



FEASIBILITY STUDY FOR A
POTENTIAL NEW INDOOR SPORTS FACILITY
IN ELMHURST, ILLINOIS
NOVEMBER 9, 2016





November 9, 2016

Ms. Laura Guttman
Strategy and Planning Coordinator
Elmhurst Park District
375 W. First Street
Elmhurst, IL 60126

Dear Ms. Guttman:

Conventions, Sports & Leisure International (CSL) is pleased to present this report related to a feasibility study for a potential new Indoor Sports Facility in Elmhurst, Illinois. The overall study involves the analysis of the market, programmatic, financial and economic feasibility of a new Indoor Sports Facility in Elmhurst for the purpose of driving new revenue and economic impact to Elmhurst, as well as enhancing rental, practice and other special event facility alternatives available for residents. The attached report presents our research, analysis and findings and is intended to assist the Elmhurst Park District, the City of Elmhurst, and other stakeholders in evaluating the viability of developing and operating a potential new Indoor Sports Facility in Elmhurst.

The analysis presented in this report is based on estimates, assumptions and other information developed from industry research, data provided by the study's stakeholders, surveys of potential facility users and local representatives, 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 analysis of present and near-term conditions in Elmhurst as well as existing interest levels by the potential base of users of a new Indoor Sports Facility. Any significant future changes in the characteristics of the local community, such as growth in population, corporate inventory, competitive inventory and visitor amenities/attractions, could materially impact the key market conclusions developed as a part of this study. As in all studies of this type, the estimated results are based on competent and efficient management of the potential facilities and assume that no significant changes in the demand 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.

This report has been prepared for the internal use of the Elmhurst Park District and the City of Elmhurst and should not be relied upon by any other party. The report has been structured to assist stakeholders in evaluating market demand, supportable program and the cost/benefit characteristics of a potential new Indoor Sports Facility in Elmhurst and should not be used for any other purpose.

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

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EXECUTIVE SUMMARY

Conventions, Sports and Leisure International (CSL) was engaged by the Elmhurst Park District and the City of Elmhurst (City) to study the feasibility of a new Indoor Sports Facility in Elmhurst, Illinois. The attached report presents a summary of feasibility study findings, involving the analysis of the market, programmatic, financial and economic feasibility of a potential new facility in Elmhurst. The full written report should be reviewed in its entirety to gain an understanding of the study's methods, limitations and implications.

Introduction and Background

The purpose of this study is to:

Analyze the market, programmatic, financial and economic feasibility of a new Indoor Sports Facility in Elmhurst for the purpose of driving new revenue and economic impact to Elmhurst, as well as enhancing rental, practice and other special event facility alternatives available for area residents. Such facilities would offer one or more of the following programmatic components: gymnasium space, indoor turf, pool/natatorium, indoor ice rink.

Specifically, the envisioned facility products would serve to: (1) provide a public resource for local residents (by accommodating local sports and recreation activities); (2) enhance the ability to drive additional revenue for local sports and recreation programs and facilities; and (3) generate new economic impact (through attracting tournaments, competitions, and meets with non-local participants and attendees).

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

- ✓ Experience garnered through more than 500 sports, recreation and event facility feasibility, planning and benchmarking projects throughout the country.
- ✓ Local market visits at the outset of the project, including community and facility tours, and discussions with study stakeholders.
- ✓ In-person and telephone interviews, meetings and focus groups with more than 50 local Elmhurst area individuals, including representatives and individuals affiliated with Elmhurst Park District, City of Elmhurst, DuPage County Convention and Visitors Bureau, local educational institutions, local sports and nonprofit organizations, potential funding partners, municipal government representatives, and other local area individuals.
- ✓ Research and analysis of local market conditions, existing facilities and infrastructure and amateur sports and recreation trends.
- ✓ Benchmarking research and analysis of facility data and interviews conducted with management of nearly 100 competitive and comparable sports and recreation complexes located throughout the region and country.
- ✓ Comparative analysis of socioeconomic data from competitive/comparable facility markets.
- ✓ Completed telephone interviews with more than 50 representatives of sports & rec organizations/governing bodies with state, regional and/or national tournament/meet scope.
- ✓ Online survey of more than 750 Elmhurst and area residents.



Local Market Conditions

The strength of a market in terms of its ability to support and utilize sports and recreation facilities is measured, in part, by the size of the local and regional market area population and its age, income and other characteristics. Other local market characteristics have relevance when considering the attractiveness of a particular community as a host for major amateur sports facilities, including transportation accessibility, climate, existing local inventory of athletic facilities, and visitor amenities.

In addition to the demographic and socioeconomic characteristics of the local and regional market, transportation access to and from a potential new Elmhurst Indoor Sports Facility represents a key element of the viability of any potential facility. Convenient local access to any potential new facility will be paramount to the local and regional sports participants who will represent the majority of users of a potential new facility, while regional access characteristics will likely influence the ability of the venue to attract tournaments drawing teams from throughout Illinois, the Midwest and beyond. Industry research indicates that participants in youth and adult sports tournaments are willing to travel, on average, up to three hours to participate in regional tournaments. The population within a 180-minute drive time of Elmhurst is nearly 17.2 million, providing a significant population base from which the proposed facility could draw tournament participants. Additionally, large metropolitan areas such as Milwaukee, Indianapolis, St. Louis, Minneapolis and Detroit are located just outside of the 180-minute “driving” distance, though well within a day’s drive. Further, Elmhurst’s proximity to O’Hare International Airport opens access to markets throughout the country and the world. These communities represent potential sources of teams for regional and national tournaments, meets or competitions held at a potential new Elmhurst Indoor Sports Facility.

While a number of sports and recreation facilities, pools and fields exist throughout Elmhurst, the area is lacking a significant concentration of such facilities in a single location. Many communities have seen that developing new sports facilities benefits the local sports market by consolidating activities and facilities at one single site, and such developments have assisted in recreational activity participation growth in a given area. While York High School and Timothy Christian Schools offer five and four indoor courts, respectively, the greatest single concentration of courts is the three available at York’s fieldhouse. Additionally, while there are three 25-yard pools in Elmhurst, pools at Courts Plus and the YMCA are somewhat limited by the membership-driven operations of their venues. Further, while elementary, middle and high schools accommodate a significant amount of indoor gym-space and swimming pool demand, shrinking school budgets and booking priorities that reserve gym and pool space for school-related functions first, reliable access to these venues is becoming increasingly sparse.

With respect to ice rink and indoor turf facilities, the facilities available are not capable of hosting regular league play. Collectively, these facilities were originally envisioned to accommodate local demand, and have thus far accomplished that goal. However, with the continued growth of the Elmhurst market, the existing local facilities are increasingly limited in their ability to accommodate existing local demand.

Moreover, any envisioned indoor Elmhurst sports facility designed with appropriate quality and volume standards would allow the area to be a more marketable tournament/competition destination—in terms of offering a quality indoor competition gymnasium with a critical mass of courts would serve as the central tournament location, rather than spreading games across a number of limited court facilities (which tends to be much less desirable, particularly for major traveling tournaments).

Non-local participating teams at any potential Indoor Sports Facility would have a positive impact on the Elmhurst economy by supporting area hotels, restaurants and other establishments during their visit to the area. Economic impact generated by non-local participants and their families is typically a critical reason for the consideration of public investment in these types of larger sports and recreational facilities. Offering

an appropriate number of facilities to attract a critical mass of non-local tournament, meet or competition participants is an important factor in generating this economic impact. However, the ability of the local market to provide an adequate number of hotels that are within reasonable driving distance from the potential facilities is also a key element for ensuring that the economic benefit created by hosting amateur sports events is maximized within the local community and a key consideration for sports organizations selecting potential tournament, meet or competition destinations.

The overall area hotel room inventory (nearly 500 rooms in Elmhurst and 10,000 throughout DuPage County) is believed to be sufficient for the types of tournaments that could be accommodated by a potential new Elmhurst Indoor Sports Facility, while still accommodating business and other leisure travelers. Participants and family members traveling to attend tournaments, meets and competitions at indoor sports facilities tend to prefer more affordable, limited service hotel properties. The existing hotel inventory in Elmhurst and DuPage County is of a sufficient level and diversity of products/price points to support potential new indoor sports facility development.

Non-local tournament, meet and competition organizers and participants can focus, in part, on the appeal of a destination when making a decision on whether to attend. The variety and number of attractions available throughout Elmhurst and the greater-Chicago metropolitan area may serve as a foundation on which to increase the economic benefits associated with increased non-local attendance at tournaments, meets and competitions held at a potential new Elmhurst Indoor Sports Facility. Overall, the Elmhurst area's array of attractions and general destination appeal is considered to be relatively strong for a community its size, with the destination's greatest strengths lying in its accessibility, affordability and strong local demographic and socioeconomic base.

Competitive and Comparable Facilities

The viability of any potential new Indoor Sports Facility in Elmhurst is dependent, in large part, on its position in the competitive sports facility landscape, which will directly influence its ability to attract league play and tournaments/meets from the regional market. While there are a significant number of facilities throughout the greater Chicago metropolitan area, the Libertyville Sports Complex is the only facility within 40 miles of Elmhurst that offers more than four courts at one single location (the Libertyville Sports Complex offers eight indoor basketball courts). Similarly, there are currently no 50-meter indoor pools throughout the Chicago metropolitan area; however, plans are in place to develop a 50-meter pool, with a warm-up/leisure pool and seating for competitions in Westmont, just south of Elmhurst. This would be a significant competitor to any new aquatics-oriented Indoor Sports Facility developed in Elmhurst.

Conversely, there are moderate levels of competition throughout the market for both indoor turf and ice facilities. As such, it will be critical for Elmhurst to determine whether there is sufficient local demand for these facilities, as the competitive environment for non-local tournaments, meets and competitions is considered moderate.

More than 40 indoor sports facilities offering dedicated or combined use facilities throughout the country were reviewed, including 13 gymnasium facilities, 9 indoor turf facilities, 11 indoor ice rinks and 11 natatoriums. These venues were targeted to provide comparative market context for a potential new Elmhurst Indoor Sports Facility, as well as to assist in formulating hypothetical utilization of any new facility product in Elmhurst.

The population, average household income and corporate base levels of the primary market area surrounding Elmhurst compares favorably to the markets offering comparable indoor sports facility components. Data was collected regarding estimated construction costs, financial operations and event levels among a critical number of these venues. The implications of these metrics vary greatly depending

on the ultimate facility program of event space and operational mandate (i.e., privately owned/operated for-profit, municipally-run with the goal of serving the community; run with the goal of attracting economic impact generating events, etc.). It will be important to carefully consider facility program development options and operational mandates when identifying supportable facility programming and funding opportunities for facility development and operations.

Market Demand

The results of the market demand analysis conducted for this study suggest that strong estimated local and non-local demand exists for a gymnasium sports and recreation facility and for an ice sports and recreation facility. The largest accumulation of indoor court spaces is at York High School's fieldhouse, and they are becoming increasingly difficult to access. Developing a minimum four-court facility would be able to accommodate latent local demand. However, in order to attract the larger, non-local tournaments for which demand was also noted, a larger facility (minimum six courts) would be required.

In terms of demand for ice rink space, the only existing local facility is the outdoor rink at the YMCA. All locally-based club hockey, figure skating, learn-to-skate and other ice rink user groups are forced to utilize facilities outside of Elmhurst. Demand was noted for a two-sheet ice facility to accommodate both local and potential non-local tournament, camp and/or clinic activity. Clubs such as York, Fenwick and the Chiefs would all welcome an opportunity to practice and play home games in Elmhurst.

An important consideration in the site selection process for an ice facility, should the decision be made to move forward with developing an ice arena, will be to allow for potentially developing a third sheet of ice at some point in the future. Current demand indicates a two-sheet facility; however, anticipated future growth in local club, figure skating and other programs may eventually require access to a third sheet of ice.

Moderately strong local and non-local demand was noted for an indoor turf facility, as well as for an indoor pool/natatorium. The only existing indoor turf facility in Elmhurst is not large enough to accommodate practice, game, training and other demand. York High School's fieldhouse has served demand well; however, increasingly organizations are looking for a turf field experience for practices and games, and try to avoid practicing on hardwood. As such, these organizations are currently forced to seek indoor turf space outside of Elmhurst city limits.

The Elmhurst and greater Chicago metropolitan area also both presently have limited facility options for swimming. Specifically, there are three 25-yard pools in Elmhurst, but no competition-ready 50-meter pool. Increasingly swim clubs and programs seek out 50-meter pools to be able to host long-course events, as well as short-course by swimming cross pool, rather than along the long axis. York High School currently offers an indoor 25-yard pool that is fairly well maintained and capable of hosting many locally-based events.

Importantly, there is a proposed aquatic center project in Westmont, Illinois that is currently being considered. The development would consist of a 50-meter competition pool and supporting leisure pool in conjunction with an apartment complex. Should this project move forward, it would present a significantly competitive venue for attracting high-profile state, regional and national meets and competitions. However, even if this project were not to move forward, the local demand was not identified as being sufficient to be able to support operations of a 50-meter pool. York High School swimming and Elmhurst Swim Club did not indicate an interest to relocate to a new facility, even if the facility was of a higher quality than their pool. Other swim clubs and programs have noted a desire for additional pool space and time; however, none of these organizations likely have the financial wherewithal to contribute significantly to construction costs and/or ongoing operations.

Supportable Program & Scenarios

Based on the results of the market analysis, it is recommended that any potential new Indoor Sports Facility in Elmhurst focus on one or more of the following three types of facilities:

1. Ice Arena Facility

- Two sheets (NHL-sized, 200' x 85'), seating for 1,500 and 250.
- Four to six locker rooms.
- Basic additional characteristics/amenities:
 - Pro-shop.
 - Concession facilities.
 - Warm-up areas.
 - Approximate 60,000-square foot facility.

2. Gymnasium Facility

- Six hardwood courts (6 basketball courts, 12 volleyball courts).
- Concession facilities.
- Bleachers, netting equipment, scoreboards, and other standard amenities.
- Approximate 80,000-square foot facility (with approximately 60,000 square feet of floor space).

3. Indoor Turf Facilities

- Two full sized fields (185' x75' or 180' x 80', configurable down to smaller fields).
- Minimum 30' ceiling height.
- Dropdown batting cages for baseball/softball.
- Approximate 40,000-square foot facility.

Building on these market supportable program findings and based on conversations with the study group (representatives of the Elmhurst Park District and the City of Elmhurst), the following three facility scenarios were identified for further analysis:

- Scenario 1: Hardcourt Sportsplex
- Scenario 2: Hardcourt Sportsplex Plus Turf
- Scenario 3: Ice Complex

Scenarios 1 and 2 involve a potential Indoor Sports Facility that is focused around a facility with a hardwood sports surface, with Scenario 2 consisting of a larger facility with an added area of turf space. Scenario 3 would represent an ice complex only, with two sheets of ice.

Utilization and Attendance

A detailed utilization model was developed to consider a large number of variables and inputs to analyze each sport/use for each facility development scenario under review. For instance, when considering different types of usage (i.e., use from local leagues/clubs versus non-local tournaments/meets versus clinics/camps/lessons versus open recreation, etc.), separate assumptions were used for the development of usage and attendance (participants and spectators).

The following exhibit presents a summary of total estimated attendance and attendee origin associated with the three identified development scenarios. As shown, upon stabilization (assumed fourth year of operations), the potential new Elmhurst Indoor Sports Facility is estimated to attract between 214,000 and 297,000 attendees annually, depending on scenario. While each scenario is expected to generate significant visitation and new hotel room nights for Elmhurst through non-local activity, more than half of the estimated attendance under each scenarios is expected to consist of utilization by Elmhurst residents.

Total Estimated Attendance by Scenario

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
ESTIMATED ATTENDANCE			
Local:			
Elmhurst Residents	116,532	161,201	138,561
Non-Local:			
Non-Resident Day Trippers (Tournaments)	15,120	21,168	6,350
Non-Resident Day Trippers (Other)	54,810	76,338	79,600
Non-Resident Overnight Stay	<u>27,918</u>	<u>38,185</u>	<u>14,891</u>
Total Attendance	214,380	296,892	239,402
ESTIMATED HOTEL ROOMS			
Total Hotel Room Nights	11,167	15,274	5,956

Note: 'Other' Day Trippers refers to non-Elmhurst resident attendees of leagues, lessons, clinics, etc.

Costs/Benefits

A cost/benefit analysis was conducted relating to potential construction and operating costs and estimated economic impacts associated with each of the three identified scenarios for a new Elmhurst Indoor Sports Facility.

Annual Operating Costs

In terms of annual operating costs, upon stabilization of operations (assumed to occur by the fourth year) and not including debt service, a potential new Elmhurst Indoor Sports Facility (under Scenarios 1 and 2) is estimated to generate an operating profit of approximately \$149,000 and \$270,000 per annum, respectively. This projected financial performance would be consistent with or better than that of the average comparable facility located throughout the country. Under Scenario 3, a potential new Elmhurst Indoor Sports Facility (consisting of a two-sheet ice complex) is estimated to generate an annual operating loss of approximately \$202,000 per annum. This type of annual operating loss is also consistent with or better than the average comparable ice arena facility located throughout the country.

Construction Costs

In terms of construction costs, order-of-magnitude construction costs (excluding site costs) for a potential Elmhurst Indoor Sports Facility are estimated to range between \$22.8 million and \$32.2 million (in 2016 dollars). Construction costs tend to vary widely among comparable sports facility 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. Importantly, a detailed architectural concept, design and costing study would be required to specifically estimate construction costs for a potential Elmhurst Indoor Sports Facility.

Economic Impacts (Quantifiable)

The total output (direct spending plus indirect/induced spending) for a potential Elmhurst Indoor Sports Facility in a stabilized year of operations (assumed fourth full year of operation) is estimated to range between approximately \$11.9 million and \$16.5 million per annum (in 2016 dollars), depending on the scenario. Additionally, this spending is estimated to annually support between \$5.9 million and \$8.2 million in earnings (or personal income) in the local Elmhurst economy, along with between 153 and 212 full and part-time jobs throughout the Elmhurst economy.

Economic Impacts (Non-Quantifiable/Intangible)

Some benefits related to the operations of a potential Elmhurst Indoor Sports Facility cannot be quantitatively measured. First, the estimated quantitative impacts of the potential facility in Elmhurst do not include benefits that may be generated from other private sector developments surrounding the facility such as hotel, restaurant, other retail, and entertainment establishments. Additionally, other potential qualitative benefits for Elmhurst and its residents could include:

- Enhanced sports and recreation opportunities for local youths and adults;
- Reduction in the need for residents to leave Elmhurst for sports and recreation activities;
- Synergy with the other sports, recreation, entertainment and leisure facilities leading to increased tourism activity;
- Enhanced community pride, self-image, exposure and reputation; and,
- Enhanced regional exposure.

Funding Options

Conversations with City of Elmhurst and Elmhurst Park District representatives have indicated that General Obligation bonding is likely the most viable source of funding for developing a potential new Indoor Sports Facility in Elmhurst. This funding would be backed by the full faith and credit of the City and/or the Park District. While a property tax revenue increase is an option, it is not the only viable mechanism for generating the annual revenue necessary for debt service. Developing a TIF district or extending an existing district nearing closure may provide a significant source of annual revenue. An important consideration will be the ultimate site selected for one or more indoor sports facilities, as it will be important to ensure that attendance and activity generated by sports facility operations would reasonably be expected to impact activity within the designated district.

Another potential source of funding would be through an increase in the City's collection of the hotel/motel tax. The total effective hotel/motel tax rate is currently at 10 percent, and a one percent increase is expected to generate approximately \$100,000 annually. As with TIF district funding, it will be important to consider the type of event activity within a potential Elmhurst Indoor Sports Facility, specifically whether a significant enough portion of utilization will be generated from individuals requiring an overnight stay. Additionally, site selection for any potential new indoor sports facility may have a significant impact on this potential funding source, as locating a facility too close to hotel properties outside the Elmhurst city limits may limit the overall impact realized by local hotel/motel operators.



With respect to engaging the private sector, naming rights sales have been increasingly utilized for amateur sports facility development and/or ongoing operational funding. One example is the recently opened UW Health Sports Factory in Rockford, Illinois that is collecting \$175,000 annually with payments inflated annually to arrive at a ten-year private investment of \$1.9 million. Fully vetting potential private funding partners such as Edward-Elmhurst Health, local sporting goods retailers or other such private sector partners could provide important funding assistance. Important considerations will include, but not be limited to, the nature of the facility, the potential local and non-local reach of leagues, tournaments, clinics, camps and competition, ancillary facilities that may be developed within the venue and the potential opportunity for the funding partner to have increased access to the venue.

These partnerships may extend beyond the private sector. Consideration of partnerships with Elmhurst College, IC Prep or other local educational institutions may provide an opportunity to minimize the funding burden on the private sector. One example of a potential partnership opportunity would be for the City and/or Park District to participate in construction funding, while the educational institution would operate the facility without requiring public assistance for ongoing financial operations. Another opportunity may be to enter into an agreement for upfront payment of rent to provide an infusion of funds for debt service. In either scenario, it will be critical that the City, Park District and/or educational institution enter into a use agreement that would guarantee access and rates for both parties. Both options provide opportunities to mitigate some of the risk that would be incurred by the public sector, while raising the overall profile of the facility/facilities by providing an opportunity to attract regular high school and/or collegiate games, tournaments and competitions.

Lastly, consideration could be given to partnering with a private equity partner who would assume the majority burden of construction funding and operating risk. One example of this is Bo Jackson Elite Sports, in Lockport, Illinois, operated by Sports Facilities Management (SFM). This is a privately built facility consisting of a 115,000-square foot hard/soft indoor facility, with a focus on turf fields. If it were to be developed in Elmhurst, such a facility would ideally be co-located at a larger complex (i.e., next to courts facility and/or ice complex). Public contribution would be limited (from as little as land, to land plus incentives, depending on negotiations and outcome/use expectations), with an opportunity to leverage \$7.0 million or more in private investment. While this model may not be optimized for maximizing the accommodation of the types of local league play and recreational opportunities desired by the City, midweek access for local clubs and organizations could be protected through upfront negotiations. Additionally, the consolidated private management of a larger complex (i.e., the privately-led turf facility plus a publicly-led courts facility and/or ice complex) could be an opportunity to further defray public sector costs and enhance outcomes.

1.0 INTRODUCTION

Conventions, Sports and Leisure International (CSL) was engaged by the Elmhurst Park District and the City of Elmhurst (City) to study the feasibility of a new Indoor Sports Facility in Elmhurst, Illinois. The contracted study involves the analysis of the market, programmatic, financial and economic feasibility of a potential new facility in Elmhurst.

This draft report outlines the key findings associated with our research and analysis and is intended to assist the Elmhurst Park District, City of Elmhurst, and other stakeholders in evaluating the viability of developing and operating a potential new Indoor Sports Facility in Elmhurst.

The purpose of this study is to:

Analyze the market, programmatic, financial and economic feasibility of a new Indoor Sports Facility in Elmhurst for the purpose of driving new revenue and economic impact to Elmhurst, as well as enhancing rental, practice and other special event facility alternatives available for area residents. Such facilities would offer one or more of the following programmatic components: gymnasium space, indoor turf, pool/natatorium, indoor ice rink.



Specifically, the envisioned facility products would serve to: (1) provide a public resource for local residents (by accommodating local sports and recreation activities); (2) enhance the ability to drive additional revenue for local sports and recreation programs and facilities; and (3) generate new economic impact (through attracting tournaments, competitions, and meets with non-local participants and attendees).

Potential investment could involve a new and/or enhanced facility product designed to accommodate one or more sports and recreation types, specifically:

A state-of-the-industry indoor gymnasium facility would be designed with sufficient flexibility and standards to attract a variety of sports/rec activities, such as basketball, volleyball, wrestling, dance, cheerleading, martial arts and other such activities.

A state-of-the-industry indoor turf facility designed with sufficient flexibility and standards to attract a variety of sports/rec activities, such as soccer, football, lacrosse, baseball, softball and other such activities.

A state-of-the-industry natatorium would be designed to offer a high-quality, state-of-the-industry indoor aquatic facility appropriate for accommodating competitive swimming and diving programs, area school programs and local swim clubs, attracting non-local competitions/meets, as well as accommodating swim lessons, therapy and general recreation purposes.

A state-of-the-industry indoor ice arena would be designed with sufficient flexibility and standards to attract a variety of sports/rec activities, such as hockey, ice skating, local school and park programs, and other such programming. Included in this type of facility is multiple sheets of ice equipped with adequate locker space, and pro-shop services.

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

- ✓ Experience garnered through more than 500 sports, recreation and event facility feasibility, planning and benchmarking projects throughout the country.
- ✓ Local market visits at the outset of the project, including community and facility tours, and discussions with study stakeholders.
- ✓ In-person and telephone interviews, meetings and focus groups with more than 50 local Elmhurst area individuals, including representatives and individuals affiliated with Elmhurst Park District, City of Elmhurst, DuPage County Convention and Visitors Bureau, local educational institutions, local sports and nonprofit organizations, potential funding partners, municipal government representatives, and other local area individuals.
- ✓ Research and analysis of local market conditions, existing facilities and infrastructure and amateur sports and recreation trends.
- ✓ Benchmarking research and analysis of facility data and interviews conducted with management of nearly 100 competitive and comparable sports and recreation complexes located throughout the region and country.
- ✓ Comparative analysis of socioeconomic data from competitive/comparable facility markets.
- ✓ Completed telephone interviews with more than 50 representatives of sports & rec organizations/governing bodies with state, regional and/or national tournament/meet scope.
- ✓ Online survey of more than 750 Elmhurst and area residents.

In general, for studies of facility projects of this nature, conclusions of a project's feasibility can be assessed in various ways, including:

- Market feasibility – the facility's ability to attract and support levels of facility utilization that are consistent with, or in excess of, industry standards.
- Financial feasibility – the ability of the facility to “break-even” or generate an operating profit focusing only on direct facility-related operating revenues and expenses.
- Economic spending – the facility's ability to generate new spending activity in the local community (i.e., direct and indirect spending that is attributable to non-local sports facility participants/attendees that would not otherwise occur in the local area).
- Tax generation – the ability of the facility to generate new tax revenue for the local area (i.e., tax revenue resulting from direct, indirect and induced spending that is attributable to non-local participants/attendees that would not otherwise occur in the local area).
- Costs/benefits/return on investment – the facility's ability to generate new revenues (i.e., from taxes, operating income, ancillary facility-related revenues) in excess of quantifiable facility-related costs (i.e., construction costs, operating costs, capital reserves, etc.).
- Intangible benefits/public good – the ability of the facility to represent an important resource for the local community, regardless of financial or economic concerns. The facility would represent high-quality athletic and recreation facilities that the local community presently lacks—a benefit that is not easily quantifiable. These types of benefits add to the local community's “quality of life” similar to civic centers, libraries, museums, parks, theaters and other public facilities/amenities.



When evaluating the feasibility of a potential a new Indoor Sports Facility, communities throughout the country have differed in the specific criteria that best reflect the definition of “feasible” for their community. For instance, one community may focus more on the ability of the project to be operationally self-supportive or require below a certain threshold of public sector contribution, rather than the intangible “public good” aspects the project would provide local residents at a higher level of upfront or ongoing public sector participation. The research, data, information and analysis provided through this study is intended to allow Elmhurst community constituents draw their own informed conclusions concerning the “feasibility” of a potential new Indoor Sports Facility in Elmhurst.

2.0 SPORTS PARTICIPATION TRENDS

The purpose of this section is to provide an overview of sports participation trends in the United States. An understanding of these trends at a national, regional and local level provides a framework from which to assess potential demand for a potential new Indoor Sports Facility in Elmhurst.

The statistical data presented in this section was derived from the Sporting Goods Manufacturer's Association (SGMA) and the Sports Business Research Network (SBRNet). Research information from the Sporting Goods Manufacturer's Association is derived from a study based on approximately 40,000 interviews encompassing youth and adult sports participation. SBRNet compiles studies from organizations such as the National Sporting Goods Association (NSGA), which publishes a comprehensive bi-annual report of sports participation in the United States. The report contains participation data which is gathered to analyze trends and patterns within 51 sports and activities.

The remainder of this section presents relevant information on sports participation trends for sports that a potential new Indoor Sports Facility in Elmhurst could potentially host.

National Sports Participation Rates

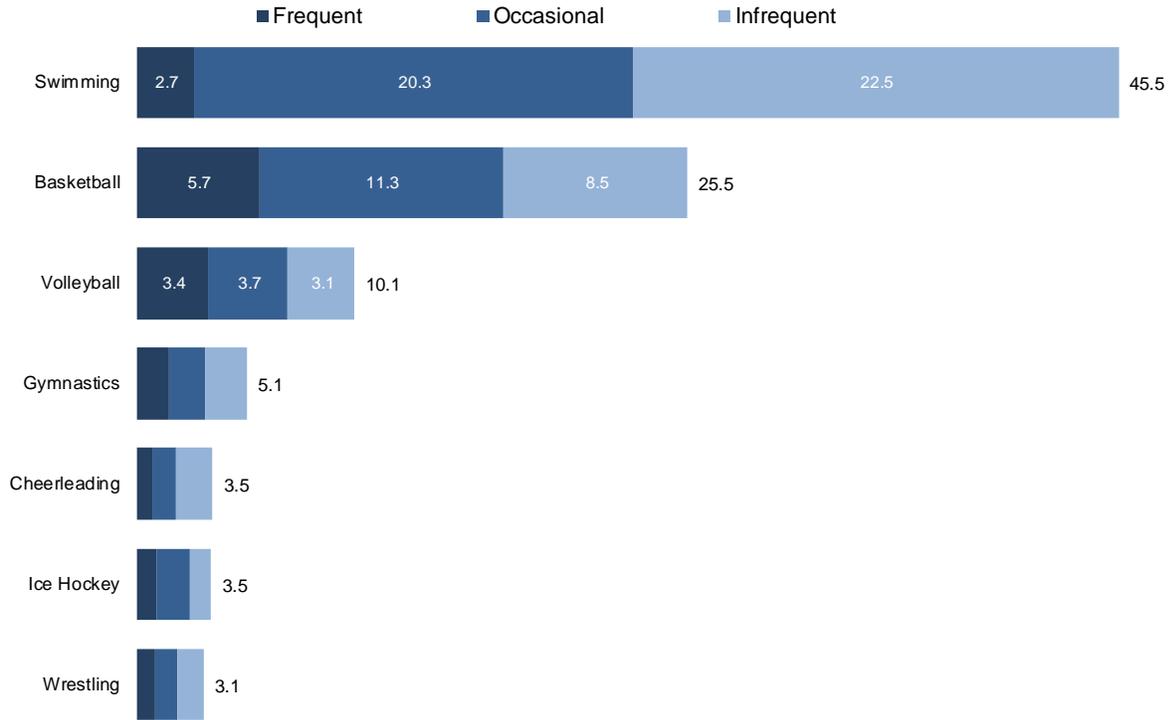
The information on the following pages summarizes the SGMA study completed in 2014. Cumulative national sports participation levels are shown as well as participation trends from 2007 through 2013 for each of the sports identified.

National Sports Participation Levels

Although it is anticipated that the vast majority of programming at a potential new Indoor Sports Facility in Elmhurst would be dedicated to frequent sports participants, it is important to understand the overall participation rates on a national level. National participation levels can provide insights into the overall popularity of a sport, as well as the size of the base from which to attract new frequent participants.

The following exhibit presents a summary of the national participation rates of indoor sports broken out by participation level (i.e. frequent, infrequent and occasional).

**Exhibit 1
National Participation Levels (in millions)**



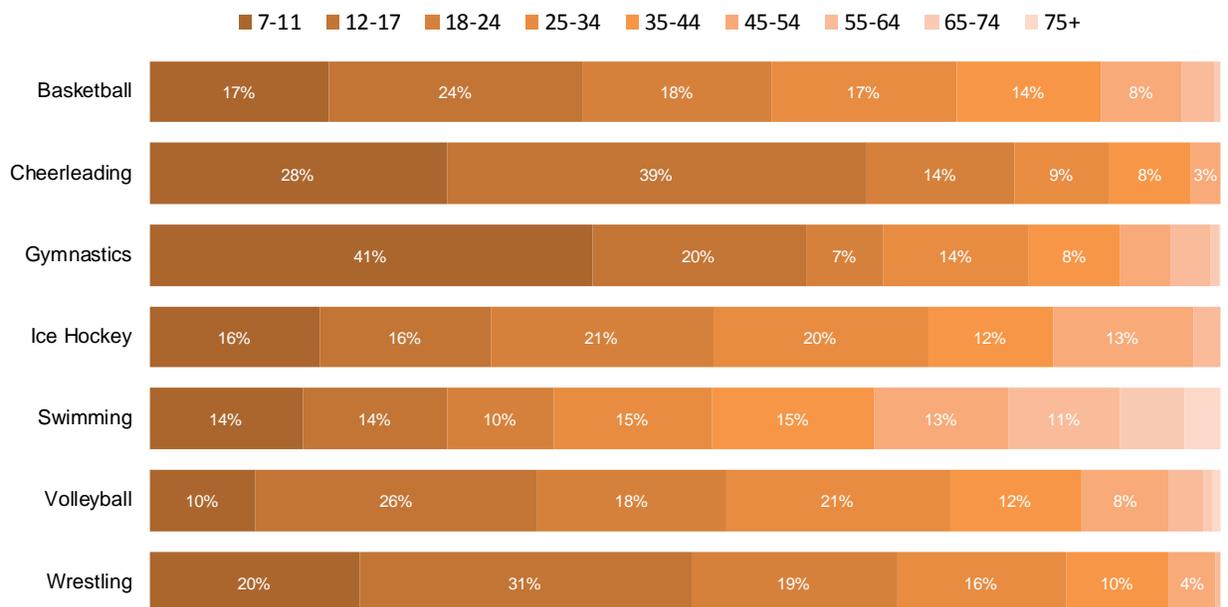
Source: SGMA, 2014

As shown in Exhibit 1, swimming (45.5 million), basketball (25.5 million) and volleyball (10.1 million) have the highest national participation levels among sports requiring an indoor facility. Basketball has the highest number of frequent participants (5.7 million), followed by volleyball (3.4 million), and swimming (2.7 million).

National Participation Levels by Age

Exhibit 2 has been prepared to summarize sports participation levels by age group for each of the identified indoor sports. A potential new Indoor Sports Facility in Elmhurst would be anticipated to be utilized by a variety of age groups, and it is important to understand which sports appeal to each age group in order to consider appropriate programming.

Exhibit 2
National Participation Levels (in millions) by Age



Source: SGMA, 2014

As presented, the 7 to 11 and 12 to 17-year-old age groups represent the largest percentage of national sports participants, with an average of approximately 45 percent in select indoor sports.

Gymnastics has the highest levels of participation (41 percent) among 7 to 11 year-olds, followed by, cheerleading (28 percent), wrestling (20 percent), basketball (17 percent), ice hockey (16 percent), swimming (14 percent) and volleyball (10 percent).

National Participation by Income

Although it is important to understand overall sports participation rates, there are other factors that contribute to an individual's willingness and ability to participate in a given sport or activity. Household income has a direct influence on sports participation due to the fact that sports require different levels of annual investment, some of which may not be feasible for all people. The chart below presents a summary of the average household income of the indoor sports reviewed.

**Exhibit 3
Average Household Income (by Sport)**



Source: SGMA, 2014

As shown, ice hockey participants have the highest average annual household income of approximately \$90,500, followed by gymnastics participants with an average annual household income of \$77,800. Sports with participants that have average annual household income levels higher than or equal to the national average (\$77,000) include ice hockey (\$90,500), gymnastics (\$77,800), and cheerleading (\$77,000), indicating that these sports may report higher participation rates in areas with greater purchasing power.

The following exhibit summarizes the estimated population base participating in each identified sport based on regional participation rates applied to the overall market population. The rate of participation includes only frequent users and does not account for occasional and infrequent users.

**Exhibit 4
Estimated Frequent Participation of Local and Regional Markets**

Estimated Frequent Participants														
Market Population:	Frequent Participation Rates		City of Elmhurst		DuPage County		30-minute Drive Time		90-minute Drive Time		180-minute Drive Time		Illinois CBSA	
			41,308		854,085		2,152,025		7,639,492		15,695,165		11,907,760	
	Nat'l	Reg	Nat'l Rate	Reg Rate	Nat'l Rate	Reg Rate	Nat'l Rate	Reg Rate	Nat'l Rate	Reg Rate	Nat'l Rate	Reg Rate	Nat'l Rate	Reg Rate
Basketball	2.0%	1.9%	819	786	16,924	16,247	42,643	40,937	151,378	145,323	311,002	298,562	235,954	226,516
Cheerleading	0.3%	0.3%	104	117	2,159	2,418	5,440	6,092	19,310	21,627	39,672	44,433	30,099	33,711
Gymnastics	0.5%	0.4%	213	183	4,410	3,792	11,111	9,555	39,443	33,921	81,034	69,689	61,480	52,872
Ice Hockey	0.3%	0.3%	124	128	2,562	2,639	6,456	6,650	22,918	23,606	47,085	48,498	35,723	36,795
Swimming	0.9%	0.8%	383	329	7,915	6,807	19,943	17,151	70,795	60,884	145,447	125,084	110,349	94,900
Volleyball	1.2%	1.4%	480	580	9,916	11,999	24,986	30,233	88,699	107,326	182,231	220,499	138,257	167,290
Wrestling	0.3%	0.3%	126	139	2,610	2,871	6,575	7,233	23,342	25,676	47,955	52,751	36,383	40,022
AVERAGE			321	323	6,642	6,682	16,736	16,836	59,412	59,766	122,061	122,788	92,606	93,158

Note: Population Numbers include ages 7+
Source: SGMA, 2014

Based on SMGA report's sports participation regional index, the city of Elmhurst would have an average of approximately 320 total frequent participants across all sports. Frequent participation based on the adjusted regional rate within a 30-, 90- and 180-minute drive of Elmhurst average 16,800, 59,800 and 122,800, respectively. Basketball, volleyball, swimming, and gymnastics have the most participants based on the regional index and population penetration analysis within the City of Elmhurst, DuPage County and the State of Illinois. This is consistent with the 30-, 90- and 180-minute drive markets as those sports also have the highest number of total participants.



3.0 LOCAL MARKET CONDITIONS

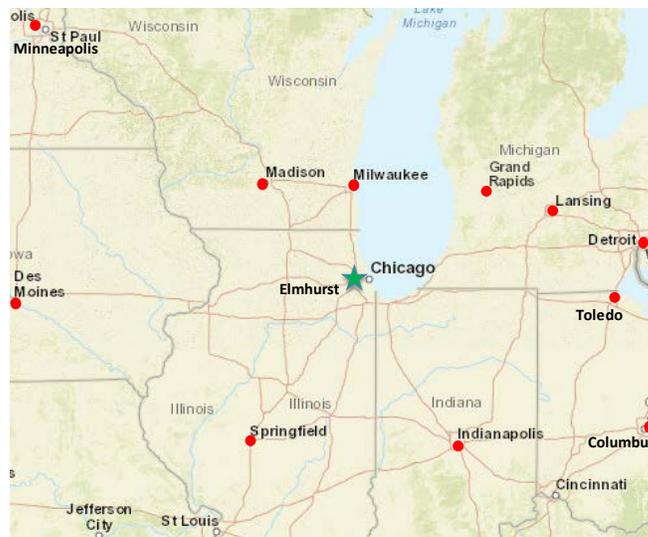
An important component in assessing the potential success of a new Indoor Sports Facility in Elmhurst is the demographic and socioeconomic profile of the local and regional market. The strength of a market in terms of its ability to support and utilize recreational sports facilities is measured, to some extent, by the size of the regional market area population, its age, income, and other characteristics. In addition to the demographic profile of the local and regional market area, other local market characteristics have relevance when considering the attractiveness of a particular community as a host for high quality sports and recreation complexes/facilities. These include items such as transportation accessibility, climate, existing inventory of athletic facilities, and visitor amenities (such as hotels, attractions and other such items).

Background, Location and Accessibility

Elmhurst is a suburban community approximately 20 miles west of downtown Chicago, situated just west of the confluence of Interstate Highways 290, 294 and 88 and approximately 10 miles south of O'Hare International Airport. The community serves both as a bedroom community for the greater Chicago area, but also offers a significant presence in the healthcare (Edward-Elmhurst Health), educational (Elmhurst College, Timothy Christian School, IC Catholic Prep and District 205 schools), industrial and other industries. Its geographic location and affluent community base provide a solid foundation upon which the community has grown and prospered for many years.

Exhibit 1 illustrates the location of Elmhurst and its regional markets, the approximate drive times and the market populations. Additionally, the exhibit demonstrates the markets and land area captured within 30, 90 and 180-minute estimated driving distances. It should be noted that Elmhurst serves as the central point for these driving distances. These rings will also be utilized throughout the report while analyzing and comparing demographic and socioeconomic variables.

**Exhibit 1
Location and Transportation – Driving Distances to Nearby Major Markets**



Source: Google Maps, Esri 2016



Transportation access to and from a potential new Elmhurst Indoor Sports Facility represents a key element of viability. Convenient local access to a potential new sports facility will be important to the local and regional sports participants who will be the primary users of those potential facilities, while regional access characteristics will likely influence the ability of the venue to attract tournaments drawing teams from throughout the Midwest.

Industry research indicates that participants in youth and adult sports tournaments are willing to travel, on average, up to 200 miles to participate in regional tournaments. This puts Elmhurst within tournament draw distance of six population centers for a total of over 14.8 million people. Additionally, large metropolitan areas such as St. Louis and Detroit are located outside of the 200-mile “driving” distance, though well within a day’s drive. These communities represent potential sources of participating teams for regional tournaments, meets or competitions held at a potential new Elmhurst Indoor Sports Facility.

Demographics and Socioeconomic Characteristics

The historical, current and projected demographic and socioeconomic characteristics of the Elmhurst area, the State of Illinois and the surrounding regional area provide an indication of the market’s ability to support a potential new Elmhurst Indoor Sports Facility.

The demographic and socioeconomic data presented in this report is based on the anticipated primary and secondary markets of a potential new Elmhurst Indoor Sports Facility. The primary market is the geographic area from which it is anticipated that the majority of participants and attendees are expected to originate. The size of this primary market area can be influenced by such factors as transportation systems, site accessibility, media coverage and competing venues in the surrounding region. For purposes of this analysis, the area within a 30-minute drive from the city of Elmhurst represents the “primary” market for a potential new Indoor Sports Facility. The area between the 30-minute drive time and the 90-minute drive time effectively represents Elmhurst’s secondary market. In addition to residents of the primary and secondary market areas, a potential Indoor Sports Facility will draw patrons from a larger geographic area for regional and national sports tournaments, including much of the Greater Midwest region.

A variety of industry research suggests that, on average, sports teams and their participants are often willing to travel up to 200 miles to attend tournaments. Therefore, the analyses presented herein also include information regarding the demographics within a 180-minute drive of Elmhurst.

Exhibit 2 presents the historical, current and projected demographic and socioeconomic characteristics of the Elmhurst area, including DuPage County, the primary and secondary markets of a potential new Indoor Sports Facility, a 180-minute drive from the city of Elmhurst, the state of Illinois and the U.S. as a whole.

**Exhibit 2
Demographics Summary - Elmhurst Area**

Demographic Variable	Elmhurst	DuPage County	30-Minute	90-Minute	180-Minute	State of Illinois	U.S.
Population (2000)	43,183	904,054	2,354,891	9,623,519	16,158,962	12,419,293	281,421,906
Population (2010)	44,150	916,924	2,315,081	10,026,216	16,850,220	12,830,632	308,745,538
Population (2016)	45,096	932,000	2,353,484	10,218,185	17,172,651	13,022,485	323,580,626
% Change (2000-2016)	4.4%	3.1%	-0.1%	6.2%	6.3%	4.9%	15.0%
Population (2021 est.)	45,993	949,164	2,383,128	10,363,539	17,438,265	13,163,617	337,326,118
% Change (2016-2021)	2.0%	1.8%	1.3%	1.4%	1.5%	1.1%	4.2%
Avg. Household Inc. (2016)	\$123,859	\$107,728	\$89,280	\$86,404	\$79,107	\$80,916	\$77,008
Avg. Household Inc. (2021 est.)	\$133,422	\$116,321	\$96,291	\$93,348	\$85,863	\$87,198	\$84,021
% Change (2016-2021)	7.7%	8.0%	7.9%	8.0%	8.5%	7.8%	9.1%
Median Age (2016, in years)	41.2	39.0	38.7	36.8	37.3	37.5	38.0
Businesses (2016)	2,529	47,992	101,716	394,286	670,885	517,952	13,207,211
Employees (2016)	29,883	715,593	1,525,708	5,511,436	9,443,721	6,983,490	162,998,347
Employee/Residential Population Ratio	0.66:1	0.77:1	0.65:1	0.54:1	0.55:1	0.54:1	0.50:1

Source: Esri, 2016

The level of population from which facilities will draw participants, both short-term and long-term, will impact the utilization of a potential new Elmhurst Indoor Sports Facility. As shown in Exhibit 2, the market area captured within a 180-minute drive of Elmhurst has experienced a much lower growth in population than the United States total population. This suggests that of the markets analyzed, specifically in Illinois, the market population growth is slower than the national average. Future projections also indicate this trend, as the national growth rate from 2016 to 2021 is more than two percent higher than the projected growth of Elmhurst. However, given the lack of available land and space to grow in the greater Chicagoland metropolitan area, the slowed growth may be expected.

Household income is another important socioeconomic characteristic important to the potential success of a potential new Elmhurst Indoor Sports Facility. Income levels can serve as an indication of area households' ability to support athletics in the region by paying league fees and other costs associated with participation. The affluence of area households can also impact the types of programming that will be most successful at the sports complex, as household income levels often impact the types of sports that are played by a specific populace.

Average household income surrounding the Elmhurst area ranges from a low of \$79,107 in the 180-minute drive range to a high of \$123,859 in Elmhurst. Future projections estimate the DuPage County surrounding region's household incomes to increase by approximately 8.0 percent between 2016 and 2021, just below the nation's average estimate of 9.1 percent. This high level of average household income in the community of Elmhurst is also 40 percent higher than the national average.



As is typical in most communities housing a complex of the nature being considered, the marketplace will likely be sensitive to material increases in youth sports registration fees that may become necessary to support the operations of potential amateur and recreational sports facilities. In developing fee structures for a potential new Elmhurst Indoor Sports Facility, it will be important to identify price points that allow local sports/recreational organizations to afford to use the facilities without pricing-out the participant base through increased participation/registration fees. To potentially mitigate the impact of lower household incomes, it may become important to emphasize the opportunities provided by a sports and recreation facility to youths from underprivileged families. Further, it may be beneficial to consider scholarship and other financial assistance programs to maximize utilization of the facility.

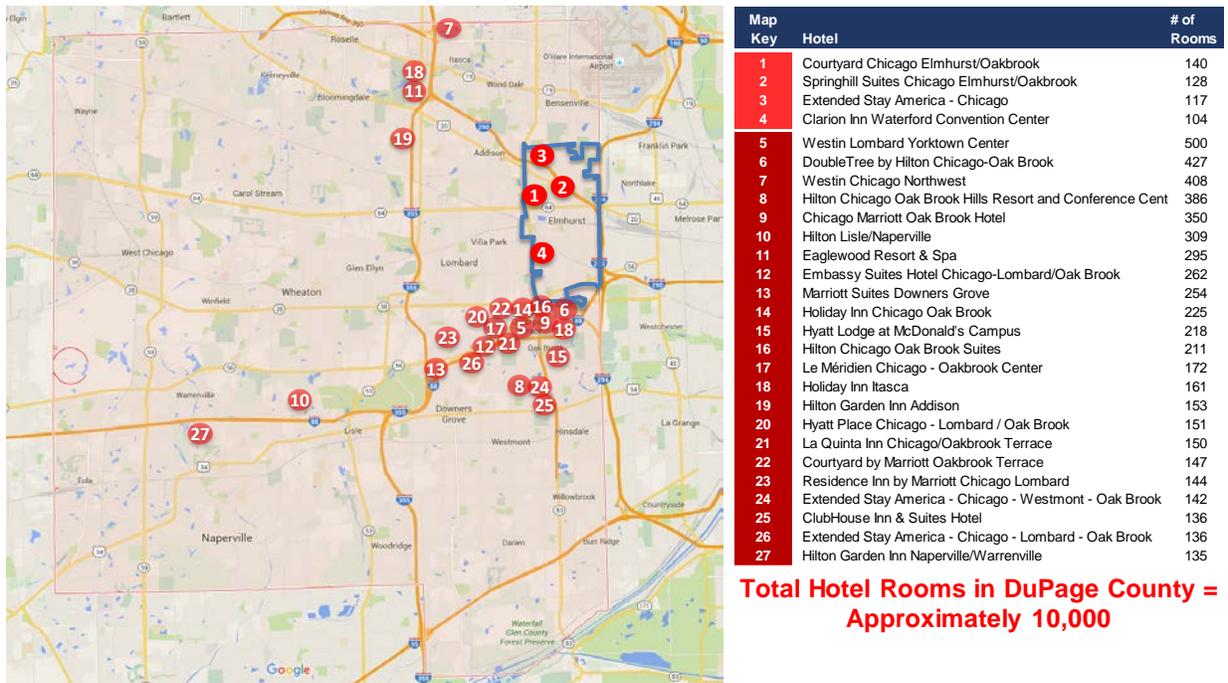
The regional corporate market base could play an important role in the success of a potential new Elmhurst Indoor Sports Facility. Within DuPage County, there are nearly 48,000 businesses, while the city of Elmhurst's 2,500 businesses account for only five percent of this inventory. However, within a three-hour drive there are nearly 671,000 businesses. Corporate sponsorships and donations are potential methods of financing and funding potential new indoor sports facilities that could greatly assist the development of a new facility in Elmhurst.

The majority of corporate sponsorship opportunities at a potential new Elmhurst Indoor Sports Facility will likely be in the form of sponsorships, banners, scoreboard advertising and other such opportunities; many of which would be relatively inexpensive. As a result, it is likely that a significant portion of these companies would have the wherewithal to participate in advertising and sponsorship opportunities at the potential sports facility.

Hotel Inventory

To drive new visitation and economic impact to the Elmhurst destination, it is important to evaluate the ability of the local market to provide an adequate number of hotels that are convenient to a potential new indoor sports facility site. It is also a key consideration for sports organizations when choosing tournament or meet sites. Exhibit 3 presents a map of the primary lodging facilities in Elmhurst and DuPage County, offering a minimum of 130 guestrooms per facility.

**Exhibit 3
Primary DuPage County Hotels**



Source: DuPage County CVB Hotel Inventory

As displayed, DuPage County has nearly 30 hotel properties with at least 130 guestrooms each. There are nearly 500 total sleeping rooms in the City of Elmhurst, with the largest single property in being the Courtyard Chicago Elmhurst/Oakbrook with 140 hotel rooms. Expanding throughout DuPage County, the Westin Lombard Yorktown Center is the largest single property with 500 rooms. Many of the hotels in the area are considered full-service hotels. These are the types of properties best suited for accommodating participant and family members that may travel to the county for regional and national tournaments at potential new amateur and recreational sports facilities.

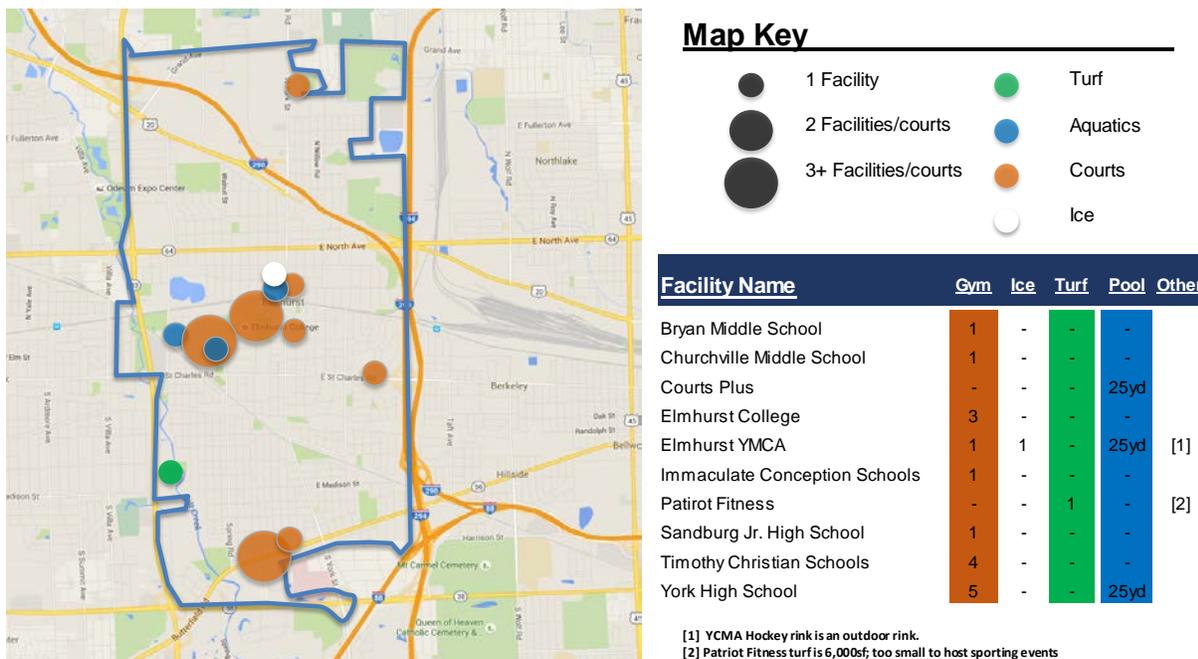
As shown, clusters of hotel properties exist in and near the south end of Elmhurst and along Interstate 88. While certain public assembly facilities such as convention centers greatly benefit from having an attached or adjacent "headquarters hotel" (typically of a full-service nature), sports and recreation facilities generally do not require a single property within very close proximity to enhance its marketability for non-local events as participants are generally willing to drive 15 to 20 minutes to the host facility. The overall market inventory of nearly 10,000 guest rooms is likely to be adequate for the size of tournaments and events that could be accommodated by a potential Indoor Sports Facility in Elmhurst.

Elmhurst Athletic Facilities

An understanding of the inventory and quality of existing athletic indoor facilities in Elmhurst is critical in identifying potential areas of local and non-local need that may be met by a potential new indoor sports facility. New potential facilities can maximize utilization and become a more valued community asset if they can provide sports and recreation facilities and other programming in areas that may currently be lacking in the Elmhurst area.

Exhibit 4 below contains an inventory of Elmhurst facilities as well as a map that illustrates their location within the city of Elmhurst. The facilities included in the lists below were identified by local leadership as being game ready and community accessible, and are able to be used for both adult and youth athletic practices and/or games. Further, many of the facilities are associated with schools that have limited availability for public use. The number of fields or courts at each location has been accounted for by the size of placement markers.

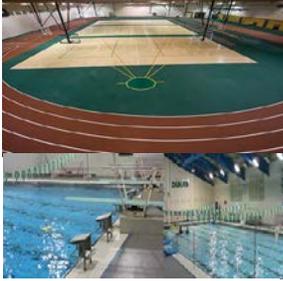
Exhibit 4
Inventory and Location of Elmhurst Amateur Sports Facilities



As shown, the majority of existing facilities are located near downtown Elmhurst. York High School has five total basketball courts as well as a 25-yard pool. However, it is important to note that these facilities are often in use by school-related programming and while they are made available for rent, available time slots tend to be less appealing times and can be cancelled with little notice.

A potential new Indoor Sports Facility within an area that offers a critical mass of courts and/or multipurpose space for a particular sport would likely make the Elmhurst area a more marketable tournament destination, as the potential facility could serve as the central tournament location, rather than spreading games across a number of small court facilities. In regards to indoor sports, the city lacks an independent facility with more than two courts other than Elmhurst College, Timothy Christian, and York High School. However, these facilities are typically unavailable and alternative facilities are not present. There is no true indoor turf facility in Elmhurst. Patriot Fitness has a small, multi-purpose turf room of approximately 6,000 square

feet, which can accommodate some practices, clinics and camps but is not large enough to accommodate any type of typical indoor gameplay. Courts Plus, York High School and the Elmhurst YMCA provide for three of the city's available 25-yard pool aquatic facilities.

	<p>YORK HIGH SCHOOL</p> <p>Owner: School District 205 Operator: School District 205</p> <p>Facilities:</p> <ul style="list-style-type: none"> - Five full Basketball courts - 25 yard, 6-lane indoor pool - Indoor Track 		<p>COURTS PLUS</p> <p>Owner: Elmhurst Parks District Operator: Elmhurst Parks District</p> <p>Facilities:</p> <ul style="list-style-type: none"> - 25 yard, 5-lane indoor pool - Fitness Center - 1/9th mile indoor track - Indoor Tennis Courts
	<p>ELMHURST YMCA</p> <p>Owner: YMCA of Metro Chicago Operator: Elmhurst YMCA</p> <p>Facilities:</p> <ul style="list-style-type: none"> - 25 yard, 4-lane indoor pool - One full Basketball court - Outdoor Hockey Rink 		<p>TIMOTHY CHRISTIAN SCHOOLS</p> <p>Owner: Private</p> <p>Facilities:</p> <ul style="list-style-type: none"> 4 Basketball Courts
	<p>ELMHURST COLLEGE</p> <p>Owner: Elmhurst College Operator: Elmhurst College</p> <p>Facilities:</p> <ul style="list-style-type: none"> 3 Basketball Courts 		

Conclusions

The strength of a market in terms of its ability to support and utilize sports and recreation facilities is measured, in part, by the size of the local and regional market area population and its age, income and other characteristics. Other local market characteristics have relevance when considering the attractiveness of a particular community as a host for major amateur sports facilities, including transportation accessibility, climate, existing local inventory of athletic facilities, and visitor amenities.

In addition to the demographic and socioeconomic characteristics of the local and regional market, transportation access to and from a potential new Elmhurst Indoor Sports Facility represents a key element of the viability of any potential facility. Convenient local access to any potential new facility will be paramount to the local and regional sports participants who will represent the majority of users of a potential new facility, while regional access characteristics will likely influence the ability of the venue to attract tournaments drawing teams from throughout Illinois, the Midwest and beyond. Industry research indicates that participants in youth and adult sports tournaments are willing to travel, on average, up to three hours to participate in regional tournaments. The population within a 180-minute drive time of Elmhurst is nearly 17.2 million, providing a significant population base from which the proposed facility could draw tournament participants. Additionally, large metropolitan areas such as Milwaukee, Indianapolis, St. Louis, Minneapolis and Detroit are located just outside of the 180-minute "driving" distance, though well within a day's drive. Further, Elmhurst's proximity to O'Hare International Airport opens access to markets throughout the country and the world. These communities represent potential sources of teams for regional and national tournaments, meets or competitions held at a potential new Elmhurst Indoor Sports Facility.

While a number of sports and recreation facilities, pools and fields exist throughout Elmhurst, the area is lacking a significant concentration of such facilities in a single location. Many communities have seen that developing new sports facilities benefits the local sports market by consolidating activities and facilities at one single site, and such developments have assisted in recreational activity participation growth in a given area. While York High School and Timothy Christian Schools offer five and four indoor courts, respectively, the greatest single concentration of courts is the three available at York's fieldhouse. Additionally, while there are three 25-yard pools in Elmhurst, pools at Courts Plus and the YMCA are somewhat limited by the membership-driven operations of their venues. Further, while elementary, middle and high schools accommodate a significant amount of indoor gym-space and swimming pool demand, shrinking school budgets and booking priorities that reserve gym and pool space for school-related functions first, reliable access to these venues is becoming increasingly sparse.

With respect to ice rink and indoor turf facilities, the facilities available are not capable of hosting regular league play. Collectively, these facilities were originally envisioned to accommodate local demand, and have thus far accomplished that goal. However, with the continued growth of the Elmhurst market, the existing local facilities are increasingly limited in their ability to accommodate existing local demand.

Moreover, any envisioned indoor Elmhurst sports facility designed with appropriate quality and volume standards would allow the area to be a more marketable tournament/competition destination—in terms of offering a quality indoor competition gymnasium with a critical mass of courts would serve as the central tournament location, rather than spreading games across a number of limited court facilities (which tends to be much less desirable, particularly for major traveling tournaments).

Non-local participating teams at any potential Indoor Sports Facility would have a positive impact on the Elmhurst economy by supporting area hotels, restaurants and other establishments during their visit to the area. Economic impact generated by non-local participants and their families is typically a critical reason for the consideration of public investment in these types of larger sports and recreational facilities. Offering an appropriate number of facilities to attract a critical mass of non-local tournament, meet or competition participants is an important factor in generating this economic impact. However, the ability of the local market to provide an adequate number of hotels that are within reasonable driving distance from the potential facilities is also a key element for ensuring that the economic benefit created by hosting amateur sports events is maximized within the local community and a key consideration for sports organizations selecting potential tournament, meet or competition destinations.

The overall area hotel room inventory (nearly 500 rooms in Elmhurst and 10,000 throughout DuPage County) is believed to be sufficient for the types of tournaments that could be accommodated by a potential new Elmhurst Indoor Sports Facility, while still accommodating business and other leisure travelers. Participants and family members traveling to attend tournaments, meets and competitions at indoor sports facilities tend to prefer more affordable, limited service hotel properties. The existing hotel inventory in Elmhurst and DuPage County is of a sufficient level and diversity of products/price points to support potential new indoor sports facility development.

Non-local tournament, meet and competition organizers and participants can focus, in part, on the appeal of a destination when making a decision on whether to attend. The variety and number of attractions available throughout Elmhurst and the greater-Chicago metropolitan area may serve as a foundation on which to increase the economic benefits associated with increased non-local attendance at tournaments, meets and competitions held at a potential new Elmhurst Indoor Sports Facility. Overall, the Elmhurst area's array of attractions and general destination appeal is considered to be relatively strong for a community its size, with the destination's greatest strengths lying in its accessibility, affordability and strong local demographic and socioeconomic base.

4.0 COMPETITIVE AND COMPARABLE FACILITIES

This chapter provides an analysis of various physical characteristics and resources of both competitive and comparable facilities and communities. The data helps place a potential new Elmhurst Indoor Sports Facility within a competitive and comparable market context with respect to facility offerings, demographics and other related destination features. A set of competitive facilities throughout the state and region as well as comparable facilities throughout the country were identified and analyzed to obtain insight into the physical and operational characteristics of facilities located in competitive and comparable communities.

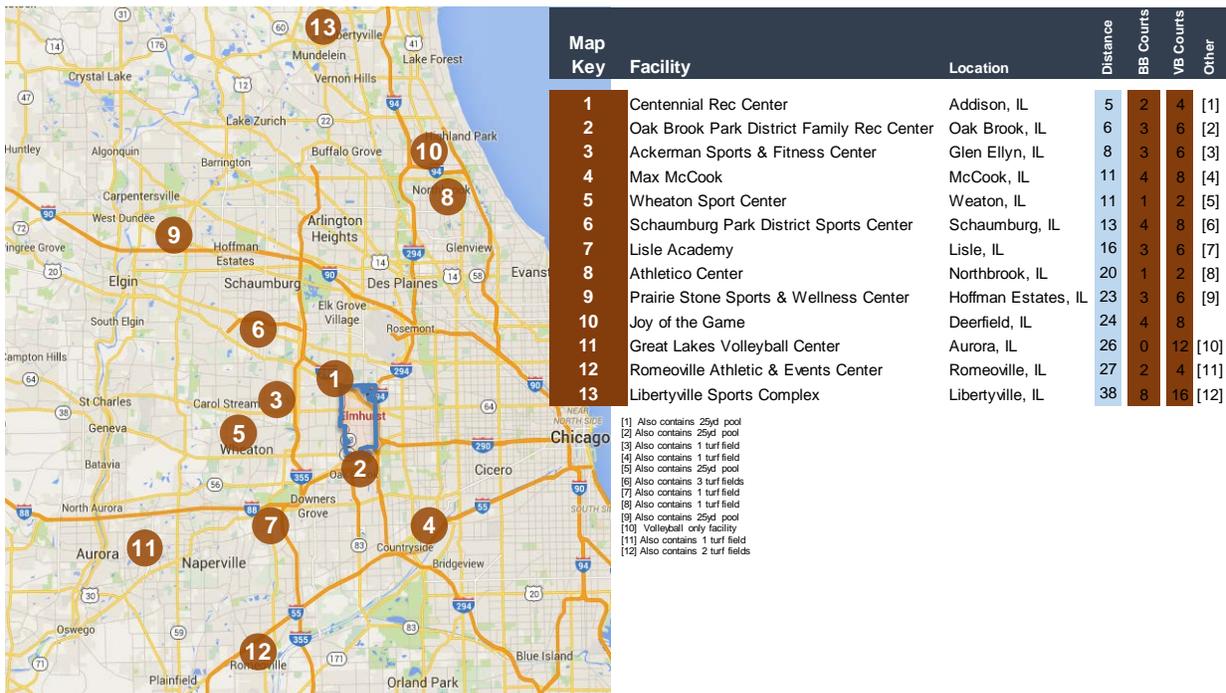
Competitive Facilities

In addition to the existing facilities located in Elmhurst, facilities located throughout the state and surrounding region were also reviewed as these facilities are likely to generate the most competition with a potential new Elmhurst Indoor Sports Facility. Several of these facilities have been mentioned by local sports organizations and stakeholders as principal sports complexes in the area. This section is divided into four parts illustrating each type of indoor sports facility: gym space, indoor turf space, aquatics, and ice arenas.

Competitive Gymnasium Facilities

Exhibit 1 below outlines the identified major competitive gymnasium facilities, their respective location and distance in miles from the Elmhurst.

Exhibit 1
Competitive Gymnasium Facilities



Note: Facilities sorted by distance from Elmhurst.



As shown in the previous exhibit, there are 13 facilities within approximately 40 miles of Elmhurst that may offer some type of competition to a potential Indoor Sports Facility in Elmhurst.

Among the 13 identified competitive gymnasium facilities, the largest facility is the Libertyville Sports Complex with an inventoried eight basketball courts and the possibility to have 16 volleyball courts. Many of the facilities contain other multipurpose areas that are used for activities other than basketball, volleyball and other indoor recreational activities. Selected competitive gymnasium facilities are further analyzed below.

**Exhibit 2
Competitive Gymnasium Facilities**

	Max McCook Athletic & Exposition	Libertyville Sports Complex	Oak Brook Family Recreation Center
City, State	McCook, Illinois	Libertyville, Illinois	Oak Brook, Illinois
Year Opened	2006	2002	N/A
Owner/Operator	Village of McCook	Libertyville Park District	Oak Brook Park District
Square Feet	150,000 sf	169,000 sf	78,000 sf
Court Inventory	<ul style="list-style-type: none"> • 4 basketball courts • 80,000 sf turf 	<ul style="list-style-type: none"> • 8 full-sized basketball courts • 4 indoor soccer fields 	<ul style="list-style-type: none"> • 3 full-sized basketball courts
Competitive Advantage	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Strong presence in market • Larger than average contiguous turf space 	<ul style="list-style-type: none"> • Strong market presence • Multiple amenities to cater to various user groups 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Strong local support

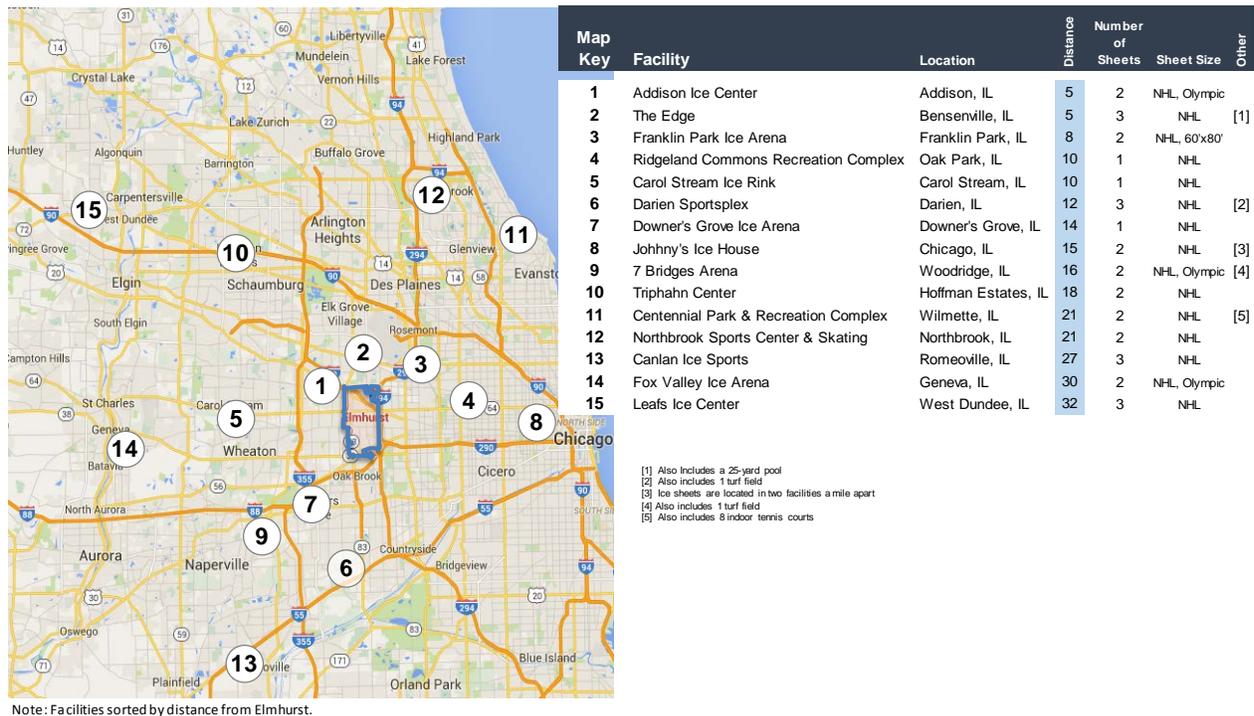
While Max McCook Athletic and Exposition and the Oak Brook Family Recreation Center both provide nearby alternatives for Elmhurst, the total number of courts available is somewhat limiting when looking to attract larger and non-local tournament activity. The Libertyville Sports Complex is currently the only dedicated sports venue that can accommodate more than four concurrent basketball courts.



Competitive Ice Arena Facilities

The exhibit below illustrates the location of the competitive ice arenas and proximity, in miles, to the Elmhurst market.

**Exhibit 3
Competitive Ice Arenas**



As shown, there are 15 facilities within approximately 40 miles of Elmhurst that may offer some type of competition to a potential new Elmhurst Indoor Sports Facility with an ice focus. Among the identified competitive ice arenas, Addison Ice Center, the Edge Ice Arena in Bensenville and Franklin Park Ice Arena are those most often utilized among Elmhurst residents. As shown, most facilities offer at least two rinks, with only three venues offering a single sheet. Additional information on select competitive venues is presented on the following page.

**Exhibit 4
Competitive Ice Arena Facilities**

	The Edge	Seven Bridges Ice Arena	Franklin Park Ice Arena
City, State	Bensenville, Illinois	Woodridge, Illinois	Franklin Park, Illinois
Year Opened	1997	N/A	1974
Owner/ Operator	Village of Bensenville	Private	City of Franklin Park
Ice Sheet Inventory	<ul style="list-style-type: none"> • 3 NHL sized ice sheets, seating for 2,500 spectators 	<ul style="list-style-type: none"> • 2 NHL sized ice sheets • Indoor turf field 	<ul style="list-style-type: none"> • One NHL sized ice sheet
Facility Usage	<ul style="list-style-type: none"> • Hosts approximately 15-20 non-local hockey tournaments yearly 	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • N/A
Competitive Advantage	<ul style="list-style-type: none"> • Extremely competitive, strong market presence • Close proximity to Elmhurst 	<ul style="list-style-type: none"> • Comparable city market to Elmhurst • New facility, strong management 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Strong local market presence

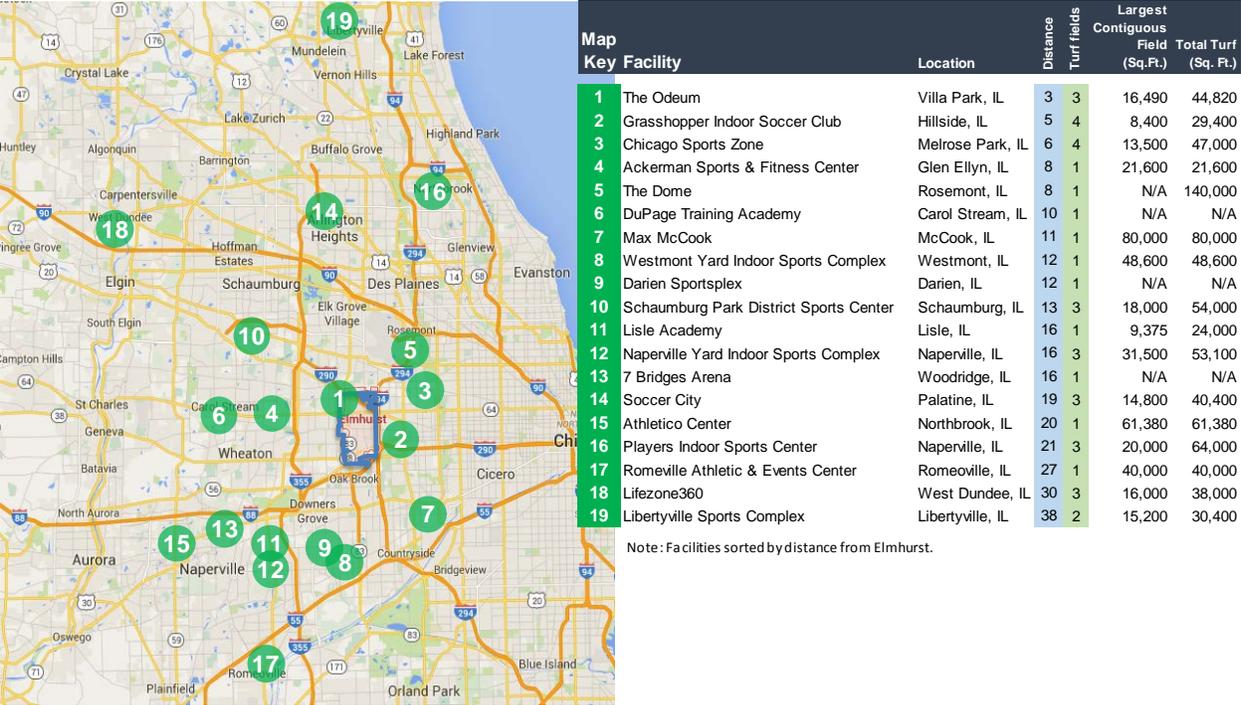
The Edge in Bensenville regularly hosts tournament activity within its three-rink complex, while a facility such as the Franklin Park Ice Arena is more suited to accommodating local demand. The Seven Bridges Ice Arena presents an example of a multi-use ice complex, as it also offers indoor turf for training and more diverse facility offerings to accommodate a wider array of user groups.



Competitive Indoor Turf Facilities

Exhibit 5 below outlines the identified primary competitive indoor turf facilities, their respective location and distance in miles from the Elmhurst.

**Exhibit 5
Competitive Indoor Turf Facilities**



As shown, there are 19 facilities within 40 miles of Elmhurst that may offer some level of competition for a potential indoor turf facility in Elmhurst. When examining indoor turf facilities, it is important to note the largest contiguous field and total amount of turf availability, rather than the total amount of fields offered. A larger contiguous field may be divided up into multiple components to allow for maximum utilization and multiple user groups to engage in activities at a concurrent time.

Among the identified competitive indoor turf facilities, Max McCook Recreation and Exposition in McCook, Illinois has the largest contiguous space, as well as the most total space of indoor turf at 80,000 square feet, while the Grasshopper Indoor Soccer club has the largest quantity of individual fields, but a lower amount of total square footage of turf and the smallest contiguous turf field.



Below selected competitive facilities have been further analyzed and summarized based on competitiveness with a potential new Elmhurst Indoor Sports Facility.

**Exhibit 6
Selected Competitive Indoor Turf Facilities**

	Grasshopper Indoor Soccer Club	Westmont Yard Indoor Sports Complex	Max McCook Recreation & Exposition	Lifeyzone 360	The Odeum
City, State	Hillside, Illinois	Downer's Grove, Illinois	McCook, Illinois	West Dundee, Illinois	Villa Park, Illinois
Owner/Operator	Private	Private	Village of McCook	Private	Private
Square Feet	80,000 sf	48,600 sf	150,000 sf	125,000 sf	130,000 sf
Turf Inventory	<ul style="list-style-type: none"> • 4 indoor turf fields, • (2) at 8,400 sf • (2) at 6,300 sf 	<ul style="list-style-type: none"> • 48,600 sf turf, typically broken up into 3 fields 	<ul style="list-style-type: none"> • 80,000 sf contiguous turf field • 25,000 sf hardcourt space 	<ul style="list-style-type: none"> • 38,000 sf total turf • (2) fields 16,000 sf • (1) field 6,000 sf • (2) futsal courts 	<ul style="list-style-type: none"> • 44,820 sf total turf • (2) fields 16,490 sf • (1) field 11,840 sf
Competitive Advantage	<ul style="list-style-type: none"> • Close proximity to Elmhurst 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • High quality facility • Strong market presence 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • High quality facility • Strong market presence 	<ul style="list-style-type: none"> • Comparable and competitive market with Elmhurst • New, high quality facility, opened 2016 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Versatile facility with potential to host multiple types of events

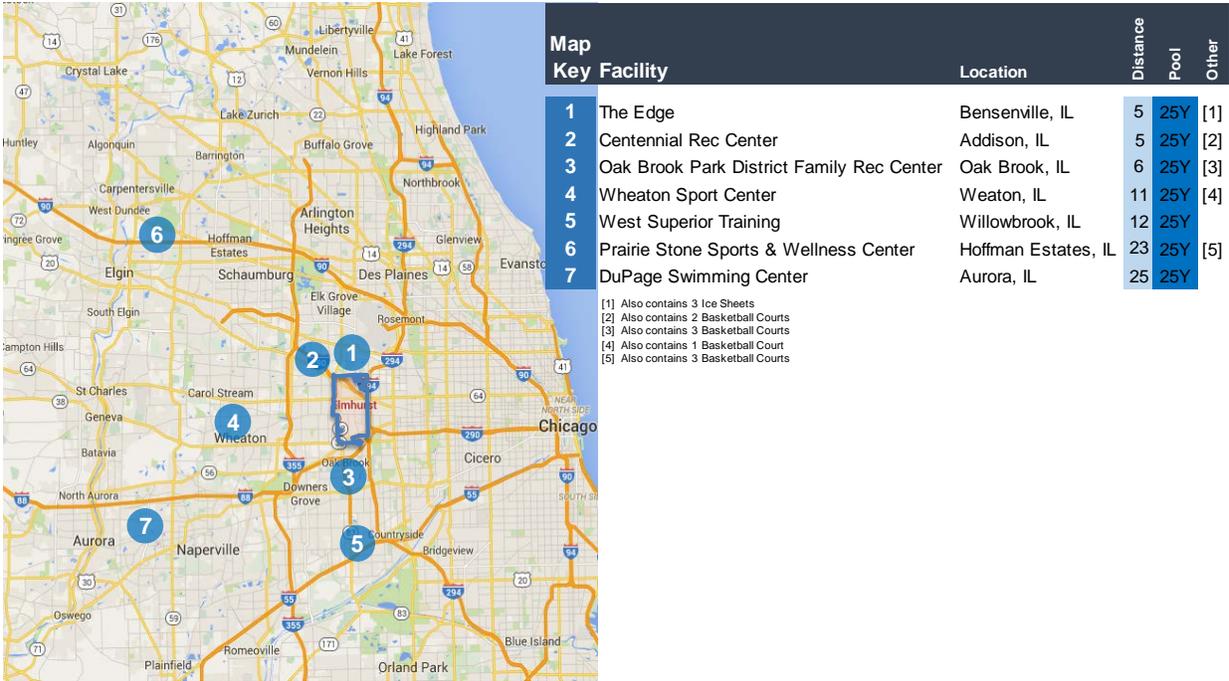
Selected competitive facilities were based upon proximity to Elmhurst, market presence, and facility amenities. The Grasshopper Indoor Soccer Complex is regularly used by indoor soccer users from Elmhurst and provides a regularly available indoor turf facility at a very close driving distance. Max McCook Recreation and Exposition is one of the largest facilities in the area and has the most available contiguous turf field, affording it an opportunity to host large tournaments. The Westmont Yard has a strong market presence, and sees heavy usage during the fall and winter months. While Lifeyzone 360 is in its first year of operations, it is in close proximity to Elmhurst with multiple fields making it a competitor with any potential new Elmhurst Indoor Sports Facility that has a turf element.



Competitive Aquatic Facilities

Exhibit 7 below outlines the identified major competitive aquatic facilities, their respective location and distance from the Elmhurst.

**Exhibit 7
Competitive Aquatic Facilities**



Note: Facilities sorted by distance from Elmhurst.

As shown above, there are seven facilities within approximately 40 miles of Elmhurst identified as likely to offer some measure of competition with a potential new indoor pool/natorium in Elmhurst. While three of the facilities are within less than five miles of the Elmhurst border, none offer a 50-meter pool, which is increasingly becoming a requirement among the most highly competitive state, regional, and national competitions.

Importantly, there is a proposal in Westmont, Illinois to develop an indoor natatorium with two pools (one 50-meter pool and a second leisure/warm-up pool) and seating for 1,200 people. If completed, this facility is expected to provide significant level of competition to any indoor pool/natorium facility in Elmhurst. Presently, the Westmont natatorium is a component of a larger mixed-use plan that continues to advance through public and private approval and planning steps.



In the exhibit below, selected competitive aquatic facilities are further analyzed to determine competitiveness with a potential new Elmhurst Indoor Sports Facility.

**Exhibit 8
Selected Competitive Aquatic Facilities**

	Oak Brook Family Recreation Pool	Centennial Rec Center	Wheaton Sport Center
City, State	Oak Brook, Illinois	Addison, Illinois	Wheaton, Illinois
Distance from Elmhurst	5 miles	5 miles	11 miles
Owner	Oak Brook Park District	City of Addison	Private
Operator	Oak Brook Park District	Addison Park District	Private
Pool Inventory	<ul style="list-style-type: none"> • 25-yard pool 	<ul style="list-style-type: none"> • 25-yard, 6 lane pool 	<ul style="list-style-type: none"> • 25-yard, 6 lane pool
Other Facility Amenities	<ul style="list-style-type: none"> • Two indoor basketball courts 	<ul style="list-style-type: none"> • Fitness center • Two indoor basketball courts 	<ul style="list-style-type: none"> • Fitness center • One indoor basketball court
Competitive Advantage	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Strong local support • Established market presence 	<ul style="list-style-type: none"> • Close proximity to Elmhurst • Established market presence 	<ul style="list-style-type: none"> • Operated and financed by private memberships, can incentivize users.

As discussed, area pool facilities only offer 25-yard pools, which is similar to the existing pool at York High School and well suited to accommodating local needs, but typically is not as attractive as a 50-meter competition pool.



Comparable Facilities

The purpose of this section is to present an analysis related to comparable sports complexes around the country. An assessment of the physical and operational characteristics of comparable sports facilities is a critical component in assessing the market potential of a new Indoor Sports Facility in Elmhurst. Comparable facilities were identified based on discussions with project representatives, sports tournament organizers and our knowledge of the industry. The analysis of similar sports facilities provides general informational background and a programmatic perspective from which to assess potential event activity at a potential new Elmhurst Indoor Sports Facility. Our analysis is broken down by facility type and includes facilities with gym space, indoor turf, ice sheets, and indoor aquatic facilities.

Additional comparable facility information, including case studies, is provided in Appendix A at the conclusion of this report.

Comparable Gymnasium Facilities

We have identified 13 comparable facilities throughout the country that offer basketball and/or volleyball court space. Exhibit 9 summarizes the comparable facilities and markets evaluated.

**Exhibit 9
Summary of Comparable Gymnasium Facilities**

Facility	Location	ST	Sq. Ft.	BB Courts	VB Courts
Fieldhouse USA	Frisco	TX	145,000	12	24
Incrediplex	Indianapolis	IN	175,000	9	18
Pleasant Prairie Rec Plex	Pleasant Prairie	WI	302,000	9	18
UW Health Sports Factory	Rockford	IL	108,000	8	16
Greensboro Sportsplex	Greensboro	NC	106,000	8	16
Sports Pavilion Lawrence	Lawrence	KS	181,000	8	16
Myrtle Beach Sports Center	Myrtle Beach	SC	N/A	8	16
Howard M. Terpenning Recreation Complex	Beaverton	OR	N/A	6	12
Willamalane Center	Springfield	OR	97,000	6	12
Round Rock Sports Center	Round Rock	TX	82,800	6	12
Max McCook	McCook	IL	150,000	4	8
St. Peters Rec-Flex	St. Peters	MO	N/A	4	8
Cool Springs Sports Complex	Pittsburgh	PA	169,000	4	8

Notes: Facilities sorted by largest amount of total court space.
Source: facility floor plans, management, and industry publications, 2016

As shown, seven of the 13 comparable gymnasium facilities contain at least eight or more basketball courts (16 or more volleyball courts). Additionally, nearly all of the selected comparable facilities are multi-sport, offering indoor turf fields, other multipurpose court space or other sport facilities as well.



Exhibit 10 presents Elmhurst's rank among identified comparable markets offering indoor court space in terms of population, average household income, median age, and overall corporate base. Demographic data was collected for a 30-, 90- and 180-minute drive from the respective facilities. Elmhurst's information is included as a means of comparing current local market conditions to the low, high, average, and median population, average household income, median age and corporate base statistics of the markets offering comparable facilities.

Exhibit 10
Comparable Gymnasium Facility Demographic Summary

	Comparable Markets				Elmhurst, IL		
	Low	High	Average	Median	Estimate	% of Avg. (out of 14)	Rank
Population							
30-Minute Drive	234,900	2,383,400	906,900	787,300	2,353,500	260%	2
90-Minute Drive	701,300	10,218,200	4,227,700	3,108,100	10,218,200	242%	1
180-Minute Drive	4,116,300	17,603,400	10,482,500	10,336,100	17,172,700	164%	2
Average Household Income							
30-Minute Drive	\$61,500	\$107,200	\$75,700	\$70,700	\$89,300	118%	2
90-Minute Drive	\$56,000	\$87,500	\$75,400	\$75,000	\$86,400	115%	3
180-Minute Drive	\$60,700	\$81,000	\$72,400	\$73,200	\$79,100	109%	4
Median Age							
30-Minute Drive	33.2	43.4	37.2	37.2	38.7	104%	4
90-Minute Drive	34.0	43.4	37.9	37.6	36.8	97%	10
180-Minute Drive	34.2	42.1	37.8	37.4	37.3	99%	10
Corporate Base							
30-Minute Drive	10,200	105,500	39,900	36,600	101,700	255%	2
90-Minute Drive	34,100	394,300	167,600	128,000	394,300	235%	1
180-Minute Drive	170,900	684,700	407,200	397,700	670,900	165%	2

As shown, the Elmhurst market ranks near the top among the identified comparable markets offering indoor basketball/volleyball court space in terms of population base, average household income and corporate base within 30, 90 and 180-minute driving distances. While these demographic and socioeconomic comparisons can provide important context in terms of potential market reach and an idea of supportable program from a local perspective.



Exhibit 11 presents a summary comparison of selected indoor court facilities, highlighting key physical and operational characteristics and performance highlights.

Exhibit 11
Selected Comparable Indoor Court Facility Comparison

	Sports Pavilion Lawrence	Greensboro Sportsplex	Fieldhouse USA	UW Health Sports Factory
City, State	Lawrence, KS	Greensboro, NC	Frisco, Texas	Rockford, Illinois
Year Opened	2014	2002	2009	2016
Owner	City of Lawrence	Greensboro Parks and Recreation Department	City of Frisco	City of Rockford
Operator	City of Lawrence	Greensboro Parks and Recreation Department	Sports Village Holdings, LLC	Rockford Park District
Construction Cost	\$24.5 million	\$6.0 million	\$17.5 million	\$24.4 million
Funding for Construction	<ul style="list-style-type: none"> • \$22.5 million from City of Lawrence • \$2.0 million from private foundation 	<ul style="list-style-type: none"> • General obligation bonds supported by property taxes 	<ul style="list-style-type: none"> • \$12.5 million funded by the City of Frisco • \$5 million donated from Sports Village Holdings, LLC. 	<ul style="list-style-type: none"> • N/A
Square Feet	181,000 sf	106,000 sf	145,000 sf	108,000 sf
Court Inventory	<ul style="list-style-type: none"> • 8 regulation-sized basketball courts/16 volleyball courts 	<ul style="list-style-type: none"> • 8 full-sized basketball courts • 4 indoor soccer fields 	<ul style="list-style-type: none"> • 12 full-sized basketball courts 	<ul style="list-style-type: none"> • 8 full-sized basketball courts, 12 volleyball courts
Operating Profit/Loss	\$300,500 in operational revenue	(\$150,000)	N/A	\$14,400 (Budget)
Facility Usage	In 2014: <ul style="list-style-type: none"> • 16 basketball tournaments • 6 basketball camps • 13 volleyball tournaments • One futsal tournament 	<ul style="list-style-type: none"> • Average of 45 basketball tournaments per year • 12 to 15 volleyball tournaments per year 	<ul style="list-style-type: none"> • 5 annual volleyball tournaments with averaging 100 teams • 25 annual basketball tournaments averaging 80 teams 	<ul style="list-style-type: none"> • Estimated annual attendance of 504,830
Learning Points	<ul style="list-style-type: none"> • College/city partnership • Integration with University/high school facilities 	<ul style="list-style-type: none"> • Comparable city market to Elmhurst 	<ul style="list-style-type: none"> • Public/Private partnership 	<ul style="list-style-type: none"> • Comparable and competitive market with Elmhurst • Partner with UW-Health Systems



Comparable Indoor Turf Facilities

We have identified nine indoor turf field facilities throughout the country that are, in some way comparable to Elmhurst. Exhibit 12 below summarizes the facilities and their respective offerings.

**Exhibit 12
Summary of Indoor Turf Field Facilities**

Facility	City	Sq. Ft.	Number of Turf Fields	Largest Contiguous Field	Total Turf Sq.Ft.
Braemar Field & Arena	Edina, MN	N/A	1	100,000	100,000
Max McCook	McCook, IL	150,000	1	80,000	80,000
Fieldhouse USA	Frisco, TX	145,000	1	31,500	31,500
Sports Pavilion Lawrence	Lawrence, KS	181,000	1	19,000	19,000
Lifezone360	West Dundee, IL	125,000	3	16,000	38,000
Incrediplex	Indianapolis, IN	175,000	7	13,500	59,200
Aviator Sports & Events	Brooklyn, NY	175,000	1	10,000	10,000
Greensboro Sportsplex	Greensboro, NC	106,000	4	5,100	16,800
Cool Springs Sports Complex	Pittsburgh, PA	169,000	3	N/A	N/A

As presented in the above exhibit, nine comparable facilities with some aspect of indoor turf were identified, seven of which have at least 10,000 square feet of contiguous space. It is interesting to note, that the footprint of all but one of these facilities is over 100,000 square feet, with Braemar Field and Arena as the only exception, as this facility is an inflatable dome that is only utilized during the winter months. Each of the facilities also offers some other element of indoor sports, as the multi-purpose turf can be used in conjunction with other sporting events with aid of sportcourt, hardcourt, and other various portable equipment.



Exhibit 13 summarizes the populations, average household incomes, median age and corporate bases among the 10 comparable markets relative to the demographic metrics of Elmhurst.

Exhibit 13
Comparable Indoor Turf Field Facility Demographic Summary

	Comparable Markets				Elmhurst, IL		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 10)
Population							
30-Minute Drive	241,600	3,797,400	1,526,400	1,203,100	2,353,500	154%	3
90-Minute Drive	2,742,300	19,099,500	3,371,400	4,515,900	10,218,200	303%	2
180-Minute Drive	4,829,600	33,330,500	4,829,600	11,932,700	17,172,700	356%	3
Average Household Income							
30-Minute Drive	\$64,600	107,200	\$81,900	\$77,000	\$89,300	109%	4
90-Minute Drive	\$67,700	101,500	\$81,300	\$84,600	\$86,400	106%	5
180-Minute Drive	\$64,700	95,600	\$75,700	\$77,900	\$79,100	104%	4
Median Age							
30-Minute Drive	33.2	41	36.6	36.8	38.7	106%	2
90-Minute Drive	34.5	43	37.5	36.9	36.8	98%	6
180-Minute Drive	35.4	42	38.1	37.9	37.3	98%	7
Corporate Base							
30-Minute Drive	10,200	103,200	58,900	45,900	101,700	173%	2
90-Minute Drive	108,200	822,000	284,800	175,900	394,300	138%	2
180-Minute Drive	199,900	1,407,700	554,600	451,400	670,900	121%	3

Source: Esri, 2016

Similar to the demographic and socioeconomic comparison of indoor court facilities, Elmhurst ranks favorably among markets offering comparable indoor turf facilities. Elmhurst's population within 30, 90 and 180 minutes ranks second or third among markets reviewed, while average household income ranks fourth or fifth overall.



The following case studies summarize key physical and operational characteristics of select indoor turf facilities in markets comparable to Elmhurst.

**Exhibit 14
Selected Comparable Indoor Turf Field Facility Comparison**

	Sports Pavilion Lawrence	Greensboro Sportsplex	Fieldhouse USA
City, State	Lawrence, KS	Greensboro, NC	Frisco, Texas
Year Opened	2014	2002	2009
Owner	City of Lawrence	Greensboro Parks and Recreation Department	City of Frisco
Operator	City of Lawrence	Greensboro Parks and Recreation Department	Sports Village Holdings, LLC
Construction Cost	\$24.5 million	\$6.0 million	\$17.5 million
Funding for Construction	<ul style="list-style-type: none"> • \$22.5 million from City of Lawrence • \$2.0 million from private foundation 	<ul style="list-style-type: none"> • General obligation bonds supported by property taxes 	<ul style="list-style-type: none"> • \$12.5 million funded by the City of Frisco • \$5 million donated from Sports Village Holdings, LLC.
Square Feet	181,000 sf	106,000 sf	145,000 sf
Indoor Turf Inventory	<ul style="list-style-type: none"> • One 19,000 sf indoor turf 	<ul style="list-style-type: none"> • Largest contiguous field is 5,100 sf • 4 indoor soccer fields (16,800sf total) 	<ul style="list-style-type: none"> • One 31,500 sf indoor turf field
Operating Profit/Loss	\$300,500 in operational revenue	(\$150,000)	N/A
Facility Usage	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • In 2011, the facility hosted 34 total tournaments with over 270,000 visitors.
Learning Points	<ul style="list-style-type: none"> • College/city partnership • Integration with University/high school facilities 	<ul style="list-style-type: none"> • Comparable city market to Elmhurst 	<ul style="list-style-type: none"> • Public/Private partnership



Comparable Aquatic Facilities

We have identified and analyzed 11 natatorium complexes located in markets comparable to Elmhurst, each offering at least one 50-meter competition pool. The following exhibit provides comparisons of the facility offerings at the selected comparable facilities including year opened, construction costs, the number of lanes and the other types of pools that are housed onsite (if any).

Exhibit 15
Summary of Comparable Aquatic Facilities

Aquatic Center	Location	Year Opened / Renovated	Const. Cost (in millions)	50M Pool	# Lanes	Additional Pool
Capitol Federal Natatorium	Topeka, KS	2010	\$3.2	Yes	8	Yes
Greensboro Aquatic Complex	Greensboro, NC	2011	\$19.0	Yes	8	Yes
Holland Community Aquatic Center	Holland, MI	1990	\$11.3	Yes	8	25Y
Indiana University Natatorium	Indianapolis, IN	1982	\$20.0	Yes	8	25Y
Lawrence Aquatic Center	Lawrence, KS	2001	\$9.5	Yes	10	Rec
Osborn Aquatic Center	Corvallis, OR	2000	\$8.2	Yes	8	No
Pleasant Prairie Rec Plex	Pleasant Prairie, WI	2010	N/A	Yes	10	Yes
SPIRE Institute	Geneva, OH	2011	N/A	Yes	10	25Y
St. Peters Rec Plex	St. Peters, MO	2007	\$18.5	Yes	6	Rec
Tualatin Hills Aquatic Center	Beaverton, OR	1978	N/A	Yes	10	No
Weyerhaeuser King County Aquatic Center	Federal Way, WA	1990	\$13.5	Yes	8	Rec

As shown, seven of the facilities have opened since 2000, four of which (Capitol Federal Natatorium in Topeka, Kansas, Greensboro Aquatic Complex in Greensboro, North Carolina, Pleasant Prairie Rec Plex in Pleasant Prairie, Wisconsin, and the Spire Institute in Geneva, Ohio) opened within the last six years. Construction costs range from a low of \$3.2 million for the Capitol Federal Natatorium to a high of \$20.0 million for Indiana University Natatorium. Importantly, nine of the eleven identified facilities offer an additional onsite pool, which is an important element to consider both from the perspective of hosting competitive meets, but also from the perspective of ongoing local use to improve overall utilization levels.

Exhibit 16 below compares the various demographic and socioeconomic characteristics among the markets that support the previously listed comparable aquatic facilities.

Exhibit 16
Comparable Aquatic Facility Demographic Summary

	Comparable Markets				Elmhurst, IL		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 12)
Population							
30-Minute Drive	161,300	2,353,500	642,400	593,800	2,353,500	366%	1
90-Minute Drive	1,521,100	10,218,200	3,666,700	3,018,400	10,218,200	279%	1
180-Minute Drive	3,917,100	17,172,700	9,446,100	7,361,000	17,172,700	182%	1
Average Household Income							
30-Minute Drive	\$64,600	\$89,300	\$72,500	\$69,000	\$89,300	123%	1
90-Minute Drive	\$65,600	\$93,000	\$75,100	\$74,900	\$86,400	115%	3
180-Minute Drive	\$65,300	\$86,300	\$72,300	\$69,500	\$79,100	109%	3
Median Age							
30-Minute Drive	33.2	42.2	36.8	36.5	38.7	105%	2
90-Minute Drive	36.5	41.8	37.9	37.6	36.8	97%	10
180-Minute Drive	36.7	41.2	38.2	38.1	37.3	98%	10
Corporate Base							
30-Minute Drive	7,100	101,700	27,600	21,200	101,700	368%	1
90-Minute Drive	68,500	394,300	148,600	119,300	394,300	265%	1
180-Minute Drive	171,800	670,900	373,700	322,700	670,900	180%	1

As shown, the population base within a 30-minute drive of natatorium facilities in the identified comparable markets averages approximately 642,400, which is more than three and a half times less than the nearly 2.4 million people residing within 30 minutes of Elmhurst. Elmhurst's average household income and corporate base also compare favorably against the markets identified.



The following exhibit summarizes key physical and operational characteristics of several aquatic facilities from the list above that for multiple reasons offer insightful and comparable example as to how an Elmhurst aquatic facility may operate and programmatically resemble.

**Exhibit 17
Comparable Aquatic Facility Comparison**

	Greensboro Aquatic Center	Lawrence Aquatic Center	Weyerhaeuser King Aquatic Center	Tualatin Hills Aquatic Center
City, State	Greensboro, NC	Lawrence, KS	Federal Way, WA	Beaverton, OR
Year Opened	2011	2001	1990	1978
Owner	Greensboro Parks and Recreation Department	Lawrence Parks and Recreation	King County	Tualatin Hills Parks and Recreation Department
Operator	Greensboro Parks and Recreation Department	Lawrence Parks and Recreation	King County	Tualatin Hills Parks and Recreation Department
Construction Cost	\$19.0 million (includes \$3.2 million for land acquisition)	\$9.5 million	\$13.5 million	N/A
Funding for Construction	<ul style="list-style-type: none"> \$12.0 million in general obligation bonds \$3.2 million in City funding for land acquisition Hotel motel tax to close deficit 	<ul style="list-style-type: none"> Countywide one cent sales tax (adopted in 1994) 	<ul style="list-style-type: none"> \$8.5 million County bond Land donated by Weyerhaeuser family \$5 million in private funding from Seattle Goodwill games 	<ul style="list-style-type: none"> N/A
Pool Inventory	<ul style="list-style-type: none"> 50-meter, 8 -lane pool 25-yard diving well Therapeutic pool 	<ul style="list-style-type: none"> 50-meter, 10 lane pool Separate recreation pool 	<ul style="list-style-type: none"> 50-meter, 8-lane pool 2 bulkheads Separate recreation pool 	<ul style="list-style-type: none"> 50-meter, 10- lane pool (2) 1-meter springboards (2) 3-meter springboards
Operating Profit/Loss	Annual deficit (exact amount N/A)	(\$485,000)	(\$1,448,000)	(\$783,000)
Public Subsidy	Yes	Yes	Yes	Yes
Facility Usage	<ul style="list-style-type: none"> 45 to 50 swimming and/or diving events per year Home to 3 year round swimming clubs, 1 diving club, 4 high schools 2 clubs use facilities 35 to 40 hours per week (7 to 8 lanes each) 	<ul style="list-style-type: none"> Approximately 37 swim meets per year Local USA swim clubs host eight meets per year Approximately six high school meets per year 	<ul style="list-style-type: none"> 45 swim meets in a recent year 20 club-hosted meets 6 collegiate meets 4 high school meets 15 other/dive events 375,000 attendees in a recent year 	<ul style="list-style-type: none"> N/A
Learning Points	<ul style="list-style-type: none"> City-funded City-operated Significant economic impact Comparable market 	<ul style="list-style-type: none"> Comparable market Strong local support Mix of serving local needs and generating economic impact 	<ul style="list-style-type: none"> Pacific Northwest market Significant economic impact Substantial seating capacity (2,500) Strong local support 	<ul style="list-style-type: none"> Multipurpose facility with many other components



Comparable Ice Arenas

We have identified 11 comparable indoor ice arena complexes throughout the country. The following exhibit provides comparisons of the facility offerings at the selected comparable facilities including year opened, building square footage footprint, and the size of the ice sheet(s) within each facility.

**Exhibit 18
Summary of Comparable Ice Arenas**

Facility	Location	ST	Year Opened/ rennovated	SF	# of Ice Sheets	Size of Ice Sheet
St. Peters Rec-Plex	St. Peters	MO	2007	236,000	5	NHL
Braemar Field & Arena	Edina	MN	N/A	N/A	3	NHL
Oaks Center Ice	Oaks	PA	1997	61,000	3	NHL
7 Bridges Arena	Woodridge	IL	N/A	97,000	2	NHL/Olympic
Franklin Nelson Recreation Center	Springfield	IL	1973	78,000	2	NHL
Aviator Sports & Events	Brooklyn	NY	N/A	175,000	2	NHL
Pleasant Prarie Rec Plex	Pleasant Prairie	WI	2000	302,000	2	NHL
Norway Savings Bank Arena	Auburn	ME	2014	N/A	2	NHL
Swonder Ice Arena	Evansville	IN	2002	90,000	2	NHL
Arctic Coliseum	Chelsea	MI	2000	85,000	2	NHL
Hyannis Youth and Community Center	Hyannis	MA	2009	N/A	2	NHL

As shown, six of the eleven facilities have opened since 2000. Building footprint ranges from a low of 61,000 square feet at Oaks Center Ice in Oaks, Pennsylvania to a high of 302,000 square feet at the Pleasant Prairie Rec Plex in Pleasant Prairie, Wisconsin. All of the facilities feature at least two sheets of ice with the 7 Bridges Arena in Woodridge, Illinois as the only facility featuring an ice sheet larger than NHL-sized (i.e., 200' x 85').

Exhibit 19 presents a comparison of the various demographic and socioeconomic characteristics among the markets that surround the identified ice facilities.

Exhibit 19
Comparable Ice Arena Demographic Summary

	Comparable Markets				Elmhurst, IL		
	Low	High	Average	Median	Estimate	% of Avg. (out of 12)	Rank
Population							
30-Minute Drive	120,900	3,797,400	1,033,700	593,800	2,353,500	228%	2
90-Minute Drive	918,800	19,099,500	6,148,100	4,170,000	10,218,200	166%	2
180-Minute Drive	6,063,700	36,467,400	14,815,900	9,928,800	17,172,700	116%	4
Average Household Income							
30-Minute Drive	\$62,700	\$117,400	\$83,800	\$83,000	\$89,300	107%	4
90-Minute Drive	\$58,700	\$101,500	\$80,400	\$86,400	\$86,400	107%	5
180-Minute Drive	\$65,300	\$95,600	\$81,300	\$81,000	\$79,100	97%	7
Median Age							
30-Minute Drive	35.7	50.5	39.4	38.7	38.7	98%	6
90-Minute Drive	36.8	43.5	39.0	39.1	36.8	94%	11
180-Minute Drive	37.3	40.1	38.8	38.8	37.3	96%	12
Corporate Base							
30-Minute Drive	5,000	103,200	40,000	21,200	101,700	254%	2
90-Minute Drive	38,000	822,000	252,900	170,600	394,300	156%	2
180-Minute Drive	252,000	1,481,800	607,800	451,900	670,900	110%	4

Elmhurst ranks favorably among markets offering comparable ice arena facilities. The population and corporate bases surrounding Elmhurst again ranks near the top among the markets reviewed. While average household income also ranks near the top of comparable markets reviewed, it is not as strong as some of the other comparable market analyses conducted, perhaps indicative of the typically higher average household income levels among families participating in hockey and other ice sports.



The following case studies summarize key physical and operational characteristics of ice complexes that are believed to be comparable in certain ways to a potential new Elmhurst Indoor Sports Facility with an ice focus in terms of location, size programmatic elements and other such factors.

**Exhibit 20
Comparable Ice Arena Demographic Summary**

	Pleasant Prairie RecPlex	Oaks Center Ice
City, State	Pleasant Prairie, Wisconsin	Oaks, Pennsylvania
Year Opened	2000	1997
Owner	Village of Pleasant Prairie	Private
Operator	Village of Pleasant Prairie	Private
Construction Cost	N/A	\$7.0 million
Funding for Construction	<ul style="list-style-type: none"> \$30 million bond 	<ul style="list-style-type: none"> Private investor
Square Feet	302,000 sf	61,000 sf
Ice Sheet Inventory	<ul style="list-style-type: none"> Two 200'x85' ice sheets 	<ul style="list-style-type: none"> Three 200'x85' ice sheets
Operating Profit/Loss	\$807,467 in operational revenue	Profit (undisclosed)
Facility Usage	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Youth hockey makes up 80% of ice time sold 10% sold to high schools and adult hockey leagues 10% goes to figure skating and open skate
Learning Points	<ul style="list-style-type: none"> Comparable and competitive market 	<ul style="list-style-type: none"> Comparable market to Elmhurst

Conclusions

The viability of any potential new Indoor Sports Facility in Elmhurst is dependent, in large part, on its position in the competitive sports facility landscape, which will directly influence its ability to attract league play and tournaments/meets from the regional market. While there are a significant number of facilities throughout the greater Chicago metropolitan area, the Libertyville Sports Complex is the only facility within 40 miles of Elmhurst that offers more than four courts at one single location (the Libertyville Sports Complex offers eight indoor basketball courts). Similarly, there are currently no 50-meter indoor pools throughout the Chicago metropolitan area; however, plans are in place to develop a 50-meter pool, with a warm-up/leisure pool and seating for competitions in Westmont, just south of Elmhurst. This would be a significant competitor to any new aquatics-oriented Indoor Sports Facility developed in Elmhurst.

Conversely, there are moderate levels of competition throughout the market for both indoor turf and ice facilities. As such, it will be critical for Elmhurst to determine whether there is sufficient local demand for these facilities, as the competitive environment for non-local tournaments, meets and competitions is considered moderate.

More than 40 indoor sports facilities offering dedicated or combined use facilities throughout the country were reviewed, including 13 gymnasium facilities, 9 indoor turf facilities, 11 indoor ice rinks and 11 natatoriums. These venues were targeted to provide comparative market context for a potential new Elmhurst Indoor Sports Facility, as well as to assist in formulating hypothetical utilization of any new facility product in Elmhurst.

The population, average household income and corporate base levels of the primary market area surrounding Elmhurst compares favorably to the markets offering comparable indoor sports facility components. Data was collected regarding estimated construction costs, financial operations and event levels among a critical number of these venues. The implications of these metrics vary greatly depending on the ultimate facility program of event space and operational mandate (i.e., privately owned/operated for-profit, municipally-run with the goal of serving the community; run with the goal of attracting economic impact generating events, etc.). It will be important to carefully consider facility program development options and operational mandates when identifying supportable facility programming and funding opportunities for facility development and operations.

5.0 MARKET DEMAND ANALYSIS

The purpose of this chapter is to evaluate the market demand associated with a potential new Elmhurst Indoor Sports Facility. The overall market analysis consisted of detailed research and analysis, including a comprehensive set of market-specific information derived from the following:

- ✓ Experience garnered through more than 500 sports, recreation and event facility feasibility, planning and benchmarking projects throughout the country.
- ✓ Local market visits at the outset of the project, including community and facility tours, and discussions with study stakeholders.
- ✓ In-person and telephone interviews, meetings and focus groups with in excess of 50 local Elmhurst area individuals, including representatives and individuals affiliated with Elmhurst Park District, City of Elmhurst, DuPage County Convention and Visitors Bureau, local educational institutions, local sports and nonprofit organizations, potential funding partners, and other local area individuals.
- ✓ Research and analysis of local market conditions, existing facilities and infrastructure and amateur sports and recreation trends.
- ✓ Benchmarking research and analysis of facility data and interviews conducted with management of nearly 100 comparable indoor sports facilities located throughout the region and country.
- ✓ Comparative analysis of socioeconomic data from competitive/comparable facility markets.
- ✓ Online survey of over 750 Elmhurst and community residents.
- ✓ Completed telephone interviews with more than 50 representatives of potential indoor sports facility user groups with state, regional and/or national tournament/meet scope.

The focus of much of the remainder of this chapter is focused on the data obtained from the three primary surveys/interview techniques deployed for this study:

1. The Online Community Survey. Represents the primary market from which it is anticipated that the majority of participants and attendees are expected to originate.
2. User Group Survey—Local Sports Organizations. In-person and telephone interviews of representatives of local sports organizations, clubs, programs, and leagues were conducted.
3. User-Group Survey—Non-Local Sports Organizations. Telephone interviews were conducted with representatives of state, regional and national organizations that produce tournaments, meets and competitions.

Amateur and recreational sports facilities, like those being considered for this study, typically host a mix of local and non-local sports and recreation activities. In most cases, these facilities are conceived, developed and operated with the intent of providing optimized venues to best compete for tournaments that draw new visitors to the area (participants and spectators), thereby generating new economic impact for host communities. Nevertheless, local usage of these facilities (through local league play, recreation, clinics and camps) is typically critical in sustaining utilization levels and generating operating revenue, in addition to providing an attractive community resource and enhancing quality of life for local residents. Ultimately, a full picture of utilization for a potential new Elmhurst Indoor Sports Facility cannot be reached without testing both local and non-local markets.

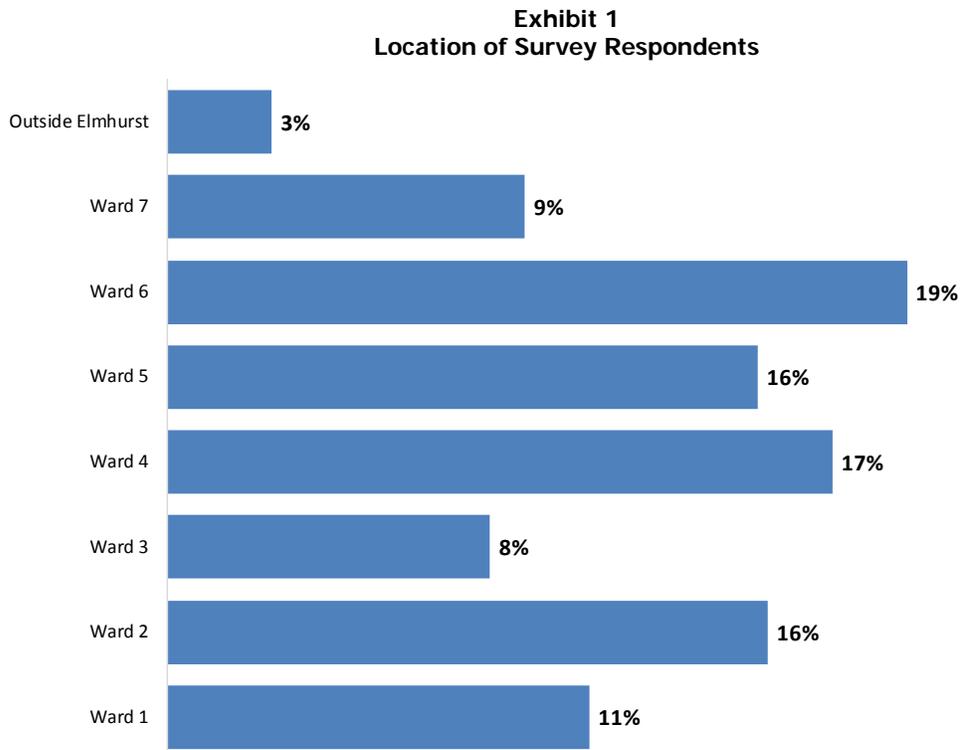
A summary of the market demand research, key organizations interviewed, and analysis and conclusions for facility type is provided below and on the following pages.

Community Survey Analysis

The purpose of this section is to provide a summary of the survey research conducted among Elmhurst-area community members. A primary objective of the survey was to ascertain interest levels and opinions of Elmhurst community members and other local stakeholders regarding which, if any, components of a new Indoors Sports Facility would best serve the needs of the Elmhurst community.

With the assistance of the Elmhurst Park District, the City of Elmhurst, local community organizations/stakeholders, a link to an online survey was distributed for the purposes of gathering direct feedback on the proposed project. The online survey remained open from June 22, 2016 through July 7, 2016 and a total of 767 responses were received. More detail concerning Community Survey responses is provided in Appendix B at the conclusion of this report.

Respondents were first asked to identify the ward in which they reside, or whether they live outside of Elmhurst. Responses are presented in Exhibit 1 below.

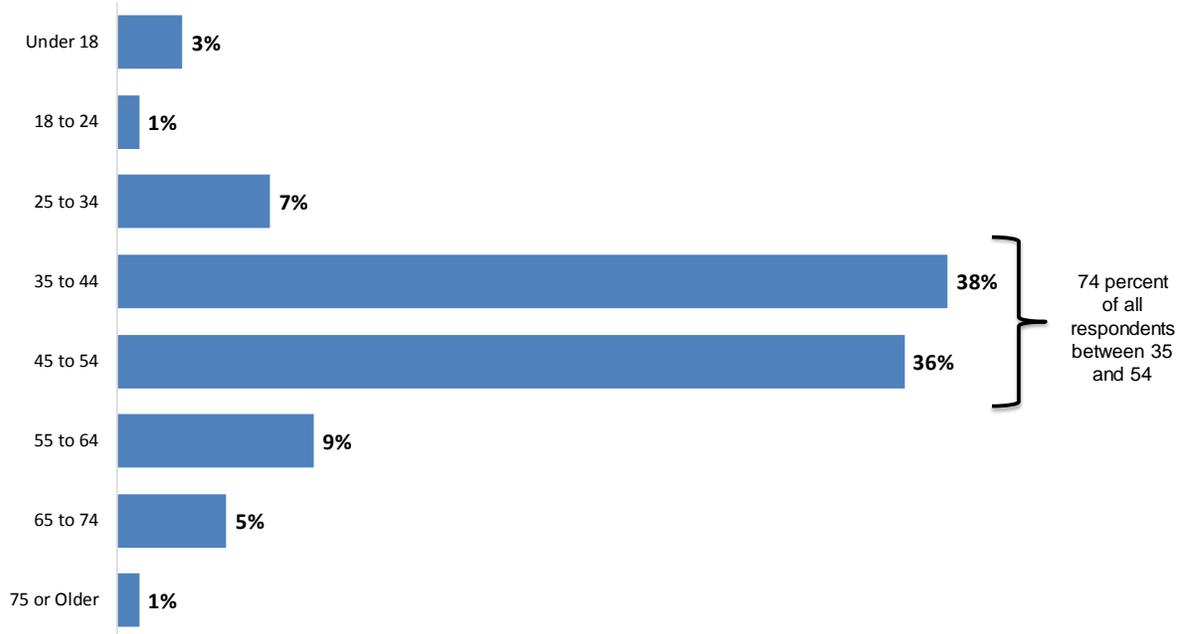


Note: Results show n representative of 767 survey respondents.
Source: CSL Community Survey, 2016

For those respondents living in Elmhurst, responses were generally consistent with population levels in each of seven Elmhurst wards, which suggests a fairly representative portrayal of preferences among Elmhurst residents.

Respondents were also asked to provide their age, as presented below in Exhibit 2.

Exhibit 2
Age of Survey Respondents

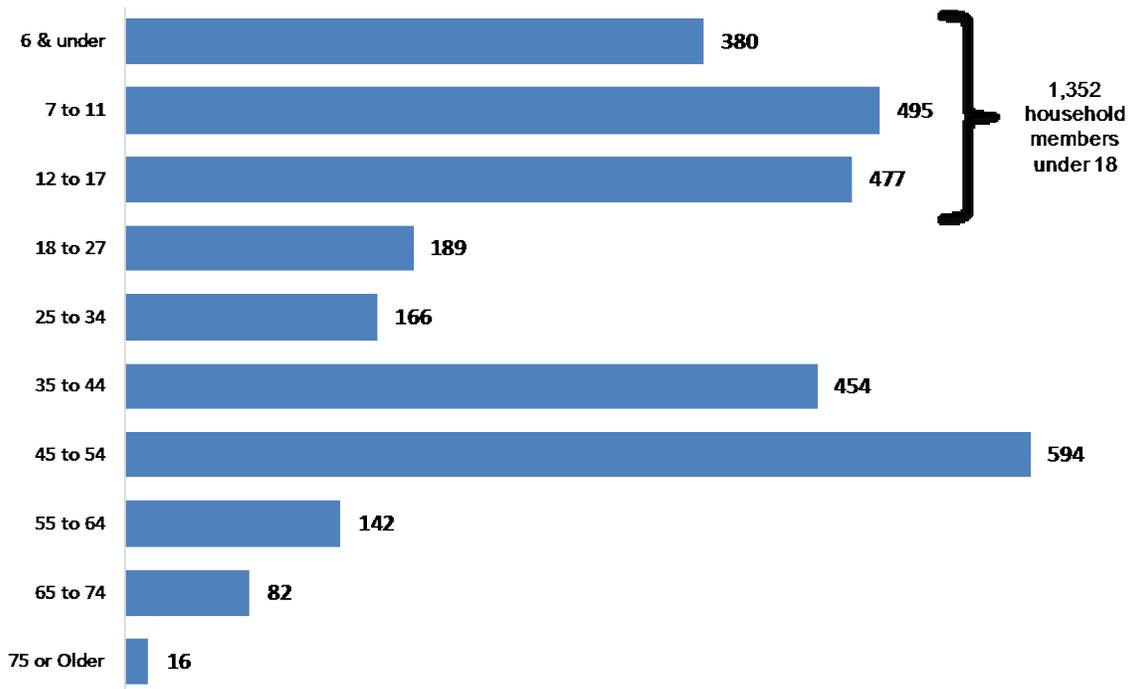


Note: Results show n representative of 767 survey respondents.
Source: CSL Community Survey, 2016

As shown, approximately 74 percent of respondents indicated they are between the ages of 35 and 45. Specifically, 38 percent of respondents are 35 to 44 and 36 percent are between 45 and 54. The next most represented age groups are the 55 to 64 age group (nine percent of respondents) and 25 to 34 year olds (seven percent). As will be further examined, this suggests that a significant percentage of respondents are families with children active in sports.

To investigate this hypothesis further, we asked respondents to note the number of household members within each of age group listed below. Responses are summarized below in Exhibit 3.

Exhibit 3
Number of Household Members by Age

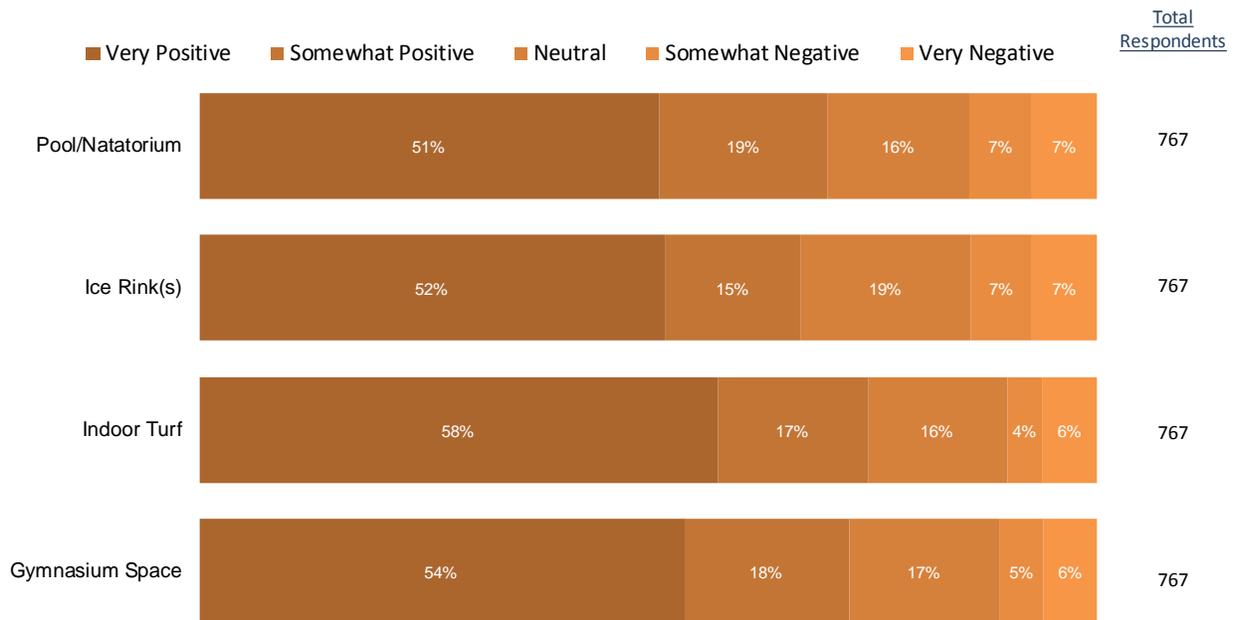


Note: Results shown representative of 767 survey respondents and 2,965 household members.
Source: CSL Community Survey, 2016

In total, there were nearly 3,000 household members identified through the survey process. More than 1,350 household members were identified as under the age of 18 (approximately 45 percent). The 35 to 54 age groups represent the next largest segment, accounting for approximately 1,050 household members or an estimated 35 percent of all household members noted.

Following these introductory questions, community survey respondents were asked to rate their attitude towards a potential new Elmhurst Indoor Sports Facility that offered gymnasium space, indoor turf, ice rink(s) and/or pool/natatorium. Responses provided by facility type are presented below.

**Exhibit 4
Attitude Towards Proposed Elmhurst Facilities**



Source: CSL Community Survey, 2016

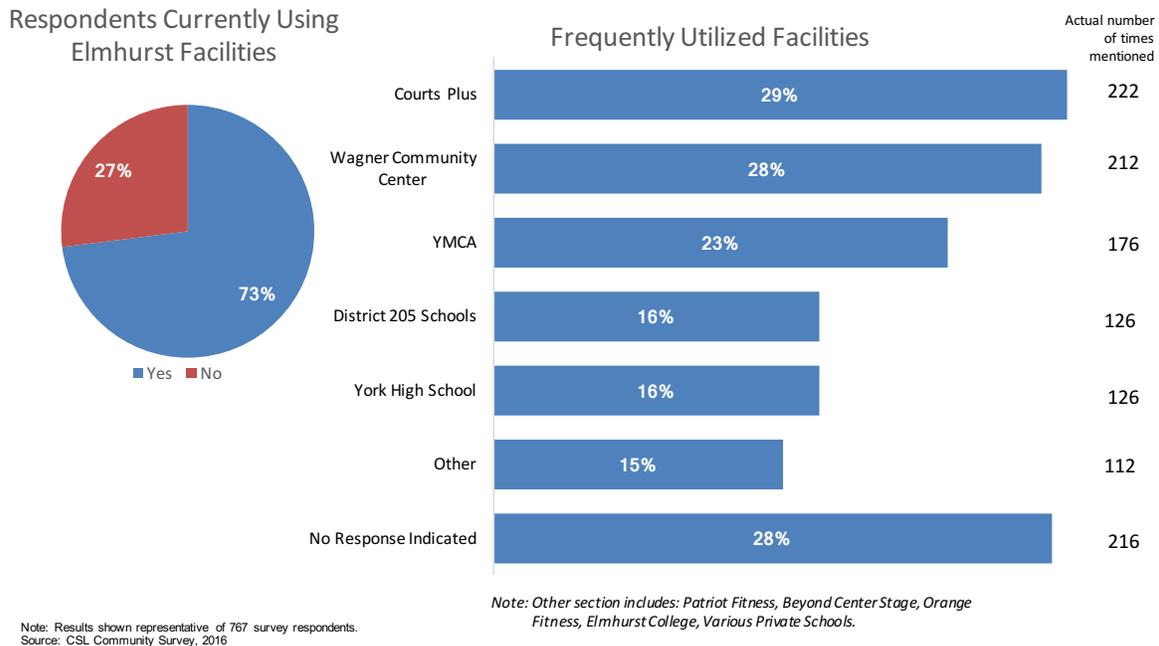
Survey respondents were given five choices of very positive, somewhat positive, neutral, somewhat negative, and very negative to describe their attitudes toward a proposed Elmhurst facility. As shown above, there was strong positive response for indoor turf and gymnasium space, which received combined “Very Positive” and “Somewhat Positive” response rates of 75 percent and 72 percent, respectively. Pool/Natatorium and Ice Rink facilities also received strong positive responses of 71 percent and 67 percent, respectively. Overall, fewer than 14 percent of respondents noted combined “Somewhat Negative” or “Very Negative” responses among all four options.

When comparing responses among individuals indicating a “Very Positive” attitude towards each of the four identified facility types, it was interesting to note somewhat of a correlation between respondents supporting indoor gymnasium space and those supporting indoor turf space. Additionally, we looked at attitudes of respondents that indicated that at least one member of their household is under 18, as compared to those without kids in the household. Interestingly, the rate of “Very Favorable” responses among households with kids under 18 is somewhat higher than the overall “Very Favorable” rate noted (more than 8 percent higher). Conversely, households with no kids under 18 recorded much lower “Very Favorable” rates relative to the aggregated results (nearly 31 percent lower).



An important component to consider when contemplating indoor sports facility development in Elmhurst is the potential impact on current facilities being utilized within the community. Respondents were asked to indicate whether they currently use facilities in Elmhurst, and if so, which facilities. Responses are presented in Exhibit 5.

**Exhibit 5
Frequently Used Elmhurst Facilities**

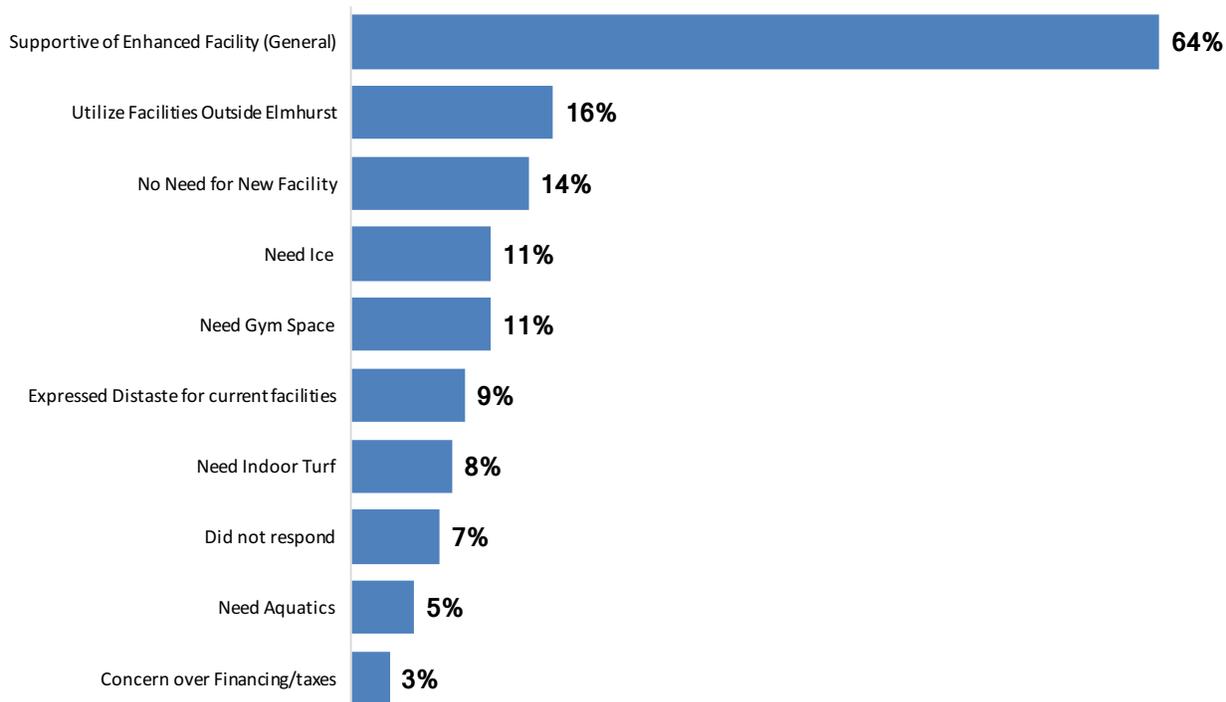


Approximately 73 percent of all survey respondents use an indoor sports facility in Elmhurst, while 27 percent indicated that they do not use any indoor sports facilities. The facilities most frequently utilized are Courts Plus, with 29 percent of respondents indicating having used the facility and the Wagner Community Center with 28 percent. Approximately 23 percent of respondents indicated having used the Elmhurst YMCA and approximately 16 percent of respondents indicating having used District 205 Schools facilities and York High School facilities, respectively. Importantly, respondents were able to provide multiple responses, and percentages represented show the portion of responses among all respondents; therefore, total percentages of responses exceed 100 percent.



Survey respondents were subsequently asked to describe their opinions of Elmhurst facilities. Open-ended responses were collected, categorized and quantified by general concepts mentioned within the responses. The following exhibit presents a summary of the most frequently offered responses.

**Exhibit 6
Opinions on Elmhurst Facilities**

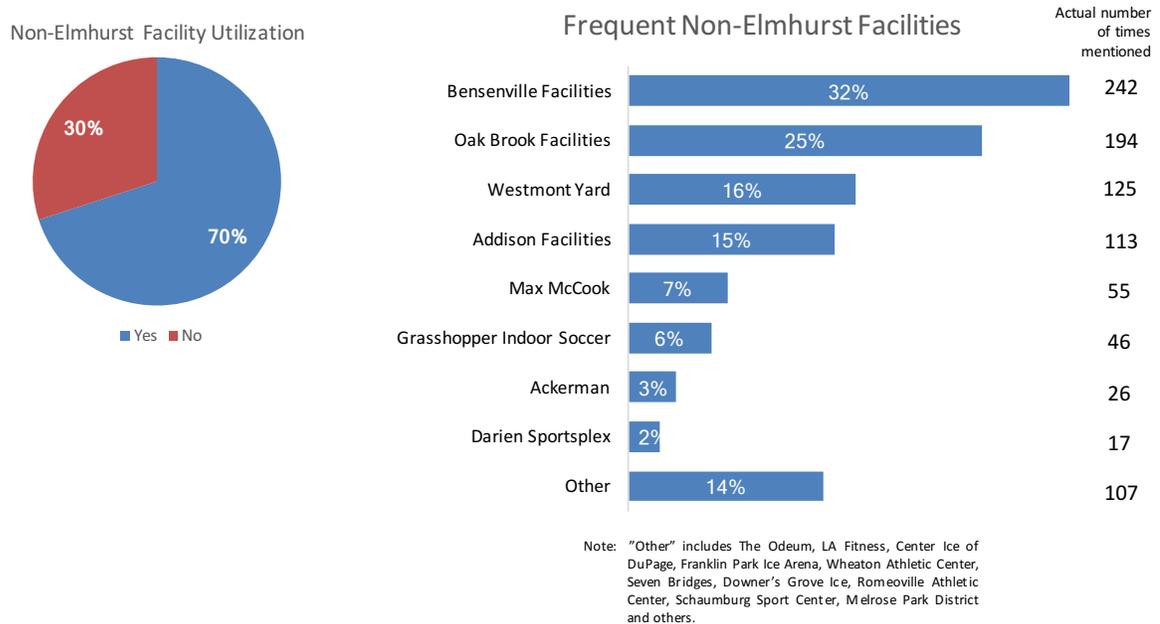


Note: Results shown representative of 767 survey respondents.
Source: CSL Community Survey, 2016

As presented, approximately 64 percent of all respondents generally indicated support for developing enhanced indoor sports facilities in Elmhurst of any type of facility (ice, gym, turf, aquatics, etc.). Conversely, only 14 percent of respondents suggested that no new facilities are currently necessary. Ice rink and indoor gymnasium space were the most frequently mentioned facility types noted among these unsolicited responses, as approximately 11 percent of respondents noted a need for these types of facilities, respectively. Indoor turf space was mentioned next most frequently by eight percent of respondents, while just five percent of respondents indicated a need for aquatics facilities. Importantly, respondents were able to provide more than one response.

The next step of the survey was to determine what facilities community members are utilizing outside of Elmhurst. With a considerable number of available facilities surrounding Elmhurst, an inventory of the most utilized facilities by community members is expected to provide an indication of which facilities may be most competitive to any potential indoor facilities in Elmhurst. Survey respondents were first asked whether or not they utilized a facility outside of Elmhurst, followed by an open-ended explanation of which facilities they utilize, as presented below.

**Exhibit 7
Facility Utilization Outside of Elmhurst**



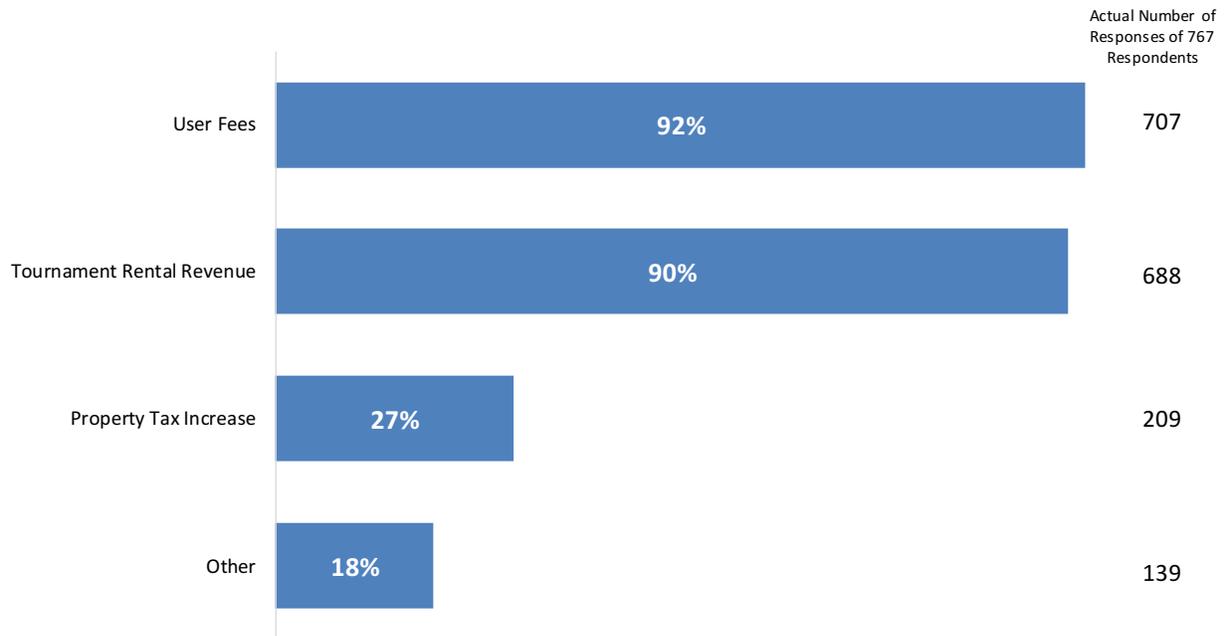
Note: Results shown representative of 767 survey respondents.
Source: CSL Community Survey, 2016

As shown above, approximately 70 percent of Elmhurst residents noted that they are currently utilizing facilities outside of Elmhurst. An estimated 32 percent of respondents indicated that they are using Bensenville facilities, including The Edge Ice Arena. Oak Brook facilities, including the Community Recreation Center and Aquatic Center, were mentioned by approximately 25 percent of respondents. Westmont Yard and Addison facilities were mentioned by 16 and 15 percent of respondents, respectively.



An important aspect to consider among Elmhurst residents is how to fund the development and/or operations of an indoor sports facility. Respondents were asked to identify which, if any, mechanisms they would support between user fees, tournament rental revenue, property tax increases, or other mechanisms. A summary of responses is shown in Exhibit 8.

**Exhibit 8
Potential Financing Mechanisms
To Support New Facilities**



**Common 'other' responses included: Private funding/corporate sponsorship, Facility revenue, contracting to outside teams, advertising, or "would not support"

Source: CSL Community Survey, 2016

Respondents overwhelmingly indicated a preference for user fees or tournament rental revenue as sources of financing for facility development. This response rate is consistent with typical responses among local community members when asked about funding such facilities. It is interesting to note, however, that approximately 27 percent (more than 200 respondents) indicated a willingness to consider property tax increases to support facility development and/or operations. Typically, this response rate is much less, which suggests that the previously noted support for new indoor sports facilities in Elmhurst is more than just a desire to have new facilities, but an actual willingness to support their development financially.

Additional detail regarding the Community Survey and the opinions provided by community stakeholders can be found in Appendix B.



Potential User Group Surveys

In addition to initial in-person interviews with local stakeholders in the market's amateur sports sector, telephone interviews were conducted with representatives of potential user groups, providing the primary basis for the estimation of market demand presented herein. Key representatives from local and non-local youth sports organizations and regional and national tournament organizers were interviewed in person and/or by telephone to assess their potential interest in utilizing a new Elmhurst Indoor Sports Facility. A summary of the market demand research, analysis and conclusions by sport is provided on the following pages.

A sampling of organizations contacted as a part of this study included, but were not limited to:

Blue Chip Tournaments	Elmhurst FC Soccer Club	New Wave Club Volleyball (Travel)
1st Lions Alliance	Elmhurst Jr Dukes Wrestling Club	New Wave Lacrosse
200x85 Hockey tournaments	Elmhurst Royals	New Wave Lacrosse (Girls)
3on3 Elmhurst	Elmhurst Sports	North American Youth Sports
AAU Boys Basketball	Epic School of Wrestling	Oak Park Curling Club
AAU Gymnastics	Fencing Center of Chicago	Parisi Speed School
AAU Volleyball	Gameday USA	Premier Volleyball League
AAU Wrestling (National)	Hockey Time Productions	Team Illinois Cheer
ACA Hoops	Hoops Intensity Training	The Chicagoland Youth Football League
Airbourne Basketball	Ice Skating Institute	Top Flight Volleyball Club
All American - 7 on 7	ICE Volleyball club	Top Tier Baseball & Softball
Alligator Aquatics	Illinois AAU Girls	Ultimate Hockey Tournaments
American Tae Kwon Do Association	Illinois Baseball Academy	United States Youth Volleyball League
Belusa United Volleyball Club	Illinois Curling Association	Universal Cheerleaders Association
Big Foot Hoops	Illinois High School Association	Universal Dance Association
Breakaway Basketball	Illinois Hockey AAU	US Basketball Association
British School Swim Elmhurst	Illinois Recreational Cheerleading Association	USA Gymnastics
Bull-Sox Youth Academy	Illinois Swimming	USA Swimming
Canlan Classic Tournamens	Illinois Water Polo	USA Table Tennis
Chang's Martial Arts Academy	Junior Volleyball Association - National	USA Taekwondo National Championships*
Cheer Ltd, Inc.	Karen Russ	USA Volleyball
Chicagoland Indoor soccer	Knights Basketball	USA Wrestling
Chicagoland Youth Basketball Network	Lil' Kickers	USSSA Boys Basketball
Chicagoland Youth Football League	Lyons Township Soccer Club	USSSA Taekwondo
Delaney Hockey	Midwest Badminton Association	Varsity All Star Cheerleading
DuPage Training Academy	MyHockey Tournaments	Wheaton Swim Club
Eclipse Soccer Club	National Cheerleaders Association	YMCA
Elmhurst Explosion	National Collegiate Table Tennis Association	Youth Basketball of America
Elmhurst Extreme	Netlynx Sports	

It is understood that one intent of this study is to assess demand by local Elmhurst area sports groups and participants, including evaluating the ability of the area's current facilities to accommodate this demand. As such, detailed summaries related to each of the primary local organizations interviewed are presented within this chapter.

While understanding demand issues associated with local groups is critical in a study of this nature, it is also important to appropriate research and analyze non-local demand sources. For nearly all state-of-the-industry indoor sports facilities, demand sources with significant non-local participants/spectators are often critical in driving facility utilization and revenues. Even with providing local users with priority scheduling and rates, the opportunity to attract and accommodate tournaments and meets with significant nonlocal participant/spectator composition was important to investigate. Further, distinguishing lines between "local" and "nonlocal" are often not distinct, as a significant portion of events will have varying degrees of

local involvement (direct and indirect) in terms of event procurement and athlete/team participation by local organizations in tournaments/meets that might normally be described as “non-local”. A full picture of utilization for potential new indoor sports facilities cannot be reached without testing both local and non-local markets.

A summary of the market demand research, analysis and conclusions by facility type and key organization interviewed is provided below and on the following pages.

Indoor Court Users

Basketball is the leading participatory team sport in the U.S. Based on national statistics, there are approximately 25.5 million individuals that participated at least once in basketball last year. Of this amount, approximately 22 percent (5.7 million) were considered frequent participants, having participated 25 or more days in the last year.

There are approximately 10.1 million individuals that participated at least once in volleyball within the past year. Of this amount, approximately 34 percent (3.4 million) were considered frequent participants, having participated 25 or more days in the last year. Approximately 70 percent (7.1 million) played volleyball at least 13 times last year.

Many indoor facilities at athletic complexes are constructed to be multipurpose in nature, being flexible to host and accommodate a number of varying sports, recreation and other indoor activities. Oftentimes, basketball and volleyball courts can be utilized for indoor soccer, indoor football, cheer/dance competitions, indoor lacrosse, martial arts, wrestling, inline/roller hockey, gymnastics and other sports.

In-depth telephone interviews were completed with representatives of local and non-local indoor gymnasium space users (such as basketball, volleyball, gymnastics, and martial arts groups) in order to learn their current usage of facilities in the Elmhurst area as well as to measure their interest in using a potential new Indoor Sports Facility. The summaries on the following pages provide insights gained from each key user group/category interviewed for this study.



Elmhurst Airborne Basketball



Elmhurst Airborne is a non-for-profit competitive traveling basketball club for boys and girls ages nine to fourteen (4th through 8th grades) that live within the Elmhurst School District 205 boundaries. The season runs from mid-October through February/early March, with practices held twice a week at District 205 schools and/or gyms and a minimum of one game per week. The league currently has 18 teams, each with between 8 and 12 total players. League representatives have indicated that they would like to host more teams, but have been forced to cut players because of limited availability of court space.

Currently, Airborne hosts a one-day tournament in early January, with all games played at courts available at York High School. The tournament is open to both boys' and girls' teams in four different age brackets, and has sold out each of the past few years.

League representatives noted that last minute practice/game cancellations have made it increasingly difficult to schedule guaranteed gym space at District 205 facilities. Furthermore, with the program turning away both league and tournament participants, they would welcome additional gym space in the community. A minimum of a four-court facility could accommodate their regular needs, and allow them to moderately grow their local presence and host one or two more non-local tournaments. With eight courts available to them, the potential exists to host up to a 120-team tournament that would last two days.

Elmhurst Sports



Elmhurst Sports is a new in-house basketball organization in Elmhurst operating 13 different basketball leagues for boys and girls, ages 7 through 18. The organization has over 100 teams and nearly 1,000 participants. Each team practices for at least one hour per week, totaling over 100 hours of practice/booked gym time per week. Games are played at York High School

with ages 14 through 18 playing Sunday, and ages 7 through 14 playing on Saturday. All practices and games are played at District 205 Schools, with high school leagues played at York High School, middle school leagues at York High School and at middle school gyms, and with the elementary school leagues playing at the elementary school gyms. Their season runs for eleven weeks starting at the end of December, until the beginning of March.

Lions Volleyball Club/1st Alliance Volleyball Club



1st Alliance Volleyball Club and its affiliates, including Lions Juniors, City Lions Juniors, Lions Juniors South, Lions Juniors West, Lions Juniors Woodridge and 3rd Coast Elite, have hundreds of girls participating in indoor fall and winter leagues, along with an outdoor beach volleyball program in the summer. The Lions Jrs. Fall League has nearly 1,500 players and 150 teams participating. The league runs for eight weeks, starting after Labor Day, with games held every weekend starting the second week of the season. All games are held at MAX McCook, Ackerman Sports & Fitness Center in Glen Ellyn, St. John's Evangelical Church in Lombard or the Volleyball Training Facility in Woodridge.

There are approximately 40 teams and over 400 girls participating in the Winter 1st Alliance and Lions West programs, which runs from the second week in January through April. Teams practice once a week and have games on Sundays.

Club representatives indicated a potential interest in hosting practices and games in Elmhurst, as a number of participants reside in the community. They would need four volleyball courts (approximately two full-sized basketball courts) for their activity. Additionally, the potential exists to host a winter and/or fall tournament in Elmhurst that could attract between 10 and 15 teams per tournament, averaging 10 players per team. However, Club representatives noted that it may be difficult to compete against facilities in Schaumburg and Rosemont with their existing tournament presence.

Knights Basketball



Knights Basketball is a competitive travel program that includes teams from Elmhurst and surrounding areas. The program features over 200 participants ranging from 8 to 14 years of age with 10 to 16 players per team. Seasons run from mid-October thru early March and each season includes about 30 to 45 games, depending on the age level. Each age group holds two practices and one to two games per week that takes place at the Oak Brook Family Recreation Center.

It is unlikely that the Knights Basketball organization would shift any significant activity away from the Oak Brook facility to a new indoor court facility in Elmhurst, as it is expected that a new facility would not necessarily help expand their program. Further, they do not see an imminent need to change venues as they are currently satisfied with the Oak Brook Facility.

3ON3 Elmhurst



3ON3 Elmhurst is a fundraiser event to support the Hydrocephalus Association of America, which is an organization that promotes a cure for a brain disease that can create developmental, physical and/or intellectual impairments or even death. The one-day tournament currently attracts 60 to 70 teams each year and is open to Elmhurst residents and surrounding community basketball players ages 7 to 70. The tournament is hosted every March at Elmhurst College with teams of three to five players that compete in two games of pool play, 15 minutes each game, followed by a bracketed single elimination tournament. Each pool is organized into grade, gender, adult, and senior divisions in order to create a competitive and fun atmosphere.

The Tournament Director indicated they would look to utilize a new indoor sports facility in Elmhurst and stated he would like to expand his tournament from a one-day to a two-day tournament in order to attract over 100 teams to continue its growth from outside the region.

Potential Non-Local User Groups

Basketball Demand

The basketball season in the greater Chicago metro area typically runs from March through June with tournaments running nearly every weekend during this time period. The average size per team is 12 to 14 players ranging in age from 9 to 18 years old. Conversations with basketball organizers suggest that the large majority of existing facilities are well suited to accommodate local community demand; however, the lack of a critical mass within each of these facilities limits the opportunity to market and attract larger regional and national tournaments. State and regional basketball planners noted a multi-court facility with six courts would be the minimum required to accommodate regional and national demand. It is also important to note that a greater competition level at the tournament generates a greater need for hardwood courts. Sportcourt was noted as appropriate for local teams, tournaments for younger age groups and potentially for use on supplemental court space. However, the top levels of competition, tournament games within the winner's bracket of a tournament or following round-robin play and especially for championship games likely requires a hardwood court surface.

Tournament promoters and organizations such as AAU Boys Basketball, Breakaway Basketball, Hoops Intensity Training, NETLYNX Sports, USSSA Basketball and Youth Basketball of America specifically expressed an interest in potentially hosting tournaments in Elmhurst. Each tournament would last two to three days, on average, and would have the potential to attract two or three 20 to 40 team tournaments and up to four larger 60 to 120 team tournaments. A potential 20 to 40 team tournament would last about two days and need to utilize a minimum of four courts for about 12 hours per day. A potential 60 to 120 team tournament organizer prefers a minimum of six courts within a facility in order to fit all the necessary games into a two- to three-day span. The average size per team is 12 to 14 players ranging in age from 9 to 18 years old. Additional facility requirements or preferences would include a public space for a concessions stand, public restrooms, bleachers or foldable chairs for spectators, and wall mounted or portable scoreboards.

Volleyball Demand

The volleyball season in the greater Chicago metro area runs from November through May with tournaments running nearly every weekend. There are about 10 to 12 players on average per team ages 9 to 18 years old. Volleyball organizers from regional and national levels indicated an overall moderate level of demand for additional court space in the greater Chicago metro area. Tournament organizers such as New Wave Volleyball Club, Top Flight Volleyball Club, and the United States Youth Volleyball League expressed an interest in potentially hosting four to six tournaments annually in the Elmhurst area that would be expected to attract up to 30 to 50 teams per tournament.

These tournaments require a minimum of four volleyball courts for nine to 12 hours per day, though six to eight courts provide a significant amount of enhanced flexibility for scheduling. Teams average two people traveling per participant. Most tournament organizers noted that playing on sportcourt is acceptable; however, the higher levels of competition typically require a hardwood court facility. Other facility requirements or preferences include bleachers on the ends of the courts, a public space for a concessions stand, public restrooms, a PA system, and a minimum of 40 to 50 foot ceilings.

Other Demand

Other potential user groups such as USSSA Karate/Taekwondo and AAU Gymnastics indicated a low to moderate level of demand for additional facilities in Elmhurst. Martial arts organizations run year round programs, typically with a greater emphasis during the summer months. Competition participants can range in age from 5 to 18 and can attract as many as 300 participants to a single-day competition. They require approximately 20,000 square feet of contiguous space for competitions, with bleacher seating for a couple hundred.

The gymnastics season typically runs from October to May with meets typically requiring at least 20,000 square feet of space to host tournaments, but prefer closer to 40,000 square feet for larger meets and competitions. Each competition is a single-day event and attract participants from 5 to 18 years old. The Wagner Community Center is generally viewed as appropriate venues at which to host most locally held meets and competitions.

Additional demand may be generated through a partnership with IC Prep. This local private Catholic school has largely outgrown their current footprint. Their one on-campus gym is shared between the high school and elementary school, which forces them to rent gymnasium space at Bensenville facilities for both games and practices. They would like access to a facility that offers at least one championship court that can have the seats pulled back to offer up to two practice courts.

Summary of Indoor Court Demand

- Overall demand conclusions:
 - Moderate to strong interest levels measured among potential local indoor facility user groups.
 - Moderate interest levels measured among potential non-local indoor facility user groups.
 - Indoor sports demand tends to run year-round, with somewhat higher concentrations of demand from October through March.
- Local demand observations:
 - Potential exists to accommodate local demand and grow existing events with the addition of court space in Elmhurst. There is a general consensus among local indoor sport organizers that Elmhurst has a lack of overall gym space.
 - IC Prep has outgrown their footprint and is currently sharing their two-court gymnasium facility between their high school and elementary school programs.
 - York High School fieldhouse is able to accommodate most of the existing local demand, though occasionally last-minute cancellations due to conflicting YHS activities can negatively impact local user groups.
- Non-local demand observations:
 - Potential exists to draw state-wide, regional and potentially national tournaments with a facility that has six full-sized basketball courts in Elmhurst.
 - State and regional basketball planners noted the lack of “big box”, multi-court facilities throughout the greater-Chicago metro area, and expressed the notion that the development of a larger indoor court facility so close to O’Hare International Airport would provide an enticing opportunity for hosting tournament and competitions.

Ice Arena Users

Based on national statistics, there are approximately 3.5 million individuals that participated in ice hockey at least once in the past year. Of this amount, approximately 27 percent (nearly 900,000) were considered frequent participants, having participated 25 or more days in the past year. Additionally, on an individual basis, ice/figure skating participation is estimated at approximately 11.6 million, with approximately 9 percent (just under one million people) considered frequent participants.

The Sports and Fitness Industry Association noted that while collectively, youth sports experienced a nine percent decline in participation rates of 6 to 17 year olds, hockey actually has experienced a nearly 44 percent rise in participation from 2009 to 2014. Team and individual participation in ice-related activities varies by region more significantly than most other sports—with higher participation in northern-most states in the country (e.g., Minnesota, Wisconsin, Illinois, Michigan, Massachusetts and New York, among others).

Interviews with local community stakeholders and potential complex users, as well as telephone interviews with regional, state and national youth tournament and competition organizers were conducted to understand the potential need for a new ice arena complex. The summaries below and on the following pages provide insights gained from each key user group/category interviewed for this study.



York Hockey Club



The York Hockey Club (YHC) is a non-profit organization that provides and conducts ice hockey programs for York High School. YHC currently has approximately 40 total players between the Varsity and Junior Varsity teams. Each team's weekly schedule consists of two on-ice practices of approximately an hour and fifteen minutes, one off-ice practice and one or two games (which typically last approximately two hours). Total ice time logged per week averages between 4.5 and 6.5 hours. The season runs from September through February, with playoffs extending into mid-March and a two-week break in games around Thanksgiving and two weeks off at the end of December.

However, since there is no indoor ice available in Elmhurst, both teams are forced to utilize rink space at other venues throughout the area including Addison Ice Arena, Center Ice of DuPage in Glen Ellyn, All Seasons Ice Rinks in Naperville, among others, often starting practice as late as 8:00 or 9:00 at night. Additionally, ice rental rates at some of these facilities can be extremely expensive, which requires a contribution of \$4,100 per player (\$3,100 for goalies) to participate.

York representatives suggest that they would prefer and likely could host all of their activities within a new two-sheet ice rink in Elmhurst.

Fenwick High School Hockey



The Fenwick Hockey Club is a non-profit, independent club hockey program in cooperation and in conjunction and support with Fenwick High School for Fenwick students. The Club currently consists of three boys teams (one Varsity and two Junior Varsity teams) and one girls team, comprised of approximately 20 players per team (there are approximately 80 total participants combined among the four teams). Practices and home games are played at Ridgeland Common Ice Arena in Oak Park and the Edge Ice Arena in Bensenville. The season runs from September through March, during which the Club consumes approximately 13.5 hours of ice time per week for the boys programs and another 3 to 4 hours of ice time weekly for the girls.

Fenwick Hockey representatives have indicated that retaining enough time slots and time slots at appropriate times for games/practices of high school students has become increasingly difficult. Representatives further indicated that they would likely look to shift the majority of their ice time consumption to a new indoor ice complex in Elmhurst. While this shift is not expected to grow their overall program, it would likely retain much of the activity that is currently being held outside of the market.

Elmhurst Chiefs Hockey Club



The Elmhurst Chiefs Hockey Club is a not-for-profit Tier III program that provides recreational hockey for players at all skill levels. There are no tryouts or cuts, with roster spots only limited to space available. All players are evaluated in order to equally balance the skill at those levels with multiple teams. Playing time is balanced so players receive an equal amount of ice time. The season runs from September through March, with two practices during the week and a game on the weekend.

The estimated 200 players are divided up by age group, with approximately 50 U8 players (Mites), 50 U10 players (Squirts), 50 U12 players (Peewees), 20 U14 players (Bantams) and 20 U18 players (Midgets). Practices and games all take place at facilities outside of Elmhurst, including The Edge Ice Arena in Bensenville, the Franklin Park Ice Arena in Franklin Park and the Darien Sportsplex in Darien. It is estimated that the Chiefs consume nearly 1,700 hours of ice rental time per year across these complexes.

The Chiefs would expect to shift as much of their existing operations to a new two-sheet complex in Elmhurst as possible. This complex would provide opportunities to (1) grow the Club by offering additional ice time to people that are turned away, (2) create a girls program, and (3) potentially increase revenues (through the development of in-house run fundraising tournaments, jamborees and other such events) or minimize expenses (through partnerships with local municipalities and other local stakeholders).

Chicago Blues Hockey Club



The Chicago Blues Hockey Club was founded in 1996 and plays in the Tier II classification (somewhat more competitive than Tier III, but not as much of a commitment as Tier I). The Club competes in the Central States Developmental Hockey League and the Northern Illinois Hockey League and skate out of the Edge Ice Arena in Bensenville. The estimated 250 players are divided up among 17 teams, including four U8 teams (Mites), three U10 teams (Squirts), four U12 teams (Peewees), four U14 teams (Bantams) and 2 U18 teams (Midgets).

It is unlikely that the Blues would shift any significant activity away from the Edge Ice Arena to a new ice rink complex in Elmhurst, as their players are not exclusively, or even primarily, from Elmhurst. Nor do they have any difficulty reserving the ice time they need at their preferred time of day.

Chicago Bruins Hockey Club



The Chicago Bruins Hockey Club plays at the Addison Ice Arena and is a non-profit organization that offers both Tier II and Tier III level hockey programs. They are also the only area club organization to offer a dedicated girls hockey program. The Bruins have 27 different teams, including five 8U teams (which play under their affiliate the Addison Grizzlies), six 10U (Squirt) teams, seven 12U (Peewee) teams, five 14U (Bantam) teams, one Girls 14U team and three U18 (Midget) teams. In total, there are over 400 kids participating in Bruins hockey.

It is not likely that the Bruins would shift any significant activity away from the Addison Ice Arena for a new indoor ice rink in Elmhurst.

Potential Non-Local User Groups

Hockey Demand

State and regional ice arena users indicated an overall interest and need for new indoor ice sheets in the greater Chicago area, citing growing participation rates throughout the country as well as the recent success of the Chicago Blackhawks (of the National Hockey League). Organizers typically require at least two NHL-sized (i.e., 200' x 85') ice sheets in order to be able to consider hosting a weekend tournament. Facilities also need a minimum of four locker rooms per sheet of ice, able to accommodate 18 to 20 players. Arena seating should range anywhere between 500 to 1,000 seats to accommodate spectators visiting for the event. Basic needs for a pro-shop and skate sharpening services is a must for any ice arena facility as well as basic concessions. Some ice arenas partner with bar/restaurant businesses; however, these third party food and beverage business propositions can often be challenging with facilities with variable and specific demographic demand such as ice arenas or similar sports/recreation facilities. The ultimate site/location and adjacency to other customer bases is typically important for this type of partnership possibility.

Tournament organizers such as 200'x85' Tournaments, MyTournaments, Ultimate Hockey Tournaments, and Canlan Classic Tournaments all indicated an interest in organizing and hosting anywhere from five to

ten local and regional tournaments with approximately 25 to 50 teams or more. Importantly, the quantity and quality of existing local hockey clubs and programs suggest a strong base from which to be able to develop a following for tournaments that would be expected to attract a significant base of non-local teams. Importantly, these different clubs can provide opportunities not only to market to varying levels of competition, age ranges and gender, but also could provide a significant base of volunteers to help organize and run tournaments. Further, it is important to recognize that there is a significant base of surrounding hockey clubs and programs throughout the Chicago metropolitan area.

Figure Skating & Skate School Demand

Ice skating users tend to place the most importance of the availability of ice and the location of the venue when considering a facility for hosting programs, competitions, meets and learn-to-skate programs. Regional and national competition organizers noted more limited demand in terms of hosting a competition at a potential new ice arena in Elmhurst, though local figure skating and skate school users gave insight that it would be beneficial for local programming and competitions.

Skate schools tend to cater towards a younger membership base, as they help strengthen the skills of young skaters to go on into more difficult ice skating sports such as figure skating and hockey. Typically, skate schools are operated by a park district, private entity, or a sponsored organization. While Elmhurst already has one outdoor ice rink at the YMCA, an indoor arena could open some doors for younger skaters who may not be able to skate outdoors in inclement weather conditions and during non-winter time periods. Peak seasons run during the winter and indoor arenas are essential to successful skate schools. Typically, skate schools during peak season can attract a couple hundred children, or more, while during the summer smaller programs are run for individual skill building, which tend to be much more sparsely attended.

Curling/Other Demand

Curling organizations indicated a lower demand among surveyed organizations. The indication for most utilization from curling users was from the local users via in-house leagues. Curling is a slowly growing sport that is often overshadowed by other ice users such as hockey and figure skating. Curling can be hosted on an ice sheet that does offer hockey and traditional skating as well, as long as the ice is well taken care of. Curling typically needs less space than a typically ice sheet, with a length of approximately 150 feet and backboards to prevent curling stones from drifting too far. However, there are a few problems that occur when trying to combine curling and ice skating, including ice management. Ice skating damages the ice leaving deep gouges in place that take time to repair, and typically there is not enough time during transition between sports for the healing process, leaving curlers to utilize less than optimal surfaces. Additionally, the lines and markers for curling must be imprinted below the ice, and do not always fit in well with traditional hockey lines.

Summary of Ice Arena Demand

- Overall demand conclusions:
 - Strong interest levels measured among local hockey programs that are currently forced to practice and play outside of the city of Elmhurst.
 - Moderate interest levels were noted for hosting state, regional and/or national tournaments. Elmhurst's proximity to O'Hare International Airport provides an opportunity to market to, and attract tournament participants from around the world.
 - Figure skating and skate-school programs tend to be more driven by the overall demographics of the market.
- Local demand observations:
 - Demand exists among local hockey clubs that are forced to utilize facilities outside of Elmhurst for practices, games and clinics.
 - The Elmhurst Chiefs, York Hockey Club, Fenwick Hockey Club and others could provide regular and consistent usage of an indoor ice rink.
 - Additional fill-in usage can come from local learn-to-skate programs, figure skating programs, open skate and other activities.
- Non-local demand observations:
 - Potential exists to host five to ten state, regional and potentially national tournaments in Elmhurst.
 - Presence of surrounding established facilities such as the Edge Ice Arena and the Addison Ice arena, suggest that a strong marketing strategy may be required to ensure that tournaments select an Elmhurst venue over others in the market.

Indoor Turf Users

Indoor turf facilities are becoming increasingly more relevant as an indoor sports facility in the northern states throughout the country. These venues can provide indoor practice space for times when inclement weather would have otherwise forced the cancellation of practice. Further, the continued growth in interest and participation rates among outdoor sports such as soccer, lacrosse, rugby and others, tend to encourage access to facilities of this nature.

Many indoor facilities at athletic complexes are constructed to be multipurpose in nature, being flexible to host and accommodate a number of varying sports, recreation and other indoor activities. Oftentimes, indoor turf can also accommodate basketball, volleyball, dance, martial arts and other gymnasium type sports with the assistance of portable hard court or sport court.

A process of in-depth telephone interviews and extensive research was also completed to estimate the amount of existing facility usage and potential unmet demand among local and non-local indoor turf users. These findings are summarized on the following pages.



Team Elmhurst Soccer Club



Team Elmhurst Soccer Club (TESC) is a non-profit organization focused on player development of kids 6 to 18 years old. Team Elmhurst Select teams play in a division in the top 25 percent of their age group, while Team Elmhurst Premier plays in a division in the second 25 percent. Team Elmhurst Travel accommodates the remaining teams from a competition standpoint.

There are more than 400 boys and girls playing on one of 34 teams during the indoor season, which runs from November through mid-March. Teams have one training session per week and play one game per week, renting out indoor turf space Monday through Thursday for approximately five hours per night.

TESC has increasingly struggled to find enough indoor turf space to accommodate their winter programs and would welcome a new complex. They prefer to play games on a 60 yard x 40 yard field (approximately 180' x 120'), and noted that that the four 170' x 120' fields at Max McCook Athletic and Exposition Center have worked well for them in the past.

Elmhurst FC Soccer/AYSO Region 399



The Elmhurst FC Soccer Club is an extension of the American Youth Soccer Organization (AYSO) Region 399 soccer program as the signature travel program for players seeking a higher level of competition. AYSO currently has approximately 1,600 boys and girls playing on nearly 200 different teams. Elmhurst FC fields teams from ages 8 to 14, practicing twice a week with typically one game on the weekend. The club currently participates in a 15-team winter league at the Westmont Yard and utilizes the Grasshopper Indoor Soccer Facility for approximately 10 to 12 hours per week for practices. These indoor practice sessions run for around 15 weeks during the winter indoor soccer season from November through March.



Typical tournaments the club participates in will have up to 15 teams and over 300 participants. The organization indicated a strong interest in a new multipurpose indoor turf facility in Elmhurst to accommodate for a growing need for indoor turf facilities in the greater Chicago region as indoor soccer is growing in popularity, and the availability for turf time is becoming more limited.

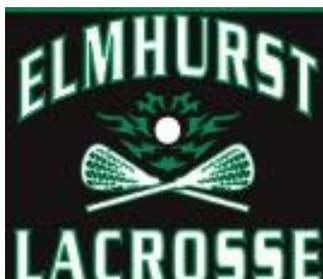
Elmhurst Eagles Football and Cheer



The Elmhurst Eagles is a youth football and cheerleading organization that was founded in 1964. An estimated 400 kids participate within 13 football teams and six cheer squads. The football program is offered to kids between 7 and 14 years old with teams consisting of 18 to 24 kids per team. The season typically runs from August through October, with playoffs extending into early November. Teams practice four or five times per week in August until school starts and then three to four times per week during the school year, and play nine games plus playoffs. One practice per week is currently held indoors at York High School. Cheer squads practice on a similar schedule and attend all home and away games. Additionally, all but the youngest cheer squad attend two annual competitions (the youngest squad attends just one).

The greatest area of need for the Eagles programs are the once weekly indoor practice and an available venue for practice during inclement weather. Additionally, Eagles Football would consider developing an indoor 7v7 league, an indoor flag football tournament during the winter/spring months, and/or a two-week clinic in early spring.

Elmhurst Lacrosse



Elmhurst Lacrosse is a non-profit organization with approximately 400 total players between 7 and 14 years old, with approximately one-third of players being girls. The season runs from the beginning of April through early June; however, there are two weekends in January/February during which Elmhurst Lacrosse hosts indoor clinics/camps at York High School's fieldhouse. They have occasionally used indoor turf facilities at Westmont Yard Indoor Sports Complex in Westmont and the Odeum Expo Center in Villa Park for "tune-ups" prior to the start of the season; however, they have not regularly used these, or other, facilities.

They could hold 4v4 or 5v5 games indoors during March to begin spring practices earlier and would consider offering a winter skills program, in addition to the two weekend clinics they currently offer. Should an indoor turf facility be made available in Elmhurst they would likely relocate as much of their existing, and potentially new utilization to the facility to be closer to their participants.

Elmhurst Youth Baseball



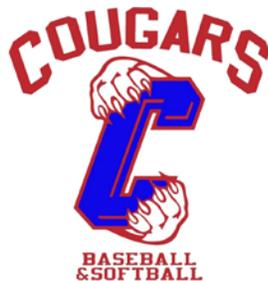
The Elmhurst Extreme is a full-time travel baseball program affiliated with Elmhurst Youth Baseball (EYB), fielding six teams for kids age 9 to 14. The Extreme teams generally play a 30 to 60 game schedule between league and tournament games. Winter workouts start in January, with games starting in April and going through July. They currently utilize York High School's fieldhouse for winter practices; however, they would prefer a turf facility with high ceilings (30 to 35 feet minimum), a curtaining system and dropdown batting cages. While a new indoor turf facility in Elmhurst is not likely to increase their usage, EYB may provide a regular source of utilization.

Elmhurst Baseball and Softball League (Explosion and Emeralds)



The Elmhurst Baseball and Softball League offers local recreational league play for Elmhurst residents with eight teams of kids between the ages of 5 and 16. Additionally, they offer a more competitive travel baseball program (Elmhurst Explosion) and softball program (Emeralds), each of whom field one team each that practice twice a week, for two hours per practice from December through March. League representatives indicated that they utilize a variety of facilities, but would definitely prefer to host these practices at an indoor turf facility in Elmhurst. Key facility elements they recommend include as many batting cages as possible, pitching machines for each, 35' ceilings and dropdown curtains to separate practice spaces.

Elmhurst Cougars Baseball and Softball



The Cougar Baseball and Softball Club is an independent organization of traveling teams from the western suburbs of Chicago formed in 1992 as the original travel teams for Elmhurst. They have expanded to encourage participation from players throughout northern Illinois. Practices begin in January, with the 40 to 60 game season running from April through July. League representatives indicated a desire for indoor turf training facilities for January through March practices, with potential inclement weather practice facilities in April and May. The Cougars have 11 teams with kids ranging from 9 to 18 years old.

Non-Local User Group Summary

Soccer Demand

Generally, state and regional indoor turf users expressed a need for additional facilities in the greater Chicago area. Chicagoland Indoor Soccer Club expressed interest in organizing and sponsoring in-house leagues and tournaments at any new proposed indoor turf facility in Elmhurst, while other existing local soccer user groups were also optimistic about the opportunity to utilize and program an indoor turf facility. Travel teams such as Elmhurst FC indicated a need for potential practice space, as the only indoor practice space for indoor turf users of Elmhurst is out of town.

Soccer organizations typically require a full-sized field (185'x75') to host games, tournaments, and other types of competitions. Ideally, tournament organizers prefer to have at least two full-sized fields in order to play concurrent games, but due to a lack of large contiguous indoor fields in the greater Chicago area, many organizations have been able to host tournaments with one indoor field. Outer glass on turf fields is preferred to divide and create lower levels of noise for the on-field players.

Lacrosse Demand

Lacrosse is generally a spring and summertime sport; however, tournament and league organizers did express interest in a potential new facility in Elmhurst. Lack of overall turf size at an indoor facility due to inclement weather or for the winter season was the highest driver for utilization. If a new indoor turf facility were to be constructed, it would need to have a large enough turf size to accommodate a full-size lacrosse field in order to host tournaments.

New Wave Lacrosse indicated the growing popularity of lacrosse as a sport and the future need for indoor turf facilities that may accommodate them. It was indicated that in general, for both boys and girls lacrosse that a need for a new facility in the greater Chicago area is needed to accommodate for demand as the market's current indoor turf facilities are nearly over-booked.

Other Indoor Turf User Demand

Other indoor turf users included multipurpose group such as the Parisi Speed School, the Bull-Sox Youth Academy and other local baseball, softball and football organizations. Representatives of these organizations indicated an interest in a potential indoor turf facility in Elmhurst. Most usage would come from partnerships from the organizations allowing them to host indoor classes and sports training programs ranging from three to 8 classes concurrently with anywhere from four to 15 participants per class. These programs would aid local sports teams as well as filling gaps in the facility when other users are not utilizing it.

Possible ways to maximize alternative usage of indoor turf space are to pursue partnerships with organizations such as the Parisi Speed School, and other youth development and sport training programs. Name recognition of well-known programs help marketability and may aid in drawing participants to a new indoor turf facility. Many of these programs will also require an alternative multipurpose training area with sport court or a small fitness area with weights and other types of equipment.

Summary of Indoor Turf Demand

- Overall demand conclusions:
 - Overall moderate to high level of demand for soccer, lacrosse and other users of indoor turf facilities.
 - In-house leagues, programs and sport specific classes, and travel tournaments would provide the majority of usage at an indoor turf facility.
 - Majority of turf specific utilization occurs during the winter months; as inclement weather prevents outdoor activities.
- Local demand observations:
 - Moderate to strong local interest levels among potential indoor turf facility user groups.
 - Demand for local indoor practice facility space among spring sports user groups relatively strong, as there is little to no access to indoor turf facilities in Elmhurst—organizations are forced to utilize venues throughout the region for practices and games.
 - Demand among league and tournament organizers somewhat more moderate.
 - Typically, indoor youth leagues vary from 10 to 12 teams per league with 12 to 15 players per team.
- Non-local demand observations:
 - Somewhat more limited demand for tournament and/or competition space.
 - Demand for indoor turf space tends to be more locally oriented. However, opportunities exist to host some tournaments/competitions based on the strength of the existing local user groups.

Aquatic Users

Swimming is the leading individual sport in the U.S. Nationwide, there are approximately 45.5 million individuals who are characterized as “fitness” swimmers and 2.4 million individuals that swam competitively at least once within the past year. Of these amounts, approximately six percent (2.7 million) were considered frequent participants, having swum more than 100 times in the last year. Of the 2.4 million competitive swimmers, approximately 37 percent (882,000) were considered frequent participants, having participated 100 or more days in the last year. Approximately 50 percent (23.0 million) of “fitness” swimmers and 63 percent (1.5 million) competitive swimmers participated at least 50 times.

The following summaries detail insights that were collected from conducting in-depth phone interviews with potential local and non-local users of new Elmhurst aquatic facilities.



Elmhurst Swim Team



The Elmhurst Swim Team (EST) is a year round swim team. EST has a short course (25-yard) fall/winter swim season and a hybrid long course (25-yard at home, 50-meter at away meets) summer swim season. The fall/winter season is one season that begins in October and ends in March. Stroke Clinics are held before each season. Registration is open to all in the Elmhurst community and in the surrounding communities.

The fall/winter season includes a collection of home dual meets or time trials and a number of away meets. The season culminates with a conference meet that is open to all swimmers and with regional, state, and national meets for swimmers with qualifying times.

The summer season is one session. It begins at the end of the school year, approximately first week of June, and runs through mid- to late-July. Swimmers generally practice Monday through Thursday at York High School. Summer includes all home meets. The season culminates with a conference meet that is open to all swimmers and with regional, state, zone and national meets for swimmers with qualifying times.

EST typically maintains a registered base of between 200 and 250 swimmers. It is estimated that approximately 80 percent are Elmhurst residents. A flat fee is charged per swimmer per session. All practices and home meets occur at York High School. EST has contracted with York for swimming pool practice use between 5:00pm to 7:00pm weekdays. Meets are typically on the weekends, with most away meets hosted within relatively nearby driving distances.

Based on conversations with EST leadership, EST is happy with its practice, use and rental arrangement with York High School and would be unlikely to leave York (as its primary practice facility) for any new natatorium/aquatic facility if it were built. EST could possibly hold, or participate in, a limited number of meets at a potential new facility. However, at this time, EST should not be considered as a potential primary tenant for any new Elmhurst Indoor Facility should it have an aquatic focus.

British Swim School Elmhurst



The British Swim School is a national organization that offers swimming lessons in smaller communities, such as Elmhurst. They offer programs for all ages, starting at three months to 18 years of age as well as programs designated for adults 18 years and older. The organization oversees over 1,000 participants per year with weekly lessons offered Monday through Sunday, averaging one instructor for every four participants. The British Swim School currently utilizes hotel and private health club pools for its lessons.

Registration trends have been steadily growing in recent years and representatives believe they will soon outgrow their current facilities. With soon-to-be unmet demand needs, Swim School representatives indicated an interest in utilizing a new pool/natatorium facility in Elmhurst with specific pool and/or facility specifications.

Non-Local User Group Summary

Generally, regional, state and national swimming organizations expressed a high need and demand for a 50-meter aquatic facility in the state of Illinois. Lack of 50-meter pools in the greater Chicago region have created a void and demand for a new potential aquatic facility. Illinois Swimming and USA Swimming both expressed interest in hosting and organizing tournaments in Elmhurst should a 50-meter pool facility be built. Potential to host one to two 1,000 participant state, regional or national level competition events are feasible due to a lack of facilities in the Elmhurst area. However, the planned aquatic center development in Westmont would be expected to result in a high quality, competitive 50-meter pool plus secondary pool that should be the recipient of some of this pent up demand.

Summary of Aquatic Facility Demand

- Overall demand conclusions:
 - Low to moderate interest levels measured among potential swimming user groups.
- Local demand observations:
 - Majority of local user groups can be accommodated within York High School or other area pools.
 - Some pent-up demand exists for another municipally operated swimming pool.
 - Limited demand for a new 50-meter indoor pool.
- Non-local demand observations:
 - Development of a 50-meter pool with floating bulkheads could attract two or three state, regional or national competitions. These competitions would be expected to host between 500 (state-meet) and 1,100 (national competition) athletes.
 - Careful consideration of this option is necessary, considering the pending development of a new 50-meter competition pool in Westmont.

Conclusions

The results of the market demand analysis conducted for this study suggest that strong estimated local and non-local demand exists for a gymnasium sports and recreation facility and for an ice sports and recreation facility. The largest accumulation of indoor court spaces is at York High School's fieldhouse, and they are becoming increasingly difficult to access. Developing a minimum four-court facility would be able to accommodate latent local demand. However, in order to attract the larger, non-local tournaments for which demand was also noted, a larger facility (minimum six courts) would be required.

In terms of demand for ice rink space, the only existing local facility is the outdoor rink at the YMCA. All locally-based club hockey, figure skating, learn-to-skate and other ice rink user groups are forced to utilize facilities outside of Elmhurst. Demand was noted for a two-sheet ice facility to accommodate both local and potential non-local tournament, camp and/or clinic activity. Clubs such as York, Fenwick and the Chiefs would all welcome an opportunity to practice and play home games in Elmhurst.

An important consideration in the site selection process for an ice facility, should the decision be made to move forward with developing an ice arena, will be to allow for potentially developing a third sheet of ice at some point in the future. Current demand indicates a two-sheet facility; however, anticipated future growth in local club, figure skating and other programs may eventually require access to a third sheet of ice.

Moderately strong local and non-local demand was noted for an indoor turf facility, as well as for an indoor pool/natatorium. The only existing indoor turf facility in Elmhurst is not large enough to accommodate practice, game, training and other demand. York High School's fieldhouse has served demand well; however, increasingly organizations are looking for a turf field experience for practices and games, and try to avoid practicing on hardwood. As such, these organizations are currently forced to seek indoor turf space outside of Elmhurst city limits.

The Elmhurst and greater Chicago metropolitan area also both presently have limited facility options for swimming. Specifically, there are three 25-yard pools in Elmhurst, but no competition-ready 50-meter pool. Increasingly swim clubs and programs seek out 50-meter pools to be able to host long-course events, as well as short-course by swimming cross pool, rather than along the long axis. York High School currently offers an indoor 25-yard pool that is fairly well maintained and capable of hosting many locally-based events.

Importantly, there is a proposed aquatic center project in Westmont, Illinois that is currently being considered. The development would consist of a 50-meter competition pool and supporting leisure pool in conjunction with an apartment complex. Should this project move forward, it would present a significantly competitive venue for attracting high-profile state, regional and national meets and competitions. However, even if this project were not to move forward, the local demand was not identified as being sufficient to be able to support operations of a 50-meter pool. York High School swimming and Elmhurst Swim Club did not indicate an interest to relocate to a new facility, even if the facility was of a higher quality than their pool. Other swim clubs and programs have noted a desire for additional pool space and time; however, none of these organizations likely have the financial wherewithal to contribute significantly to construction costs and/or ongoing operations.

6.0 FACILITY PROGRAM AND UTILIZATION ANALYSIS

The purpose of this chapter is to build off the market demand research, analysis and conclusions related to a potential new Elmhurst Indoor Sports Facility to evaluate market indicated facility development options and subsequent induced utilization. Recommendations regarding potential facility components and other aspects evaluated in this chapter are based on the results of the market analysis, including the historical, current and projected demographic and socioeconomic characteristics of the market area, an assessment of existing sports and recreation facilities in the marketplace, characteristics of comparable sports facility developments throughout the country, and discussions with potential users of a new Elmhurst Indoor Sports Facility.

Market Supportable Facilities

Based on the results of in-depth interviews with individuals representing local, regional and national sports organizations, as well as discussions with local project stakeholders, the demographic and socioeconomic characteristics of the local and regional market and current participation levels in youth sports, it is estimated that there are three categories of indoor facilities within the Elmhurst market with demand that could fit the needs of the local and regional community. It is recommended that the complex focus on one of the three types of facilities or a combination of two to maximize potential user engagement. The types of facilities with the most demand, are ice complexes, court space, and indoor turf. These types of facilities require specific building direction and amenities and those specifications are outlined below.

1. Ice Arena Facility

- Two sheets (NHL-sized, 200' x 85'), seating for 1,500 and 250.
- Four to six locker rooms.
- Basic additional characteristics/amenities:
 - Pro-shop.
 - Concession facilities.
 - Warm-up areas.
 - Approximate 60,000-square foot facility.

2. Gymnasium Facility

- Six hardwood courts (6 basketball courts, 12 volleyball courts).
- Concession facilities.
- Bleachers, netting equipment, scoreboards, and other standard amenities.
- Approximate 80,000-square foot facility (with approximately 60,000 square feet of floor space).

3. Indoor Turf Facilities

- Two full sized fields (185' x75' or 180' x 80', configurable down to smaller fields).
- Minimum 30' ceiling height.
- Dropdown batting cages for baseball/softball.
- Approximate 40,000-square foot facility.

Building on these market supportable program findings and based on conversations with the study group (representatives of the Elmhurst Park District and the City of Elmhurst), the following three facility scenarios were identified for further analysis:

- Scenario 1: Hardcourt Sportsplex
- Scenario 2: Hardcourt Sportsplex Plus Turf
- Scenario 3: Ice Complex

Scenarios 1 and 2 involve a potential Indoor Sports Facility that is focused around a facility with a hardwood sports surface, with Scenario 2 consisting of a larger facility with an added area of turf space. Scenario 3 would represent an ice complex only, with two sheets of ice.

Estimated Utilization

A detailed utilization model was developed to consider a large number of variables and inputs to analyze each sport/use for each facility development scenario under review. For instance, when considering different types of usage (i.e., use from local leagues/clubs versus non-local tournaments/meets versus clinics/camps/lessons versus open recreation, etc.), separate assumptions were used for the development of usage and attendance (participants and spectators).

As an initial step in assessing the projected utilization associated with a potential Elmhurst Indoor Sports Facility, a detailed analysis was conducted to estimate existing use, participation and attendance for each potential development scenarios under consideration. Next, based on discussions with local sports organizations, regional and national tournament organizers, a review of sports participation trends, and a review of the historical utilization levels of comparable facilities we have developed an estimation of incremental induced market demand for the recommended Indoor Sports Facility in Elmhurst, assuming the program scenarios as previously outlined.

This analysis focuses on the net inducement of new/expanded local and non-local sports league and tournament play in Elmhurst by virtue of the development of the proposed new Indoor Sports Facility as outlined earlier in this chapter. A portion of this new induced market will be accommodated at the new Indoor Sports Facility, while others will be accommodated at other local facilities through the assumption of new periods of availability as some existing demand shifts to the new facility. Therefore, the incremental induced demand reflects the net effect in the Elmhurst marketplace as a result of the recommended Indoor Sports Facility development and annual operation.

The utilization assumptions assume the facility is managed by professional, competent and experience facility management personnel that will promote events in keeping with the Park District's and City's goals of community involvement and economic impact.

Based on the results of the analysis, Exhibit 1 presents a summary of estimated utilization and attendance by identified scenario. Estimates relate to a stabilized year of operations (assumed to represent the fourth full year of operations).

Exhibit 1
Estimated Utilization and Attendance by Scenario

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
Tournaments			
Annual Tournaments	30	40	16
Average Teams per Tournament	32	28	14
Total Annual Teams	960	1,120	224
Players Per Team	10	12	18
Spectators Per Player	2.0	2.0	2.0
Average Days Per Tournament	2.1	2.1	2.1
Total Annual Attendance	60,480	84,672	25,402
Percent Elmhurst Teams/Residents	40%	40%	40%
Percent Non-Resident Day Trippers	25%	25%	25%
Percent Non-Residents Overnight Stay	35%	35%	35%
Total Elmhurst Resident Attendance	24,192	33,869	10,161
Total Day Trippers	15,120	21,168	6,350
Total Overnight Guests	21,168	29,635	8,891
Leagues			
Number of League Sessions	24	32	--
Avg. Number of Teams per Session	24	22	--
Total Annual Teams	576	704	--
Games Per Session	10	10	--
Total Annual Team Games	5,760	7,040	--
Players Per Team	10	12	--
Spectators Per Player	0.5	0.5	--
Total Annual Attendance	86,400	126,720	--
Number of League Hours	--	--	4,400
Avg. Participants & Spectators Per Hour	--	--	35
Total Annual Attendance	--	--	154,000
Percent Elmhurst Residents	60%	60%	60%
Percent Non-Resident Day Trippers	40%	40%	40%
Percent Non-Residents Overnight Stay	0%	0%	0%
Total Elmhurst Resident Attendance	51,840	76,032	92,400
Total Day Trippers	34,560	50,688	61,600
Total Overnight Guests	0	0	0
Lessons/Clinics/Misc.			
Number of Hours	4,500	5,700	4,000
Avg. Participants & Spectators Per Hour	15	15	15
Total Annual Attendance	67,500	85,500	60,000
Percent Elmhurst Residents	60%	60%	60%
Percent Non-Resident Day Trippers	30%	30%	30%
Percent Non-Residents Overnight Stay	10%	10%	10%
Total Elmhurst Resident Attendance	40,500	51,300	36,000
Total Day Trippers	20,250	25,650	18,000
Total Overnight Guests	6,750	8,550	6,000



Exhibit 2 presents a summary of total estimated attendance and attendee origin associated with the three identified development scenarios. As shown, upon stabilization (assumed fourth year of operations), the potential new Elmhurst Indoor Sports Facility is estimated to attract between 214,000 and 297,000 attendees annually, depending on scenario. While each scenario is expected to generate significant visitation and new hotel room nights for Elmhurst through non-local activity, more than half of the estimated attendance under each scenarios is expected to consist of utilization by Elmhurst residents.

**Exhibit 2
Total Estimated Attendance by Scenario**

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
ESTIMATED ATTENDANCE			
Local:			
Elmhurst Residents	116,532	161,201	138,561
Non-Local:			
Non-Resident Day Trippers (Tournaments)	15,120	21,168	6,350
Non-Resident Day Trippers (Other)	54,810	76,338	79,600
Non-Resident Overnight Stay	<u>27,918</u>	<u>38,185</u>	<u>14,891</u>
Total Attendance	214,380	296,892	239,402
ESTIMATED HOTEL ROOMS			
Total Hotel Room Nights	11,167	15,274	5,956

Note: 'Other' Day Trippers refers to non-Elmhurst resident attendees of leagues, lessons, clinics, etc.



7.0 COST/BENEFIT ANALYSIS

Based on the results of the market demand and utilization analysis, a cost/benefit analysis was conducted relating to potential construction and operating costs and estimated economic impacts associated with each of the three identified scenarios for a new Elmhurst Indoor Sports Facility. A detailed utilization, economic and financial model was developed to consider a large number of variables and inputs to analyze each sport/use for each facility component under review. For instance, when considering different types of usage (i.e., use from local leagues/clubs versus non-local tournaments/meets versus clinics/camps/lessons versus open recreation, etc.), separate assumptions were used for the development of usage, attendance, rates, fees, and in- and out-of-facility spending estimates.

Estimated Costs

The purpose of this section is to estimate the key costs (operating and construction) associated with a potential new Elmhurst Indoor Sports Facility. Estimates are presented in 2016 dollars.

Financial Operations

An analysis of estimated operating revenues and expenses associated with each of the three identified scenarios for a potential new Elmhurst Indoor Sports Facility was conducted. Since detailed facility design, configuration and cost estimates have not yet been completed, the assumptions used in this analysis are based on the results of the market analysis, industry trends, knowledge of the marketplace and financial results from comparable facilities. Additional physical development planning must be completed before more precise estimations of the potential Indoor Sports Facility's operating costs can be made, and likewise, estimates of construction costs. Also, upon completion of further planning, revenue and expense assumptions should be updated to reflect changes to the assumptions made herein. These changes could significantly affect the analysis of future operating results.

This presentation is designed to assist project representatives in estimating the financial attributes of the potential new Elmhurst Indoor Sports Facility and cannot be considered to be a presentation of expected future results. Accordingly, this analysis may not be useful for any other purpose. The assumptions disclosed herein are not all inclusive, but are those deemed to be significant; however, there will be differences between estimated and actual results, because events and circumstances frequently do not occur as expected, and these differences may be material.

The majority of major sports and recreation facilities of this nature involve public sector funding participation (both in terms of construction and operations). Most of the facilities throughout the country similar to each of the three scenarios identified herein operate at an annual financial deficit. Non-operating direct support could come from a variety of sources including public sector support (i.e. general funds, dedicated tax proceeds, etc.), grants, philanthropy and other such sources. A typical cost recovery for comparable indoor sports/rec facilities ranges between 50 to 70 percent of total operating costs.

Those indoor sports facilities that are privately-owned and operated throughout the country typically employ unique marketing and booking strategies that maximize operating revenue and minimize operating expenses. For instance, most offer significant in-house programming, clinics, lessons and other such activities. These facilities also tend not to pursue and accommodate significant non-local

tournaments/competitions/meets, thereby resulting in lower economic impact generation for the local community, nor do they typically offer affordable usage for open recreation, schools or non-profits.

Operating revenues and expenses for a potential new Elmhurst Indoor Sports Facility have been estimated for the three scenarios. Exhibit 1 presents the estimated annual financial operating results for the potential new Elmhurst Indoor Sports Facility for a stabilized year of operations (assumed to occur by the fourth full year of operations), presented in 2016 dollars. Additionally, the estimates below do not include any "non-operating" items, such as debt service or capital repair/replacement funding.

Exhibit 1
Estimated Annual Financial Operating Results by Scenario
(stabilized year of operation, in 2016 dollars)

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
Operating Revenues			
League, Practice, Rec Rentals	\$812,000	\$1,047,000	\$975,000
Tournament Rental Income	\$247,000	\$324,000	\$130,000
Camps and Clinics	\$188,000	\$254,000	\$188,000
Sponsorship	\$260,000	\$296,000	\$200,000
Concessions (Net)	\$302,000	\$380,000	\$295,000
Other Revenue	\$50,000	\$75,000	\$135,000
Total Operating Revenues	\$1,859,000	\$2,376,000	\$1,923,000
Operating Expenses			
Salaries & Wages	\$434,000	\$556,000	\$475,000
League Operations/Programming	\$311,000	\$392,000	\$220,000
Utilities	\$294,000	\$347,000	\$610,000
Repairs & Maintenance	\$137,000	\$182,000	\$240,000
Materials and Supplies	\$98,000	\$134,000	\$150,000
Insurance	\$274,000	\$301,000	\$280,000
General & Administrative	\$162,000	\$194,000	\$150,000
Total Operating Expenses	\$1,710,000	\$2,106,000	\$2,125,000
Net Operating Profit/(Loss)	\$149,000	\$270,000	(\$202,000)

As shown in the exhibit, upon stabilization and not including debt service, a potential new Elmhurst Indoor Sports Facility (under Scenarios 1 and 2) is estimated to generate an operating profit of approximately \$149,000 and \$270,000 per annum, respectively. Under Scenario 3, a potential new Elmhurst Indoor Sports Facility (consisting of a two-sheet ice complex) is estimated to generate an annual operating loss of approximately \$202,000 per annum. This type of annual operating loss is consistent with or better than comparable ice arena facilities located throughout the country.



Construction Costs

An analysis was conducted associated with order-of-magnitude hard construction costs pursuant to the supportable building program elements presented earlier herein. Site costs (acquisition and preparation) have not be included in this analysis.

Construction costs tend to vary widely among comparable sports facility 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. Importantly, a detailed architectural concept, design and costing study would be required to specifically estimate construction costs for a potential Elmhurst Indoor Sports Facility.

Exhibit 2 presents a summary of assumed construction costs associated with each of the development scenarios considered for this study.

Exhibit 2
Hypothetical Order-of-Magnitude Construction Costs by Scenario
(in 2016 dollars)

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
Construction Costs (order-of-magnitude, excluding site)			
<i>Gross square feet</i>	100,000	150,000	85,000
<i>Cost per GSF</i>	\$175	\$165	\$215
<i>Soft cost rate</i>	30%	30%	30%
Hard costs	\$17,500,000	\$24,750,000	\$18,275,000
Soft costs	\$5,250,000	\$7,425,000	\$5,482,500
Total construction	\$22,750,000	\$32,175,000	\$23,757,500

Order-of-magnitude construction costs (excluding site costs) for a potential Elmhurst Indoor Sports Facility are estimated to range between \$22.8 million and \$32.2 million (in 2016 dollars).

Estimated Benefits

While many of the perceived benefits of a potential Elmhurst Indoor Sports Facility are intangible, including providing enhanced sports and recreation participation opportunities for local youths and stimulating community pride among other qualitative benefits, the annual operations of the potential Indoor Sports Facility can provide quantifiable benefits to an area. Specifically, the annually recurring impacts of an amateur sports and recreation facility begin with the initial direct spending made during operations related to participant fees, camps, clinics, facility rentals, concessions, advertising and other income as well as expenditures made before and after events throughout local hotels, restaurants, retail, entertainment and other establishments.

Direct Spending

The operation of a state-of-the-industry sports and recreation facility can impact the local economy in a variety of ways. Initial direct spending is generated during construction on materials and labor and during operations at events on registration fees, facility rentals, concessions and advertising, as well as before and after events throughout local hotel, restaurant, retail and other establishments.

In order to estimate the incremental economic impact benefits generated to the local economy, certain adjustments must be made to initial direct spending to reflect the fact that all spending is not likely to impact the local economy. Adjustments must be made to account for the fact that a certain amount of spending associated with the potential Facility will be made by local residents and, therefore, likely represents money already spent in the economy in another form. This phenomenon is called displacement and reduces the overall net new impacts. This type of spending is not considered net new to the local economy. Additionally, not all spending associated with the potential Facility will take place in the local economy. A portion of this spending is likely to occur outside the immediate area. This phenomenon is called leakage and reduces the overall impact.

The economic impacts presented in this section represent the estimated net new impacts associated with a potential Elmhurst Indoor Sports Facility.

Multiplier Effects

Economic impacts associated with the potential Facility will likely be further increased through re-spending of the net new direct spending. The total impact is estimated by applying an economic multiplier to initial direct spending to account for the total economic impact. The total output multiplier is used to estimate the aggregate total spending that takes place beginning with the direct spending and continuing through each successive round of re-spending.

Successive rounds of re-spending are generally discussed in terms of their indirect and induced effects on the area economy. Each is discussed in more detail as follows:

- Indirect effects consist of the re-spending of the initial or direct expenditures. These indirect impacts extend further as the dollars constituting the direct expenditures continue to change hands. This process, in principle, could continue indefinitely. However, recipients of these expenditures may spend all or part of it on goods and services outside the market area, put part of these earnings into savings, or pay taxes. This spending halts the process of subsequent expenditure flows and does not generate additional spending or impact within the community after a period of time. This progression is termed leakage and reduces the overall economic impact. Indirect impacts occur in a number of areas including the following:
 - wholesale industry as purchases of food and merchandise products are made;
 - transportation industry as the products are shipped from purchaser to buyer;
 - manufacturing industry as products used to service the sports and recreation facility, sports franchise(s), vendors and others are produced;
 - utility industry as the power to produce goods and services is consumed; and
 - other such industries.
- Induced effects consist of the positive changes in spending, employment, earnings and tax collections generated by personal income associated with the operations of a sports facility.

Specifically, as the economic impact process continues, wages and salaries are earned, increased employment and population are generated, and spending occurs in virtually all business, household and governmental sectors. This represents the induced spending impacts generated by direct expenditures.

The appropriate multipliers to be used are dependent upon certain regional characteristics and also the nature of the expenditure. An area which is capable of producing a wide range of goods and services within its border will have high multipliers, a positive correlation existing between the self-sufficiency of an area's economy and the higher probability of re-spending occurring within the region. If a high proportion of the expenditures must be imported from another geographical region, lower multipliers will result. The multiplier estimates used in this analysis are based on the IMPLAN system, which is currently used by hundreds of universities and government entities throughout the country. IMPLAN is a computer program that performs regional input-output analysis based on approximately 530 industry interrelationships.

Estimated Economic Impacts

Exhibit 3 presents the estimated annual economic impacts associated with the three identified development scenarios for a potential Elmhurst Indoor Sports Facility.

**Exhibit 3
Estimated Annual Economic Impact by Scenario
(stabilized year of operations, in 2016 dollars)**

	SCENARIO 1 Hardcourt Sportsplex	SCENARIO 2 Hardcourt Plus Turf	SCENARIO 3 Ice Complex
Direct Spending by Type			
Hotel	\$1,908,036	\$2,645,978	\$1,966,399
Restaurant/Meals	3,816,072	5,291,957	3,932,797
Entertainment/Leisure	513,702	712,379	529,415
Retail/Shopping	880,632	1,221,221	907,569
Other	<u>220,158</u>	<u>305,305</u>	<u>226,892</u>
Total	\$7,338,600	\$10,176,840	\$7,563,072
Indirect/Induced Spending	<u>\$4,549,932</u>	<u>\$6,309,641</u>	<u>\$4,689,105</u>
Total Economic Output	\$11,888,532	\$16,486,481	\$12,252,177
Personal Earnings	\$5,944,266	\$8,243,240	\$6,126,088
Employment (full & part-time jobs)	153	212	158

As presented in the exhibit, the estimated total output (direct spending plus indirect/induced spending) for a potential Elmhurst Indoor Sports Facility in a stabilized year of operations (assumed fourth full year of operation) is estimated to range between approximately \$11.9 million and \$16.5 million per annum (in 2016 dollars), depending on the scenario. Additionally, this spending is estimated to annually support



million and \$8.2 million in earnings (or personal income) in the local Elmhurst economy, along with between 153 and 212 full and part-time jobs throughout the Elmhurst economy, depending on the scenario.

Non-Quantifiable Impacts

In addition to the more quantifiable benefits, some benefits related to the operations of a potential Elmhurst Indoor Sports Facility cannot be quantitatively measured. First, the estimated quantitative impacts (outlined in the previous section) of the potential facility in Elmhurst do not include benefits that may be generated from other private sector developments surrounding the facility such as hotel, restaurant, other retail, and entertainment establishments.

Additionally, other potential qualitative benefits for Elmhurst and its residents could include:

- Enhanced sports and recreation opportunities for local youths and adults;
- Reduction in the need for residents to leave Elmhurst for sports and recreation activities;
- Synergy with the other sports, recreation, entertainment and leisure facilities leading to increased tourism activity;
- Enhanced community pride, self-image, exposure and reputation; and
- Enhanced regional exposure.

These quantifiable economic impacts (through driving new visitation and associated new spending and tax revenue generation) and non-quantifiable benefits are often cited as reasons for upfront and ongoing funding participation in these types of facility projects by the public sector in many communities throughout the country.

8.0 FUNDING ALTERNATIVES ANALYSIS

The purpose of this chapter is to summarize various public and private sector funding opportunities that could represent potential sources of funding to develop a potential Elmhurst Indoor Sports Facility and meet any on-going operating requirements and capital reserves. The funding analysis presented herein is not intended to be an exhaustive review of all potential funding sources, but rather a review of the most likely funding sources that may be available specific to this project based on discussions with Elmhurst Park District, City of Elmhurst and other local stakeholders, as well as comparable sports complex funding sources.

Typical Public Sector Funding Sources

While there are a variety of public sector funding vehicles and revenue sources that have been used in the financing of amateur sports facility projects in communities throughout the country, a large percentage are owned by the public sector and had original or expansion construction funding provided through municipal capital project funding (i.e., transfers from a City's General Fund or Capital Projects Fund, etc.) or through the issuance of General Obligation or Revenue bonds. Types of financing/funding vehicles that are commonly used in amateur sports facility projects throughout the country include:

- General Obligation Bonds
- Revenue Bonds
- Tax Increment Financing (TIF)
- Pay-As-You-Go Financing
- Certificates of Participation
- State/Federal Assistance
- Private/Public Equity & Grants

Under situations where bonds have been issued, debt service is often supported by local tax revenue, which has tended to include the following:

- Sales and use taxes
- Property taxes
- Hotel/motel taxes
- Restaurant/food & beverage taxes
- Sin taxes (alcohol, cigarette, etc.)
- Admissions/entertainment taxes

The types of financing mechanisms typically used in funding venues like the potential Elmhurst Indoor Sports Facility are summarized on the following pages.

Funding/Financing Vehicles

Revenue Bonds

A frequently used method of sports facility financing is the issuance of revenue bonds. Revenue bonds are special obligations issued by municipalities, counties, and states for which payment is dependent upon revenues generated by the project. The issuer of the bonds pledges to the bondholders the revenues generated by the project being financed. No pledge of state or local ad valorem tax revenues is required; however, other taxes (e.g., sales/use tax, hotel/motel tax, tax increment financing) may be assessed and/or pledged in whole or in part by a municipality or by the state, often with legislative or voter approval, to provide funds necessary to pay off the revenue bond offering.

The major disadvantage associated with revenue bonds relates to interest rates that are typically higher than those associated with general obligation bonds. This is largely due to the fact that revenue bonds are not backed by the full faith and credit of the issuing entity. In addition, funding of a debt service reserve and other credit enhancement out of bond proceeds makes the required bond size larger with higher annual debt service payments.

Revenue bond financing may be structured in such a way that payments may be tied to a lower variable rate in the initial years of operation and converted to a higher fixed rate in later years. This is often advantageous in situations where the particular revenue stream or streams that are pledged to bond debt service are expected to increase annually.

General Obligation Bonds

General obligation (GO) bonds are backed by a pledge of ad valorem taxes of the issuer. This pledge is generally supported by a commitment from the issuer to repay the principal and interest through whatever means may be necessary, including levying additional taxes. The advantages associated with general obligation bonds revolve around the strength of the credit. The issuance of general obligation bonds typically results in a simple financing that lowers the cost of issuance and reduces the bond size, since a debt service reserve fund is often not required. Also, the strength of the pledge provides a higher credit rating and, therefore, a lower cost of financing a project.

Similar to revenue bonds, general obligation bond financing may also be structured with a lower variable interest rate in the early years of the project with conversion to a fixed rate in later years; however, this could require legislation to be enacted. The primary disadvantage associated with general obligation bonds is that the bonding capacity for other capital needs is reduced. Projects financed with general obligation bonds typically need voter approval. The public may perceive a project, such as a sports complex, as less essential than improved streets, libraries, or fire and police protection, especially if it will necessitate property tax increases. However, based on the results of the Community Survey, as discussed in a previous chapter, the public support for investing in the development of these facilities is encouraging.

Debt Service Support Mechanisms

Tax Increment Financing (TIF) District

While substantial project funding could be achieved with a property tax increase, this type of funding source has often proved difficult to secure in other communities. Another approach involving the use of property taxes to fund sports facility development is the establishment of tax increment financing (TIF) districts. A TIF district essentially involves capturing assessed valuation growth within a specific area (i.e. TIF district) related to a particular development. TIF often requires enactment of legislation by the State legislature. Typically, a redevelopment agency delineates a project area and declares a base year. The existing base-assessed valuation is taxed as before by each overlapping taxing entity covering a portion of the project area. The additional assessed valuation, added to the tax rolls over the base, is taxed at the same rate as the base valuation. However, the tax revenues attributed to the new incremental assessed valuation are remitted to the redevelopment agency and used to pay debt service. This is accomplished without an increase in the property tax rate paid by local residents and businesses.

The City of Elmhurst currently has four active TIF districts, including: I) Central Business District – expected to close in 2021; II) Lake Street District – expected to close in 2016; III) Route 83/St. Charles District – expected to close in 2019; and, IV) North York Street District – expected to close in 2035. Three of the four districts are operating with a positive fund balance (incremental tax revenue collections have exceeded debt service payments), with the excess balance held in reserve for future capital improvements and debt service payments. A fifth district is proposed for Church Road/Lake Street.

Hotel/Motel Taxes

There are several industries and geographic areas that could benefit directly and indirectly as a result of activity generated by potential indoor sports facilities. For example, the hotel/motel industry is directly affected by the room nights, room revenue and other hotel spending of tournament, competition or meet attendees and their traveling parties that require an overnight stay in Elmhurst. Currently, the total effective hotel tax in Elmhurst is 10.0 percent, which includes a 4.0 percent assessment that goes to the City of Elmhurst. Currently, City of Elmhurst tax collections are estimated at \$420,000 annually. An increase of 1.0 percent hotel/motel tax assessed within Elmhurst properties would be expected to generate approximately \$100,000 annually that could be allocated to debt service and/or ongoing operations.

Potential Private Sector Participation and Other Revenue Sources

In recent years, a growing number of communities have explored ways in which the private sector can participate in reducing the overall funding burden borne by the public sector. This participation has taken the form of: (1) naming rights; (2) sponsorships; (3) upfront service provider fees and facility component build-outs; (4) exclusive facility use agreements; and (5) private donations of capital and/or land.

Each of these opportunities for private sector participation in funding the facility should be evaluated. Given the potential costs for construction and the annual costs to operate, such private sector participation may be a necessary component of a successful project.

Naming Rights and Sponsorships

Naming rights and other unique sponsorships have been increasingly used in funding amateur sports facilities in recent years. Naming rights agreements typically consist of a local corporation paying a fee upfront and/or over a series of consecutive years in exchange for the use of their company's name for the entire facility or various components of it. Naming rights agreements are much more prevalent with professional sports facilities than with other event facilities such as amateur sports facilities. This is primarily attributable to typically much greater exposure potential at professional sports facilities (i.e., national broadcast coverage of events, exposure through other forms of media, millions of annual spectators, etc.). However, corporate value propositions have been increasingly identified for youth sports facilities through health and wellness partnerships and sports apparel retailers, among others.

Some examples of naming rights agreements and sponsorships for youth sports facilities include the following:

- \$2 million over five years for the Discovery Center (Germantown, MD)
- \$1.9 million over ten years for the UW Health Sports Sports Factory (Rockford, IL)
- \$1.5 million for the Cownie Soccer Park (Des Moines, IA)
- \$1.5 million for Toyota of Lewisville Railroad Park (Lewisville, TX)
- \$925,000 over three years for WakeMed Park (Cary, NC)
- \$625,000 over five years at Overland Park Soccer Complex (Overland Park, KS)
- \$500,000 over five years for Bakersfield Soccer Village (Bakersfield, CA)

Based on a review of naming rights revenue generated at other comparable sports complexes and a review of the depth and breadth of the local corporate community, it is estimated that an additional \$500,000 to \$1.75 million could be raised (approximately \$50,000 to \$175,000 annually over ten years) from a comprehensive naming rights program for potential indoor sports facilities in Elmhurst.

Upfront Service Provider Fees and Facility Component Build-outs

The sale of sports complex pouring rights could provide a meaningful source of annual revenue for the proposed Indoor Sports Facility. For example, WakeMed Park in Cary, North Carolina signed a three-year, \$50,000 contract with Pepsi for the pouring rights to its sports complex. FieldHouse USA in Frisco, TX, signed a 10-year pouring rights agreement with Coke, worth approximately \$200,000 annually (substantially exceeds industry standards). These funds typically are earmarked to fund ongoing facility operations and not toward upfront project funding.

Facility Use Agreements

In certain communities, there may be organizations or institutions that have a need for regular and ongoing usage at indoor sports facilities. IC Prep may be a potential candidate for such a partnership in which it may be possible to negotiate up front funding or advance rental payments in exchange for guaranteed use of the facility during certain times of the year. Additionally, Edwards-Elmhurst Health may also be a partner candidate; however, based on conversations with representatives, their level of interest would largely be predicated on the facility's inclusion of "wellness-oriented" facilities and programming (such as aquatics therapy and/or fitness/membership amenities). Such corporations or institutions may also be involved in the actual design of the event facility to help ensure that their facility needs are addressed.

Private Donations of Capital and/or Land

Certain communities have succeeded in historical fundraising efforts for various public projects. In these instances, a few high-profile, community-oriented wealthy individuals have provided private donations of capital and/or land to help defray public sector development costs.

Private donations from philanthropic individuals and organizations are often critical in the fundraising efforts for theaters. Local capital campaigns (many times via the establishment of a dedicated endowment fund) tend to be instrumental in establishing seed money and demonstrating local interest in a project. It is suggested that attempts be made to identify seed money of this nature if a determination to pursue development of an Indoor Sports Facility is made.

Registration Fee Surcharge

A potential source of private sector funding for potential new indoor sports facilities in Elmhurst could include a registration fee surcharge that would be applied in addition to tournament participation fees imposed by third-party organizers. As an example, James W. Cownie Soccer Park in Des Moines, IA implemented a \$4.00 registration fee surcharge to help fund project costs for the facility.

Parking Fee

Another potential funding source, similar to a registration surcharge, would be the implementation of a parking fee for individuals who take advantage of on-site parking during league and tournament events held at Elmhurst indoor sports facilities. For purposes of this analysis, it is estimated that parking fees would be bonded to provide upfront project cost funding.

Funding Conclusions and Recommendations

An analysis was conducted to evaluate potential funding sources for a potential Elmhurst Indoor Sports Facility. A variety of funding sources were considered. It should be noted that the list of sources is by no means intended to be exhaustive or cumulative in nature. Rather, the funding analysis developed herein was intended to identify the most typical or likely sources of project funding based on a review of comparable facilities and the resources that may be specifically available in the local market. The ultimate financing structure of a facility is dependent on political, economic and other issues of various parties that may be involved in developing a potential Elmhurst Indoor Sports Facility. In some markets, the public sector has the ability to finance a substantial portion of the project cost, while in other markets it does not. The same is true of the private sector.

Conversations with City of Elmhurst and Elmhurst Park District representatives have indicated that General Obligation bonding is likely the most viable source of funding for developing a potential new Indoor Sports Facility in Elmhurst. This funding would be backed by the full faith and credit of the City and/or the Park District. While a property tax revenue increase is an option, it is not the only viable mechanism for generating the annual revenue necessary for debt service. Developing a TIF district or extending an existing district nearing closure may provide a significant source of annual revenue. An important consideration will be the ultimate site selected for one or more indoor sports facilities, as it will be important to ensure that attendance and activity generated by sports facility operations would reasonably be expected to impact activity within the designated district.

Another potential source of funding would be through an increase in the City's collection of the hotel/motel tax. As discussed, the total effective hotel/motel tax rate is currently at 10 percent, and a one percent increase is expected to generate approximately \$100,000 annually. As with TIF district funding, it will be important to consider the type of event activity within a potential Elmhurst Indoor Sports Facility, specifically whether a significant enough portion of utilization will be generated from individuals requiring an overnight stay. Additionally, site selection for any potential new indoor sports facility may have a significant impact on this potential funding source, as locating a facility too close to hotel properties outside the Elmhurst city limits may limit the overall impact realized by local hotel/motel operators.

Lastly, naming rights sales have been increasingly utilized for amateur sports facility development and/or ongoing operational funding. One example is the recently opened UW Health Sports Factory in Rockford, Illinois that is collecting \$175,000 annually with payments inflated annually to arrive at a ten-year private investment of \$1.9 million. Fully vetting potential private funding partners such as Edward-Elmhurst Health, local sporting goods retailers or other such private sector partners could provide important funding assistance. Important considerations will include, but not be limited to, the nature of the facility, the potential local and non-local reach of leagues, tournaments, clinics, camps and competition, ancillary facilities that may be developed within the venue and the potential opportunity for the funding partner to have increased access to the venue.

As discussed, these partnerships may extend beyond the private sector. Consideration of partnerships with Elmhurst College, IC Prep or other local educational institutions may provide an opportunity to minimize the funding burden on the private sector. One example of a potential partnership opportunity would be for the City and/or Park District to participate in construction funding, while the educational institution would operate the facility without requiring public assistance for ongoing financial operations. Another opportunity may be to enter into an agreement for upfront payment of rent to provide an infusion of funds for debt service. In either scenario, it will be critical that the City, Park District and/or educational institution enter into a use agreement that would guarantee access and rates for both parties. Both options provide opportunities to mitigate some of the risk that would be incurred by the public sector, while raising the overall profile of the facility/facilities by providing an opportunity to attract regular high school and/or collegiate games, tournaments and competitions.

Lastly, consideration could be given to partnering with a private equity partner who would assume the majority burden of construction funding and operating risk. One example of this is Bo Jackson Elite Sports in Lockport, Illinois, operated by Sports Facilities Management (SFM). This is a privately built facility consisting of a 115,000-square foot hard/soft indoor facility, with a focus on turf fields. If it were to be developed in Elmhurst, such a facility would ideally be co-located at a larger complex (i.e., next to courts facility and/or ice complex). Public contribution would be limited (from as little as land, to land plus incentives, depending on negotiations and outcome/use expectations), with an opportunity to leverage \$7.0 million or more in private investment. While this model may not be optimized for maximizing the accommodation of the types of local league play and recreational opportunities desired by the Park District and City, midweek access for local clubs and organizations could be protected through upfront negotiations. Additionally, the consolidated private management of a larger complex (i.e., the privately-led turf facility plus a publicly-led courts facility and/or ice complex) could be an opportunity to further defray public sector costs and enhance outcomes.

**APPENDIX A:
ADDITIONAL SUPPORTING INFORMATION**



APPENDIX B: COMMUNITY SURVEY RESULTS

