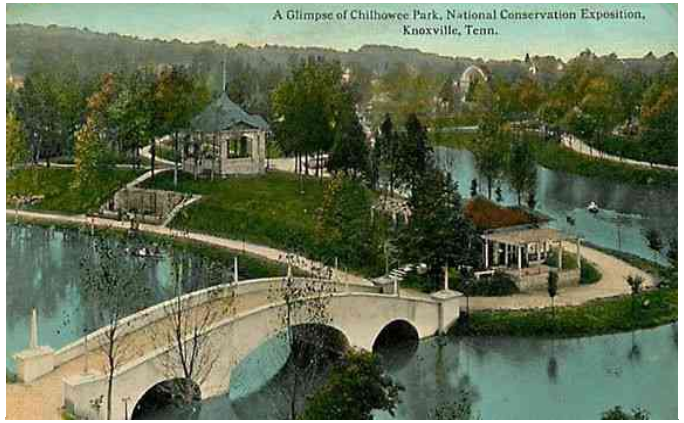
STRATEGIC PLAN RECOMMENDATIONS FOR A FUTURE CHILHOWEE PARK & EXPOSITION CENTER

October 16, 2019



CITY OF KNOXVILLE

CONVENTIONS SPORTS & LEISURE CSL

IBI PLACEMAKING FORMERLY CRJA

sizemoregroup

DIA Design Innovation ARCHITECTS + INTERIORS + PLANNING

October 16, 2019

Honorable Madeline Rogero
Mayor
City of Knoxville
400 Main Street, Suite 691
Knoxville, Tennessee 37901

Dear Mayor Rogero:

Conventions, Sports & Leisure International (CSL), in conjunction with Design Innovation Architects (DIA), Sizemore Group (Sizemore), and IBI Placemaking (formerly CRJA), has completed a study related to Strategic Plan Recommendations for a Future Chilhowee Park & Exposition Center.

The analysis presented in this report is based on estimates, assumptions and other information developed from industry research, data provided by study stakeholders, surveys of user groups and community constituents, discussions with industry participants and analysis of competitive/comparable facilities and communities. The sources of information, the methods employed, and the basis of significant estimates and assumptions are stated in this report. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from those described and the variations may be material.

The findings presented herein are based on analyses of present and near-term conditions in the Knoxville area. As in all studies of this type, the recommendations and estimated results are based on competent and efficient management of the subject facilities and assume that no significant changes in the event/utilization markets or assumed immediate and local area market conditions will occur beyond those set forth in this report. Furthermore, all information provided to us by others was not audited or verified and was assumed to be correct.

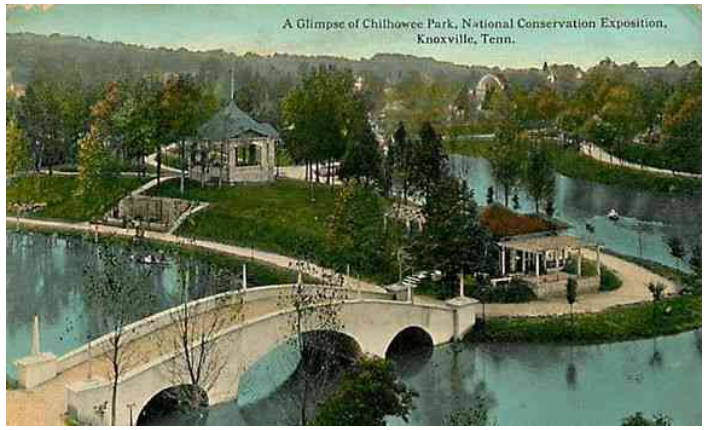
The report has been structured to provide the City and stakeholders with a foundation of research to provide decision makers with the information necessary to evaluate issues related to potential future decisions concerning the future use of Chilhowee Park & Exposition Center and should not be used for any other purpose. This report, its findings or references to CSL may not be included or reproduced in any public offering statement or other financing document.

We sincerely appreciate the assistance and cooperation we have been provided in the compilation of this report and would be pleased to be of further assistance in the interpretation and application of our findings.

Very truly yours,

CSL International

CSL International



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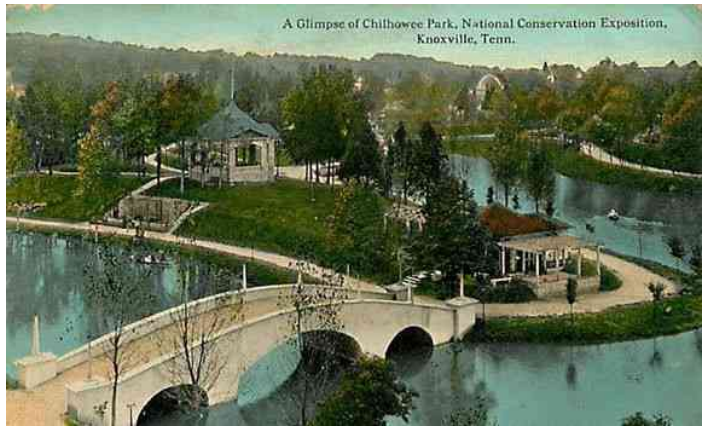

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INTRODUCTION & ACKNOWLEDGEMENTS

1. INTRODUCTION: Project Background & Approach

Conventions, Sports & Leisure International (CSL), in conjunction with Design Innovation Architects (DIA), Sizemore Group (Sizemore), and IBI Placemaking (formerly CRJA), has completed a study related to a Strategic Plan for the Future Use of Chilhowee Park & Exposition Center. The intent of the Strategic Plan is to guide the future direction and growth of Chilhowee Park and Exposition Center and its leaseholders—The Muse, Tennessee Valley Fair, and Golden Gloves Charities—in conjunction with the existing development plans of Zoo Knoxville, Magnolia Avenue corridor, and Burlington redevelopment.

Chilhowee Park and Exposition Center has long-served the residents of Knoxville as a productive community asset and an important gathering place. For more than 100 years, Chilhowee Park and Exposition Center has been home to a wide diversity of events and visitors. A strength of the Park is its appeal to a broad diversity of event and activity types, visitors, user bases, tenants, and industry segments. Situated adjacent to Zoo Knoxville, Chilhowee Park and Exposition Center contains 81 acres and includes leasehold interests of The Muse, Tennessee Valley Fair, and Golden Gloves Charities.

The study and strategic planning process consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:

1. **PROJECT EXPERIENCE:** Project team experience with thousands of projects throughout the country involving event facilities/complexes, parks and greenspaces, recreation facilities, attractions, hospitality and mixed-use developments, and urban planning efforts.
2. **SITE VISITS & CHARETTES:** Local market visits at the outset and throughout the project, including community and site/facility tours, visual inspection of existing facilities and infrastructure, plus concept visioning charettes.
3. **BENCHMARKING:** Research and analysis of facility data and interviews conducted with 40+ competitive/comparable facilities and projects.
4. **OUTREACH:** Engagement with 100+ local individuals (stakeholders, user groups, and community members) through open house, focus group, and meeting forums.
5. **COMMUNITY SURVEY:** An web-based survey was conducted for the purpose of collecting opinions and information from Knoxville residents pertaining to the Strategic Plan Recommendations for the Future Use of Chilhowee Park and Exposition Center. A total of 2,009 completed surveys were received.
6. **TELEPHONE INTERVIEWS:** Completed telephone interviews with past, current and new user candidates of a potential redeveloped Chilhowee Park & Exposition Center, representing more than 100 potential events.

1. INTRODUCTION: Acknowledgements

The Project Team would like to thank the following individuals and organizations for their participation in this strategic planning effort:

LEADERSHIP, TENANTS & PARTNERS

- City of Knoxville
- Knoxville City Council
- SMG, now ASM Global
- Spectra
- KGIS – Knoxville/Knox County Geographic Information System
- The Muse
- Tennessee Valley Fair
- Golden Gloves Boxing
- Zoo Knoxville

HOSPITALITY & TOURISM

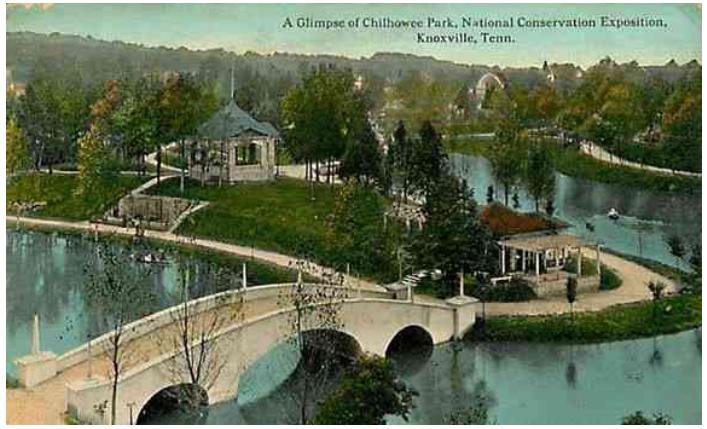
- Visit Knoxville
- SMG Sales Team
- Knoxville Chamber
- East Tennessee History Center
- Public Building Authority
- Knoxville Area Transit
- Knoxville Botanical Gardens
- Greater Knoxville Hospitality Association
- Knoxville/ Knox County Planning
- Knox Heritage
- Arts and Culture Alliance
- AC Entertainment
- Beck Cultural Center

COMMUNITY ORGANIZATIONS

- East Knoxville Business and Professional Association
- East Knoxville Community Meeting
- Burlington Residents Association
- Chilhowee Park Neighborhood Association
- Town Hall East
- Parkridge Community Organization

MEETING PLANNERS & USER GROUPS

- ROCCK Racing
- National Street Rod Association
- Vintage Market Days
- RK Gun Shows
- Remote Area Medical



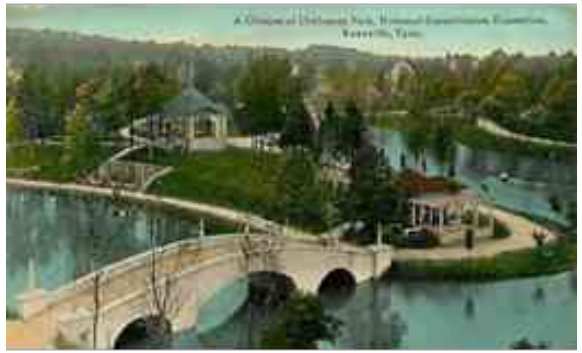
2
SITUATION ANALYSIS

2. SITUATION ANALYSIS: Chilhowee Park Overview

Chilhowee Park is an 81-acre, multi-use venue owned by the City of Knoxville and located approximately four miles northeast of downtown Knoxville between Magnolia Avenue and Interstate 40. In 1910 and 1911, Chilhowee Park hosted the first two Appalachian Expositions, which were held to demonstrate progress in Southern Industry. The expositions featured a Tennessee marble bandstand, which is the only remaining structure on the site.

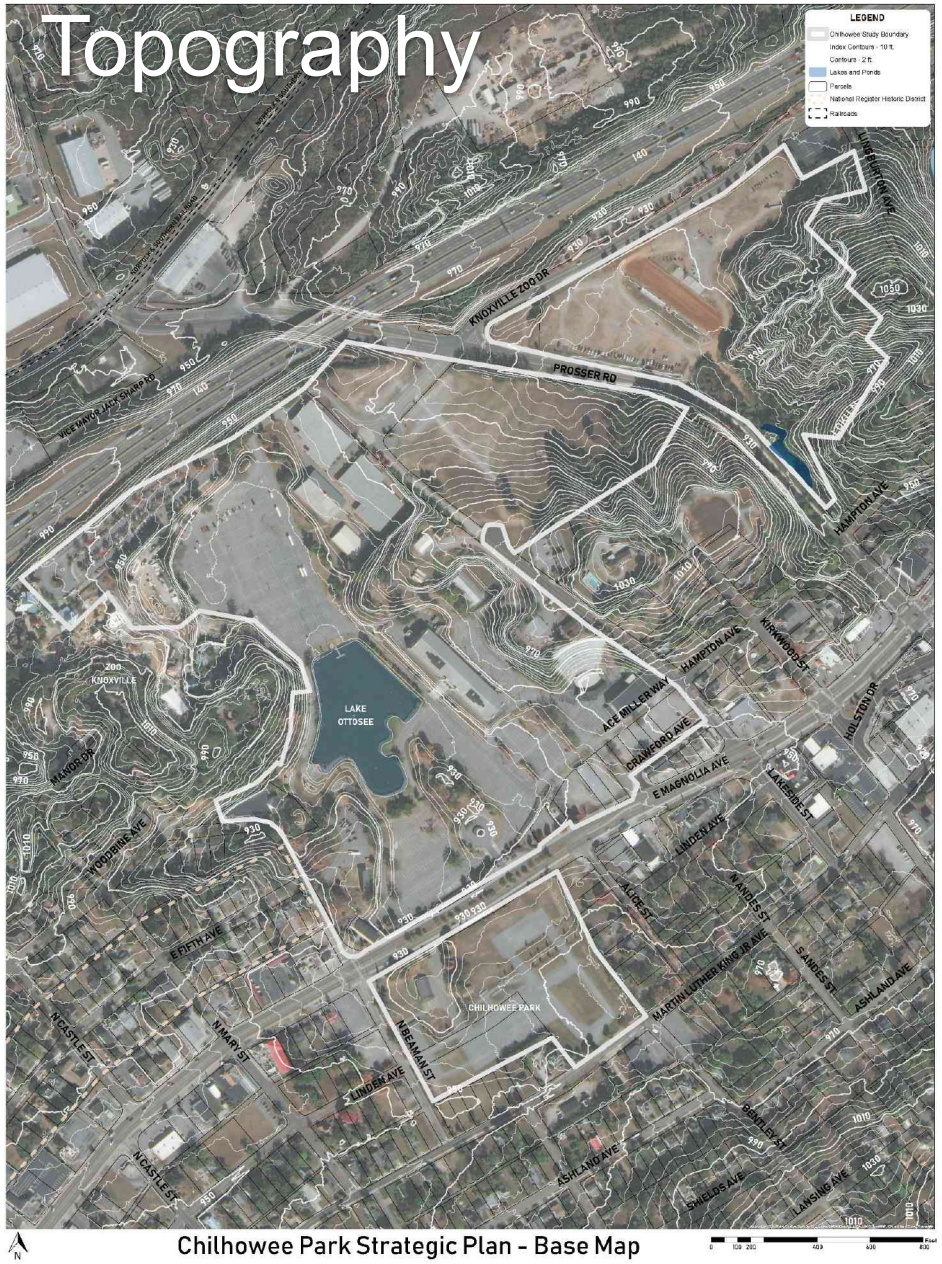
SMG manages the property, which currently consists of the three-acre Lake Ottosee, the 57,100-square foot Jacob Building exhibition hall, the 4,500-seat Homer Hamilton Amphitheater, 70,000 square feet of covered/open-air barns and pavilions for agricultural events and a 14-acre tractor pull area. Chilhowee Park also is the home to The Muse Knoxville, a children's science museum focusing on science, technology, engineering, art, and math (STEAM) educational opportunities; the Ace Miller Golden Gloves Arena located in the Kerr Building, two open air picnic pavilions and administrative offices. Zoo Knoxville sits on land adjacent to Chilhowee Park, which is also owned by the City.

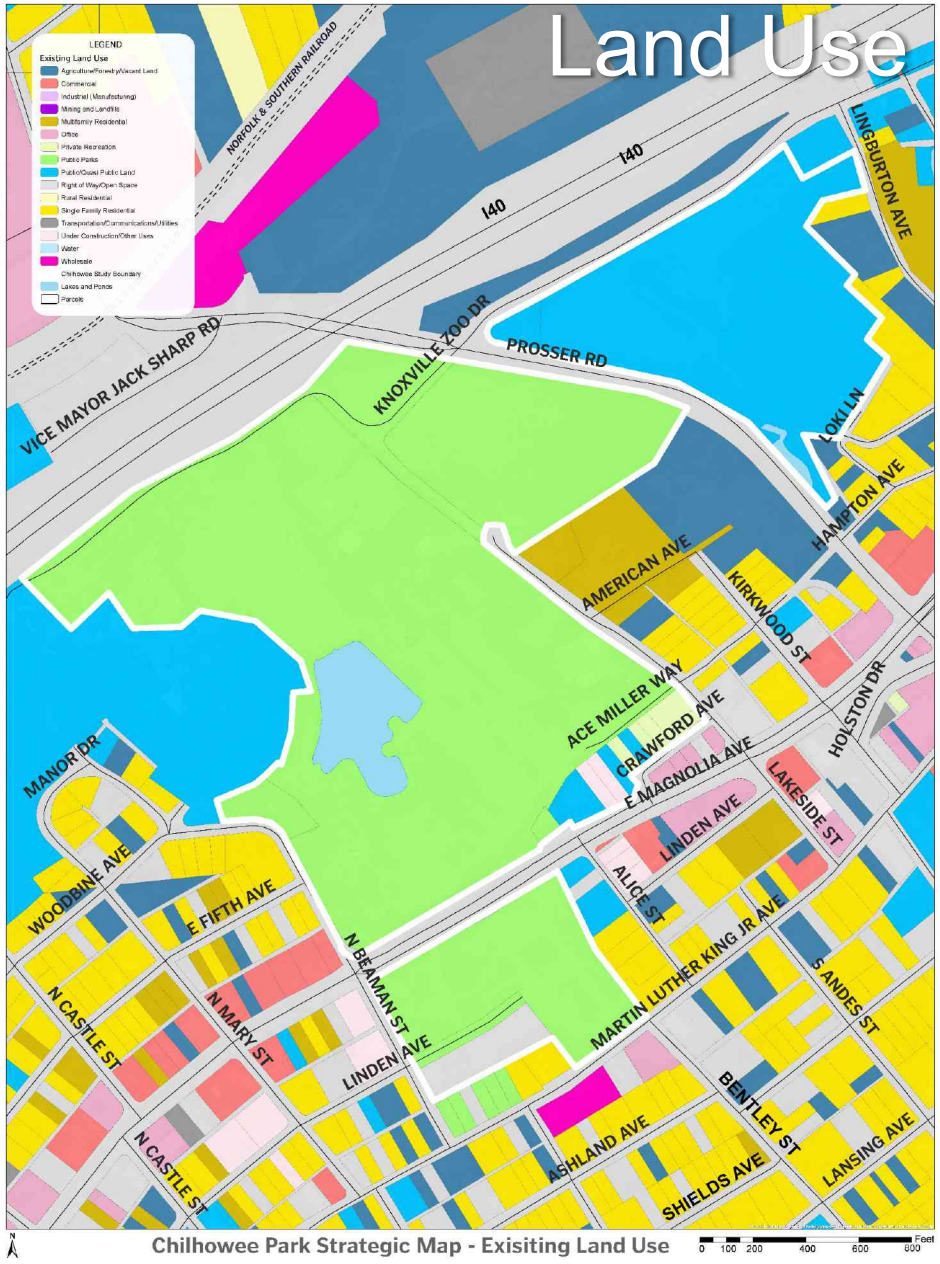
The Tennessee Valley Fair has a 100-year history in the City and has been a partner at the Park for several years, and owns certain property parcels within and adjacent to Chilhowee Park. The TVF retains exclusive operating rights for Chilhowee Park for three weeks in September to host their 10-day fair, that historically has attracted nearly 150,000 attendees annually.



2. SITUATION ANALYSIS:

Land Use





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Land Use
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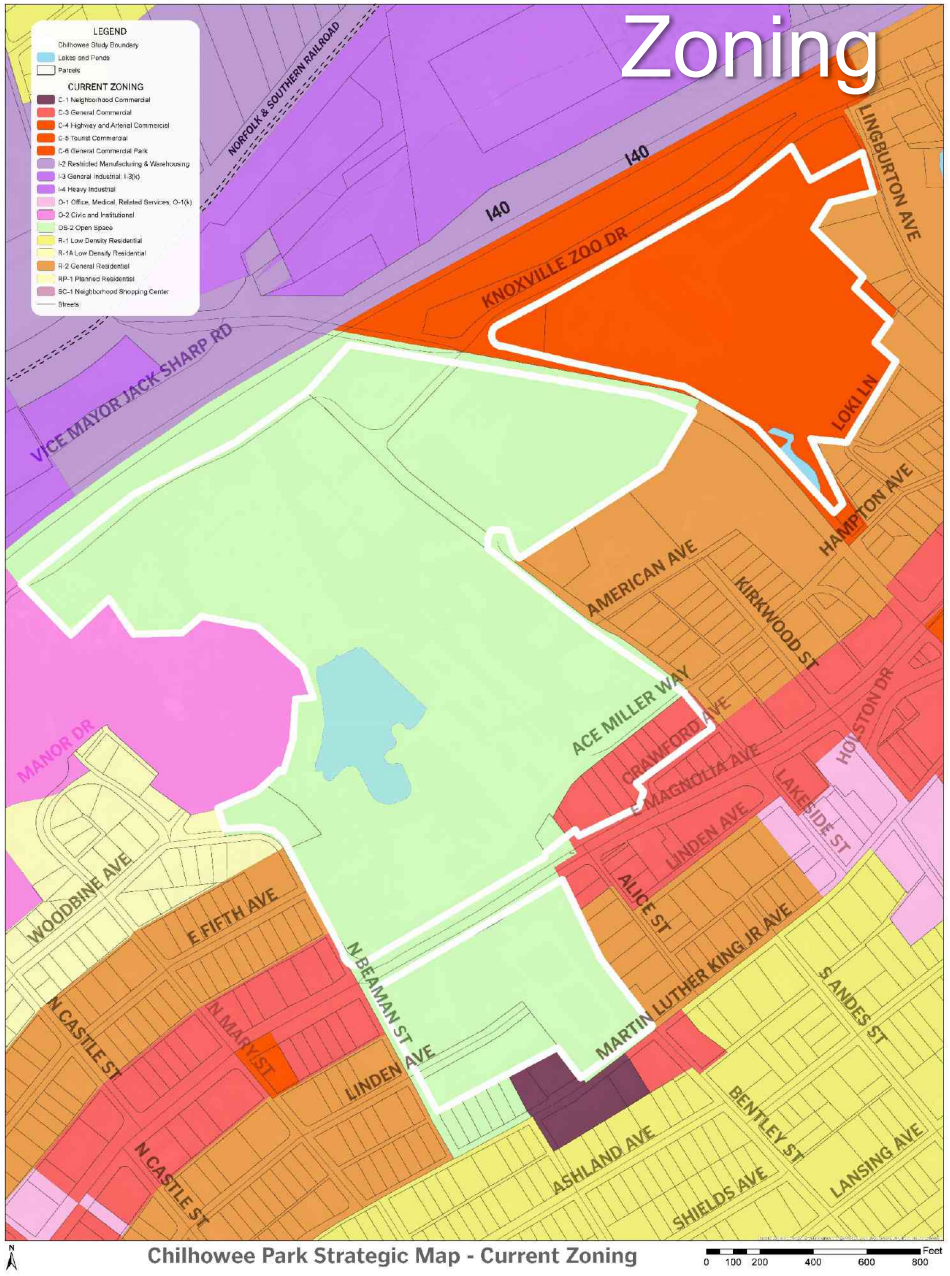
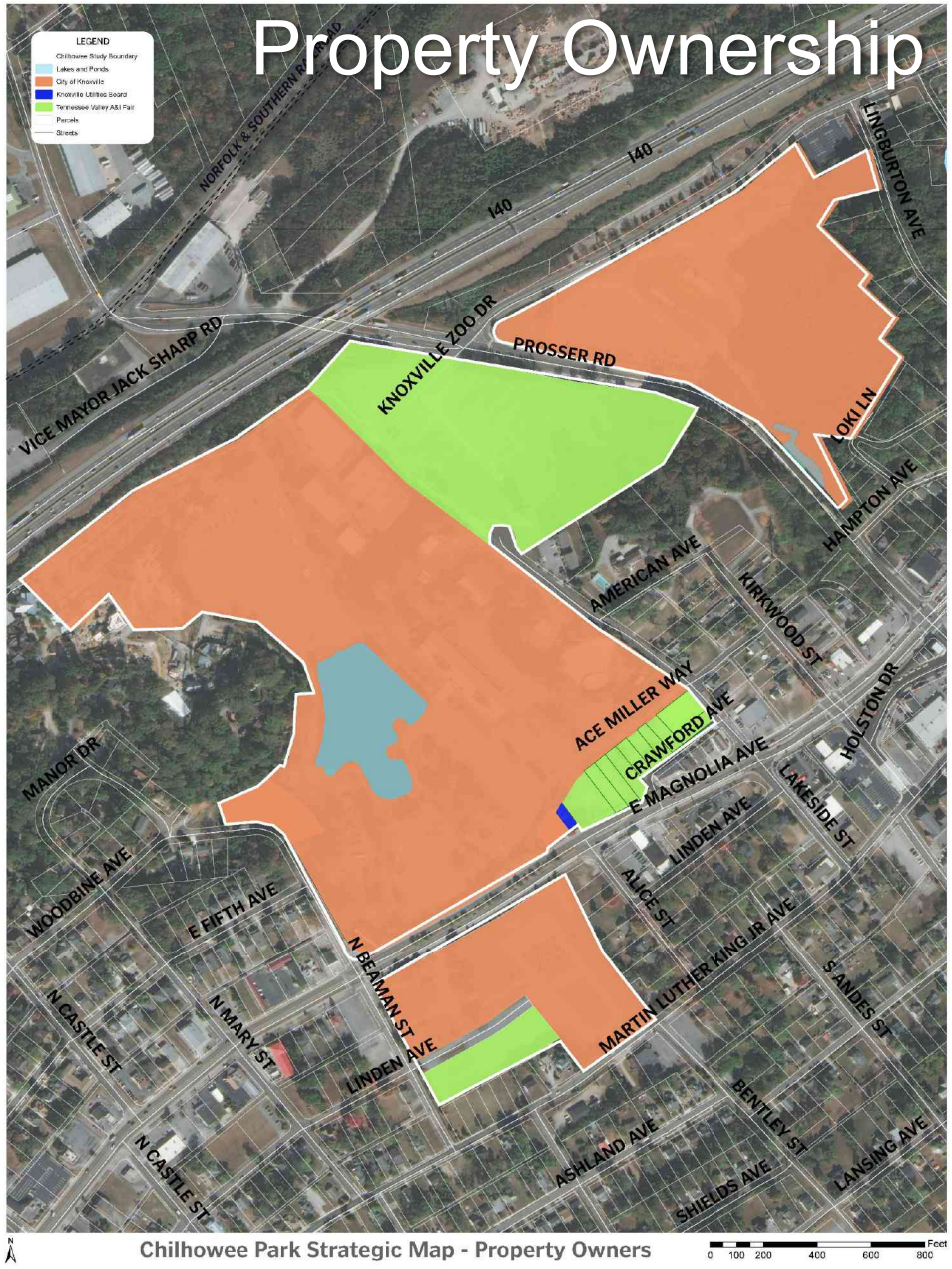
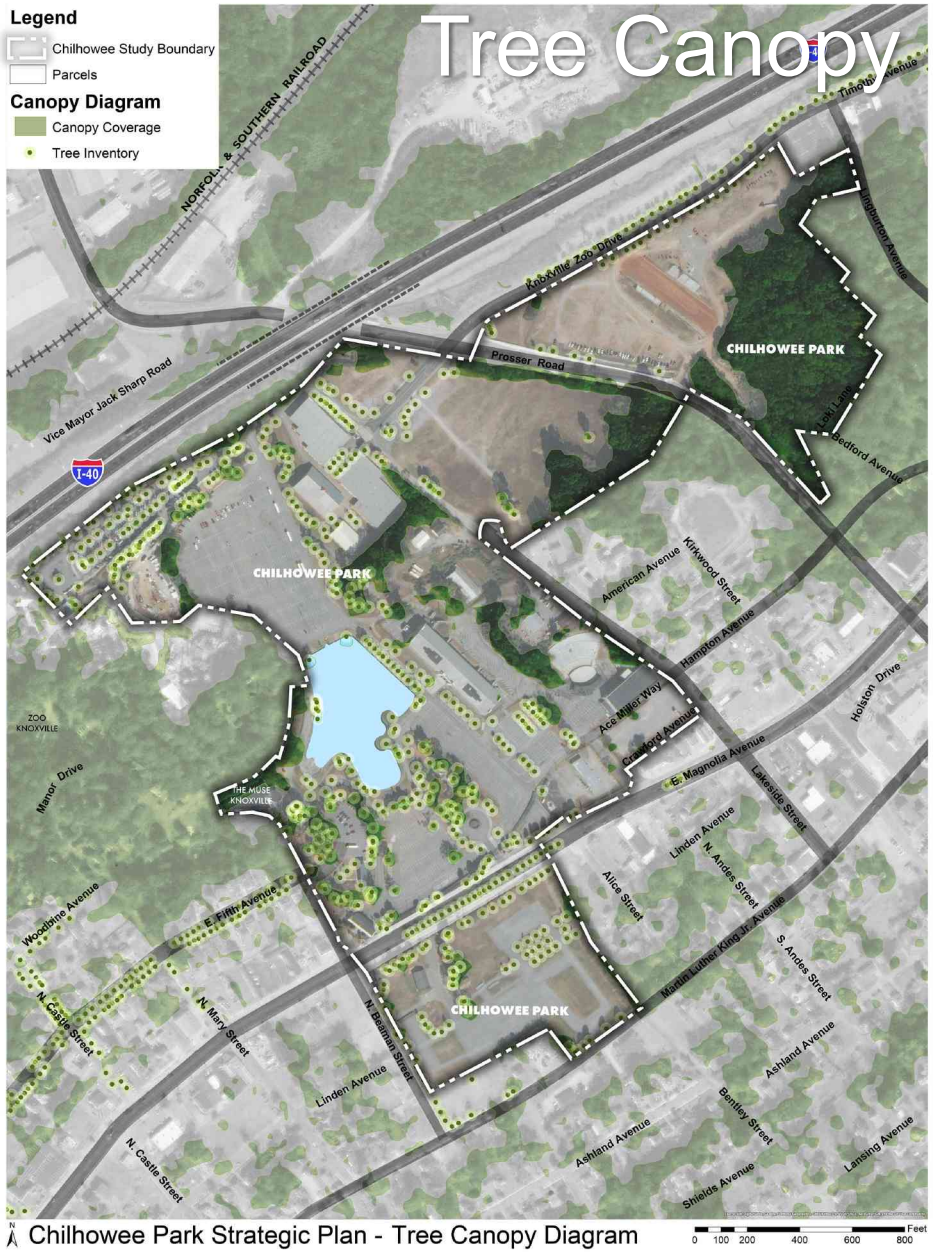
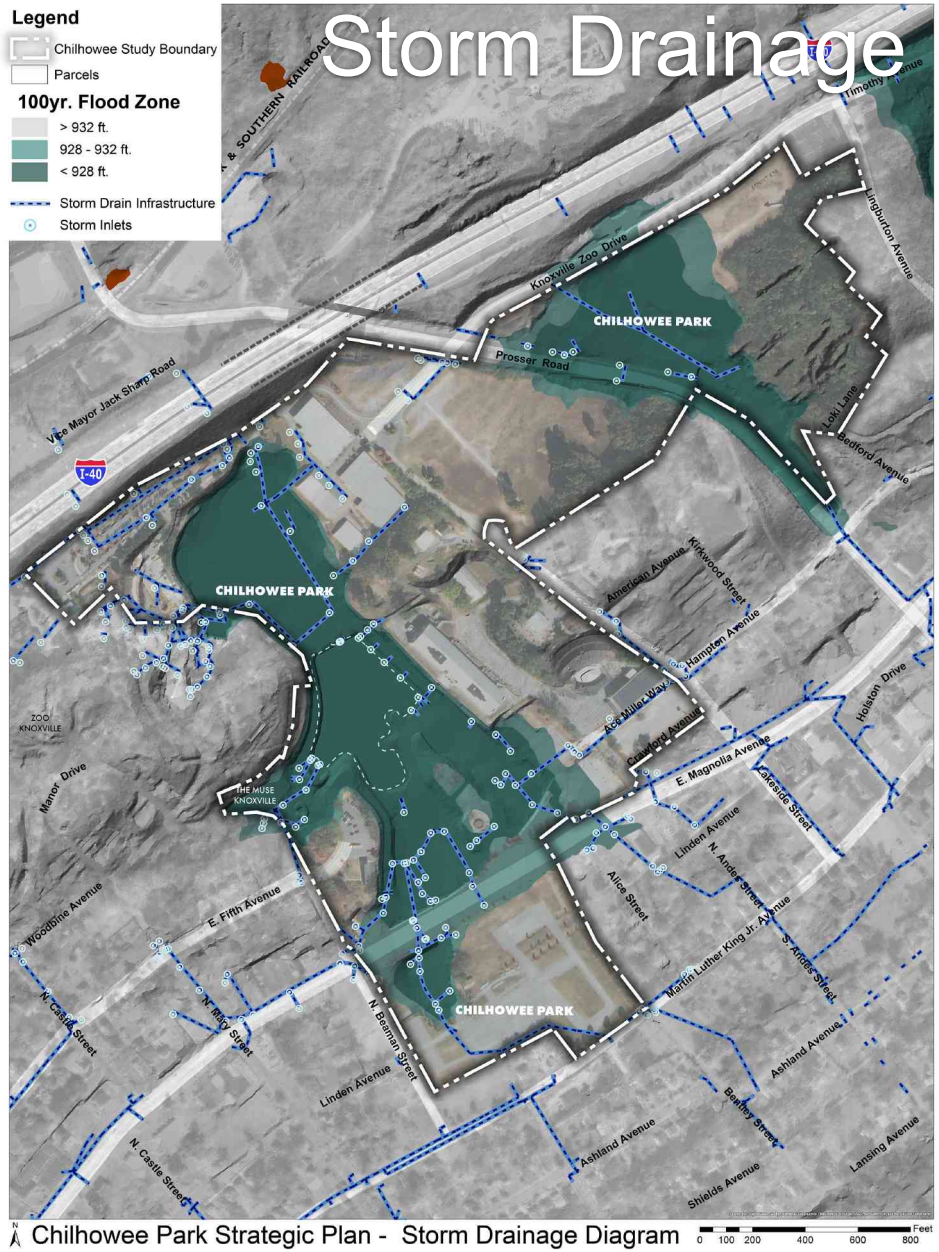




2. SITUATION ANALYSIS:

Landscape





2. SITUATION ANALYSIS:

Landscape
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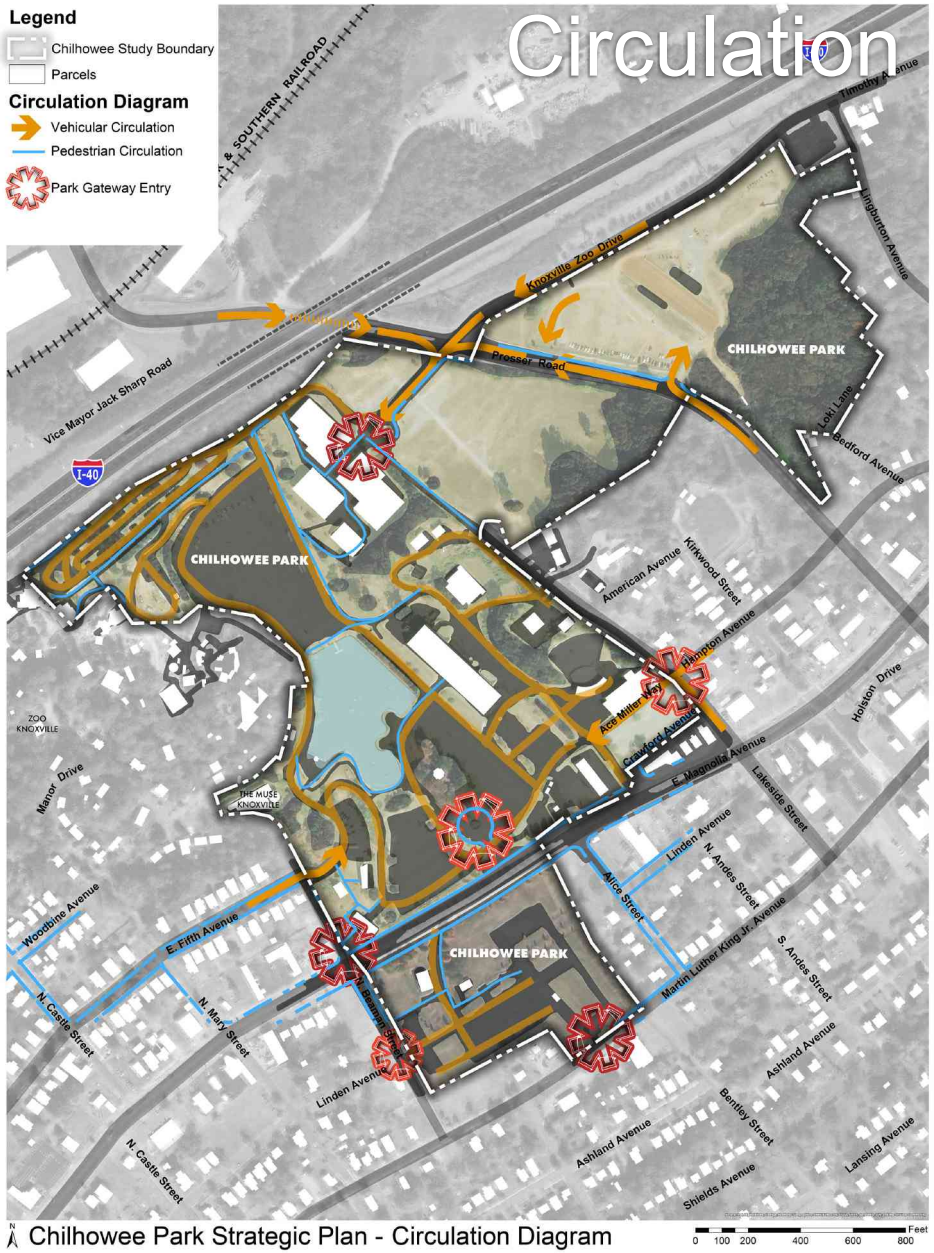

2. SITUATION ANALYSIS:

Landscape
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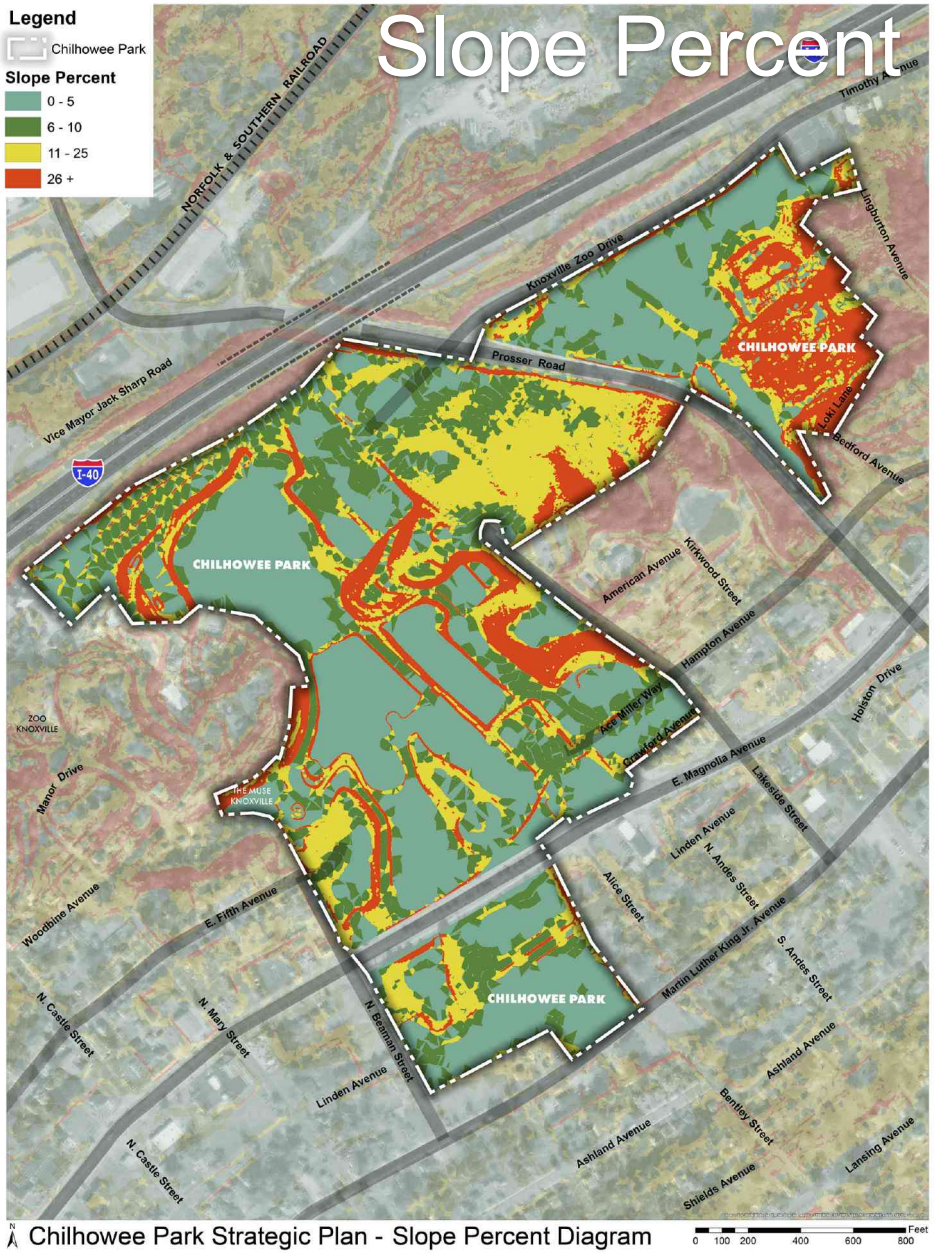
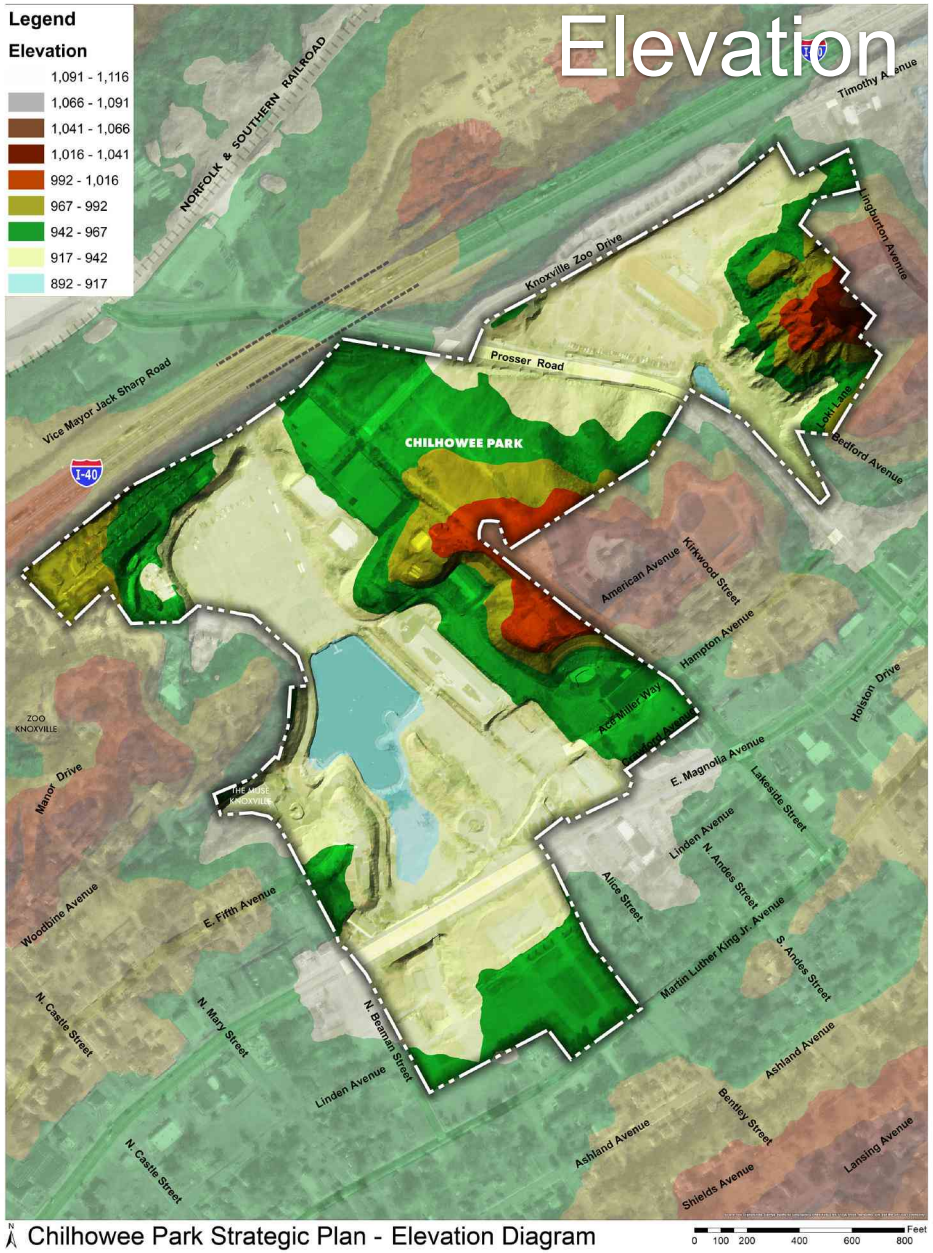
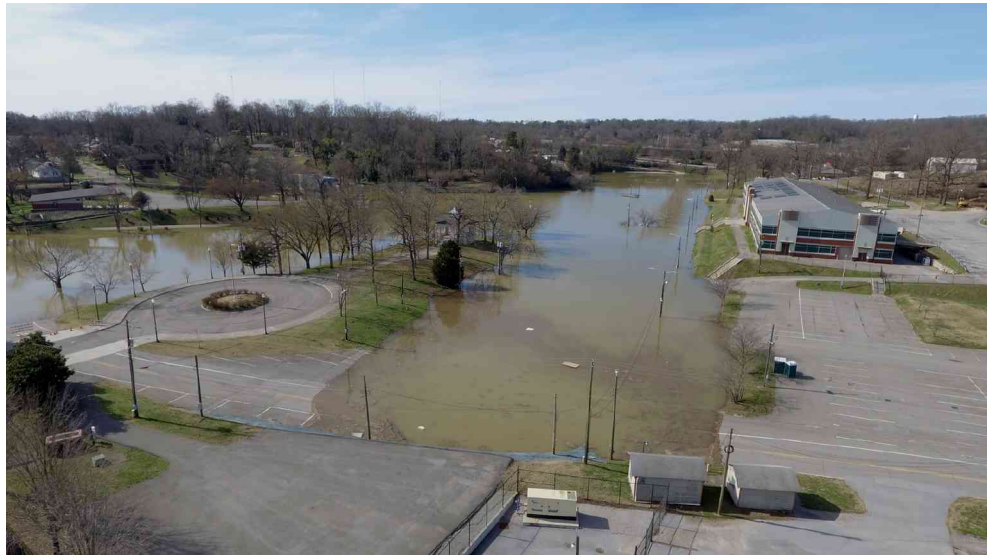
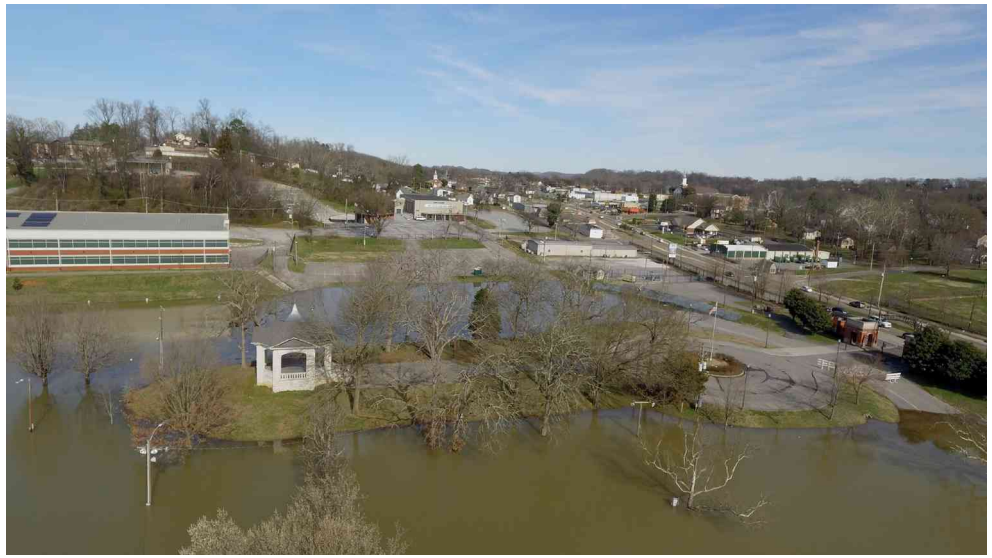




2. SITUATION ANALYSIS:
Flooding





2. SITUATION ANALYSIS:

Flooding
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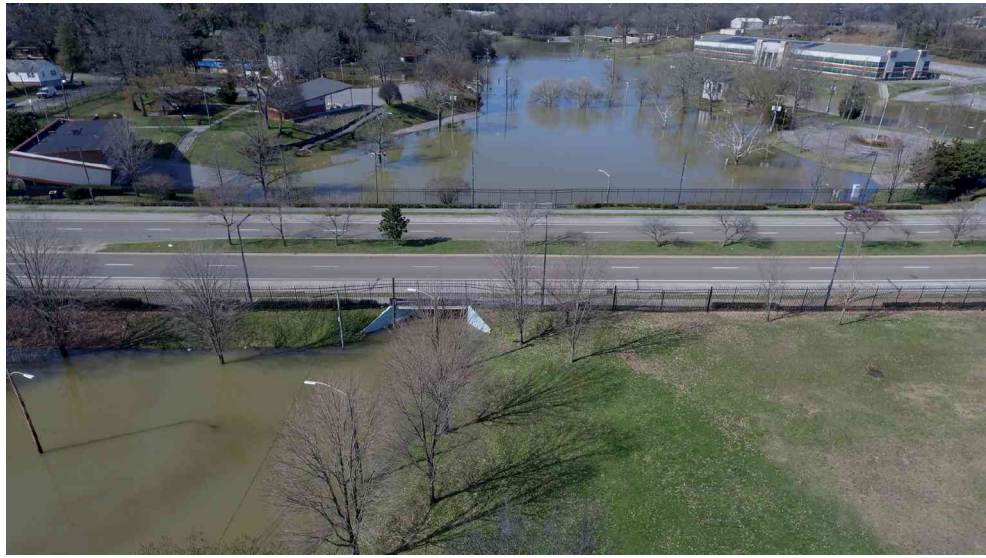

2. SITUATION ANALYSIS:
TN Valley Fair

2. SITUATION ANALYSIS:

TN Valley Fair

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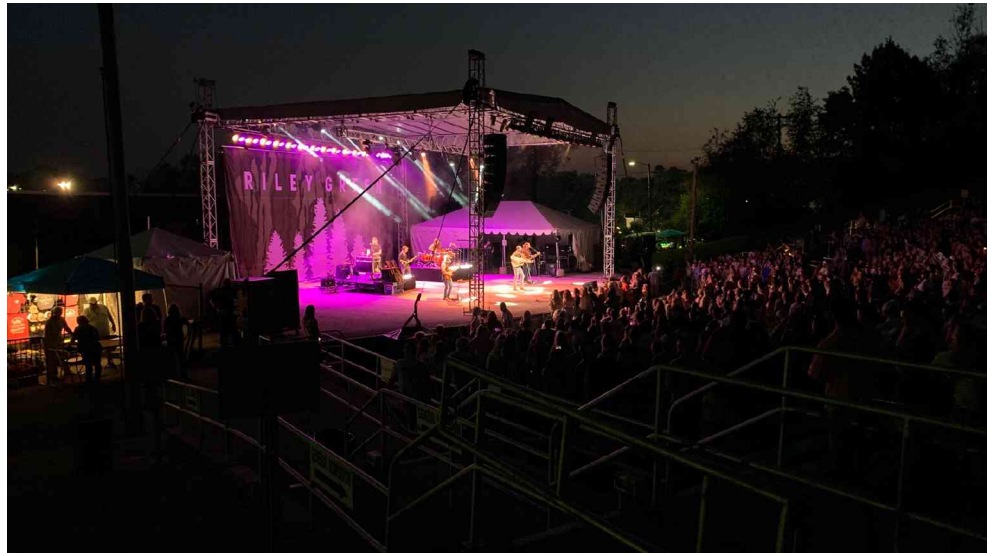
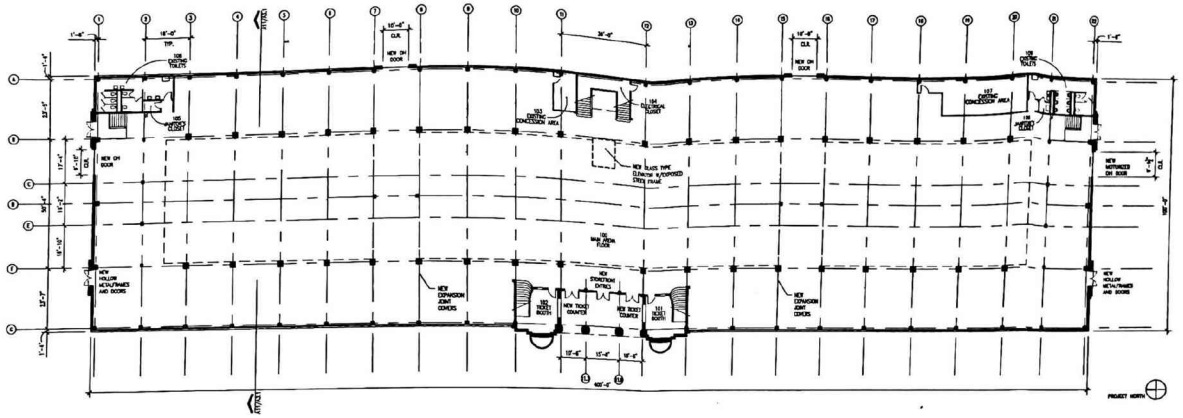
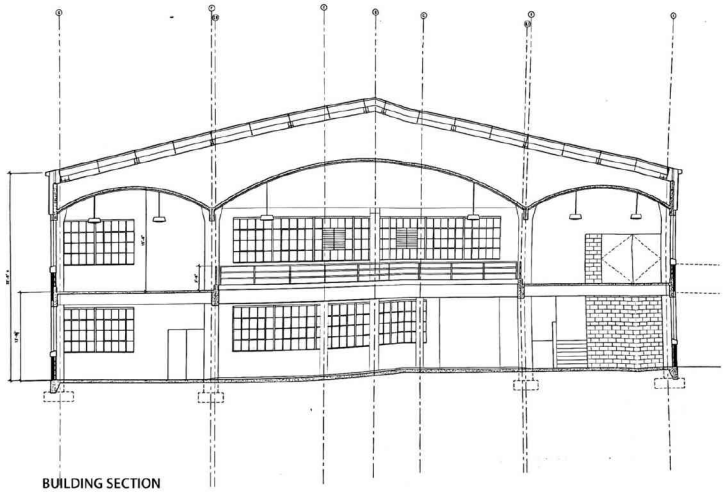


2. SITUATION ANALYSIS:

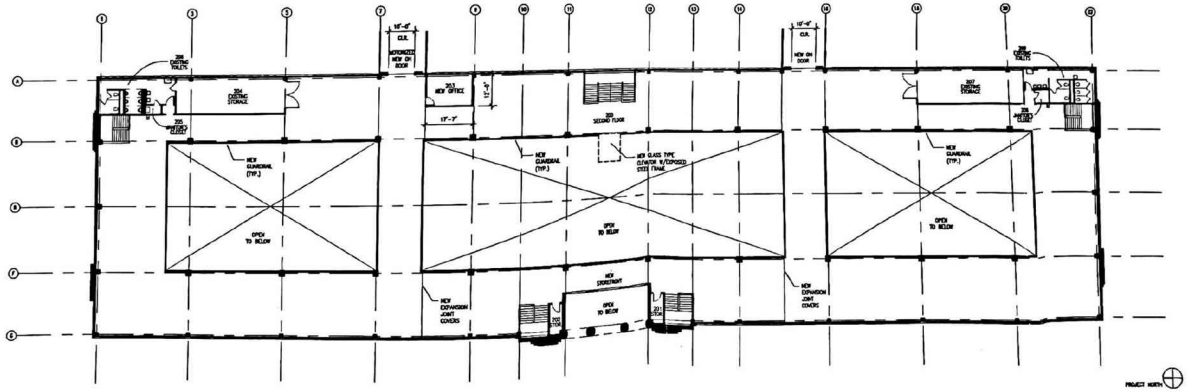
Jacob Building



MAIN LEVEL FLOOR PLAN

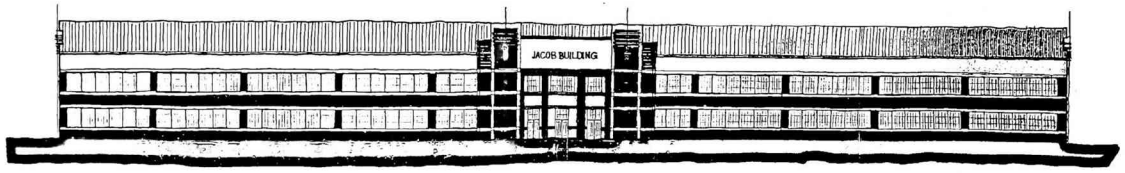


BUILDING SECTION



UPPER LEVEL FLOOR PLAN

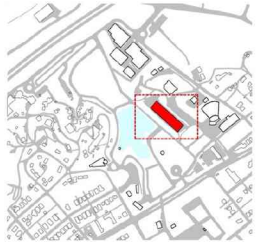
MAIN ENTRANCE
ALTERNATE ENTRANCE



FRONT VIEW OF BUILDING

JACOB BUILDING

CURRENT USE:	EXHIBITIONS
TOTAL AREA:	57,100 SF
GROUND FLOOR SPACE:	36,600 SF
UPPER FLOOR SPACE:	20,500 SF
CURRENT BUILDING CONDITION:	GOOD
BUILDING CODE ISSUES:	ADA ACCESSIBILITY; GUARD AND STAIR RAILINGS
SUSTAINABILITY IMPROVEMENTS NEEDED:	CATERING KITCHEN; ELEVATOR
SUGGESTED AESTHETIC IMPROVEMENTS:	WINDOWS; EXTERIOR & INTERIOR PAINT SCHEME; EXTERIOR & INTERIOR LIGHTINGS; SKYLIGHTS OR ROOF MONITORS
POTENTIAL FUTURE USES:	MUSE



2. SITUATION ANALYSIS:

Jacob Building
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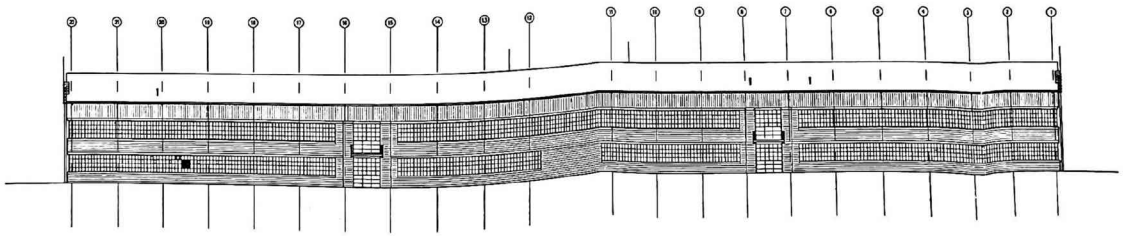
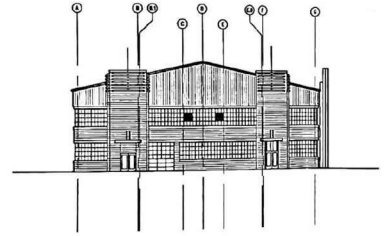
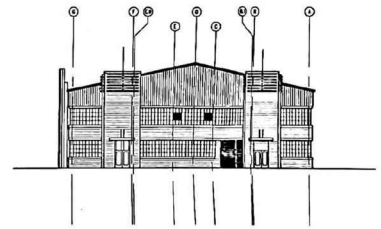


REAR ELEVATION



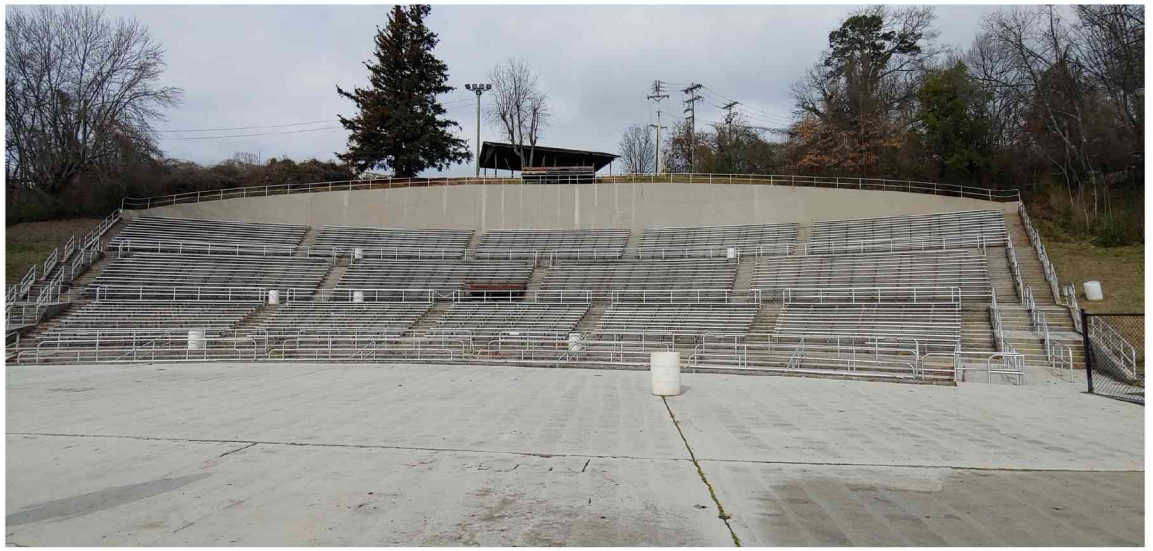
NORTH SIDE ELEVATION

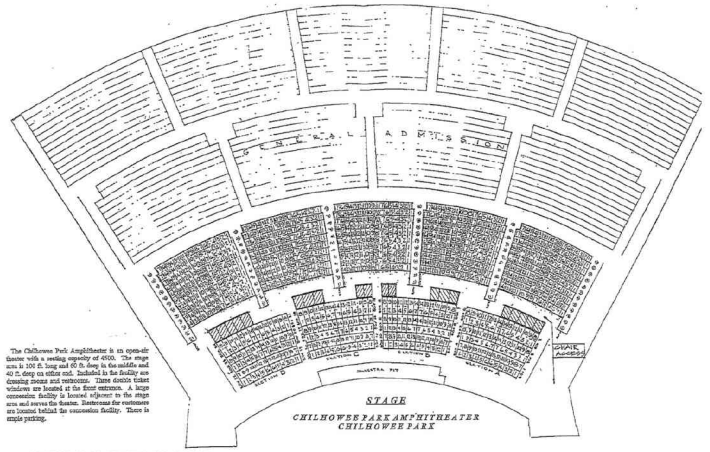


SOUTH SIDE ELEVATION

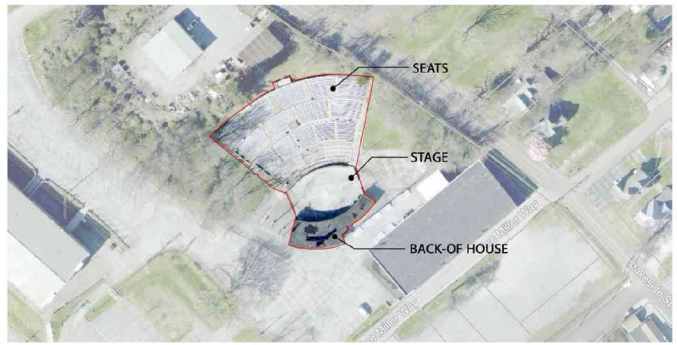
2. SITUATION ANALYSIS:

Homer Hamilton Amphitheatre



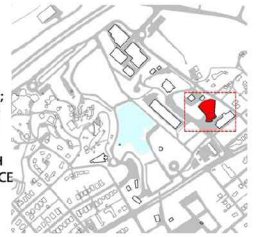


AMPHITHEATER SEATS LAYOUT
N.T.S.



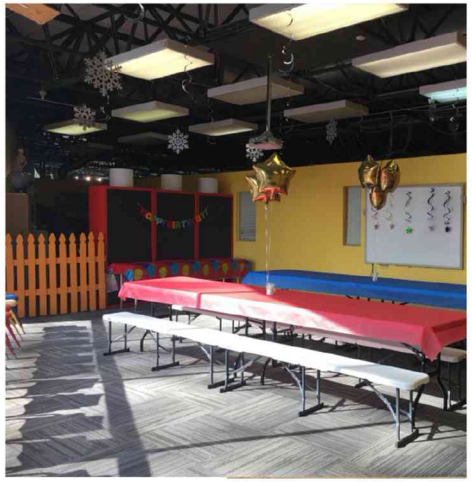
HOMER HAMILTON AMPHITHEATRE

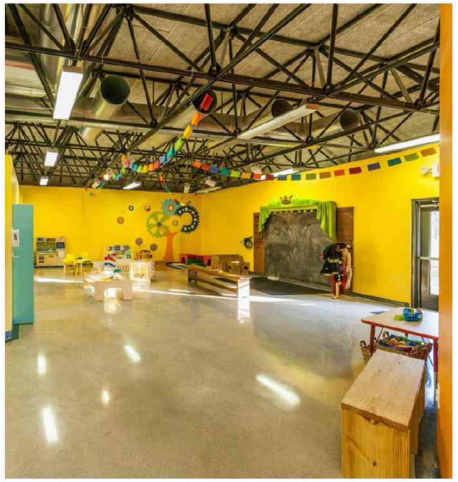
CURRENT USE:	OUTDOOR PERFORMANCE VENUE
BACK-OF-HOUSE AREA:	3,700 SF
SEATS:	4,500
STAGE AREA:	100' x 60' (40' AT ENDS)
CURRENT BUILDING CONDITION:	FAIR
BUILDING CODE ISSUES:	ADA ACCESSIBILITY; GUARD AND RAILINGS
SUSTAINABILITY IMPROVEMENTS NEEDED:	BACK-OF-HOUSE TOTAL RENOVATION; COVERED STAGE; LIGHTING & SOUND CONTROL PLATFORM; SEAT BENCH; S EATING AREA PAINT; LIGHTING; IMPROVE ENTRANCE & TICKET BOOTH AREA; IMPROVE STAGE FLOOR SURFACE
SUGGESTED AESTHETIC IMPROVEMENTS:	PAINT RED BRICK OR RESURFACE WITH ALTERNATE MATERIAL; PARK THEME DESIGN

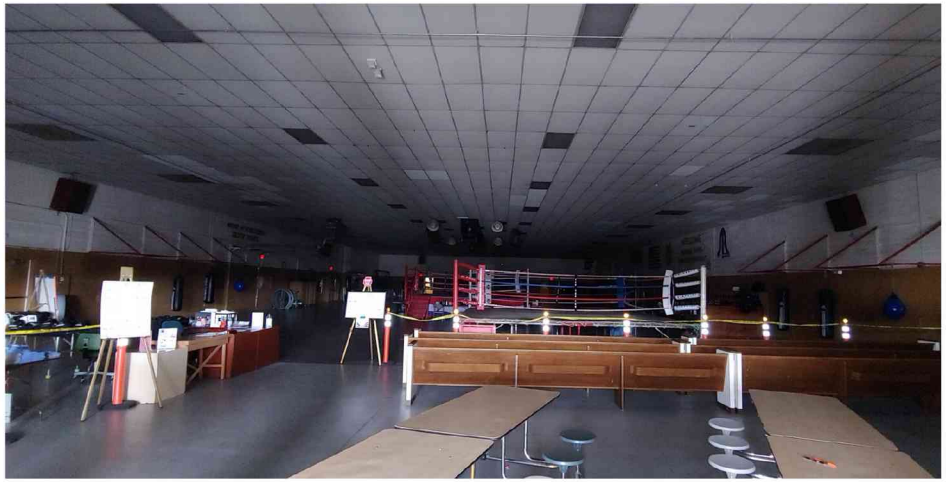


2. SITUATION ANALYSIS:

Kerr and Muse Buildings

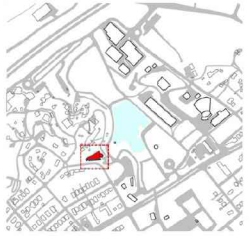






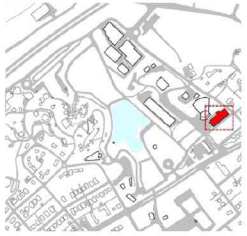
MUSE BUILDING

CURRENT USE:	MUSE (YOUTH EDUCATION)
TOTAL AREA:	10,800 SF (4,000 SF EXHIBIT SPACE)
CURRENT BUILDING CONDITION:	GOOD
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	IMPROVE ENTRANCE DROP-OFF/ PICK-UP AREA
SUGGESTED AESTHETIC IMPROVEMENTS:	EXTERIOR IMAGE; LIGHTING; FRONT STAIRS; FENCING



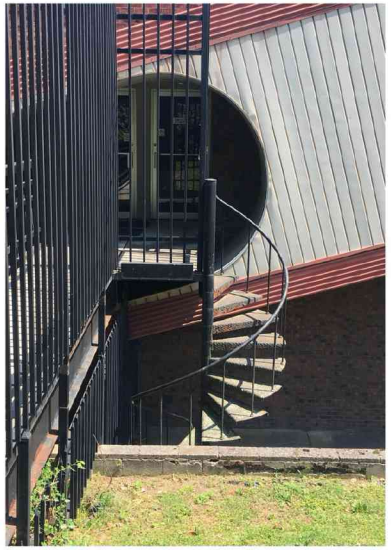
KERR BUILDING -- "ACE" MILLER GOLDEN GLOVES ARENA

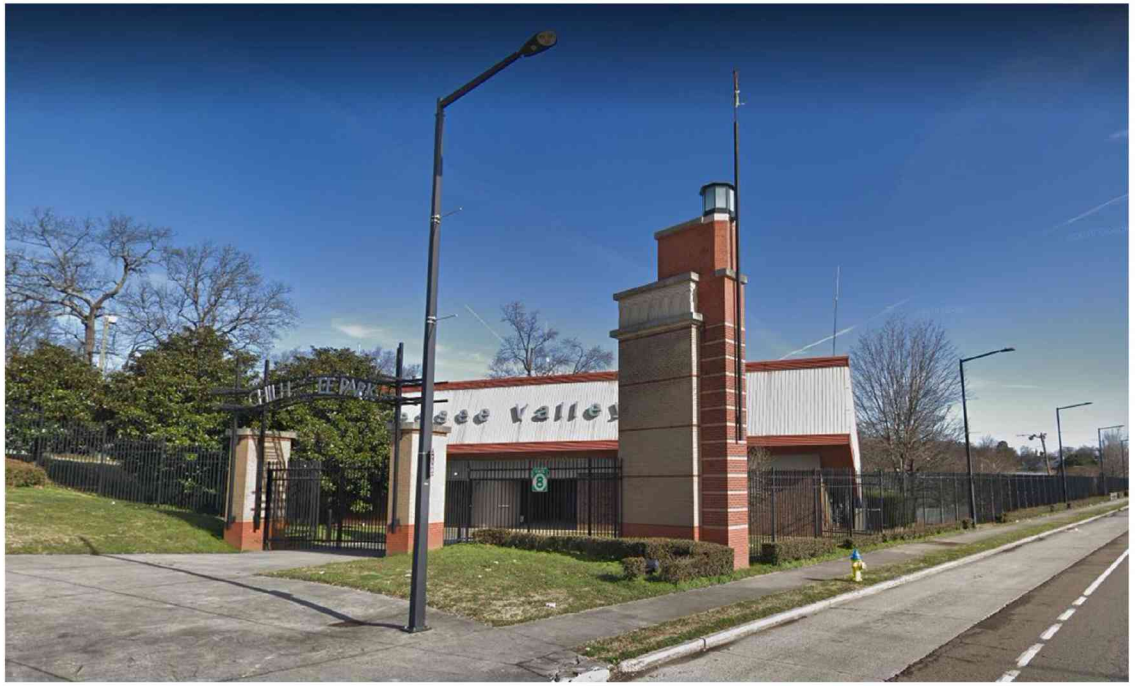
CURRENT USE:	BOXING TRAINING & TOURNAMENTS; EXHIBITIONS; YOUTH DEVELOPMENT
GROUND FLOOR AREA:	16,000 SF
CURRENT BUILDING CONDITION:	FAIR
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	BUILDING ENVELOP IMPROVEMENTS; GENERAL INTERIOR IMPROVEMENTS; TOILET/LOCKER ROOM IMPROVEMENTS; NEW HVAC; NEW LIGHTING; FOOD SERVICES IMPROVEMENT
SUGGESTED AESTHETIC IMPROVEMENTS:	EXTERIOR IMAGE; PARK THEME DESIGN



2. SITUATION ANALYSIS:

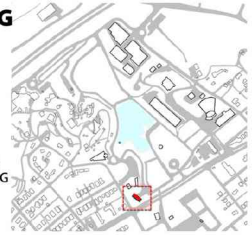
Fair Office Building





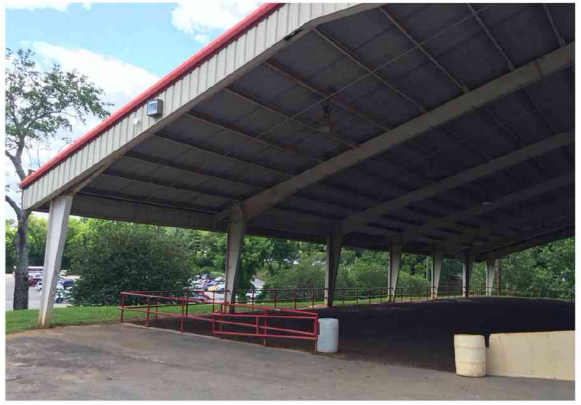
TENNESSEE VALLEY FAIR OFFICE BUILDING

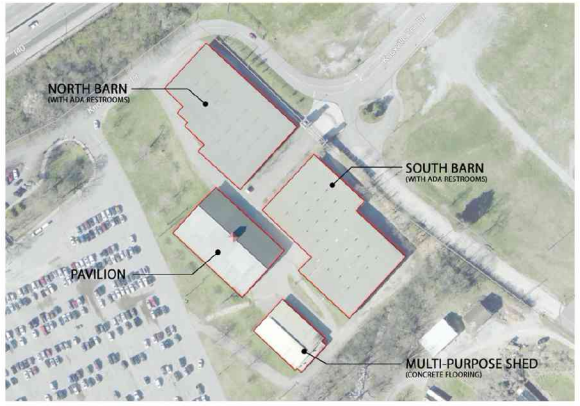
CURRENT USE:	OFFICE
TOTAL AREA:	5,000 SF
GROUND FLOOR AREA:	2,500 SF
UPPER FLOOR AREA:	2,500 SF
CURRENT BUILDING CONDITION:	FAIR
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	EXTERIOR ENVELOPE IMPROVEMENT; MECHANICAL, ELECTRICAL, PLUMBING IMPROVEMENTS
SUGGESTED AESTHETIC IMPROVEMENTS:	TOTAL IMAGE CHANGE

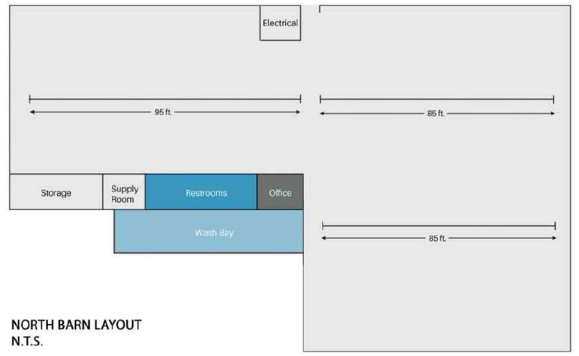


2. SITUATION ANALYSIS:

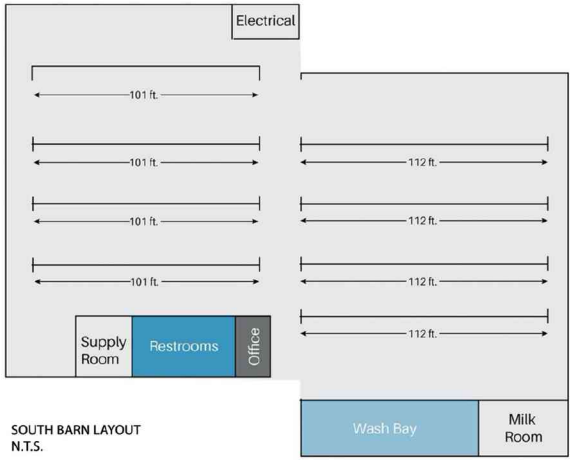
Livestock Barns & Facilities







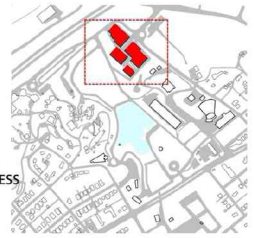
NORTH BARN LAYOUT
N.T.S.



SOUTH BARN LAYOUT
N.T.S.

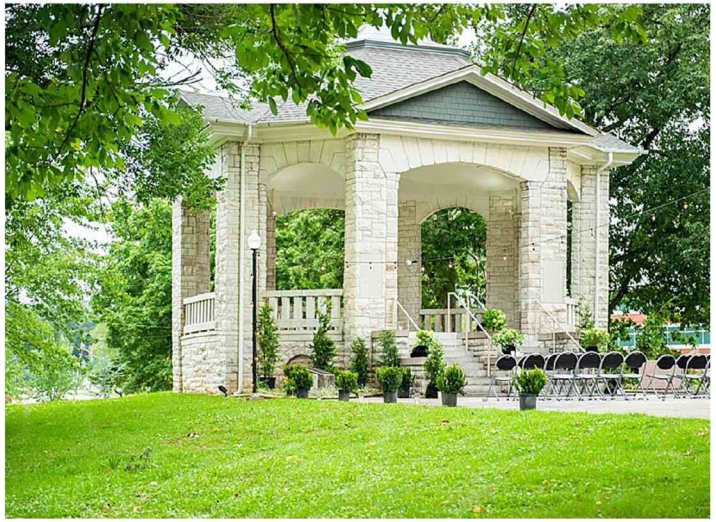
LIVESTOCK BARNS

CURRENT USE:	LIVESTOCK EXHIBITIONS; OFF-SEASON RC MODEL CAR RACING
BUILDING AREAS:	
NORTH BARN:	23,165 SF
SOUTH BARN:	31,476 SF
PAVILION:	10,650 SF W/ SEATING FOR 1,000
MULTI-PURPOSE SHED:	7,296 SF
TOTAL COVERED FLOOR AREA:	70,000 SF
CURRENT BUILDING CONDITION:	FAIR
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	NEW GUTTERS & DOWNSPOUTS; DRAINAGE AWAY FROM BUILDING; REPLACE CLAY FLOOR WITH DUSTLESS MATERIAL; IMPROVED LIGHTING
SUGGESTED AESTHETIC IMPROVEMENTS:	PARTIAL OR FULL ENCLOSURE; PARK THEME DESIGN; LIGHTING



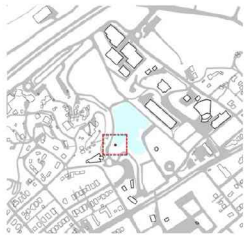
2. SITUATION ANALYSIS:

Bandstand & Lakeside Amphitheatre



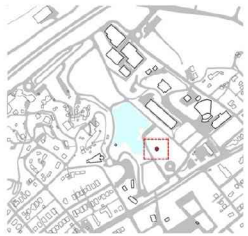
LAKESIDE AMPHITHEATRE

CURRENT USE:	OUTDOOR PERFORMANCE VENUE
COVERED AREA:	300 SF
AMPHITHEATRE AREA:	5,000 SF
CURRENT BUILDING CONDITION:	FAIR
BUILDING CODE ISSUES:	NONE
SUSTAINABILITY IMPROVEMENTS NEEDED:	LIGHTING
SUGGESTED AESTHETIC IMPROVEMENTS:	PAINT SCHEME; STAIN CONCRETE



BANDSTAND

CURRENT USE:	WEDDINGS
COVERED AREA:	1,400 SF
CURRENT BUILDING CONDITION:	GOOD
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	NEW SLATE ROOF; LIGHTING
SUGGESTED AESTHETIC IMPROVEMENTS:	FESTIVE LIGHTING

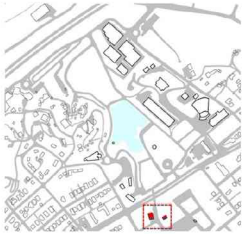


2. SITUATION ANALYSIS:

Main Campus & Midway Pavilions

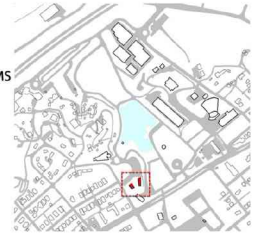
MIDWAY RESTROOM & PAVILION

CURRENT USE:	PICNIC SHELTER AND RESTROOMS
COVERED AREA:	3,600 SF + 1,300 SF
CURRENT BUILDING CONDITION:	GOOD
BUILDING CODE ISSUES:	ADA ACCESSIBILITY;
SUSTAINABILITY IMPROVEMENTS NEEDED:	NEW ROOF; LIGHTING
SUGGESTED AESTHETIC IMPROVEMENTS:	PARK THEME DESIGN; PAINT SCHEME



PAVILION & RESTROOM

CURRENT USE:	PICNIC SHELTER AND RESTROOMS
COVERED AREA:	1,700 SF + 2,200 SF
CURRENT BUILDING CONDITION:	GOOD
BUILDING CODE ISSUES:	NONE
SUSTAINABILITY IMPROVEMENTS NEEDED:	SIGNAGE IMPROVEMENT; NEW ROOF; LIGHTING
SUGGESTED AESTHETIC IMPROVEMENTS:	PARK THEME DESIGN; PAINT SCHEME



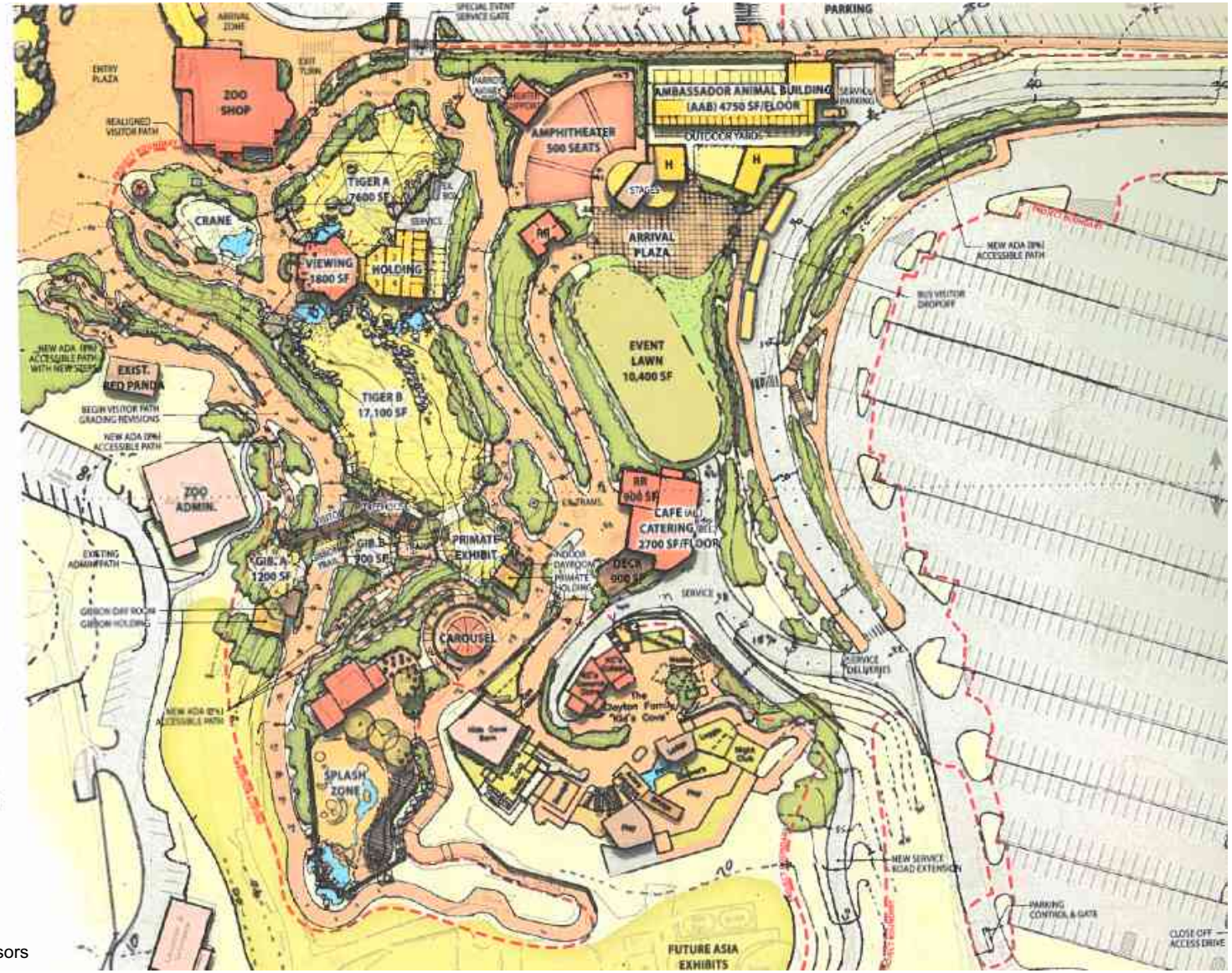
2. SITUATION ANALYSIS:

Zoo Knoxville Master Plan

EAST CAMPUS

Amphitheater, Ambassador Animal Building, Event Plan Enlargement

PROGRAM AREA	EXISTING	PROPOSED
Tiger Viewing		1,800 SF
Tiger Holding		2,300 SF
Tiger Habitat A		7,600 SF
Tiger Habitat B		17,100 SF
Treehouse		400 SF
Crane Exhibit		1,900 SF
Gibbon Habitat A		1,200 SF
Gibbon Habitat B		900 SF
Gibbon Indoor Dayroom		200 SF
Gibbon Viewing		300 SF
Gibbon Holding		350 SF
Primate Habitat		2,000 SF
Primate Holding		300 SF
Primate Indoor Dayroom		200 SF
Theater Support		600 SF
Amphitheater Seating	3,000 SF	6,000 SF
Amph. Show/Support+Stage		900 SF
Amph. Show Holding	800 SF	1,800 SF
Ambassador Animal Building	1,400 SF	4,750 SF/Floor
Small Mammal Holding		940 SF
Parrot Aviary		500 SF
Arrival Plaza		5,600 SF
Event Lawn		10,400 SF
Cafe (Upper Level)		2,700 SF
Catering (Lower Level)		2,700 SF
Restroom	300 SF	900 SF
Future Asia Exhibits		66,600 SF
Existing Rhino	31,100 SF	
Parking		
West/North Parking Area Improvements		± 22 space reduction
East Parking Addition		± 51 space increase

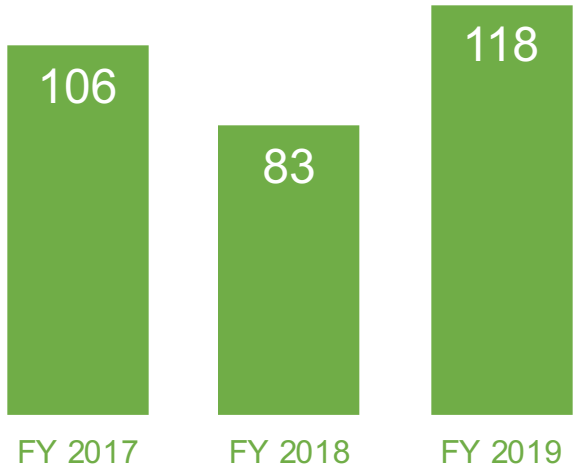


Source: CLR Design, Zoo Advisors

2. SITUATION ANALYSIS: Chilhowee Park Events

Overall event activity at Chilhowee Park has remained relatively consistent over the last three fiscal years. Much of the event activity is centered around hosting events such as Community/Civic events, Public Shows and SMERF (social, military, educational, religious and fraternal) events that typically require more cost-effective event space. The overall level of consistency across most event types provides some indication of a mature product with respect to the facility and related features of the destination. Future growth may require some element of change/improvement to these basic event facility amenities and services. Importantly, R.O.C.C.K. Racing event activity was separated out due both to the volatility of event activity and the limited impact these events have on facility operations or economic impacts.

NUMBER OF EVENTS



NUMBER OF EVENTS BY TYPE

Banquet	6	9	10
Community/Civic	30	14	9
Concert	4	3	3
Festival	4	4	3
Livestock	7	7	8
Meeting/Conference	7	7	27
Non-Tenant Sport	11	9	12
Public Show	17	14	16
SMERF	19	15	28
TN Valley Fair	1	1	1
TOTAL	**106**	**83**	**118**
R.O.C.C.K Racing	43	6	3
	FY 2017	FY 2018	FY 2019

Notes: Total data do not include R.O.C.C.K. Racing events.
Source: SMG Chilhowee Park, 2019

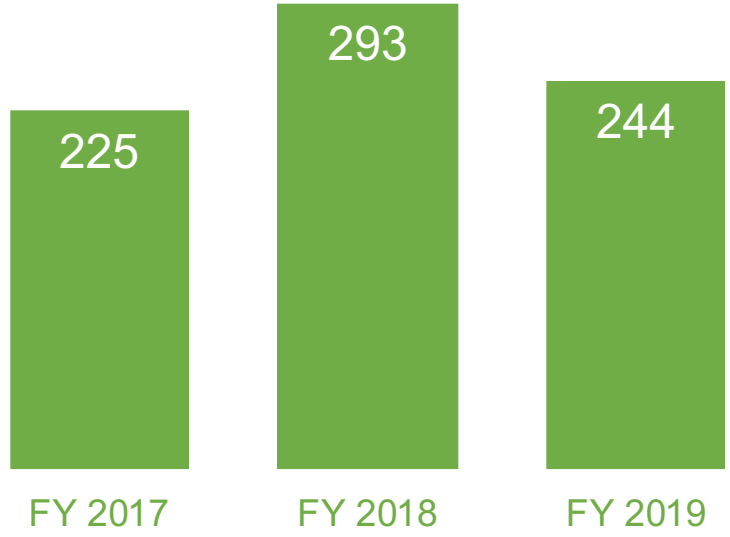
EVENT EXAMPLES

- Aguliar Wedding
- American Bantam Association
- American Cornhole Organization
- American Kiko Goats
- B.R.A.K.E.S. Driving School
- Beef and Sheep Expo
- Bubble Run 5K
- Chilhowee Park Neighborhood
- Disco Brawl
- East TN Rabbit and Cavy
- East TN Racers' Auction
- Foothills Craft Show
- Friends of the Library
- Hope Fellowship Church
- Huerta Quinceanera
- KAT (Knoxville Area Transit)
- Knox County Humane Society
- Knox County Schools College Fair
- Knoxville Car Enthusiasts
- Kubota Training
- Lil' Uzi Vert Concert
- R.K. Gun Show
- R.O.C.C.K. Racing
- Smoky Mountain Dairy Goat
- Smoky Mountain Hospice
- STEAM Carnival
- Tennessee Valley Fair
- Vintage Market Days
- Waste Connections Truck Rodeo

2. SITUATION ANALYSIS: Chilhowee Park Utilization

The total number of days in which event space at Chilhowee Park was utilized either for event set-up/tear-down or for event days in which attendees were present has also remained relatively consistent over the last three fiscal years. The biggest discrepancy in utilization days occurred in FY 2018 with the two-and-a-half month long Chinese Lantern Festival that was held on the Midway. The Tennessee Valley Fair occupies the most annual utilization days at Chilhowee Park, with 23 days of occupancy. On average, other events occupy space for two days per event.

NUMBER OF UTILIZATION DAYS



NUMBER OF UTILIZATION DAYS BY TYPE

Banquet	12	22	20
Community/Civic	45	43	18
Concert	4	3	4
Festival	5	78	3
Livestock	17	19	22
Meeting/Conference	18	15	46
Non-Tenant Sport	19	17	21
Public Show	53	47	50
SMERF	29	26	37
TN Valley Fair	23	23	23
TOTAL	**225**	**293**	**244**
R.O.C.C.K Racing	93	195	4
	FY 2017	FY 2018	FY 2019

Notes: Total data do not include R.O.C.C.K. Racing events.
Source: SMG Chilhowee Park, 2019

2. SITUATION ANALYSIS: Chilhowee Park Financial Operations

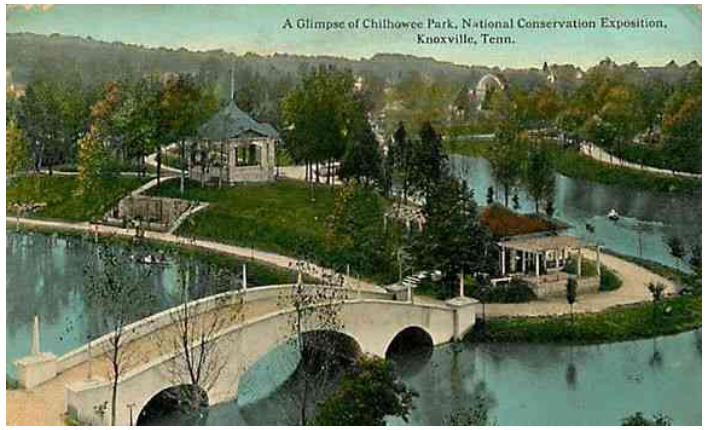
The exhibit to the below left presents a summary of the historical financial operating results of Chilhowee Park & Exposition Center annually over the past three fiscal years. The financial operating figures do not include any capital expenditures/debt, non-operating items, or an allocation of bundled private management costs. This level of operating performance is consistent with comparable facility complex averages of a similar age and nature.

The exhibit to the below right presents a summary of current rack space rental rates for Chilhowee Park & Exposition Center buildings/spaces. On a per square foot basis, these rental rates are generally lower than those of the average comparable facility complex located elsewhere in the region and country.

CHILHOWEE PARK OPERATIONS	FY 2019	FY 2018	FY 2017
Operating Revenues:			
Facility rent	$136,970	$301,166	$162,492
Food service (net)	10,186	26,407	9,738
Contract service/other	32,657	(57,415)	29,547
Subtotal	$179,813	$270,158	$201,777
Operating Expenses:			
Salaries and benefits	$626,695	$595,706	$515,910
Contract labor	988	(10,443)	20,000
Utilities	204,610	216,226	203,120
Repair & maintenance	59,433	109,689	114,949
General & administrative	29,345	34,745	33,957
Supplies	29,046	50,329	18,423
Insurance	43,581	32,968	40,833
Subtotal	$993,698	$1,029,220	$947,192
Net Operating Deficit	($813,885)	($759,062)	($745,415)

DAILY SPACE RENTAL RATES		
Jacob Building	$	1,500.00
Park Grounds	$	2,000.00
Midway Area	$	1,000.00
Tractor Pull area	$	1,000.00
Amphitheater	$	1,250.00
Lakeside Amphitheater	$	350.00
North Barn	$	500.00
South Barn	$	500.00
Arena	$	500.00
Pavilion	$	1,000.00
Multi-purpose Building	$	500.00

Move-in/Move-out rate 1/2 base rental rate per day

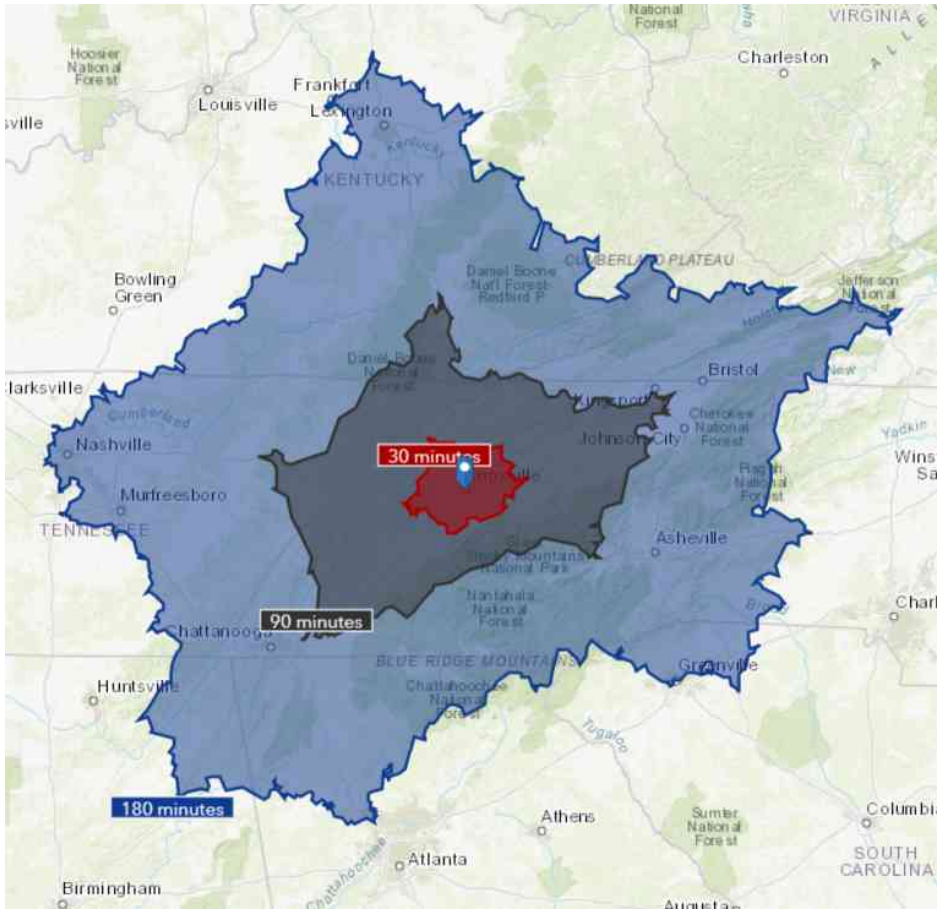


3

LOCAL & REGIONAL CONDITIONS

3. LOCAL & REGIONAL: Location & Accessibility

The exhibit to the right illustrates the location of Chilhowee Park and its proximity to nearby markets. Additionally, the exhibit demonstrates the markets and land area captured within 30-, 90- and 180-minute estimated driving distances from the Park. These distances will be utilized throughout the report for analyzing and comparing demographic and socioeconomic variables. As shown, other major population centers within a three-hour drive of Knoxville include Asheville (NC) Chattanooga (TN), Greenville (SC), Lexington (KY), and Nashville (TN), which cumulatively total nearly 4.3 million people. The market's drive-in commute is serviced by I-40 and I-75, two principal interstate highways.



Market	Distance to Chilhowee Park (in miles)	Drive Time	Market Population
Asheville, NC	112	1:53	551,600
Chattanooga, TN	117	1:58	452,300
Greenville, SC	164	2:54	885,000
Lexington, KY	177	2:50	506,800
Nashville, TN	184	2:53	1,865,300
Atlanta, GA	196	4:00	5,789,700
Huntsville, AL	216	3:33	449,700
Charlotte, NC	226	3:54	2,474,300
Louisville, KY	242	4:09	1,283,400
Winston-Salem, NC	254	4:03	662,100
Cincinnati, OH	256	3:56	2,165,100
Roanoke, VA	256	3:53	1,147,400
Columbia, SC	260	4:15	313,700
Birmingham, AL	262	3:58	817,500
Greensboro, NC	282	4:26	756,100
Evansville, IN	310	5:23	315,900
Montgomery, AL	347	5:05	1,302,900
Indianapolis, IN	356	5:55	2,041,500
Raleigh, NC	357	5:41	373,900
Columbus, OH	360	6:17	2,004,200
Memphis, TN	396	5:58	1,342,800
Savannah, GA	412	6:17	384,000
Richmond, VA	432	6:30	1,281,700
Tallahassee, FL	482	7:38	379,600
St. Louis, MO	490	7:11	2,807,000
Pittsburgh, PA	491	8:01	2,342,300

3. LOCAL & REGIONAL: Demographics

As shown, the estimated 2018 population within a 30-minute drive of Chilhowee Park is approximately 596,700, which is an estimated 21.5 percent increase over the 2000 population within that radius. This exceeds the national population growth rate of 17.3 percent, as well as the state population growth rate of 19.8 percent. The 30-minute drivetime area also has a higher average household income than the broader 90-minute and 180-minute drivetime areas as well as a higher employee-to-residential population, indicating a strong economy in the immediate region.

Demographic Variable	Knoxville	Knox County	30-minute	90-minute	180-minute	State of Tennessee	U.S.
Population (2000)	173,027	382,032	491,311	1,429,476	6,684,374	5,689,283	281,421,906
Population (2010)	178,874	432,226	555,856	1,594,269	7,517,849	6,346,105	308,745,538
Population (2018 est.)	190,718	465,546	596,708	1,672,348	8,068,821	6,818,402	330,088,686
% Change (2000-2018)	*10.2%*	*21.9%*	*21.5%*	*17.0%*	*20.7%*	*19.8%*	*17.3%*
Population (2023 est.)	198,439	487,920	623,886	1,724,971	8,437,362	7,129,010	343,954,683
% Change (2018-2023)	*4.0%*	*4.8%*	*4.6%*	*3.1%*	*4.6%*	*4.6%*	*4.2%*
Avg. Household Inc. (2018 est.)	$ 55,715	$75,215	$ 71,355	$ 63,303	$ 65,132	$ 69,261	$ 83,694
Avg. Household Inc. (2023 est.)	$ 63,554	$85,247	$ 81,251	$ 72,807	$ 74,438	$ 79,152	$ 96,109
% Change (2018-2023)	*14.1%*	*13.3%*	*13.9%*	*15.0%*	*14.3%*	*14.3%*	*14.8%*
Median Age (2018, in years)	34.8	38.9	39.5	42.4	40.4	39.4	38.3
Businesses (2018 est.)	11,403	17,775	22,776	55,490	279,997	227,771	11,539,737
Employees (2018 est.)	182,219	256,531	346,212	747,930	3,718,421	3,172,301	151,173,763
Employee/Residential Population Ratio	0.96:1	0.55:1	0.58:1	0.45:1	0.46:1	0.47:1	0.46:1

Source: Esri, 2019.

3. LOCAL & REGIONAL: Community Overview

HISTORY

Knoxville, Tennessee was officially founded in 1791 and served as the capital of Tennessee until 1817. The arrival of the railroads in the 1850s helped Knoxville grow into a major manufacturing center. Knoxville's overall growth stalled around 1950 due to several economic factors. In response, the city initiated several projects to boost growth. The World's Fair in 1982 was the most successful of those projects, and the downtown area has continued to grow from there ever since. Located in Eastern Tennessee, Knoxville is the third largest city in the state following Nashville and Memphis. As of today, the estimated population has grown to 190,718, with an average household income of $55,700. Despite the low household income, Knoxville's cost of living is four percent below the national average.

ECONOMY

As the textile industry collapsed in 1950, Knoxville's economy was forced to grow and become much more diverse. As of 2011, there was an almost even distribution of jobs in different industries, however, standout industries included energy, telecommunications, and financial services. Today, unemployment stands at 3.3% with 0.9% job growth.

ATTRACTIONS

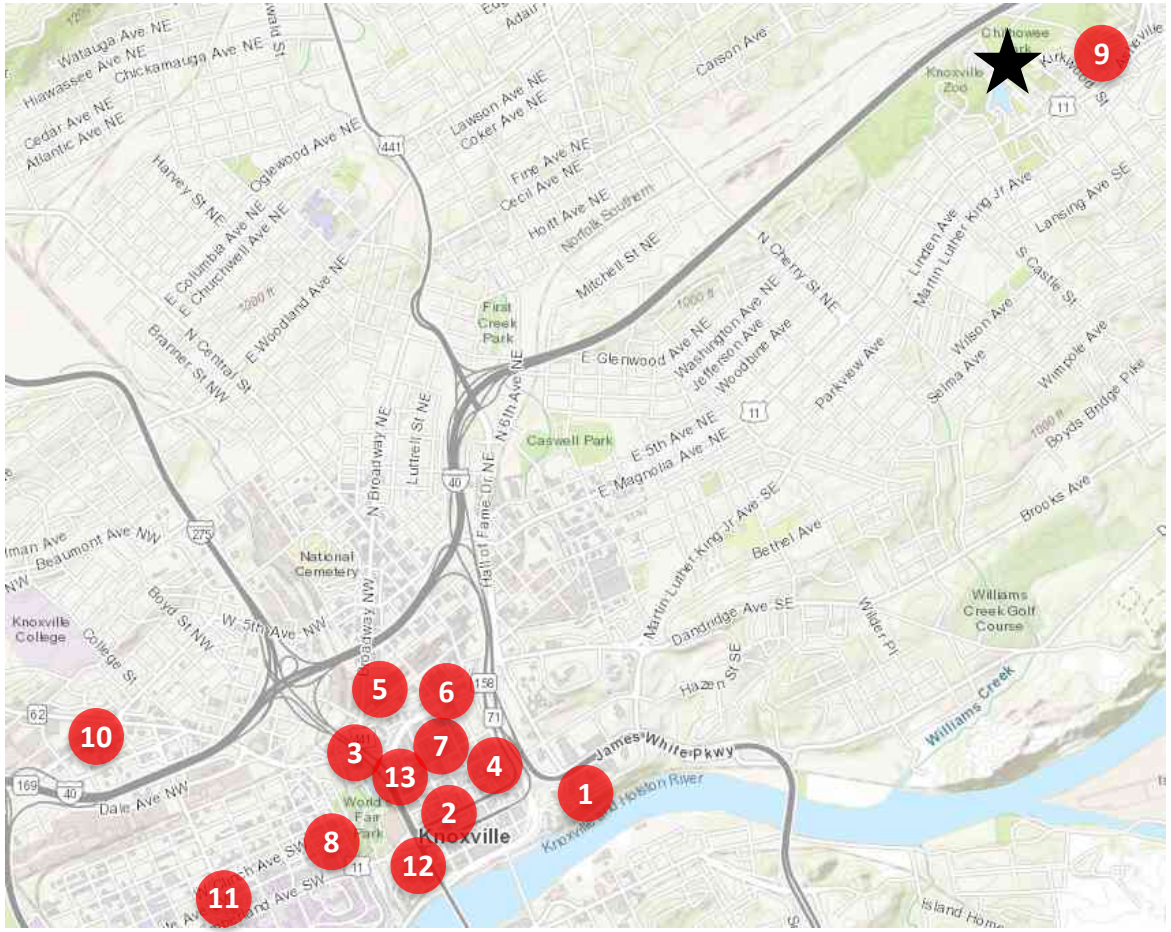
Knoxville is home to the World's Fair Park, Zoo Knoxville, the Muse Knoxville, Ijams Nature Center, Women's Basketball Hall of Fame, shopping areas, and a number of museums. The extensive Knoxville Area Transit system helps visitors get to all of the attractions.

3. LOCAL & REGIONAL: Hotel Inventory

As shown, there are 13 hotel properties throughout Knoxville that offer at least 50 sleeping rooms. Many of these are concentrated in the downtown area, with only the Days Inn in relative proximity to Chilhowee Park. Hotel Knoxville represents the city's largest single property, offering nearly 380 sleeping rooms, and it is estimated that there are approximately 2,400 total sleeping rooms within six miles of Chilhowee Park.

Key	Hotel	# of Hotel Rooms
1	Hotel Knoxville	378
2	Hilton Knoxville	320
3	Holiday Inn World's Fair Park	286
4	Courtyard by Marriott Knoxville Downtown	232
5	Crowne Plaza Knoxville Downtown University	197
6	Embassy Suites by Hilton Knoxville Downtown	176
7	Hyatt Place Knoxville Downtown	165
8	Four Points by Sheraton Knoxville Cumberland House Hotel	129
9	Days Inn Knoxville East	120
10	Hamilton Inn	115
11	Hilton Garden Inn Knoxville/University	112
12	Hampton Inn & Suites Knoxville - Downtown	85
13	The Tennessean Hotel	82

2,397
Total Hotel Rooms in Knoxville
within 6 miles of Chilhowee Park
with over 50 rooms



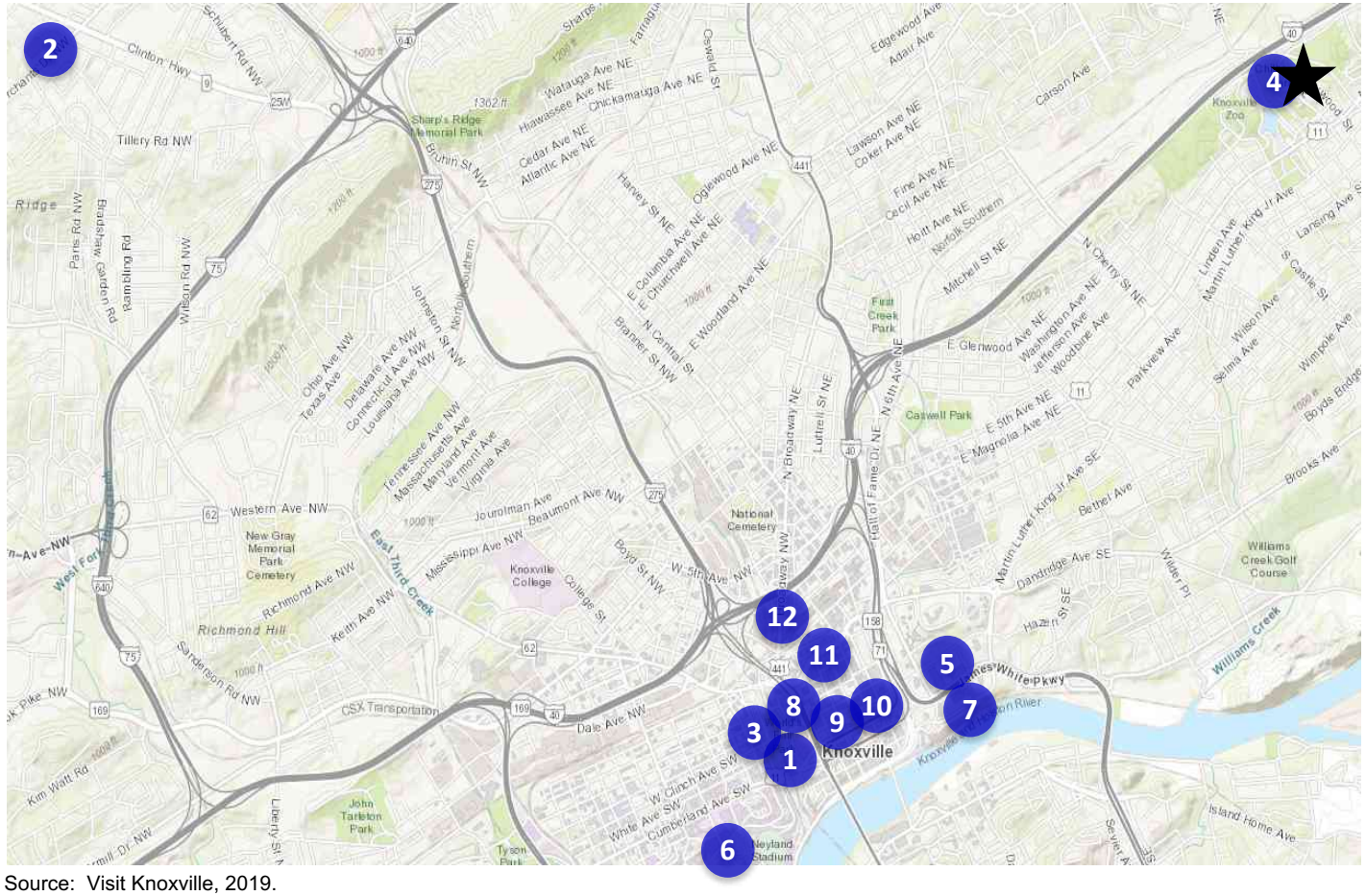
Source: Visit Knoxville, 2019.

3. LOCAL & REGIONAL: Local Flat Floor Event Facilities

There are currently 12 primary event facilities in the Knoxville area that can host an array of conferences, conventions, tradeshows, meetings, and banquets, among other flat floor event types. The exhibit below ranks the event facilities in Knoxville by total sellable event space. As the market's primary convention event facility, the Knoxville Convention Center offers over 173,000 square feet of sellable space, more than triple the amount of event space offered at the Chilhowee Park Jacob Building. The Building offers approximately 9,400 less square feet than the World's Fair Exhibition Hall and 22,200 square feet more than the Knoxville Civic Auditorium and Coliseum.

Key	Facility	Total Space in sf
1	Knoxville Convention Center	173,300
2	Knoxville Expo Center	91,500
3	World's Fair Exhibition Hall	66,400
4	Chilhowee Park Jacob Building	57,000
5	Knoxville Civic Auditorium and Coliseum	34,800
6	UT Student Union (1)	12,000
7	Hotel Knoxville	21,200
8	Holiday Inn World's Fair Park	15,000
9	University of Tennessee Conference Center	14,800
10	Hilton Knoxville	13,800
11	Crowne Plaza Downtown Knoxville	10,600
12	The Standard Knoxville	10,000

(1) Also offers 33 meeting rooms in addition to 12,000-square foot ballroom indicated. However, like most university meeting facilities, availability for non-academic groups is limited.



Source: Visit Knoxville, 2019.

3. LOCAL & REGIONAL: Local Flat Floor Event Facilities

The following facilities are two of the largest flat floor facilities in Knoxville's immediate downtown. They both host large international, national, and regional events and have the ability to be broken down into separate, smaller exhibition halls. However, these convention and exhibition centers primarily pursue a larger and/or different set of market segments than what would be likely anticipated for Chilhowee Park and Exhibition Center in East Knoxville, including events that tend to be looking for enhanced destination amenities surrounding the venue and are oftentimes willing to pay a premium (either in rent or other ancillary costs) for this location/name.

KNOXVILLE CONVENTION CENTER

The Knoxville Convention Center is located on World's Fair Park grounds in Downtown Knoxville. The venue specializes in meetings, corporate events, weddings, and other events, offering services such as in-house catering, production, and lighting. The convention center has benefited from the close proximity to many hotels, restaurants, entertainment, and shopping areas. The 480,000 square-foot facility opened in 2002 at a contract value of $96 million. Over the past decade, the center has hosted millions of attendees from more than 80 countries.

Knoxville Convention Center

WORLD'S FAIR EXHIBITION HALL

Knoxville, Tennessee hosted the last United States World's Fair in 1982 at the abandoned railroad yard next to downtown. During that summer, over 11 million people visited from twenty-two nations. After spending $46 million on developments related to the World's Fair, the city was left with several remaining facilities to serve as public entertainment areas. The area has gone through millions in renovations since then, recently opening the new World's Fair Exhibition Hall in 2018. The venue was formerly known as the Knoxville Convention and Exhibition Center before undergoing $2.1 million in renovations. The city-owned, SMG-operated facility hopes to be able to meet the growing demand for event centers going forward.

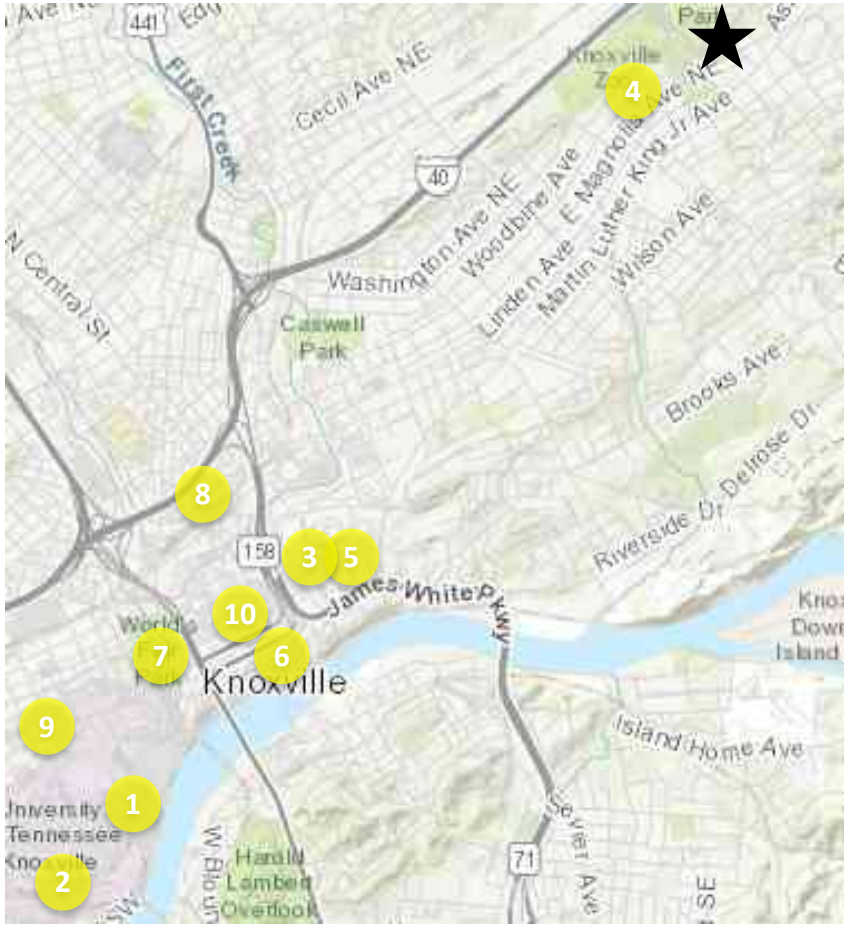
World's Fair Exhibition Hall © Inside of Knoxville

3. LOCAL & REGIONAL: Local Entertainment Venues

As a part of this study, we have inventoried the various entertainment venues throughout Knoxville that can each host a varying mix of concerts, performances and other entertainment events. The Homer Hamilton Amphitheater at Chilhowee Park offers fixed seating for 4,500 attendees, representing the fourth largest capacity in the market. The venue's capacity aligns between those of the Knoxville Coliseum and the Knoxville Civic Auditorium downtown, meaning Knoxville has three venues that offer between 2,000 and 7,000 seats, a relatively high number for a city of its size.

Key	Venue	Capacity
1	Neyland Stadium	102,455
2	Thompson-Boling Arena	21,678
3	Knoxville Coliseum	6,500
4	Homer Hamilton Amphitheater	4,500
5	Knoxville Civic Auditorium	2,500
6	Tennessee Theatre	1,645
7	Tennessee Amphitheater at World's Fair Park	1,362
8	The Mill & Mine	1,200
9	James R. Cox Auditorium	900
10	The Bijou Theatre	750

Source: Visit Knoxville, 2019.



3. LOCAL & REGIONAL: Regional Livestock/Fairgrounds

Key	Facility	City, State	Ownership Structure	Size (in acres)	Total Horse Stalls	RV Hookups	Largest Arena Seating	Event Buildings	Enclosed Arenas	Covered Arenas	Outdoor Arenas	Barns	Event Halls	Contiguous Exhibit Space	Indoor Event Space
1	Tennessee State Fairgrounds	Nashville, TN	Metro	117	0	20	2,500	15	2	0	0	6	7	28,800	113,200
2	Walters State Great Smoky Mountains Expo Center	White Pine, TN	University	N/A	408	32	3,900	7	1	1	0	4	1	98,000	98,000
3	AgriCenter International	Memphis, TN	County	1,000	632	80	4,100	12	2	1	1	6	2	50,093	96,197
4	Wilson County Fair	Lebanon, TN	County	110	200	921	3,100	12	0	1	1	3	7	45,000	68,570
5	Williamson County Fair Association Inc.	Franklin, TN	County	110	194	85	4,180	6	1	2	0	2	1	45,000	49,050
6	Tennessee Miller Coliseum	Murfreesboro, TN	University	154	500	117	4,600	8	1	1	1	5	0	45,000	46,800
7	Appalachian Fair	Gray, TN	501(c)3	85	0	56	5,200	15	0	1	1	5	8	13,580	44,000
8	Tennessee Livestock Center	Murfreesboro, TN	University	16	214	25	4,550	7	2	0	1	2	2	14,300	14,300
9	Calsonic Arena	Shelbyville, TN	University	105	1,500	294	4,469	59	2	1	1	53	2	3,000	3,000
	AVERAGE			200	400	200	4,100	16	1	1	1	10	3	38,100	59,200

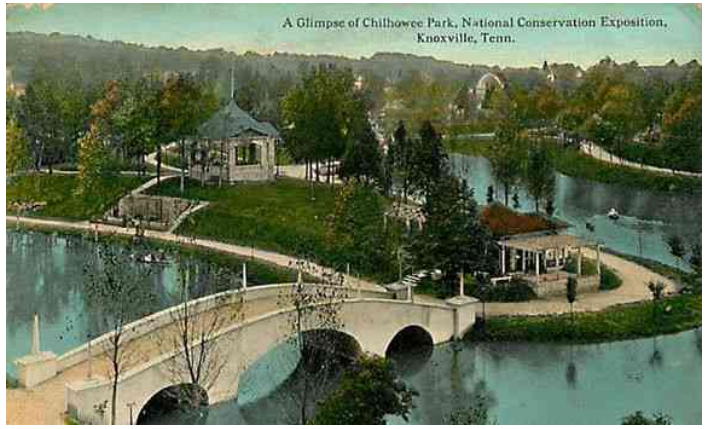
3. LOCAL & REGIONAL: Regional Entertainment Venues

Key	Venue	Venue Type	Location	Capacity	Pollstar-tracked Concerts	Avg. Tickets Sold	Avg. Gross Revenue	Distance (in miles)
1	Knoxville Civic Coliseum	Arena	Knoxville, TN	6,500	20	2,974	$142,811	3.3
2	Knoxville Civic Auditorium	Auditorium/Theatre	Knoxville, TN	2,500	41	2,095	$116,168	3.3
3	Tennessee Theatre	Auditorium/Theatre	Knoxville, TN	1,645	126	1,405	$85,705	3.5
4	Bijou Theatre	Auditorium/Theatre	Knoxville, TN	750	133	524	$17,030	3.7
5	World's Fair Park Amphitheatre	Amphitheatre	Knoxville, TN	1,362	1	N/A	N/A	4.8
6	Thompson-Boling Arena	Arena	Knoxville, TN	21,678	22	7,944	$449,551	4.8
7	Smokies Stadium	Stadium	Sevierville, TN	10,000	4	N/A	N/A	17
8	The Shed At Smoky Mountain Harley-Davidson	Outdoor Venues	Maryville, TN	2,000	67	N/A	N/A	24
9	Country Tonite Theatre	Auditorium/Theatre	Pigeon Forge, TN	1,400	17	1,351	$53,972	29.4
10	Dollywood Celebrity Theatre	Auditorium/Theatre	Pigeon Forge, TN	1,739	15	1,569	$88,664	30.8
11	Niswonger Performing Arts Center	Auditorium/Theatre	Greeneville, TN	1,150	33	858	$37,443	66.9
12	Freedom Hall Civic Center	Arena	Johnson City, TN	7,500	12	3,076	$87,697	101
13	Bristol Motor Speedway & Dragway	Outdoor Venues	Bristol, TN	148,860	1	N/A	N/A	107
14	Paramount Center for the Arts	Auditorium/Theatre	Bristol, TN	749	19	687	$18,563	110
15	The Signal	Club	Chattanooga, TN	1,300	67	853	$22,093	116
16	First Tennessee Pavilion	Amphitheatre	Chattanooga, TN	5,000	2	N/A	N/A	116
17	Soldiers & Sailors Memorial Auditorium	Auditorium/Theatre	Chattanooga, TN	3,920	16	2,237	$136,904	117
18	Tivoli Theatre	Auditorium/Theatre	Chattanooga, TN	1,780	97	1,335	$79,646	117
19	The Walker Theatre	Auditorium/Theatre	Chattanooga, TN	851	60	616	$25,268	117
20	Ascend Amphitheater	Amphitheatre	Nashville, TN	6,800	103	5,067	$206,227	183
21	Carl Black Chevy Woods Amphitheater At Fontanel	Amphitheatre	Whites Creek, TN	4,500	11	2,834	$170,890	192
22	The Levitt Shell	Amphitheatre	Memphis, TN	3,800	34	N/A	N/A	389
23	Mud Island Amphitheatre	Amphitheatre	Memphis, TN	5,061	8	3,765	$198,340	396
	AVERAGE			**10,500**	**40**	**2,300**	**113,900**	**100**
	Homer Hamilton Amphitheatre	**Amphitheatre**	**Knoxville, TN**	**4,500**	**1**	**N/A**	**N/A**	

3. LOCAL & REGIONAL: Regional Entertainment Venues

Key	Venue	Distance (in miles)
1	Knoxville Coliseum	3.3
2	Knoxville Civic Auditorium	3.3
3	Tennessee Theatre	3.5
4	Bijou Theatre	3.7
5	World's Fair Park Amphitheatre	4.8
6	Thompson-Boling Arena	4.8
7	Smokies Stadium	17
8	The Shed At Smoky Mountain Harley-Davidson	24
9	Country Tonite Theatre	29.4
10	Dollywood Celebrity Theatre	30.8
11	Niswonger Performing Arts Center	66.9
12	Freedom Hall Civic Center	101
13	Bristol Motor Speedway & Dragway	107
14	Paramount Center for the Arts	110
15	The Signal	116
16	First Tennessee Pavilion	116
17	Soldiers & Sailors Memorial Auditorium	117
18	Tivoli Theatre	117
19	The Walker Theatre	117
20	Ascend Amphitheater	183
21	Carl Black Chevy Woods Amphitheater At Fontanel	192
22	The Levitt Shell	389
23	Mud Island Amphitheatre	396
	AVERAGE	100

**Mud Island Amphitheatre (23) and The Levitt Shell (22) are not pictured, but are outdoor venues in or near downtown Memphis, TN.



4

COMPARABLE PROJECTS & INDUSTRY TRENDS

4. COMPARABLE PROJECTS: Overview

The chart below lists all twenty-three comparable facilities and developments along with their locations and attributes. Fairgrounds, exhibition centers, amphitheaters, and urban park developments from across the country that are similar to Chilhowee Park are included in this benchmarking analysis.

Venue	Location	Flat Floor / Exhibit Space	Amphitheater Seating	Arena Seating	Livestock / Fairgrounds	Urban Park Development
Montana Expo Park	Great Falls, MT	●		●	●	
Indiana State Fairgrounds	Indianapolis, IN	●		●	●	
Alliant Energy Center	Madison, WI	●		●	●	
Oklahoma State Fair Park	Oklahoma City, OK	●		●	●	
Tennessee State Fairgrounds	Nashville, TN	●		●	●	
Lane County Events Center	Eugene, OR	●		●	●	
Extraco Events Center	Waco, TX	●		●	●	
Larimer County Fairgrounds	Loveland, CO	●		●	●	
Kentucky Exposition Center	Louisville, KY	●		●	●	
Kansas Expocentre	Topeka, KS	●		●	●	
National Western Complex	Denver, CO	●			●	
Osceola Heritage Park	Kissimmee, FL	●		●	●	
PFHOF Village	Canton, OH					●
Sprint Pavilion	Charlottesville, VA		●			
Tuscaloosa Amphitheater	Tuscaloosa, AL		●			
Cuthbert Amphitheater	Eugene, OR		●			
Ascend Amphitheater	Nashville, TN		●			
Walmart AMP	Rogers, AR		●			
McGrath Amphitheater	Cedar Rapids, IA		●			
Piedmont Park	Atlanta, GA					●
Zilker Park	Austin, TX		●			●
White River State Park	Indianapolis, IN		●			●
Encanto Park	Phoenix, AZ		●			●
Chilhowee Park	**Knoxville, TN**	●	●		●	●

4. COMPARABLE PROJECTS: Demographics

POPULATION

Market	30-minute	90-minute	180-minute
Phoenix, AZ	2,773,137	4,839,757	6,568,352
Denver, CO	2,403,808	4,635,373	5,360,972
Atlanta, GA	1,746,656	6,795,065	13,637,284
Indianapolis, IN	1,383,756	3,458,066	16,280,974
Austin, TX	1,378,797	4,222,409	13,260,343
Indianapolis, IN [1]	1,298,100	3,479,274	16,099,065
Oklahoma City, OK	1,137,183	2,040,510	5,829,110
Louisville, KY	1,060,893	2,669,276	12,264,196
Nashville, TN [1]	1,051,236	2,879,619	9,645,219
Nashville, TN	1,042,142	2,870,852	9,606,262
Kissimmee, FL	841,825	5,392,302	14,796,369
Canton, OH	744,693	4,632,392	12,588,038
Loveland, CO	600,505	4,028,551	5,295,420
Knoxville, TN	586,329	1,682,707	7,867,408
Madison, WI	547,887	3,202,644	15,785,084
Rogers, AR	404,768	1,200,144	4,105,742
Eugene, OR [1]	346,284	1,083,387	4,322,975
Eugene, OR	343,450	1,066,403	4,293,395
Cedar Rapids, IA	343,111	1,400,143	4,881,131
Topeka, KS	260,874	2,675,221	5,742,057
Waco, TX	258,578	2,708,883	17,057,447
Tuscaloosa, AL	203,295	1,596,763	6,113,027
Charlottesville, VA	191,069	2,197,638	11,965,935
Great Falls, MT	80,722	167,000	517,204
Average	**888,800**	**3,010,500**	**9,392,000**
Rank (Out of 24)	**14**	**18**	**13**

AVG. HOUSEHOLD INCOME

Market	30-minute	90-minute	180-minute
Austin, TX	$94,840	$87,151	$86,942
Charlottesville, VA	$93,526	$83,215	$101,308
Madison, WI	$90,978	$77,773	$87,180
Denver, CO	$90,900	$96,219	$92,649
Loveland, CO	$87,595	$96,624	$92,949
Atlanta, GA	$86,720	$86,442	$75,837
Nashville, TN	$85,334	$74,333	$68,093
Nashville, TN [1]	$85,144	$74,220	$68,386
Cedar Rapids, IA	$85,068	$74,808	$75,711
Indianapolis, IN	$80,862	$73,544	$73,351
Oklahoma City, OK	$76,916	$70,913	$72,126
Louisville, KY	$76,861	$73,207	$73,089
Rogers, AR	$76,558	$64,822	$65,169
Topeka, KS	$74,799	$81,609	$74,928
Phoenix, AZ	$74,188	$81,477	$77,912
Indianapolis, IN [1]	$73,660	$73,662	$72,993
Eugene, OR	$71,568	$71,442	$82,791
Eugene, OR [1]	$71,530	$71,379	$82,724
Knoxville, TN	$71,001	$63,703	$64,002
Kissimmee, FL	$69,516	$70,729	$74,298
Waco, TX	$67,138	$77,815	$88,842
Great Falls, MT	$64,983	$70,304	$68,559
Tuscaloosa, AL	$63,841	$70,214	$65,009
Canton, OH	$63,078	$70,385	$71,859
Average	**$78,500**	**$77,100**	**$77,900**
Rank (Out of 24)	**19**	**24**	**24**

CORPORATE BASE

Market	30-minute	90-minute	180-minute
Denver, CO	96,520	179,235	210,863
Phoenix, AZ	93,869	136,683	189,675
Atlanta, GA	85,160	243,015	468,777
Austin, TX	52,929	137,130	411,304
Indianapolis, IN	47,112	110,278	518,768
Indianapolis, IN [1]	43,690	110,354	516,610
Nashville, TN [1]	43,576	98,345	330,448
Nashville, TN	42,960	97,981	330,441
Oklahoma City, OK	40,105	70,075	199,930
Louisville, KY	36,335	90,604	407,904
Kissimmee, FL	29,124	178,505	532,052
Canton, OH	24,504	159,473	438,111
Knoxville, TN	22,384	55,673	274,176
Madison, WI	22,151	117,367	559,729
Loveland, CO	20,869	157,327	206,825
Rogers, AR	14,204	40,603	145,190
Eugene, OR [1]	12,899	36,941	159,723
Eugene, OR	12,854	36,466	158,500
Cedar Rapids, IA	11,852	53,083	190,194
Topeka, KS	9,468	92,376	208,567
Charlottesville, VA	8,215	76,109	398,636
Waco, TX	8,198	72,490	538,211
Tuscaloosa, AL	6,365	57,276	207,496
Great Falls, MT	3,493	8,458	26,873
Average	**33,300**	**102,600**	**319,800**
Rank (Out of 24)	**13**	**19**	**13**

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Walmart AMP (Arkansas Music Pavilion)

City, State: Rogers, Arkansas

Owner: Walton Arts Center

Operator: Walton Arts Center

Facility Specs:
Fixed Seats: 3,500
Max Capacity: 10,000

Development:

- Opened in 2014 at total cost of approximately $11.5 million.
- Project funding was 100% private:
- 30% Corporate sponsors
- 26% Philanthropist interest-free loan
- 22% Willard and Pat Walker Charitable Foundation
- 22% Walmart capital investment gift.

Notes:

- The Walmart AMP is within the Fayetteville metro area which is home to a number of market differentiators, including the headquarters of Fortune 500 firms Walmart, Tyson Foods and J.B. Hunt as well as the University of Arkansas campus.
- The size of the amphitheater, the robust population and economic profile of the surrounding market area, and the location's favorable routing between major markets St. Louis and Dallas enable the venue to attract and support top-tier acts on an annual basis. Primary show season runs April through October.
- The amphitheater hosted 77 shows, sold an average of 7,000 tickets, and brought in an average of $291,200 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Sprint Pavilion

City, State: Charlottesville, VA

Owner: City of Charlottesville

Operator: Charlottesville Pavilion LLC

Facility Specs: Fixed Seating Capacity: 2,500 seats
Total Seating Capacity: 4,000 seats

Notes:

- Opened in 2005 at a total cost of $6 million.
- The Pavilion was conceptualized and constructed as a public-private partnership between the City of Charlottesville and noted city resident Coran Capshaw, manager for the Dave Matthews Band.
- Funding for the project affirmed this public-private partnership, with an up-front land transfer from the City and cash contribution from Mr. Capshaw, and City Industrial bonds issued and backed by ticket surcharges and venue revenues.
- Upon the completion of the venue's construction, full operational control of the venue was transferred to Mr. Capshaw's group (Charlottesville Pavilion LLC), with guarantees that the group would provide the City with annual funds for bond repayment and that the venue itself would provide the City with much-needed positive economic impact in its downtown corridor.
- Operating season runs from April through October.
- The amphitheater hosted 39 shows, sold an average of 3,100 tickets, and brought in an average of $124,100 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Tuscaloosa Amphitheater

City, State: Tuscaloosa, AL

Owner: City of Tuscaloosa

Operator: Red Mountain Entertainment

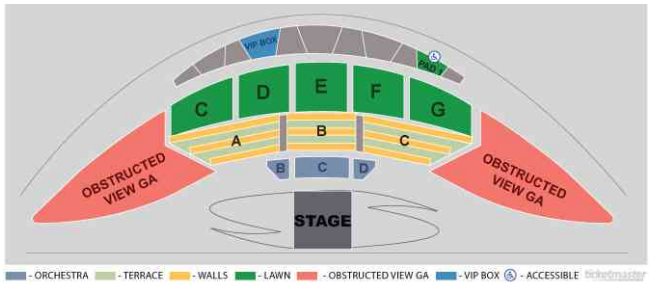
Facility Specs: Fixed Seating Capacity: 7,470 seats
Total Seating Capacity: 7,470 seats

Notes:

- Opened in 2011 for a cost of $14.9 million, the Tuscaloosa Amphitheater shares the Tuscaloosa market with differentiators such as the University of Alabama and Mercedes Benz' U.S. assembly plant.
- The Amphitheater was conceptualized and constructed by the City of Tuscaloosa as a core feature of the City's riverfront master plan, connecting to the Tuscaloosa Riverwalk trail. As such, funding for the project came from the public sector via two percent of City lodging tax revenues.
- Since the amphitheater was constructed by the City as a community amenity, continual efforts are made to ensure diversity in acts to appeal to all area residents. Certain genres draw better than others in the market, but the City prioritizes diversity over financial performance, facilitating mixed returns from acts booked. The City hired Red Mountain Entertainment to program and manage the venue, but maintains operational control with full power over booking. Primary show season runs April through October.
- The amphitheater hosted 38 shows, sold an average of 4,800 tickets, and brought in an average of $245,100 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies



FACILITY: McGrath Amphitheatre

City, State: Cedar Rapids, IA

Owner: City of Cedar Rapids

Operator: VenuWorks

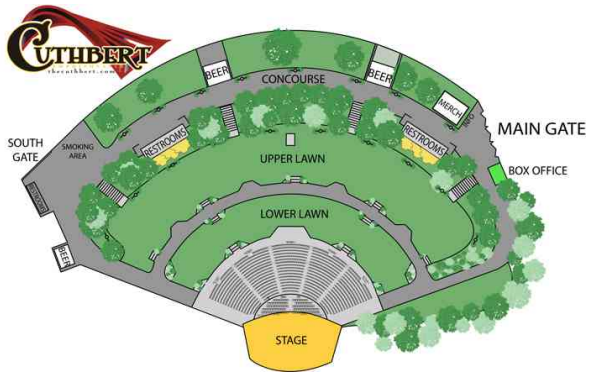
Facility Specs:
Fixed Seating Capacity: 1,400 seats
Total Seating Capacity: 6,000 seats

Notes:

- Opened in 2014 for $8 million, The McGrath Amphitheatre is located in Cedar Rapids, Iowa.
- In 2008, the Cedar River crested to its highest level in the city's history, impacting over 5,300 homes, dislocating more than 18,000 residents and damaging over 300 facilities. In response, the City looked to construct and reinforce a riverfront flood wall system. As part of this flood wall system, the City wanted to construct an outdoor amphitheater venue to provide civic entertainment. The amphitheater was constructed in part by City flood wall funds (55%), a State grant (20%) and private contributions (25%).
- As the venue first opened in the midst of the 2014 summer concert season, it is still developing consistent clientele, but the amphitheater's total capacity of 6,000, as well as the robust demographic profile of the surrounding market area, brought many acts either at- or above-tier.
- Primary show season runs May through October.
- The amphitheater hosted 28 shows, sold an average of 1,900 tickets, and brought in an average of $99,500 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies



FACILITY: Cuthbert Amphitheater

City, State: Eugene, OR

Owner: City of Eugene

Operator: Kesey Enterprises

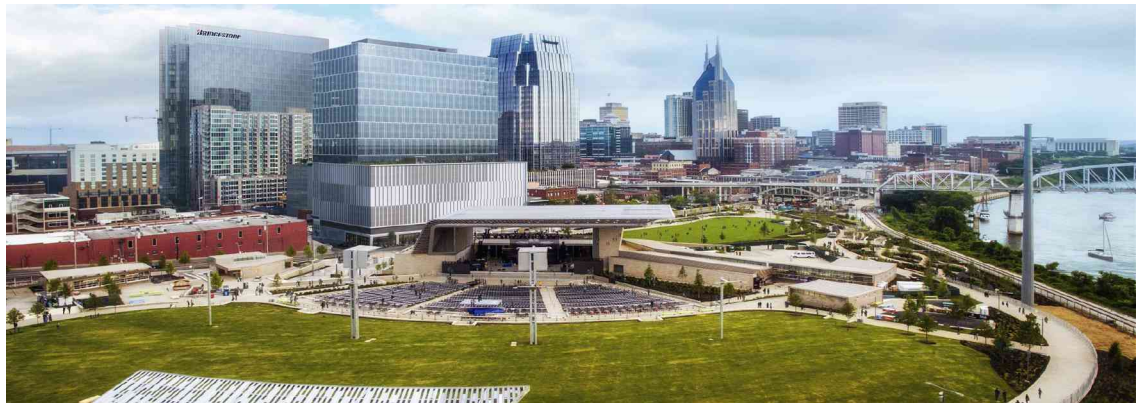
Facility Specs: Fixed Seating Capacity: 1,500 seats
Total Seating Capacity: 5,500 seats

Notes:

- Originally opened in 1982, the Cuthbert Amphitheater was renovated in 2009 for $300,000. The amphitheater is located in Eugene, Oregon, home to market differentiator, the University of Oregon.
- The amphitheater was initially constructed on the outer edge of Eugene's Alton Baker Park, near the University of Oregon's Autzen Stadium, and was renovated to modernize the venue's event-going experience.
- As the venue is located in a park, the entire renovation was funded by the City of Eugene (75%), utilizing capital fund contributions as well as contributions from the City's other publicly-owned performance venue, the Hult Center (25%).
- The mid-sized venue, at a total capacity of 5,500, is able to attract acts in tiers ranging from Tier 2B to Tier 4, but higher-tiered acts tend to struggle to gross on-tier, perhaps a function of the amphitheater's relatively limited capacity and small number of fixed seats (1,500).
- Primary show season runs May through October.
- The amphitheater hosted 49 shows, sold an average of 3,300 tickets, and brought in an average of $119,100 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies



FACILITY: Ascend Amphitheater

City, State: Nashville, TN

Owner: City of Nashville

Operator: Live Nation Entertainment

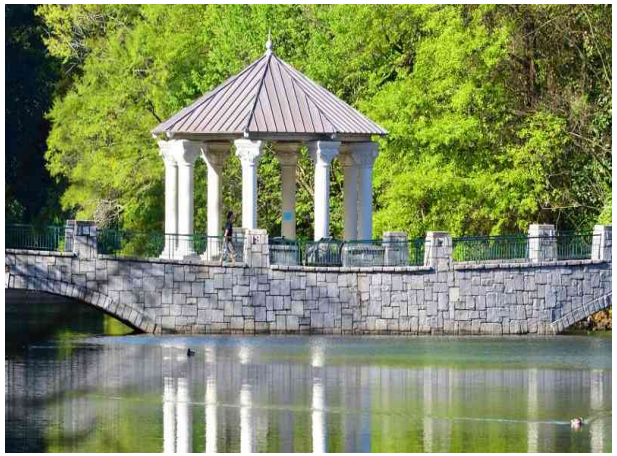
Facility Specs: Fixed Seating Capacity: 2,300 seats
Total Seating Capacity: 6,800 seats

Notes:

- The Ascend Amphitheater is located within Riverfront Park right next to downtown Nashville, and opened in 2015 for $52 million. Part of the City's West Riverfront Master Plan, the amphitheater's development was accompanied by a new flood wall, pedestrian promenade (We Are Nashville Promenade), and over twelve acres of green space.
- The Nashville Metro Council approved $35 million for the riverfront redevelopment, and reallocated an additional $7.1 million from flood relief funds. The City funded the remaining amount.
- There are 2,200 removable seats in the reserved section and 100 premium box seats between the reserved seating and lawn.
- The amphitheater was designed to mimic the Cumberland River's morphology and provide views of downtown at the same time.
- The venue has a state-of-the-art sound system, over 5,000 square feet for the artists/musicians, and a 55-foot by 100-foot stage with 45-foot clear height for easier rigging for load-ins.
- The amphitheater hosted 103 shows, sold an average of 5,100 tickets, and brought in an average of $206,200 in gross revenue according to Pollstar.

Source: Facility Management, 2019
Pollstar data counts the last 36 months and any shows scheduled throughout 2019.

4. COMPARABLE PROJECTS: Case Studies



FACILITY: Piedmont Park

City, State: Atlanta, Georgia

Owner: City of Atlanta, GA

Operator: Piedmont Park Conservancy

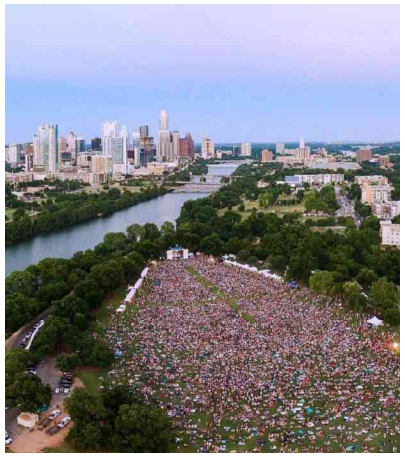
Key Facility Components: 211 acres in total
Basketball courts (1 regulation, 1 half court); 12 lighted tennis courts; 2 Bocce courts; 3-acre dog park; Legacy Fountain splash pad; educational garden; public pool; playgrounds; Lake Clara Meer
Active Oval: running tracks, 2 soccer fields, 2 softball fields, 2 sand volleyball courts
Rentals: Magnolia Hall (3,200 sf), Greystone Hall (9,000sf), Visitor Center building and dock lawn, Promenade Lawn

Notes:

- With a rich history in the area, Piedmont Park was acquired by the City of Atlanta in 1904. The Piedmont Park Conservancy formed in 1989 and partnered with the City to manage the park's future. The Conservancy has raised $66 million for the park in the past.
- A $100 million expansion is planned for Piedmont Park that will add three additional acres in an effort to grow the City's green spaces while Atlanta's population increases.
- This expansion will be funded with $80 million of private donations, primarily from Atlanta corporations, and $20 million from the Atlanta City Council.
- Piedmont Park will be extended to add more space to the Atlanta Botanical Gardens and a connection to the Atlanta Beltline.
- The park is open year-round, is free to the public, and sees 4 million visitors a year.

Source: Facility Management, 2019

4. COMPARABLE PROJECTS: Case Studies



FACILITY: Zilker Park

City, State: Austin, Texas

Owner: City of Austin, TX

Operator: Austin Parks and Recreation

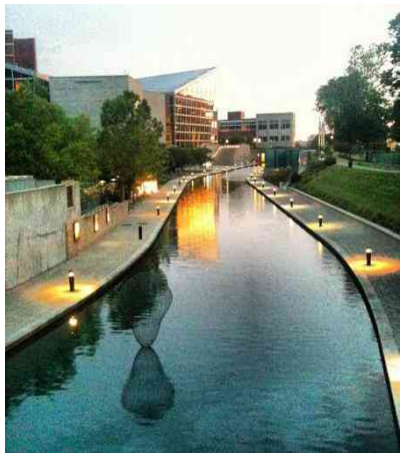
Key Facility Components: 350 acres in total
3 picnic sites; 1 shelter; disc golf course; 5 volleyball courts; Austin Nature and Science Center; Zilker Playscape; Barton Springs Pool; Zilker Botanical Gardens; McBeth Recreational Center; Zilker Caretaker's Cottage (home to the Park Rangers)
Amphitheater: Zilker Hillside Theater
Rental: Zilker Club House

Notes:

- Zilker Park was developed by the City of Austin as a public project during the Great Depression as a part of President Roosevelt's New Deal programs.
- The park's main attractions are Lady Bird Lake, where visitors can kayak, canoe or jog along the Lady Bird Hike and Bike Trail; the Barton Springs Pool: a spring-fed public pool that is always 68 degrees; Umlauf Sculpture Garden and Museum; and Austin Botanical Gardens.
- The park is the location of the famed Austin City Limits festival for two weekends in the fall every year. Over 150 acts across a variety of genres play the newest and freshest take on American music. Other events at the park include the Austin Kite Festival and Blues on the Green, another music event and concert series.
- An expansion of the park is expected in the future with preliminary planning in the works. Those developments will be funded by donations to the Austin Parks Foundation and a city-wide bond passed in 2012.

Source: Facility Management, 2019

4. COMPARABLE PROJECTS: Case Studies



FACILITY: White River State Park

City, State: Indianapolis, Indiana

Owner: State of Indiana

Operator: White River State Park Development Commission

Facility Specs: 250 acres in total
Indianapolis Zoo; Eiteljorg Museum of American Indians & Western Art; Victory Field (Home to Indianapolis Indians Baseball); Indiana's largest IMAX Theater; NCAA Hall of Champions Museum; NCAA World Headquarters; Indiana State Museum
Amphitheater: The Lawn at White River State Park

Notes:

- The White River State Park is located in downtown Indianapolis, in close proximity to the Lucas Oil Stadium, Indiana Convention Center, and numerous hotels.
- Upgrades and renovations are planned for the Lawn at White River State Park amphitheater in two phases. The first phase was completed in time for the 2019 concert schedule and included new restrooms on the north side of the facility. The second phase will be completed roughly in 2020, and will turn the temporary stage into a permanent one with fixed seating and adding a VIP lounge, a canopy-covered seating area, artist amenities, and other improvements.
- The renovations and changes will cost $27 million and will be funded jointly by Live Nation, state dollars, and private donations.
- The finished product will have 2,000 fixed seats and 4,800 open seats on the lawn.

Source: Facility Management, 2019

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Encanto Park

City, State: Phoenix, AZ

Owner: City of Phoenix, AZ

Operator: Phoenix Parks and Recreation

Facility Specs: 222 acres in total
Enchanted Island Amusement Park; 18-hole golf course; two playgrounds; multiple grilling stations and surrounding picnic space; Encanto Lagoon with boat rentals and Boat House
Sports Complex: racquetball courts; 6 volleyball courts; 4 basketball courts; 1 multi-purpose field; 1 softball field; public swimming pool with Bath House; 8 tennis courts
Amphitheater: Amphitheater Island, with 2 separate amphitheaters

Notes:

- First acquired by the City of Phoenix in 1934 at 200 acres, the park was completed in 1938. The park was constructed via the Works Progress Administration, a program from President Roosevelt's New Deal. Twenty years later, a swimming pool, the tennis courts, and a softball field were all added, along with two lagoon bridges granting better access to the children's amusement park, Enchanted Island.
- Renovations began in 1986 that and included revitalizing the lagoon and channel systems, building new restrooms, sidewalks, and a boathouse. One hundred acres of the park were added to the National Register of Historic Places as part of the Encanto-Palmcroft Historic District.
- There are two amphitheaters on the Amphitheater Island: the Small Showmobile is fifteen feet deep and seventeen feet wide while the Large Showmobile is fourteen feet deeps and thirty-six feet wide.

Source: Facility Management, 2019

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Oklahoma State Fairgrounds

City, State: Oklahoma City, OK

Owner/Operator: Oklahoma City

Facility Specs:

Complex Acreage:	435 acres
Exhibit Space:	297,950 sf
Largest Contiguous Space:	55,000 sf
Arena Space:	30,000sf; 9,000 seats
Total Indoor Event Space:	328,000 sf
Horse Stalls:	2,600 stalls
RV Hook-ups	330 hook-ups

Notes:

- Also known as the Horse Capital of the world the OKC State Fair Park annually hosts nearly 200 different world-class events.
- The Fairgrounds are currently under expansion and adding The Bennett Event Center, a 290,000-square foot expo center with over 200,000 square feet in contiguous floor space. The facility construction began in 2014 at a cost of $58.7 million and is scheduled to be completed in 18 months.

Rental Rates:

Jim Norick Arena	$2,880
Cox Pavilion	$2,400
Oklahoma Expo Hall	$2,160
Centennial Building	$1,110
Modern Living Building	$1,170
Hobbies, Arts & Crafts Building	$750
“Super Barn” (Barns 1 & 2)	$1,260
Sales Facility	$1,020
Barns 3, 5, 6, 7, 9	$420-$540
Barn 4	$1,080
Barn 8	$1,380
Performance Arena	$1,440

Source: Facility Management, 2016

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Alliant Energy Center

City, State: Madison, Wisconsin

Owner: Dane County

Operator: Dane County

Facility Specs:

Complex Acreage:	153 acres
Exhibit Space:	385,000 sf
Meeting Space:	20,300 sf
Largest Contiguous Space:	200,000 sf
Main Arena	24,900 sf; 10,200 seats
Total Indoor Event Space:	452,200 sf
Horse Stalls:	1,300 temporary stalls
RV Hook-ups	139 RV hook-ups

Notes:

Exhibition Hall at Alliant Energy Center is a 200,000 square-foot building that offers 100,000 square feet of exhibition space, a 30,000-square foot lobby and approximately 20,000 square feet of breakout meeting space.

There are approximately 500 hotel rooms surrounding AEC, including 140 at the Clarion Suites, which is connected to the Exhibition Hall.

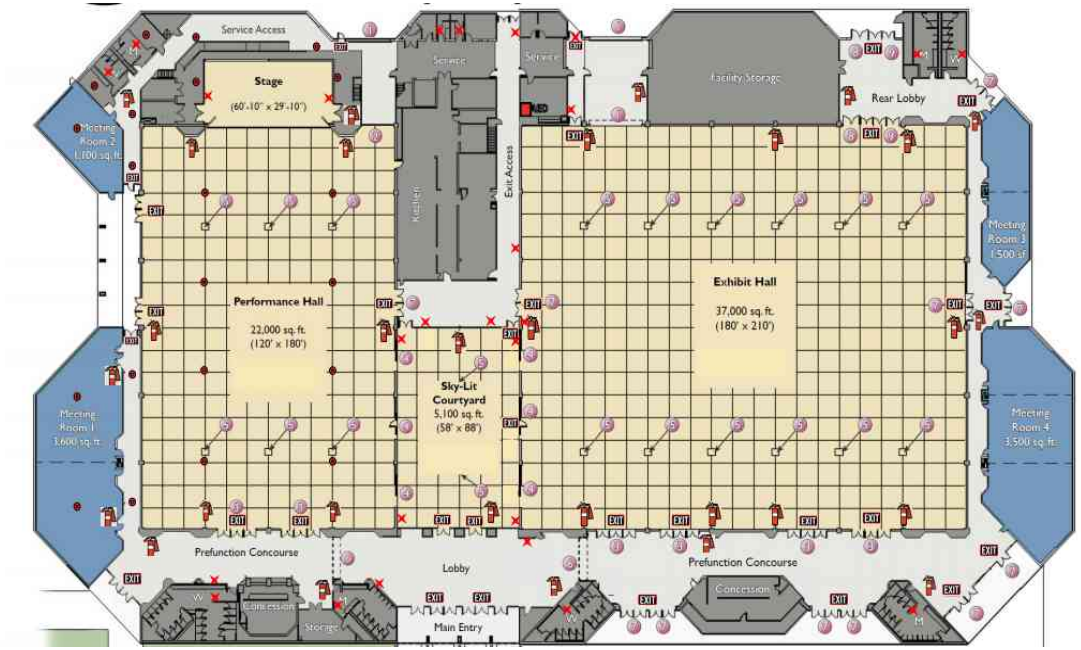
The $24.9 million New Holland Pavilions were added to the campus in September 2014, and include an 80,000-sqare foot, climate controlled exhibition hall, a 190,000-square foot exhibition hall (no climate control), and 8,000 square feet of pre-function space. The space can be used for dirt-floor show rings, horse/livestock stabling/penning, tradeshow space, amateur sports tournaments/competitions and a variety of other such events.

Complex hosted 134 events and 707,200 attendees in a recent year of operations, including 27 convention/tradeshows and 21 sporting events (such as wrestling and roller derby tournaments.

The AEC is located less than 10 minutes from downtown Madison and the University of Wisconsin-Madison campus.

Source: Facility Management, 2016

4. COMPARABLE PROJECTS: Case Studies



FACILITY:	Lane County Events Center	
City, State:	Eugene, Oregon	
Owner:	Lane County	
Operator:	Lane County	
Facility Specs:	Total Exhibit Space:	202,600 sf
	Largest Contiguous Exhibit Space:	75,000 sf
	Main Arena:	75,000 sf; 4,000 seats
	Total Indoor Event Space:	108,400 sf
	Horse Stalls:	160 stalls
	RV Hook-ups:	40 hook-ups

Notes:

The Events Center hosted 23 events and 400,400 attendees in 2015:

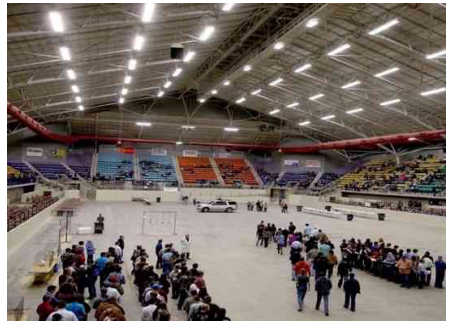
- 7 banquets (2,400 attendees);
- 23 conventions and tradeshows (98,200);
- 8 fairs and festivals (161,600);
- 6 livestock/animal shows (9,000);
- 21 meetings (2,100);
- 33 public/consumer shows (100,500);
- 14 sporting events (8,300); and,
- 11 other events (18,400).

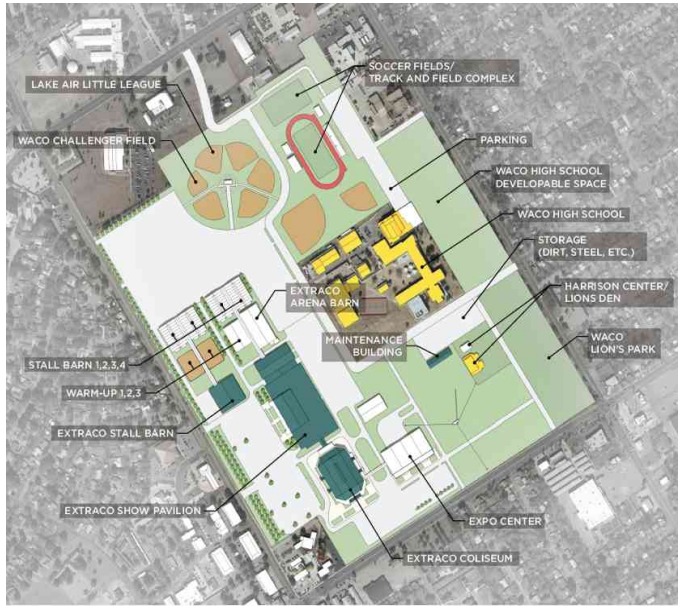
Over the last two years, has averaged:

- $2.2 million in annual operating revenues
- $3.0 million in operating expenses
- Approximate operating deficit of $762,000

Source: Facility Management, 2017

4. COMPARABLE PROJECTS: Case Studies





FACILITY: Extraco Events Center

City, State: Waco, Texas

Owner: McLennan County

Operator: Heart of Texas Fair Inc.

Facility Specs:

Total Acreage:	50 Acres
Exhibit Space:	108,000 sf
Largest Contiguous Exhibit:	38,800 sf
Largest Indoor Arena:	38,800 sf
Largest Arena Seating:	6,000 seats
Secondary Indoor Arena:	31,250 sf
Stalls:	700 Stalls
RV:	250 RV Hook-ups

Notes:

- Developed in 1953 after voters of the county authorized a bond issue of $1.2 million.
- In 2010, Extraco Banks signed a long-term naming rights deal changing the name from Heart o' Texas Coliseum to the Extraco Events Center.
- In a recent year the facility hosted over 60 events and drew in nearly 1 million attendees.
- The facility on average earns a revenue of approximately $2.4 million and records $2.5 million in expenses. Operating at a $100,000 deficit.
- Voters in McLennan County recently approved a two percent hotel tax and five percent auto rental tax fund a proposed $34.4 million project that will add a new multi-purpose exhibition center to the complex.

Source: Facility Management, 2017

4. COMPARABLE PROJECTS: Case Studies

FACILITY: National Western Complex

City, State: Denver, Colorado

Owner: City of Denver

Operator: TBD

Facility Specs:

Complex Acreage:	250 acres
Exhibit Space:	120,500 sf
Meeting Space:	8,400 sf
Largest Contiguous Space:	58,200 sf
Main Arena	63,800 sf; 9,000 seats
Total Indoor Event Space:	129,00 sf
Horse Stalls:	150 permanent stalls
RV Hook-ups	300 RV hook-ups

Notes:

- In May of 2015, the state of Colorado agreed to allocate funds of up to $250 million to make their plan of constructing a new equestrian center, stock yards pavilion, and educational facilities a reality. Additionally, the stock show agreed to contribute $50 million and Colorado State University agreed to contribute $16 million. The remainder of the funding will come from an increased tourism tax.
- The project is expected to be completed in 2024, but construction is not expected to interfere with any events occurring during that time.
- Several future projects on the facility are not included in current plans including a 10,000 seat arena, an expo center, and converting a current space into a market.

Source: Facility Management, 2018

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Kansas Expocentre

City, State: Topeka, Kansas

Owner: Shawnee County

Operator: Spectra

Facility Specs:

Total Exhibit Space:	44,500 sf
Office Space:	225 sf
Largest Contiguous Space:	44,500 sf
Arena Space:	22,500 sf; 7,450 seats

Notes:

- Located within the same building as the exhibition hall, Landon Arena provides space for concerts, hockey, basketball, and wrestling
- The exhibition hall frequently hosts tradeshows, galas, exhibitions, and amateur sporting events and has space for 3,000 people
- Exhibition space will accommodate up to 232 10'x10' booths
- Two 13-foot drive-in entrances are available to easy move in and out of the facility
- The property also features a livestock facility for animal shows and is connected to the Capitol Plaza Hotel
- In 2017, Spectra was awarded the private management contract for the Expocentre, replacing SMG who previously held the contract

Source: Facility Management, 2016

4. COMPARABLE PROJECTS: Case Studies

FACILITY: Osceola Heritage Park

City, State: Kissimmee, Florida

Owner: Osceola County

Operator: SMG

Facility Specs:

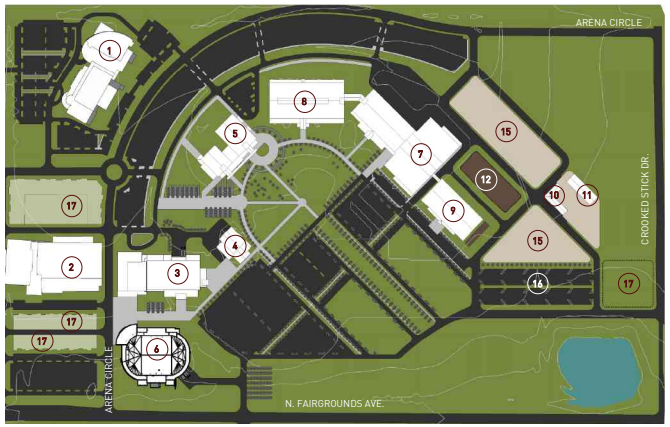
Total Exhibit Space:	100,400 sf
Largest Contiguous Space:	47,900 sf
Capacity:	8,280
Meeting Space:	11,580 sf
Arena Space:	41,000 sf; 10,500 seats
RV Hook-ups:	50 hook-ups

Notes:

- The 47,900-square foot exhibition space is divisible into two sections; one measuring 26,100 square feet and the other measuring 21,800
- Primarily used for trade shows, conferences, consumer shows, banquets, meetings, and concerts
- Contains full-service catering and concessions
- Property wide Wi-Fi allowing guests to stay connected during the meetings
- Can accommodate up to 274 10’x10’ booths

Source: Facility Management, 2016

4. COMPARABLE PROJECTS: Case Studies



THE RANCH (LOVELAND, COLORADO)

The Ranch is Northern Colorado's primary multipurpose event facility complex, featuring a spectator/entertainment arena, indoor and outdoor agriculture, equestrian and livestock facilities, and an assortment of indoor event spaces for various meetings and events. Larimer County owns all facilities at The Ranch and is responsible for operations of the grounds and all facilities, with the exception of the Budweiser Events Center (BEC), which is presently privately-managed by Spectra.

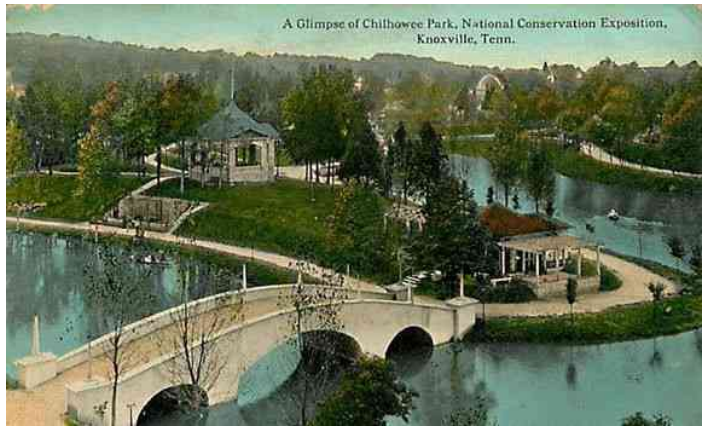
The Ranch offers nearly 215,000 square feet of indoor event space, including 82,000 square feet of arena space, 75,000 square feet of indoor barn space, 48,500 square feet of concrete floor exhibit space and 9,000 square feet of carpeted breakout meeting space.

Since its opening in 2003, The Ranch has hosted thousands of local and non-local events, including fair, agricultural events, equestrian events, conventions, conferences, tradeshows, meetings, receptions, banquets, public/consumer shows, trainings, civic events and educational events. Historically, The Ranch annually hosts over 1,000 events, drawing hundreds of thousands of visitors to its campus.

The BEC is home to the Colorado Eagles, the AHL affiliate of the Colorado Avalanche of the NHL. The Ranch hosts key recurring events including the Larimer County Fair, 4-H and Colorado State University Extension events, Goodguys Car Show, trade shows, concerts, family shows and other entertainment events, numerous equestrian and livestock events, and many other event and activities.

In 2017, a detailed Master Plan for The Ranch was completed. Later that year, Larimer County voters approved a 20-year extension of a 0.15 percent sales tax (15 cents per $100 spent) to fund continued improvements to The Ranch based on the vision of a new Master Plan

The current Ranch Master Plan envisions County investment (with strategic private partner funding involvement) in the following key areas and facilities: (1) New or expanded Sports/Entertainment Arena; (2) New Expo Hall; (3) New Hotel (full-service, nationally-branded property attached to Expo Hall); (4) New Indoor Amateur Sports (multi-sheet ice complex, natatorium, multi-use sports/rec space); (5) Expanded Equestrian/Livestock Facilities; (6) Improved 4-H and Community Facilities; and (6) Site Improvements (infrastructure, support facilities, parking, ingress/egress, connectivity).



5

MARKET OUTREACH, SURVEYS & INTERVIEWS

5. MARKET DEMAND: Outreach, Interviews & Surveys

The purpose of this section is to provide a summary of the research and analysis of market demand and opportunities to guide the future direction and growth of Chilhowee Park and Exposition Center and its leaseholders, in conjunction with the existing development plans of Zoo Knoxville, Magnolia Avenue corridor, and Burlington redevelopment. The overall market analysis consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:

- **4** visits to Knoxville by the Project Team throughout the master planning process, including site/facility tours, visual inspection of existing facilities and infrastructure, plus visioning and design charettes.

- **100+** local Knoxville area individuals participated in open house, focus group and meeting forums. Individuals included project stakeholders, user groups, and community members.

- **2,009** completed surveys received from an online community survey designed to collect opinions and information from Knoxville residents concerning the future of Chilhowee Park & Exposition Center.
- **20** completed telephone interviews were conducted with representatives of current/past user groups of Chilhowee Park & Exposition Center.

- **100+** events represented by promoters/planners contacted as part of a telephone survey of potential new event users of Chilhowee Park & Exposition Center.

5. MARKET DEMAND: Stakeholder Interviews

QUESTION:
What are the key existing STRENGTHS & WEAKNESSES of Chilhowee Park & Exposition Center?

OVERALL

Chilhowee Park is located approximately three miles northeast of downtown Knoxville between Magnolia Avenue and Interstate 40. The land was originally acquired in 1875 by Fernando Cortes Beaman and converted into Beaman Park in the late 1880's. Beaman wanted to design a community gathering place with access to entertainment, boating, swimming and other natural resources. In 1890 the park became known as Chilhowee Park and saw an uptick in popularity driven by trolley service access. In 1910 the first Appalachian Exposition was held, the success of which eventually led to the development of a permanent annual fair known today as the Tennessee Valley Fair.

Today, the Park is owned by the City of Knoxville and managed privately by SMG. There are currently three main tenants of the Park—the Tennessee Valley Fair, The Muse, and Golden Gloves. Other events include: 5k runs, car shows, church/religious events, concerts, craft shows, gun shows, neighborhood/community events, Quinceaneras, small animal shows, weddings, radio operated car club events and Knoxville Area Transit use.

SAMPLE OF COMMENTS & OPINIONS

- The property's location along Interstate 40 provides convenient access from downtown Knoxville.
- TVF attracts approximately 150,000 attendees annually.
- Zoo is a popular attraction and hosts a variety of special events throughout the year.
- The Muse is also well attended and hosts thousands of school groups and families throughout the year.
- Golden Gloves hosts 60 underprivileged kids three nights a week throughout the year.
- Flooding a significant issue—difficult to attract events because of the lack of certainty in being able to access the Park.

5. MARKET DEMAND: Stakeholder Interviews

QUESTION:

What are the primary OPPORTUNITIES & CHALLENGES for a future Chilhowee Park & Exposition Center?

SAMPLE OF COMMENTS & OPINIONS

- The TVF has been held at Chilhowee Park for one hundred years but facilities are somewhat outdated and in need of repairs, upgrades and/or redevelopment.
- The Muse attracted nearly 90,000 attendees in 2018 with a membership base of 17,000 households, but have to close during the Fair, National Hot Rod Association event and are often impacted by Park flooding issues.
- Feasibility studies conducted suggest that The Muse could attract upwards of 200,000 people annually with a larger building and better parking, ingress/egress and fewer barriers to entry for attendees.
- Zoo Knoxville attracted over 510,000 attendees in 2018 and expect to grow to 800,000 visitors by 2026.
- Chilhowee Park currently hosts approximately ten (10) animal shows per year; most tied to the University of Tennessee or the local 4-H group; would require improved/new facilities to grow this market segment.
- During non-Fair time, the barns are used by the Radio Operated Car Club of Knoxville (R.O.C.C.K. Racing); great community asset, but limited financial or economic impact generated.
- Tractor pull area almost exclusively used during the Fair – too remote, open space not well situated for events.
- Jacob Building space cannot be sub-divided into smaller spaces, columns present challenges to events looking for contiguous event space and second level space is not state-of-the-industry.
- No traditional breakout meeting space throughout the Park. Most events will use a portion of the Jacob Building, which is not optimal from a rental or operational standpoint.
- Access to the Park can be challenging – multiple entry/exit points; only one address for Park drop-off presents a challenge to ride-share drivers and/or attendees not familiar with the location of facilities at the Park.
- Homer Hamilton amphitheater is sub-standard – back-of-house leads directly onto stage, no covering for stage or seating area, concrete wall behind seating is not acoustically preferred. Limits ability to book events during non-Fair time.

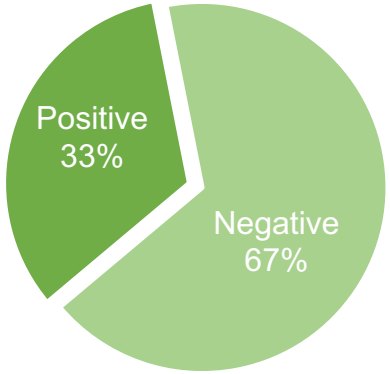
5. MARKET DEMAND: Telephone Interviews

This section presents the conclusions of the market demand research which encompasses outreach to a variety of current, past and potential users, event planners, and stakeholders of Chilhowee Park. Local and non-local user groups alike were included in the outreach portion, contacted via telephone, and surveyed about their opinions on Chilhowee Park and the Knoxville market and their likelihood of considering Chilhowee Park for their events in the future.

CURRENT & PAST EVENTS

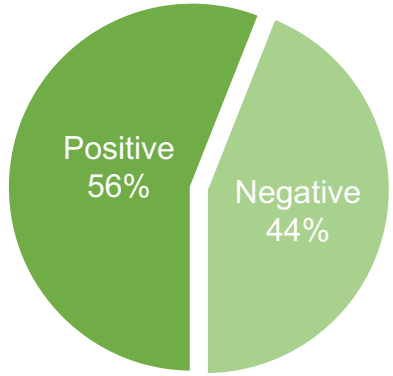
- Most were interested in preserving Chilhowee Park's ability to accommodate a diversity of event types at affordable price points.
- Many mentioned favorable opinions of and experience with Chilhowee Park management and staff.
- Nearly all believed that renovations and improvements to Chilhowee Park facilities are needed.

NEW EVENTS (LIVESTOCK)



- Many expressed the opinion that Knoxville is too far away from their typical event attendees and participants.
- A number of groups felt the Chilhowee Park site was too small and the environment too urban to be a good fit for their events.
- Of those who were interested in a Chilhowee Park location, facilities & stalling needs would reflect a larger site than available.

NEW EVENTS (FLAT FLOOR)



- Some felt the Chilhowee Park location had interesting potential, should new/improved facilities be developed.
- Jacob Building was inadequate for most, in terms of square footage, level of finish, loading, amenities, and/or lack of subdivisibility.
- A modern, low-finish, flexible, multipurpose building was the concept that appealed to many of the respondents.

5. MARKET DEMAND: Telephone Interviews

CURRENT AND PAST CHILHOWEE PARK USERS

- Every respondent contacted enjoyed using Chilhowee Park and planned on coming back in the future as budgets and scheduling allow.
- An overwhelming majority of respondents commented on the professionalism, flexibility, and helpfulness of the staff. Many pointed to that as being a major attribute for Chilhowee Park.
- Many of the respondents' events are a fit for Chilhowee Park currently as most of them require large expanses of outdoor space; a lot of the planners bring everything needed for the event and utilize the large parking lots, Midway, and the outdoor pavilions (motorcycle events, veterans' picnics, pick-up/drop-off for field trips, Girl Scout cookie sales, and charity events). While these events will continue to need a home, they are local events with little potential to bring in substantial revenue to the facility. Expanding and renovating parts of the complex will provide space for events with a higher economic impact while still maintaining current and past clientele.
- Respondents recognized there were opportunities throughout the park for renovations, most notably at the Homer Hamilton Amphitheater which was viewed as a huge asset of the complex but was outdated.
- Many thought that the Jacob Building could use an expansion as well, but that it was not the most necessary change needed. Responses indicated an expansion of 10,000 to 20,000 square feet was reasonable, would make the complex more marketable and competitive in the Knoxville market, and would accommodate any event growth. None of the respondents needed any meeting space or breakout rooms, noting the large exhibit hall style of the Jacob Building worked fine for their events.
- All respondents wanted to keep the open park spaces; some suggested better landscaping and upkeep of the grounds (cleaning up brush).
- There was some confusion about navigation into and throughout the park. However, many other respondents reported they never had a problem with navigation in the past. For those who had issues, they suggested larger signage and opening up the gates behind Jacob Building that generally remained locked.
- None of the respondents' events were affected by the flooding at the park either because of the time of year or luck. However, all respondents knew of or heard about the flooding issues and acknowledged a fix was needed in order for the park to remain competitive in the Knoxville market.
- A specific request was made for more bathrooms at different points throughout the campus as the outdoor restrooms seemed too far away from certain parts of the complex.
- There was a general consensus that the park not make too many changes, but that renovations and expansions mentioned before would help to bring out the full potential of Chilhowee Park.
- Most respondents noted nostalgically that the Tennessee Valley Fair should stay at the park.
- Some mentioned wanting to see more joint marketing efforts between the Park, the Zoo and the Muse to really achieve a larger presence in Knoxville.
- Many respondents mentioned that Chilhowee Park's accessibility along the highway was a major attribute. Additionally, some thought there were hotels close by while others thought that they were too far.

5. MARKET DEMAND: Telephone Interviews

LIVESTOCK/EQUESTRIAN EVENTS

- Overall, respondents indicated low interest in hosting livestock/equestrian events at Chilhowee Park.
- There were five main reasons highlighted that explain the lack of interest:
  - Chilhowee Park and Knoxville are located too far away for a number of livestock and equine event organizations to travel to on a regular basis.
  - There was a lack of membership in livestock and equine organizations in the Knoxville area and in Eastern Tennessee.
  - Due to the geography of East Tennessee being as mountainous as it is, there was not enough animals in the area to make it worthwhile to bring an event to Chilhowee Park or Knoxville.
  - There are a variety of large, well-established equestrian and livestock centers and complexes in Western and Middle Tennessee that many respondents did not want to move their events. The competition is high throughout the state.
  - The Chilhowee Park complex was landlocked; it is too small for a large, revenue-generating equestrian competition that needs at least two rings, 100 stalls, and a combination of arena and banquet space.
- A couple of respondents considered possibly traveling to Knoxville for an event, but they were unlikely to host their own event there. Most respondents' events brought an estimated 300 people for each show with events averaging two to three days in length. With this level of events, the investment for the facilities would be far greater than the revenue generation for Chilhowee Park or the economic impact for Knoxville.

FLAT FLOOR EVENTS

- Interest in Chilhowee Park to host flat floor/exhibit events was relatively mixed, but overall, positive.
- Event planners and organizations alike were generally curious to learn more about Chilhowee Park to keep in mind for future planning. Many had looked at Knoxville in the past and found other facilities in the area to be too pricey. With a good packaging and pricing plan in place, Chilhowee Park could stand out in the market.
- Some respondents found that the Knoxville market presented more of a metropolitan feel than most other parts of the state, excluding Nashville, noting this was a major attribute and a great opportunity to present the state of Tennessee in a more unique, fresher way.
- Other respondents mentioned their organizations were starting to build or were interested in building a following for their events and organizations in Knoxville, and that Chilhowee Park would offer them an opportunity to gain a footing in the market.
- Negative respondents thought Knoxville was too far away for them and they would lose attendance if they moved it that far east in the state. Others noted they needed a larger airport in the market with more direct flights, similar to Nashville. Additionally, a few respondents wanted to host their events in hotels with event space on property to keep everything under one roof and broker deals on room prices and free meals.
- Generally, respondents emphasized that Knoxville's market had a lot of different event spaces to offer, and that Chilhowee Park would need to distinguish itself robustly from the rest of the competition in order to be successful and noteworthy in the future.

5. MARKET DEMAND: Community Survey (Methods)

A web-based survey instrument was developed for the purpose of collecting opinions and information from Knoxville residents pertaining to the Strategic Master Plan for the Future Use of Chilhowee Park and Exposition Center.

The interactive survey included a variety of multiple-choice, simple word/phrase input, and open-ended questions. The survey could be completed with any device via a web browser (e.g., computer, phone, tablet). Paper surveys were also made available at Chilhowee Park and upon request.

An announcement and link to the survey was promoted by the City of Knoxville via its host website and associated social media platforms, as well as through media press releases and through facilitated coordination with leadership of key Chilhowee Park stakeholder groups. These local organizations also actively promoted participation in the survey through communication to their respective member/participant bases. Feedback among these types of constituents is considered particularly valuable, as they represent the past and most likely future users/consumers of Chilhowee Park & Exposition Center facilities, infrastructure and amenities.

As a primary goal of this survey was to maximize participation and feedback from past, current and possible future users of Chilhowee Park & Exposition Center, the sample technique utilized for the survey is considered a judgmental and respondent-driven sampling hybrid. As these techniques are non-probability-based, they do not support formal statistical inference. There is bias in the completed survey data set, as a result of the targeted announcement approach and differences in the strength and method of advocacy/promotion of survey participation among third parties (through their membership, athletes, coaches/leadership, and family network bases). Attempts have been made to identify and appropriately evaluate likely areas of bias.

The online survey remained open from June 13, 2019 through July 9, 2019. A total of 2,009 responses were received. The response volume received in Knoxville was higher than similar surveys that have been managed by CSL in comparable markets throughout the country.

2,009
Completed Surveys

5. MARKET DEMAND: Community Survey (Methods)

Strategic Implementation Plan for the Future Use of Chilhowee Park and Exposition Center– Community Survey Online Questionnaire

Thank you for participating in this community survey concerning the Strategic Master Plan for the Future Use of Chilhowee Park and Exposition Center. Your input and opinions are important to the City of Knoxville and the master plan team. Thank you for your interest in the project and for your participation in the discussion of important planning issues concerning the future of Chilhowee Park and Exposition Center.

Chilhowee Park and Exposition Center has long-served the residents of Knoxville as a productive community asset and an important gathering place. For more than 100 years, Chilhowee Park and Exposition Center has been home to a wide diversity of events and visitors. A strength of the Park is its appeal to a broad diversity of event and activity types, visitors, user bases, tenants, and industry segments. Situated adjacent to Zoo Knoxville, Chilhowee Park and Exposition Center contains 81 acres and includes leasehold interests of The Muse, Tennessee Valley Fair, and Golden Gloves Charities.

The intent of the Master Plan is to guide the future direction and growth of Chilhowee Park and Exposition Center and its leaseholders—The Muse, Tennessee Valley Fair, and Golden Gloves Charities—in conjunction with the existing development plans of Zoo Knoxville, Magnolia Avenue corridor, and Burlington redevelopment.

This survey is seeking your feedback on your past experiences with Chilhowee Park and Exposition Center and its facilities, along with your opinions related to needed areas of focus for an investment strategy to improve and enhance Chilhowee Park and Exposition Center for the benefit of Knoxville citizens. Please be as candid with your responses as possible and know that the information you provide will NOT be added to any type of sales-related database. We will not attribute your name, email address or other contact information to the overall results. Thank you in advance for your feedback.

Please enter the zip code in which you reside. *Write 5-digit zip code.*

This survey is intended to represent information and opinions relating to you and the members of your household. To prevent duplicate responses, please provide your email address. *Your email address will not be added to any sales or marketing lists, nor will your specific responses be attributed to your email address in any public study or survey documentation. Use email format sample@email.com. If you do not have an email address, please write your first and last name.*

Over the past two (2) years, have you visited Chilhowee Park? *Please indicate the event, activity or purpose of your visit. Check all that apply.*

- ☐ Tennessee Valley Fair
- ☐ The Muse
- ☐ Golden Gloves
- ☐ Concert (Fair-related)
- ☐ Concert (non-Fair)
- ☐ Livestock/small animal show/event (Fair-related)
- ☐ Livestock/small animal show/event (non-Fair)
- ☐ Jacob Building event (meeting, conference, tradeshow, sports, etc.)
- ☐ Non-Fair outdoor event (festival, exposition, rally, civic event, fireworks, etc.)
- ☐ Walking, picnic or other leisure activities in the Park
- ☐ Have not visited Chilhowee Park in the past 2 years

5. MARKET DEMAND: Community Survey (Methods)

Have you ever been to Chilhowee Park? If so, approximately how many years ago?

- ◯ Yes
- ◯ No
- ◯ Unsure

Approximately how many years ago? *Write numerical value only, i.e. "5".*

In a typical year, what is the approximate number of times you visit Chilhowee Park for any reason? *Write numerical value only, i.e. "5".*

Over the past two (2) years, have you visited Zoo Knoxville?

- ◯ Yes
- ◯ No
- ◯ Unsure

In a typical year, what is the approximate number of times you visit Zoo Knoxville? *Write numerical value only, i.e. "5".*

What specific events did you attend or participate in at Chilhowee Park and Exposition Center?

5. MARKET DEMAND: Community Survey (Methods)

On a scale from 1 to 5, with 1 representing low interest (not needed whatsoever) and 5 representing high interest (absolutely necessary), how would you rate the importance of renovating/improving the following facilities and site infrastructure at Chilhowee Park and Exposition Center?

	1 - Low Interest	2	3	4	5 - High Interest	Don't Know
Jacob Building (primary indoor event facility)	○	○	○	○	○	○
Homer Hamiton Amphitheater	○	○	○	○	○	○
Agriculture Pavilions & Fair/Livestock Facilities	○	○	○	○	○	○
The Muse (Children's Museum)	○	○	○	○	○	○
Kerr Buidling (Golden Gloves)	○	○	○	○	○	○
Parking	○	○	○	○	○	○
Ingress/Egress/Circulation	○	○	○	○	○	○
Green Spaces, Lake & Outdoor Leisure Areas	○	○	○	○	○	○
	1 - Low Interest	2	3	4	5 - High Interest	Don't Know

On a scale from 1 to 5, with 1 representing low interest and 5 representing high interest, how would you rate your interest in attending or participating in each of the following types of events and activities at a future improved/enhanced Chilhowee Park and Exposition Center?

Spectator Events

	1 - Low Interest	2	3	4	5 - High Interest	Don't Know
Concerts	○	○	○	○	○	○
Family Shows	○	○	○	○	○	○
Sports Games/Exhibitions	○	○	○	○	○	○
Fair	○	○	○	○	○	○
Livestock/Small Animal Shows	○	○	○	○	○	○
Rodeos/Horse Shows	○	○	○	○	○	○
E-Sports (electronic sports/videogaming events)	○	○	○	○	○	○
Festivals	○	○	○	○	○	○
	1 - Low Interest	2	3	4	5 - High Interest	Don't Know

5. MARKET DEMAND: Community Survey (Methods)

On a scale from 1 to 5, with 1 representing low interest and 5 representing high interest, how would you rate your interest in attending or participating in each of the following types of events and activities at a future improved/enhanced Chilhowee Park and Exposition Center?

Flat Floor Business & Leisure Events

	1 - Low Interest	2	3	4	5 - High Interest	Don't Know
Consumer Shows/Exhibitions	◯	◯	◯	◯	◯	◯
Conventions/Conferences	◯	◯	◯	◯	◯	◯
Meetings/Banquets/Receptions	◯	◯	◯	◯	◯	◯
Civic/Community Events	◯	◯	◯	◯	◯	◯
Continuing Education	◯	◯	◯	◯	◯	◯
Farmer's Market/Flea Market	◯	◯	◯	◯	◯	◯
	1 - Low Interest	2	3	4	5 - High Interest	Don't Know

On a scale from 1 to 5, with 1 representing low interest and 5 representing high interest, how would you rate your interest in attending or participating in each of the following types of events and activities at a future improved/enhanced Chilhowee Park and Exposition Center?

Participatory Events & Activities

	1 - Low Interest	2	3	4	5 - High Interest	N/A
Boxing/MMA	◯	◯	◯	◯	◯	◯
Basketball	◯	◯	◯	◯	◯	◯
Volleyball	◯	◯	◯	◯	◯	◯
Gymnastics	◯	◯	◯	◯	◯	◯
Ice Sports & Recreation	◯	◯	◯	◯	◯	◯
Fitness, Weightlifting, Exercise	◯	◯	◯	◯	◯	◯
Walking/Running	◯	◯	◯	◯	◯	◯
	1 - Low Interest	2	3	4	5 - High Interest	N/A

5. MARKET DEMAND: Community Survey (Methods)

What are your favorite aspects of Chilhowee Park and Exposition Center?

What is missing from Chilhowee Park and Exposition Center?

Finally, what other thoughts or suggestions do you have regarding the future of Chilhowee Park and Exposition Center, and any potential strategic redevelopment/enhancement effort?

Please indicate your age.

- ◯ Under 18
- ◯ 18 to 24
- ◯ 25 to 34
- ◯ 35 to 44
- ◯ 45 to 54
- ◯ 55 to 64
- ◯ 65 to 74
- ◯ 75 or older

How many family members are there in your household, including you?

- ◯ 1
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5
- ◯ 6 or more

5. MARKET DEMAND: Community Survey (Methods)

Please indicate the number of family members within your household that fall into the following age ranges:
(Total should equal amount from previous question, the number you indicated in the previous answer. Write '0' for each category that does not apply.)

6 and under	
7 to 11	
12 to 17	
18 to 24	
25 to 34	
35 to 44	
45 to 54	
55 to 64	
65 to 74	
75 or older	
TOTAL:	

What is your approximate annual household income?

- ◯ Under $25,000
- ◯ $25,000 to $49,999
- ◯ $50,000 to $74,999
- ◯ $75,000 to $99,999
- ◯ $100,000 to $149,999
- ◯ $150,000 to $199,999
- ◯ $200,000 or higher
- ◯ Prefer not to answer

Please indicate your ethnicity. *Check all that apply.*

- ☐ Caucasian
- ☐ Hispanic or Latino
- ☐ African American
- ☐ Native American or American Indian
- ☐ Asian/Pacific Islander
- ☐ Other
- ☐ Prefer not to answer

Thank you for your participation in this important planning effort!

5. MARKET DEMAND: Community Survey (Results)

QUANTIFIABLE RESULTS

Results related to the quantifiable questions asked in the survey are presented in this section. The subsequent section will present the feedback received related to the remaining open-ended/elective-input questions.

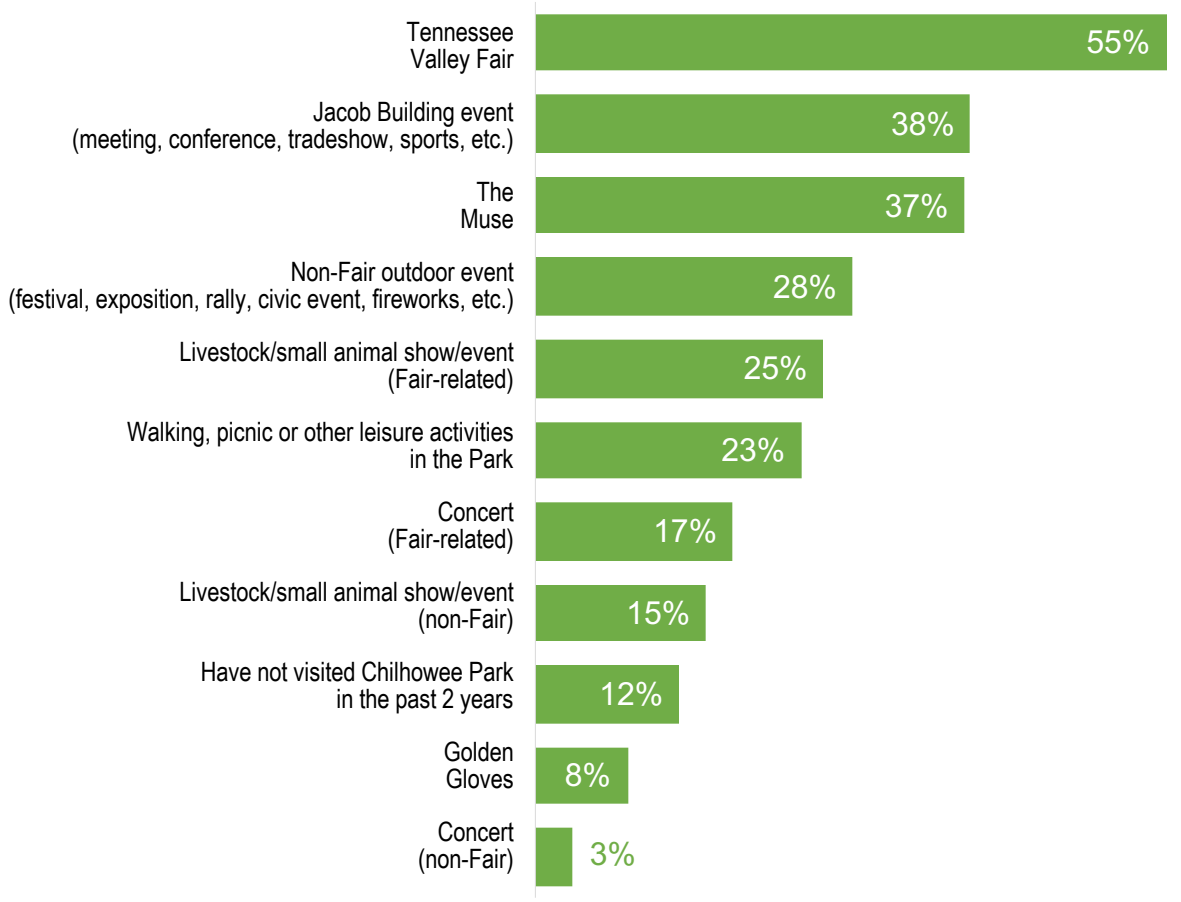
CHILHOWEE PARK
Respondents Who Have Visited During Past 2 Years

88%	10.6	3.0
Have Visited Chilhowee Park	Average Annual Visits	Median Annual Visits

ZOO KNOXVILLE
Respondents Who Have Visited During Past 2 Years

75%	5.5	2.0
Have Visited Zoo Knoxville	Average Annual Visits	Median Annual Visits

CHILHOWEE PARK VISITS OVER PAST 2 YEARS
Event, Activity or Purpose of Visit



5. MARKET DEMAND: Community Survey (Results)

INTEREST IN IMPROVING SPECIFIC CHILHOWEE PARK SPACES
On 1 to 5 Scale, with 1 = Low Interest, 5 = High Interest

	Low				High	
	1	2	3	4	5	Avg Score
Green Spaces, Lake & Outdoor Leisure Areas	4.8%	4.6%	12.2%	19.9%	53.4%	4.19
The Muse (Children's Museum)	9.1%	6.2%	13.0%	18.0%	38.7%	3.84
Jacob Building (primary indoor event facility)	8.8%	7.7%	16.7%	20.5%	34.4%	3.73
Parking	8.5%	8.9%	19.6%	19.9%	36.7%	3.72
Homer Hamilton Amphitheater	11.0%	7.1%	16.6%	17.9%	23.0%	3.46
Ingress/Egress/Circulation	10.0%	8.1%	16.8%	16.1%	22.4%	3.45
Agriculture Pavilions & Fair/Livestock Facilities	13.9%	10.6%	19.6%	13.9%	24.1%	3.29
Kerr Building (Golden Gloves)	17.6%	10.8%	14.6%	9.1%	16.1%	2.93

5. MARKET DEMAND: Community Survey (Results)

INTEREST IN ATTENDING/PARTICIPATING IN SPECIFIC EVENTS & ACTIVITIES
On 1 to 5 Scale, with 1 = Low Interest, 5 = High Interest

EVENT / ACTIVITY	TYPE	Low 1	2	3	4	High 5	Avg Score
Festivals	Spectator Event	4.6%	3.9%	15.5%	25.8%	48.4%	4.11
Farmer's Market/Flea Market	Flat Floor Business & Leisure Event	6.5%	6.0%	15.5%	24.3%	45.7%	3.99
Concerts	Spectator Event	8.8%	6.8%	19.1%	22.9%	39.9%	3.80
Fair	Spectator Event	10.5%	8.7%	17.4%	21.9%	40.4%	3.74
Family Shows	Spectator Event	11.8%	8.4%	19.5%	22.5%	35.1%	3.62
Civic/Community Events	Flat Floor Business & Leisure Event	9.6%	9.6%	23.9%	27.7%	25.8%	3.52
Walking/Running	Participatory Event & Activity	18.8%	9.3%	19.4%	22.1%	27.8%	3.32
Consumer Shows/Exhibitions	Flat Floor Business & Leisure Event	15.6%	11.5%	23.8%	23.8%	21.6%	3.25
Sports Games/Exhibitions	Spectator Event	18.2%	12.7%	23.0%	19.2%	23.7%	3.18
Continuing Education	Flat Floor Business & Leisure Event	16.9%	13.5%	24.6%	21.7%	18.9%	3.13
Conventions/Conferences	Flat Floor Business & Leisure Event	17.3%	13.8%	26.5%	21.6%	16.5%	3.06
Livestock/Small Animal Shows	Spectator Event	25.7%	15.6%	18.0%	14.5%	23.8%	2.95
Rodeos/Horse Shows	Spectator Event	25.8%	15.0%	18.8%	15.5%	22.1%	2.93
Meetings/Banquets/Receptions	Flat Floor Business & Leisure Event	20.8%	16.7%	27.4%	17.8%	12.6%	2.84
Ice Sports & Recreation	Participatory Event & Activity	27.9%	13.6%	20.7%	18.2%	16.1%	2.80
Fitness, Weightlifting, Exercise	Participatory Event & Activity	36.3%	14.8%	19.1%	13.2%	13.1%	2.50
Gymnastics	Participatory Event & Activity	35.3%	15.8%	21.8%	13.1%	10.1%	2.45
Basketball	Participatory Event & Activity	40.5%	14.7%	18.7%	12.0%	10.9%	2.36
Volleyball	Participatory Event & Activity	42.0%	17.4%	19.8%	10.0%	7.3%	2.20
Boxing/MMA	Participatory Event & Activity	54.9%	11.2%	11.4%	6.7%	12.3%	2.07
E-Sports (electronic sports/videogaming events)	Spectator Event	55.0%	13.2%	12.3%	8.0%	7.0%	1.94

5. MARKET DEMAND: Community Survey (Results)

IMPORTANCE / PRIORITY OF IMPROVING SPECIFIC CHILHOWEE PARK CHARACTERISTICS
On 1 to 5 Scale, with 1 = Low Importance, 5 = High Importance

	Low				High	
	1	2	3	4	5	Avg Score
Park & green spaces	3.0%	3.1%	11.9%	19.1%	59.9%	4.34
Walking trails/paths	4.1%	5.3%	12.5%	20.6%	54.1%	4.19
Quality facilities & amenities	3.1%	3.8%	13.2%	27.9%	48.6%	4.19
Landscaping & site beautification	3.5%	4.2%	15.4%	28.3%	45.5%	4.12
Lakes, ponds & water features	4.3%	5.5%	16.6%	24.7%	45.9%	4.05
Covered spaces (pavilions & gazebos)	3.4%	5.1%	18.5%	29.8%	40.3%	4.02
Accessibility to site & entry/exit points	5.0%	6.2%	15.8%	26.0%	43.4%	4.00
Parking offerings	7.3%	9.8%	22.6%	24.6%	32.4%	3.67
Concessions & food/beverage offerings	8.0%	13.3%	24.8%	26.9%	23.7%	3.47
Connectivity to surrounding neighborhoods	19.5%	13.4%	19.3%	18.6%	24.0%	3.15
Retail offerings	24.8%	21.5%	25.4%	13.8%	10.3%	2.62

5. MARKET DEMAND: Community Survey (Results)

OPEN-ENDED QUESTION:

What are your FAVORITE ASPECTS of Chilhowee Park & Exposition Center?

QUALITATIVE RESULTS (OPEN-ENDED)

Chilhowee Park & Exposition Center is a beloved area of East Knoxville for the natural and historic attributes of the park, its variety of different event space offered on the campus, its proximity to fellow attractions like Zoo Knoxville and the Muse, and the amount of varying community events it hosts throughout the year. So many respondents mentioned the park's inherent family and community feel. Lake Ottosee and surrounding green space have been utilized for family gatherings and picnics as ways to escape the hustle and bustle of the city. The variety of spaces from the Jacob Building to the amphitheater to the livestock barns to the open spaces allow for a variety of community events that bring together Knoxville's diverse population. The Muse and Zoo Knoxville are added amenities that continue to bring visitors and vitality to Chilhowee Park all throughout the year. Events like the Tennessee Valley Fair and the Christmas lights show in the winter bring the community together, and respondents believe Chilhowee Park & Exposition Center is the ideal and only place in Knoxville that these events would remain successful thanks to its easy access off the interstate and its place in Knoxville's history.

- Most of all, respondents highlighted that the ease of access off the interstate was one of Chilhowee Park's greatest attributes. Many felt the park's location was within a good distance to downtown Knoxville; not too close but not too far either.
- The park's natural beauty was another favorite aspect. Having green space near the city was important to many respondents, and was a main reason many continued to come back to Chilhowee Park with their families.
- The Muse, Zoo Knoxville, TN Valley Fair and Golden Gloves were all top draws associated with Chilhowee Park and the nearby area. Family-friendly and interactive aspects were prominent reasons they were mentioned by respondents.
- The ability to host all sorts of events at the park like agriculture events to teach kids about the farming industry, smaller meetings or tradeshows, flea markets in the Jacob Building or on the grounds, community gatherings like veterans' picnics, and/or outdoor concerts and barbecues in the amphitheater or elsewhere is something only Chilhowee Park & Exposition Center offers. No other event space in Knoxville has such flexibility.
- Homegrown events like the Tennessee Valley Fair, the Christmas lights drive-through at the end of the year, and charity events make Chilhowee Park seem more than an event venue for many respondents, and instead capture the essence of Knoxville as a community for so many.

5. MARKET DEMAND: Community Survey (Results)

OPEN-ENDED QUESTION:

What is
MISSING
from Chilhowee Park &
Exposition Center?

QUALITATIVE RESULTS (OPEN-ENDED)

Chilhowee Park & Exposition Center offers a variety of different spaces, and the park has been built upon many times throughout its history. Yet, respondents' suggestions point to additional needs or opportunities where the park can improve and serve the Knoxville community better. Many of the suggestions are amenity-related and what's missing, while others focus more on current conditions at the park and how they can be improved.

- In terms of design of the park, a face lift to increase green space and update buildings is needed to make Chilhowee Park more attractive to visitors and local event planners.
- The establishment of a grand entryway and better flow throughout the campus' buildings would be an improvement. Accessibility should be considered with this as well, especially to restrooms and concessions.
- A dedicated multi-functional, more traditional indoor meeting space that can be utilized for corporate, public and private events. There needs to be more of a reason to visit the park then the Muse and Zoo Knoxville, and the park also needs to have a more accessible space in the winter months when so much of it cannot be used due to the weather.
- An improved concert amphitheater is also needed. All seats should be covered, and make the venue with better acoustics and seating.
- An increased police presence or other measures of safety are needed throughout the park.
- Green space was integral to many respondents. Consider adding walking and biking trails and/or a dog park with better access to those visitors on foot, including multiple entrances. Suggestions included turning some of the asphalt into green space and opting for a parking ramp that can serve as a canvas for public art.
- To capitalize on the park's family-friendly reputation, respondents wanted to see the addition of a playground and/or splash pad (however, these are already currently offered at Zoo Knoxville). Additional attractions were mentioned like skate parks, amusement parks, mini golfing, or a skating rink.
- Building on restaurant and dining experience trends, the addition of a beer or wine garden or a café-like restaurant would be a great way to create a destination for many in the Knoxville community to want to check out.

5. MARKET DEMAND: Community Survey (Results)

OPEN-ENDED QUESTION:

What other THOUGHTS OR SUGGESTIONS do you have regarding a FUTURE Chilhowee Park & Exposition Center?

QUALITATIVE RESULTS (OPEN-ENDED)

Below are the results of the final question on the survey, highlighting any additional thoughts and suggestions from respondents. Many responses were similar to what respondents thought was missing from Chilhowee Park, while others shared other ideas and opinions on what could be improved. Primarily, Chilhowee Park needs to upgrade its buildings and green space and create a destination-like atmosphere to the park that will bring measurable economic impact in the future.

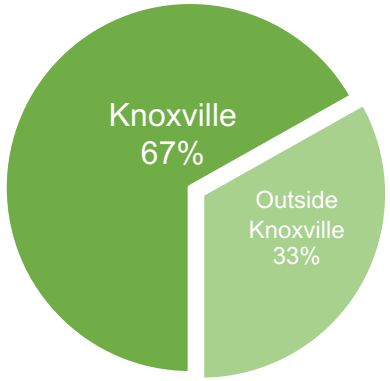
- To make Chilhowee Park & Exposition Center a tourism destination in East Knoxville, a synergistic master plan with big thinking and strong leadership that considers Zoo Knoxville's master plan is essential. Thorough research and an understanding of the limitations of the area and what needs to be fixed (i.e. flooding issues) should be incorporated into such a master plan.
- Understanding the other economic development opportunities in East Knoxville and attempting to complement those with any new renovations at Chilhowee Park would help the area as a whole.
- Many respondents were impressed with park management, and noted that needs to continue to be great.
- Incorporating and promoting amenities at Chilhowee Park that benefit the overall well-being of the surrounding community, like having fitness classes or trainers on the lawn is a great idea. Host events and organizations involved with the park who also have a primary stake in the upkeep and image of the facilities to ensure any renovations are well-kept up.
- Again, offering something that capitalizes on the craft beer and wine and food experience trends in the park could bring in a lot of individuals from downtown Knoxville. The park can be gated during these events for safety and exclusivity purposes.
- Always make sure the Muse and Zoo Knoxville have access to the park year-round, allowing groups and families to enjoy both simultaneously.
- Grow the amount of tenants that have a stake in Chilhowee Park while maintaining and increasing the membership and value of current tenants.
- Add postings or other elements that highlight the historic nature of the park. Keep its history in mind with any future design of renovations.

5. MARKET DEMAND: Community Survey (Results)

DEMOGRAPHIC CHARACTERISTICS

In total, there were 2,009 responses. Of those respondents, 67% lived in Knoxville and 33% lived outside of Knoxville. The majority of the respondents were between the ages of 35 and 44. Most generally had two to four members in their households. Fifty-four percent of household incomes fell between $50,000 and $149,000. The majority of respondents were of Caucasian descent, totaling 85% of respondents.

ZIP CODE OF RESIDENCE



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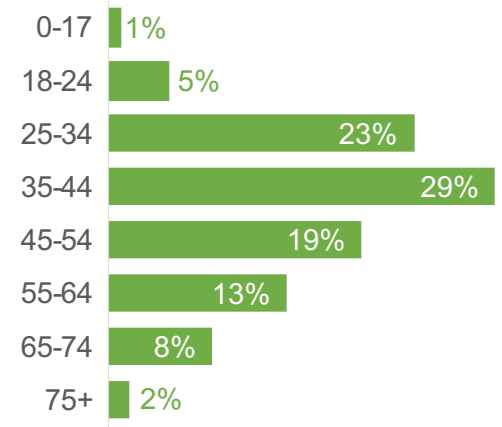
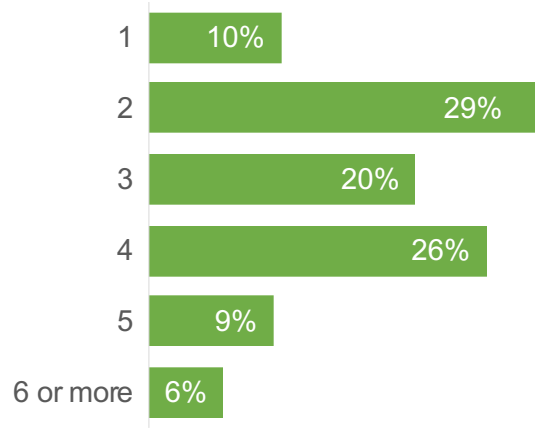
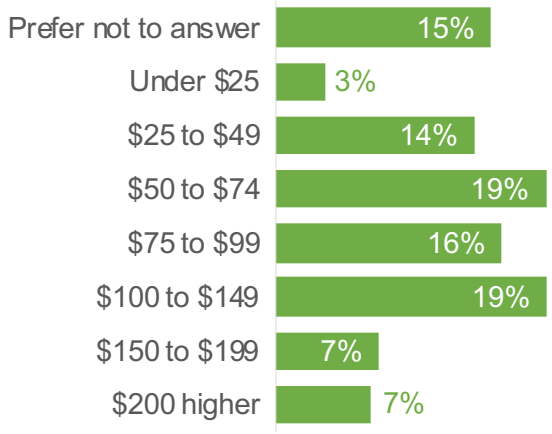


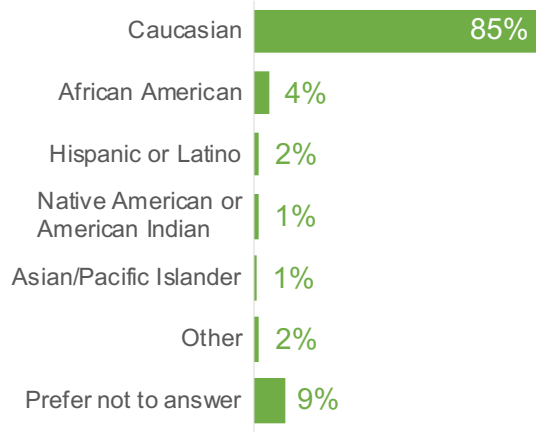
HOUSEHOLD MEMBERS

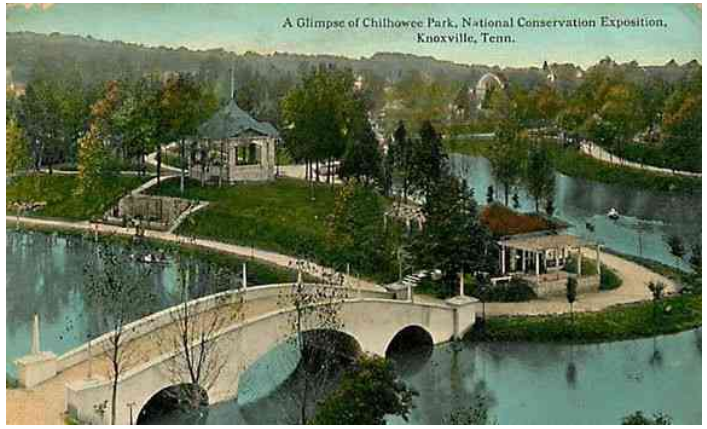


HOUSEHOLD INCOME (IN THOUSANDS)



ETHNICITY





6

PROGRAM & STRATEGY RECOMMENDATION

6. PROGRAM & STRATEGY: Core Recommendations

Based on the extensive outreach, research and analysis conducted as a part of this Strategic Planning process, a set of core recommendations have been developed concerning a bold improvement strategy for Chilhowee Park & Exposition Center. The strategy is focused around the following principles:

1. Embracing Chilhowee Park's history through a restoration of the natural beauty of its outdoor spaces, facilities and amenities.
2. Improving year-round community and neighborhood accessibility of Chilhowee Park.
3. Developing targeted new event facilities that serve important community needs and drive year-round activity and visitation to Chilhowee Park.
4. Collaborating synergistically with private partners, such as Zoo Knoxville, the Muse and/or private mixed-use developers to enhance the quality of the sub-destination and overall visitor draw.

Importantly, detailed investigation of the stormwater/flooding problems impacting the site and watershed is needed. Implementation of a comprehensive solution to appropriately mitigate the core issues causing flooding at Chilhowee Park will be necessary before investment is made on a major improvement project such as that recommended in this Strategic Plan.

The Strategic Plan includes the core new and repurposed facility recommendations shown to the right.

AMPHITHEATER

- An iconic, new, state-of-the-industry amphitheater that embraces Lake Ottosee, the natural park setting, interstate visibility, and proximity to Zoo Knoxville.
- 3,500 fixed seats. Lawn seating at inclined slope to bring capacity to 7,500.
- Permanent stage with rigging grid capable of holding required poundage (up to 50,000) of touring acts with appropriate stage clearance. Covered stage, but minimal obstructions behind stage to maximize view corridors through performance space to the Lake and rest of Park.
- Modern support space, including 1 star dressing room + 3 additional dressing rooms, plus restrooms, concessions and ticket/box office.
- 1,900 parking spaces needed nearby.

MULTI-USE FACILITY

- A new, state-of-the-industry multipurpose facility. Would replace the Jacob Building as the primary indoor event venue at Chilhowee Park, plus house Golden Gloves and Park administrative offices.
- 30,000 square feet of Exhibit Space. Concrete floor, column-free, subdividable (minimum of 3 moveable airwalls), 30-foot or higher ceiling height.
- 6,500 square feet of Meeting Space. Carpeted, subdividable into between 7-10 individual rooms of varying sizes (between 350-1,000 sf per space).
- 15,000 square feet for Golden Gloves primary activity/training space.
- 2,500 square feet of Admin Office space.
- 91,800 square feet of gross facility space.

JACOB BUILDING

- Repurposed for an alternate use, such as the Muse or other museum/attraction.
- No significant improvements to be assumed to the structure for this Strategic Planning exercise.

6. PROGRAM & STRATEGY:

Recommended Master Plan Concept

6. PROGRAM & STRATEGY:

Site Transformation

6. PROGRAM & STRATEGY:

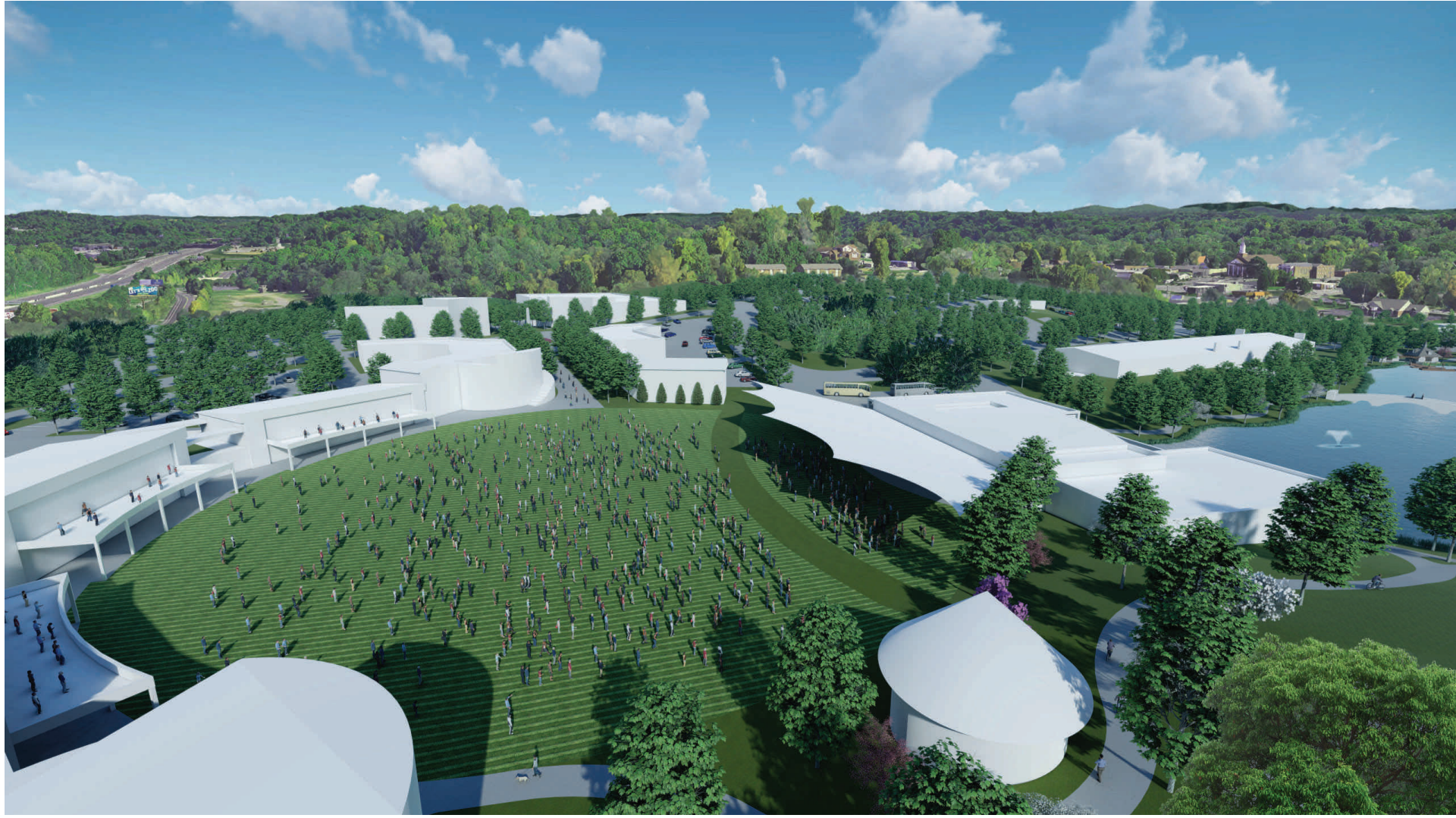
Concept View Facing North

6. PROGRAM & STRATEGY:

Concept View Facing South

6. PROGRAM & STRATEGY:

Concept View of Amphitheater



6. PROGRAM & STRATEGY:

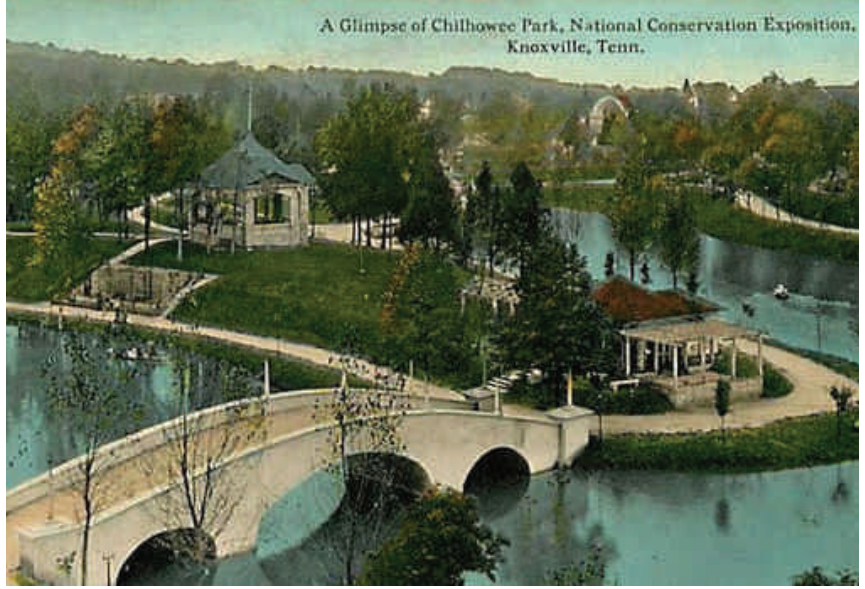
Concept View of Boat House

6. PROGRAM & STRATEGY:

Concept View of Greenway

6. PROGRAM & STRATEGY:

Precedent Imagery



1911 CHILHOWEE PARK VIEW

1911 OTTOSEE LAKE

BOATHOUSE

SPECIALTY USE

6. PROGRAM & STRATEGY:

Precedent Imagery

AMPHITHEATER

EXHIBITION HALL

MIXED USE

RESIDENTIAL

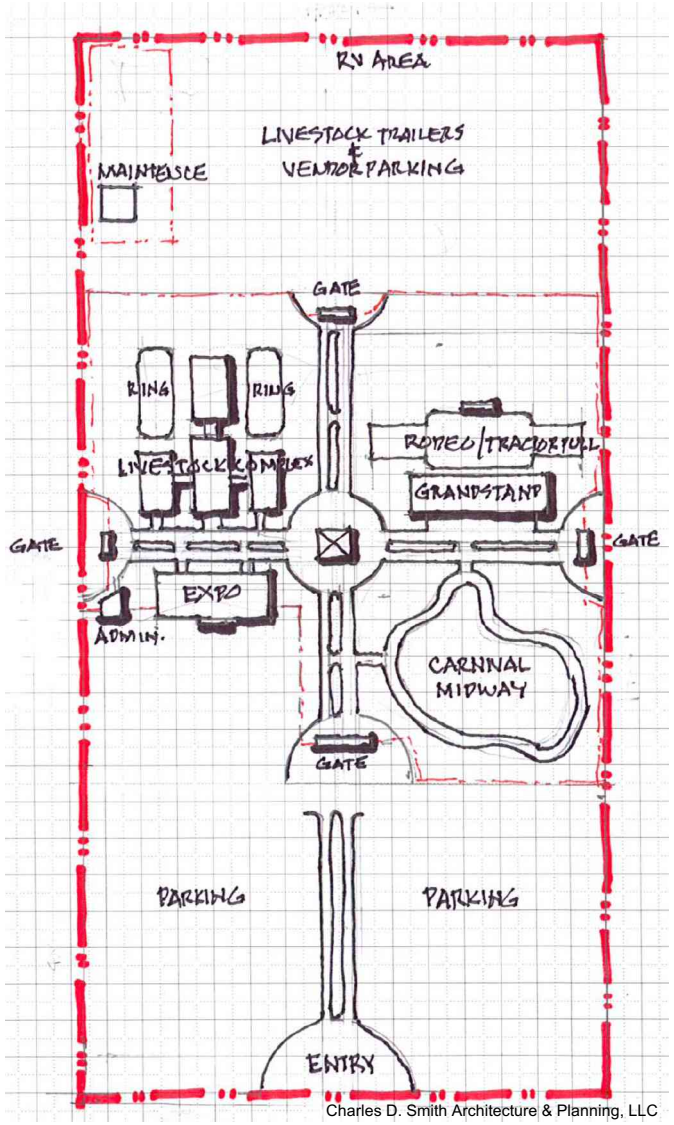
6. PROGRAM & STRATEGY: TN Valley Fair Opportunity

To more efficiently utilize land area and to maximize the year-round market and economic opportunity at Chilhowee Park, the recommended Strategic Plan would involve a relocation of the Tennessee Valley Fair to an alternate site. Recognizing the long-standing history and community importance of the Tennessee Valley Fair, it is recommended that any ultimate master plan and funding strategy for improvements at Chilhowee Park also include the identification of a financially-viable path forward that would allow Fair owners and stakeholders to continue producing the Fair in Knoxville at an alternate site.

In fact, an alternate site could create an opportunity for an enhanced, higher performing fairgrounds product. A new location with more appropriate facilities could lead to a significantly-increased ability to accommodate year-round livestock, agricultural and equestrian activity than presently exists at Chilhowee Park.

Based on current industry standards, a hypothetical fairgrounds product that would be consistent with or improve upon the facility program, capacities and capabilities that Chilhowee Park presently provides the Tennessee Valley Fair would include:

- Expo Buildings/Barns:
  - 1 @ 40,000SF (concrete floor, enclosed)
  - 4 @ 15,0000SF to 25,000SF each (dirt, could be covered/open-sided)
- Outdoor Arena:
  - 4,000-5,000 covered grandstand-type bench seats on one side
  - 300'x150' ring for rodeo plus ability to convert for concerts & tractor pulls
- Outdoor warm ups: 2 @ 250'x125' rings
- Midway (asphalt), Admin Offices & Maintenance Buildings
- Parking & RV: 5,000+ spaces (paved + gravel/grass)
- Site Acreage: 90-100 acres
- Order-of-Magnitude Construction Costs (excluding site): $20-25 million



Charles D. Smith Architecture & Planning, LLC

6. PROGRAM & STRATEGY: Construction & Operations

Order-of-magnitude construction costs have been estimated pursuant to the elements of the recommended Strategic Plan for Chilhowee Park. Figures represent hard and soft construction costs and are presented in terms of a range and should be considered hypothetical at this early concept stage. Figures do not include costs related to the flood/stormwater mitigation that will be necessary before the development of the Strategic Plan facilities occurs. Figures also do not include a full or partial contribution towards the development of a new fairgrounds at an alternate site for the Tennessee Valley Fair.

The cost estimates were generated using industry per-unit data adjusted for conditions in Knoxville and cost data of comparable development projects, modified for time and locations. Construction costs tend to vary widely among comparable event facility and urban park projects. Many variables exist that influence actual realized construction costs, including type of facility, size, components, level of finish, integrated amenities, costs of goods and services in the local market, location and topography of the site, ingress/egress issues, and other such aspects. Additional design and costing study would be required to specifically estimate construction costs for the proposed project.

Total order-of-magnitude project costs associated with all the public-sector led elements of the recommended Strategic Plan could range from approximately $81.5 million to $111.0 million, not including flood/stormwater mitigation costs.

Should the entire recommended Strategic Plan be developed, the financial operating performance of Chilhowee Park would be expected to improve by $450,000 to $1.5 million per year, reflecting the significantly higher event and attendance levels driven by the improvements and the higher revenue-generating facility characteristics and amenities.

PRELIMINARY CONSTRUCTION & OPERATING COSTS

	Low	High
CONSTRUCTION COSTS		
Amphitheater	$15,960,000	$26,600,000
Multipurpose Building	$24,418,800	$30,523,500
Parking Structure	$31,122,000	$38,902,500
Softscape/Features	$10,000,000	$15,000,000
TOTAL	**$81,500,800**	**$111,026,000**

Note: Does not include flood/stormwater mitigation costs.

	Low	High
ANNUAL OPERATING PROFIT/LOSS		
Amphitheater	$200,000	$500,000
Multipurpose Building	($500,000)	($200,000)
Parking	$0	$300,000
Outdoor Events	($50,000)	$100,000
TOTAL	**($350,000)**	**$700,000**
Existing Chilhowee Park	($800,000)	($800,000)
INCREMENTAL	**$450,000**	**$1,500,000**

6. PROGRAM & STRATEGY: Alternative Improvements

If the Strategic Plan is not pursued in the near-term, the improvements outlined in the exhibit to the right represent capital repair, replacement and improvement items that would be important for maintaining and enhancing operational efficiency, safety, marketability, and patron experience at Chilhowee Park. The items at the bottom half of the exhibit were identified based on the large amount of feedback received via the community survey, outlined previously in this document.

IMPROVEMENTS RECOMMENDED IF STRATEGIC PLAN IS NOT PURSUED	
IN CURRENT CAPITAL IMPROVEMENT BUDGET	
Repaint Barns and replace gutters/downspouts	$60,000
Paint exterior of Administrative Office	$30,000
Paint interior of Jacob Building	$50,000
TOTAL BUDGETED IMPROVEMENTS	**$140,000**
ADDITIONAL ITEMS FOR CONSIDERATION BASED ON COMMUNITY SURVEY	
Clean/dredge Lake Ottosee	$500,000
Repave and stripe Parking Lots	$1,000,000
Improve tree canopy and hardscape at Midway to enhance property for festivals, markets, and concerts	$500,000
Replace bathrooms at Midway	$750,000
Design and create greenway loop/painted trail on pavement for daily use	$50,000
Improve exterior building, parking and path lighting	$200,000
Improve traffic flow—particularly near the Muse	$100,000
Enhance park ingress/egress and signage	$250,000
TOTAL PROPOSED IMPROVEMENTS	**$3,350,000**
COMBINED TOTAL	**$3,490,000**