Charlotte County can guarantee these fees as a designated revenue stream for the facility, and *Revenue Bonds* can be issued with that backing.

While the proposed complex will certainly have a local quality of life and recreational benefit, they are, primarily, an economic development and tourism driver. The number of visitors and the amount of economic impact that these facilities will generate is immense. One of the major beneficiaries, as indicated in the *Economic Impact* chapter, is the hospitality industry. Currently, Charlotte County levies a hotel room occupancy tax.

Given the tourist-centric nature of the complex, the existing hotel tax should be a source of funding for the project. While the tax is capped at 5%, of this tax collection, 40% is designated to be used for a sports park. While this would not pay for the project, it could be substantial enough to assist in funding the construction costs and fees and interest payments. A \$9.5 Million complex, financed at 3.5% over 20 years requires \$663,864 in annual payments. Ripken Design recommends including an additional \$1 Million of working capital into the initial bond issue to cover operational/staffing costs that will be incurred prior to facility opening and to cover any shortfalls that the project may incur in the first few years. The additional \$1 M will require an additional \$69,595 in annual payments over 10 years.

As the State of Florida is not currently in a position to provide funding for the proposed project, a public-private partnership with an outside developer could also be explored. As the other development in the proposed Murdock Village will be the beneficiaries of the sports complex, funding opportunities with these developers should be considered to supplement the local funds.

All of the costs presented in this chapter are for budgetary purposes only and are subject to change once the project enters a conceptual design phases, and will be further narrowed in subsequent design and engineering stages. Ripken Design has worked to present as accurate of a price range as possible, and has incorporated what is a fair estimate for project costs. Ripken Design believes that any additional costs beyond what has been presented in this chapter will be the result of a change in project scope, unfavorable site conditions or large infrastructure costs that need to be incurred just to prepare the site for construction, none of which can be estimated at this time.

VIII. VENUE PROGRAMMING

The recommended number of fields, batting cages, training areas, and amenities work well to accommodate both the tournaments programming needs and any supplemental local usage of the facility. Programming for the facilities proposed is considered below.

Types of Tournaments

As outlined earlier, there are a number of youth baseball tournament options available for the proposed facility. The national youth leagues each host World Series tournaments. Locations for these tournaments are usually bid-out years in advance. Other tournament sites are the permanent home of the competitions. For example, Williamsport, PA is the permanent home of the Little League World Series, and Aberdeen, MD is the permanent home of the Cal Ripken World Series. In addition to these tournaments, many leagues and associations have been formed to provide a series of tournaments leading up to a national “World Series.” For example, organizations such as United States Specialty Sports Association (USSSA), Triple Crown, and Nations Baseball, which have grown tremendously in the past few years, will host local, state, and regional tournaments all over the country. Facilities host these tournaments, turning over a fee to USSSA for each team participating in the events. In return, the venues will be awarded a certain number of berths to their tournament champions in each age group. Youth teams around the country search out as many of these qualifying tournaments as possible to play in, hoping to earn a berth to the national event.

There are a number of national associations across the country that sanction tournaments as well. These associations, including the Continental Amateur Baseball Association (CABA), National Amateur Baseball Federation (NABF), and American Amateur Baseball Congress (AABC) run thousands of potential events for a virtually endless supply of teams looks to fill the event spots. Similarly, local leagues like Little League, PONY, and Babe Ruth League host league games, district tournaments, and regional events, often at rotating sites that present a high-quality playing environment.

Unlike many other youth organizations, Ripken Baseball provides unique programming options and does not affiliate with tournament organizations such as USSSA or Nations Baseball. Through experiential tournament programming, exceptional facilities, and unique amenities, Ripken Baseball provides a first class tournament experience. Ripken Baseball would be willing to operate the complex as a “Ripken Experience,” facility, which would align the complex with the national network of Ripken operated facilities, and utilize the proprietary sales, operational and staffing models of Ripken Baseball. Tournaments and events would be self-operated (not affiliated with a particular sanctioning body), open to all teams under a management contract between the County and Ripken Baseball.

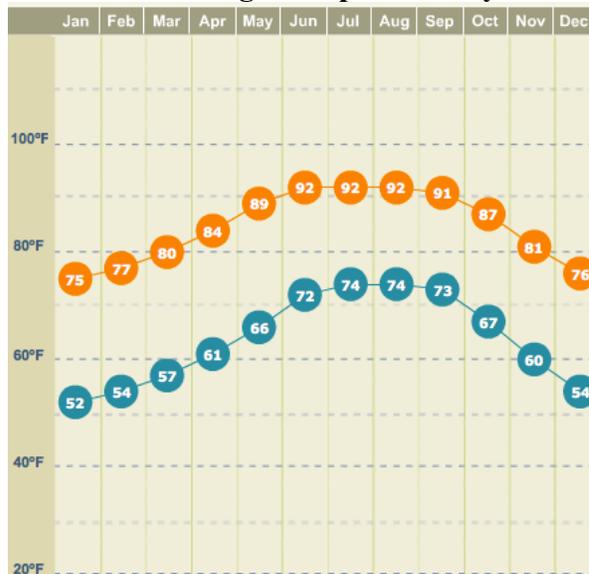
Tournament Timing

Youth play (Little League, Babe Ruth, etc.) in Florida generally begins in early to mid-February and ends at the beginning of June. In Florida, with a favorable climate, pre-season games and tournaments will often take place in the winter months, and extended fall leagues can run into November. Holiday weekends are generally left open to allow teams to play in other associations’ tournaments. At the conclusion of youth league seasons, there is a huge market of potential tournament teams—those that have been eliminated from postseason play—that begin looking to play more baseball. Based on this model, Memorial Day tournaments are enormously successful. After early June, any weekend becomes a potential tournament date, with the July 4th weekend proving to be a hugely successful youth tournament weekend. National tournaments or “World Series” tournaments begin around the second week of July.

Climate

Florida’s climate allows for the possibility of year-round play, avoiding an extended offseason due to cold and inclement weather. This allows tournaments in the area to begin a little bit earlier and extend later into the year. While the warm climate creates the potential for year-round play, excessive heat and humidity during the summer months will affect the complex.

Chart 8.1: Average Temperature by Month



Source: The Weather Channel

While the summer heat is an obstacle to non-stop tournament programming, precipitation is the biggest barrier. June through September, typically the most popular period for baseball and softball tournaments, is the rainiest part of the year in Charlotte County. Chart 8.2 below shows the average precipitation by month in the area.

Chart 8.2: Average Precipitation by Month

Source: The Weather Channel



Despite the rain, it is possible for the facility to maximize programming and playable hours, while minimizing the number of cancellations, scheduling backlogs, and minimal maintenance concerns. To do this, Ripken Design strongly recommends the construction of all fields using artificial turf. A high-quality artificial turf offers superior drainage and minimal maintenance so that, even though games may be postponed during heavy rain, there is no lag-time to get a field ready for play. Given Charlotte County’s climate, this component is essential.

Youth Baseball Tournament Play in Charlotte County, FL

The proposed six (6) new baseball fields will allow Charlotte County to host a wide range of age groups and levels. With this number of fields, the proposed facility can host the various types of tournaments run by Ripken Baseball. For a two-day weekend tournament, the complex will be able to draw up to 28 youth teams (5-14) and, using rentable fields at the Charlotte Sports Park, 16 older teams (14-18). For a three-day holiday weekend tournament, the complex will be able to draw up to 40 youth teams and 24 older teams. Two and three day tournaments will guarantee each team three (3) games in a round robin format with the top teams moving on to a bracket play. While the majority of programming will be weekend and holiday tournaments, the proposed facility can also attract up to 28 youth teams and 20 older teams for weeklong tournaments. Weeklong tournaments can guarantee each team five (5) games.

Softball Spring Training

While the exterior fields at the Charlotte Sports Park will be occupied during the Spring Training months, the proposed complex could be successful in attracting high school and college softball teams for a Spring Training package. The facility will be able to attract up to 16 teams per week at a rate of \$60 per player/coach.

Youth Baseball Camps

A high-quality tournament baseball complex can also be used for youth camps as well. The proposed location with an excellent climate, setting, and entertainment options (existing and proposed) nearby support the ability to successfully host camps. Camps will never be the focus of the complex, but can complement the tournament schedule after programming has concluded. Tournaments can be run on the weekends while camps are run during the week, creating a virtually constant stream of revenue throughout the spring, summer, and into the fall. Ripken Design recommends that the complex not run a camp schedule in the first two years until the facility is established in the market.

Lodging Consideration

In order for tournaments and camps to be successful in Charlotte County, there must be enough lodging to accommodate the tournament participants, their guests, camps, and camp staff. Currently there are a number of hotels at a variety of price points including, motels, hotels, and beach resorts. While there are existing hotels, the addition of on-site accommodations, especially with a selection of suites and experiential theming, will be essential to enhancing the options for tournament goers.

IX. OPERATING PLAN & OVERVIEW

As stated in the *Venue Programming* chapter, the proposed complex will be able to support a number of programming options including tournaments, camps, leagues, and other events. The programming calendar and suggestions are by no means set; various changes can and should be made in the future as the actual users are identified and local scheduling becomes clearer. Revenue projections for the complex were completed using the following programming model, which assumes public ownership and operation of the facility.

Operating Model

The operating model and pro formas presented in this report are based on a proposed management agreement between Charlotte County and Ripken Baseball. Through the agreement, a local entity, to be referred to here as Ripken Port Charlotte (RPC), would take responsibility for the day to day operations of the facility including, tournament staffing, local sales, team relations, facility maintenance, corporate relations etc. This will require the placement of the following staff:

- Salaried Staff
 - o General Manager
 - o Assistant General Manager
 - o Facilities Manager
 - o Manager of Operations
 - o Facilities Supervisor
 - o Book Keeper
 - o Remote Sales
- Part-time and Seasonal Staff
 - o Concessions & Merchandise
 - o Event and Tournament Operations Staff

In addition to the permanent on-site positions, the management agreement will provide executive, administrative and sales staffing from Ripken Baseball at the national level. This would include significant involvement, during design, construction, start-up, and ongoing operations from Ripken Baseball executives and management-level staff. Ongoing involvement from accounting, operations, food & beverage, merchandise and design staff will be incorporated to ensure that the facility meets the requirements of a “Ripken Experience” facility. Furthermore, Ripken Baseball’s dedicated national sales staff, headquartered in Aberdeen, MD will handle all team sales for the new facility in Port Charlotte, alongside existing facilities in Aberdeen and Myrtle Beach, SC.

As part of the management agreement, Ripken Baseball will be compensated in the form of 10% of gross sales for the facility, under a management, brand and licensing agreement. An additional fee of \$25,000 will be designated to Ripken Design for ongoing facility improvements, consulting and quality standards testing. Cost reimbursement for

executive time allocation is also incorporated in the model. As an incentive for providing robust sales and continued improvement, RPC will share in 50% of the net operating margin (EBITDA) of the facility.

In addition to providing long-term consistency to the project, this comprehensive management agreement will provide two things for the county: no up-front management, licensing or other fees (all fees are paid from facility operating income), and no ongoing maintenance or facility operation costs. In addition, RPC will be able to accommodate local recreation needs in Charlotte County, subject to facility availability.

Operating under this management agreement, the following programming is anticipated:

2 Day Tournaments

28 teams (under age 14) and 16 teams (ages 14-18) will be invited to attend. These tournaments run Saturday-Sunday and guarantee three (3) games. Each team will pay an entry fee of \$550 for both younger and older teams. In the first year of operation, the complex should hold 18 youth and 15 older weekend tournaments. The programming calendar is expected to increase each year before reaching the capacity of 30 youth and 25 older two-day baseball tournaments.

3 Day Holiday Tournaments

40 teams (under age 14) and 24 teams (ages 14-18) will be invited to attend. These tournaments run Friday-Sunday or Saturday-Monday and will take place over holiday weekends: Memorial Day, 4th of July, Labor Day, etc. Each team will pay an entrance fee of \$650 for both younger and older teams. In the first year of operation, the complex should hold 3 youth and 3 older holiday weekend tournaments. The programming calendar is expected to increase each year before reaching the capacity of seven (7) youth and seven (7) older three-day holiday baseball tournaments.

Weeklong Tournaments

A weeklong tournament, possibly an affiliated World Series, can accommodate up to 28 teams (under age 14) and 20 teams (14-18) with a 5 game guarantee. Capacity can be expanded depending on the structure of the tournament or if fewer games are guaranteed. Fees for weeklong tournaments will be \$350 per person.

Spring Training

High school and collegiate softball spring training can accommodate up to 16 teams per week. The spring training package will allow teams from cold weather areas to scrimmage against other teams and practice in preparation for their upcoming season. Softball spring training would cost \$60 per player/coach. In the first year of operation, the complex should include two (2) weeks of Spring Training, increasing to the maximum of

six (6) weeks by the fifth year. Baseball spring training will not be offered, as the available 90' diamonds will be in use by the Tampa Bay Rays and there is no market for youth baseball spring training programming.

League Play

Youth baseball leagues can accommodate up to 28 teams with a costs of \$1,000 per team. League play would have a ten game guarantee and capacity can be expanded depending on demand.

Operating Income Assumptions:

Tournaments

- 12 players per team
- 3 coaches per team
- 2.5 guests per player
- Tournament merchandise: \$3 per cap per events. 50% profit margin
- League merchandise: \$3 per cap per events. 50% profit margin
- Tournament concessions: \$3 per cap per day with a 50% profit margin
- League concessions: \$1 per cap with a 50% profit margin
- Two (2) umpires per game. Umpires receive \$50 per game.
- \$4 umpire assignor fee per game
- \$100 field rental fee per field per day (Older tournaments only)
- \$180 for tournament awards
- \$148 for skills competition awards (weeklong only)
- \$3 per game ball with six (6) game balls per game
- \$50 per player/coach for all-access passes (weeklong only)
- Assuming 75% of visitors stay at preferred hotels, there will be a 10% hotel commission on total spending on lodging

Spring Training

- 15 players per team
- 3 coaches per team
- \$1,800 per team for accommodations
- \$118.5 for three dozen game balls per team
- Two (2) umpires per game. Umpires receive \$50 per game.
- \$4 assignors fee per game

* These assumptions are estimates and actual costs and programming will vary

Port Charlotte Experience

Total Visitors	53,286	59,664	70,242	79,980	97,488
<u>Operating Revenue</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Outdoor Facilities					
Youth Tournaments	\$ 502,200	\$ 548,400	\$ 620,600	\$ 692,800	\$ 938,000
Older Tournaments	\$ 283,800	\$ 301,400	\$ 343,400	\$ 376,600	\$ 539,200
Softball Tournaments	\$ -	\$ -	\$ -	\$ -	\$ -
Spring Training	\$ 172,800	\$ 259,200	\$ 345,600	\$ 432,000	\$ 518,400
Camps	\$ -	\$ -	\$ 69,500	\$ 76,450	\$ 104,250
Youth Leagues	\$ 40,000	\$ 48,000	\$ 64,000	\$ 70,400	\$ 80,000
Sponsorships	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Food & Beverage	\$ 389,880	\$ 431,820	\$ 514,440	\$ 565,884	\$ 731,880
Merchandise	\$ 362,880	\$ 399,420	\$ 471,240	\$ 518,364	\$ 677,880
Hotel & Vendor Commissions	\$ 134,895	\$ 148,295	\$ 172,640	\$ 195,137	\$ 250,238
Total Operating Revenue	\$ 1,986,455	\$ 2,236,535	\$ 2,701,420	\$ 3,027,635	\$ 3,939,848
Operating Expenses					
Youth Tournaments	\$ (182,604)	\$ (201,252)	\$ (228,312)	\$ (266,872)	\$ (351,224)
Older Tournaments	\$ (105,118)	\$ (112,666)	\$ (129,226)	\$ (154,612)	\$ (211,904)
Softball Tournaments	\$ -	\$ -	\$ -	\$ -	\$ -
Spring Training	\$ (69,712)	\$ (104,568)	\$ (139,424)	\$ (174,280)	\$ (209,136)
Camps	\$ -	\$ -	\$ (31,275)	\$ (34,403)	\$ (46,913)
Youth Leagues	\$ (18,000)	\$ (21,600)	\$ (28,800)	\$ (31,680)	\$ (36,000)
Food & Beverage COGS	\$ (194,940)	\$ (215,910)	\$ (257,220)	\$ (282,942)	\$ (365,940)
Merchandise COGS	\$ (181,440)	\$ (199,710)	\$ (235,620)	\$ (259,182)	\$ (338,940)
Total Operating Expenses	\$ (375,434)	\$ (440,086)	\$ (557,037)	\$ (661,847)	\$ (855,177)
Operations, Licensing, and Branding	\$ (198,645)	\$ (223,653)	\$ (270,142)	\$ (302,763)	\$ (393,985)
Ripken Design Fee	\$ (25,000)	\$ (25,000)	\$ (25,000)	\$ (25,000)	\$ (25,000)
Management Cost Allocation	\$ (360,000)	\$ (370,800)	\$ (381,924)	\$ (393,382)	\$ (405,183)
Advertising & Marketing	\$ (75,000)	\$ (77,250)	\$ (79,568)	\$ (81,955)	\$ (84,413)
Bank Service Charges	\$ (10,000)	\$ (10,300)	\$ (10,609)	\$ (10,927)	\$ (11,255)
Cleaning Expense	\$ (20,000)	\$ (20,600)	\$ (21,218)	\$ (21,855)	\$ (22,510)
Computer Internet	\$ (30,000)	\$ (30,900)	\$ (31,827)	\$ (32,782)	\$ (33,765)
Credit Card Fees	\$ (24,522)	\$ (25,257)	\$ (26,015)	\$ (26,796)	\$ (27,600)
Dues and Subscriptions	\$ (3,000)	\$ (3,090)	\$ (3,183)	\$ (3,278)	\$ (3,377)
Employee Benefits	\$ (68,519)	\$ (75,370)	\$ (82,907)	\$ (91,198)	\$ (100,318)
Minor Equipment	\$ (3,000)	\$ (3,090)	\$ (3,183)	\$ (3,278)	\$ (3,377)
Gifts and Flowers	\$ (500)	\$ (515)	\$ (530)	\$ (546)	\$ (563)
Insurance	\$ (80,000)	\$ (82,400)	\$ (84,872)	\$ (87,418)	\$ (90,041)
Licenses, Fees and Permits	\$ (2,500)	\$ (2,575)	\$ (2,652)	\$ (2,732)	\$ (2,814)
Office Expense	\$ (10,000)	\$ (9,730)	\$ (9,467)	\$ (9,212)	\$ (8,963)
Postage	\$ (4,000)	\$ (4,120)	\$ (4,244)	\$ (4,371)	\$ (4,502)
Printing & Reproduction	\$ (15,000)	\$ (15,450)	\$ (15,914)	\$ (16,391)	\$ (16,883)
Professional Fees	\$ (15,000)	\$ (15,450)	\$ (15,914)	\$ (16,391)	\$ (16,883)
Repairs & Maintenance	\$ (150,000)	\$ (154,500)	\$ (159,135)	\$ (163,909)	\$ (168,826)
Salaries and Wages	\$ (448,000)	\$ (461,440)	\$ (475,283)	\$ (489,542)	\$ (504,228)
Security	\$ (5,000)	\$ (5,150)	\$ (5,305)	\$ (5,464)	\$ (5,628)
Seminars & Conferences	\$ (1,000)	\$ (1,030)	\$ (1,061)	\$ (1,093)	\$ (1,126)
Staff/Team (Equip. and Apparel)	\$ (3,000)	\$ (3,090)	\$ (3,183)	\$ (3,278)	\$ (3,377)
Travel and Entertainment	\$ (5,000)	\$ (5,150)	\$ (5,305)	\$ (5,464)	\$ (5,628)
Telephone	\$ (25,000)	\$ (25,750)	\$ (26,523)	\$ (27,318)	\$ (28,138)
Utilities w/o Field Lights	\$ (15,000)	\$ (15,450)	\$ (15,914)	\$ (16,391)	\$ (16,883)
Total Expenses	\$ (1,972,120)	\$ (2,107,197)	\$ (2,317,912)	\$ (2,504,579)	\$ (2,840,438)
(Fixed Expenses)	\$ (1,596,686)	\$ (1,667,111)	\$ (1,760,875)	\$ (1,842,732)	\$ (1,985,261)
EBITDA	\$ 14,335	\$ 129,337	\$ 383,508	\$ 523,056	\$ 1,099,410
NET INCOME	\$ 14,335	\$ 129,337	\$ 383,508	\$ 523,056	\$ 1,099,410
Reserve Fund	\$ 1,000,000				
Net Fund Payment	\$ -				
Net Reserve Fund	\$ 1,000,000				
Profit (Shared)	\$ 14,335	\$ 129,337	\$ 383,508	\$ 523,056	\$ 1,099,410

Ripken Experience - Port Charlotte

MURDOCK VILLAGE SITE		CPU	Total Cost
Clearing and Rough Grading			
North side	30.0 AC	\$ 53,200.00	\$ 1,596,000.00
TOTAL CLEARING	30.0 AC		\$ 1,596,000.00
Hardscape			
Existing Parking Area	125,000.0 SF	\$0.00	0
Additional Parking	25,000 SF	\$3.00	75,000
Pedestrian Paving	25,000 SF	\$5.00	125,000
Plaza Areas	30,000 SF	\$12.00	360,000
Tube steel fence	6,000 LF	\$35.00	210,000
Site Lighting Allowance	1 LS	\$100,000.00	100,000
Shade structures	10 LS	\$15,000	150,000
Landscaping Allowance	1 LS	\$250,000.00	250,000
Site Amenities (Benches, Tra	1 LS	\$50,000.00	50,000
TOTAL HARDSCAPE			1,320,000
Buildings & Amenities			
Clubhouse Bldg	5,000.0 SF	\$ 200.00	\$ 1,000,000.00
Concessions Bldg	2,500.0 SF	\$ 125.00	\$ 312,500.00
Restroom Bldg	2,500.0 SF	\$ 125.00	\$ 312,500.00
Maintenance Bldg	4,000.0 SF	\$ 65.00	\$ 260,000.00
Maintenance yard	28,000.0 SF	\$ 6.00	\$ 168,000.00
Playgrounds & Family Areas	1.0 LS	\$ 50,000.00	\$ 50,000.00
Family Areas	1.0 LS	\$ 10,000.00	\$ 10,000.00
Furnishings	7.5 %		\$ 141,375.00
TOTAL BUILDINGS & AMENITIES			\$ 2,254,375.00
Training Areas			
Bullpens	2.0 SET	\$ 20,000.00	\$ 40,000.00
Batting Cages	3.0 SET	\$ 40,000.00	\$ 120,000.00
2 - Training Circle (70')	2.0 LS	\$ 90,000.00	\$ 180,000.00
TOTAL TRAINING AREAS			\$ 340,000.00
Playing Fields - Youth			
Excavation and Silt Fence	54,000.0 SF	0.93	\$ 50,000.00
Drainage/Pipe	54,000.0 SF	1.11	\$ 60,000.00
Laser Grading for Subgrade E	54,000.0 SF	0.16	\$ 8,500.00
Drainage Stone	1750 TON	42	\$ 73,500.00
Topping Stone	900 TON	42	\$ 37,800.00
Laser Grading Gravel Layers	54000 SF	0.2	\$ 10,800.00
Structural Fabric	70000 SF	0.14	\$ 9,800.00
Turf Anchor Curb	880 LF	19.55	\$ 17,204.00
Synthetic Turf	54000 SF	2.25	\$ 121,500.00
Infill	54000 SF	0.25	\$ 13,500.00
Synthetic Turf Installation	54000 SF	1.71	\$ 92,340.00
Scoreboard	1 EA	7500	\$ 7,500.00
Plate Bases and Anchors	1 SET	900	\$ 900.00
Mound and Batters Box	1 EA	2500	\$ 2,500.00
Washdown System	1 EA	4950	\$ 4,950.00
Dugouts	2 EA	25000	\$ 50,000.00
Foul Poles	1 SET	4750	\$ 4,750.00
Fencing and Backstop	1 EA	82500	\$ 82,500.00
Bleachers	2 EA	7500	\$ 15,000.00
Dugout and Bleacher Pads	1280 SF	6.55	\$ 8,384.00
Subtotal Per Field	-	-	\$ 671,428.00
TOTAL YOUTH FIELDS			\$ 4,028,568.00
TOTAL PROJECT COST			
			\$ 9,538,943.00
			\$ 10,538,943.00

Economic Impact

Year 1					
Category	Per Person/	Direct Impact	Total Spending	Jobs Crea	Wage Impact
Lodging	\$22.92	\$1,864,606.18	\$2,195,387.31	14.40	\$436,504.31
Transportation	\$4.28	\$348,189.98	\$373,921.22	8.81	\$198,050.46
Food/Beverage	\$16.32	\$1,327,677.70	\$1,503,993.29	19.63	\$389,009.56
Other Spending	\$13.61	\$1,107,211.61	\$1,308,834.84	14.26	\$470,786.38
Entertainment	\$2.91	\$236,736.65	\$273,418.99	3.61	\$88,148.89
Shopping	\$3.38	\$274,972.46	\$310,416.41	3.34	\$87,138.77
Event Related Expenses	\$4.97	\$404,323.42	\$456,440.70	4.92	\$128,130.09
Total	\$68.39	\$5,563,717.99	\$6,422,412.78	68.97	\$1,797,768.46

Year 2					
Category	Per Person/	Direct Impact	Total Spending	Jobs Crea	Wage Impact
Lodging	\$22.92	\$2,076,276.96	\$2,444,608.49	16.03	\$486,056.44
Transportation	\$4.28	\$387,716.64	\$416,368.90	9.81	\$220,533.22
Food/Beverage	\$16.32	\$1,478,396.16	\$1,674,727.17	21.86	\$433,170.07
Other Spending	\$13.61	\$1,232,902.68	\$1,457,414.26	15.88	\$524,230.22
Entertainment	\$2.91	\$263,611.08	\$304,457.62	3.46	\$98,155.59
Shopping	\$3.38	\$306,187.44	\$345,655.00	3.72	\$97,030.80
Event Related Expenses	\$4.97	\$450,222.36	\$508,256.02	5.48	\$142,675.47
Total	\$68.39	\$6,195,313.32	\$7,151,487.46	76.24	\$2,001,851.81

Year 3					
Category	Per Person/	Direct Impact	Total Spending	Jobs Crea	Wage Impact
Lodging	\$22.92	\$2,433,883.97	\$2,865,654.98	18.80	\$569,772.24
Transportation	\$4.28	\$454,494.91	\$488,082.09	11.50	\$258,516.71
Food/Beverage	\$16.32	\$1,733,027.33	\$1,963,173.36	25.63	\$507,777.01
Other Spending	\$13.61	\$1,445,251.34	\$1,708,431.61	18.61	\$614,520.87
Entertainment	\$2.91	\$309,014.06	\$356,895.79	4.06	\$115,061.39
Shopping	\$3.38	\$358,923.55	\$405,188.80	4.37	\$113,742.87
Event Related Expenses	\$4.97	\$527,766.29	\$595,795.36	6.42	\$167,249.14
Total	\$68.39	\$7,262,361.46	\$8,383,221.99	89.37	\$2,346,640.22

Year 4					
Category	Per Person/	Direct Impact	Total Spending	Jobs Crea	Wages Impact
Lodging	\$22.92	\$2,766,847.39	\$3,257,686.12	21.37	\$647,718.97
Transportation	\$4.28	\$516,671.33	\$554,853.34	13.07	\$293,882.65
Food/Beverage	\$16.32	\$1,970,111.23	\$2,231,742.00	29.13	\$577,242.59
Other Spending	\$13.61	\$1,642,966.54	\$1,942,150.74	21.16	\$698,589.37
Entertainment	\$2.91	\$351,288.22	\$405,720.33	4.61	\$130,802.17
Shopping	\$3.38	\$408,025.49	\$460,619.97	4.96	\$129,303.28
Event Related Expenses	\$4.97	\$599,966.47	\$677,302.15	7.30	\$190,129.37
Total	\$68.39	\$8,255,876.66	\$9,530,074.65	101.60	\$2,667,668.41

Year 5					
Category	Per Person/	Direct Impact	Total Spending	Jobs Crea	Wages Impact
Lodging	\$22.92	\$3,534,539.04	\$4,161,566.27	27.30	\$827,435.59
Transportation	\$4.28	\$660,027.36	\$708,803.38	16.70	\$375,423.56
Food/Beverage	\$16.32	\$2,516,739.84	\$2,850,962.89	37.21	\$737,404.77
Other Spending	\$13.61	\$2,098,825.32	\$2,481,021.41	27.03	\$892,420.53
Entertainment	\$2.91	\$448,756.92	\$518,291.80	5.89	\$153,442.05
Shopping	\$3.38	\$521,236.56	\$588,423.95	6.34	\$165,179.87
Event Related Expenses	\$4.97	\$766,433.64	\$865,226.94	9.32	\$242,882.82
Total	\$68.39	\$10,546,558.68	\$12,174,296.64	129.79	\$3,394,189.19

X. ECONOMIC IMPACT

Methodology

Ripken Design's economic impact analysis looks at the effect that the recommended operating plan, as illustrated in the *Operating Plan Overview*, has on the local economy. Through the development of the Operating Plan, Ripken Design is able to project the total number of visitors to the proposed complex and their average length of stay in the area for a tournament. Based on data gathered through years of operating tournaments in Aberdeen, MD and Myrtle Beach, SC, regarding visitor expenditures in a number of categories, Ripken Design has established an average per-day, per-person amount spent on local goods and services. Ripken Baseball has also commissioned independent impact analysis to verify that data for specific tournaments held at the Aberdeen and Myrtle Beach facilities.

With the projected number of complex visitors and daily spending averages in hand, Ripken Design can establish a total expenditure amount on a per-event basis. Using the projected programming calendar, the individual event data is extrapolated over the course of the entire operating season. The final result is a total economic impact number, as well as category-specific totals.

The final step requires the use of RIMS II Economic Impact multipliers for Charlotte County, FL, compiled and supplied by the Bureau of Labor Statistics. Using the per-person, per-day expenditures identified by Ripken Baseball to quantify direct expenditures, the RIMS II Type-I multipliers were used to calculate the following:

- Total Economic Impact (Direct + Indirect Spending)
- Jobs Impact (New Local Jobs, by industry)
- Wage Impact (Additional local wages)

It should be noted that the economic impact offered in this section does not include any of the design, engineering or construction associated with building the new facility. Only the impact associated with annual facility operations has been included.

Economic Impact Analysis

Ripken Design has projected a programming schedule featuring 41 different baseball and softball tournaments in year one, increasing to 79 by year five. Considering the players, coaches, and visitors to the complex over the course of the season, Ripken Design projects that 53,286 people will visit the complex in the first year, increasing to 97,488 by year five. Ripken Design estimates that the total annual economic impact on the community will fall between 6,400,000 million and 12,100,000 million during the first five years of operations. Low and High estimates of per-category spending are shown below:

Table 10.1: Low Estimate

Year 1					
Category	Per Person/Day	Direct Impact	Total Spending	Jobs Created	Wage Impact
Lodging	\$22.92	\$1,864,606.18	\$2,195,387.31	14.40	\$436,504.31
Transportation	\$4.28	\$348,189.98	\$373,921.22	8.81	\$198,050.46
Food/Beverage	\$16.32	\$1,327,677.70	\$1,503,993.29	19.63	\$389,009.56
Other Spending	\$13.61	\$1,107,211.61	\$1,308,834.84	14.26	\$470,786.38
Entertainment	\$2.91	\$236,736.65	\$273,418.99	3.61	\$88,148.89
Shopping	\$3.38	\$274,972.46	\$310,416.41	3.34	\$87,138.77
Event Related Expenses	\$4.97	\$404,323.42	\$456,440.70	4.92	\$128,130.09
Total	\$68.39	\$5,563,717.99	\$6,422,412.78	68.97	\$1,797,768.46

This projection estimates 22,996 room nights per year are generated by the operation of this complex in Year 1.

Table 10.2: High Estimate

Year 5					
Category	Per Person/Day	Direct Impact	Total Spending	Jobs Created	Wages Impact
Lodging	\$22.92	\$3,534,539.04	\$4,161,566.27	27.30	\$827,435.59
Transportation	\$4.28	\$660,027.36	\$708,803.38	16.70	\$375,423.56
Food/Beverage	\$16.32	\$2,516,739.84	\$2,850,962.89	37.21	\$737,404.77
Other Spending	\$13.61	\$2,098,825.32	\$2,481,021.41	27.03	\$892,420.53
Entertainment	\$2.91	\$448,756.92	\$518,291.80	5.89	\$153,442.05
Shopping	\$3.38	\$521,236.56	\$588,423.95	6.34	\$165,179.87
Event Related Expenses	\$4.97	\$766,433.64	\$865,226.94	9.32	\$242,882.82
Total	\$68.39	\$10,546,558.68	\$12,174,296.64	129.79	\$3,394,189.19

This projection estimates 43,320 room nights per year are generated by the operation of this complex in Year 5. There is existing total capacity of 737,300 year-round hotel and motel room-nights in the area, or 210,657 Friday and Saturday nights—the evenings that most visitors will spend during a tournament event.

The sheer volume of additional dollars reaching the area due to the addition of the complex is impressive. At least 6,400,000 currently being spent in other tournament destinations outside the county will be spent locally on an annual basis, providing revenue and job growth across the area, especially in the industries of lodging, food/beverage, and entertainment. This should come as no surprise. Many of the teams and families traveling to the tournament will stay locally for the duration of the tournament. The majority of the new job creation may be attributed to the development of additional hotels, to accommodate the increased traffic to the area, or simply additional staff hired at existing hotels to handle the extra room-nights that the complex will create. Similarly, the food industry will benefit tremendously from the influx of people that will come to the area each weekend and seek 2-3 meals a day for the duration of the tournament. As most teams have only a game or two each day, there is also the need to

fill the rest of the day with entertainment options for teams and families. Here the local industry gets another boost, as they are treated to thousands of people looking for additional activities during their time in town.

The proposed complex will also significantly reduce the “leakage” that Charlotte County currently experiences. Leakage occurs when teams and families from a local area need to travel elsewhere for competitive play. Due to shortage of high-quality facilities and the desire for varied tournament experiences, many teams and families travel elsewhere for tournaments. By constructing a first-class facility locally, this leakage effect can be drastically cut, keeping more money within the county. While it will not keep teams from traveling to other tournaments, a new facility will help keep local teams in Charlotte County instead of making frequent trips to other local/regional facilities.

All together, the addition of approximately 68 jobs, growing to 130 jobs, based on the spending that is directly attributable to the operations of the proposed complex will be a welcome addition to the area. While sports complexes are hardly a major economic driver compared to other industries, they can play an important role in the economy and the infrastructure of an area and become a valuable part of daily life and economic growth.