

September 17, 2020

James Brown Arena Market Analysis

Prepared for the Augusta-Richmond County Coliseum Authority

Perkins&Will

hunden
strategic
partners



Executive Summary

KEY QUESTIONS

HSP EXPLORED THE FOLLOWING KEY QUESTIONS AND THEIR IMPLICATIONS:

1 What is the market opportunity for concerts and entertainment, indoor sports events, consumer shows, and other kinds of events?

2 How will the market demographics in the Augusta area and the region affect a new arena development?

4 How will each recommended scenario perform and what will their impact be on the city?

3 What capacity and premium seating breakdown best addresses the local market demographics and the regional competition?



CURRENT LANDSCAPE

In order to understand the viability of this new arena development in Augusta, Georgia it is critical to first understand the current situation of the local market, the condition of the current James Brown Arena, and the competitive landscape in the region.



LOCAL MARKET

The local market is growing, has a strong healthcare and military presence. The community is looking for a gathering place and a connection to the growing downtown area.



CURRENT JBA

The existing James Brown Arena is outdated, outmoded and not competitive for many types of events. A new arena will allow Augusta to compete for most events on a local and regional scale.



SITE

The site provides opportunity for a new development to create a walkable destination that can host an array of entertainment and event offerings. A community plaza can create pre- and post-event impact opportunities.



SUPPLY & DEMAND

The existing JBA is not able to compete effectively against its peers, which are larger, newer and have more amenities. There is demand for larger arena events that the JBA cannot accommodate. There is a gap for a large ballroom, which can induce demand.



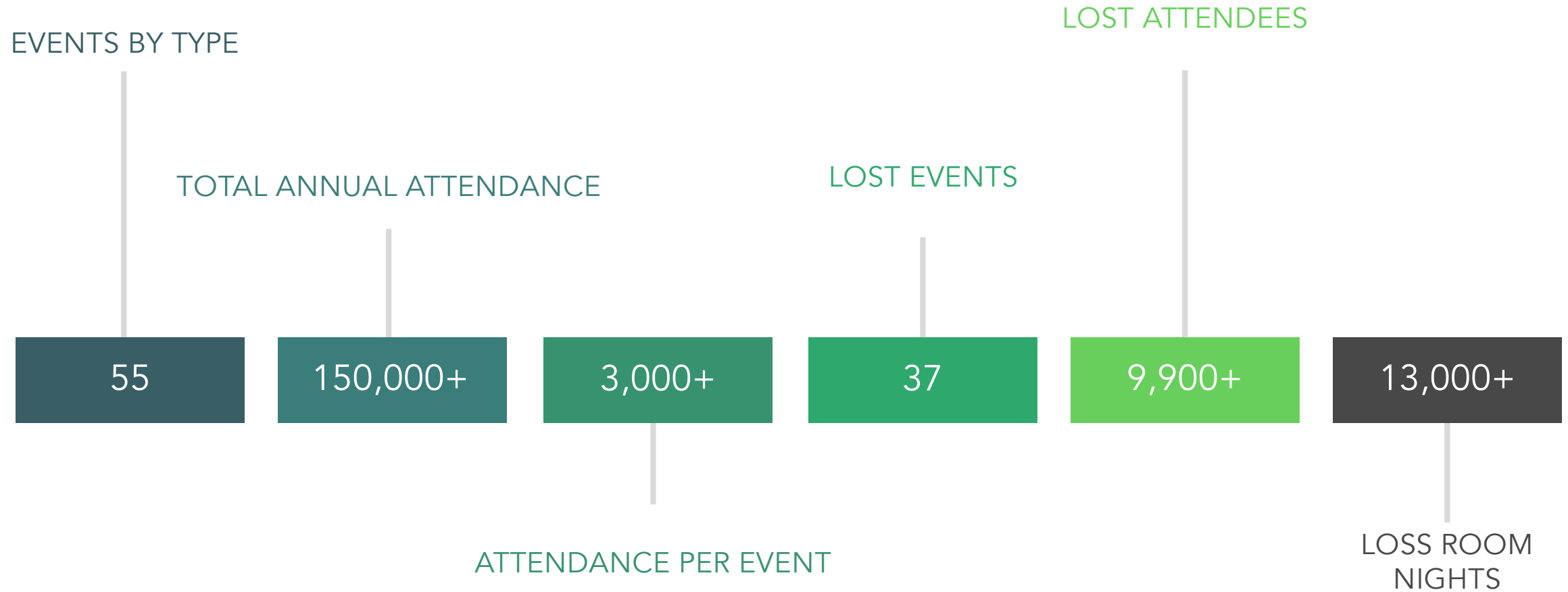
COMPETITORS

There are numerous competitors in a 2-3 hour drive time. Most other cities in the region have developed new, larger arenas or renovated existing arenas to the point that the JBA is one of the oldest, least appealing and smallest venues in the region.

Current Situation

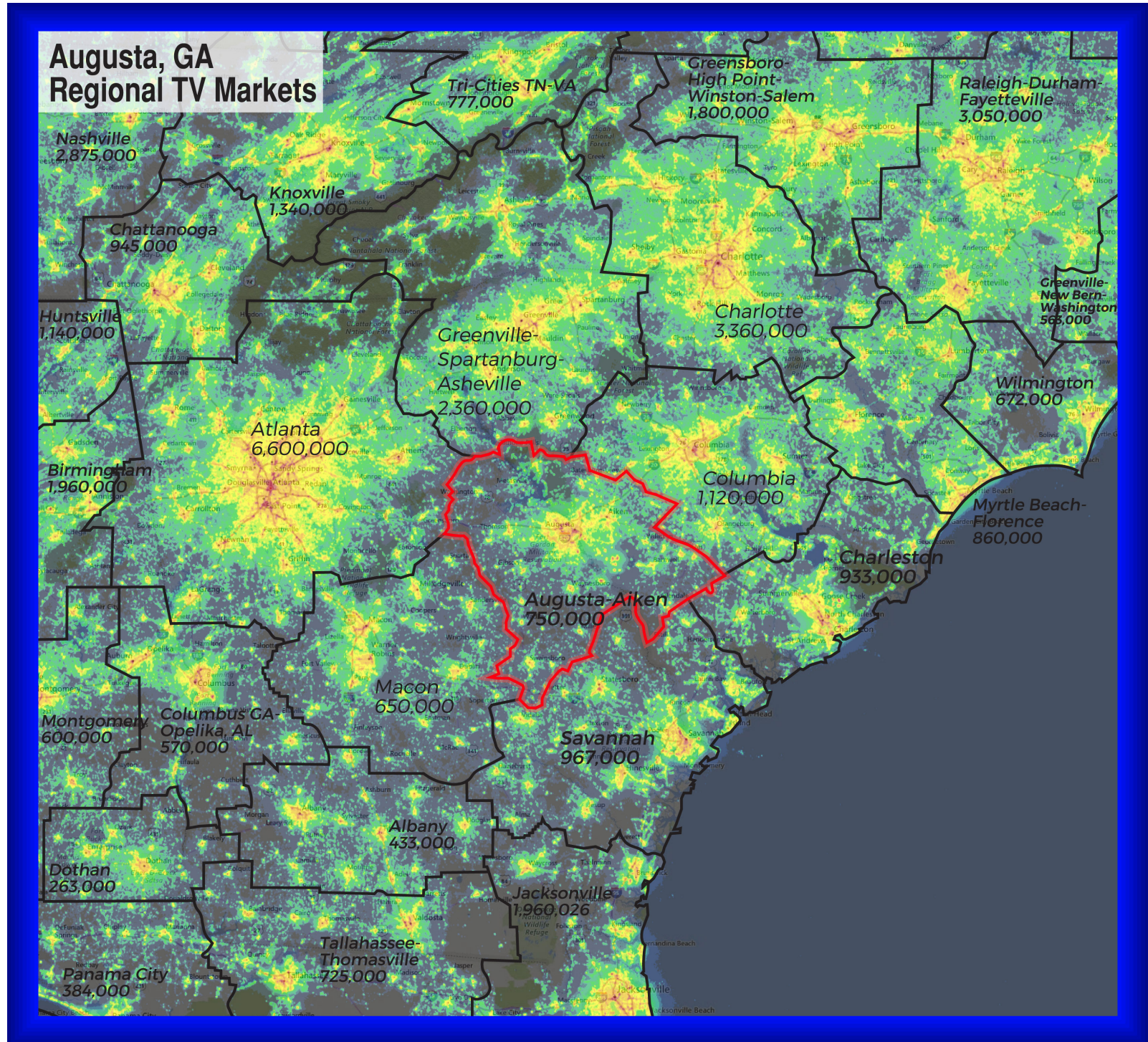
CURRENT JAMES BROWN ARENA

(ANNUAL AVERAGES FROM 2015 - 2019)



Population Distribution

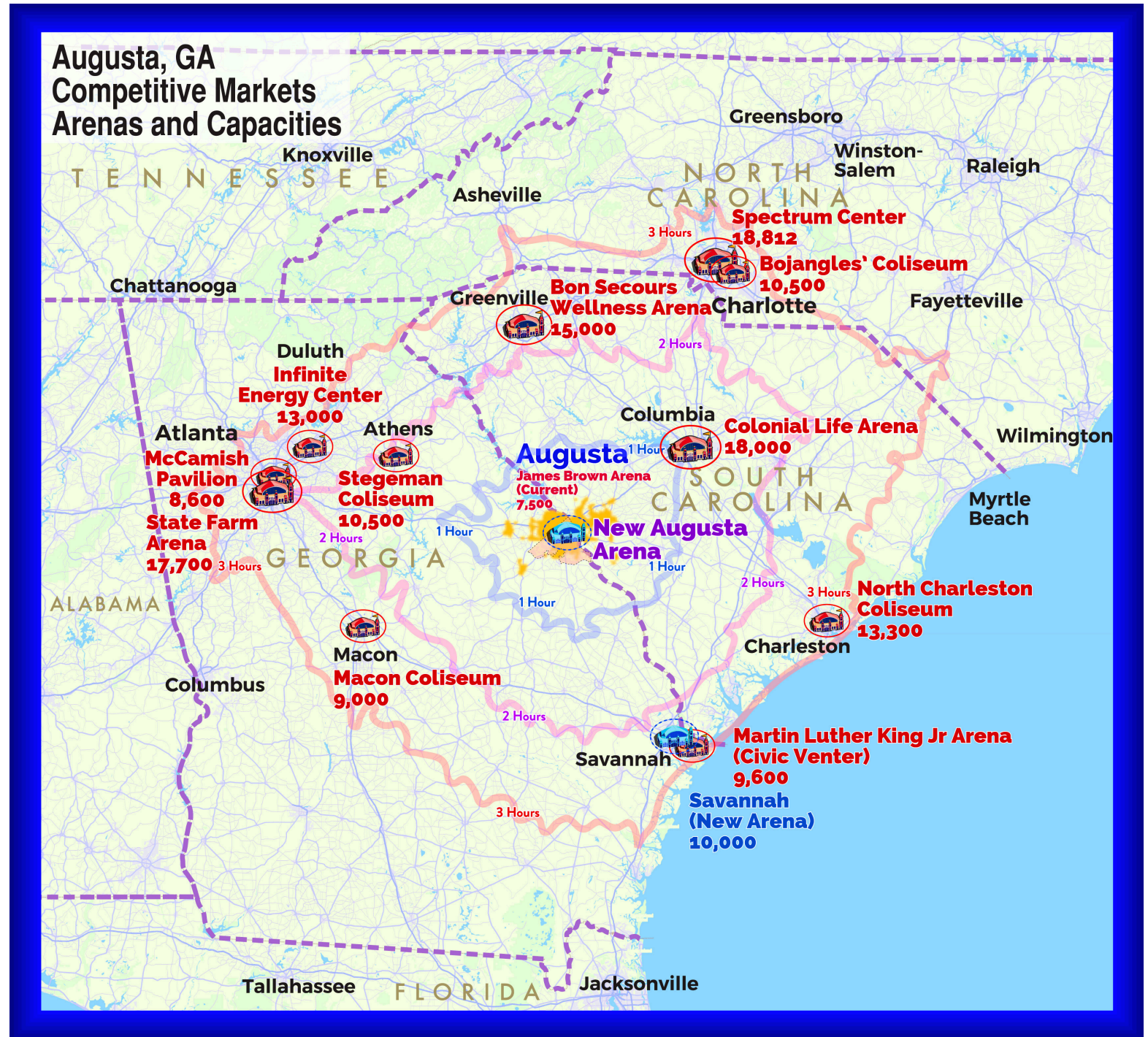
Significant opportunity to connect with the booming Columbia market.



Regional Competitive Arena Map

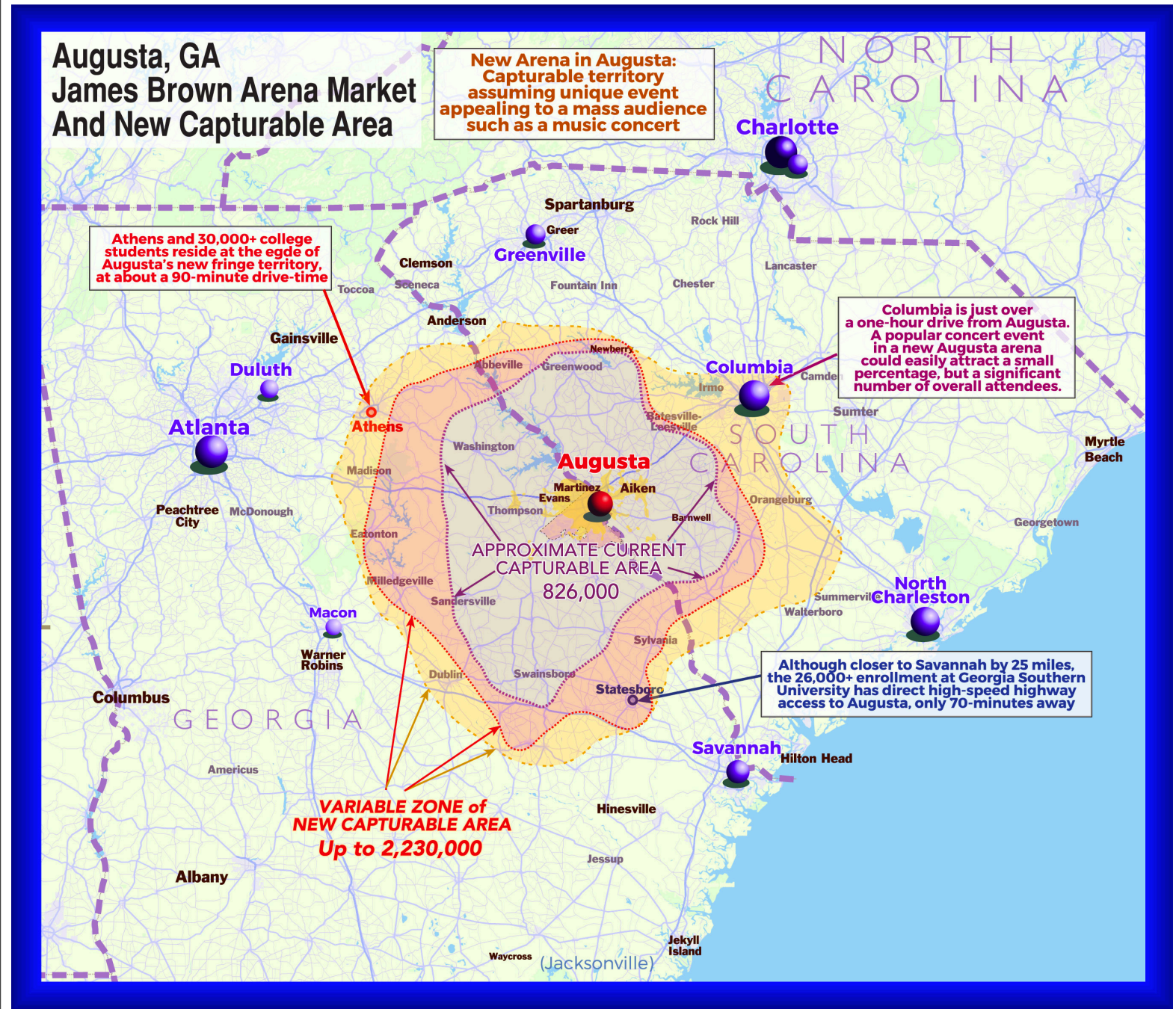
Competitor Statistics:

- Average Capacity: 13,000
- # of Premium Seats: 1,400+
- Nearly all built/renovated since 2010



Capturable Arena Market

Augusta's current capturable area is shown in the adjacent map. Nearby arenas with higher quality amenities and larger capacities are pulling from the shared population between the existing arenas.



SWOT & Recommendations

ARENA DEVELOPMENT SWOT ANALYSIS

How External and Internal Factors Affect Project Viability

	INTERNAL FACTORS	EXTERNAL FACTORS
POSITIVE	<p>STRENGTHS</p> <ul style="list-style-type: none">▪ Existing book of Arena Business▪ Georgia Cyber Center▪ Healthcare▪ Augusta National Golf Club	<p>OPPORTUNITIES</p> <ul style="list-style-type: none">▪ James Brown Legacy▪ Larger events▪ Connection to improving downtown▪ Religious market
NEGATIVE	<p>WEAKNESSES</p> <ul style="list-style-type: none">▪ Lack of Attractions▪ Corporate Presence▪ Access▪ Existing JBA Size, Quality	<p>THREATS</p> <ul style="list-style-type: none">▪ Competition from Larger and Newer Facilities▪ Renovated Competitors

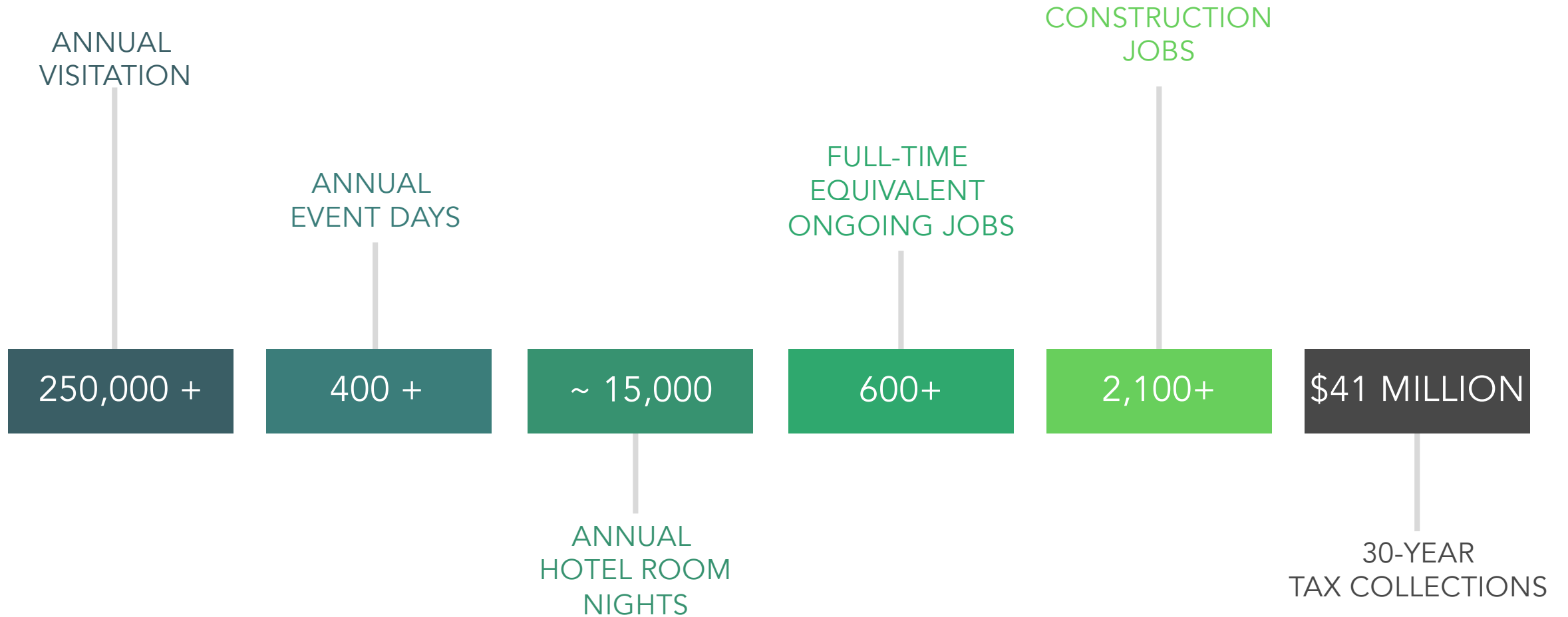
Recommendations

Components	Primary	Secondary
Arena		
End-Stage Capacity	10,000+	10,000+
Lower Bowl Capacity	6,500	6,500
Premium Seats	1,050	1,050
Suites	12	12
Meeting Space (Bell Auditorium Connection)		
Ballroom (SF)	20,000	-
Meeting Rooms	12	-
Meeting Rooms (SF)	1,200	-
Boardroom (SF)	500	-
Other		
Connection to Bell Auditorium	Yes	Yes
Outdoor Event Plaza	Yes	Yes

Projections with Meeting Space

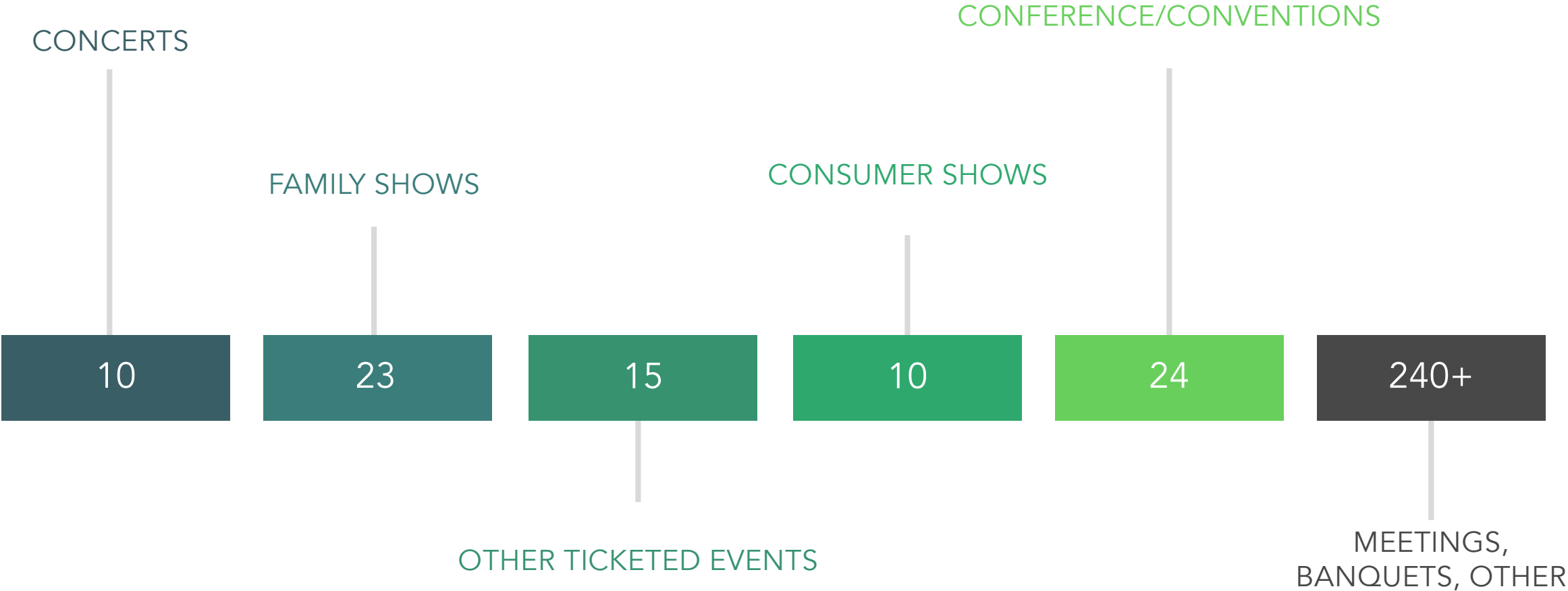
PROJECT & IMPACT HIGHLIGHTS

(Arena with Ballroom & Meeting Space)



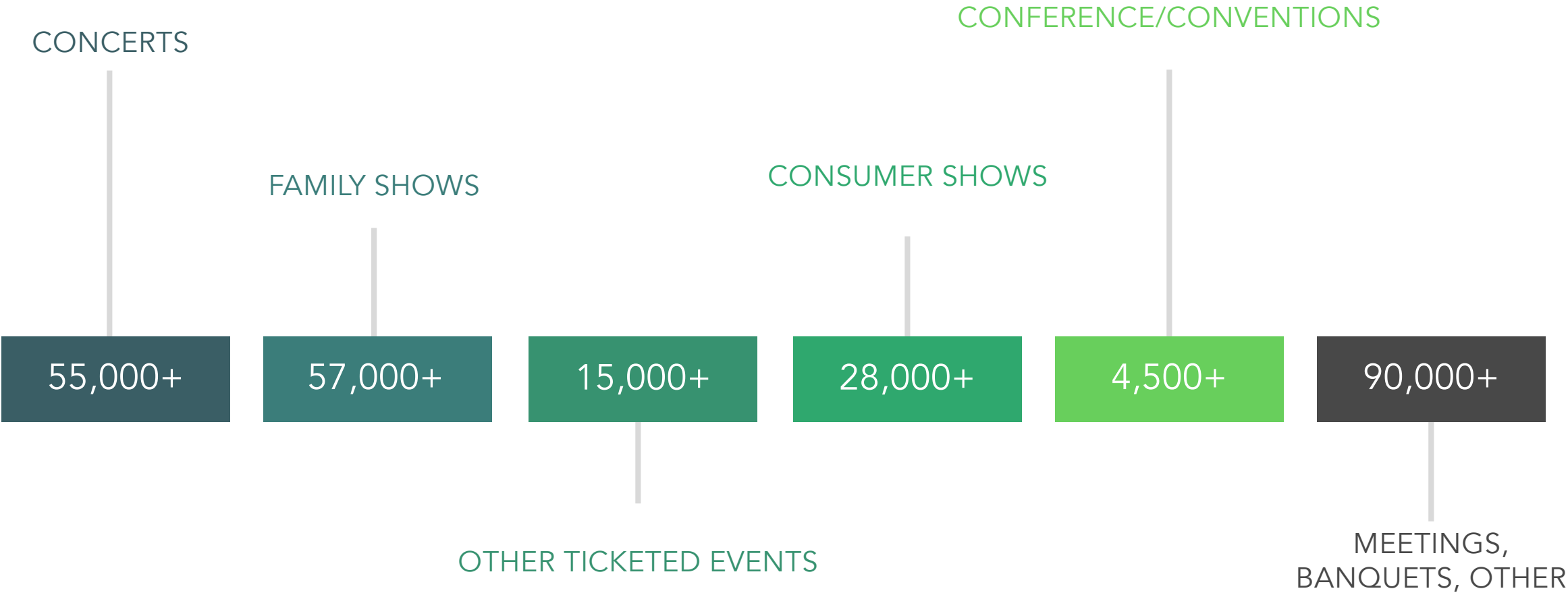
EVENTS BY TYPE

(Stabilized Year)



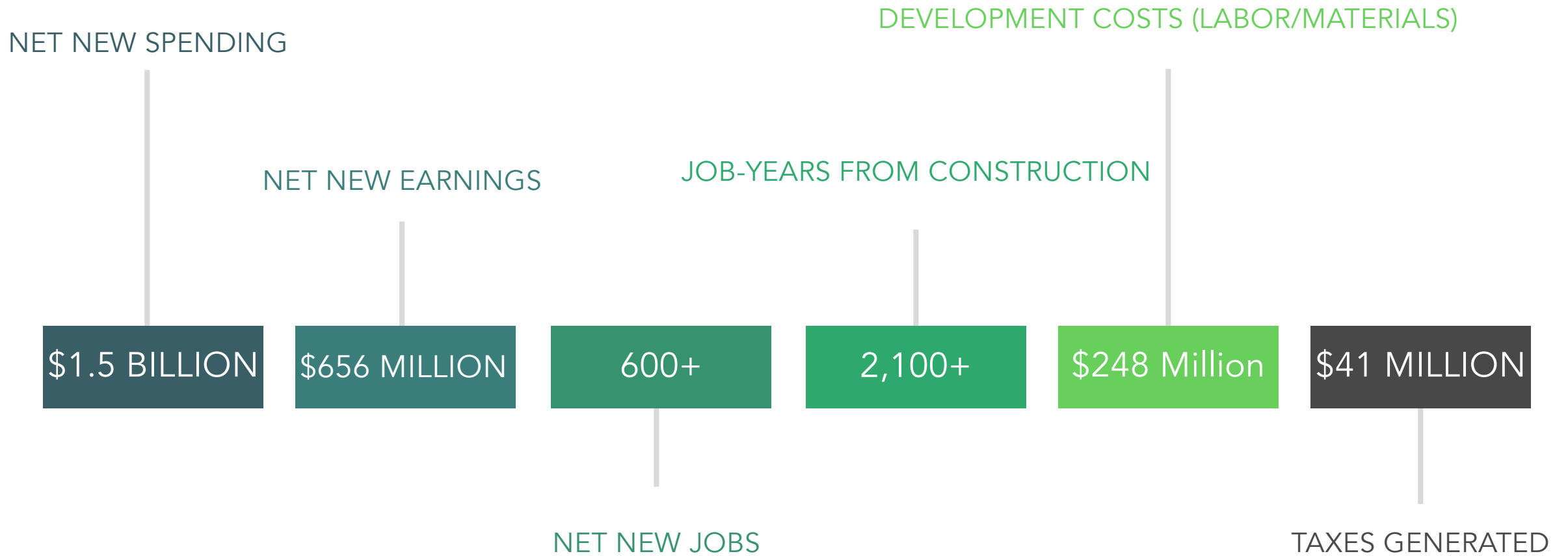
TOTAL ANNUAL ATTENDANCE BY EVENT TYPE

(Stabilized Year)



SUMMARY OF 30-YEAR IMPACTS

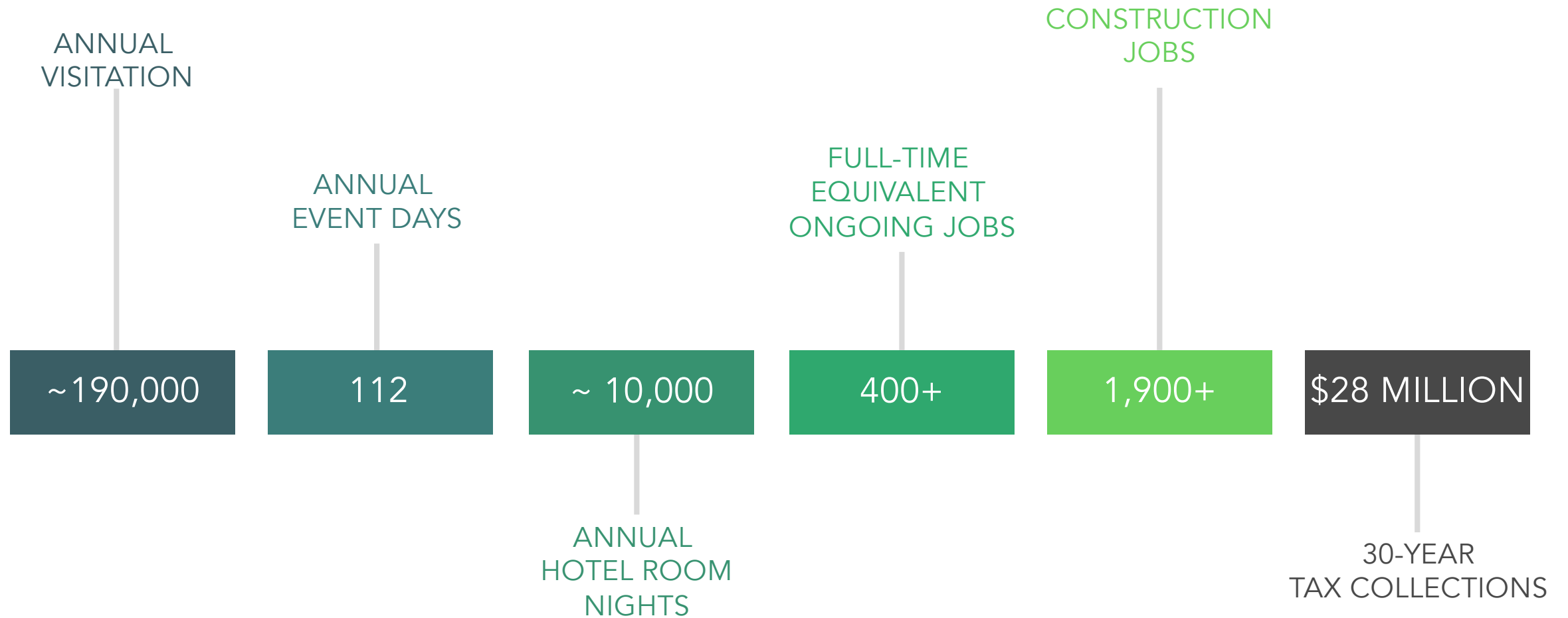
(Stabilized Year)



Projections without Meeting Space

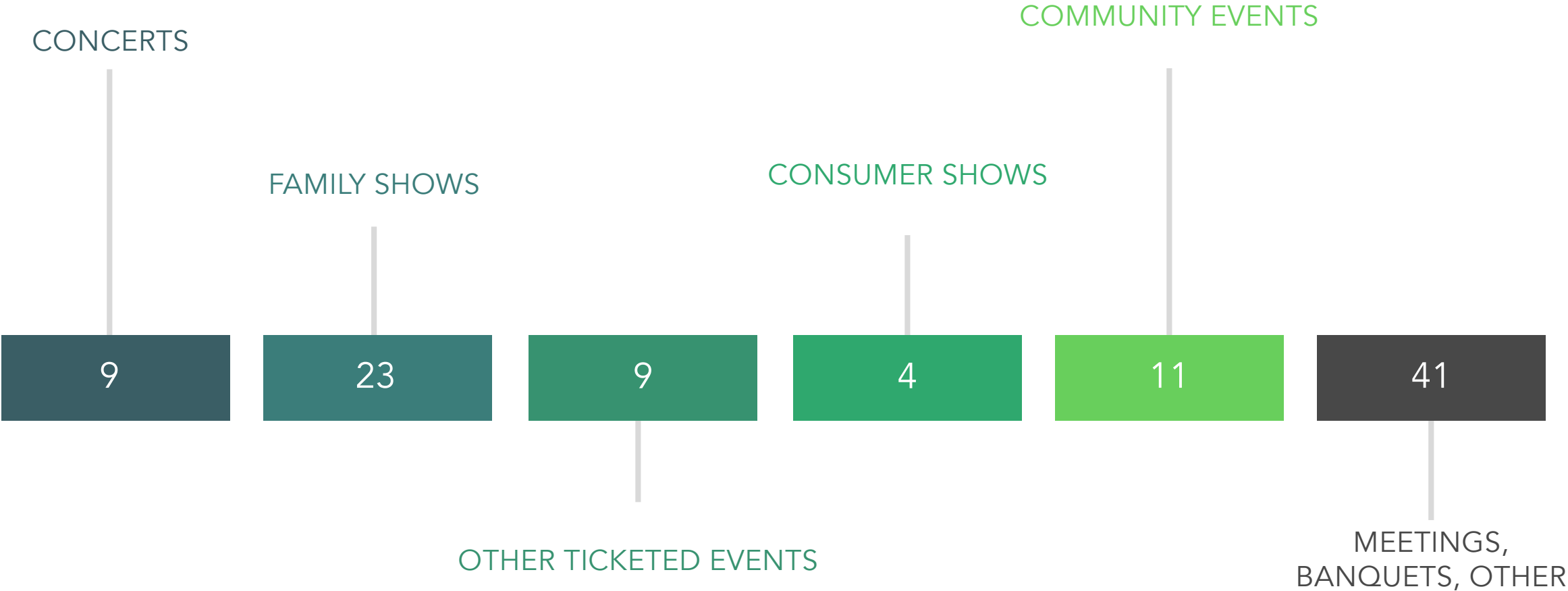
PROJECT & IMPACT HIGHLIGHTS

(Arena without Ballroom & Meeting Space)



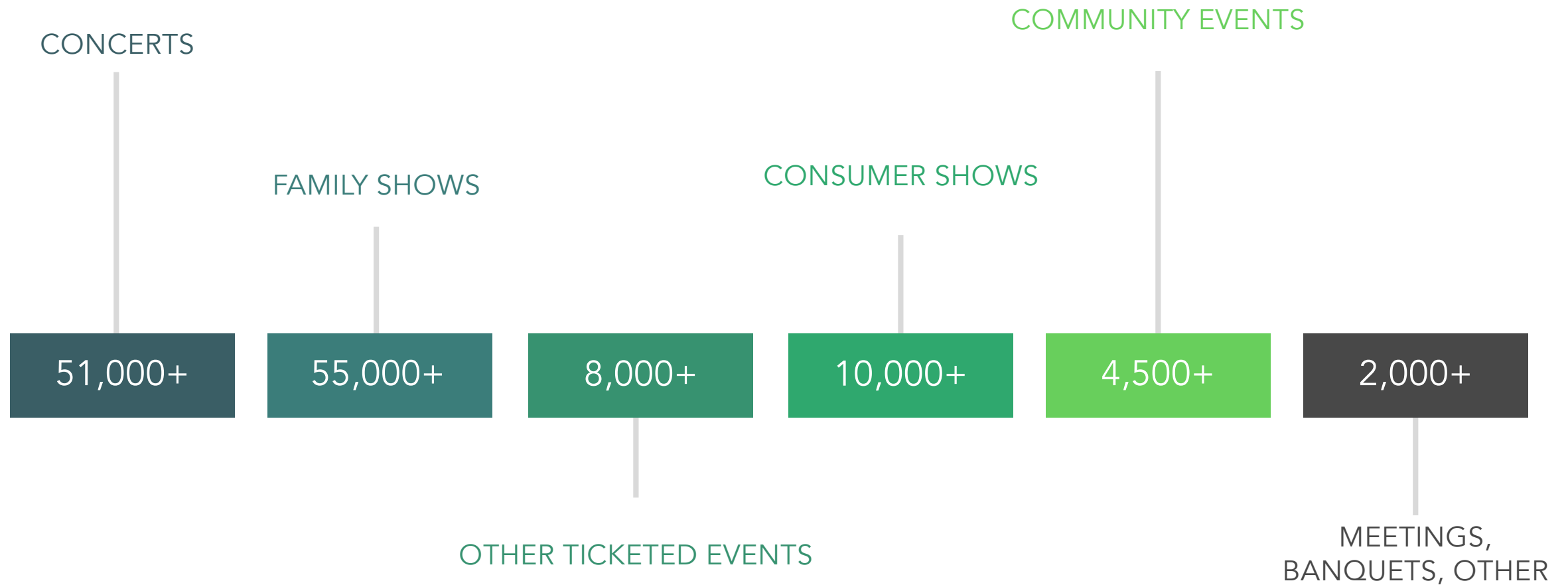
EVENTS BY TYPE

(Stabilized Year)



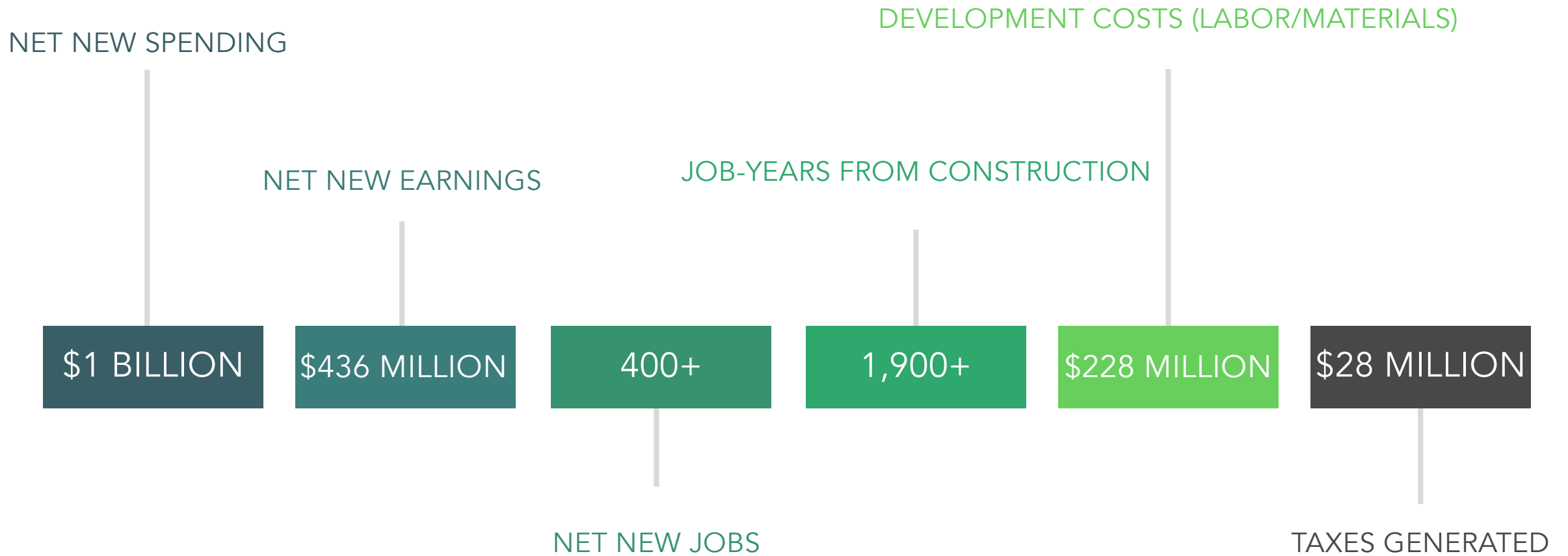
TOTAL ANNUAL ATTENDANCE BY EVENT TYPE

(Stabilized Year)



SUMMARY OF 30-YEAR IMPACTS

(Stabilized Year)



Event Plaza Inspirations

Fiserv Forum

Location: Milwaukee, WI
Plaza Size: 30 acres

Key Findings: The Fiserv Forum is one of the newest jewels of the NBA arena market. This \$524 million arena opened in 2019. Outside of this arena, is the “Deer District” an outdoor plaza space that is utilized by the team and the community. The “Deer District” includes a beer garden with a jumbotron, retail space, and space for concerts and outdoor recreation.

This plaza space outside of the Fiserv Forum presents ideas to how the JBA can create a synergy around the arena and further promote event days and community engagement.



Arts Festival Plaza

Location: El Paso, TX

Key Takeaway: The Arts Festival Plaza, located in Downtown El Paso, is situated in between the El Paso Museum of Art and the Plaza Theatre. This plaza has been used as a music venue, an outdoor theater, and a community gathering space.

The Arts Festival Plaza is a great example showing how the plaza space outside the new JBA could be set up. The Arts Festival Plaza is very flexible and can host events year-round.



Midtown Plaza

Location: Carmel, IN
Plaza Size: 14,000 square feet

Key Findings: The Midtown Plaza, located in Carmel, Indiana, is part of the City's project to revitalize the old industrial area, just south of the Arts & Design District. This \$4.4 million project anchors a mixed-use development of surrounding restaurants, breweries, apartments, and corporate headquarters. The plaza features green spaces, community tables, benches, a big video screen, a pool table, and several ping pong tables.

The Midtown Plaza is a great example of how a simple space with furniture, nice landscaping, and recreation activities for all ages can activate surrounding developments and act as a community gathering space.



Texas Lottery Plaza

Location: Arlington, TX
Plaza Size: 25,000+ square feet

Key Takeaway: The Texas Lottery Plaza, located in Arlington, Texas, is part of the Toyota Music Factory. This plaza is surrounded by restaurants and bars and is consistently activated by local bands playing on the plaza stage every weekend. The plaza acts as a community gathering space, an entertainment hub, and an event space.

The Texas Lottery Plaza is relevant due to its location within the Toyota Music Factory and its flexibility to entertain and host events amongst larger ticketed event venues.



Bankers Life Fieldhouse

Location: Indianapolis, IN
Plaza Size: ~1.5 acres

Key Takeaway: Bankers Life Fieldhouse, where the NBA's Indiana Pacers play their home games, is situated in downtown Indianapolis. The Fieldhouse is scheduled to go under a \$360+ million renovation, that will include the development of a new indoor/outdoor plaza. This plaza will be converted into a skating rink in the winter. These renovations are scheduled to start in late 2020 and be completed by late 2022.

While the development of this new, indoor/outdoor plaza at Bankers Life is part of a more than \$300 million renovation, this inclusion of a plaza space and indoor/outdoor flexibility is something to take note of. An indoor/outdoor plaza space at the JBA would protect against weather and be able to host more events throughout the calendar year.



JAMES BROWN ARENA

SEPTEMBER 2020

Perkins&Will

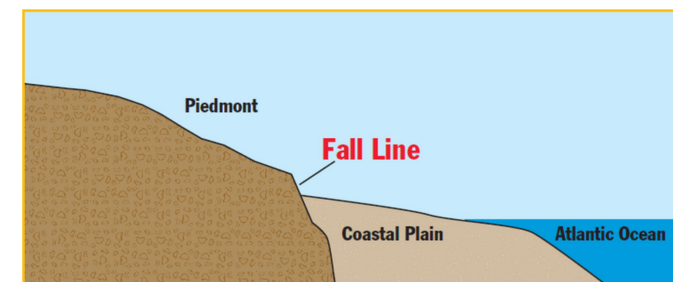
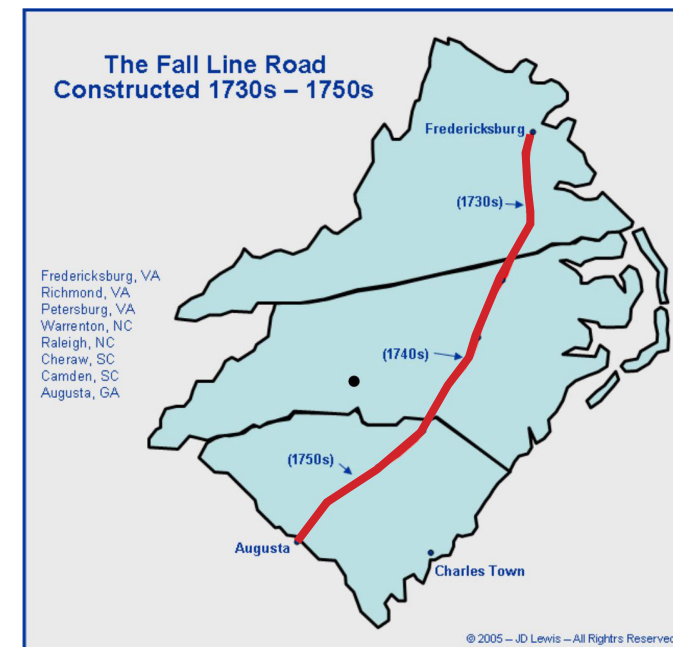
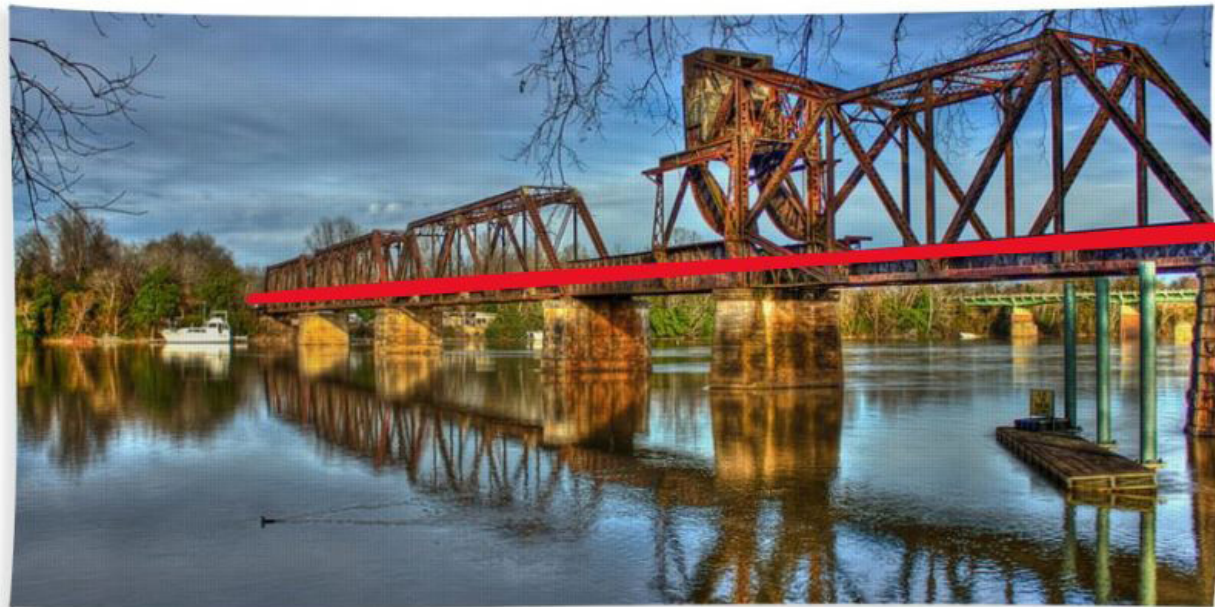
DESIGN STUDY

JAMES BROWN
ARENA



PREPARED FOR:
AUGUSTA – RICHMOND COUNTY
COLISEUM AUTHORITY

DESIGN INSPIRATION





A SPECIAL REQUEST

The gallery guards are here to help you enjoy the Tournament. Military students at Richmond Academy and members of golf teams from a number of Southern colleges serve in this organization and make it possible for large numbers of spectators to see the shots without interfering with the players. Please cooperate with them. Never cross gallery ropes. Thank You!

*Enjoy the Tournament
See it in Comfort!*

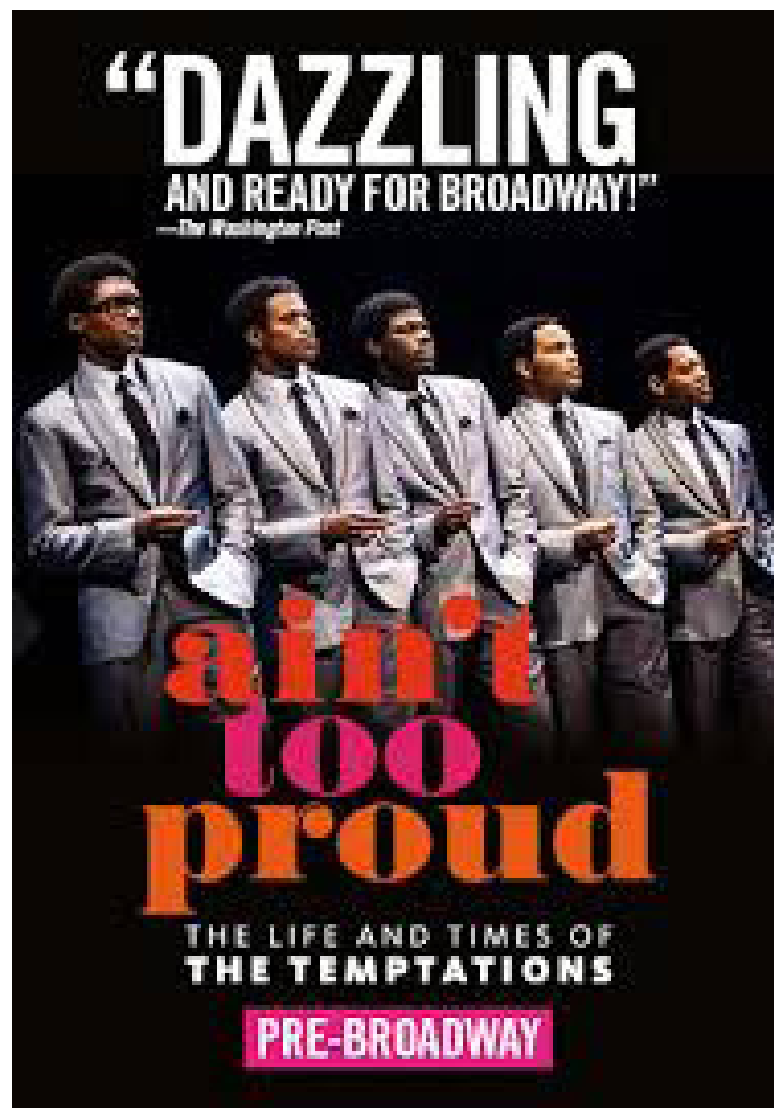
★ indicates star locations where several scenes of action may be observed.
 ● indicates location of concession stands.
 ☒ indicates relief stations for ladies.
 △ indicates relief stations for men.

SCORE CARD—MAXIMUM DISTANCES					
HOLE	PAR	DISTANCE	HOLE	PAR	DISTANCE
1	4	400	10	4	470
2	5	355	11	4	445
3	4	355	12	3	180
4	3	230	13	4	370
5	4	400	14	4	420
6	4	390	15	3	200
7	4	365	16	3	190
8	4	330	17	4	400
9	4	430	18	4	420
TOT.	36	3475	TOT.	36	3475
		TOTAL	72	6950	

AUGUSTA NATIONAL GOLF CLUB COURSE

SUGGESTIONS: No matter how well you may know a player, do not accost him on the golf course. Give him a chance to concentrate on his game.
WALK — never run. Be silent and motionless when a contestant prepares to execute a stroke. Be considerate of other spectators.
Golf is a gentleman's game.

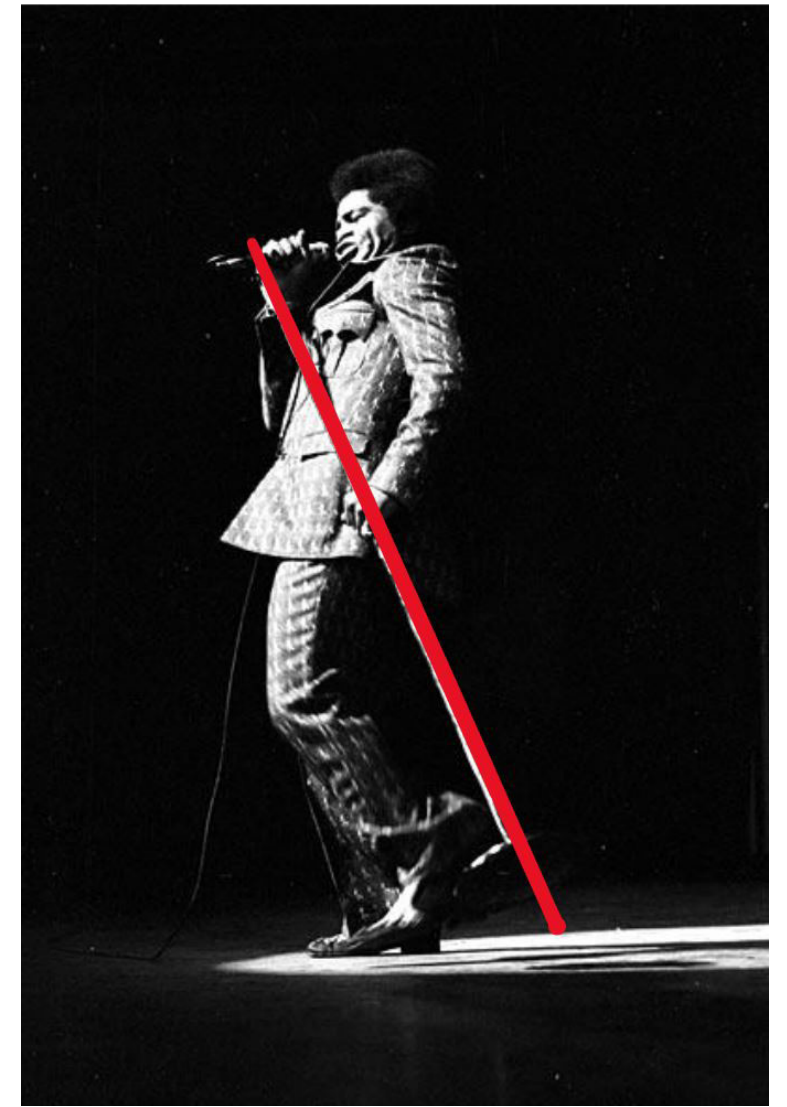
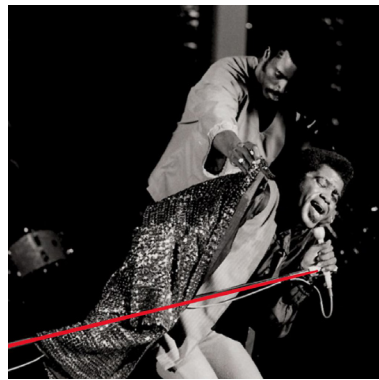
AUGUSTA NATIONAL GOLF CLUB

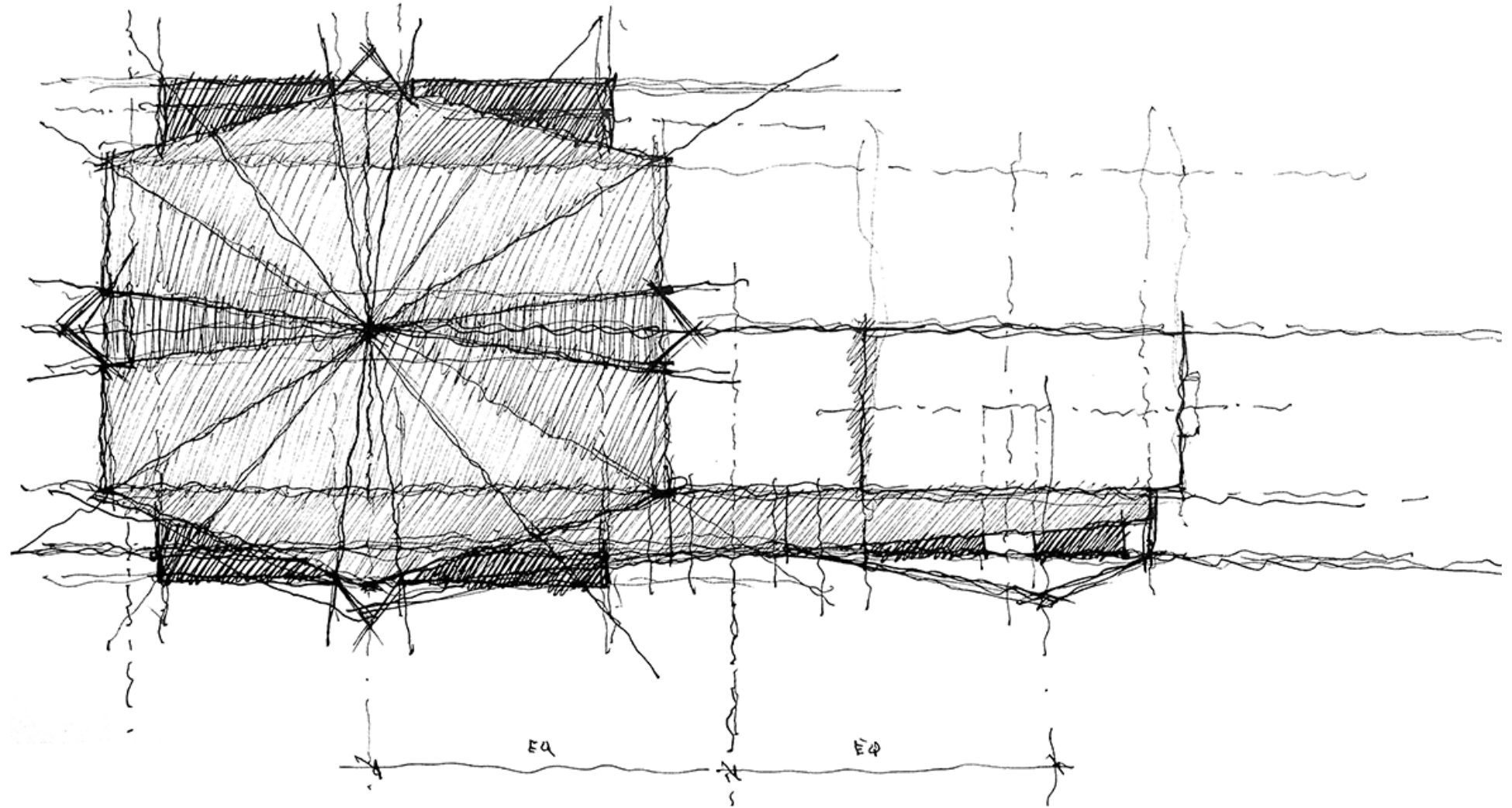


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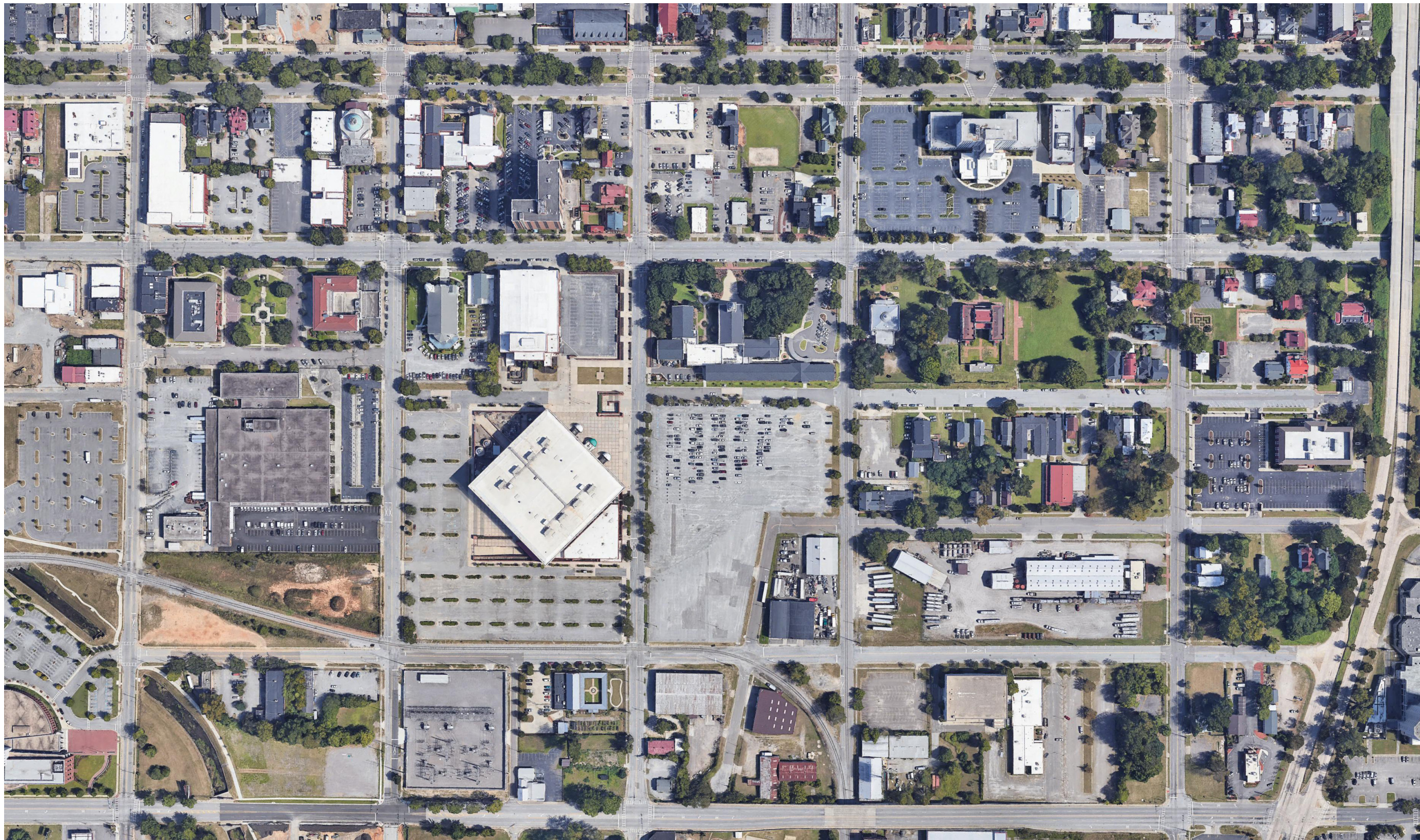
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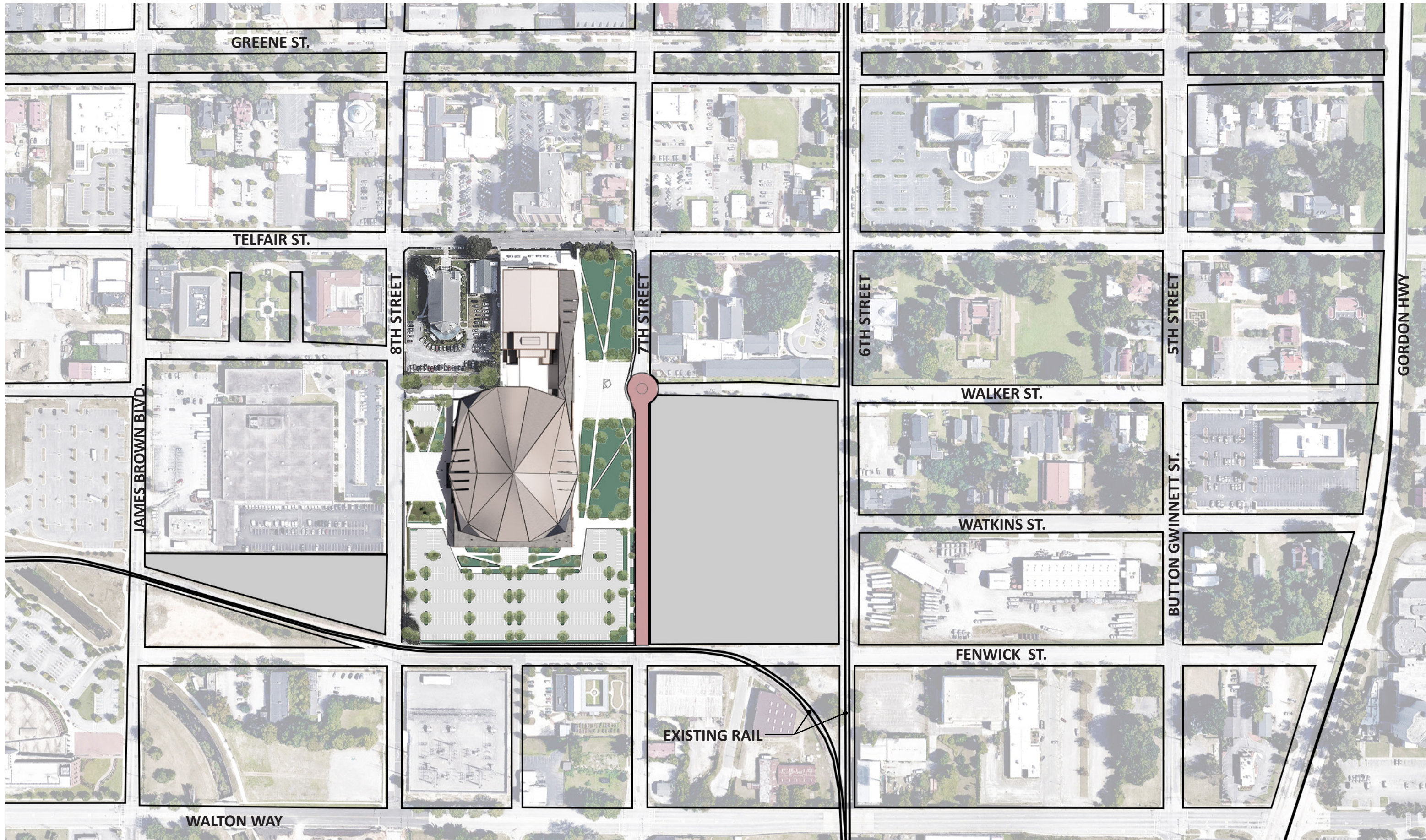






SITE ANALYSIS

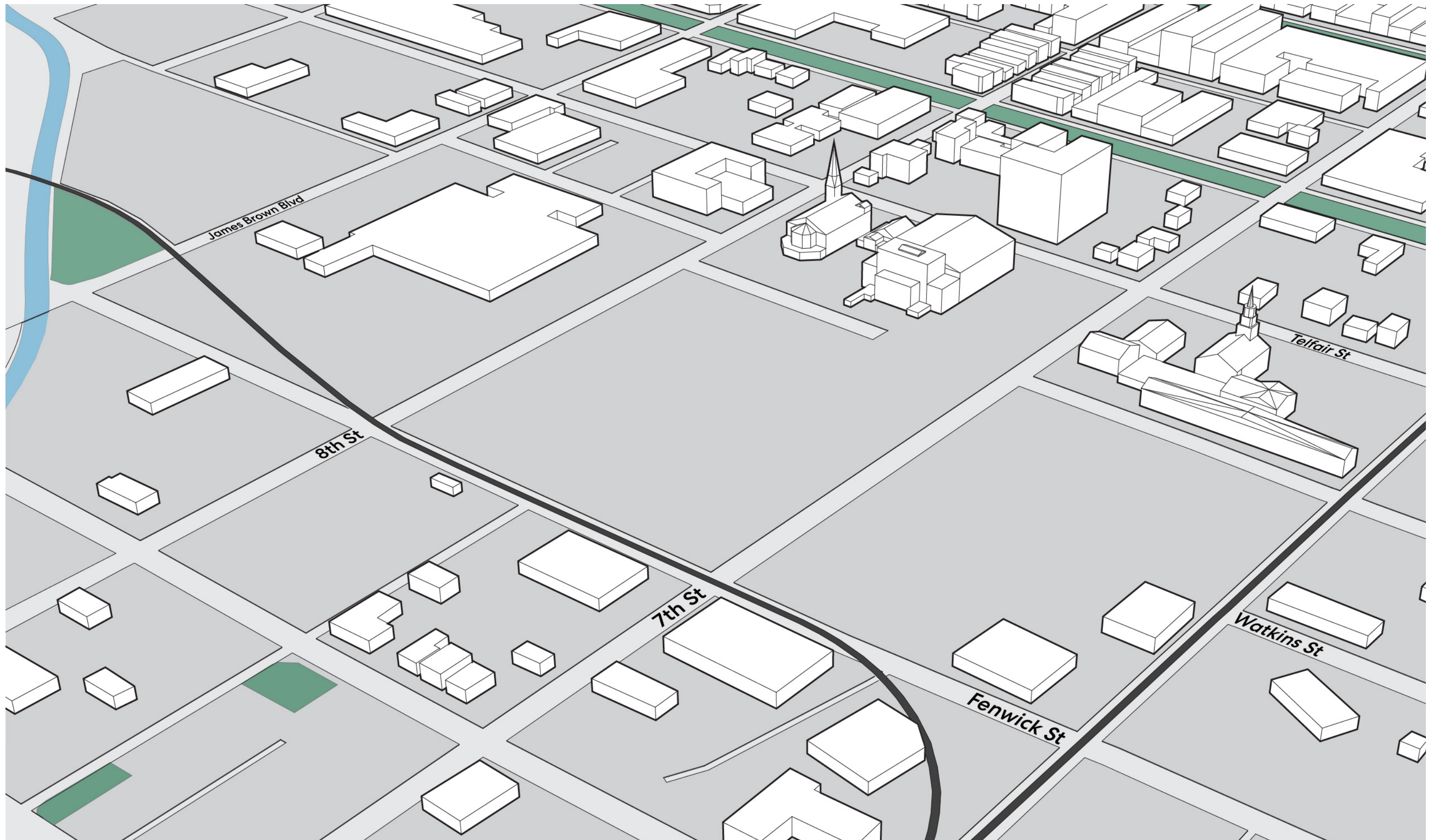


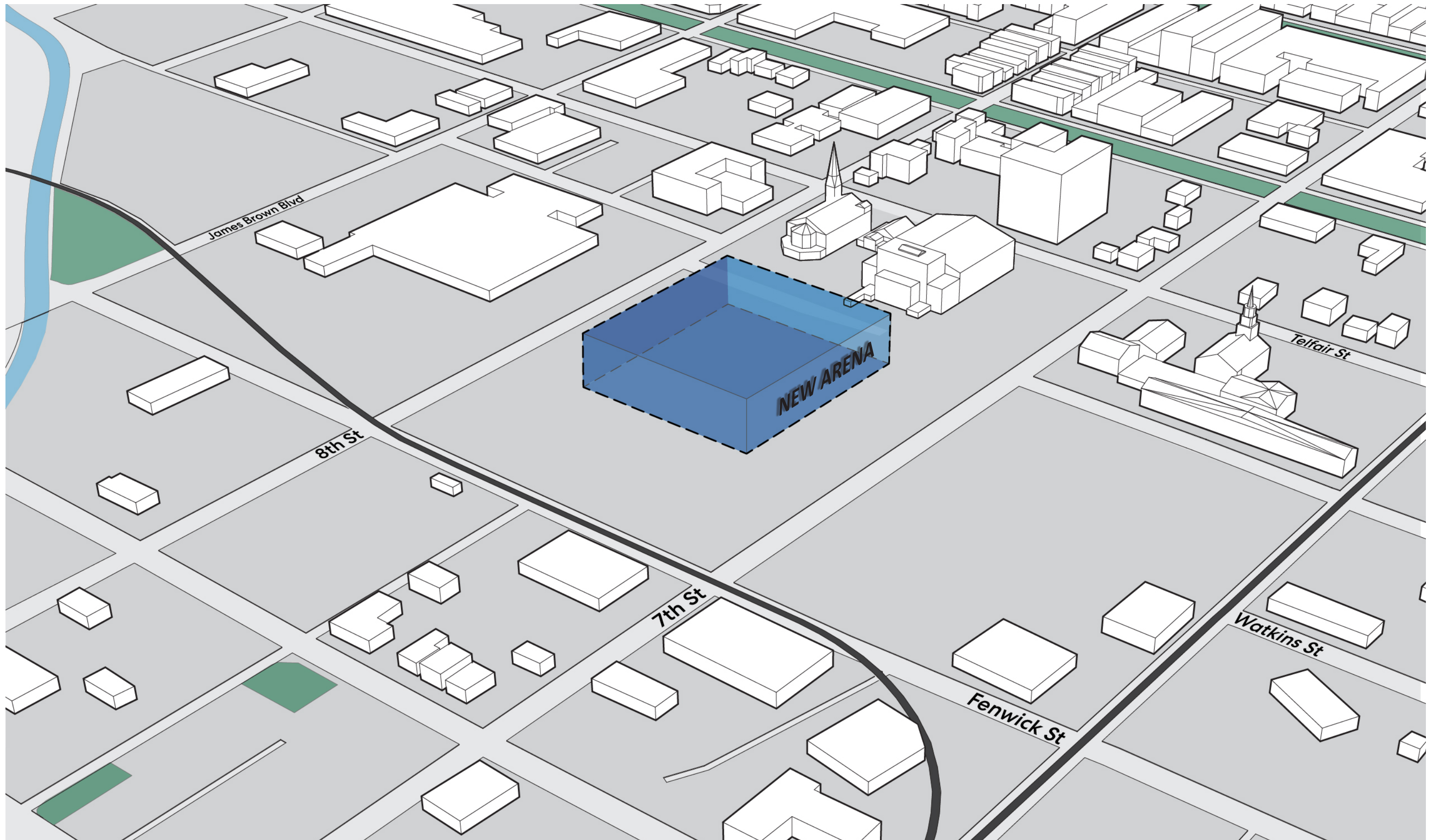


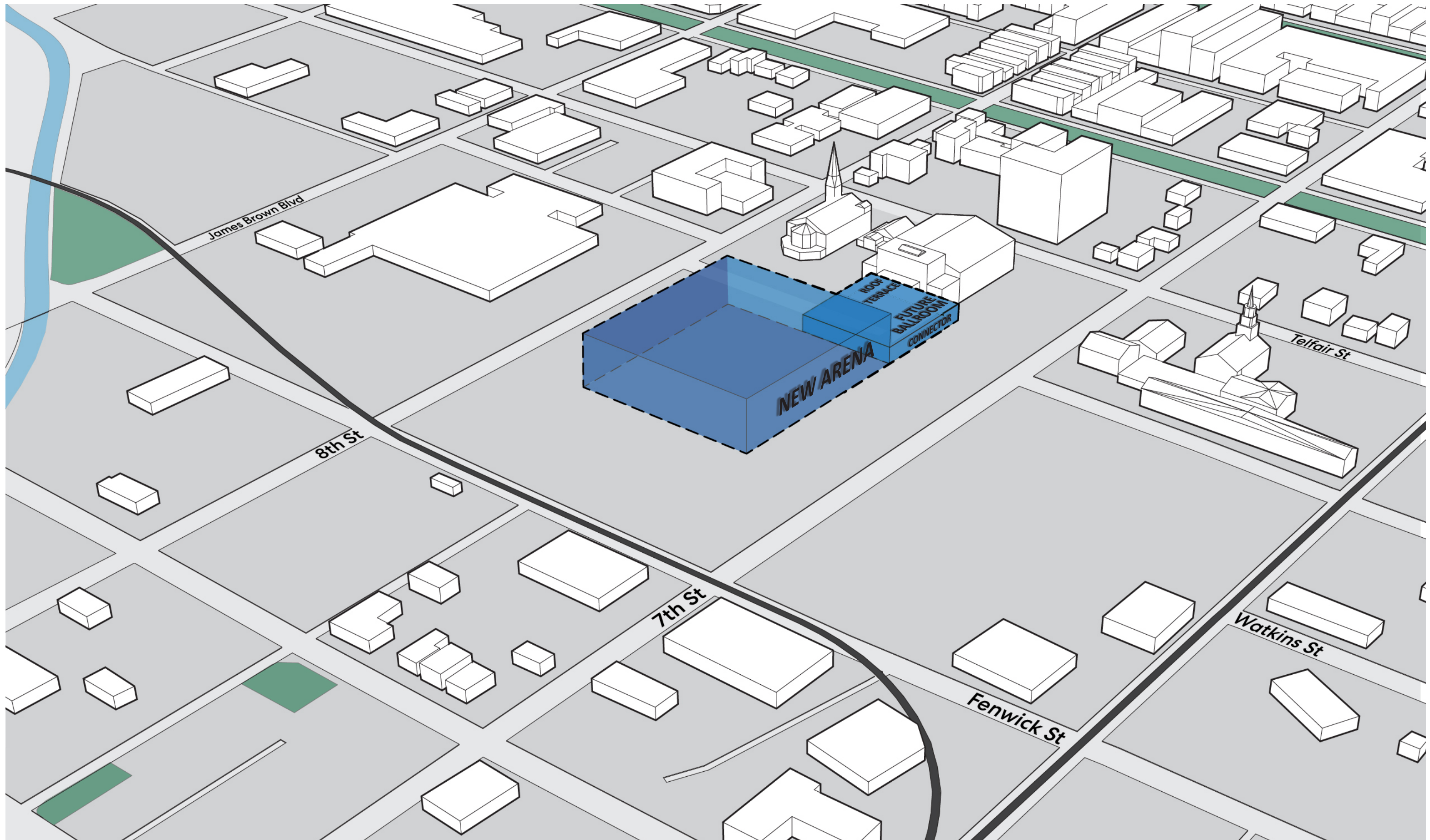
SITE ISOMETRIC

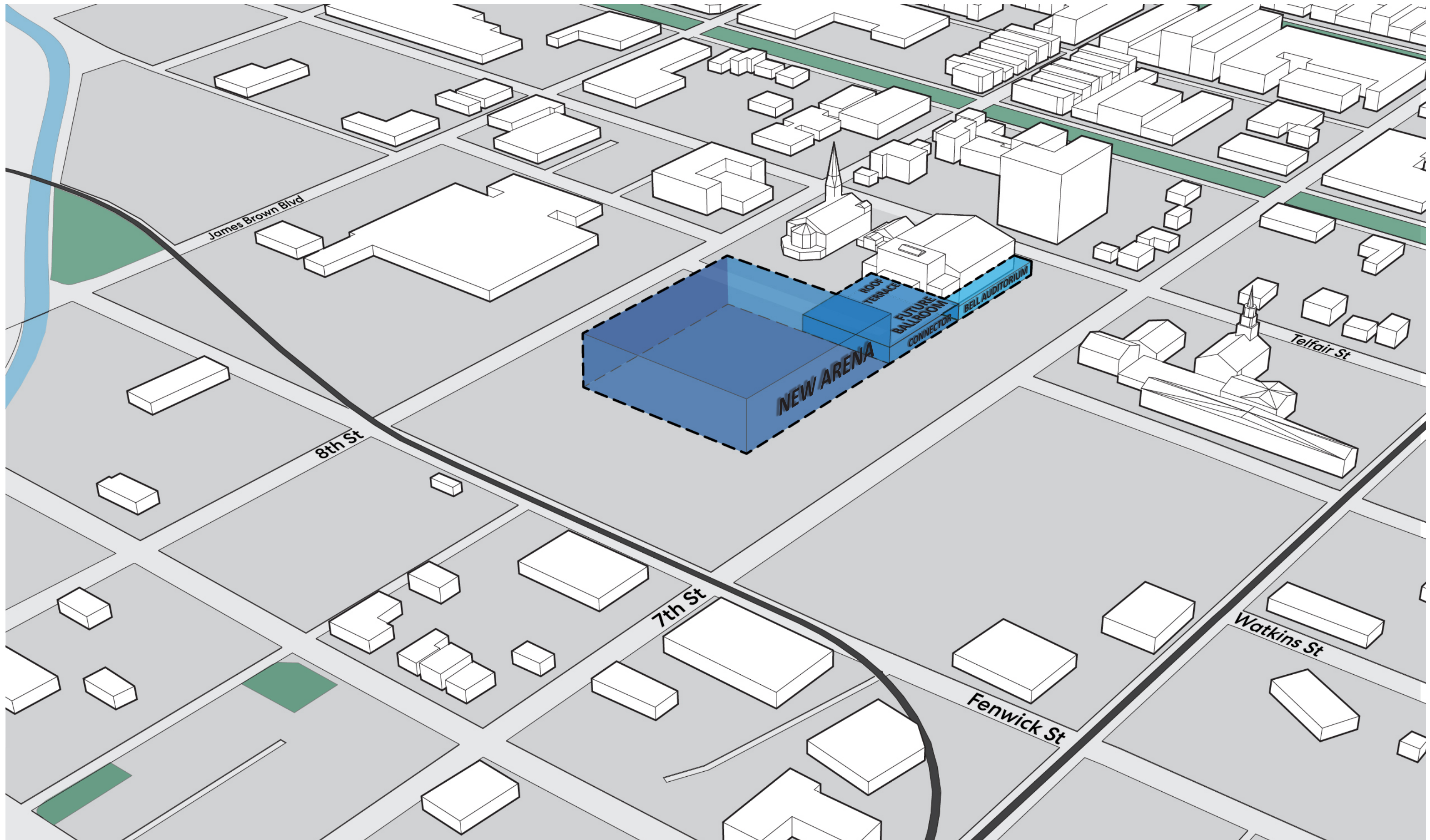


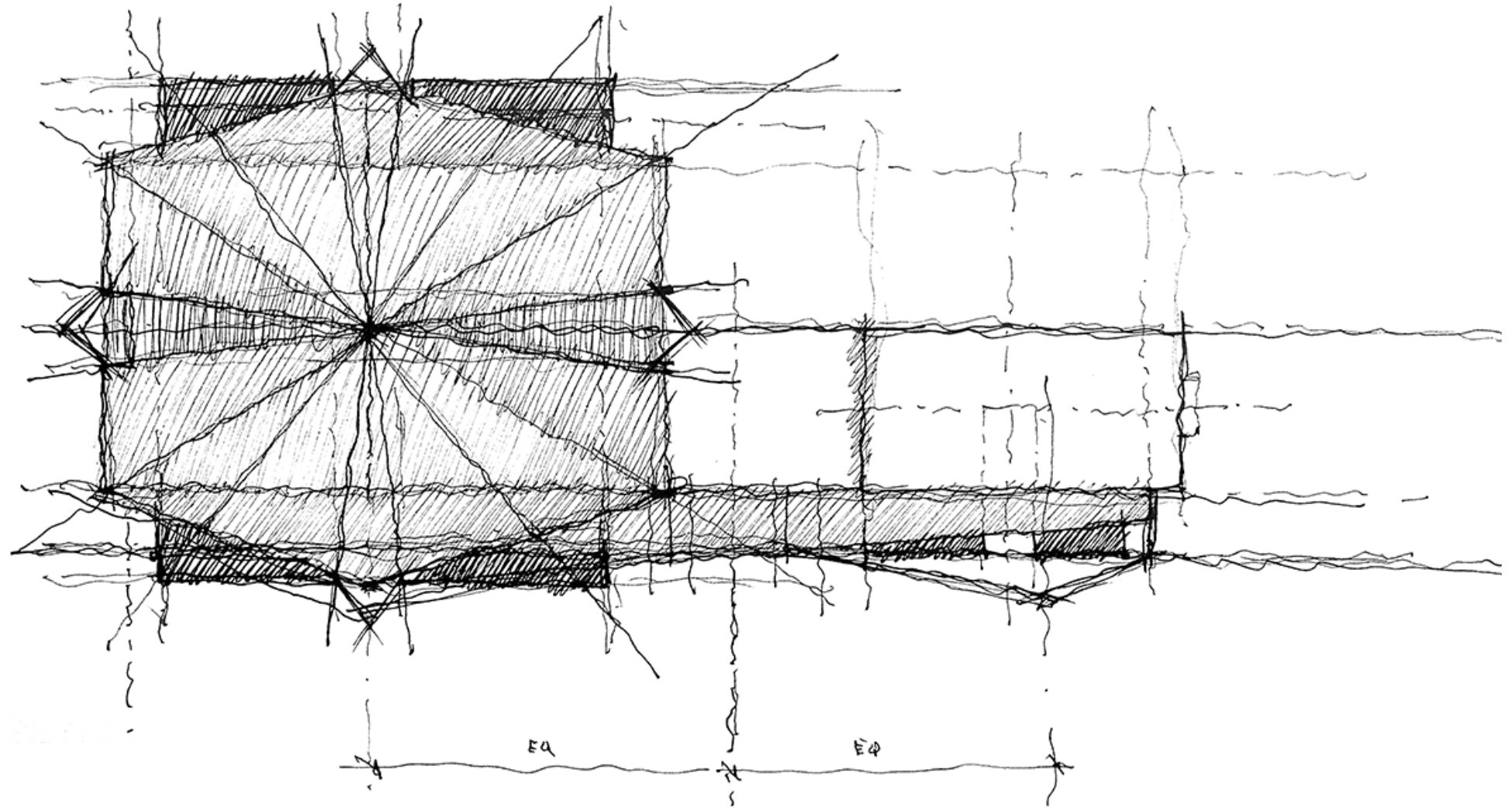


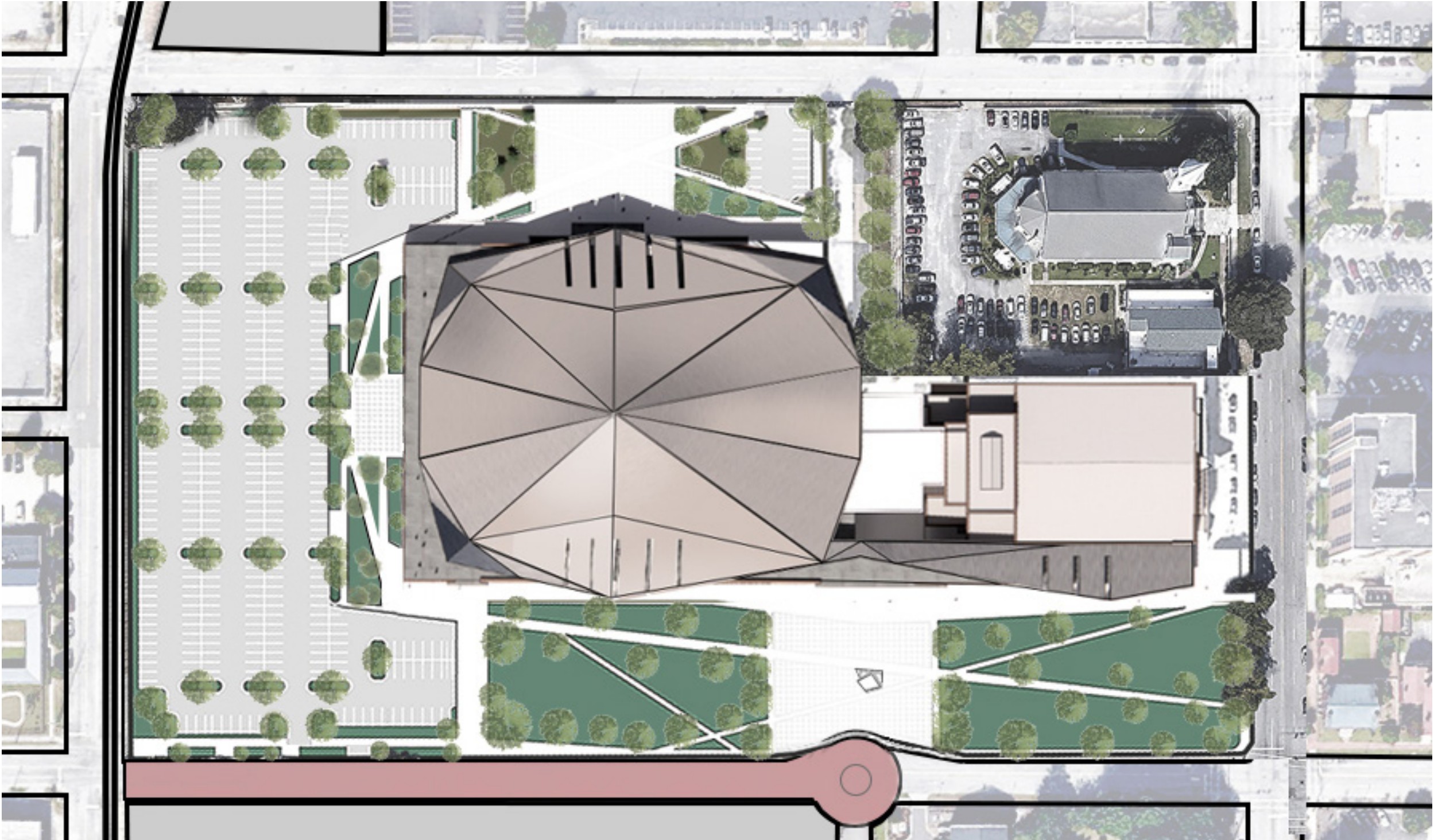


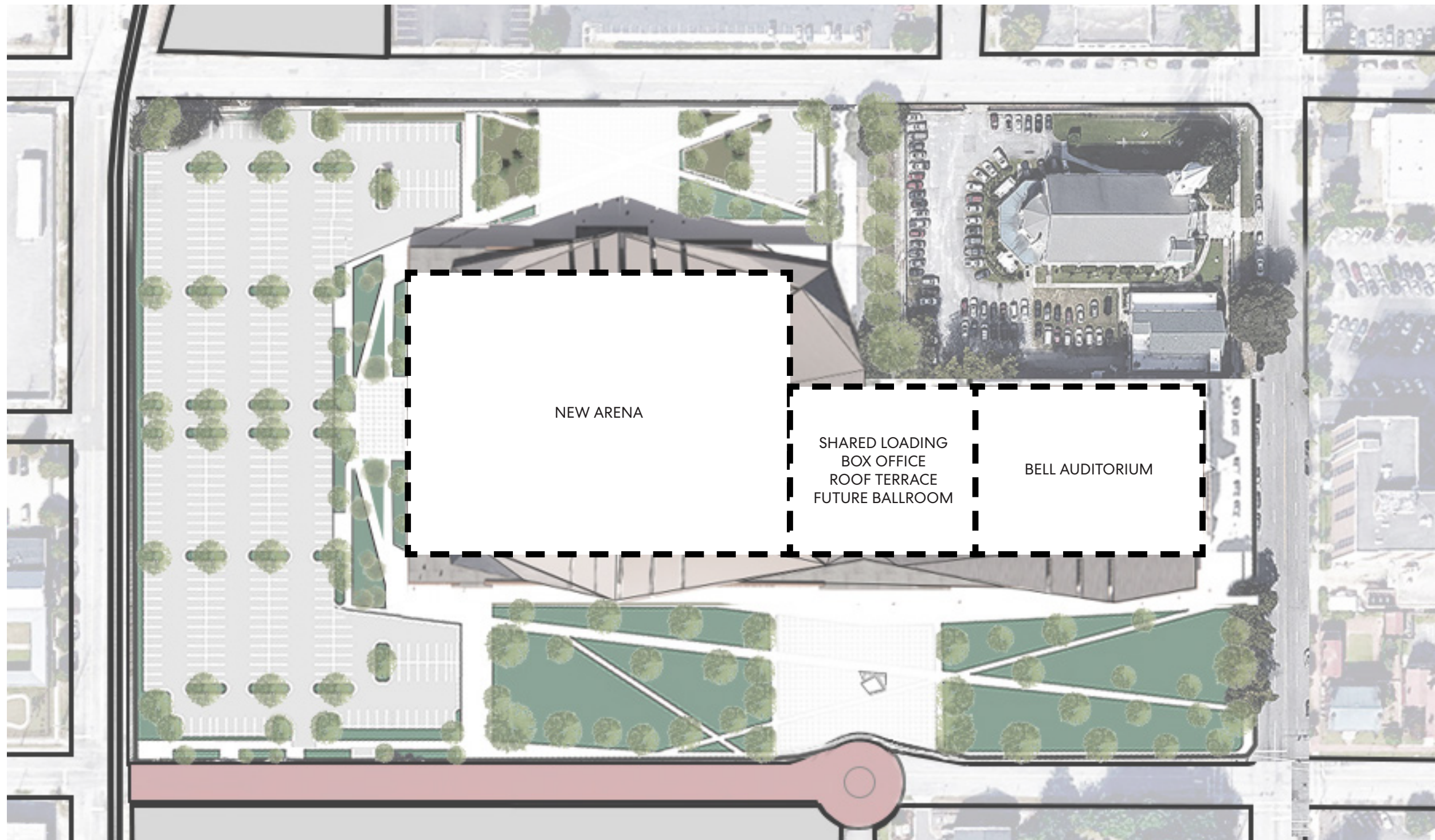


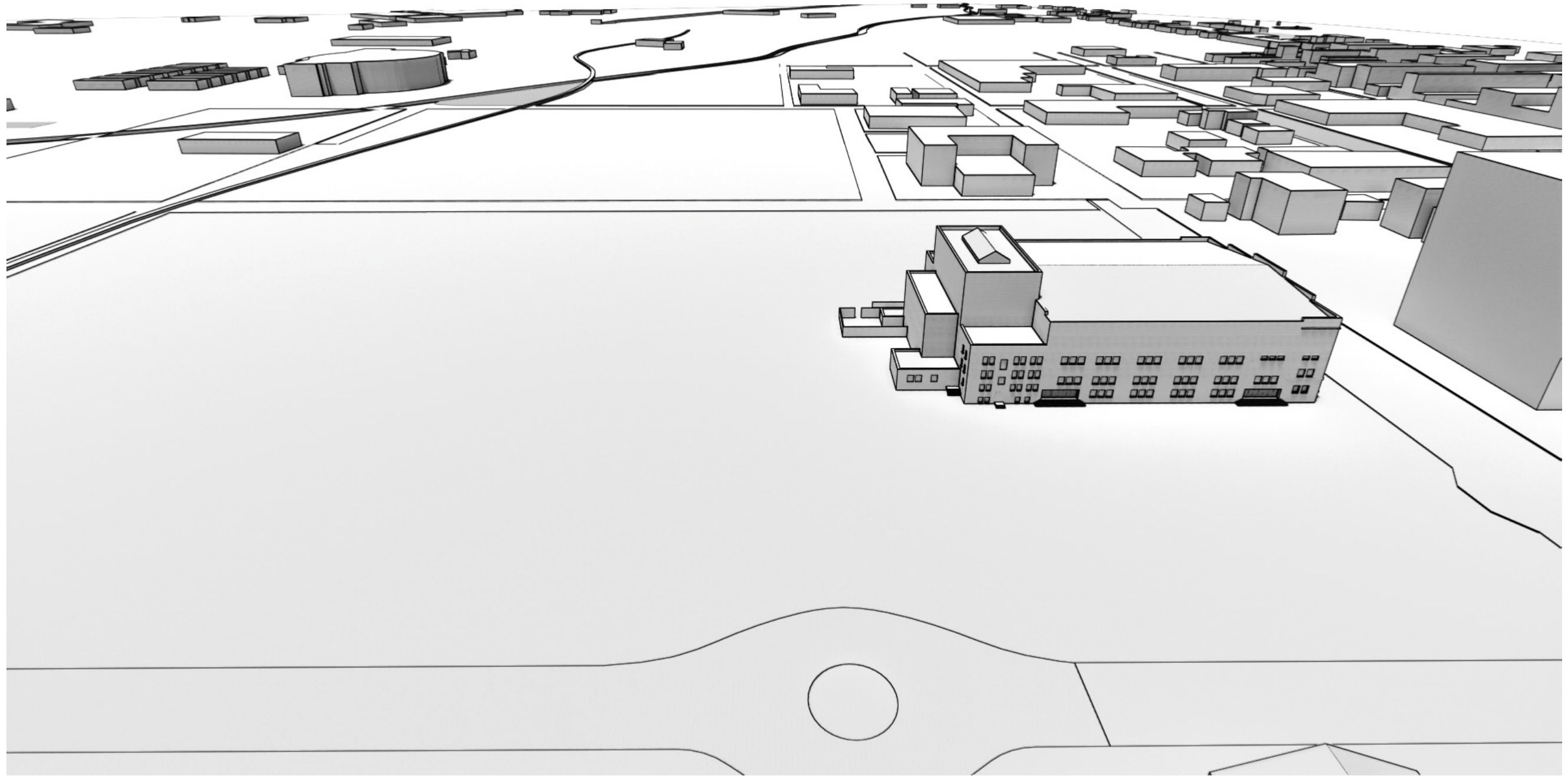


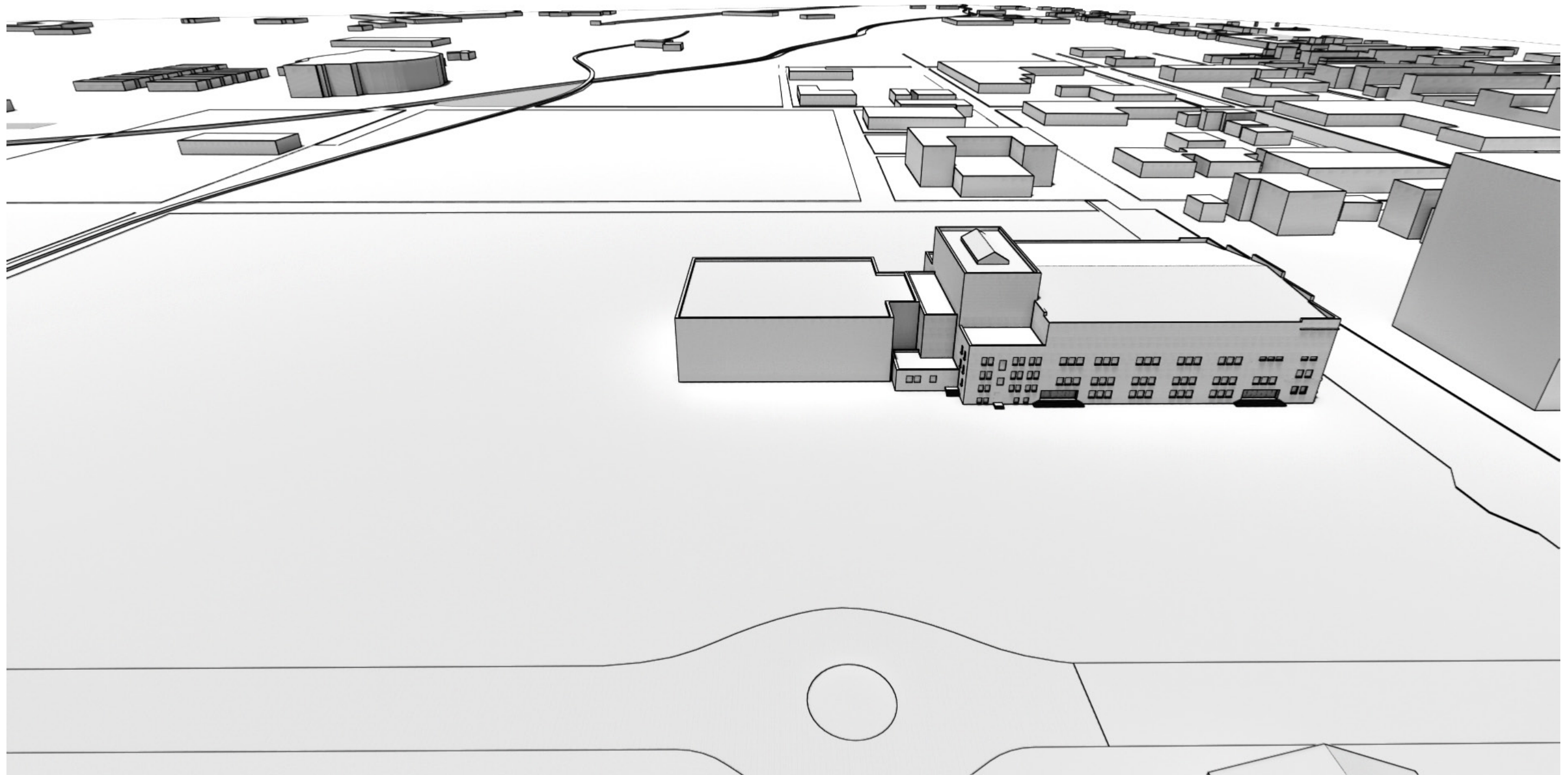


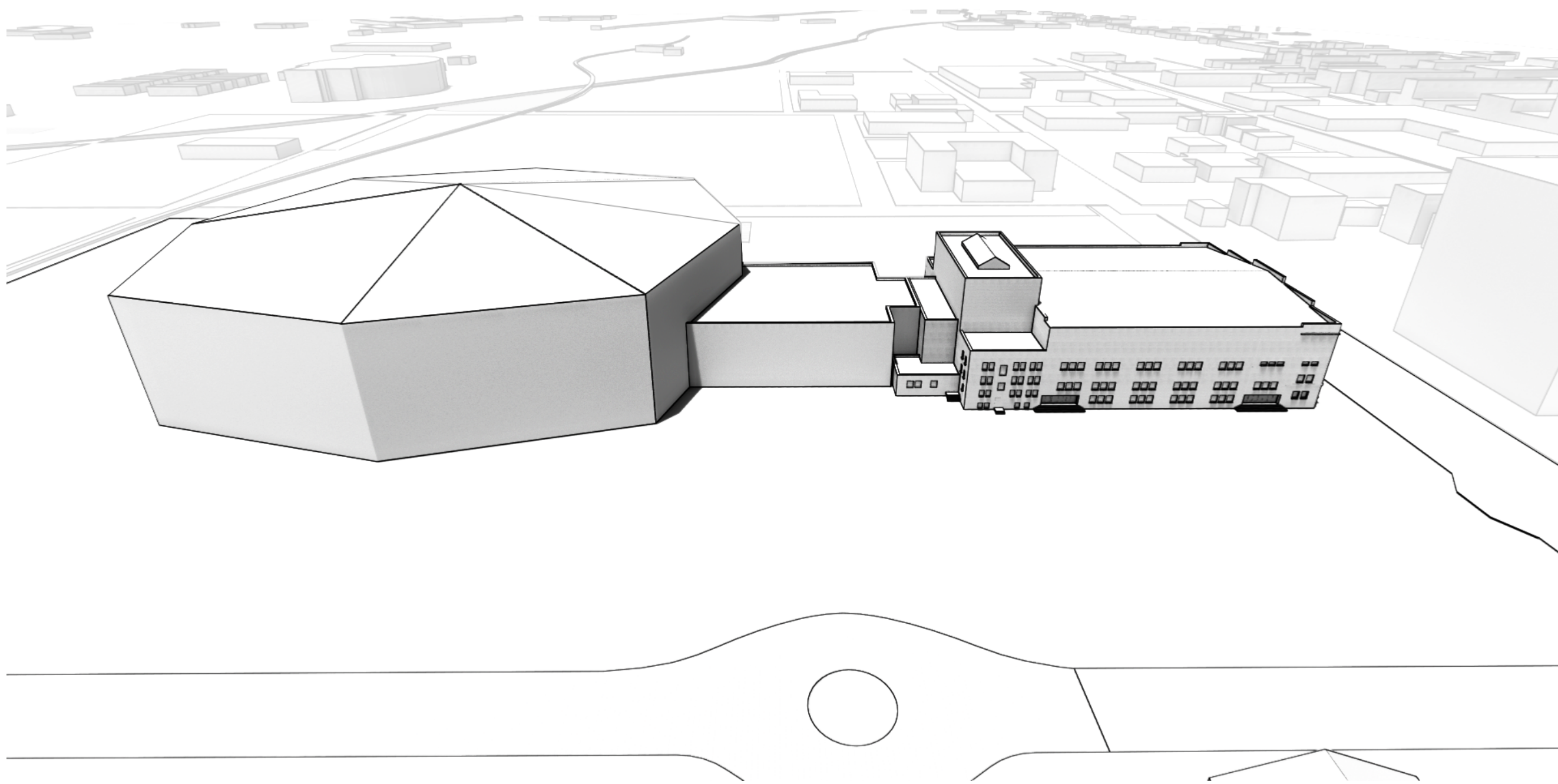


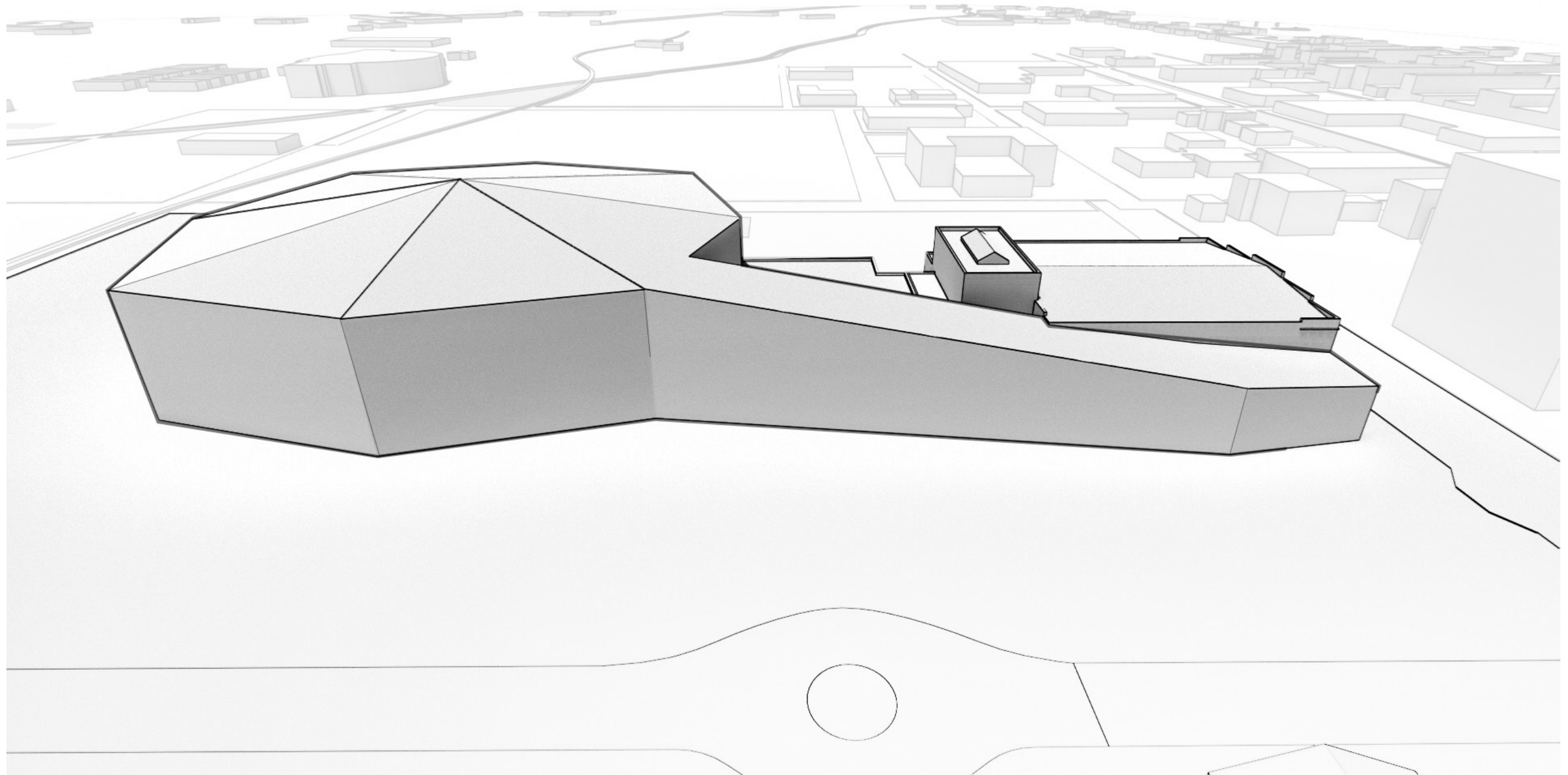


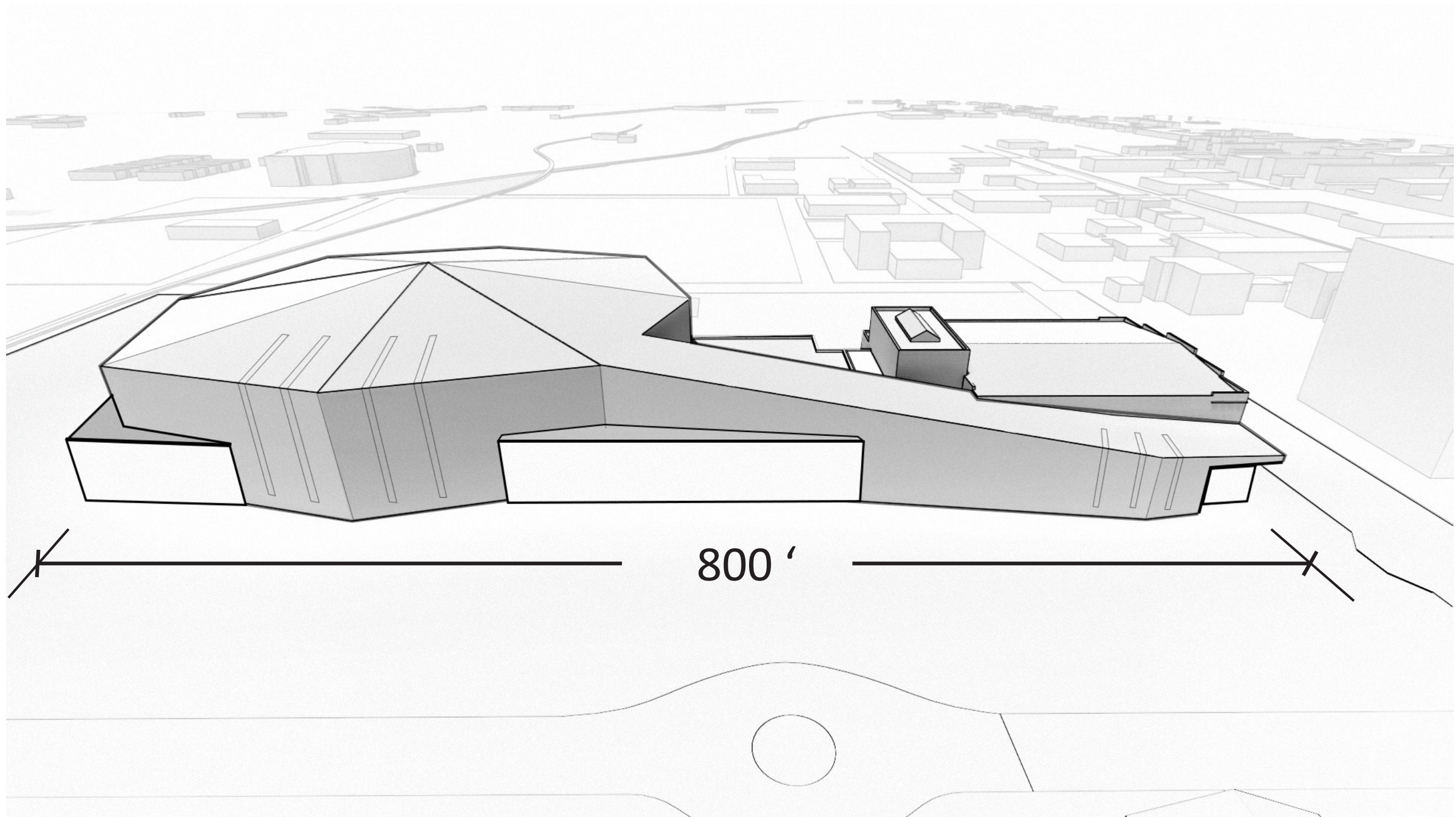




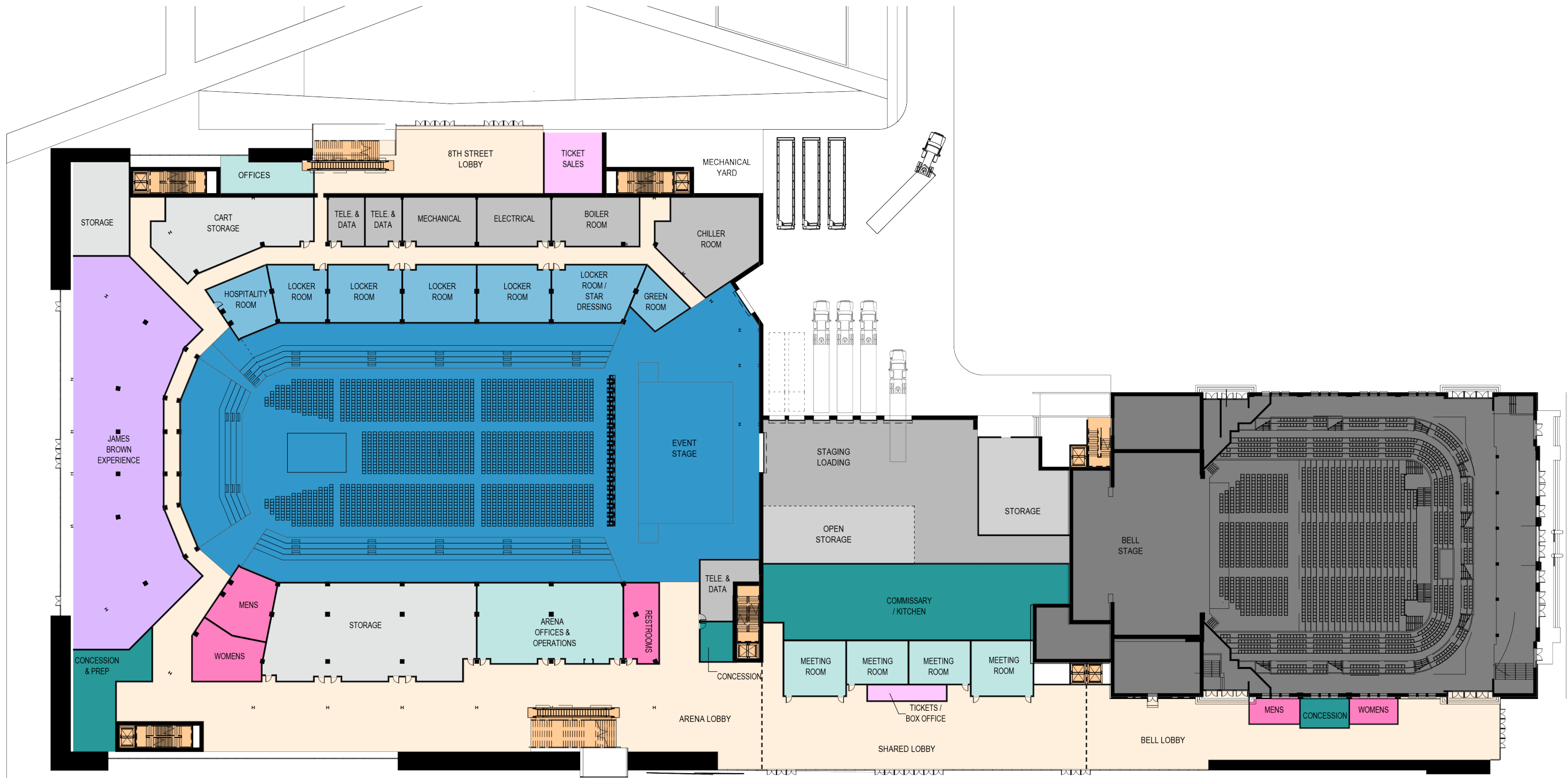


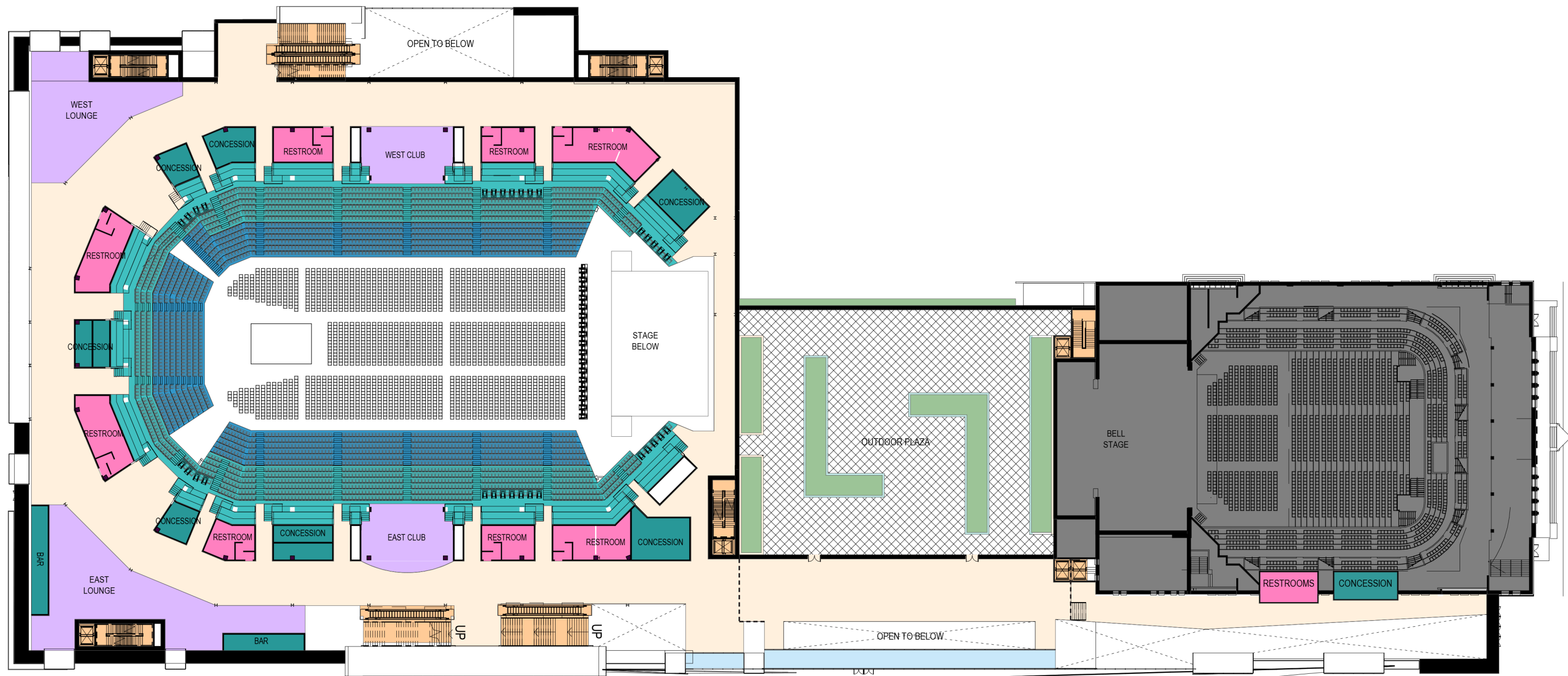


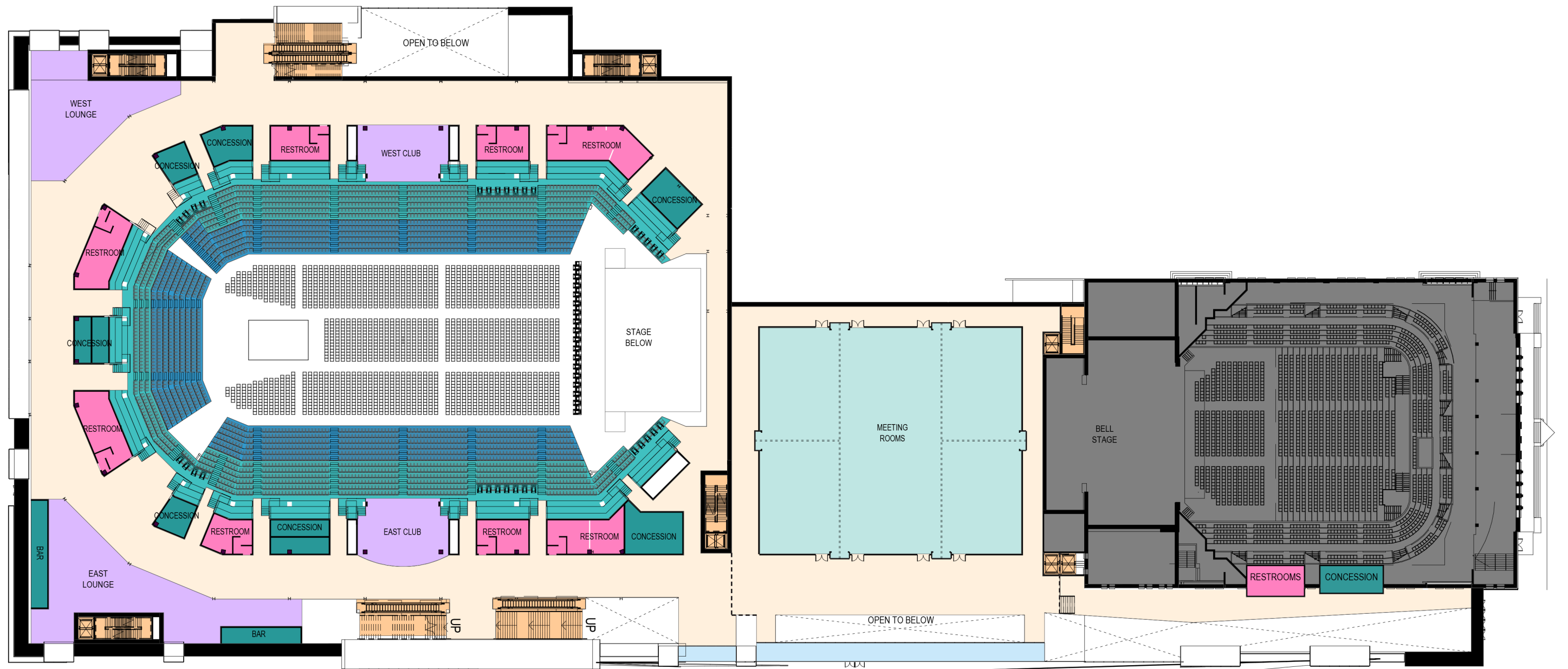


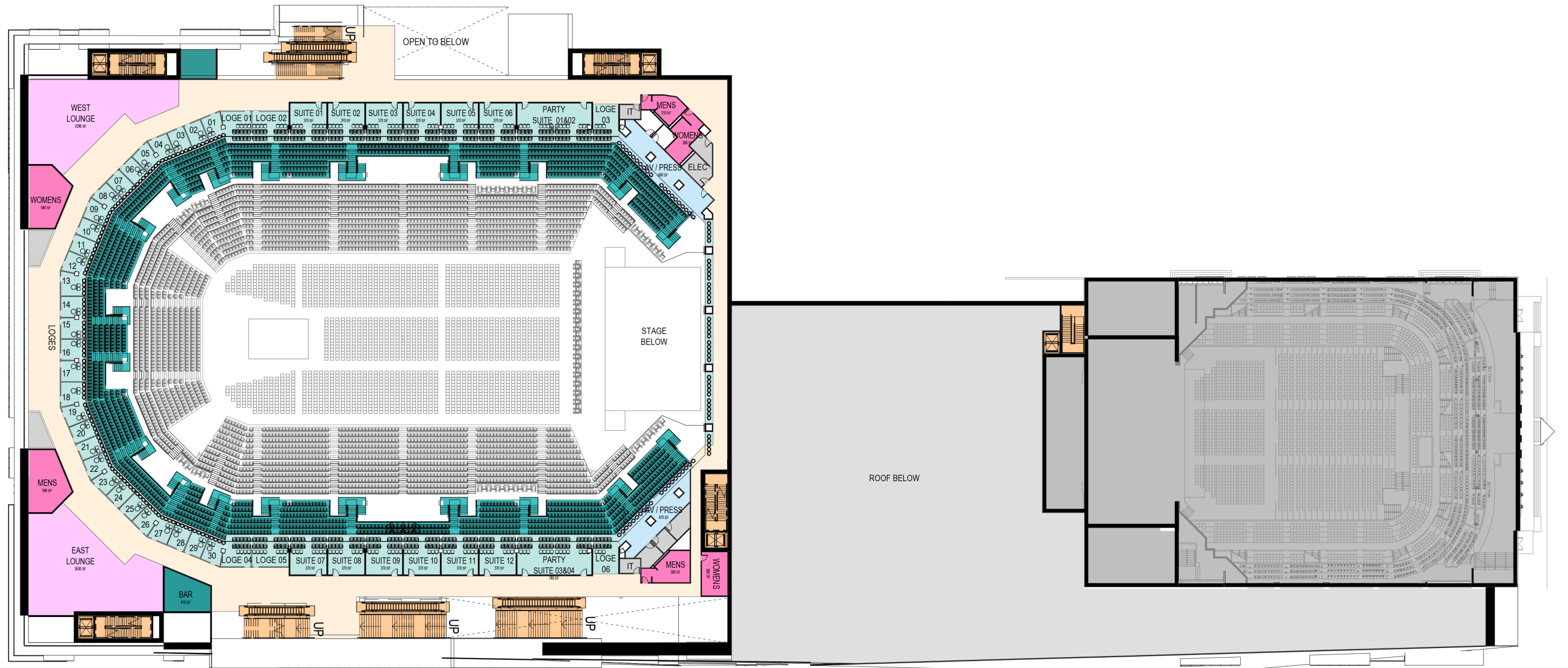


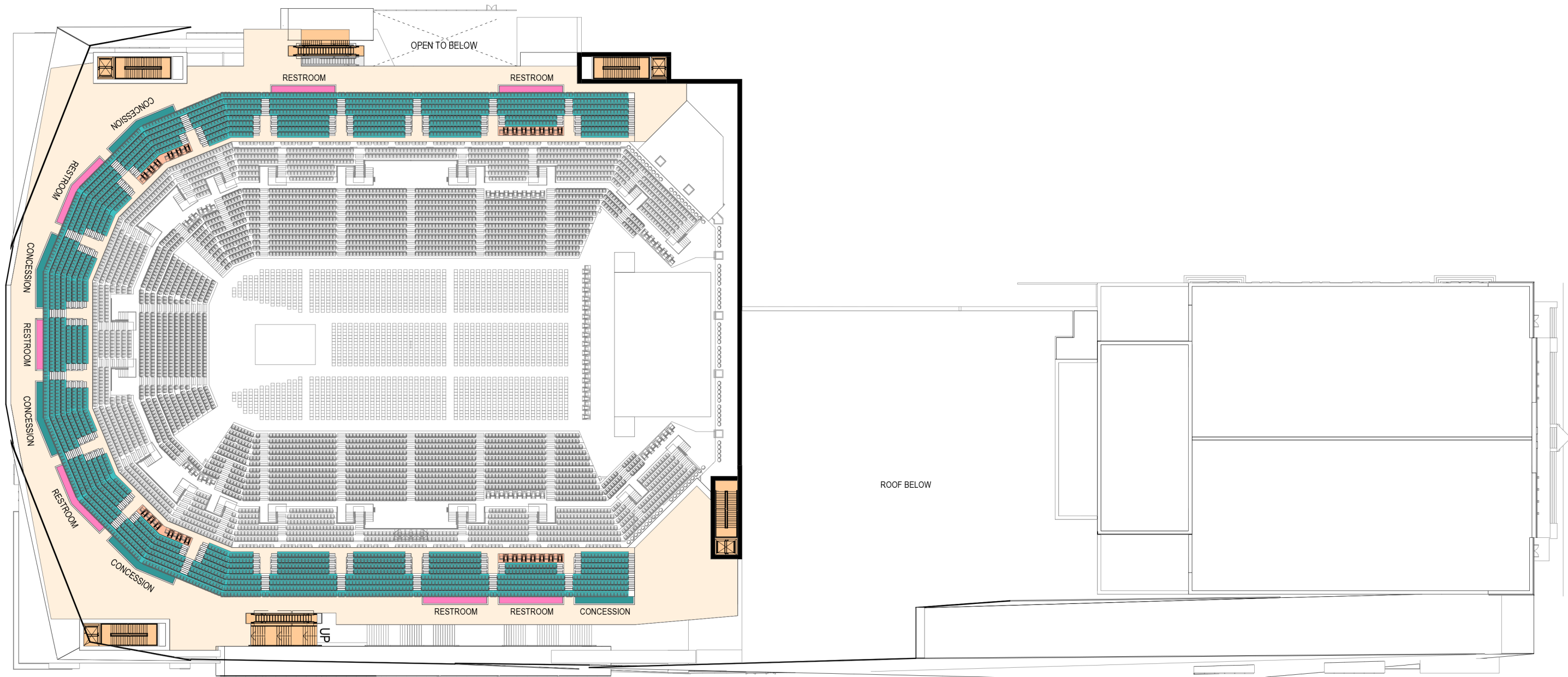
FLOOR PLANS



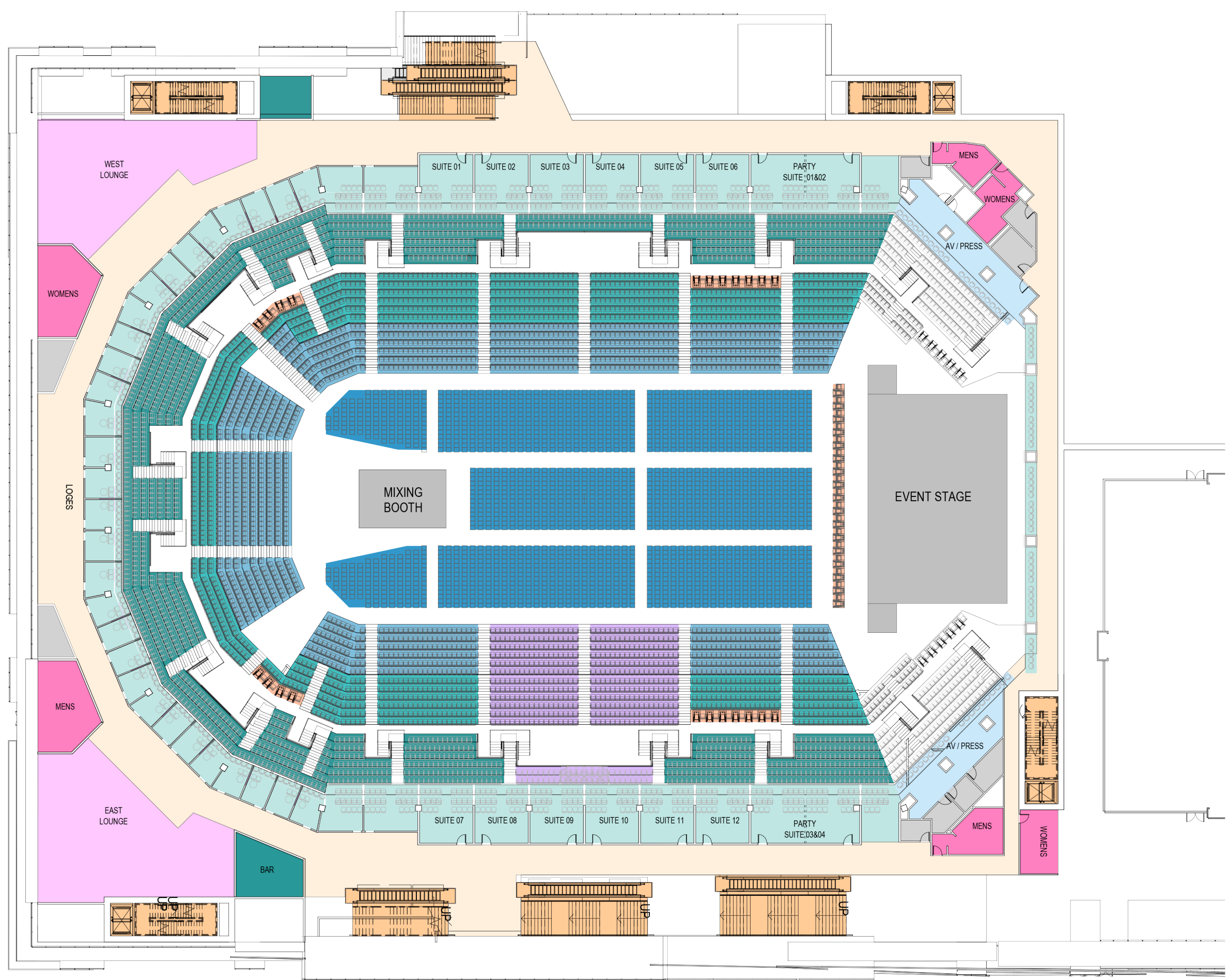


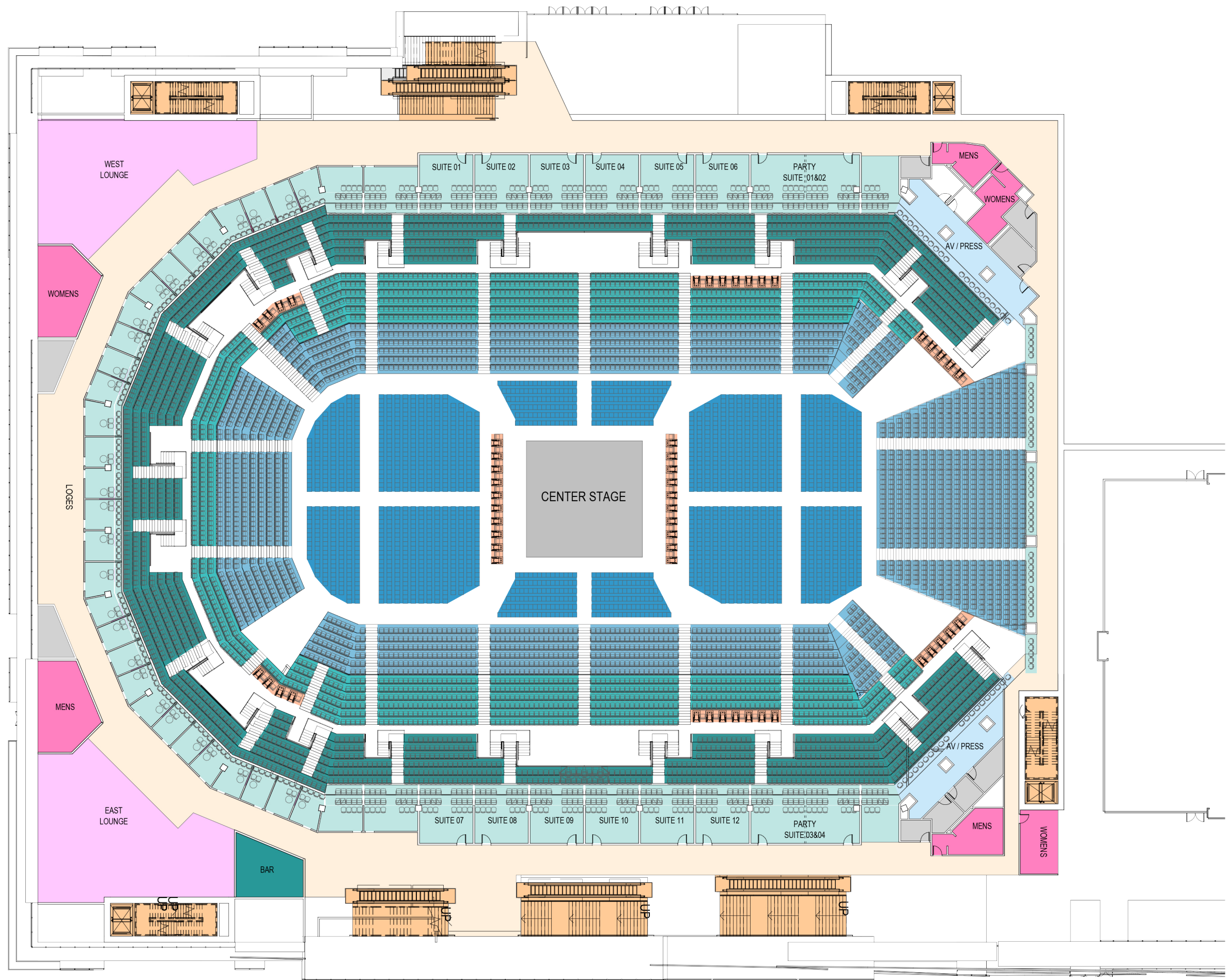


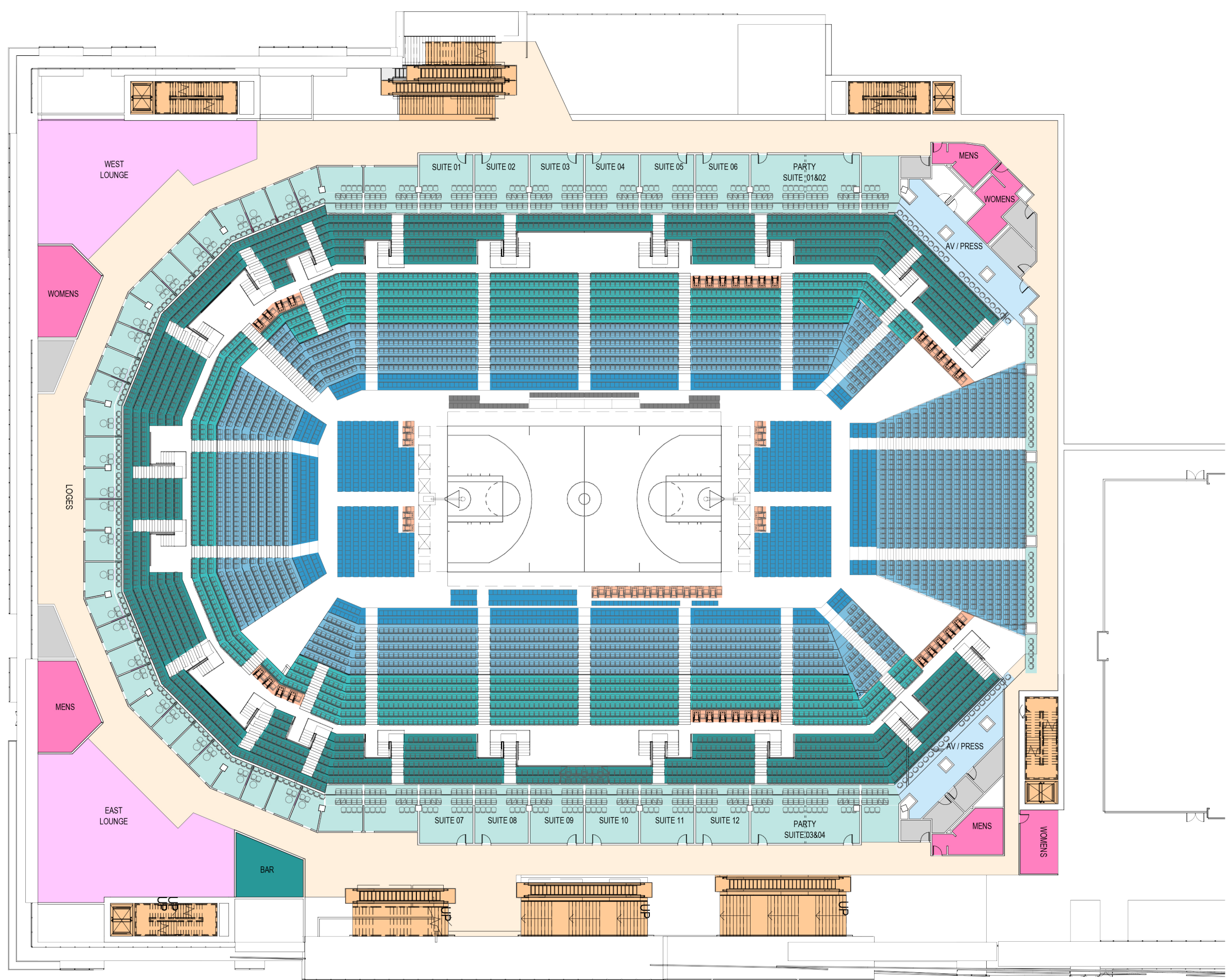


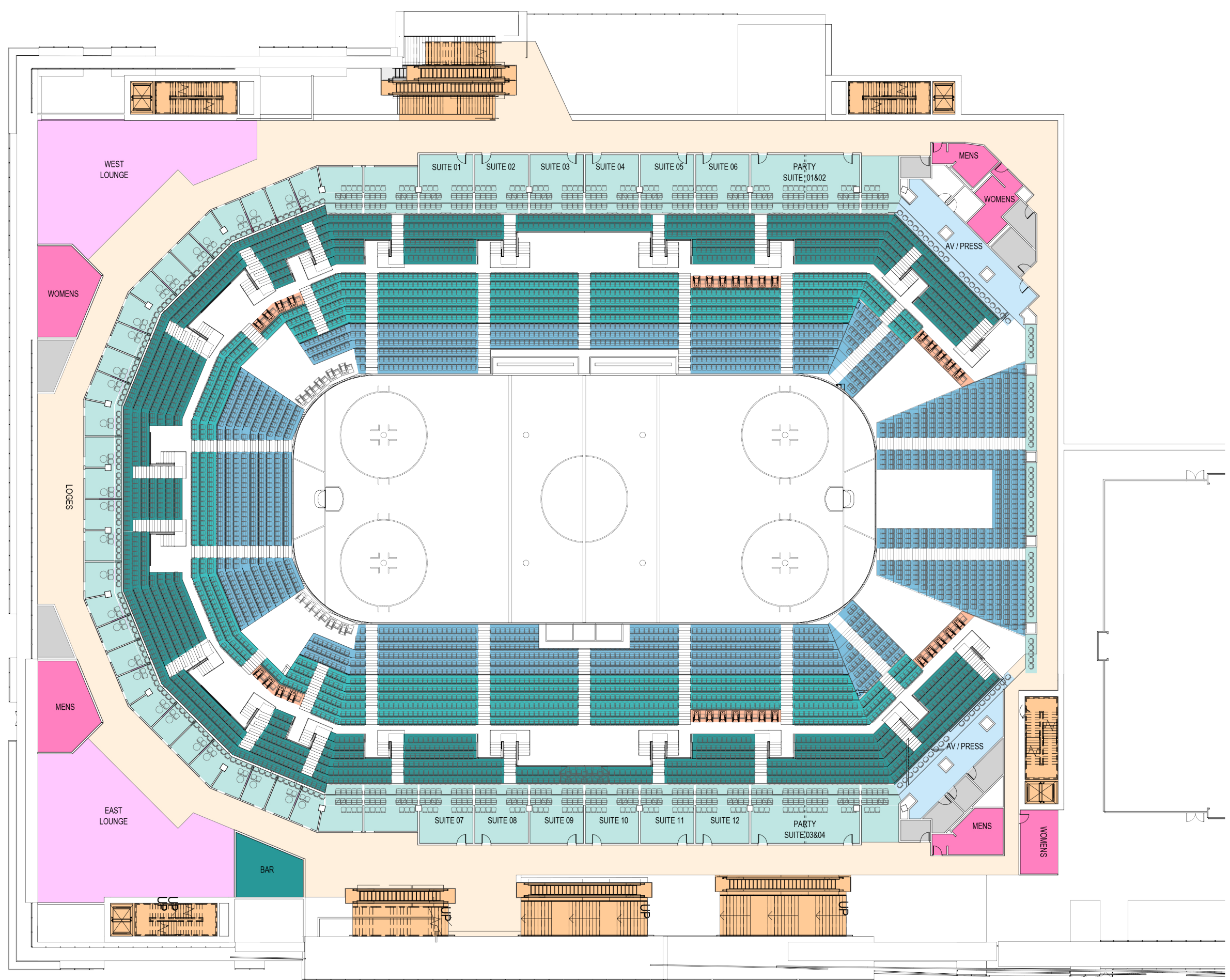


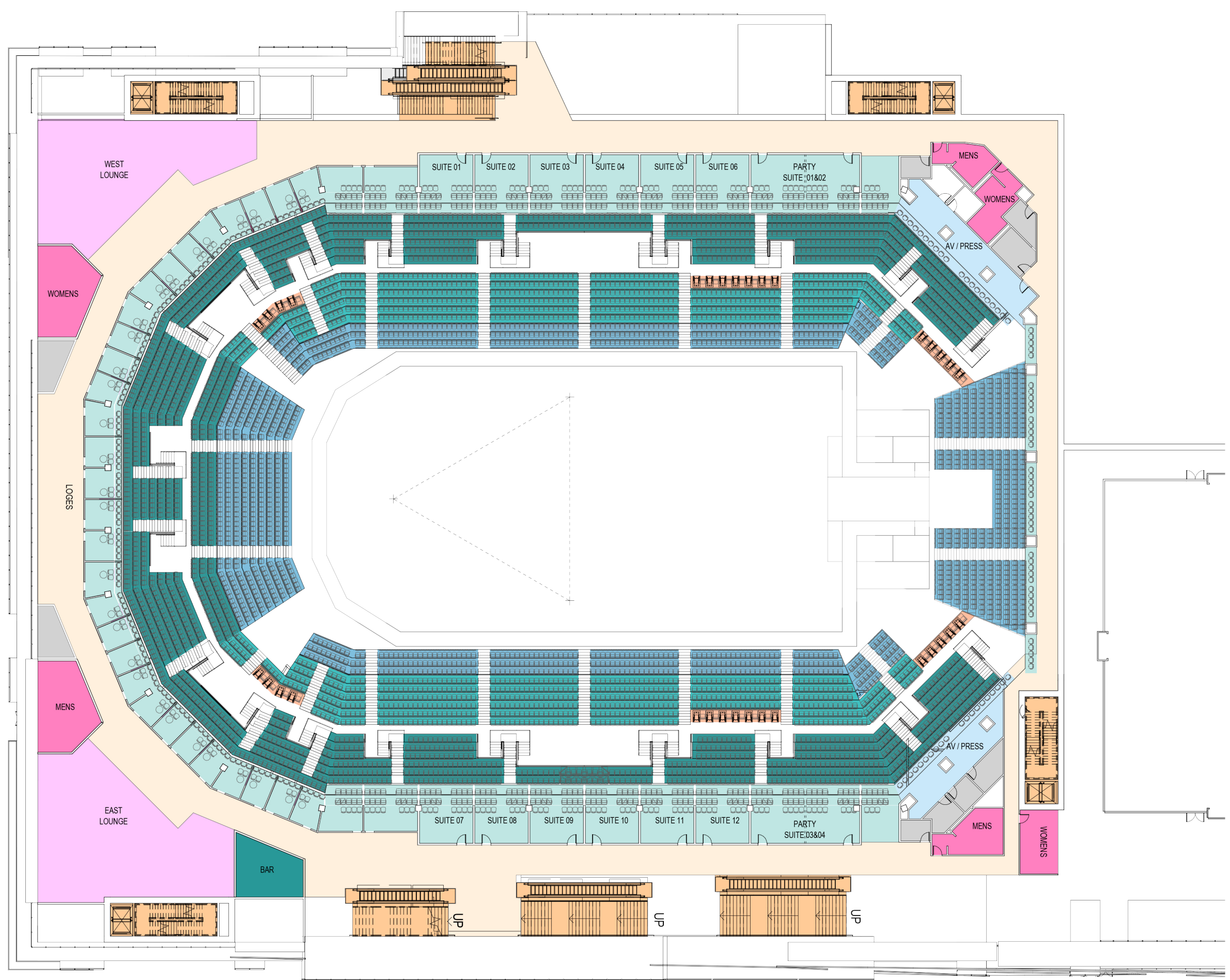
EVENT FLOOR PLANS

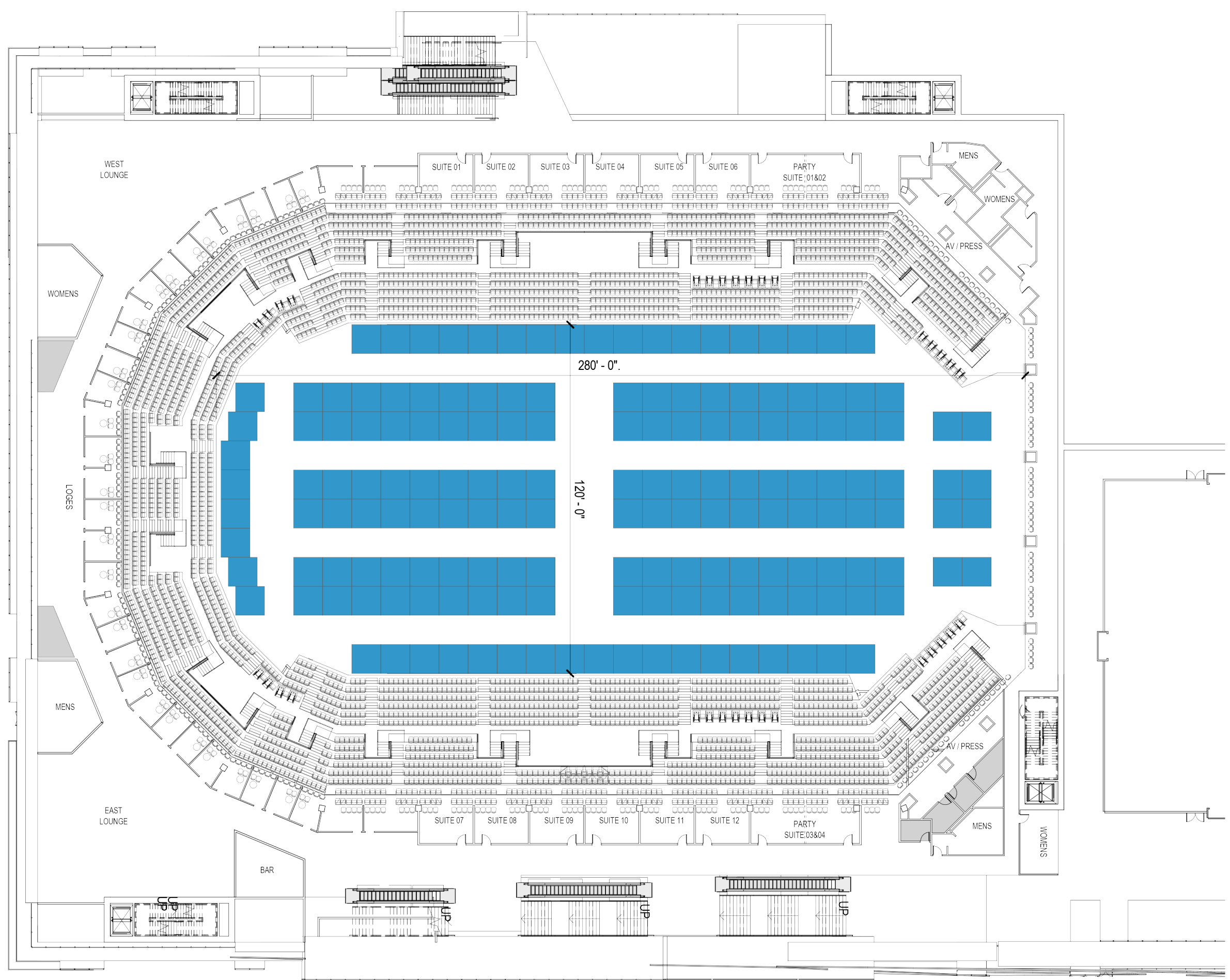




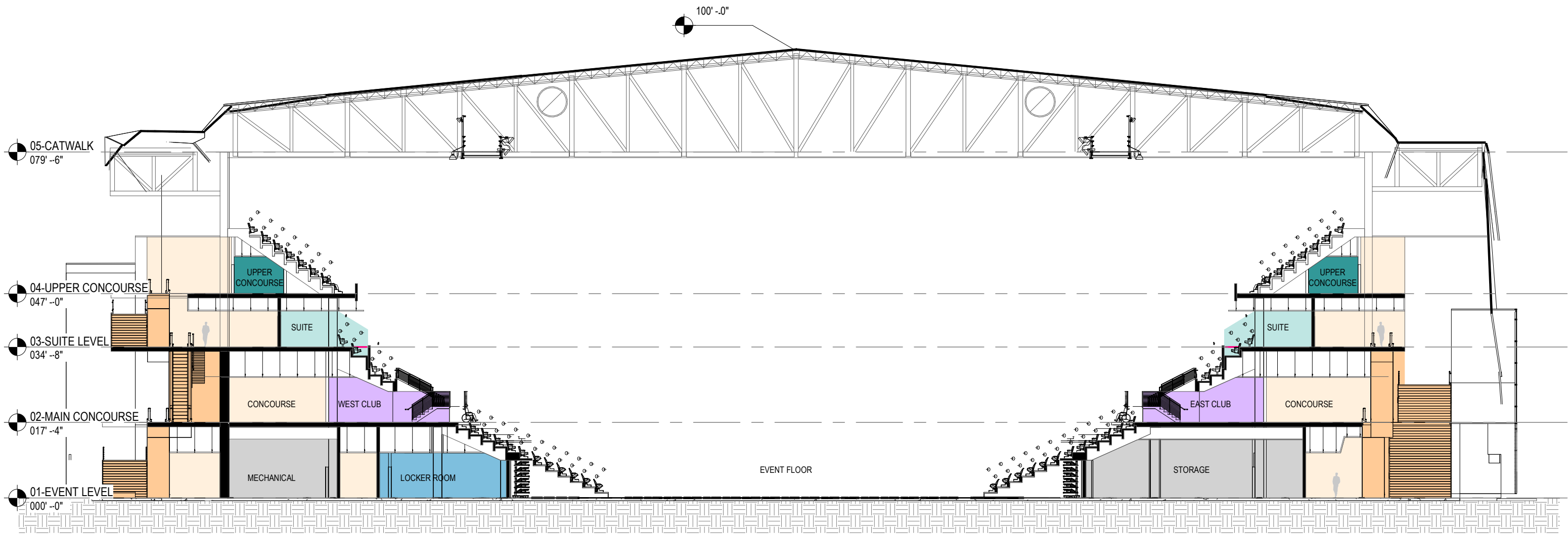








SECTIONS RENDERINGS









CONCEPT DESIGN - SEPTEMBER 2020

JAMES BROWN ARENA

7TH STREET BIRD'S EYE VIEW
LOOKING DOWNTOWN

Perkins&Will

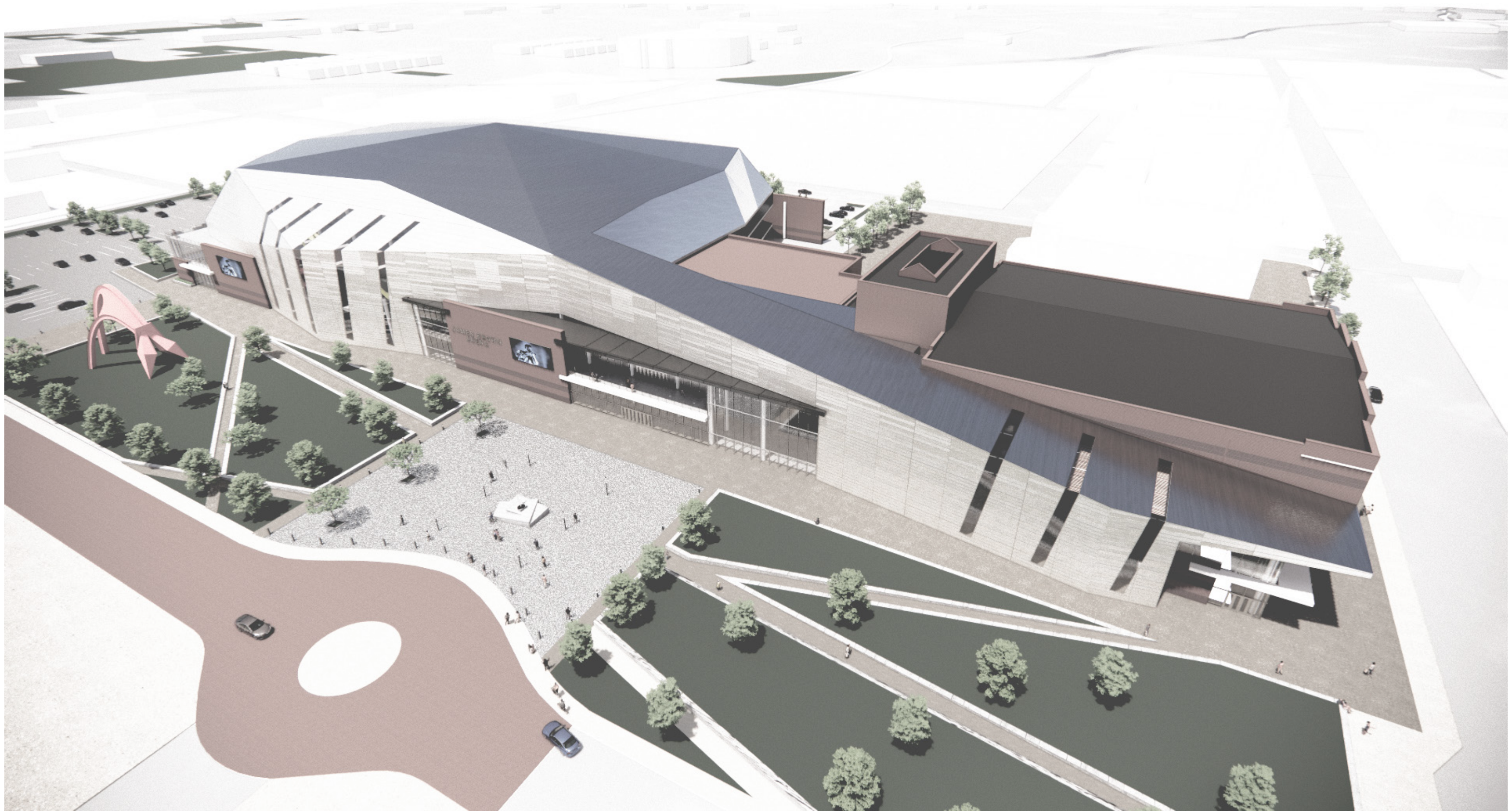












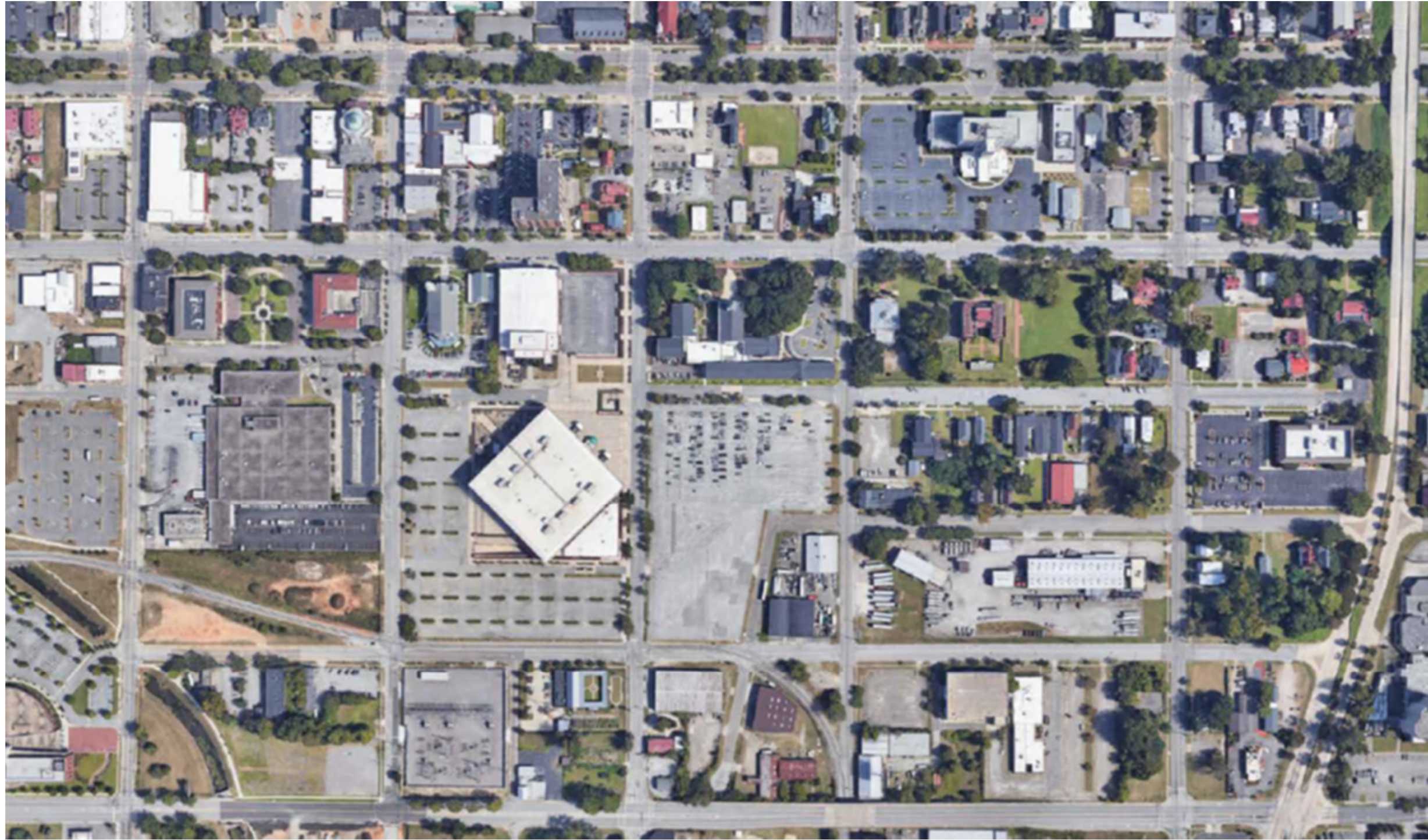
JAMES BROWN ARENA



Project Feasibility and Implementation Plan
Prepared for: Augusta-Richmond County Coliseum Authority
James Brown Arena
September 17, 2020



PROJECT OVERVIEW



PROGRAMMING

ARENA

SITE SIZE	11 acres
ARENA SIZE	300,000+ gsf
END-STAGE CAPACITY	10,000 seats (minimum)
CENTER STAGE CAPACITY	11,000 seats
LOWER BOWL CAPACITY	6,500 seats
PREMIUM SEATS	1,100 lounge, club and premium seating options
SUITES	12 suites with 16-18 seats per (192 – 216 total)

MEETING ROOMS / BALLROOM

BALLROOM	18,500 sf
MEETING ROOMS (# AND SF)	4 to 6 / 1,200 sf
BOARDROOM	500 sf
ADMINISTRATIVE OFFICES	2,000 sf

CONNECTION TO BELL AUDITORIUM AND OUTDOOR EVENT PLAZA SPACE

COST SUMMARY

COST SUMMARY

BUILDINGS CONSTRUCTION (Includes Demo, New Arena and Connector, Bell Auditorium Expansion / Improvements)	\$170,471,728
SITE WORK (Includes Site Utilities, Central Utility Plant Plaza, New Arena Site Parking, Existing Parking Lot Improvements, Public Art Program)	\$15,250,000
BUILDINGS AND SITE WORK CONSTRUCTION SUBTOTAL	\$185,721,728
SOFT COSTS	\$30,000,000
PROJECT COST TOTAL	\$215,721,728
TOTAL PROJECT AND CONSTRUCTION COST ESCALATED TO 2022	\$228,000,000
OPTIONAL ADD ALTERNATES	
BALL ROOM - ALTERNATE #1	\$16,731,940
ARENA FLOOR COOLING (ICE) SYSTEM – ALTERNATE #2	\$4,000,000
PARKING DECK - ALTERNATE #3	\$18,500,000

PROJECT ALTERNATES

Alternate #1 - Ball Room

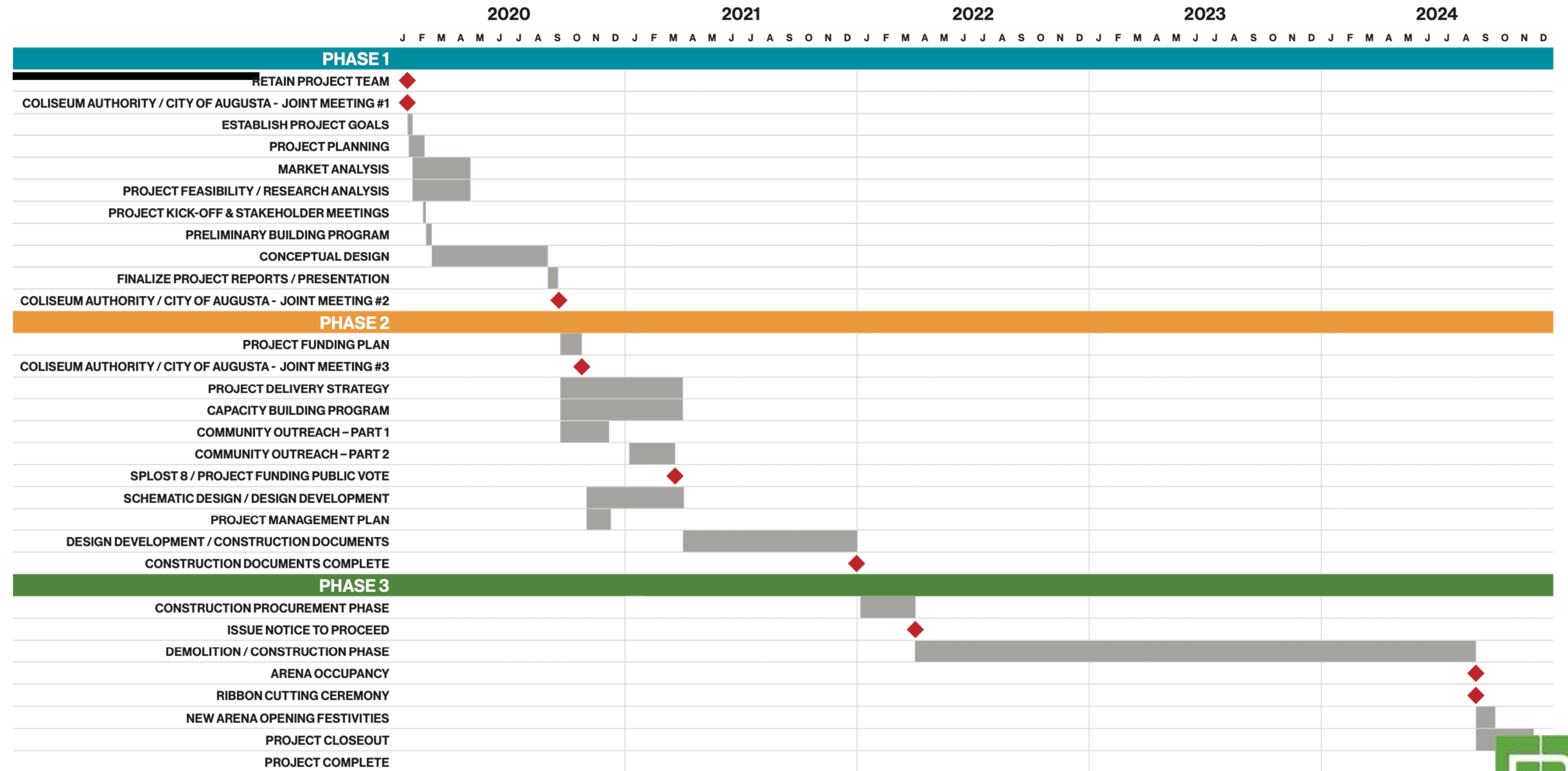
\$16,731,940

Alternate #2 - Arena Floor Cooling (Ice) System

\$4,000,000

Alternate #3 – Parking Deck

\$18,500,000



SCHEDULE

PHASE 1	
RETAIN PROJECT TEAM	1/21/20
COLISEUM AUTHORITY / CITY OF AUGUSTA - JOINT MEETING #1	1/21/20
ESTABLISH PROJECT GOALS	1/21/20 - 1/31/20
PROJECT PLANNING	1/21/20 - 2/18/20
MARKET ANALYSIS	1/31/20 - 8/31/20
PROJECT FEASIBILITY / RESEARCH ANALYSIS	1/31/20 - 8/31/20
PROJECT KICK-OFF & STAKEHOLDER MEETINGS	2/17/20 - 2/18/20
PRELIMINARY BUILDING PROGRAM	2/18/20 - 2/28/20
CONCEPTUAL DESIGN	3/1/20 - 8/31/20
FINALIZE PROJECT REPORTS / PRESENTATION	9/1/20 - 9/16/20
COLISEUM AUTHORITY / CITY OF AUGUSTA - JOINT MEETING #2	9/17/20
PHASE 2	
PROJECT FUNDING PLAN	9/18/20 - 10/20/20
COLISEUM AUTHORITY / CITY OF AUGUSTA - JOINT MEETING #3	10/20/20
PROJECT DELIVERY STRATEGY	9/18/20 - 3/31/21
CAPACITY BUILDING PROGRAM	9/18/20 - 3/31/21
COMMUNITY OUTREACH – PART 1	9/18/20 - 12/8/20
COMMUNITY OUTREACH – PART 2	1/4/21 - 3/16/21
SPLOST 8 / PROJECT FUNDING PUBLIC VOTE	3/16/21
SCHEMATIC DESIGN / DESIGN DEVELOPMENT	11/1/20 - 3/31/21
PROJECT MANAGEMENT PLAN	11/1/20 - 12/8/20
DESIGN DEVELOPMENT / CONSTRUCTION DOCUMENTS	4/1/21 - 12/31/21
CONSTRUCTION DOCUMENTS COMPLETE	12/31/21
PHASE 3	
CONSTRUCTION PROCUREMENT PHASE	1/3/22 - 3/31/22
ISSUE NOTICE TO PROCEED	4/1/22
DEMOLITION / CONSTRUCTION PHASE	4/1/22 - 8/31/24
ARENA OCCUPANCY	8/31/24
RIBBON CUTTING CEREMONY	9/1/24
NEW ARENA OPENING FESTIVITIES	9/1/24 - 9/30/24
PROJECT CLOSEOUT	9/1/24 - 11/30/24
PROJECT COMPLETE	11/30/24

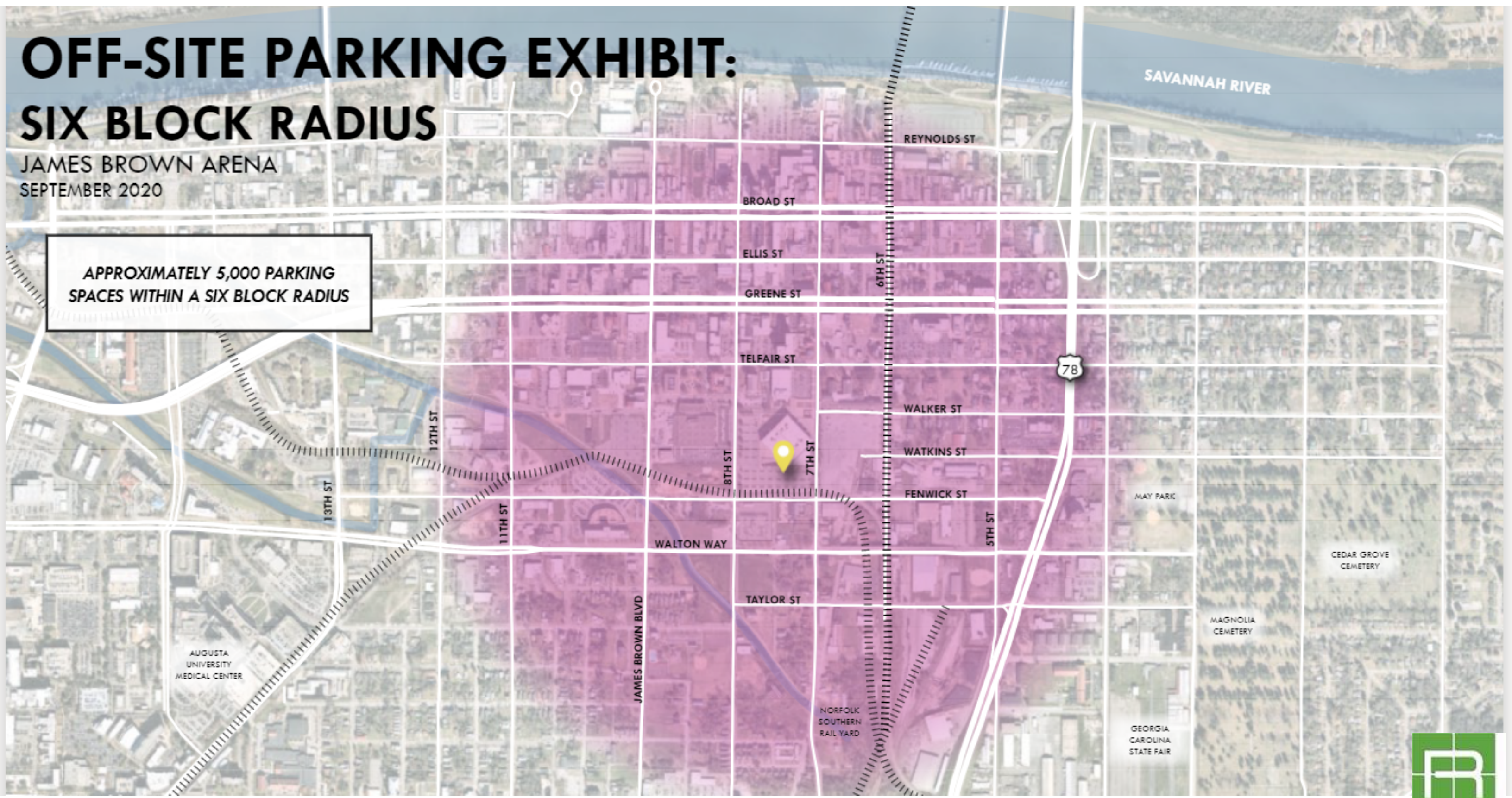
TRAFFIC AND PARKING STUDY

- Evaluated the ingress / egress of vehicular traffic to the site,
- Defined the key components of a transportation plan for special events,
- Developed a parking management plan,
- Assessed on-site versus off-site, surface versus parking deck, parking demand versus parking available, and
- Determined the impact of rideshare on parking demand

OFF-SITE PARKING EXHIBIT: SIX BLOCK RADIUS

JAMES BROWN ARENA
SEPTEMBER 2020

APPROXIMATELY 5,000 PARKING SPACES WITHIN A SIX BLOCK RADIUS



OFF-SITE PARKING EXHIBIT: OPTIMAL LOCATIONS

JAMES BROWN ARENA
SEPTEMBER 2020

APPROXIMATELY 3,500 OPTIMAL
PARKING SPACES AVAILABLE

- 1 LUTHERAN CHURCH PARKING DECK (100 SPACES)
- 2 CHURCH/RETAIL PARKING (90 SPACES)
- 3 THE RICHMOND ON GREENE (30 SPACES)
- 4 SHARED OFFICE (35 SPACES)
- 5 DEPARTMENT OF LABOR (75 SPACES)
- 6 SHARED OFFICE (170 SPACES)
- 7 DEFENDANT'S OFFICE (50 SPACES)
- 8 LIBRARY (30 SPACES)
- 9 METHODIST CHURCH (165 SPACES)
- 10 CITY HALL (195 SPACES)
- 11 CITY SERVICES (35 SPACES)
- 12 JUDICIAL CENTER (264 SPACES)
- 13 POST OFFICE (85 SPACES)
- 14 TRINITY CATHOLIC CHURCH (40 SPACES)
- 15 PROBATE COURT (335 SPACES)
- 16 VACANT LOT (85 SPACES)
- 17 HUMAN RESOURCES DEPARTMENT (210 SPACES)
- 18 RE-PURPOSED DIRT LOT (194 SPACES)
- 19 RE-PURPOSED LOT (125 SPACES)
- APPROXIMATE SITE BOUNDARY
- *ON-STREET (850 SPACES)
- *ON-SITE (1,100 SPACES)

PHASE 2 MAJOR INITIATIVES

- Capacity Building Program
- Community Outreach
- Public Arts Program

NEXT STEPS

- \$25M in SPLOST 8 Program
- Sustainable Funding Plan
- Address the Gap Budget to provide interim funding
- Engage in community outreach efforts
- Identify scope of the public ROW improvements to support JBA

