# Sports Tourism Market Analysis

## Iowa Travel Industry Partners & Iowa Tourism Office

June 5, 2024

POWERED BY THE HUDDLE UP GROUP

June 5, 2024

Chelsea Lerud
Executive Director
Iowa Travel Industry Partners (iTIP)
PO Box 1173
Burlington, IA 52601

Dear Chelsea,

Thank you for your efforts on our recent work in the state of Iowa. Your team and your stakeholders have been quite helpful throughout this process. The groundwork we have set with your team will serve as a strong foundation for future sports tourism, venue, and event development efforts into the future.

Enclosed is the report detailing our findings. The report includes an analysis of the entire state as well as individual destinations that participated in the study as it relates to sports tourism. This includes an overview and evaluation of the venue inventory across the state as well as recommendations going forward.

Please let us know if you have questions about the enclosed recommendations leading up to the roll out of the report. We are looking forward to our final delivery and follow-up discussions.

Thank you again for all your support throughout this process!

Yours in Sport,

Jon Schmieder
Founder + CEO
Huddle Up Group, LLC

# Iowa State Tourism Data
## Synopsis

The sports tourism industry has grown consistently over the past 30 years. A study by the Sports Tourism and Events Association – *State of the Industry Report 2023*, states that the participant driven portion of the domestic sports tourism sector was responsible for more than $52.2 billion in direct spending as of the end of 2023. This direct spending generated a total economic impact of $128 billion to local economies, driving over 750,000 jobs and $20.1 billion in taxes. Each of these numbers demonstrates a significant increase in the grass roots sports tourism sector over 2021. Add to this industry growth the increased popularity of emerging sports such as pickleball, BMX, and Esports, the opportunity for the continuing expansion of economic development through sports tourism is tangible and ever-expanding.

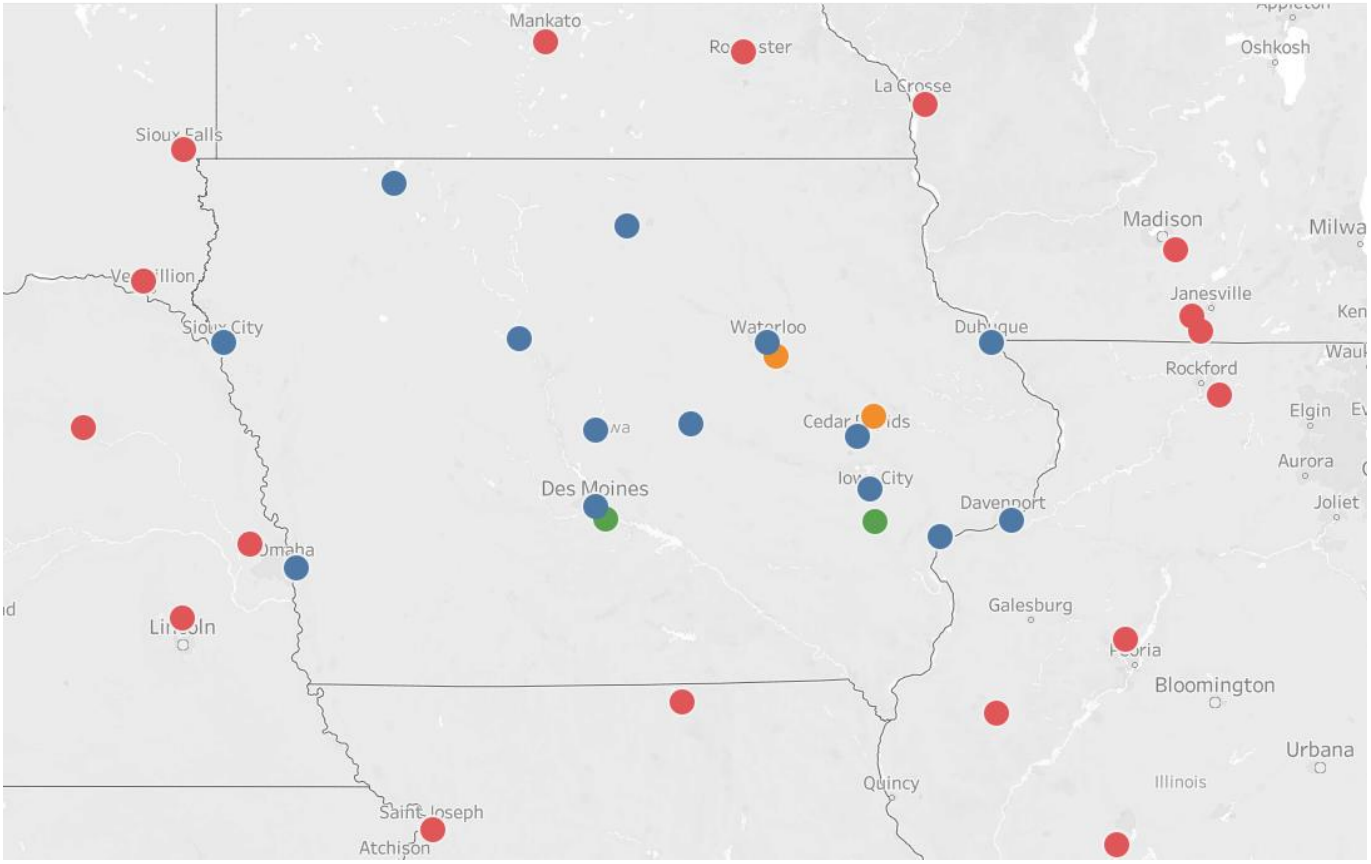
Throughout the research process, it became apparent to the Consultant Team that there is an opportunity for the iTIP to protect its current position in the sports tourism marketplace and to drive even more value to the Iowa in the future. The key moving forward will be for stakeholders within each destination and the state to work together in developing and maintaining tourism driving assets (sports venues) that can deliver upon the sports tourism mission of iTIP from one year to the next.

<u>Methodology</u>

The Consultant Team conducted an assessment on the current sports tourism work of various organizations within iTIP and an analysis of the state's sports venues. The project was led by Huddle Up Group Founder + CEO Jon Schmieder (Phoenix, AZ), Vice President of Partnerships Cole McKeel (West Palm Beach, FL), and Data and Communications Manager Kevin de Lange (Wilmington, NC). The project followed a three (3) step process that included:

1. The Consultant Team led an onboarding call and regularly scheduled one-hour phone calls with iTIP sports staff to discuss overall project goals and processes.

2. 18 stakeholder interviews with the participating iTIP organizations and data collection from 16 organizations. (The map on the next page shows the geographical layout of the 18 organizations that were interviewed, the blue circles are destinations, the green circles are rights holders, and the orange circles are venues. Additionally, the red circles around the state of Iowa are other surrounding destinations that have doubled down on sports tourism.)




3. An evaluation of the participating iTIP destinations through the Sports Tourism Index™ (a proprietary benchmarking tool developed by the Huddle Up Group).

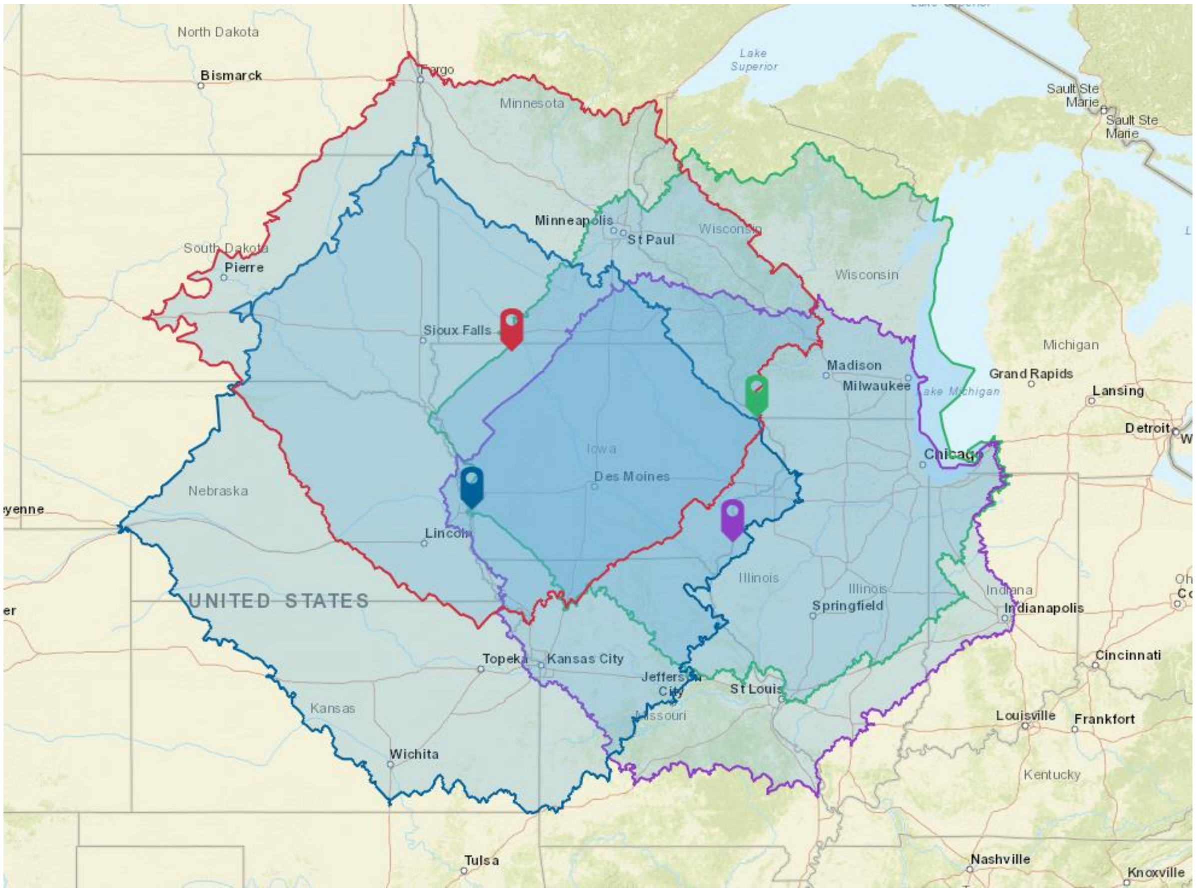
4. The Consultant Team performed market analysis aimed to provide iTIP with data regarding Economic Impact, the Sports Tourism Index, Facility Inventory, and the overall Iowa sports tourism market.

5. The Consultant Team performed a comprehensive needs analysis aimed to examine the specific requirements, challenges, and objectives of Iowa Travel Industry Partners. It was tailored to address the unique needs of iTIP, involving an in-depth exploration of the organization's current situation, both its strengths and weaknesses, and a clear understanding of its future goals and aspirations.

6. The creation and delivery of the state sports tourism analysis report and virtual presentations of the findings and recommendations to the members of iTIP.

# **Iowa State Tourism Data**
## **Demographics**

Iowa's geographic location brings with it a wealth of opportunities to attract visitors to the area. As you can see from the map below, there are several large population centers that can reach Iowa within a five-hour drive. Notable cities include Indianapolis, Jefferson City, Kansas City, Madison, Milwaukee, Minneapolis, Omaha, Springfield, St. Louis, St. Paul, Topeka, Wichita, Lincoln.




Utilizing data from ESRI reports, the following table provides insights into the markets that are reachable within a day's drive. It outlines key demographic factors such as the number of households, median household income, as well as the attendance and participation rates in sporting events throughout 2023.

| Driving Distance | Households | Median Household Income | Attended a Sporting Event in 2023 | Participated in any Sport in 2023* |
|---|---|---|---|---|
| 300 Minutes | 16,458,315 | $71,833 | 3,791,296<br>(4% higher than US average) | 72,560,093 |

* = Participants may be counted double if they engaged in multiple sports during the year.

# Iowa State Tourism Data
## Sports Tourism Index

Eight (8) iTIP organizations have fully completed the Sports Tourism Index™ survey and submitted their data for scoring, with four (4) additional organizations that are in the process of completing the Sports Tourism Index™. iTIP organizations boast a total of 228 facilities, including 94 which carry a Sports Tourism Index™ designation. To achieve a designation, a facility's score must rank within the top percentages of all evaluated facilities: the top 10% for platinum, the top 20% for gold, the top 30% for silver, and the top 40% for bronze.

**Scoring Methodology:** The Sports Tourism Index™ assesses destinations based on four key areas: facilities, destination strength, organizational structure, and events. These scores are determined through interviews with industry professionals and rights holders. Below is what is included in these four key areas:

- **Facilities:** This aspect evaluates the quality and condition of sports facilities within the destination. It considers factors such as modernity, maintenance, suitability for various sports events, and more.

- **Destination Strength:** This category evaluates the destination's strengths in terms of proximity to airports, the presence of Division 1 schools, transportation accessibility, the availability and quality of accommodations, such as hotels, and more.

- **Organizational Structure:** This bucket examines the destination's organizational strength, including the professionalism of staff, budget allocation for sports tourism efforts, the presence of grant programs, the effectiveness, and members of the board of directors, the members of an advisory group, and more.

- **Events**: Focusing on the events themselves, this category looks at the number of tourism-driving events hosted by the destination, the success rate in winning bids for hosting sports events, and more.

Each category plays a distinct role in shaping a destination’s appeal as a sports destination, offering a multifaceted perspective on its strengths and areas of development. Below – Iowa’s scores are listed in comparison to the other states in the Midwest region, providing a comprehensive assessment of its position within the highly competitive sports tourism landscape. The following states are part of the Midwest region: **Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Wisconsin.**

The table below presents a comparison of iTIP with several key benchmarks, including the overall average of all Sports Tourism Index destinations, the Midwest average, as well as market sizes under 500k and those above 500k. Wisconsin is generally considered best in class when looking at the Midwest region. Huddle Up Group thinks that Iowa should aspire to be like Wisconsin, given the similarities in size and the number of sports destinations between the two states. Wisconsin's success is largely attributed to the strong collaboration among its various sports destinations, which work cohesively to enhance the state's overall appeal as a sports tourism hub.

The table below compares Iowa's average scores across each of the four categories to the overall average, Midwest average, under 500k population average, and over 500k population average. It is important to note that the maximum score a destination can achieve in each category is 25, totaling 100 points. Due to the rigorous scoring criteria, these scores should not be viewed on a traditional A-F grading scale but rather compared to other destinations and states for a more accurate assessment.

| Bucket | iTIP | Overall Average | Midwest Average | iTIP Midwest Rank | Under 500k Pop. Avg. | Over 500k Pop. Avg. |
|---|---|---|---|---|---|---|
| Facilities | 8.95 | 9.58 | 8.68 | 8th out of 13 | 9.14 | 11.65 |
| Destination Strength | 9.72 | 11.79 | 11.33 | 10th out of 13 | 10.66 | 16.96 |
| Organization Structure | 11.81 | 11.40 | 11.83 | 4rd out of 13 | 11.21 | 13.86 |
| Events | 9.39 | 7.88 | 8.12 | 2nd out of 13 | 7.66 | 9.03 |
| Overall | 36.78 | 40.65 | 39.96 | 10th out of 13 | 38.67 | 51.50 |

## Bid Batting Average

*Definition*: Bid Batting Average is a metric used to gauge the effectiveness of a destination's event bid submissions. It represents the ratio of event bids won compared to the total number of event bids submitted. A Bid Batting Average of 100% indicates that every event bid submitted by the destination has been successful.

*Iowa's Bid Batting Average*: In the case of Iowa, its Bid Batting Average stands at 49%, signifying that approximately 49% of the event bids submitted by Iowa have resulted in successful outcomes.

*Bid Batting Average Comparison with Other States*:

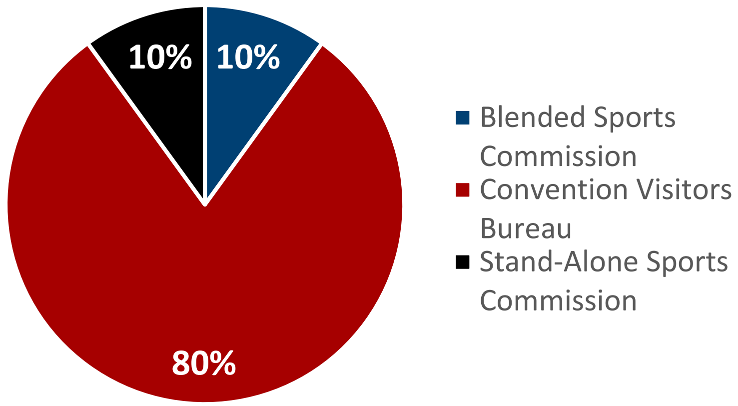
- From the Sports Tourism Index data, Iowa ranks 24th in terms of Bid Batting Average.
- The top 10 states on the Sports Tourism Index™ boast Bid Batting Averages ranging from 67% to 86%.

*Bid Batting Average Regional Comparison*:

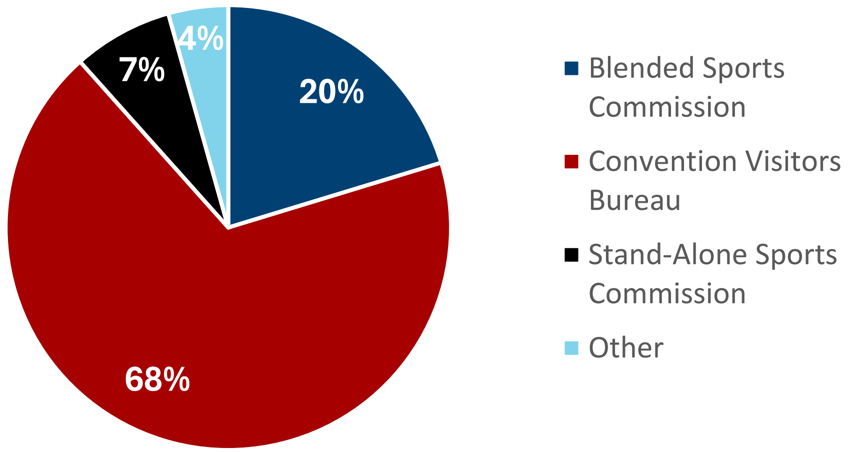
- When comparing Iowa to the other states in the Midwest, it ranks 7th out of 13.
- The average Bid Batting Average across the Midwest region is 53%, while Iowa's bid batting average falls slightly below 49%.

## Organizational Information

The Sports Tourism Index™ asks destinations about their organizational structure. The different choices that organizations can pick are Convention Visitors Bureau (CVB), Blended Sports Commission (operating under the umbrella of the CVB), Government, Stand-Alone Sports Commission, and Other. The graph below shows the organizational structure distribution of Iowa destinations.




To compare where Iowa stands in the sports tourism space, the graph shows the distribution of organizational structures of all Sports Tourism Index™ destinations.

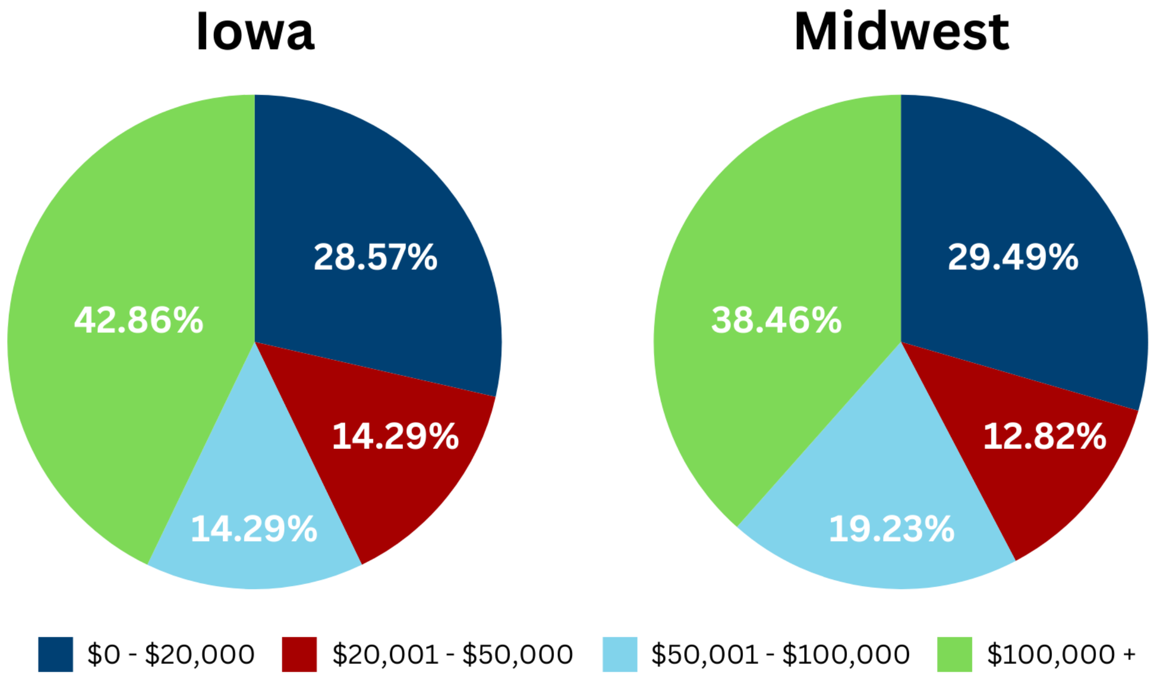


## Sports Budget Size

By using data from the Sports Tourism Index™, the Consultant Team is able to analyze the sports budget distribution among Iowa destinations and compare this to Midwest destinations. As can be seen from the following graphs, Iowa demonstrates a notable strength in its financial capacity, with a higher proportion of organizations operating with sports budgets exceeding $100,001 compared to the broader Midwest region. This suggests a robust foundation for investment in sports tourism initiatives, positioning Iowa favorably within the market.

Moreover, while Iowa excels in higher sports budget categories, it also maintains a competitive edge across other budget classes. With a significant percentage of organizations falling within the $50,001 - $100,000 sports budget range, Iowa has the opportunity to optimize these resources for targeted marketing efforts, infrastructure improvements, and community engagement initiatives. By strategically allocating funds to enhance sports facilities, promote local attractions, and support event logistics, Iowa can further solidify its position as a leading sports tourism destination.

Additionally, Iowa's representation in the $20,001 - $50,000 sports budget class indicates a considerable segment of destinations with moderate financial resources. To maximize the impact of these budgets, Iowa can explore collaborative partnerships, leverage digital marketing channels, and implement cost-effective strategies to attract sports events and visitors. By fostering innovation and adaptability within this budget range, Iowa can unlock new opportunities for growth and diversification in its sports tourism sector.



# Iowa State Tourism Data
## Facilities

In today's sports facility arms race, venues classified as "tournament friendly" or "anchor" are needed to attract top-tier participant focused championships and their related tourism dollars. A "tournament friendly" facility is defined as a venue that has an adequate number of fields/courts/sheets to host local and regional events. However, if trying to host larger national level events, these facilities would need to be cobbled together with additional locations. An "anchor" facility is defined as a venue that has enough fields/courts/sheets on its own to host major regional or national events **all in one location**. In addition to the pure number of fields/courts/sheets, the top anchor facilities in the country also provide key amenities such as permanent concessions stands, permanent restrooms, WI-FI, adequate parking, among others, which event rights holders require to host high-quality events.

The following table includes benchmarking information from a Huddle Up Group survey of over 300 event rights holders, outlining their ideal facility requirements for the most commonly used venues.

| Facility Type | Anchor | Iowa Anchor Facilities | Tournament Friendly | Iowa Tournament Friendly Facilities |
|---|---|---|---|---|
| Flat Fields | Minimum 16 fields | 1 | 8-15 fields | 5 |
| Pool | 50m/8-10 lanes with diving well | 1 | 25m with diving well | 1 |
| Diamonds | Minimum 12 fields | 0 | 8-11 fields | 7 |
| Hardwood Courts | Minimum 8 Basketball/ 16 Volleyball | 4 | 4 Basketball/8 Volleyball | 11 |
| Ice | 3+ Sheets Hockey/ 6+ Sheets Curling | 0 | 2 Sheets Hockey/ 4 Sheets Curling | 2 |
| Tennis | Minimum 12 courts | 3 | Minimum 6 courts | 2 |
| Pickleball | 32-60 Courts (National) | 0 | 8-16 Courts (Local) 24-32 Courts (Regional) | 1 |
| Indoor Track | 200 meter/6 lanes/banked | 0 | 200 meter/6 lanes | 3 |

Using the Sports Tourism Index™ as a benchmarking tool, the charts on the following pages summarize the key characteristics possessed by the top sports facilities in the country. Note that in the "Difference" column, the darker the color of green, the larger the gap between the top 10 facilities and the average.

## Flat Fields

**Flat Fields = 769 scored by the Sport Tourism Index™**

| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| **Full-sized soccer fields** | 21 | 5 | 16 |
| **Fields with lights** | 16 | 3 | 13 |
| **Artificial turf fields** | 8 | 1 | 7 |
| **Fields with portable goals** | 22 | 5 | 17 |
| **Auxiliary meeting rooms** | 4 | 1 | 3 |
| **Minimum of two team benches per field** | 100% | 77% | 23% |
| **Stadium field** | 80% | 34% | 46% |
| **Permanent concession stand(s)** | 100% | 67% | 33% |
| **Permanent restrooms** | 100% | 71% | 29% |
| **Permanent Wi-Fi** | 90% | 26% | 64% |
| **Adequate Parking (60 spaces per field)** | 100% | 91% | 9% |
| **ADA Compliant** | 100% | 91% | 9% |
| **Ability to book (Definitely yes)** | 80% | 46% | 34% |
| **Score** | 4.23 | 2.32 | 1.91 |

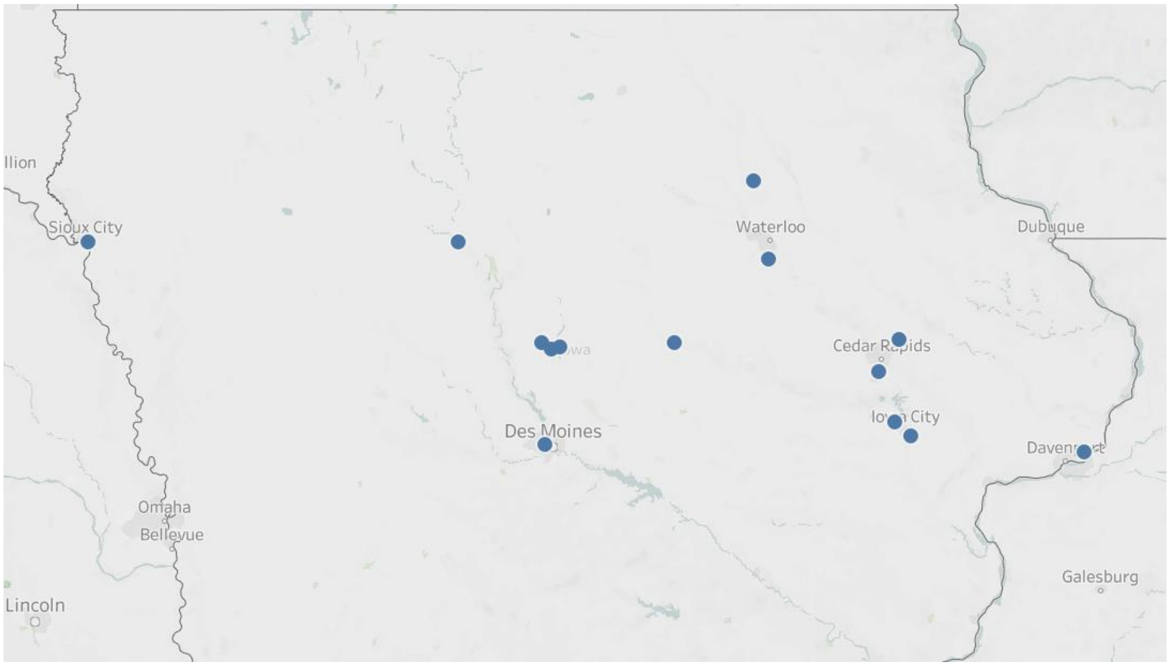
National Best in Class: Bell Bank Park (Mesa, AZ), Burns Soccer Complex (Little Rock, AR), ESPN Wide World of Sports (Lake Buena Vista, FL), Great Park (Irvine, CA), Kino Sports Complex (Tucson, AZ), Lake County Soccer Complex (Springfield, MO), Mercy Health Sportscore Two (Rockford, IL), Merrimack Sports Complex (Huntsville, AL), Mike Rose Soccer Complex (Memphis, TN), Moore Park (Lafayette, LA), Philip A. Bolen Memorial Park (Leesburg, VA), Reach 11 (Phoenix, AZ), Round Rock Multipurpose Complex (Round Rock, TX).

The table below displays the quantity of anchor or tournament-friendly facilities in neighboring states in comparison with Iowa.

| | Anchor Flat Fields Complexes | Tournament Friendly Flat Field Complexes |
|---|---|---|
| **Iowa** | **1** | **5** |
| **Minnesota** | 0 | 0 |
| **Nebraska** | 3 | 6 |
| **Missouri** | 2 | 4 |
| **Wisconsin** | 3 | 7 |
| **Illinois** | 8 | 9 |

When considering the 17 flat field facilities listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- Drake Stadium (Catch Des Moines)
- TBK Bank Sports Complex (Visit Quad Cities)
- Tuma Soccer Complex (Cedar Rapids Tourism)




As part of our strategic planning and facility feasibility studies, the Consultant Team routinely conducts economic impact analyses to assess the potential benefits of new facilities for the community, particularly from a sports tourism perspective. By leveraging local Average Daily Rates (ADR), spending patterns, and tax data, we estimate the projected economic activity that a new facility could generate. Given the multi-destination nature of this project across Iowa, we have utilized average tax rates, spending figures, and ADR data to provide a comprehensive overview of the potential impact. This analysis offers valuable insights into the anticipated benefits of venue development initiatives and serves as a foundation for informed decision-making. Using a conservative 25% capture rate for proven events that could fill the facility's calendar, the Consultant Team believes the following new economic activity could reasonably be realized over a calendar year:

- 11 new state, regional, and national tournaments.
- Close to 24,000 total attendees relating to tournaments/competitions.
- More than $5.1 million in total visitor spending.
- Over 9,900 hotel room nights.
- Hotel Occupancy Taxes exceeding $55,000.
- Sales Tax collections over $317,000.
- Total sports tourism related taxes over $372,000.

**Swimming Pool**

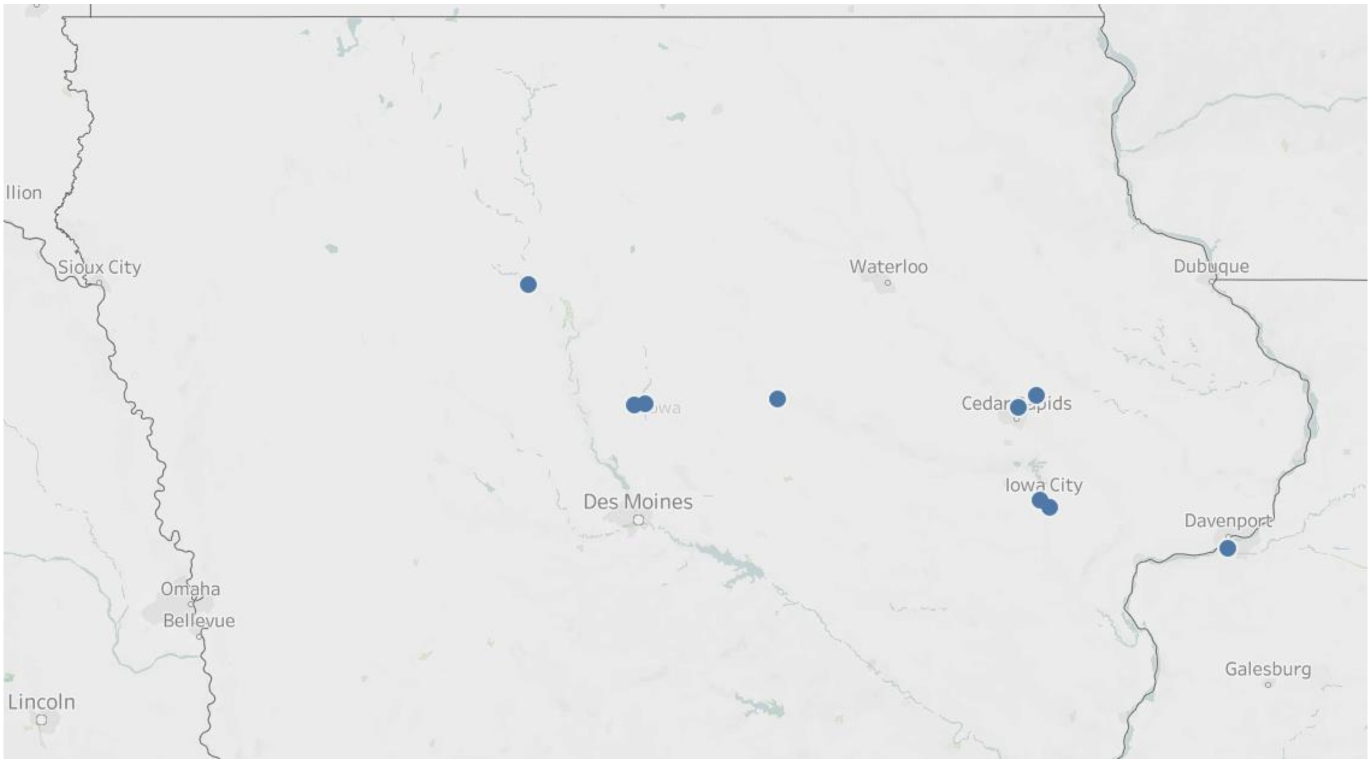
**Swimming Pools = 210 scored by the Sport Tourism Index™**

| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| Deck Space | 13 | 10 | 3 |
| Pool - Depth | 10 | 11 | -1 |
| 1m - Diving | 3 | 1 | 1 |
| 3m - Diving | 2 | 1 | 1 |
| 5m - Diving | 1 | 0 | 0 |
| 7.5m - Diving | 1 | 0 | 0 |
| 10m - Diving | 1 | 0 | 0 |
| Auxiliary meeting rooms | 3 | 2 | 1 |
| Diving Well | 90% | 29% | 61% |
| Hot Tub | 70% | 26% | 44% |
| Starting Blocks | 100% | 92% | 8% |
| Permanent restrooms | 100% | 99% | 1% |
| Permanent Wi-Fi | 100% | 86% | 14% |
| Parking | 90% | 96% | -6% |
| ADA Compliant | 100% | 96% | 4% |
| Ability to book (Definitely yes) | 100% | 54% | 46% |
| Score | 3.83 | 2.69 | 1.13 |

Best in Class: Texas A&M Natatorium (College Station, TX), Liberty University Natatorium (Lynchburg, VA), Huntsville Aquatics Center (Huntsville, AL), Florida Aquatics Swimming and Training (Gainesville, FL), Woollett Aquatics Center (Anaheim, CA), Mason Aquatic Center (Mason, OH), Hulbert Aquatic Facility (Fargo, ND).

When considering the 11 swimming pool facilities listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- Anne Greve Lund Natatorium (Visit Quad Cities)
- Campus Recreation & Wellness Center (Iowa City Area Sports Commission)
- Coe College Natatorium (Cedar Rapids Tourism)


llion
Sioux City
Waterloo
Dubuque
Cedar Rapids
Iowa
Des Moines
Iowa City
Davenport
Omaha
Bellevue
Galesburg
Lincoln

## Diamonds

**Diamonds = 994 scored by the Sport Tourism Index™**

| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| **Fields** | 17 | 5 | 12 |
| **Fields with lights** | 15 | 4 | 11 |
| **Artificial turf fields** | 9 | 1 | 8 |
| **Auxiliary meeting rooms** | 5 | 1 | 4 |
| **Covered dugouts** | 73% | 77% | -4% |
| **Stadium field** | 55% | 27% | 27% |
| **Permanent concession stand(s)** | 100% | 77% | 23% |
| **Permanent restrooms** | 100% | 98% | 2% |
| **Permanent Wi-Fi** | 73% | 38% | 34% |
| **Adequate Parking (60 spaces per field)** | 100% | 96% | 4% |
| **ADA Compliant** | 100% | 97% | 3% |
| **Ability to book (Definitely yes)** | 91% | 56% | 35% |
| **Score** | 4.04 | 2.27 | 1.76 |

Best in Class: Elizabethtown (KY), Grand Park (Westfield, IN), Great Park (Irvine, CA), Old Settlers Park (Round Rock, TX), North Softball Complex (Fargo, ND), Louisville Slugger Sports Complex (Peoria, IL), Champions Park (Gainesville, FL), FITTEAM Ballpark (Palm Beach, FL).

The table below displays the quantity of anchor or tournament-friendly facilities in neighboring states in comparison with Iowa.

| | Anchor Diamond Complexes | Tournament Friendly Diamond Complexes |
|---|---|---|
| **Iowa** | **0** | **7** |
| **Minnesota** | 1 | 1 |
| **Nebraska** | 0 | 7 |
| **Missouri** | 3 | 2 |
| **Wisconsin** | 1 | 0 |
| **Illinois** | 7 | 13 |

When considering the 26 diamond facilities listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- Harlan & Hazel Rogers Sports Complex (Visit Fort Dodge)
- Hunziker Youth Sports Complex (Discover Ames)
- TBK Bank Sports Complex (Visit Quad Cities)


As part of our strategic planning and facility feasibility studies, the Consultant Team routinely conducts economic impact analyses to assess the potential benefits of new facilities for the community, particularly from a sports tourism perspective. By leveraging local Average Daily Rates (ADR), spending patterns, and tax data, we estimate the projected economic activity that a new facility could generate. Given the multi-destination nature of this project across Iowa, we have utilized average tax rates, spending figures, and ADR data to provide a comprehensive overview of the potential impact. This analysis offers valuable insights into the anticipated benefits of venue development initiatives and serves as a foundation for informed decision-making. Using a conservative 25% capture rate for proven events that could fill the facility's calendar, the Consultant Team believes the following new economic activity could reasonably be realized over a calendar year:

- 10 new state, regional, and national tournaments.
- Over 27,000 total attendees relating to tournaments/competitions.
- More than $5.9 million in total visitor spending.
- Over 10,900 hotel room nights.
- Hotel Occupancy Taxes exceeding $62,000.
- Sales Tax collections over $367,000.
- Total sports tourism related taxes over $429,000.

## Hardwood Courts

**Indoor Courts = 506 scored by the Sport Tourism Index™**

| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| # Basketball Courts | 15 | 3 | 12 |
| # Volleyball Courts | 27 | 4 | 23 |
| Court Surface (Hardwood) | 80% | 77% | 3% |
| Scoreboard | 90% | 82% | 8% |
| Scorers' Table | 90% | 90% | 0% |
| Team Benches | 60% | 56% | 4% |
| PA System | 60% | 58% | 2% |
| Locker Rooms | 70% | 73% | -3% |
| Permanent concession stand(s) | 100% | 76% | 24% |
| Permanent restrooms | 100% | 99% | 1% |
| Permanent Wi-Fi | 100% | 88% | 12% |
| Parking | 100% | 98% | 2% |
| ADA Compliant | 100% | 99% | 1% |
| Auxiliary meeting rooms | 9 | 3 | 6 |
| Ability to book (Definitely yes) | 80% | 49% | 31% |
| Score | 4.12 | 2.81 | 1.31 |

National Best in Class: American Sports Center (Anaheim, CA), Bell Bank Park (Mesa, AZ), Community First Champions Center (Grand Chute, WI), Hoover Met Complex (Hoover, AL), LakePoint Champions Center (Cartersville, VA), Myrtle Beach Sports Center (Myrtle Beach, SC), Omaha Sports Academy (Omaha, NE), Rock Hill Sports Complex (Rock Hill, NC), Rocky Mount Events Center (Rocky Mount, NC), Virginia Beach Sports Center (Virginia Beach, VA).

The table below displays the quantity of anchor or tournament-friendly facilities in neighboring states in comparison with Iowa.

| | Anchor Hardwood Court Facilities | Tournament Friendly Hardwood Court Facilities |
|---|---|---|
| Iowa | **4** | **11** |
| Minnesota | 2 | 2 |
| Nebraska | 3 | 6 |
| Missouri | 2 | 4 |
| Wisconsin | 3 | 7 |
| Illinois | 8 | 9 |

When considering the 22 indoor court facilities listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- Fort Dodge Senior High (Visit Fort Dodge)
- Greenstate Family Fieldhouse (Iowa City Area Sports Commission)
- University of Iowa Fieldhouse (Iowa City Area Sports Commission)


As part of our strategic planning and facility feasibility studies, the Consultant Team routinely conducts economic impact analyses to assess the potential benefits of new facilities for the community, particularly from a sports tourism perspective. By leveraging local Average Daily Rates (ADR), spending patterns, and tax data, we estimate the projected economic activity that a new facility could generate. Given the multi-destination nature of this project across Iowa, we have utilized average tax rates, spending figures, and ADR data to provide a comprehensive overview of the potential impact. This analysis offers valuable insights into the anticipated benefits of venue development initiatives and serves as a foundation for informed decision-making. Using a conservative 25% capture rate for proven events that could fill the facility's calendar, the Consultant Team believes the following new economic activity could reasonably be realized over a calendar year:

- 11 new state, regional, and national tournaments.
- Over 21,500 total attendees relating to tournaments/competitions.
- More than $5.2 million in total visitor spending.
- Over 10,000 hotel room nights.
- Hotel Occupancy Taxes exceeding $56,000.
- Sales Tax collections over $323,000.
- Total sports tourism related taxes over $380,000.

## Golf Courses

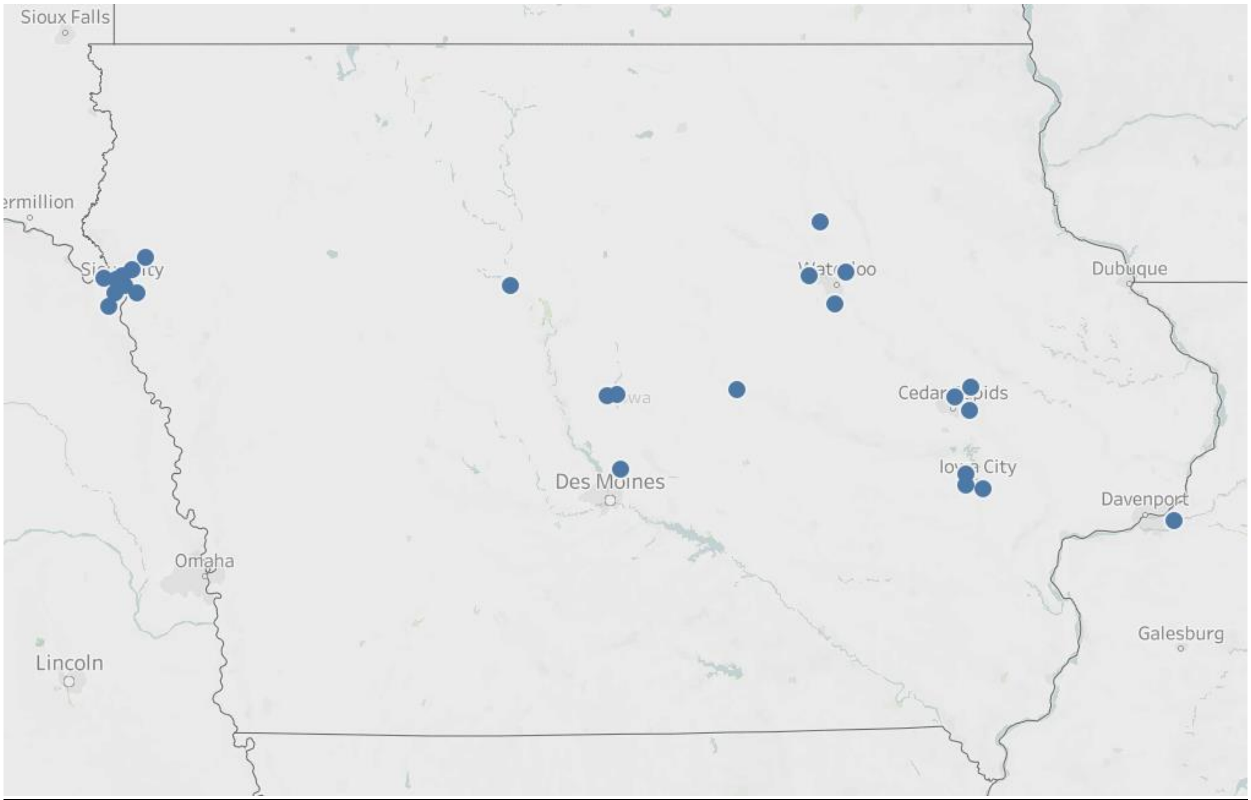
**Golf Courses = 493 scored by the Sport Tourism Index™**

| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| **Holes** | 57.6 | 19.4 | 38.2 |
| **Course Length** | 7,081.3 | 7,881.7 | (800.4) |
| **Auxiliary meeting rooms** | 10.3 | 2.1 | 8.2 |
| **Clubhouse** | 100% | 85% | 15% |
| **Driving Range** | 100% | 85% | 15% |
| **Putting Green** | 100% | 94% | 6% |
| **Short Game** | 100% | 83% | 17% |
| **Permanent restrooms** | 100% | 100% | 0% |
| **Permanent Wi-Fi** | 100% | 85% | 15% |
| **Parking** | 100% | 96% | 4% |
| **ADA Compliant** | 100% | 96% | 4% |
| **Ability to book (Definitely yes)** | 80% | 32% | 48% |
| **Score** | 4.62 | 3.52 | 1.10 |

National Best in Class: PGA National Resort & Spa (West Palm Beach, FL), Crestview Country Club (Wichita, KS), Fords Colony Country Club (Williamsburg, VA), Grand National – Robert Trent Jones Golf Trail (Auburn, AL), Rotonda Golf & Country Club (Port Charlotte, FL), The Refuge (Flowood, MS), The Landings Golf Club (Savannah, GA).

When considering the 36 golf courses listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- Covington Links Golf Course (Catch Des Moines)
- Otter Creek Golf Course (Explore Sioux City)
- TPC Deere Run (Visit Quad Cities)


Sioux Falls
Vermillion
Sioux City
Waterloo
Dubuque
Cedar Rapids
Iowa
Iowa City
Des Moines
Davenport
Omaha
Galesburg
Lincoln

**Pickleball**

**Pickleball Courts = 153 scored by the Sport Tourism Index™**

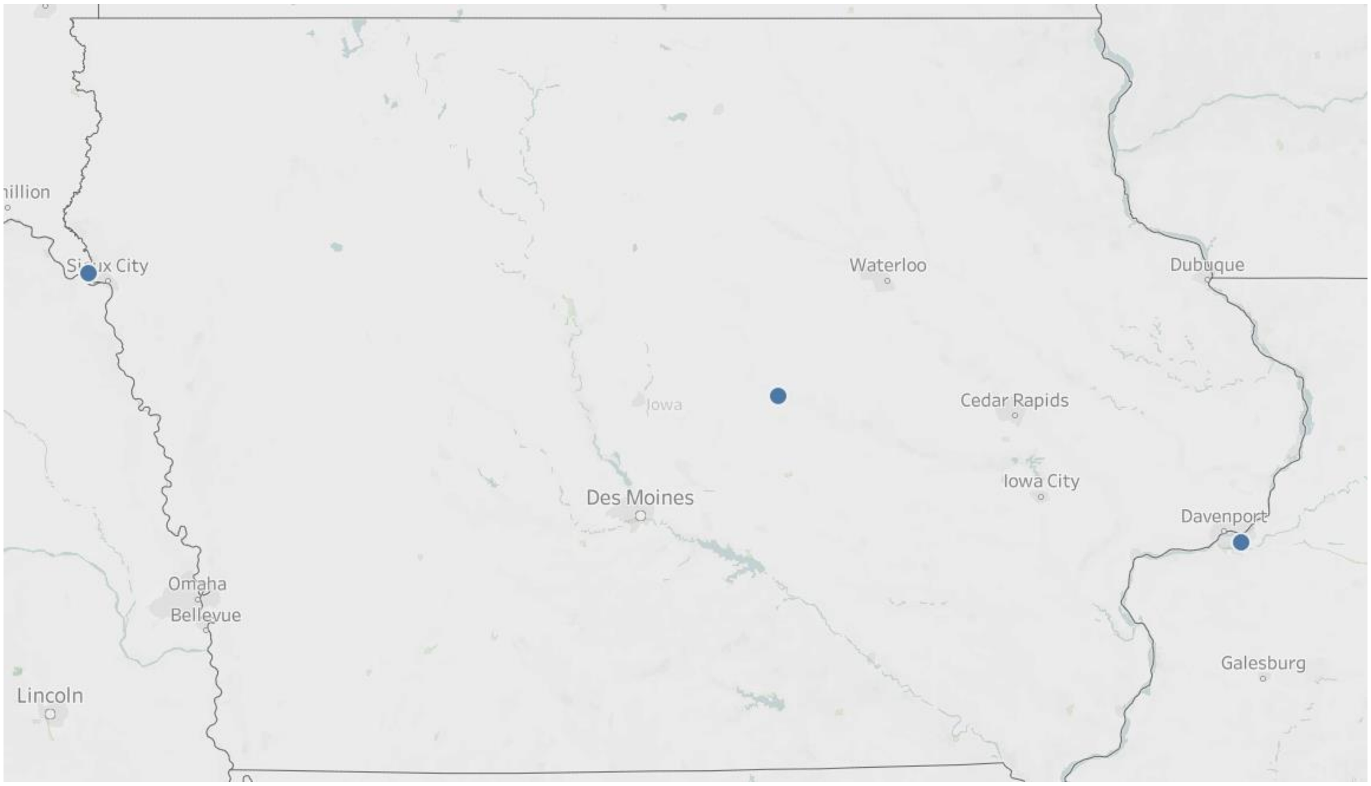
| | AVERAGES | | |
|---|---|---|---|
| | Top 10 | Overall | Difference |
| Total Courts | 19 | 4 | 14 |
| # of Indoor Courts | 9 | 3 | 6 |
| Outdoor Courts with Lights | 7 | 5 | 2 |
| Auxiliary Meeting Rooms | 6 | 1 | 4 |
| Scoreboards | 73% | 22% | 51% |
| Stadium Court | 73% | 15% | 58% |
| Benches at Each Court | 100% | 67% | 33% |
| Locker Rooms | 100% | 35% | 65% |
| Permanent Concessions | 91% | 43% | 48% |
| Adequate Parking | 100% | 93% | 7% |
| Permanent Wi-Fi | 100% | 50% | 50% |
| ADA Compliant | 100% | 94% | 6% |
| Ability to book (Definitely yes) | 82% | 48% | 34% |
| Score | 3.75 | 2.45 | 1.31 |

The table below displays the quantity of anchor or tournament-friendly facilities in neighboring states in comparison with Iowa.

| | Anchor Pickleball Facilities | Tournament Friendly Pickleball Facilities |
|---|---|---|
| Iowa | **0** | **1** |
| Minnesota | 0 | 0 |
| Nebraska | 0 | 0 |
| Missouri | 0 | 1 |
| Wisconsin | 0 | 2 |
| Illinois | 1 | 3 |

When considering the six (6) pickleball facilities listed on the Sports Tourism Index™ in the state of Iowa (shown on the map below), the following is an alphabetical list of some of the top three sports tourism-driving facilities, sorted by facility name.

- United Sports Academy (Explore Sioux City)
- Veteran's Memorial Colisseum (Marshalltown Area Chamber of Commerce)
- YMCA-YWCA Pickleball Courts (Marshalltown Area Chamber of Commerce)




As part of our strategic planning and facility feasibility studies, the Consultant Team routinely conducts economic impact analyses to assess the potential benefits of new facilities for the community, particularly from a sports tourism perspective. By leveraging local Average Daily Rates (ADR), spending patterns, and tax data, we estimate the projected economic activity that a new facility could generate. Given the multi-destination nature of this project across Iowa, we have utilized average tax rates, spending figures, and ADR data to provide a comprehensive overview of the potential impact. This analysis offers valuable insights into the anticipated benefits of venue development initiatives and serves as a foundation for informed decision-making. Using a conservative 25% capture rate for proven events that could fill the facility's calendar, the Consultant Team believes the following new economic activity could reasonably be realized over a calendar year:

- 12 new state, regional, and national tournaments.
- Over 12,500 total attendees relating to tournaments/competitions.
- Close to $3.0 million in total visitor spending.
- Nearing 6,500 hotel room nights.
- Hotel Occupancy Taxes exceeding $55,000.
- Sales Tax collections over $182,000.
- Total sports tourism related taxes over $238,000.

# Iowa State Tourism Data
# Economic Impact

In the following section, the Consultant Team will provide an in-depth analysis of the economic impact generated by the 472 sport tourism events held in the state of Iowa that were provided by 16 organizations (14 destinations and two venues). These events have played a significant role in stimulating economic activity across various sectors within the state. The Consultant Team used tax rates, local / day-trip / overnight spending numbers, and Average Daily Hotel Rates from each of the cities that the events took place. It is important to note that these economic impact numbers do not include the full economic impact generated from Ragbrai (only 2 cities submitted data regarding Ragbrai) and the Field of Dreams. Across the 472 sport tourism events that were provided to the Consultant Team, the following economic impact was generated:

- Over 1,370,000 total attendees relating to tournaments/competitions, approximate divisions below:
  - 417,000 Athletes
  - 935,500 Spectators
  - 18,000 Administrators
- Close to $278,700,000 million in total visitor spending.
- Over 428,000 hotel room nights.
- Hotel Occupancy Taxes exceeding $2,800,000.
- Sales Tax collections over $17,800,000.
- Other Hotel Night Additions over $392,000.
- Total sports tourism related taxes over $21,000,000.

Below is a list of the top 10 sports by their total economic impact in Iowa, Collectively, these sports played a vital role in stimulating economic activity across various sectors within Iowa, underscoring the diverse and multifaceted nature of the state's sports tourism industry.

1. Baseball: $116,409,443
2. Multi-Sport*: $39,621,259
3. Football: $30,820,082
4. Wrestling: $15,107,184
5. Basketball: $11,440,940
6. Volleyball: $11,350,046
7. Cheer & Dance: $10,455,117
8. Soccer: $9,844,213
9. Golf: $6,656,450
10. Cycling: $4,573,592

* Multi-Sport includes events like the Special Olympics, AAU Junior Olympics, Iowa Senior Games, etc.

To accurately assess the average economic impact (EI) of events from the top 10 sports in the destinations, we excluded outliers —specifically, events with an EI greater than 10 times the average EI or less than 10% the average EI. This adjustment resulted in the table below:

| Sport | Average Impact Per Event | # Normal Events | # Outlier Events |
|---|---|---|---|
| **Baseball** | $294,566.16 | 123 | 2 |
| **Multi-Sport** | $1,059,878.41 | 9 | 1 |
| **Football** | $147,521.91 | 4 | 1 |
| **Wrestling** | $406,556.93 | 28 | 1 |
| **Basketball** | $309,214.59 | 37 | 0 |
| **Volleyball** | $241,094.52 | 19 | 1 |
| **Cheer & Dance** | $373,397.05 | 28 | 0 |
| **Soccer** | $317,126.57 | 31 | 2 |
| **Golf** | $68,800.24 | 8 | 2 |
| **Cycling** | $93,935.18 | 6 | 2 |

## Iowa State Tourism Data
## Trade Shows

The consultant team surveyed the participating organizations to gather information on the trade shows they attend annually, including the number of attendees and the events they've won from these shows. Upon analyzing the data, we discovered that attributing event wins to specific shows can be challenging for some organizations due to the lengthy process involved in transitioning from initial meetings to event hosting. Many organizations adopt a strategy that focuses on nurturing relationships rather than pinpointing individual shows as direct sources of business. According to this strategy, organizations prioritize building strong ties with several rights holders present at these shows, viewing attendance as a means of fostering relationships and securing business opportunities over time.

Upon review, the data revealed that the SportsETA Symposium and TEAMS Conference stood out as the most frequented trade shows. Six different organizations participated in the annual SportsETA Symposium, with a collective attendance of 11 individuals. Similarly, the TEAMS Conference garnered attention, drawing six organizations with a total representation of six attendees.

Interestingly, four organizations informed the Consultant Team that they abstained from personal attendance at any trade shows in the previous year. Instead, these organizations opted to sponsor or co-host events with iTIP, a strategic decision aimed at maximizing exposure and networking opportunities while not being present at the tradeshows themselves.

While attributing specific events to specific shows posed challenges as mentioned in the first paragraph, some organizations provided insights into the shows associated with their event wins. Notably, the SportsETA Conference emerged as a significant contributor, with a total of nine events attributed to this conference alone. This data underscores the importance of strategic participation in trade shows for securing business opportunities and fostering industry relationships.

# Iowa State Tourism Data
# Rural Community Sports Participation

A part of this project was aimed at identifying sports opportunities for the more rural communities that are part of iTIP. The Consultant team chose the following rural communities to conduct a deeper analysis regarding sports participation within a 60-minute, 120-minute, and 300-minute driving radius. The Consultant Team's goal is for all communities within iTIP to recognize that sports tourism extends beyond traditional bat-and-ball sports. To fully capitalize on sports tourism opportunities, communities must focus on specific niches and excel in them.

The following tables utilize demographic data from ESRI (the Environmental Systems Research Institute) to determine the number of people participating in specific sports in 2023. This participation figure is then compared to the US average among areas of similar size using the Market Potential Index (MPI). A score of 100 indicates parity with the US average, while a score above 100 suggests a higher participation rate compared to the national average (for example, a score of 115 indicates 15% above US average).

**Amana Colonies**

| | 60 Minute Driving Radius | MPI | 120 Minute Driving Radius | MPI | 300 Minute Driving Radius | MPI |
|---|---|---|---|---|---|---|
| **Archery** | 11,990 | 113 | 54,762 | 112 | 622,123 | 104 |
| **Boating (Power)** | 24,999 | 119 | 116,858 | 121 | 1,258,158 | 106 |
| **Canoeing or Kayaking** | 37,391 | 114 | 173,029 | 115 | 1,964,632 | 106 |
| **Fishing (Fresh Water)** | 55,810 | 121 | 261,259 | 124 | 2,714,234 | 104 |
| **Frisbee** | 17,436 | 116 | 77,527 | 112 | 898,135 | 106 |
| **Hunting w/Rifle** | 18,297 | 124 | 88,080 | 130 | 859,871 | 103 |
| **Hunting w/Shotgun** | 13,258 | 122 | 64,077 | 129 | 635,052 | 103 |
| **Motorcycling** | 12,897 | 112 | 58,635 | 111 | 652,814 | 100 |
| **Target Shooting** | 25,292 | 116 | 118,273 | 118 | 1,274,623 | 103 |

### Buchanan County

| | 60 Minute Driving Radius | MPI | 120 Minute Driving Radius | MPI | 300 Minute Driving Radius | MPI |
|---|---|---|---|---|---|---|
| **Archery** | 11,588 | 114 | 32,843 | 115 | 546,413 | 104 |
| **Boating (Power)** | 25,073 | 125 | 72,699 | 129 | 1,102,301 | 106 |
| **Canoeing or Kayaking** | 36,882 | 117 | 104,093 | 118 | 1,719,757 | 106 |
| **Fishing (Fresh Water)** | 56,258 | 128 | 165,373 | 134 | 2,378,735 | 105 |
| **Frisbee** | 16,558 | 115 | 47,490 | 117 | 789,076 | 106 |
| **Hunting w/Rifle** | 19,013 | 134 | 58,939 | 148 | 757,476 | 104 |
| **Hunting w/Shotgun** | 13,869 | 133 | 41,872 | 143 | 558,745 | 104 |
| **Target Shooting** | 25,294 | 121 | 73,062 | 124 | 1,121,021 | 104 |

### Charles City

| | 60 Minute Driving Radius | MPI | 120 Minute Driving Radius | MPI | 300 Minute Driving Radius | MPI |
|---|---|---|---|---|---|---|
| **Archery** | 6,314 | 114 | 30,644 | 114 | 375,384 | 111 |
| **Boating (Power)** | 14,531 | 133 | 68,505 | 129 | 775,601 | 116 |
| **Canoeing or Kayaking** | 20,505 | 120 | 98,441 | 119 | 1,180,967 | 113 |
| **Fishing (Fresh Water)** | 33,665 | 140 | 154,407 | 133 | 1,717,688 | 117 |
| **Frisbee** | 9,263 | 118 | 44,533 | 117 | 527,425 | 110 |
| **Horseback Riding** | 4,675 | 107 | 22,780 | 107 | 278,046 | 104 |
| **Hunting w/Rifle** | 12,414 | 161 | 54,585 | 146 | 568,265 | 121 |
| **Hunting w/Shotgun** | 8,799 | 156 | 38,779 | 141 | 411,851 | 119 |
| **Target Shooting** | 14,330 | 126 | 68,338 | 124 | 792,363 | 114 |

### Fairfield CVB

| | 60 Minute Driving Radius | MPI | 120 Minute Driving Radius | MPI | 300 Minute Driving Radius | MPI |
|---|---|---|---|---|---|---|
| **Archery** | 4,786 | 116 | 37,304 | 111 | 515,052 | 103 |
| **Boating (Power)** | 11,304 | 139 | 80,088 | 121 | 1,052,283 | 106 |
| **Canoeing or Kayaking** | 15,706 | 124 | 118,179 | 114 | 1,632,555 | 105 |
| **Fishing (Fresh Water)** | 26,669 | 150 | 181,454 | 125 | 2,277,376 | 105 |
| **Frisbee** | 6,690 | 115 | 52,340 | 110 | 745,956 | 105 |
| **Hunting w/Rifle** | 10,577 | 185 | 61,982 | 133 | 729,746 | 105 |
| **Hunting w/Shotgun** | 7,288 | 174 | 45,024 | 131 | 536,795 | 105 |
| **Motorcycling** | 5,167 | 116 | 40,389 | 111 | 544,329 | 100 |
| **Target Shooting** | 11,422 | 135 | 81,698 | 118 | 1,065,415 | 103 |

### Keokuk

| | 60 Minute Driving Radius | MPI | 120 Minute Driving Radius | MPI | 300 Minute Driving Radius | MPI |
|---|---|---|---|---|---|---|
| **Archery** | 4,886 | 115 | 23,258 | 113 | 495,529 | 102 |
| **Boating (Power)** | 11,070 | 132 | 51,160 | 126 | 1,012,270 | 106 |
| **Canoeing or Kayaking** | 15,746 | 120 | 73,829 | 116 | 1,571,123 | 105 |
| **Fishing (Fresh Water)** | 25,786 | 140 | 119,141 | 134 | 2,201,961 | 105 |
| **Frisbee** | 6,565 | 109 | 32,458 | 112 | 716,112 | 105 |
| **Hunting w/Rifle** | 9,858 | 167 | 43,519 | 152 | 708,889 | 105 |
| **Hunting w/Shotgun** | 7,035 | 162 | 31,021 | 148 | 522,398 | 106 |
| **Motorcycling** | 5,239 | 114 | 25,278 | 113 | 526,478 | 100 |
| **Target Shooting** | 11,213 | 129 | 52,120 | 124 | 1,027,605 | 103 |

Across Amana Colonies, Buchanan County, Charles City, Fairfield CVB, and Keokuk, there is a consistent interest in outdoor pursuits such as hunting, fishing, boating, and target shooting. These communities can leverage their natural assets and recreational amenities to attract visitors seeking outdoor experiences. Potential strategies include organizing hunting or fishing tournaments, hosting outdoor adventure events, developing boat landings, and more. Each community's unique strengths, such as high participation rates in specific activities like hunting with rifles and shotguns in Amana Colonies and Buchanan County, or fishing and boating in Charles City and Keokuk, provide ample opportunities for targeted sports tourism initiatives. By strategically capitalizing on these strengths and catering to niche interests, these rural communities can enhance their appeal and stimulate economic growth through sports tourism. As demonstrated by the Market Potential Index (MPI) data, which compares participation rates to the national average, these communities are well-positioned to capitalize on their outdoor recreation offerings and establish themselves as premier destinations for sports enthusiasts.

# Iowa State Tourism Data
## Recommendations

The enclosed primary recommendations include three (3) opportunities for an enhanced sports tourism marketing program. While the scope of work for this project also had a focus on facility opportunities, it is likely that an improved sports tourism marketing effort would deliver returns much earlier than the development of an entirely new venue or the enhancement of existing facilities. The primary recommendations are listed on the following pages along with more detail for each concept.

Primary Recommendations – Organizational Strategies (Shorter Term)

1. **Regional Competition** – The regional competition in the sports tourism industry is exceptionally intense, particularly in areas like the Midwest and the Southeast. Within these regions, the majority of sports tourism-focused destinations are similar to many of those analyzed in Iowa during this project, falling into the tier 2 and tier 3 city categories. To effectively compete in this dynamic landscape, destinations must adopt strategic approaches tailored to their unique circumstances. With limited resources at their disposal, destinations are compelled to make smart decisions regarding their sports tourism initiatives. This entails leveraging their strengths, whether they lie in facilities, geographical attractions, or community engagement, to carve out a distinctive position in the market. By deploying resource-efficient strategies, destinations can enhance their competitiveness and maximize their appeal to sports event organizers, athletes, and spectators alike.

   **Examples of Actual Strategic Approaches:**

   1. **Statewide Sports Approach and Facility Collaboration:** A significant part of a strategic approach involves a statewide sports strategy, where collaboration between different cities within the state is crucial. This strategy prevents multiple cities from developing the same facilities and competing against each other. Instead, it promotes a unified effort where cities can specialize in different types of facilities, ensuring that resources are efficiently utilized, and facilities are adequately filled. For example, one city may focus on building a premier basketball arena, while another may develop top-tier soccer fields. This collaboration helps avoid redundancy and maximizes the utilization of each facility, thereby enhancing the overall sports tourism appeal of the state.

   2. **Unified Marketing Efforts:** Another critical aspect of the strategy is unified marketing efforts, such as those already seen with iTIP at conferences. By presenting a cohesive front at conferences and marketing events, all destinations that are part of iTIP benefit from shared visibility and support. This unity helps promote all participating destinations, ensuring that even if one city does not have the facilities to host a specific event, it can recommend another city within the state. This approach ensures that events remain within the state rather than moving to a different state, maintaining economic benefits within Iowa.

2. **Broaden the Definition of Sport** – Communities should focus on developing sports tourism where it is wanted/needed. Before doubling down on sports tourism, it’s a good idea to gauge the interest of community stakeholders and to perform a demographic analysis. Destinations could also benefit from broadening the definition of sport. For instance, 'silent sports'—activities like hiking, kayaking, and cycling—have witnessed increased popularity since the onset of the pandemic. Rural

communities boasting natural assets such as waterways and trails should leverage these resources for leisure sports tourism. This strategy entails not only promoting these natural venues but also ensuring their accessibility to visitors. By capitalizing on these outdoor offerings, rural destinations can position themselves as attractive destinations for individuals seeking active and scenic leisure pursuits, thereby diversifying their tourism portfolio and fostering economic growth.

3. **Sports Tourism Driving Facilities are Key** – The arms race of sports tourism is in full force. Destinations around the country are continuously looking for a facility/facilities to provide them an edge and guarantee events for years to come. While a lot of projects begin at the request of a disgruntled parent/community stakeholder, ALL projects should first start with feasibility. Feasibility is crucial to providing the short-term and long-term viability of a facility, as well as the appetite of the key players in the project. Funding can sometimes be the trickiest part. However, the old methods of phased projects and publicly funded facilities are not the only ways to get to ribbon-cutting. New routes are now present in the marketplace, helping destinations get from feasibility to grand-opening in much less time (sometimes as short as 24-months). Management can also be a cog in the wheel sometimes. In today's tourism industry, there are new ways of maximizing on effectiveness and efficiency. Third-party companies can provide bench support, acting as a true "sports commission in a box," handling everything from event outreach and booking to on-ground event staff and logistics.

Secondary Recommendations – Facility "Tool Kit" Opportunities (Longer Term)

1. **Indoor Facility** – The need for an indoor facility was a recurring theme emphasized in numerous interviews conducted by the Consultant Team. Respondents consistently highlighted the demand for a versatile indoor venue, particularly one equipped with hydraulic features and an indoor track that could accommodate various sports and events. This sentiment was echoed by data provided by Huddle Up Group, indicating that indoor hydraulic tracks and dedicated cross country courses are among the most underserved venue types. Interestingly, the analysis revealed a significant gap in the availability of such facilities across the Midwest and Rocky Mountain regions. Specifically, the absence of indoor hydraulic tracks outside university-controlled facilities was notable, with only limited options located in distant areas such as Louisville and Spokane. This scarcity underscores the pressing need for accessible indoor venues in these regions, presenting a compelling opportunity for potential development to meet the growing demand for sports facilities and events.

2. **Pickleball Dedicated Facility** – Establishing an anchor and tournament-friendly Pickleball-dedicated facility presents a unique opportunity to revitalize an outdated and underused venue. An anchor facility of this nature typically comprises 32 to 60 courts, while a tournament-friendly setup would include 8 to 16 courts for local events and 24 to 32 courts for regional tournaments. A compelling example of such a project is the Macon initiative in Georgia. In Macon, the mayor spearheaded the transformation of an old JC Penny's into a state-of-the-art indoor facility boasting 32 courts dedicated to Pickleball. This ambitious redevelopment has already proven successful, with the facility hosting a USA Pickleball Regional event and poised to accommodate additional national-level tournaments sanctioned by the PPA. The Macon project serves as an inspiring model for communities seeking to repurpose outdated spaces into vibrant hubs for sports tourism and recreational activities, showcasing the potential for innovative urban renewal initiatives in similar locales.

3. **Enhancing Flat Fields & Diamonds** – From the Economic Impact calculations, we can see that baseball, football & soccer are both in the top 10 as far as economic impact goes. This shows that the destinations in Iowa already have well-established relations with rights holders of these sports and that there is an interest for these events. The Consultant Team believes that destinations can build on this existing success by enhancing some of the existing flat fields and diamonds to include synthetic turf fields with ample parking/access.

   Industry best practices advocate for incorporating turf on at least 25% of all fields within a sports facility, a recommendation that gains further importance in northern climates. Turf fields not only offer increased usability but also serve as a viable solution during weather-related delays. Moreover, the installation of artificial turf can significantly extend a facility's playing season, particularly beneficial during shoulder seasons, thereby providing a substantial economic boost. Furthermore, artificial turf facilitates the expansion of playing seasons for local and community user groups. Specifically, for diamond fields, fully turfing a field enables each full-size field to be converted into two youth fields, offering versatility for baseball and softball. Notably, there is currently only one flat field facility and no diamond facilities in Iowa meeting this benchmarking requirement. Synthetic fields also exhibit a direct, positive correlation with the duration of field utilization. With increased field usage, tournament organizers can accommodate more teams and games during events, resulting in greater economic impact.

   Data from the Sports Venue Calculator Group, specializing in sports venue construction and maintenance cost estimates, underscores the advantages of turf fields. Artificial turf fields are available for an average of 2,800 hours of use per year, compared to just 800 hours for grass fields. This extended "up-time," combined with lower maintenance requirements relative to grass fields, often results in artificial turf fields being more cost-effective over the long term.

# Iowa State Tourism Data
## Conclusion

For the state of Iowa to be relevant in the sports market, iTIP and its sports tourism stakeholders must continue to build bridges with key players locally and within the state to pave the way for asset development over the long term.

The addition of an improved sports tourism marketing strategy and the execution of the enclosed recommendations will empower iTIP and local event/venue operators to create home-grown participant driven events, enhance their existing venues, and host more bid-in regional/national championships. To achieve these lofty aspirations, iTIP has a heavy lift ahead, but by forging this path, the destinations that are part of iTIP will be better positioned regionally and nationally as strong players in the sports tourism industry <u>while also providing better opportunities for local youth through sports</u>. To raise the bar in the state of Iowa, and to positively impact the community, iTIP's leadership should focus its efforts on three (3) overarching objectives:

1. Create a culture of sports and events <u>development</u>. Fostering a culture of sports and events development involves developing human capital (staff and volunteer base), fostering relationships with local stakeholders and regional/national event owners, securing funding for sports tourism initiatives, and developing physical products like venues. By empowering staff and volunteers, building strong partnerships, and creating sustainable revenue streams, Iowa can establish itself as a dynamic sports tourism destination capable of hosting a wide range of events while enriching the lives of residents and visitors alike.

2. Expanding the definition of sports beyond traditional categories to include activities like hiking, kayaking, and cycling allows Iowa to capitalize on the growing popularity of "silent sports." By promoting outdoor leisure pursuits, particularly in rural areas rich in natural assets like waterways and trails, Iowa can diversify its tourism offerings and attract visitors seeking active and scenic experiences.

3. Investing in facility enhancements, including the development of versatile indoor venues, dedicated Pickleball facilities, and synthetic turf enhancements for flat fields and diamonds, is crucial for meeting the evolving demands of sports tourism. These improvements not only attract regional and national events but also extend playing seasons, provide weather-resistant solutions, and catalyze economic growth in local communities.

As with any new project, there are numerous variables that need to be considered when evaluating the ROI and risk in developing new sports facilities. In the experience of the Consultant Team, destinations who consider the overall impact on their community and its citizens will have more success, and see a higher level of collaboration, than those that measure purely by room nights or bed tax collections. This community-wide effort will help Iowa connect the tourism and business communities in an ongoing and proactive manner into the future.

In the eyes of the Consultant Team, the puzzle pieces exist for Iowa to expand economic development for the area through sports tourism. The Consultant Team believes it is within the power of the community's sports stakeholders to capture more opportunities in the sports tourism and events market while also enriching the lives of its citizens.