

# DuPage Game Plan: Sports Tourism

2019

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# Introduction to The Game Plan

**T**he tourism industry of DuPage County, Illinois, is powerful. With numerous positive tourism attributes and the second-largest base of hotel rooms outside of the Central Business District of Chicago, DuPage visitor spending in 2017 climbed to \$2.6 billion, an increase of 3% from the year prior. Visitors contributed \$160 million in tax revenue to the state and \$46 million to local tax receipts. Over the last five years, increases in the key performance indicators – spending, tax revenue and jobs – have exhibited a 1.5-6.1 percent change. The growth represents a savings of approximately \$1,300 per year in taxes for the average DuPage County household, according to the Illinois Office of Tourism. While tourism in DuPage is consistently growing, so too is the competition, but at a more rapid pace – resulting in a loss of market share for DuPage. In response, the DuPage Convention & Visitors Bureau (DCVB) has taken proactive measures by intensely reviewing and investigating several tourism markets of potential growth.

Sports tourism – *one of the fastest growing sectors of the travel industry* – was identified through the strategic plan of the DCVB, GPS: A Tourism Roadmap, as a market offering potential growth in DuPage but requiring further research. This is why in June of 2017, the DCVB Board of Directors approved the allocation of significant resources, kicking off a multiphase assessment with Sports Facility Advisory | Sports Facility Management (SFA|SFM), and Huddle Up Group (HUG), two industry-leading sports destination development consulting groups, to evaluate the potential growth of visitation and economic impact to DuPage County through sports tourism. The following executive summary is a compilation of reports and studies submitted by the “Consultant Team” and industry research provided by the National Association of Sports Commissions.

Throughout the research process, it became apparent to the Consultant Team that there is an opportunity for the DCVB to enhance its presence in the sports tourism market and better position DuPage regionally and nationally. The only question would be to what extent this development effort can be supported financially in order to best benefit DuPage County and its residents.

## The DCVB definition of success for sports tourism includes:

- Determining how sports tourism developments can benefit the recreational needs of DuPage residents.
- Becoming known as a regional sports tourism destination and driving a high volume of events year-round that draw non-local visitors to spend the night in DuPage County.
- Attracting, regularly hosting, and retaining events that are large enough to spread economic impact across the County.



North Central College

# Sports Advisory Committee

## Participatory Process

In order to incorporate a diverse array of perspectives in the process, a Sports Advisory Committee was established, bringing together professionals representing community leadership, college athletic departments, the hotel industry, park districts, and tournament and event organizers. This committee helped the consultants navigate the DuPage landscape and findings after dozens of phone and in-person interviews with various user groups and stakeholders. The committee's direction, input and feedback were vital to the final recommendations presented to the DCVB's Board of Directors. ■

## DuPage Sports Tourism Advisory Committee

**Mike Benard**, CEO, *Wheaton Park District*

**Michael Cassa**, CEO, *Downers Grove Economic Development Corporation*

**Jerry Evans**, General Manager, *Hotel Arista*

**Todd Finner**, Director of Recreation, *Village of Bensenville*

**Matt Foster**, Assistant Athletic Director, *College of DuPage*

**Rich Janor**, CEO, *GameDay USA*

**Karen Krohn**, FMC Natatorium at Ty Warner Park

**Greg McVey**, Athletic Director, *College of DuPage*

**Mike Moyzis**, VP, *GameDay USA*

**Jeff Pruyn**, Mayor, *Village of Itasca*

**Evan Summers**, Village Manager, *Village of Bensenville*

**Dave Thommes**, Deputy Director, *Oak Brook Park District*

**Jim Zay**, DuPage County Board, *District 6*

# State of the Industry

**A**ccording to the National Association of Sports Commissions (NASC) - the only trade association for the sports tourism industry in the United States - estimated visitor spending associated with sports tourism events was \$11.40 billion in 2017, an increase of 9% from the year before, signaling the continued health and strength of the market's growth. With the continuous growth of the industry year over year, more destinations across the country are vying to host sports tourism events, as noted by NASC membership, which has grown from 35 destinations in 1989 to more than 535 today.

Within DuPage, the DCVB has a solid mix of community leadership and a staff that is viewed as doing a lot with very little in the way of resources. The current DCVB staff person responsible for the sports market wears multiple organizational hats, limiting the organization's impact. The top CVBs in the country have dedicated sports sales and development staff that is often accompanied by a service manager. Despite the current limitation of staff and resources, sports has represented 30% or more of the DCVB-booked business annually. The DCVB has also forged meaningful relationships with top event organizers across the country and has built bridges with local grassroots events and venue

leaders needed to support events.

Between 2014 and 2017 the DCVB has supported hosting more than 60 sports tourism events, ranging from numerous USBC Bowling Championships to USA Weightlifting Nationals, providing an estimated 74,000 overnight hotel stays and \$12.5 million in direct spending. Other historical noteworthy events hosted in DuPage and supported by the DCVB include, but are not limited to, the 2012 PGA Ryder Cup at Medinah Country Club and frequent NCAA championships across many sports at several colleges and universities. Events supported by the DCVB represent only a portion of total sports tourism events that have taken place, or will, within DuPage.

Much of the DCVB's results in overnight stays and direct spending stem from a handful of major national tournaments, which have a county-wide impact due to their size and nature of competition. These events involved a formal bid process against national competitors, requiring substantial investments through hosting fees and supporting resources. The DCVB was able to secure these events in large part due to having appropriate venues supportive of and dedicated to tourism, including Stardust Bowl of Addison (84 bowling lanes) and the Westin Lombard Yorktown Center (18,000-sq.-ft. ballroom).



# “Sports has **30%** represented or more of the DCVB-booked business annually.”

In addition to these national “bid-in” tournaments and events, DuPage has a solid foundation of local “grassroots” sports organizations, including 200 x 85 Hockey, Game Day USA, Oak Brook Polo Club, Intelligentsia Cup, Scottish Festival & Highland Games, and College of DuPage – Red Grange Bowl. These sports organizations create numerous events that generate significant visitors and economic impact for individual villages or cities of DuPage. Nationally, the grassroots segment of sports tourism (\$11.4 billion) is exclusive of mega events like a Super Bowl, Final Four, etc., and is projected to grow at a pace of 12-14% per year over the next decade. The demonstrated success of hosting nationally recognized events, matched with its existing grassroots base, provides DuPage a strong foundation from which to build upon.

After a tour to more than 40 venues in DuPage with the Consultant Team, only one venue qualified as an “anchor” that is capable of regularly hosting youth and amateur regional and national tournaments. That venue, Stardust Bowl of Addison, is dedicated to and capable of supporting one sport (bowling) and drives a high volume of consistent visitors and overnight stays. Additionally, DuPage has a distinguished inventory of premier quality public and private

golf courses, many with their own storied history of hosting a range of events and championships that provide significant tourism impact. Some of the notable courses that have regularly hosted tourism driving events include Medinah Country Club, Butler National Golf Club, Chicago Golf Club, and Cantigny Golf.

While DuPage has numerous other quality venues (i.e. colleges and park districts) that have the potential to be part of a broader host package for sports tourism events, their primary purpose and use is dedicated to university usage local recreation. Given the dense population and user base of DuPage, these venues are extremely limited in availability for tourism and mostly lack the number of fields or square footage and required tournament-quality amenities, such as turf fields, seating, lockers, WiFi, parking, etc. As a result, DuPage residents with youth active in sports are regularly forced to travel greater distances regionally for tournaments and events outside of DuPage, primarily to Rockford and the Indianapolis area. New anchor facilities with an adequate number of fields or courts and tournament amenities have been identified as a need in DuPage to meet the demand of its residents and local users, and also provide greater tourism impact opportunities. ■

*Bolingbrook Golf Club*



# 10 Universal Truths about DuPage Tourism and Sports Market Position:

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**1** With the single exception of the Stardust Bowl of Addison, DuPage County does not possess a significant “anchor” venue supporting larger youth and amateur national-level tournaments. If the Westmont Natatorium project is built to the specifications outlined to the Consulting Team, it will meet the requirements to be considered another anchor venue.

**2** While several projects are in concept phase, no tourism-driving facilities supporting regional and national-level youth and amateur sports have been announced to the public that have a funding source attached to allow them to become reality.

**3** There is no dedicated funding source to develop new sports facility products, or to enhance those that exist today.

**4** Many of the existing facilities that could host significant tournaments are typically unavailable due to their existing tenants and programs (examples: privately managed facilities, colleges or universities in the area).

**5** In the near term (without any new funds dedicated to facilities) the DCVB will have to be creative with its current budget to make a positive impact into the future.

**6** The current siloed make-up of the DCVB membership (or non-membership) will make it difficult to grow the impact of the sports tourism market within the current structure.

**7** Sports tourism represents a significant portion (30%) of the DuPage CVB's group bookings over the past five years. Without a significant meeting venue, it is recommended to diversify the tourism offering of DuPage County through specialty markets such as sports and related special events.

**8** Through the DCVB's strategic planning process, sports tourism was identified as an area of interest for further investigation to identify potential opportunities that may exist. Product development, not limited to sports, is a cornerstone concept of the DCVB's strategic vision.

**9** Unless the model changes, neither the DCVB nor any other entity in DuPage County will be able to make a significant impact in the sports tourism and event market.

**10** There is strong interest, supported by several different jurisdictions and sports groups, for the development of new venues, and land must be identified that can support them. ■

# The DuPage Game Plan Strategy

Using the research and findings by the Consultant Team, along with the feedback of the Advisory Committee, the DCVB has a refined sports tourism strategy focused on three objectives:

- 1** Immediate advancement of DuPage's presence in the sports market through the creation, branding and launch of a DuPage sports commission by the DCVB; *a fully-realized sports tourism program with long-term sustainability through investment and partnership with additional stakeholders.*
- 2** Enhanced DCVB focus on supporting and creating more grassroots events with local promoters and organizers.
- 3** Creation of a DuPage facility enhancement fund and laying groundwork for joint inquiry for potential development of a new sports tourism anchor facility.

*Oak Brook Polo Club*



# Objective



**T**he DCVB will invest in an enhanced sports marketing initiative by creating a new sports commission product and brand, to include adding staff and allocating a larger budget. It is believed that the creation of a DuPage sports brand will more effectively mobilize additional traditional and non-traditional tourism partners and allow a unified vision of stakeholders while better positioning DuPage nationally within the industry.

The priority of this newly created department, or sports commission, is to become the go-to organization that the community can lean on for all sports tourism related issues and opportunities. By creating a culture of sports and event development county-wide, the DCVB can leverage opportunities today to provide a meaningful impact while helping craft a vision for the future. DuPage shouldn't let facility discussions get in the way of sports tourism efforts that can happen today. More resources are needed even if new products and venues don't materialize. This sports initiative must be strategic, and a resource-efficient approach will be required to have long-term success.

For the second year in a row, the NASC Annual Membership Survey found that 42% of convention and visitors bureaus or sports commissions were involved in some form of community health and wellness program. With DuPage continually being recognized as the healthiest county in Illinois, according to the Robert Wood Johnson Foundation and University of Wisconsin Population Health Institute, it would be valuable for the DuPage sports initiative to provide a "return on mission" to DuPage residents. The principal ways that NASC sports organizations supported community health and wellness in 2017 included:

- Youth Festivals and After-School Programs
- Partnerships with Parks & Recreation Departments for Community Runs and Walks
- Coaching and Peer Consulting

Initial costs for stakeholder outreach, partnerships, marketing and PR needs, and an event opportunity fund for grassroots efforts are estimated to total between \$193,500 - \$247,000 annually. In order to capitalize on immediate opportunity, the DCVB in the short term can allocate an estimated 20% of its Local Tourism Bureau Grant (LTCB) from the Illinois Department of Commerce and Economic Opportunity (DCEO). While this may be a short-term funding solution, additional stakeholder investment will be essential in not only minimizing the financial burden to the overall DCVB budget, but also in creating a fully-realized sports tourism presence with long-term sustainability.

It is important to emphasize that even with an injection of additional resources towards sports tourism, the DCVB's operational funding model would still be insignificant compared to its regional and national competition. DuPage's regional competitors have dedicated resources to the sports tourism market, including financial capital, human capital and physical capital (venues). As a point of reference, below are the incentive/deal-closing budgets (not the total operating budgets) for some of the top sports organizations in the country, along with their staff size. Similar to DuPage, each of these communities has a significant grassroots sports effort, collegiate presence, and substantial hotel inventory. ■

Destination	Deal-Closing Budget (not total budget)	Sports Staff (FTE)	Population	# Of Hotel Rooms
Tulsa	\$1.2 million	7	401,800	16,457
Fort Worth	\$950,000	2	874,168	13,477
Des Moines	\$550,000	3	217,521	13,000
Oklahoma City	\$700,000	2.5	643,648	17,166
DuPage County	Approximately \$20,000	Less than 1 FTE	916,924	16,621

Source: Huddle Up Group

# Objective

## 2

**A** two-pronged sports tourism event development approach for DuPage will include the current practice of pursuing a limited number of traditional bid-in events with event rights holders, and a new vision for incubating and creating new events in partnership with local promoters.

The “old-school” sports tourism model of the past, where attending industry conferences and bidding on RFPs was enough to achieve success, will not be a sustainable model for DuPage. However, the DCVB should continue to prioritize and focus on bid-in events that are attainable and have

strong support through local organizing committees and groups. This includes continuing to build relationships with the various golf courses within DuPage that have hosted, or are interested in hosting, regional and national events supporting golf tourism. In a market the size of DuPage County, with its numerous positive tourism attributes and existing base of grassroots events, it is critical that grassroots sports tourism and special events be further supported and, where possible, replicated to provide new tourism drivers. These grassroots organizations and their events typically begin by serving local residents and over time grow to become regionally and nationally recognized events.

Proven in existing cases within DuPage, these grassroots events are capable of bringing competitors and visitors from around world to DuPage and would not be subjected to an RFP or bid process – thus, having much less risk of being lost to regional or national competitor destinations. A stronger emphasis on grassroots event support and creation will in turn deliver more consistent and increased overnight stays, along with positive economic impact in DuPage County.

Along with regular partnership development, the DCVB can look to carve out specific dates in the current facilities and use nontraditional event spaces, such as those within the Forest Preserve District of DuPage County that are capable of supporting tourism. This will require time to refine and a laser-focused approach. As the DCVB's expanded efforts take root and new locally produced events are developed, there will be less of a need to focus on competitive-bid processes to drive overnight stays. ■



# Objective

## 3

In order to effectively use current facilities, a program must be created to ensure consistency in scheduling, communication, management, maintenance, and rental pricing. If the DCVB were able to assist financially with the enrichment or expansion of area venues, there would be an opportunity to request favored-nation status, and priority for rental uses, in the future. A venue enrichment grant fund could enhance some of these existing facilities, making them more tournament-friendly to regional tournaments while serving to improve the local community user group's experience. Currently, no funding mechanism has been identified or established for this purpose.

The national best practice for the activation of these newly identified funds would be to use them as a catalyst for a "challenge grant"-style program. That is, there would be a formal grant request process for the DCVB's partners to apply for funds in a dollar-for-dollar match for capital projects that would drive overnight stays to the County. For every dollar the partner invests it would be eligible for a dollar from the DuPage Sports Development Fund, while also agreeing to terms granting the DCVB calendar access to facilities, as Favored-Nation Status. Employing this type of a matching program ensures that all parties have a vested interest in the positive outcome of each project and that the DCVB's investments are well protected. In addition, effective use of these funds to drive more overnight stays would subsequently increase the impact of tax collections by these additional visitors.

However, even with regular access and needed enhancements of facilities to meet tourism requirements

through a venue enrichment grant, DuPage still lacks "anchor" facilities to support consistent tourism. Without new facilities for tourism uses, DuPage will be fighting an uphill battle against communities with better options. It is advised by the Consultant Team that the development of a new venue will provide the most consistent opportunity for year-round economic impact in the County. Focus should be prioritized to a multiuse indoor facility due to its flexibility, number of sports and events that it could host, and ability to drive overnight hotel stays during shoulder and off-peak seasons from November to March.

New sports tourism facilities in DuPage would have a significant population of potential participants from which to draw. The sub-regional population within a 60-minute drive time is 7.2 million, and the regional population within a 240-mile radius is over 30 million. This large local population is vital to sustain and fill inventory during off-peak hours on weekdays when tournaments are not being held. Additionally, DuPage and its surrounding areas are a relatively young demographic with a household income that is above the national median. These households' willingness to spend on fees for recreation services is higher than the average and other markets analyzed by the Consulting Team. All of these positive demographics and socio-economic insights create a supportive market in which there is an opportunity for greater sports tourism.

The DCVB will take steps forward in developing an RFP/RFQ to engage a firm that can help craft a vision for a county-wide master plan for facility development in the future. The DCVB will act as the convening organization in securing participation from appropriate stakeholders, forming an Advisory Board consisting of leaders and representatives from the existing DCVB Sports Committee, DuPage communities, the County, park districts, and private real-estate partners. With the help of the DCVB, the Advisory Board will identify potential land and locations for new venues, oversee the work of the hired firm, and review the master plan recommendations. This master plan study would require financial buy-in and political will from all participating parties, with the total investment needed depending on the total number of viable concepts to be vetted.

This county-wide master plan would be the first step towards new facility developments that would better position DuPage to regularly host national-level championships bringing more consistent opportunities for year-round sports tourism impact.

According to SFA|SFM, new anchor tournament-class facilities will have a resounding, multigenerational impact on DuPage residents. This impact includes local youth and families active in sports, but also those residents who are not

***The following anchor facility developments would be the minimum recommended sizes to balance DuPage local needs with what potential tourism impacts they could regularly provide:***

Venue Type	Venue Size	Sub-Regional Participants	Regional Participants
Outdoor Multipurpose Fields	12-16 full-size fields	498,000	1.9 million
Outdoor Baseball/Softball Fields	6-8 full-size fields	393,000	1.5 million
Indoor Courts	6-8 full-size courts	871,000	3.2 million

Source: SFA/SFM

## ECONOMIC IMPACT PER EVENT

Venue Type	Tournament Size	Room Nights	Economic Impact
Outdoor Multipurpose Fields	6 Fields	309	\$161,556
Outdoor Baseball/Softball Fields	6 Fields	216	\$113,089
Indoor Court	8 Courts	292	\$153,179

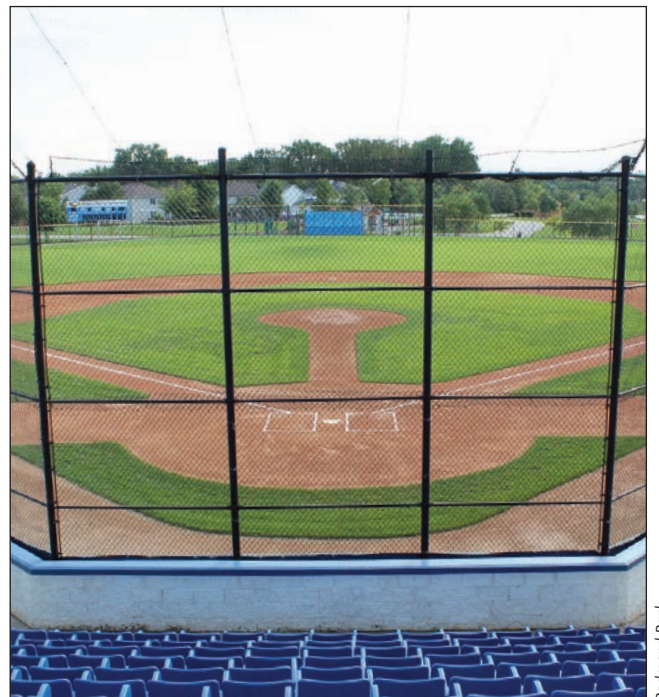
Source: SFA/SFM

part of the travel sports scene. It was found that many DuPage communities have more demand for sports and recreation programs than can be currently accommodated at local venues, and a properly planned, developed, and managed sports tourism facility can help bridge the local supply-and-demand gap during non-tournament/event days.

SFA/SFM have proven that facilities built to host tournaments can and should be utilized as local recreation assets. The Access Program – a new SFM initiative for improving access to sports for underserved communities – has used time, space, and personnel at sports tourism venues to break down the barriers to local access (time, cost, and location) and to create long-lasting economic, health, social, and education impacts on communities.

According to the Robert Wood Johnson Foundation, kids who are active in high-calorie-burning activities are just 10% as likely to be obese than their inactive peers. Furthermore, active kids earn higher test scores, participate in fewer risk behaviors as teens, and are more likely to graduate from high school. As active kids become adults, research demonstrates that adults who grew up active earn 7-8% more in their jobs, have lower health-care costs, and have a lower morbidity rate than adults who were not active children. Additionally, active kids are almost six times as likely to become active adults, and active adults are twice as likely as inactive adults to have active kids.

The research and results are clear: great facilities can provide strong economic impact and create great opportunities for activity benefiting the health and wellness of residents. Increased activity leads to stronger communities, and activity is a multigenerational trait. ■



Redmond Park

# DuPage Game Plan Conclusion

**S**ports is big business, and the competition has never been fiercer. There are more communities targeting the sports market than ever before. Most of DuPage's regional and national competition has solid venues, an established sports marketing program, and good human capital, with a sustainable funding model for all three elements. Catching up with the competition and remaining relevant in this space will require capital investment – in marketing, events, human capital, and facilities.

In order to enrich the current DuPage venue mix and support the development of new venues, the DCVB and its tourism partners would need to identify a sustainable funding source to help activate these initiatives. A number of markets across the country have implemented a dedicated tourism-based revenue source to enhance and build their sports facilities inventory. The DCVB will need to explore viable options further and the path to successfully implementing this source in partnership with County and tourism partners. With numerous cities using tourism-based revenue sources to support the construction or operations of new sports facilities (examples: Rockford, Evansville, Shreveport,

Spokane, Appleton, Tulsa, Eau Claire, Fort Wayne, Ashland, Millville, Elizabethtown, etc.), it is recommended by the Consultant Team that DuPage consider this strategy as a funding mechanism.

By moving this DuPage Sports Game Plan path forward, the DCVB will position DuPage County as a strong player in the sports tourism industry and provide additional value to its stakeholders in a meaningful way year over year. The benefit for DuPage residents should not be underestimated, as they would be positively impacted by upgraded facilities and opportunities to keep competitive youth sports events within their own community. As in any new project, there are numerous variables that would need to be considered in evaluating the ROI and risk in expanding the County's sports tourism program, including the creation of a sports commission program and the addition of new venue assets. A common agenda among the established Sports Commission Advisory Board to navigate the DuPage landscape and secure additional funding will be the key to fully reaching the definition of success to benefit DuPage and its residents. ■



FMC Natatorium at Ty Warner Park

# Consultant Team

## **Huddle Up Group, LLC**

Formed in 2012, the Huddle Up Group is a sports tourism, marketing, and event consulting company made up of experienced, award-winning executives. Its team has a successful track record of leading strategic growth, and creation, of industry-leading, non-profit sports tourism organizations through increased community collaboration with external relationships, while working with volunteer boards, donors, elected officials, hospitality community leaders, and various corporate partners.



## **Sports Facilities Advisory, LLC (SFA) & Sports Facilities Management, LLC (SFM)**

Founded in 2003, SFA has served more than 1,500 communities, produced more than \$8 billion in institutional-grade financial forecasts, and provided funding strategies and solutions for more than 120 youth and amateur sports and recreation complexes worldwide. SFM provides industry-leading, results-driven management solutions for sports, fitness, recreation, and event venues nationwide. Since 2014, SFM-managed venues have hosted more than 50 million visitors and generated millions of dollars in economic impact.



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