

DuPage County Sportsplex Feasibility Study – Update DuPage County, IL

March 2024

Agenda

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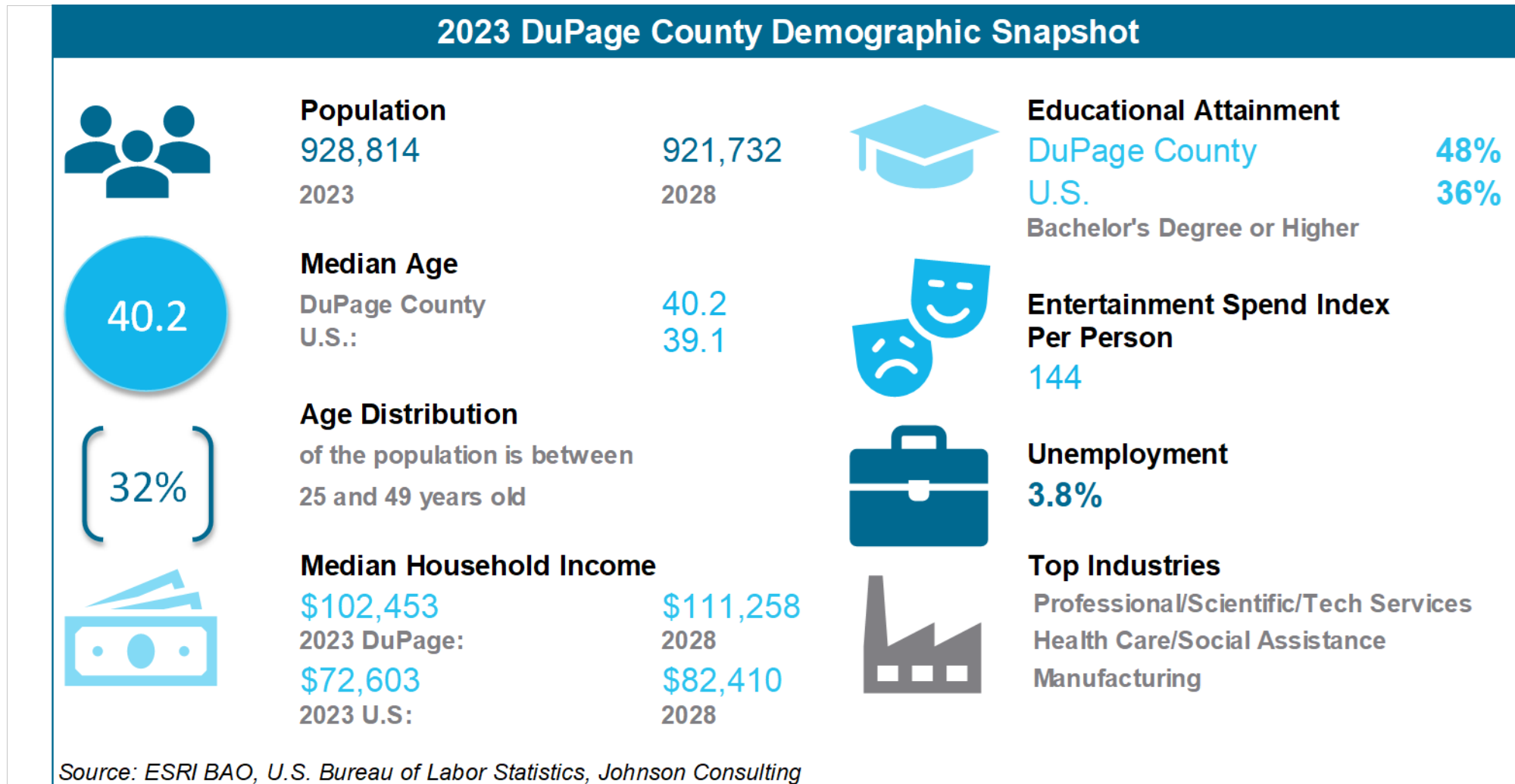
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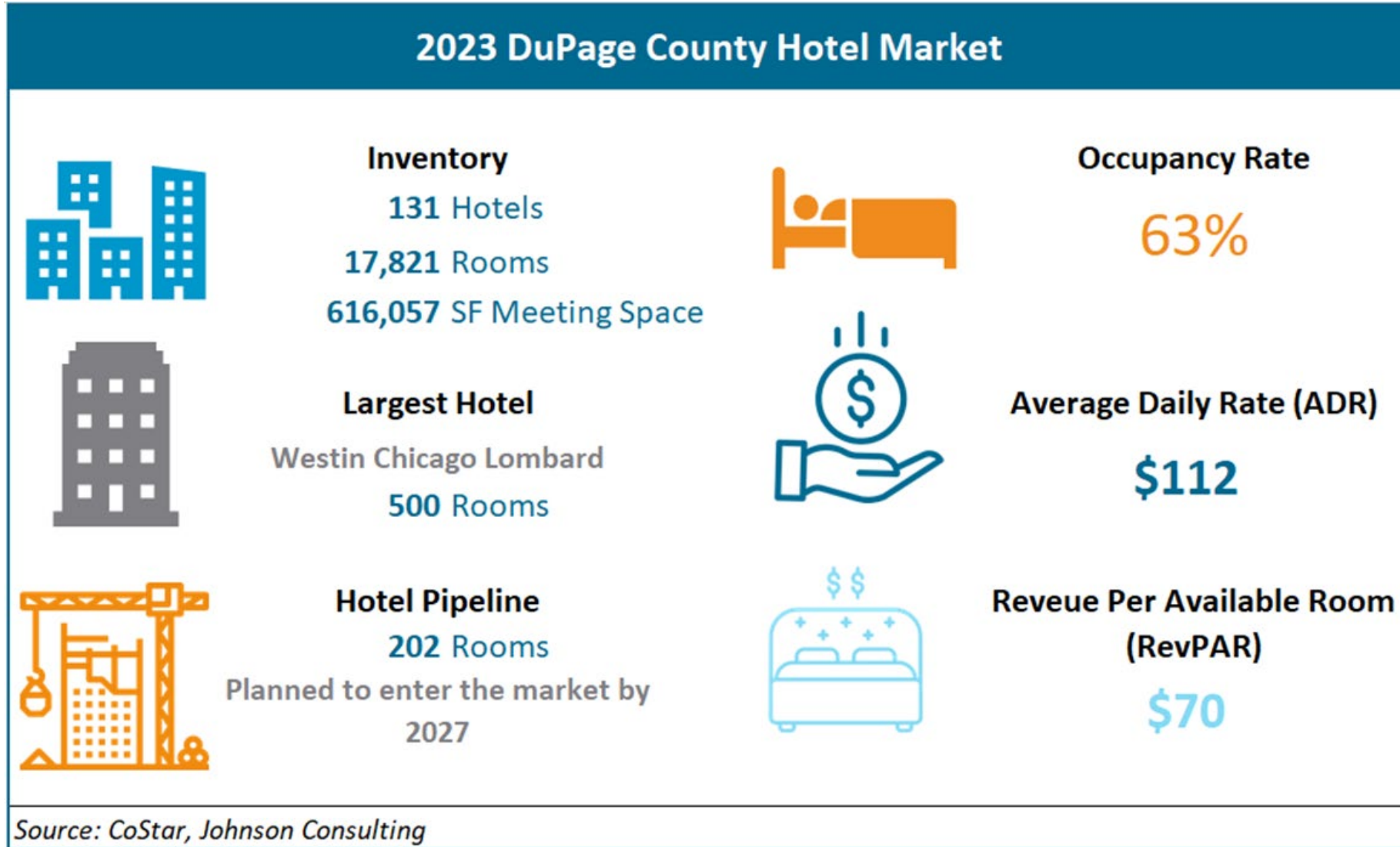
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National Case Studies

A blue-tinted photograph of a park with people walking and pushing strollers. The scene is a wide, open green space with several paved paths. In the foreground, a woman is pushing a stroller with a child. Other people are scattered throughout the park, some walking and some sitting on the grass. The background is filled with lush green trees under a bright sky with some clouds. The overall atmosphere is peaceful and active.

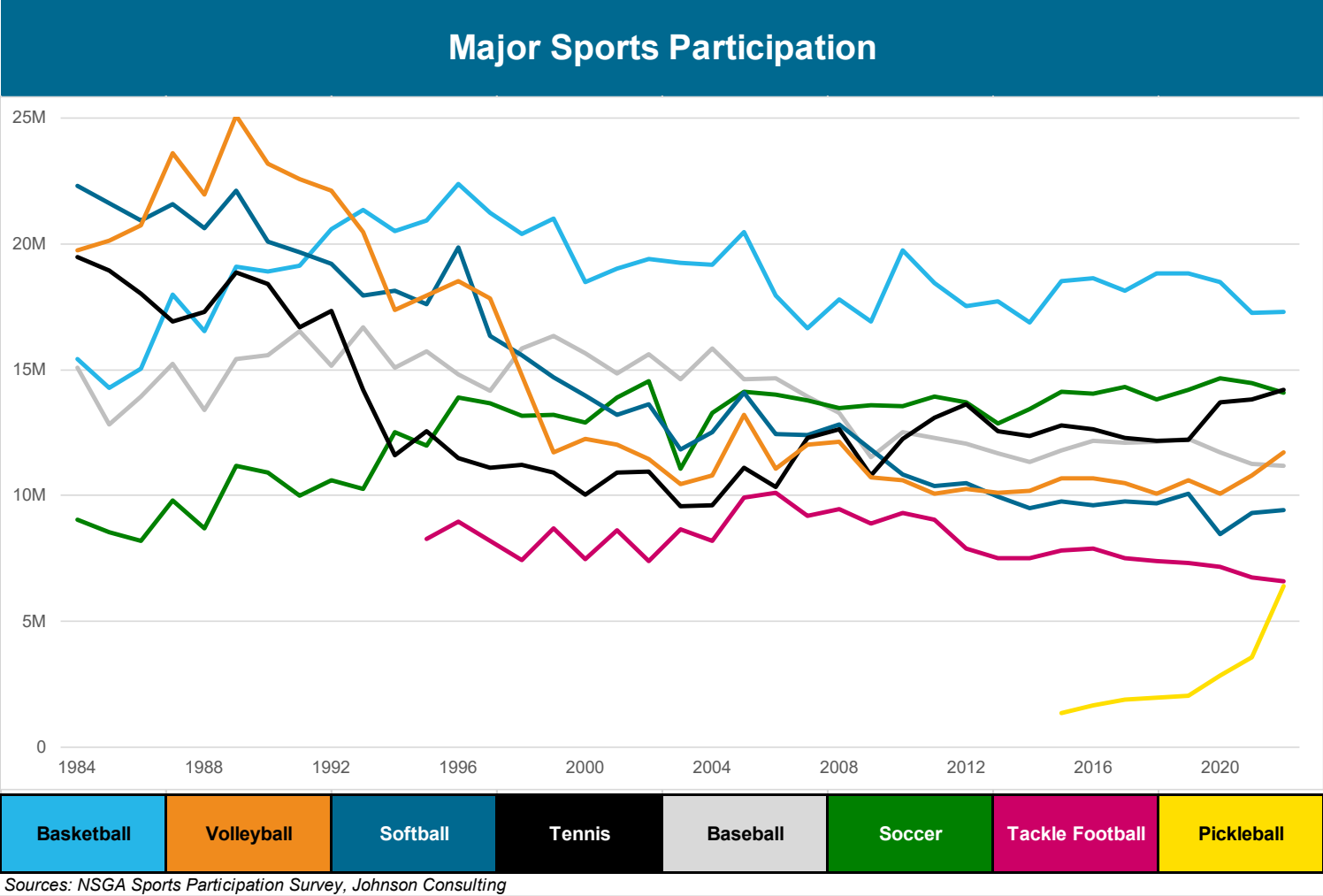
1. Demographic Snapshot & National Trends in Sports Participation





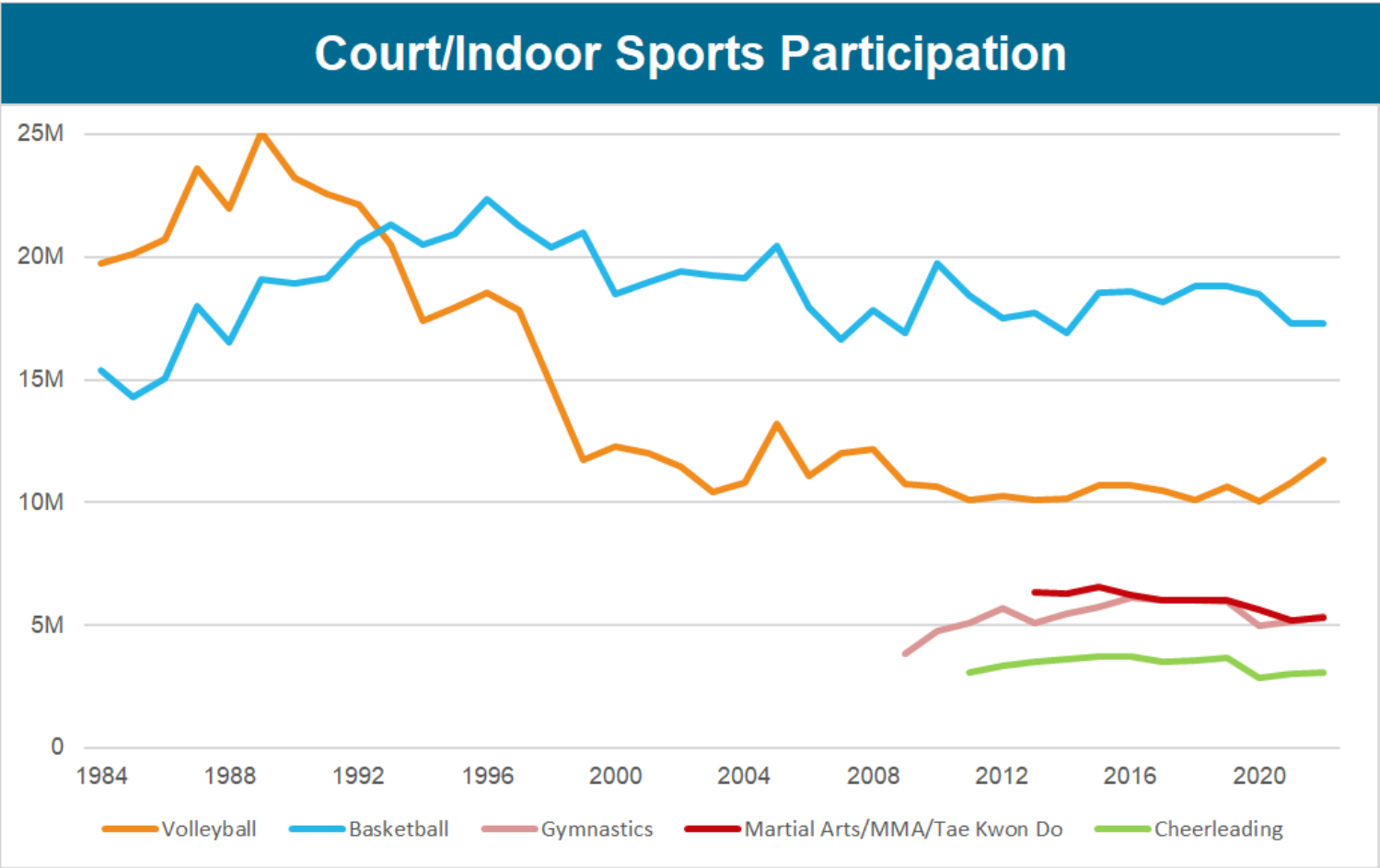
Major Sports Trends Participation

- The graph to the right shows trends in participation for major sports through the years.
- Youth Sports specialization has caused dramatic declines in major sports participation.
- Pickleball is seeing a rapid increase in participation in recent years.



Indoor Sports Trends Participation

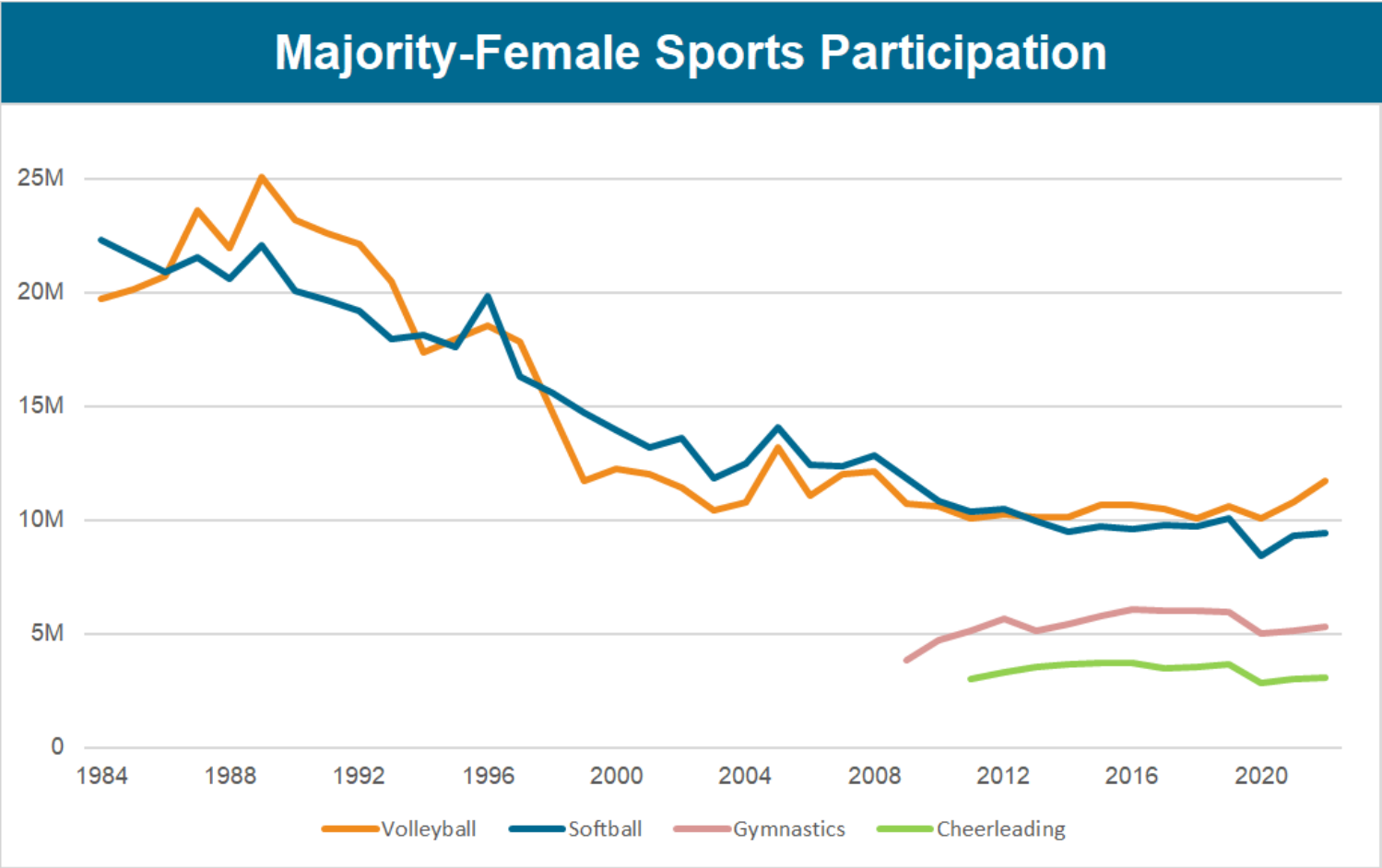
- The graph to the right shows trends in participation for major indoor sports through the years.
- While Volleyball has declined in total participation, core participation is strong.
- Despite declining since its peak in the mid-90's, basketball remains one of the most popular sports in the nation.



Sources: NSGA Sports Participation Survey, Johnson Consulting

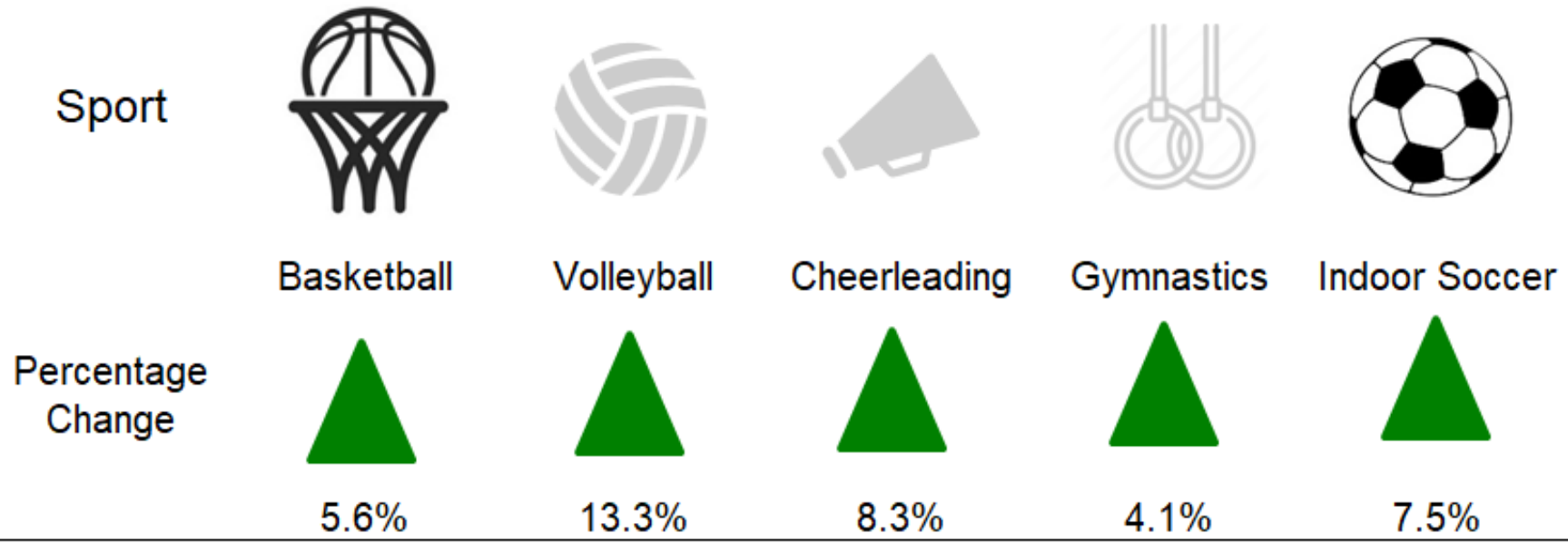
Female Sports Trends Participation

- The graph to the right shows trends in participation for majority female sports through the years.
- Female sports tournaments bring in more spending to the host-city's economy than their counterpart male sports.



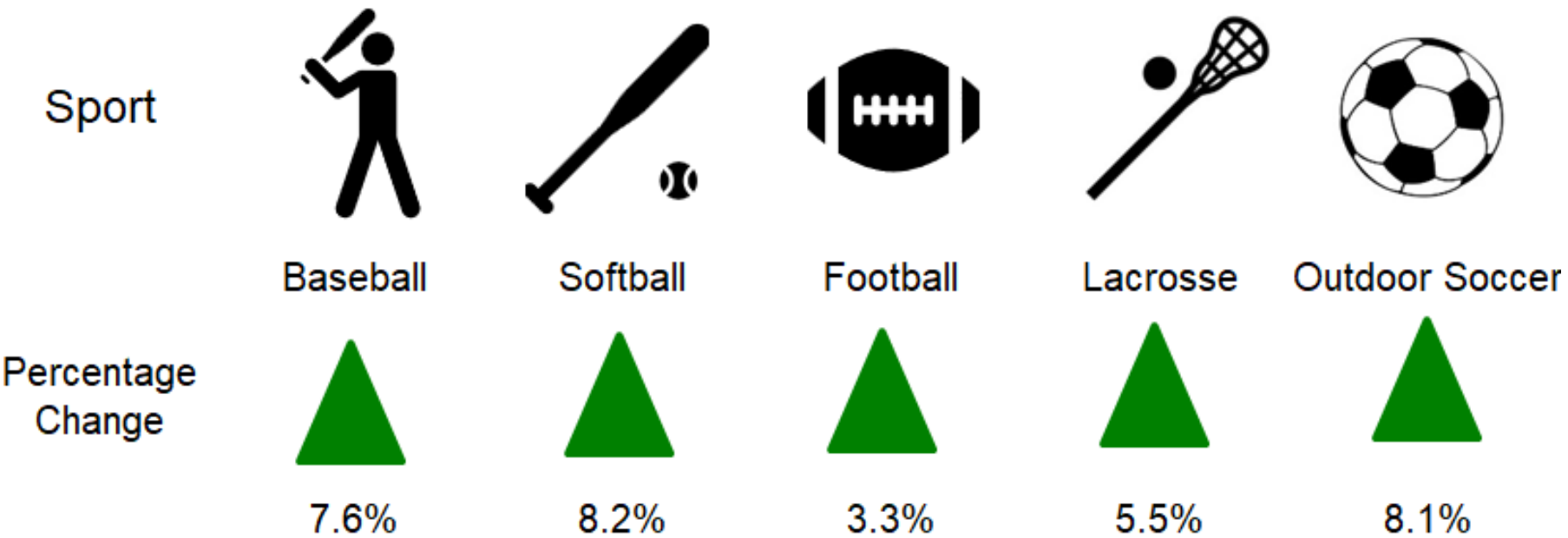
Sources: NSGA Sports Participation Survey, Johnson Consulting

Change in Indoor Sports Participation Trends (2022-2023)



Source: SFIA Sports Participation Survey, Johnson Consulting

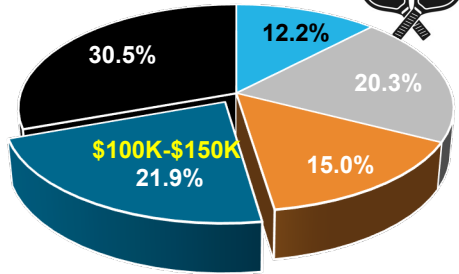
Change in Outdoor Sports Participation Trends (2022-2023)



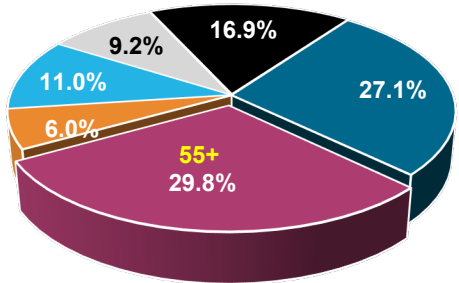
Source: SFIA Sports Participation Survey, Johnson Consulting

PICKLE BALL

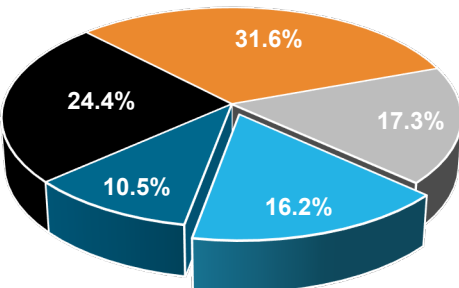
Income%



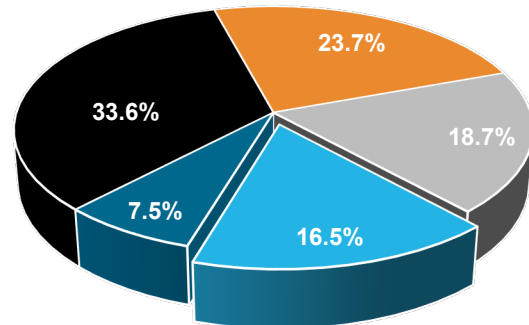
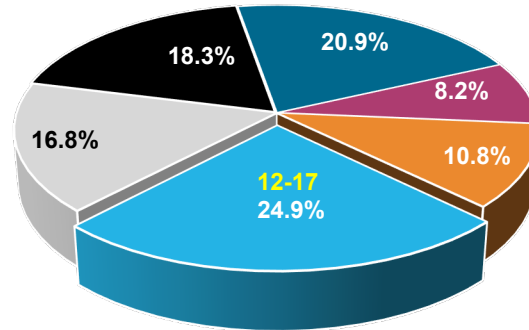
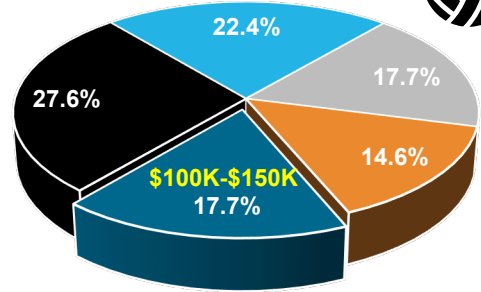
Age%



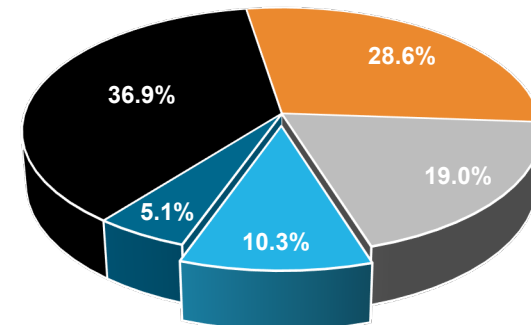
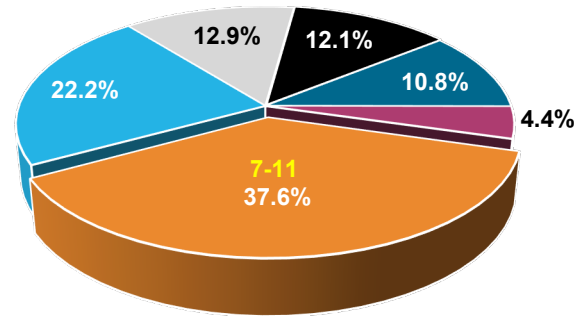
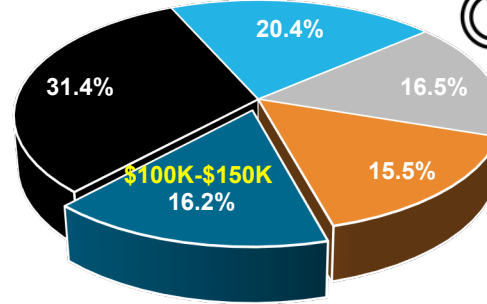
Regional%



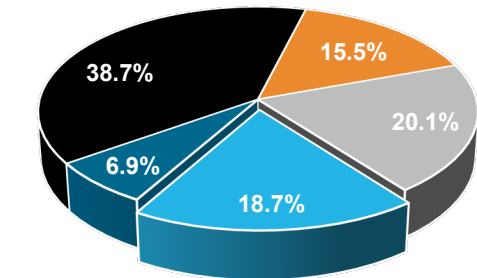
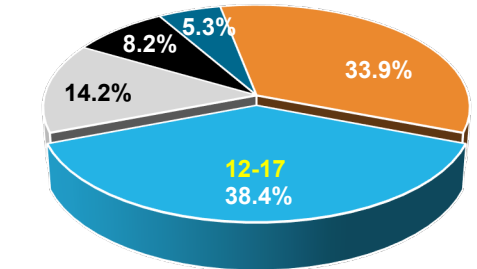
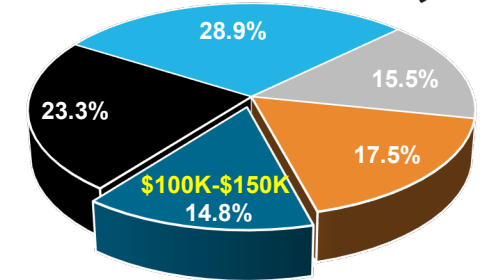
VOLLEY BALL



GYMNASTICS



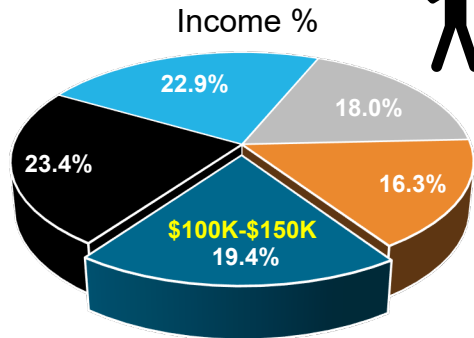
CHEERLEADING



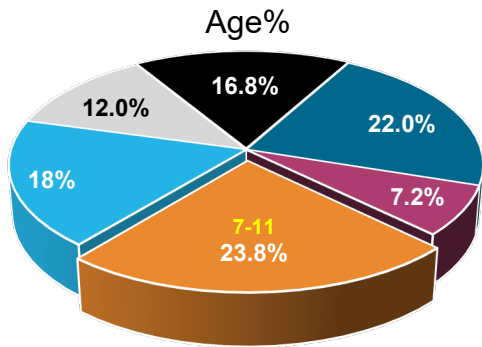
Baseball



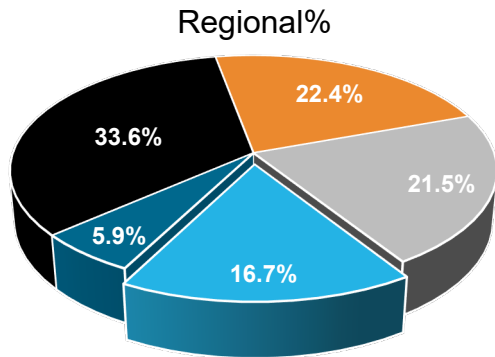
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\$50K-\$75K
\$75K-\$100K
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\$150,000 <



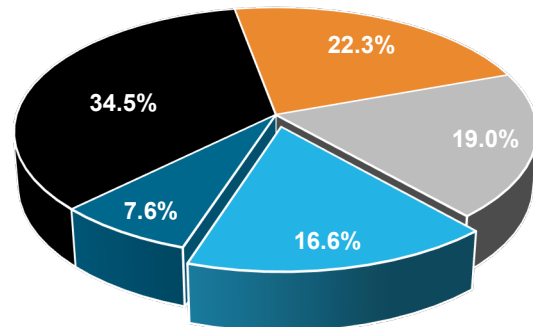
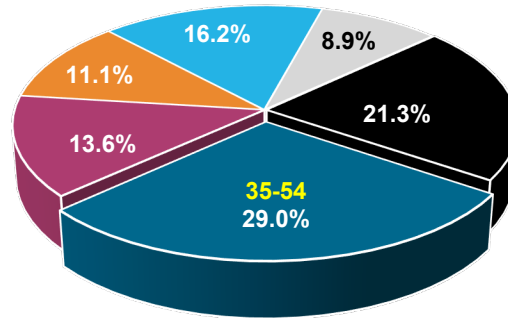
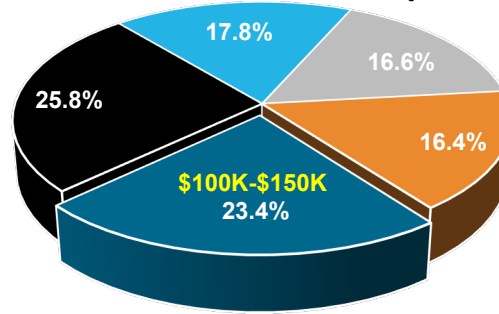
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12-17
18-24
25-34
35-54
55+



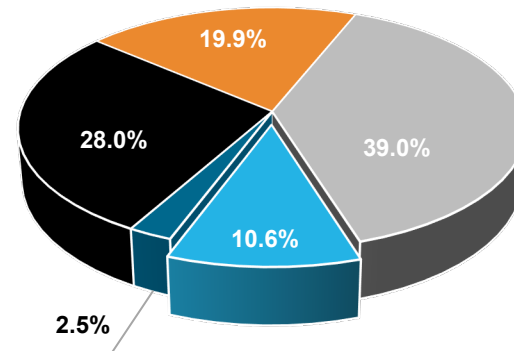
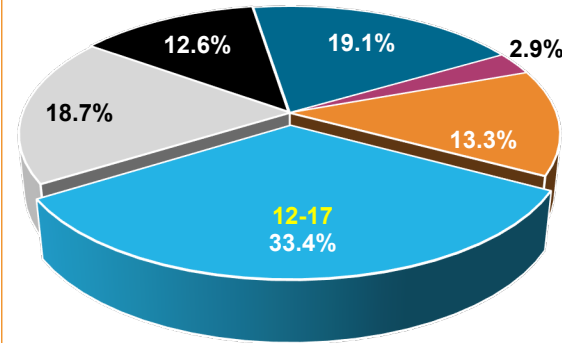
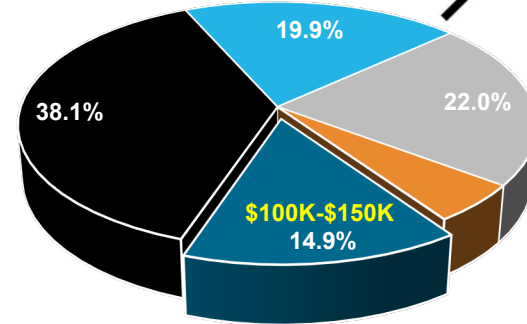
East Coast States
Great Lakes States
Great Plains States
Southern States
Western States



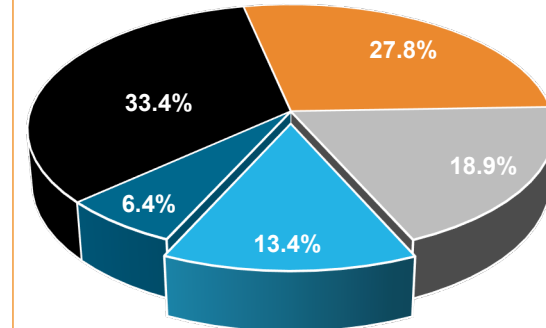
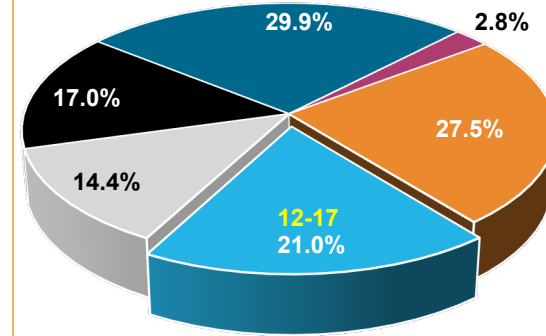
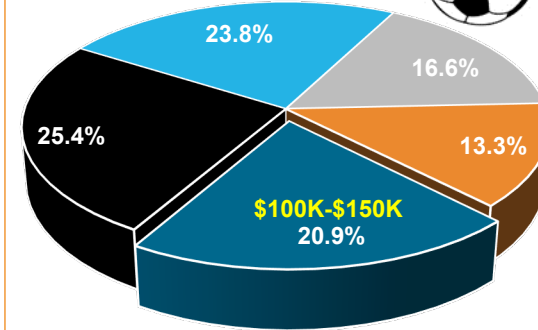
Softball



Lacrosse



Soccer

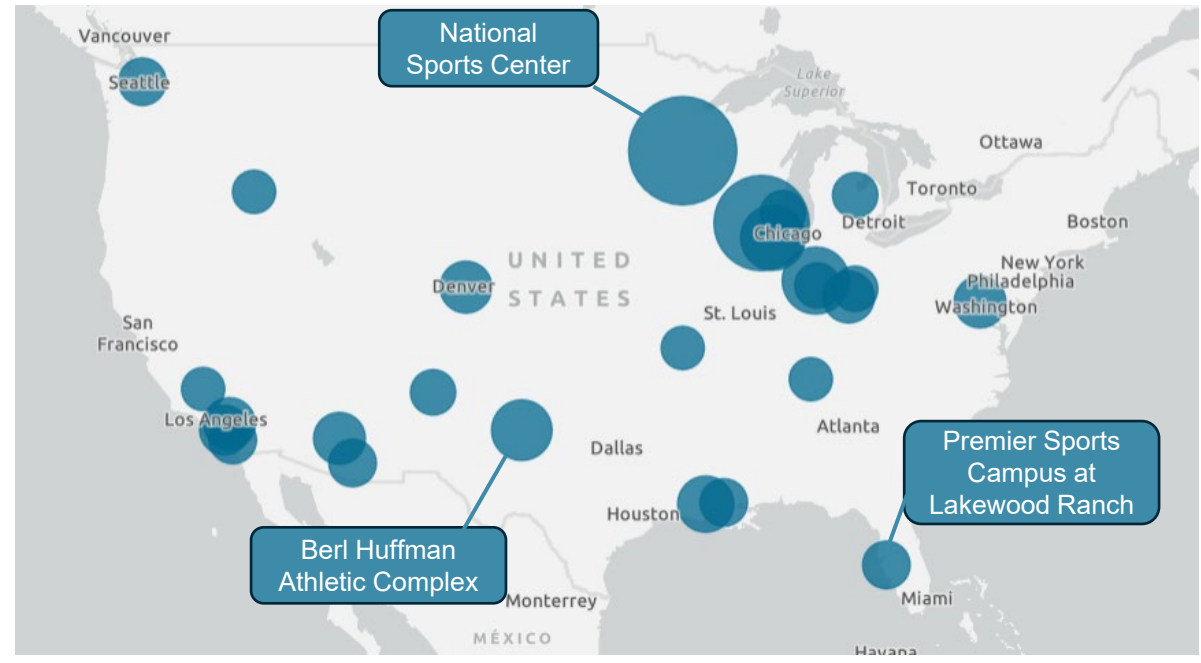
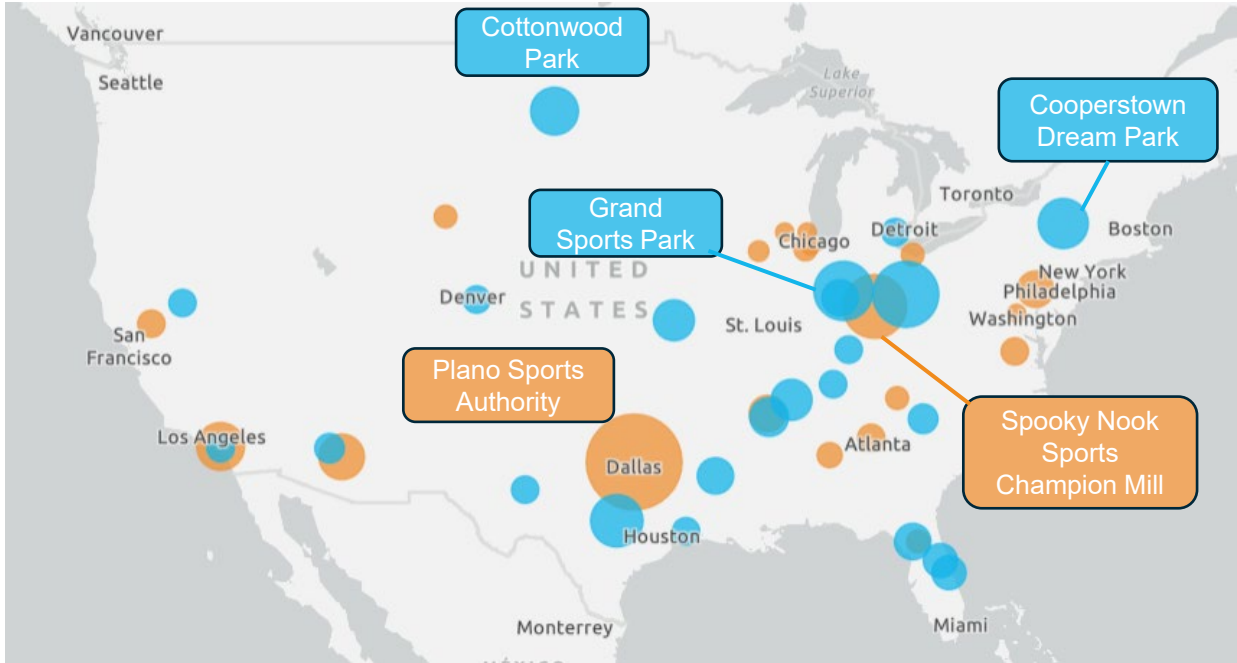


Surfaces vs. Facility Size

- A facility that aims to draw in regional and national events will want to maximize the numbers of courts.
- The diagram at right illustrates possible court orientations based on the scale of the facility.
- As shown, a 20,000 SF facility can fit 2 basketball courts while a 100,000 SF facility can fit 11 basketball courts.



Mega Sports Complexes

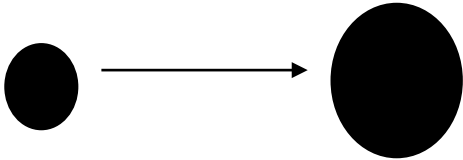


Qualifying Program
 12 + Diamonds
 8 + Indoor Courts
 20 + Outdoor Fields

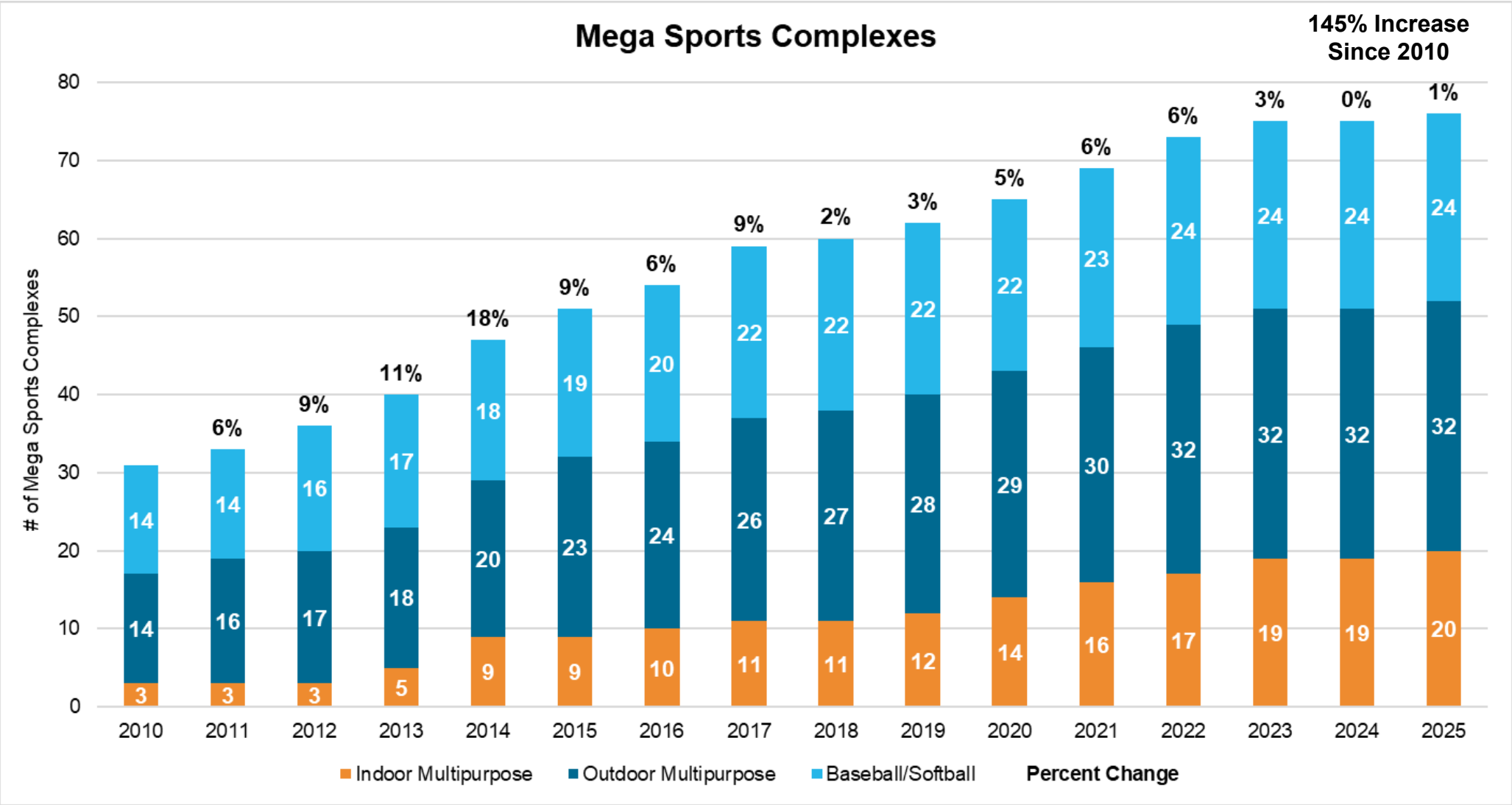
Type of Sports Complex

- Outdoor Multipurpose
- Baseball & Softball
- Indoor Multipurpose

Number of Surfaces



Mega Sports Complexes

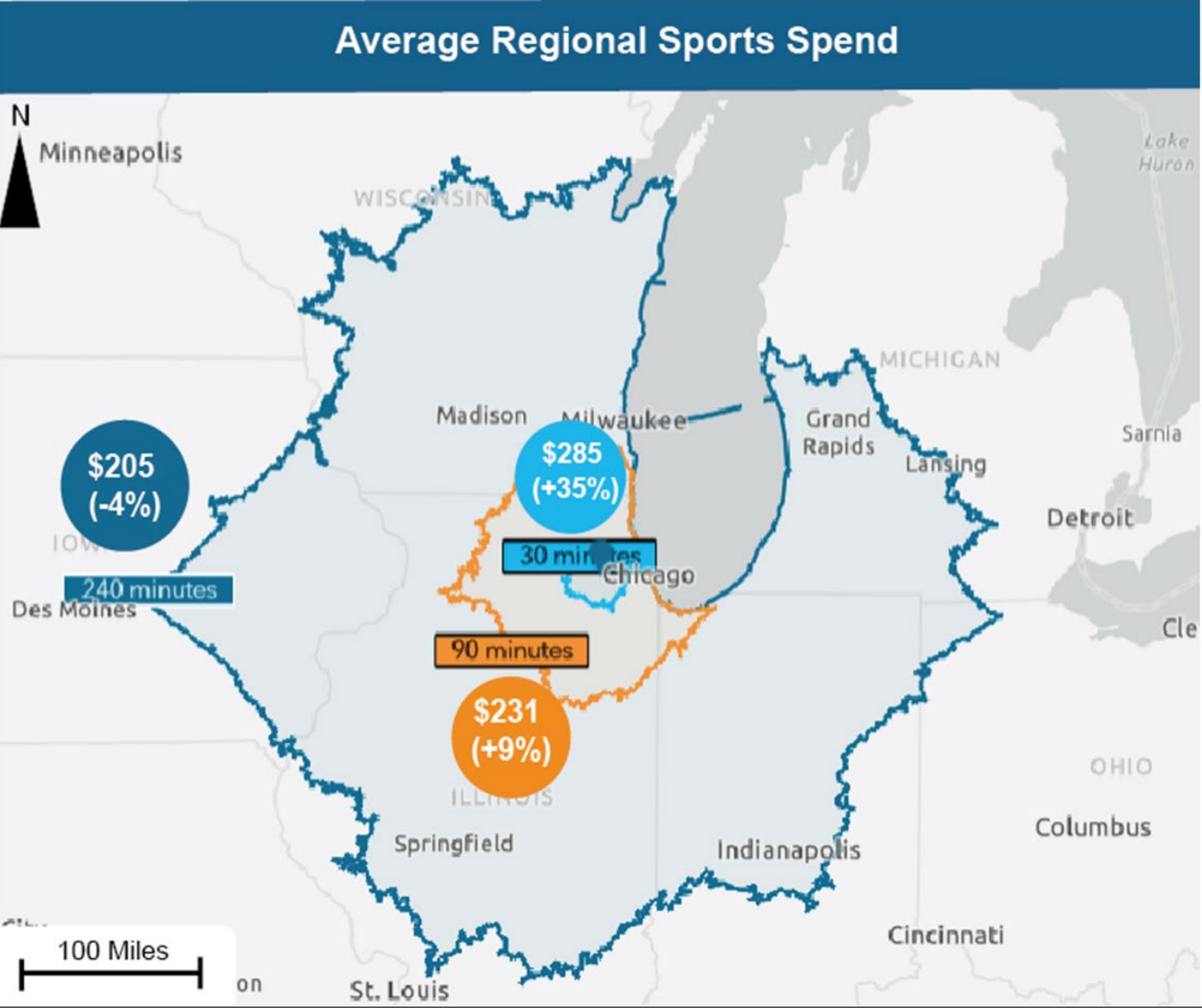


A photograph of a park with people walking on paths and a grassy area, overlaid with a blue gradient and white text. The scene is bright and sunny, with many trees and people enjoying the outdoors. The text is centered and reads "2. Regional Sports Spend & Facilities".

2. Regional Sports Spend & Facilities

DuPage Area and Regional Sports Spend

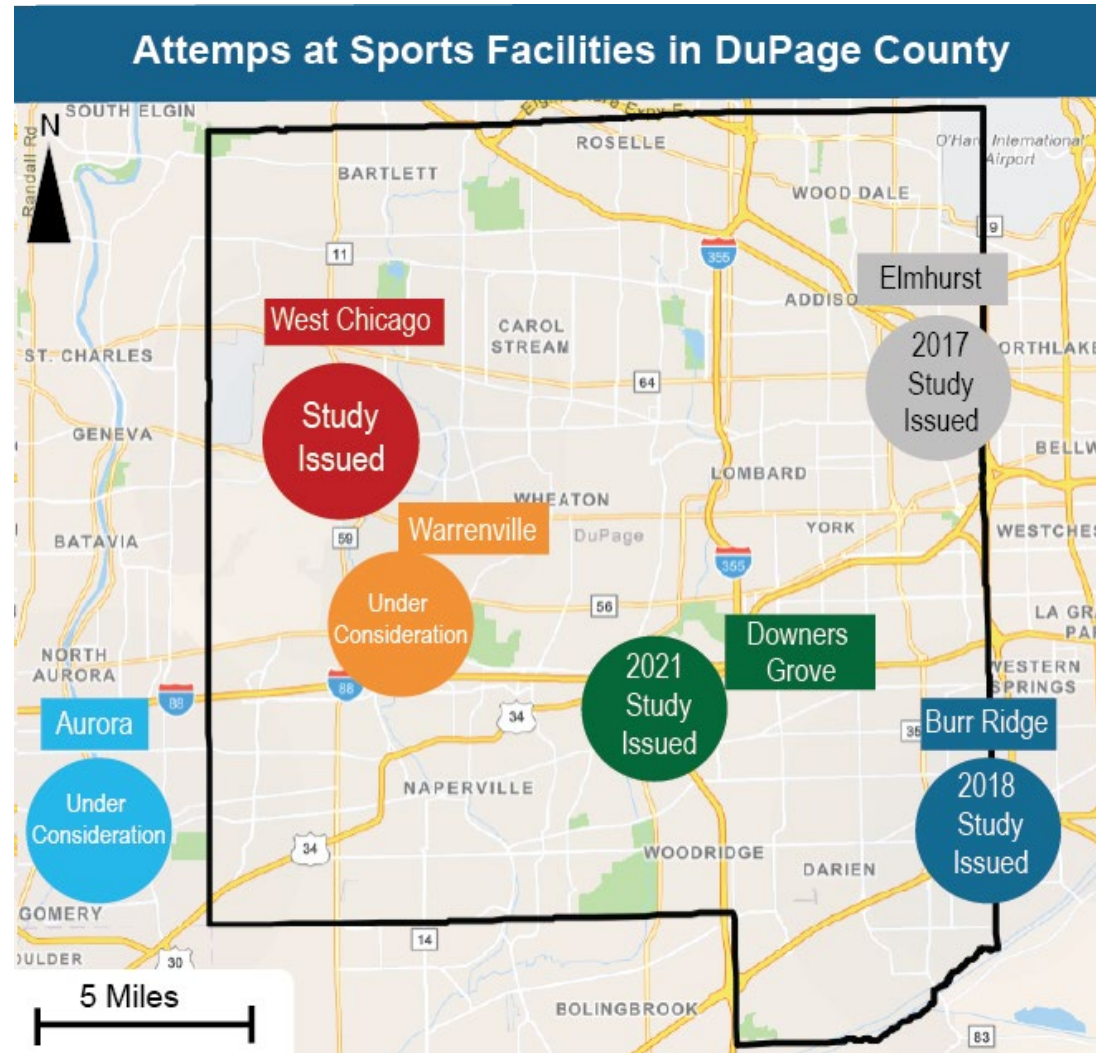
- Each number in the dots to the right represent an index of spending within that region, where 110 represents 10% higher than the national average and 95 representing 5% less than the national average.
- The 30-minute drivetime catchment spends significantly more than the national average on sporting events and fees for participation sports.



*Sports Spend is based on average of Fees for Participant Sports and Admission to Sports Events Excluding Trips
 Sources: Esri, Johnson Consulting

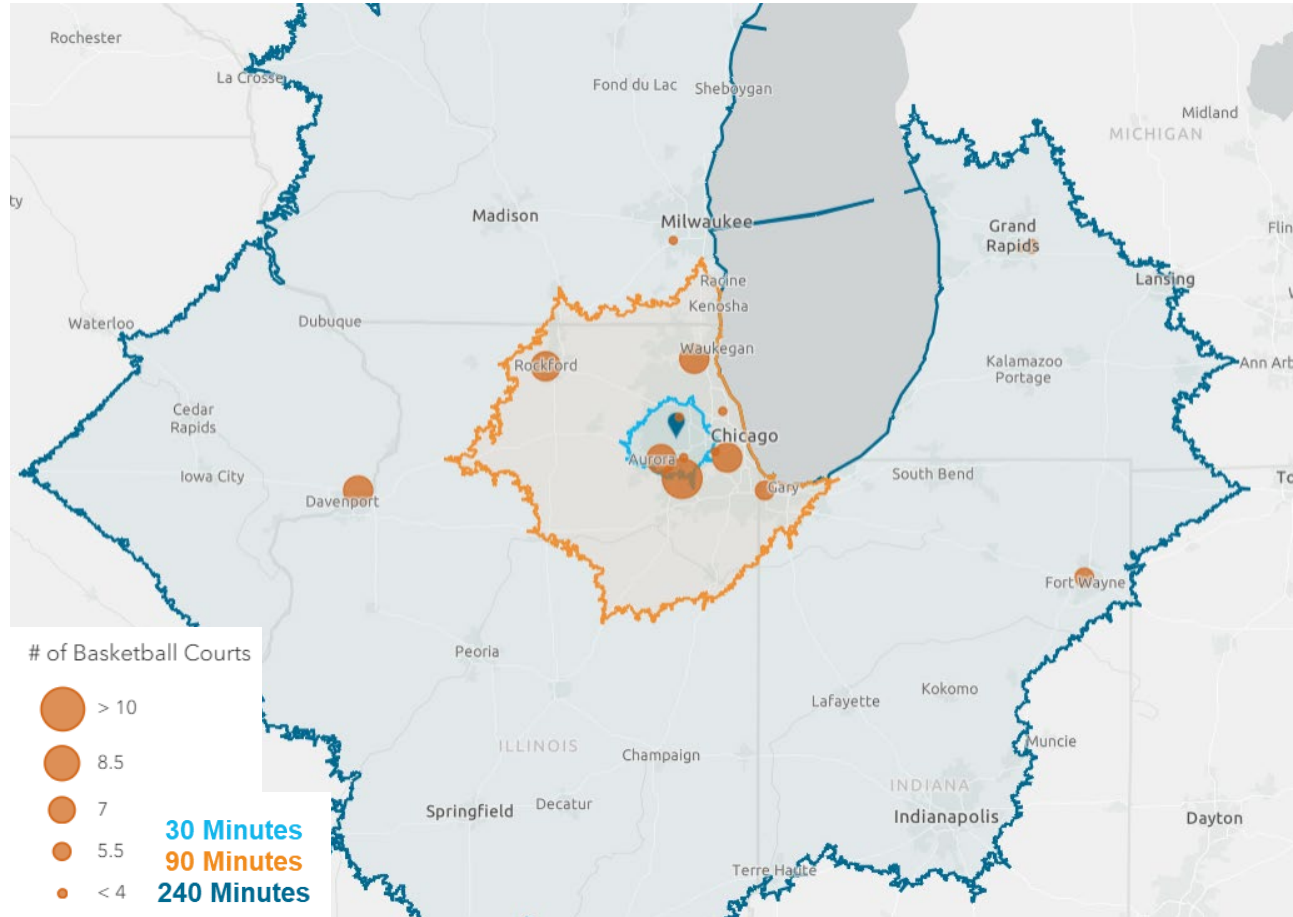
Gap Analysis

Previous Attempts at Sports Facilities in DuPage County



Gap Analysis

Inventory of Facilities – Indoor

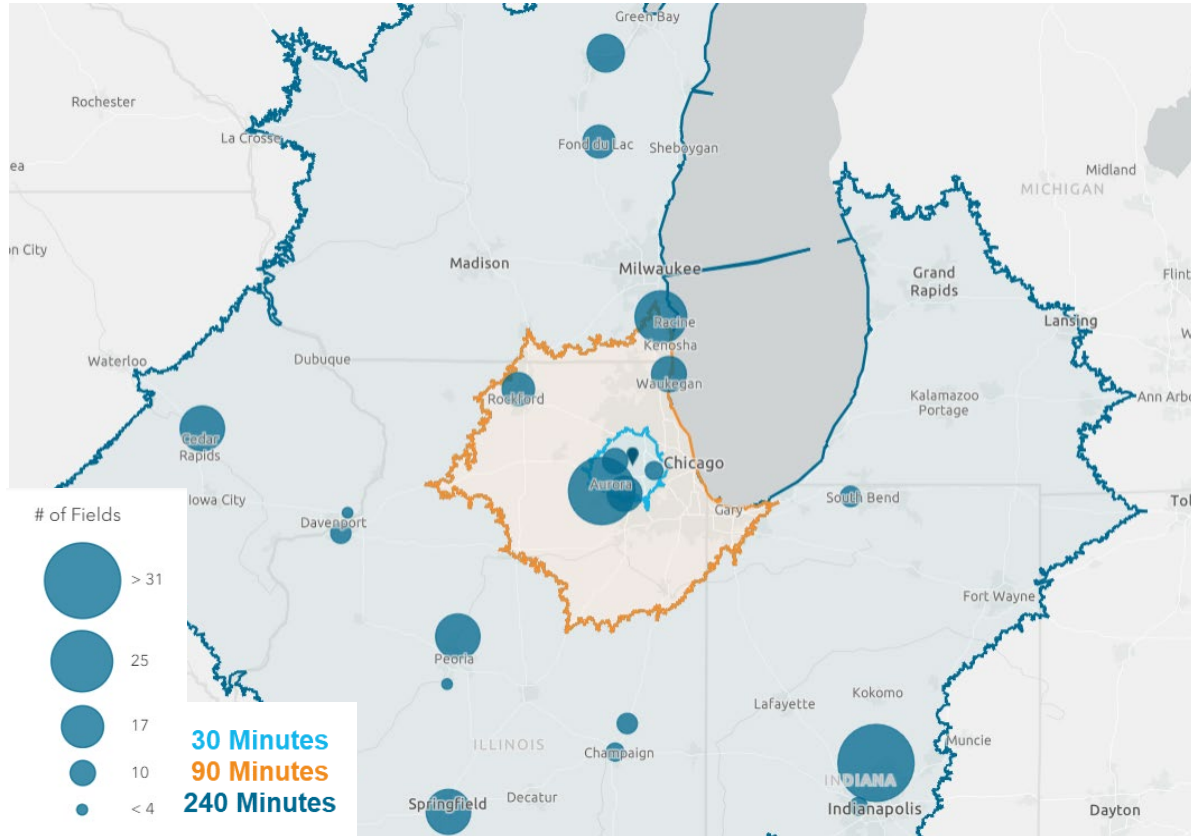


DuPage County Regional Indoor Sports Facilities			
Venue	Location	Distance to Fairgrounds (miles)**	# of Basketball Courts
West Suburban Sports Complex	Lisle, IL	10.1	4
The Sports Center - Schaumburg Parks District	Schaumburg, IL	10.7	4
Great Lakes Volleyball	Aurora, IL	11.5	8*
McCook Athletic & Exposition	La Grange, IL	21	3
Romeoville Athletic & Event Center	Romeoville, IL	22.4	10
Energy VBC	Niles, IL	31.2	7*
Wintrust Sports Complex	Bedford Park, IL	32	8
Canlan Sports Complex	Libertyville, IL	40.4	8
Hammond Sportsplex	Hammond, IN	56	6
UW Health Sports Factory	Rockford, IL	70.5	8
OAW Indoor Sports Complex	New Berlin, WI	107.9	4
TBK Bank Sports Complex	Bettendorf, IA	140.7	8
SportOne Fieldhouse	Fort Wayne, IN	186.2	6
MSA Woodland	Grand Rapids, MI	206.8	4
MSA Fieldhouse	Grand Rapids, MI	214	5

*Volleyball Only Facilities
 **Drive time calculated from DuPage County Fairgrounds
 Source: Johnson Consulting, Relevant Facilities

Gap Analysis

Inventory of Facilities – Outdoor Multipurpose Fields



DuPage County Regional Outdoor Sports Facilities

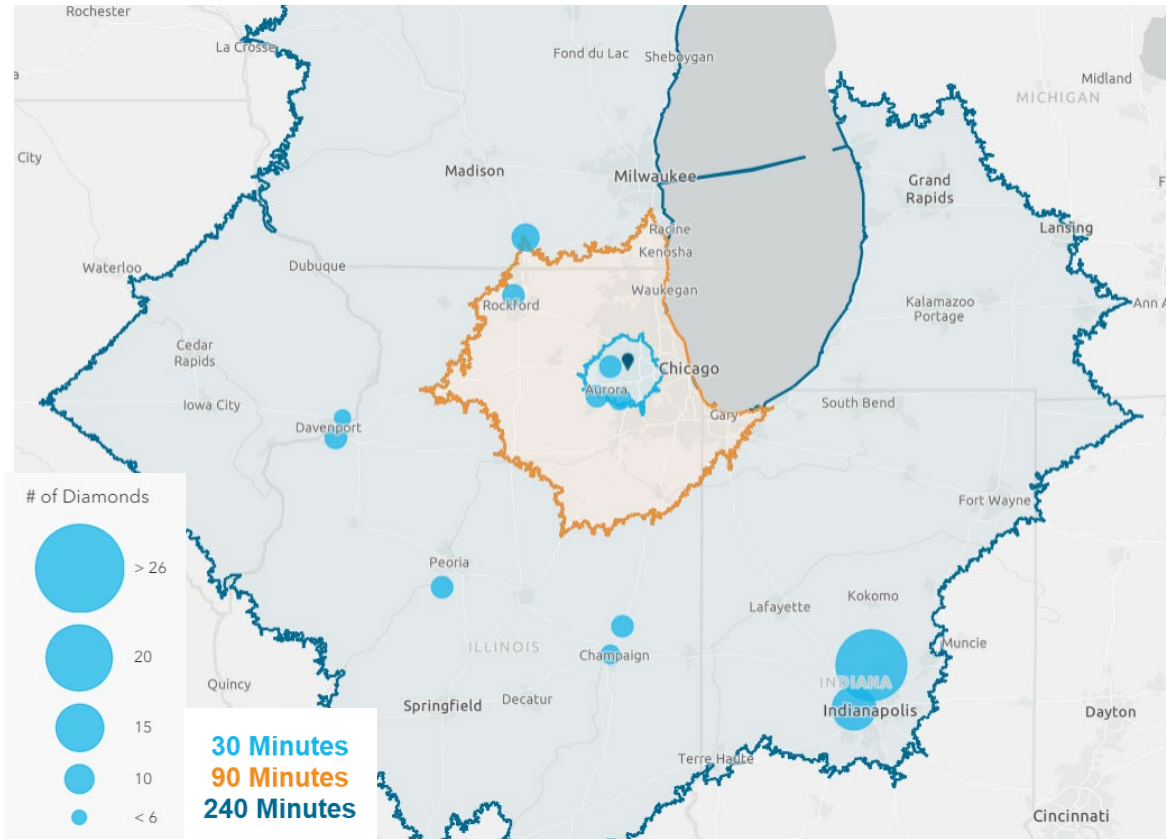
Facility	City	Distance to Fairgrounds (Miles)*	# of Fields
East Side Sports Complex	St. Charles, IL	10.2	10
Frontier Park	Naperville, IL	14	14
Oak Brook Fields	Oak Brook, IL	14.3	7
Stuart Sports Complex	Montgomery, IL	20.6	27
Greg Petry SportsPark	Waukegan, IL	59.2	14
Mercyhealth Sportscore One	Rockford, IL	71.1	13
Score Complex of Racine	Franksville, WI	83.1	21
Indiana Invaders Sports Complex	South Bend, IN	112.3	8
Rantoul Family Sports Complex	Rantoul, IL	138.3	8
Greenvally Sports Complex	Moline, IA	140.1	8
TBK Bank Sports Complex	Bettendorf, IA	140.7	4
Peoria FC United Soccer Complex	Peoria, IL	146.5	18
Dodds Park	Champaign, IL	151.7	7
Pekin Park Dist Sports Complex	Pekin, IL	164.1	4
Springfield Area Soccer Association	Springfield, IL	196	18
Grand Sports Park	Westfield, IN	196.6	31
Fond Du Lac Soccer Complex	Fond Du Lac, WI	200.7	13
MSD Wayne Sports Park	Indianapolis, IN	201.1	7
USA Youth Sports Complex	Appelton, WI	210.1	15
Tuma Soccer Complex	Marrion, IA	234.2	18

*Drive time calculated from DuPage County Fairgrounds

Source: Johnson Consulting, Relevant Facilities

Gap Analysis

Inventory of Facilities – Outdoor Diamonds



DuPage County Regional Outdoor Baseball/Softball Facilities

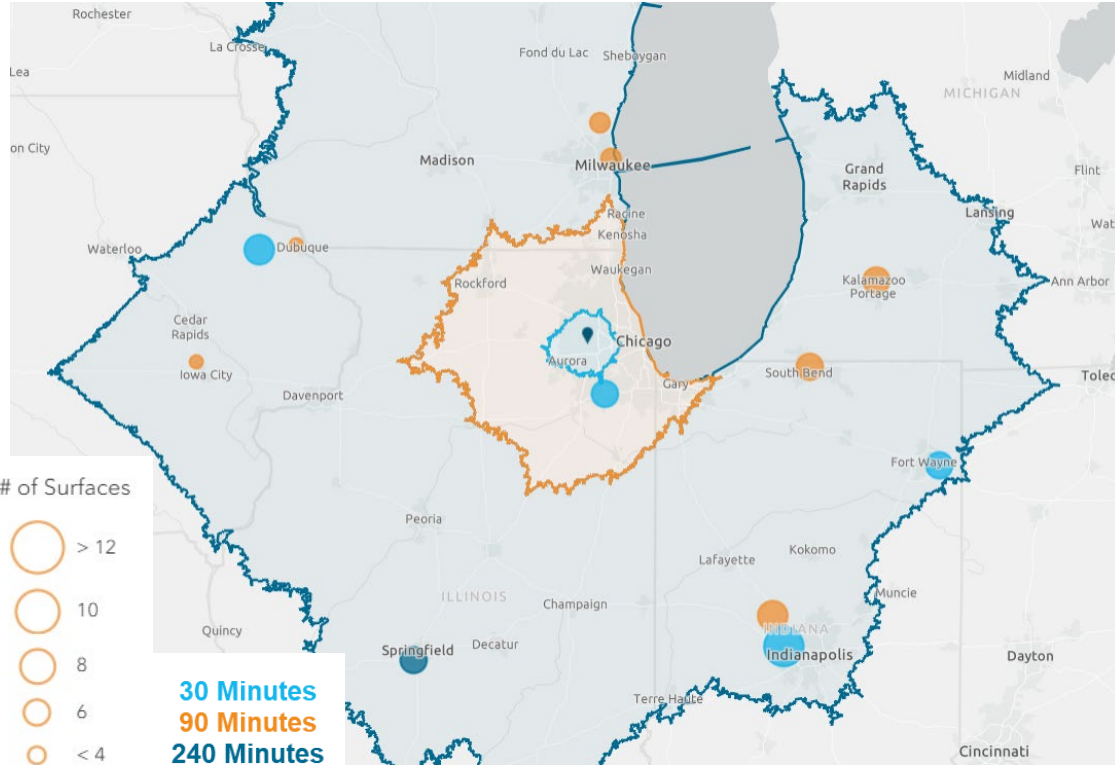
Facility	Location	Distance to Fairgrounds (miles)*	# of Diamonds
East Side Sports Complex	St. Charles, IL	10.2	8
Frontier Park	Naperville, IL	14	8
Stuart Sports Complex	Montgomery, IL	20.6	8
Mercyhealth Sportscore One	Rockford, IL	71.1	8
Janesville Youth Sports Complex	Janesville, WI	91	10
Rantoul Family Sports Complex	Rantoul, IL	138.3	8
Greenville Sports Complex	Moline, IA	140.1	8
TBK Bank Sports Complex	Bettendorf, IA	140.7	6
Dodds Park	Champaign, IL	151.7	7
Pekin Park Dist Sports Complex	Pekin, IL	164.1	8
Grand Sports Park	Westfield, IN	196.6	26
MSD Wayne Sports Park	Indianapolis, IN	201.1	16

*Drive time calculated from DuPage County Fairgrounds

Source: Johnson Consulting, Relevant Facilities

Gap Analysis

Inventory of Facilities – Under Consideration



Regional Facilities Under Consideration

Facility	Location	Distance to Fairgrounds (miles)*	# of Surfaces	Sport
New Lennox Sports Complex	New Lenox, IL	34.2	8	Baseball
Milwaukee Bradford	Milwaukee, WI	103.7	6	Basketball
Cedarburg, WI Sports Complex	Cedarburg, WI	121.6	6	Basketball
Mishawaka Youth Sports Facility	Granger, IN	128.6	8	Basketball
Dubuque Sports Facility	Dubuque, IA	164.5	4	Basketball
Proposed Kalamazoo Facility	Kalamazoo, MI	171.9	8	Basketball
Lebanon Sports Complex	Lebanon, IN	178.7	9	Basketball
Field of Dreams (Dyersville, IA)	Dyersville, IA	187.5	9	Baseball
Brownsburg Sports Complex	Brownsburg, IN	194.6	12	Baseball
Fields of Grace - New Haven	New Haven, IN	195.1	8	Baseball
Scheels Sports Park at Legacy Point	Springfield, IL	197.1	8	Multipurpose
North Liberty IA Palestra Sports Complex	North Liberty, IA	202.4	4	Basketball

*Drive time calculated from DuPage County Fairgrounds

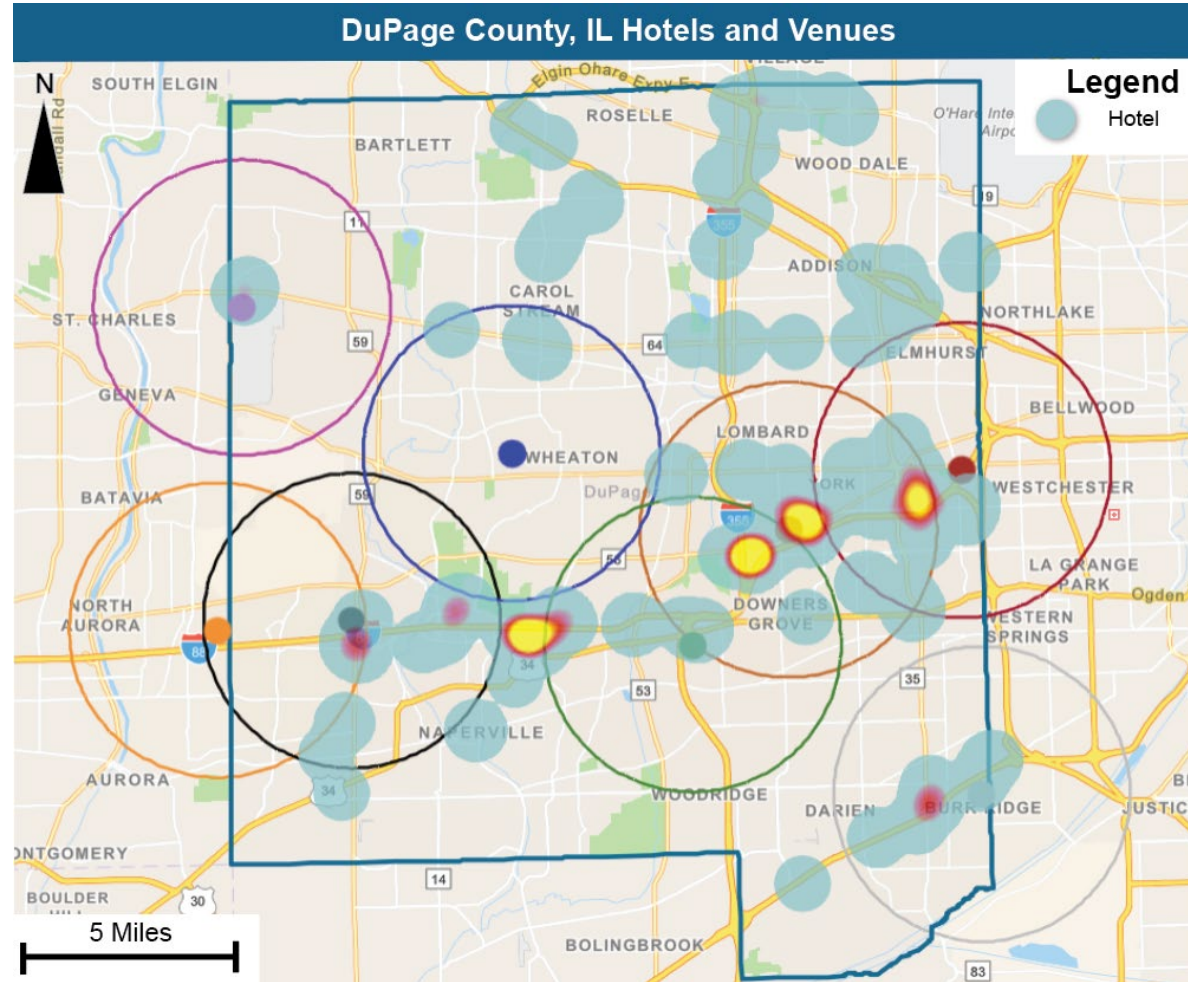
Source: Johnson Consulting, Relevant Facilities

A blue-tinted photograph of a park. In the foreground, a paved path curves across the frame. Several people are walking along the path, including a woman pushing a stroller. In the middle ground, a large, open grassy lawn is visible, with a few people sitting on the grass. The background is filled with numerous trees, some of which appear to be in bloom. The sky is bright blue with scattered white clouds. The overall scene depicts a busy, recreational park environment.

3. Site Analysis

Gap Analysis

Inventory of Facilities – Outdoor



DuPage County Site Key

Key	Site Name	City	Acres
	The Triangle Piece	Oak Brook, IL	11
	Yorktown Mall	Lombard, IL	100
	Downers Grove Site	Downers Grove, IL	38
	Calamos Property	Naperville, IL	11
	DuPage County Fairgrounds	Wheaton, IL	15
	Pheasant Run	West Chicago, IL	107.1
	Aurora - Bilter Road Site	Aurora, IL	50
	Burr Ridge Site	Burr Ridge, IL	15

A photograph of a park scene, overlaid with a semi-transparent blue filter. The scene shows a large green lawn with several people walking on paved paths and sitting on the grass. There are many trees, some with white blossoms, and a blue sky with scattered white clouds. The overall atmosphere is bright and pleasant.

4. National Case Studies

National Case Studies



Cedar Point Sports
Center & Sports Force
Parks



Hammond Sportsplex &
Community Center



Community First
Champion Center







UW Health Sports
Factory



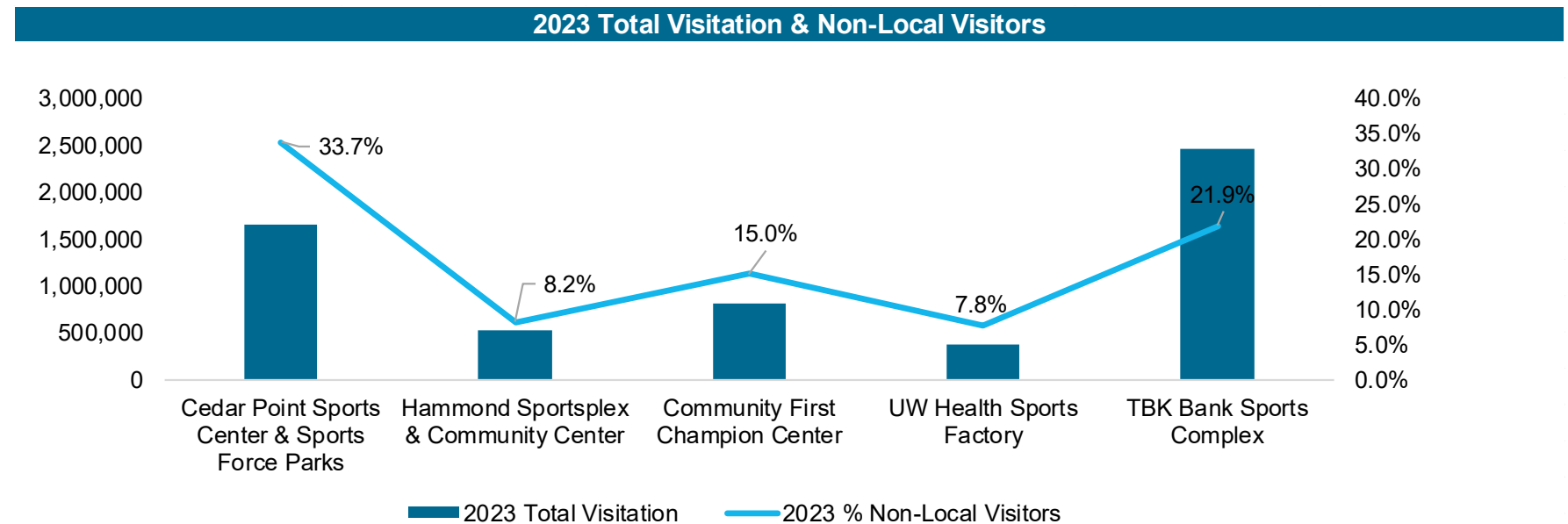
TBK Bank Sports
Complex

National Case Studies – Placer.ai Benchmarking

Placer.ai Data Comparison					
	Cedar Point Sports Center & Sports Force Parks	Hammond Sportsplex & Community Center	Community First Champion Center	UW Health Sports Factory	TBK Bank Sports Complex
2023 Total Visitation 	1,650,803	524,448	816,660	373,798	2,458,853
Avg. Dwell Time (minutes) 	190	146	146	138	134
Visitor Frequency* 	2.99	3.58	3.35	3.17	4.6
2023 % Non-local Visitors* 	33.7%	8.2%	15.0%	7.8%	21.9%

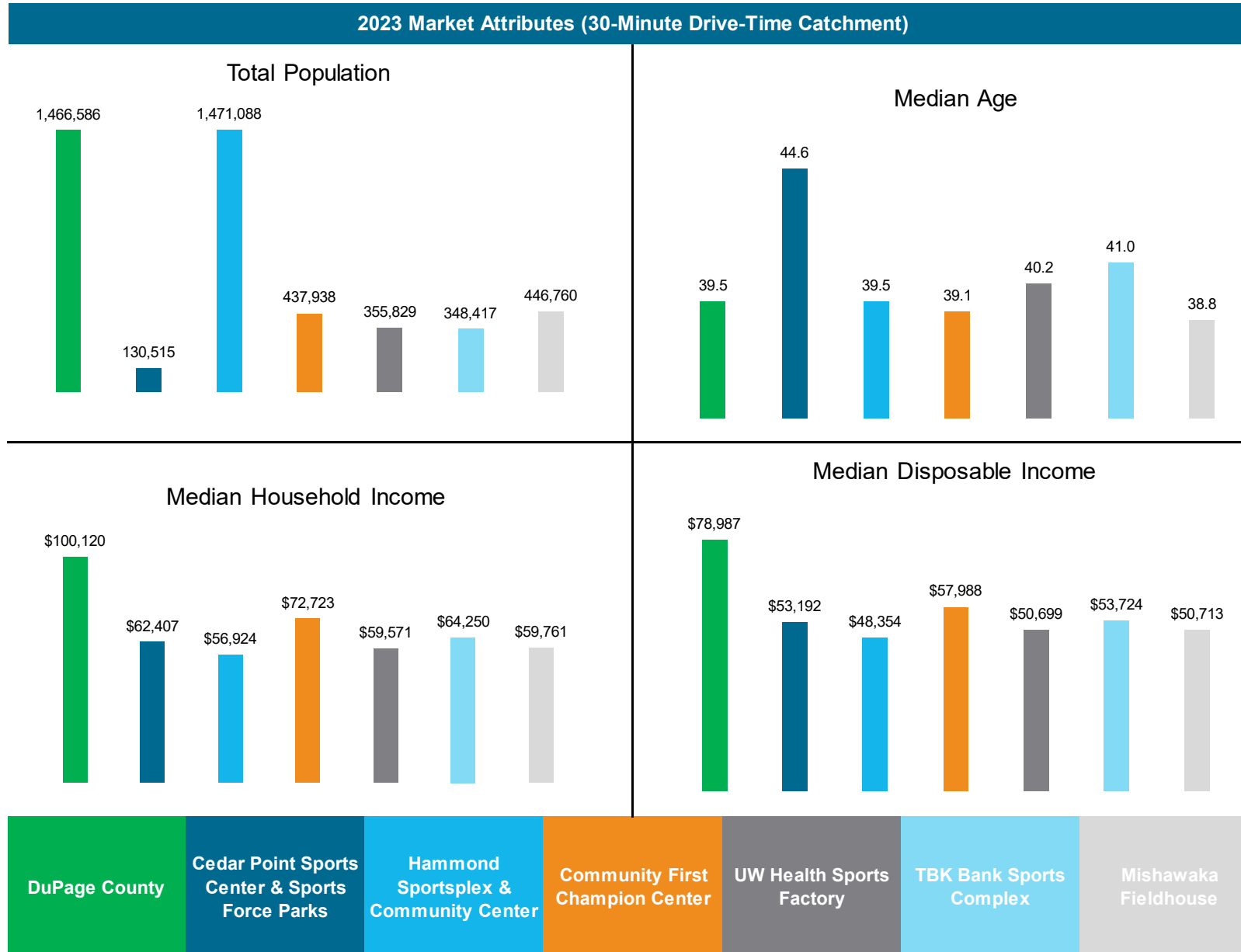
*Visitor Frequency defined by average times a visitor attends a facility

Source: Placer.ai, Johnson Consulting



Source: Placer.ai, Johnson Consulting

National Case Studies – Facility Benchmarking



Source: ESRI, Johnson Consulting

A photograph of a park scene, overlaid with a semi-transparent blue filter. The scene shows a large green lawn with several people walking on paved paths and sitting on the grass. There are many trees, some with white blossoms, and a blue sky with scattered white clouds. The overall atmosphere is bright and pleasant.

5. Preliminary Recommendations

Preliminary Recommendations

Before sharing some preliminary recommendations based on our research to date, it's important to share the definition of success and key objectives of this study provided by the Client group. Based on the input from the County, determining the market demand opportunity for a youth sports tourism-oriented complex(s) capable of hosting large regional/national events within DuPage County would cause increased economic impact within DuPage County with the increase in visitor spending.

Further context on the current state of DuPage County's Sports Tourism facilities is also important in framing the two scenarios presented below. Market demand opportunities for both indoor as well as outdoor are strong within DuPage County. In particular for a multipurpose indoor complex as well as a baseball/softball-oriented complex for outdoor programming. Thus, in an effort to align our recommendations with the definition of success as provided by the Client, it's our opinion that a multipurpose indoor sports complex would best meet that criteria. There are two main driving factors in that preferred

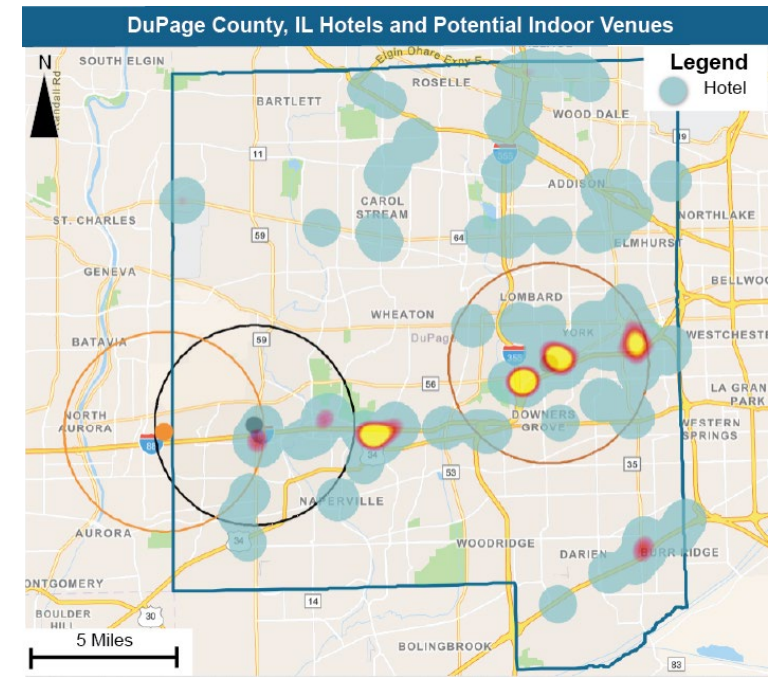
Scenario A, the first factor is the scarcity of large plots of land available to execute a sizable sports tourism outdoor sports complex (at least, 80+ acres needed) and the second factor is the inclement weather and limitation on year-round usage that make an outdoor sports tourism venue less impactful than a year-round indoor venue has the opportunity to provide.

Lastly, the Consulting Team was made aware during our study, that the City of Aurora has an RFQ out for an indoor sports complex that would likely be along a similar size and scale of a Multipurpose Indoor Sports Complex being recommended for DuPage County. However, we are of the opinion there is not enough indoor demand for two large-scale multipurpose indoor facilities to co-exist in the DuPage County area. Thus, the two scenarios outlined by Johnson Consulting are contingent on this Aurora facility being built or not.

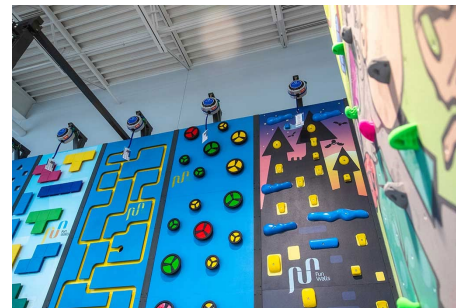
- **Scenario A** is that the Aurora Complex does not get built, leaving DuPage County with an opportunity to build an indoor sports complex that would attract tourism to the county. An indoor facility would help bring youth sports tourism, especially during the winter months for sports such as basketball, volleyball, cheerleading, and dance tournaments. Local restaurants, retail, and hotels would be positively impacted by the flux in spending, but DuPage County would also have a significant community asset when sports tournaments are not being played there.
- **Scenario B** is that the Aurora Indoor Complex does get built, which would put a huge competitor in DuPage County's backdoor. DuPage can also support an outdoor facility, but it would have to be broken up between multiple sites. The limited developable available land in DuPage County necessitates multiple satellite sites for an outdoor facility. There would likely be a total of 15-20 multipurpose fields (soccer, football, lacrosse) and diamonds (baseball, softball) split up between 3-4 sites.

Scenario A – Indoor Multipurpose Athletic Facility

- Big Picture: Single Site
- Facility Amenities
 - 8-10 Hardwood Basketball Courts
 - 1 Multipurpose turf
 - Healthcare tenant space (i.e., Physical Therapy/Sports performance)
 - Café/concessions
 - Family Entertainment Center (i.e., arcade, clip n' climb)
- Viable Site Location:
 - Aurora
 - Lombard/York Mall
 - Calamos Property



DuPage County Site Key			
Key	Site Name	City	Acres
	Yorktown Mall	Lombard, IL	100
	Calamos Property	Naperville, IL	11
	Aurora - Bilter Road Site	Aurora, IL	50

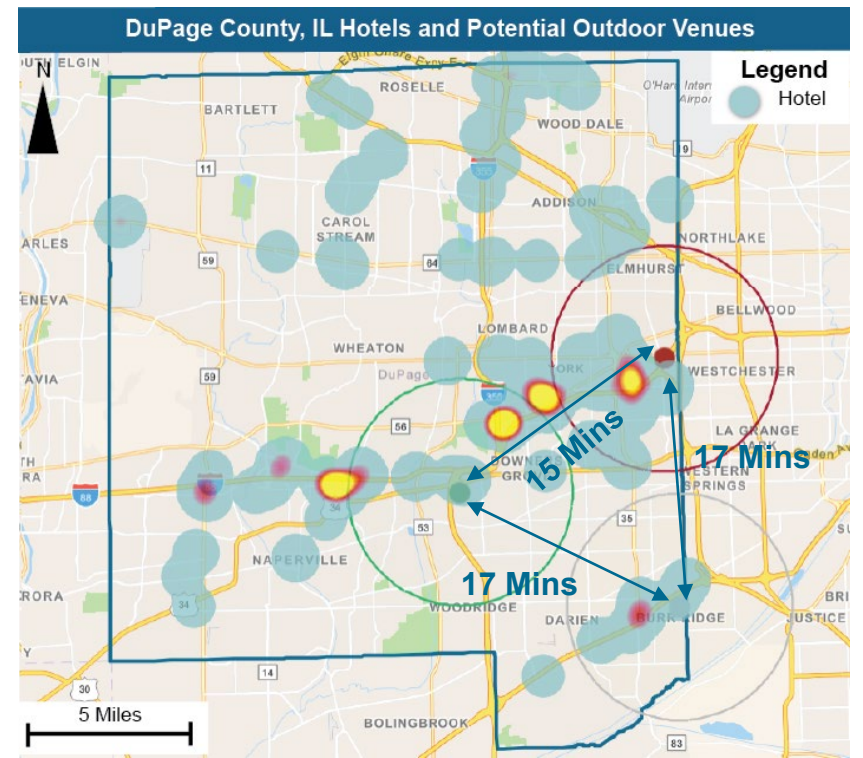


Scenario B – Outdoor Multipurpose Athletic Facilities

- Big Picture: Multiple Sites
- Facilities Amenities
 - 15-20 Total Diamonds/Multipurpose Turf Model
 - 1 wheel per site (4-5 diamonds)
 - Championship field at one location (i.e., Downers Grove)
- Viable Site Location:
 - Oak Brook
 - Downers Grove
 - Calamos Property
 - Burr Ridge



Cedar Point Sports Force Parks



DuPage County Site Key			
Key	Site Name	City	Acres
	The Triangle Piece	Oak Brook, IL	11
	Downers Grove Site	Downers Grove, IL	38
	Burr Ridge Site	Burr Ridge, IL	15



Ripken Pigeon Forge