

SPORT TOURISM MARKET ANALYSIS

FINAL PRESENTATION





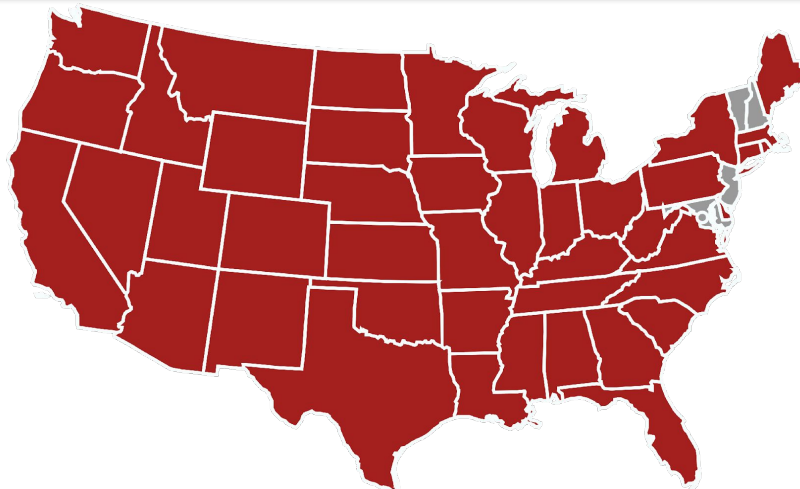
FOUNDED IN 2012

As a sports tourism industry consulting company, we continually strive for strategic growth and increased community collaboration for our partners.

From starting as athletes and coaches to becoming industry professionals, a major differentiator for the Huddle Up Group is our team's experience in the sports tourism trenches.

We have personally led or worked on/with:

- Award winning sports commissions
- Multiple Olympic Games
- Youth tournaments
- Facility development
- National championship management
 - Final Fours
 - All-Star Games
 - New event creation
 - Capital campaigns/fundraising
 - College Bowl Games



2017 NASC Superior Service Award Winner
The highest honor a consulting firm can earn
from the National Association of Sports
Commissions

200+

PROJECTS

400+

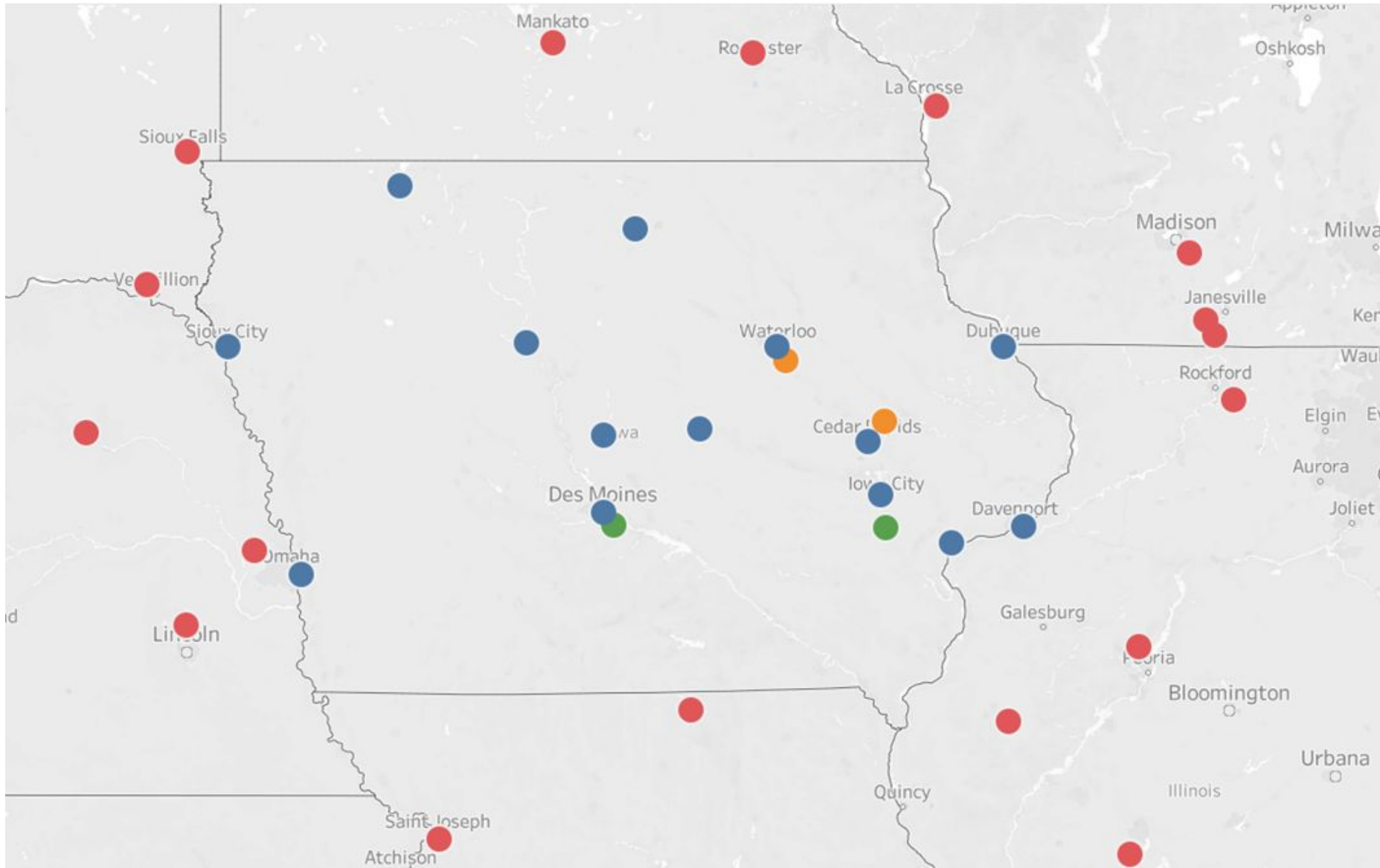
**DESTINATIONS
+ PARTNERS**

100+

**SPEAKING
ENGAGEMENTS**

METHODOLOGY

1. Onboarding Call
2. 18 stakeholder interviews & 16 data collections (listed on next page)
3. Sports Tourism IndexTM analysis of iTIP destinations
4. Economic impact, facility inventory and overall sports tourism analysis of Iowa
5. Comprehensive needs analysis to address unique needs of iTIP (including short and long term recommendations)
6. Creation and delivery of the sports tourism analysis



The blue circles are destinations, the green circles are rights holders, and the orange circles are venues. The red circles around the state of Iowa are other surrounding destinations that have doubled down on sports tourism.



IOWA GEOGRAPHY

- Cities within 5-hour drive

- Indianapolis, Jefferson City, Kansas City, Madison, Milwaukee, Minneapolis, Omaha, Springfield, St. Louis, St. Paul, Topeka, Wichita, Lincoln.

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 (4% higher than US average)	72,560,093

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



THE SPORT TOURISM INDEX™ IS THE INDUSTRY'S FIRST TOOL EVER CREATED TO MEASURE THE CURRENT EFFECTIVENESS AND FUTURE POTENTIAL OF A SPORTS TOURISM AND EVENTS ORGANIZATION IN THREE AREAS:



DESTINATION'S STRENGTHS

The destination's strengths as a sports tourism community.



OPPORTUNITIES

The destination's areas of opportunity as a sports tourism community.



COMPETITIVE ANALYSIS

The destination's standing relative to its competitive set.

The Sports Tourism Index™ was built with the input of numerous sports tourism and event leaders, utilizing national best practices in the four measurement areas that make up the Index:



FACILITIES



DESTINATION STRENGTH



ORGANIZATION STRUCTURE



EVENTS

Each measurement area consists of 25 points that add up to 100 for the total Sports Tourism Index™ score.

iTIP Sports Tourism Index™

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

iTIP Sports Tourism Index™

- **Bid Batting Average**

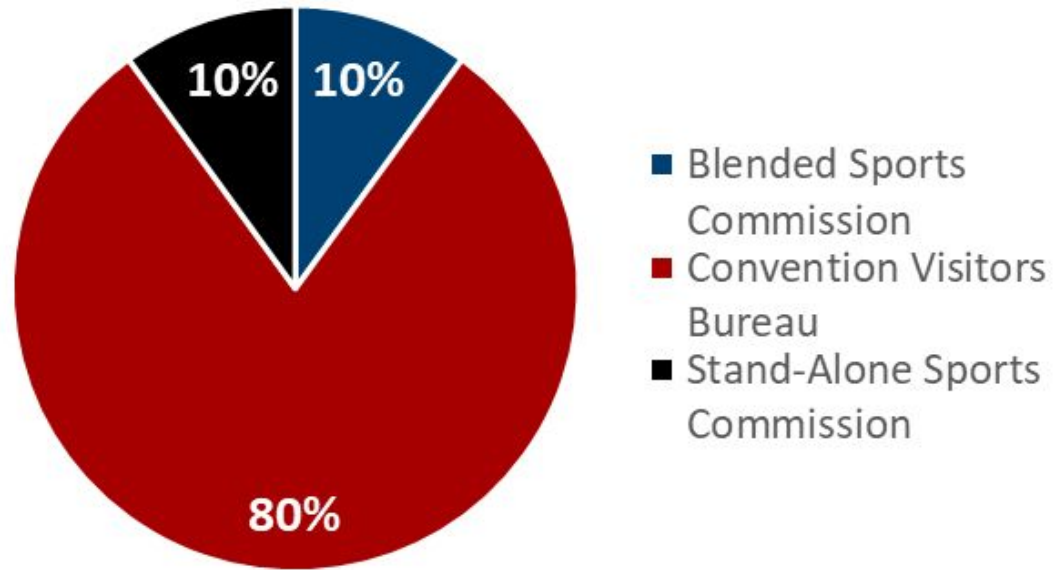
- Bid Batting Average is a metric used to gauge the effectiveness of a destination's event bid submissions. It represents the ratio of event bids won compared to the total number of event bids submitted. A Bid Batting Average of 100% indicates that every event bid submitted by the destination has been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

- **ITIP Batting Average**

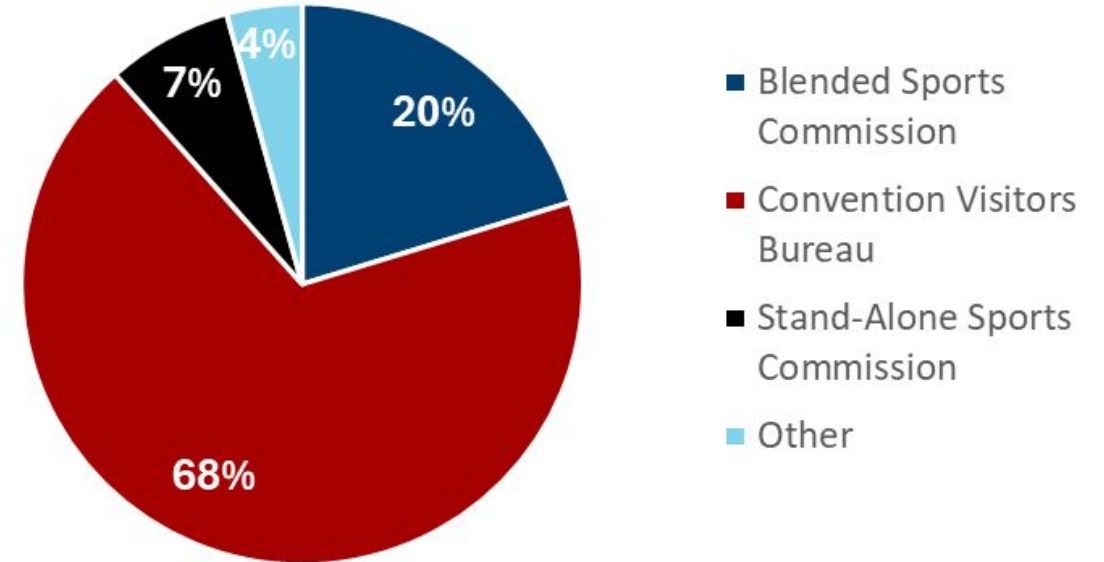
- 49%, Iowa ranks 24th in terms of Bid Batting Average nationwide
- The top 10 states on the Sports Tourism Index™ boast Bid Batting Averages ranging from 67% to 86%.
- The average Bid Batting Average across the Midwest region is 53%, ranking 7th out of 13
 - (Midwest Region: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Wisconsin)



iTIP Sports Tourism Index™

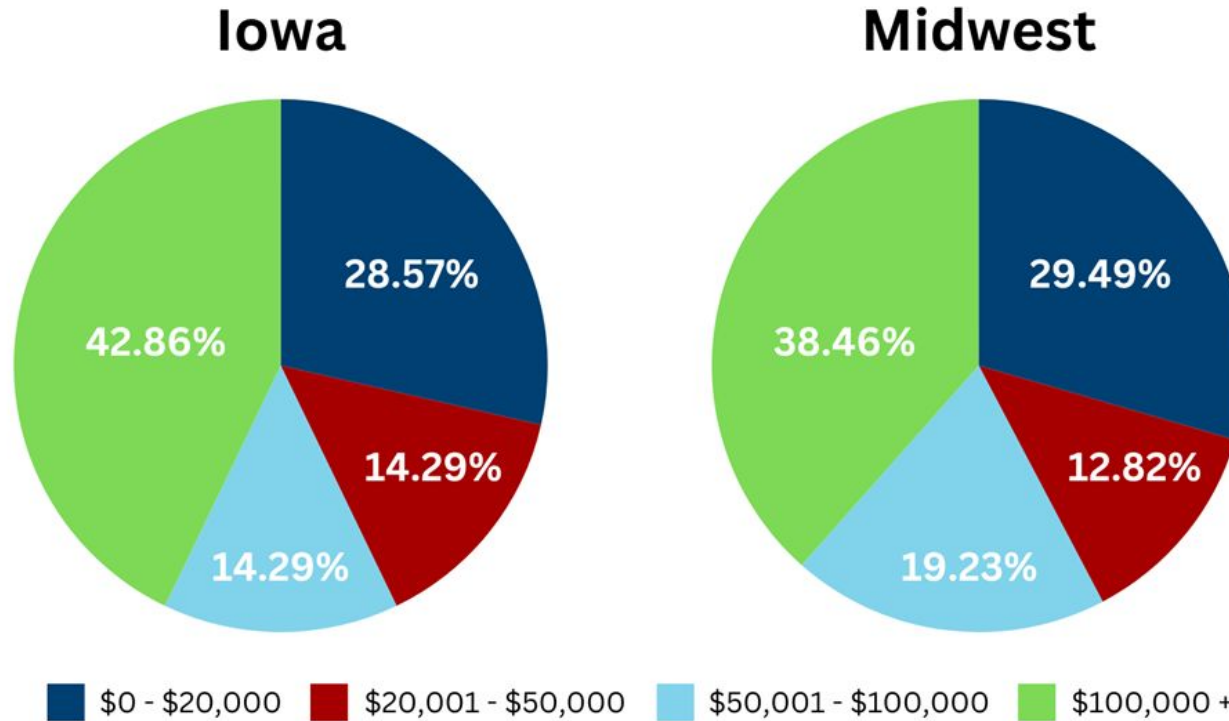


Iowa Organizational Structure Distribution



National Organizational Structure Distribution

iTIP Sports Tourism Index™



FACILITY BENCHMARKS

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

FLAT FIELD ANALYSIS

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

	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

FLAT FIELD ANALYSIS

- 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.**

DIAMOND ANALYSIS

Diamonds = 994 scored by the Sport Tourism Index™

	AVERAGES		Difference
	Top 10	Overall	
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

	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

DIAMOND ANALYSIS

- 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.**

INDOOR COURT ANALYSIS

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

	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

INDOOR COURT ANALYSIS

- 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.**

PICKLEBALL ANALYSIS

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

	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

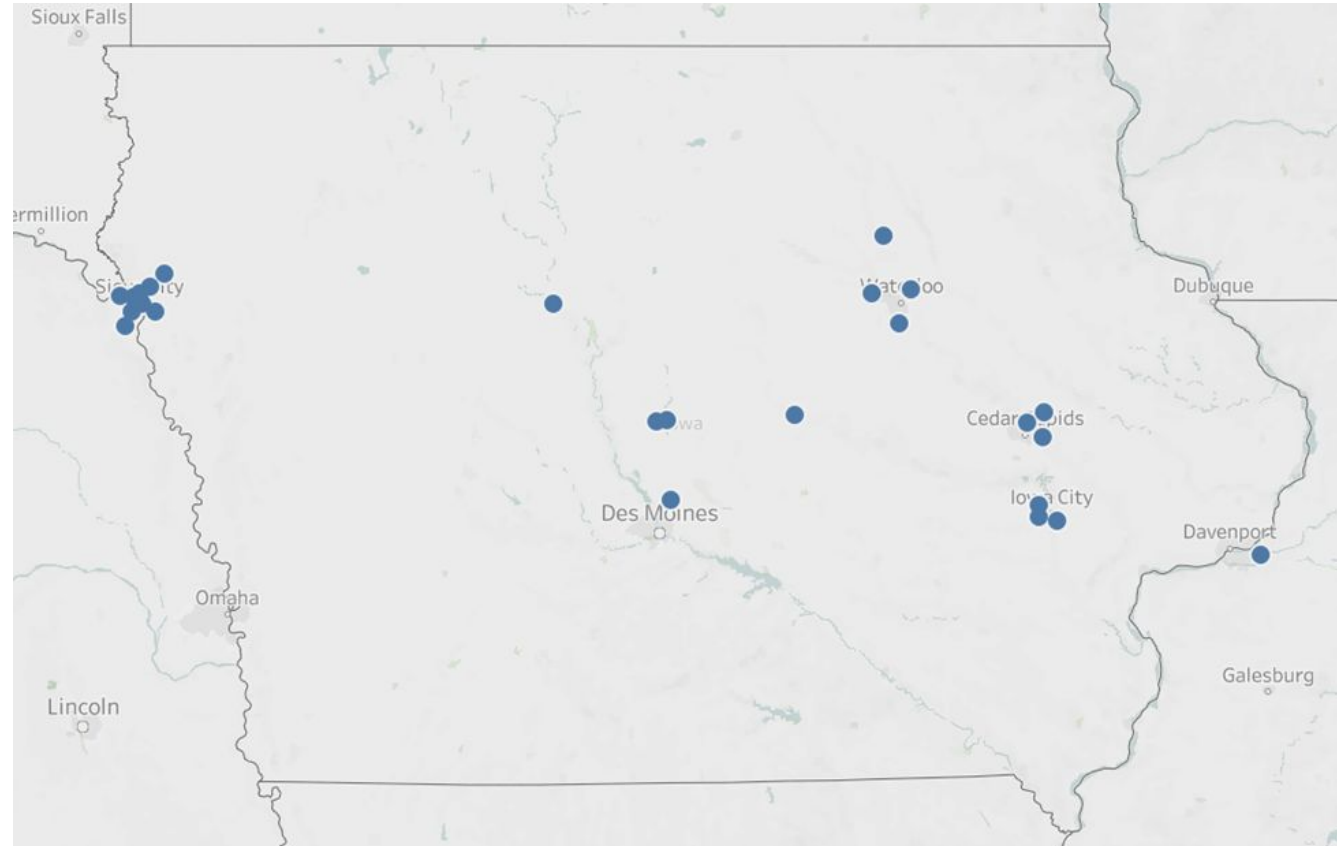
PICKLEBALL ANALYSIS

- 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.**

GOLF COURSE ANALYSIS

Golf Courses = 493 scored by the Sport Tourism Index™

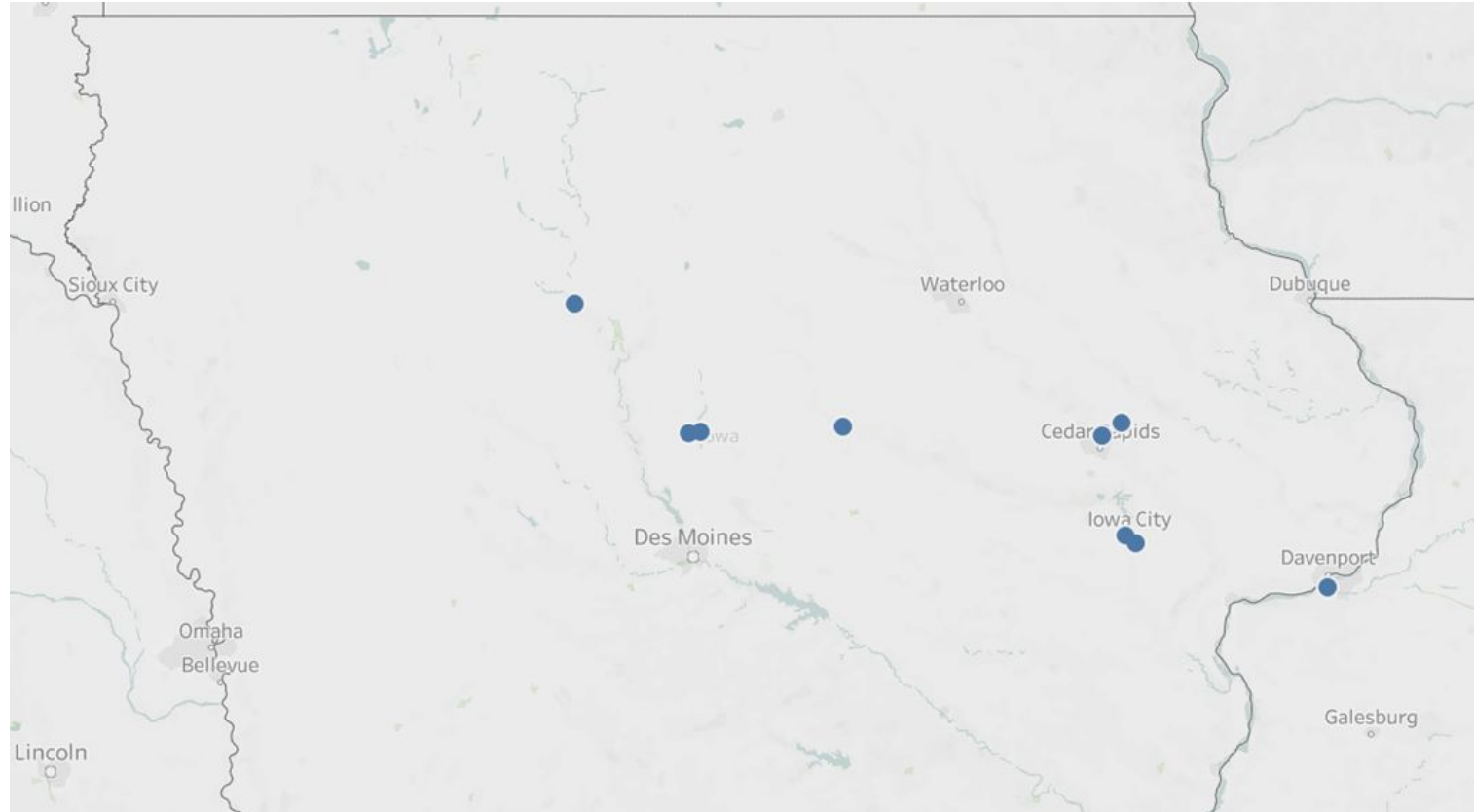
	AVERAGES		
	Top 10	Overall	Difference
Holes	57.6	19.4	38.2
Course Length	7,081.3	7,881.7	(800.4)
Auxiliary meeting rooms	10.3	2.1	8.2
Clubhouse	100%	85%	15%
Driving Range	100%	85%	15%
Putting Green	100%	94%	6%
Short Game	100%	83%	17%
Permanent restrooms	100%	100%	0%
Permanent Wi-Fi	100%	85%	15%
Parking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



SWIMMING POOL ANALYSIS

Swimming Pools = 210 scored by the Sport Tourism Index™

	AVERAGES		Difference
	Top 10	Overall	
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



ECONOMIC IMPACT ANALYSIS

- 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.**

ECONOMIC IMPACT ANALYSIS

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.



ECONOMIC IMPACT ANALYSIS

- 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

TRADE SHOWS

- **Most Frequented Trade Shows:**
 - SportsETA Symposium: Attended by 6 organizations with 11 individuals.
 - TEAMS Conference: Attended by 6 organizations with 6 individuals.
- **Non-Attendance Strategy:**
 - 4 organizations chose to sponsor/co-host events with iTIP instead of attending trade shows.
- **Event Attribution:**
 - SportsETA Conference: Attributed to 9 event wins, highlighting its significance in securing business opportunities.

RURAL COMMUNITIES

- The Consultant team analyzed sports participation within a 60-minute, 120-minute, and 300-minute driving radius for the following rural communities:
 - **Amana Colonies:** High participation in archery, boating, canoeing, and freshwater fishing, with MPI scores above the national average.
 - **Buchanan County:** Strong interest in power boating and freshwater fishing, with high MPI scores for hunting with rifles and shotguns.
 - **Charles City:** Notable participation in freshwater fishing and boating, with MPI scores indicating high engagement in hunting activities.
 - **Fairfield CVB:** Exceptional interest in freshwater fishing and target shooting, with significant engagement in hunting with rifles and shotguns.
 - **Keokuk:** High participation in freshwater fishing and boating, with strong MPI scores in hunting and target shooting.

RECOMMENDATIONS

Primary – Organizational (Near Term)

1. Regional Competition (uniqueness of destinations)
2. Broaden the Definition of Sports (non-traditional sport)
3. Sports Tourism Driving Facilities are Key (build w/ a purpose)

Secondary Recommendations – Facility “Tool Kit” (Longer Term)

1. Multipurpose Indoor Facility
2. Pickleball Dedicated Facility
3. Enhance Flat Fields & Diamonds

CONCLUSION

- Develop a Sports Culture
 - Enhance staff and volunteer capabilities.
 - Build strong local and regional partnerships.
 - Secure funding and develop sports venues.
- Expand Sports Definition
 - Promote hiking, kayaking, and cycling.
 - Leverage natural assets for outdoor leisure.
- Invest in Facilities
 - Develop versatile indoor venues.
 - Create dedicated Pickleball facilities.
 - Enhance flat fields with synthetic turf.

THANK YOU FOR YOUR TIME!

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