ST. CHARLES FIELDHOUSE

FEASIBILITY STUDY | SEPTEMBER 12, 2024

SWT DESIGN · BLUNDALL ASSOCIATES, INC. · JOHNSON CONSULTING · BALLARD*KING & ASSOCIATES LTD · BARKER RINKER SEACAT ARCHITECTURE

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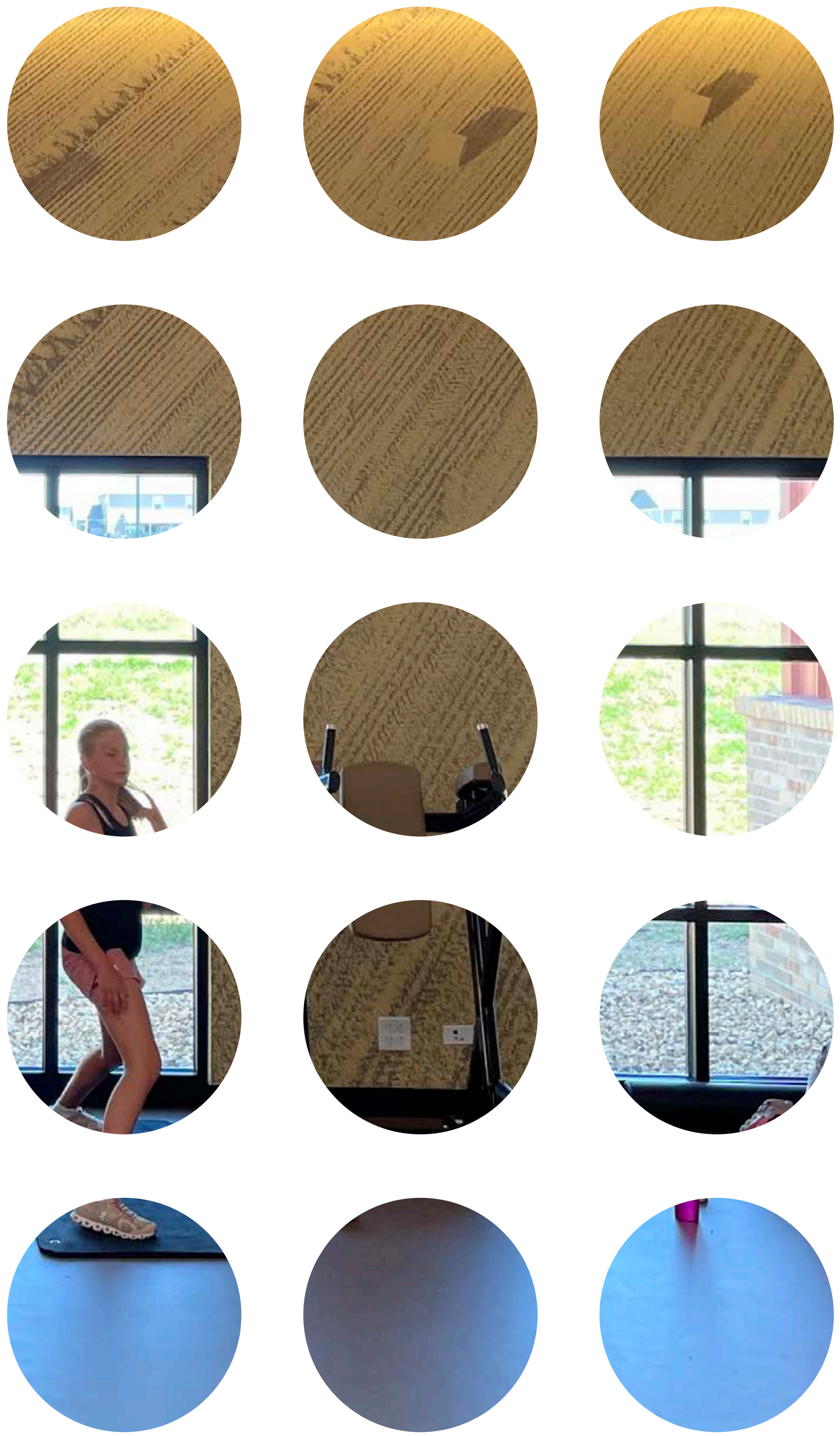


EXECUTIVE SUMMARY

PROJECT VISION STATEMENT

The Project Team developed the following vision statements based on input gathered from the Executive Team and further refinement of the overall park Master Plan's vision. The statements reflect the community's aspirations to provide the City of St. Charles with a unique and valuable regional park, fieldhouse, and associated community amenities.

FIELDHOUSE AND HUB VISION STATEMENT

To provide a sports tourism destination with unique, multi-generational amenities for residents and visitors of St. Charles.

97-ACRE PARK MASTER PLAN VISION STATEMENT

To provide unique amenities surrounded by passive elements and spaces to retreat into nature while providing the foundation for sports tourism and acting as a catalyst for the growing community of St. Charles, its citizens, and its visitors.

EXECUTIVE SUMMARY

PROJECT OVERVIEW

Founded in 1769, the City of St. Charles is a restored historic city located in Eastern Missouri along the Missouri River. St. Charles was the first state capital of Missouri and remains an integral and growing part of the region today. Home to over 70,000 residents, the City of St. Charles is the 9th most populous municipality in the state of Missouri.

The City of St. Charles has identified 2,600 acres of land north of Highway B as the City's greatest opportunity for large-scale growth and economic development. As such, in 2020 the City of St. Charles acquired 97.3 acres of land north of the city at the intersection of Highway 94 and Highway B, adjacent to 96.9 acres of land owned by the Orchard Farm School District (OFSD). Over the following year, the City of St. Charles and the OFSD collaborated to develop a Master Plan with shared use opportunities and the division of this approximately 200-acre parcel of land. The result of this collaboration is a Master Plan that incorporates many unique features that seek to best utilize shared amenities and to leverage the most for the City of St. Charles and the OFSD, ensuring the overall park becomes a destination within the community for residents and visitors alike.

Subsequently, the OFSD has developed a new high school on the northern ~97-acre parcel of land opening in 2024 and is currently constructing an elementary school on the same parcel. The future of the ~97-acre park property owned by the City of St. Charles is to be developed into the city's newest park with many unique and exciting amenities that will attract a broad spectrum of local residents and non-local visitors to the park throughout the year.

In 2023, the City of St. Charles contracted Barker Rinker Seacat Architecture (BRS) to complete a feasibility study for a Fieldhouse and HUB portion of the overall park Master Plan. This study area represents a portion of the park that is intended to be the most active and critical anchor and vital to the economic impact of the overall park Master Plan. An Executive Team representing the City of St. Charles Parks and Recreation Department was assembled to help guide decisions and keep the feasibility study in alignment with the outcomes of the overall park Master Plan. The stated mission of the Parks & Recreation Department is per the below:

> "The City of St. Charles Parks and Recreation Department provides parks, facilities and programs to enrich the quality of life for residents and visitors, while preserving green space for future generations to enjoy."

The resulting study sought valuable input through public meetings and an online public survey which the team was able to extract to further understand the true needs and wants of the community. The study also leveraged Focus and Stakeholder groups representing various members and groups within the community to provide input on uses and amenities that will make the HUB and Fieldhouse appealing to a broad range of users and contribute to overall success of the park. The resulting inputs incorporated many of the unique aspects of the original master plan, further tailoring it to be more specific to the needs of the community. The outcome is a solution that considers the overall quality of the park, its mission and vision, and the desire for a facility that contributes to the overall economic prosperity of the community.

The study commenced in April 2023, and over 15 months, gathered and disseminated as much data as possible on: the Fieldhouse and HUB programming and amenities, Fieldhouse facility operations and business plan, projections on the Economic Impact of the HUB and Fieldhouse, and an Opinion of Probable Cost for this scope of the park Master Plan. The study concluded with the issuing of this report.

SCHEDULE OF ACTIVITIES & TASKS

FEASIBILITY STUDY GOALS

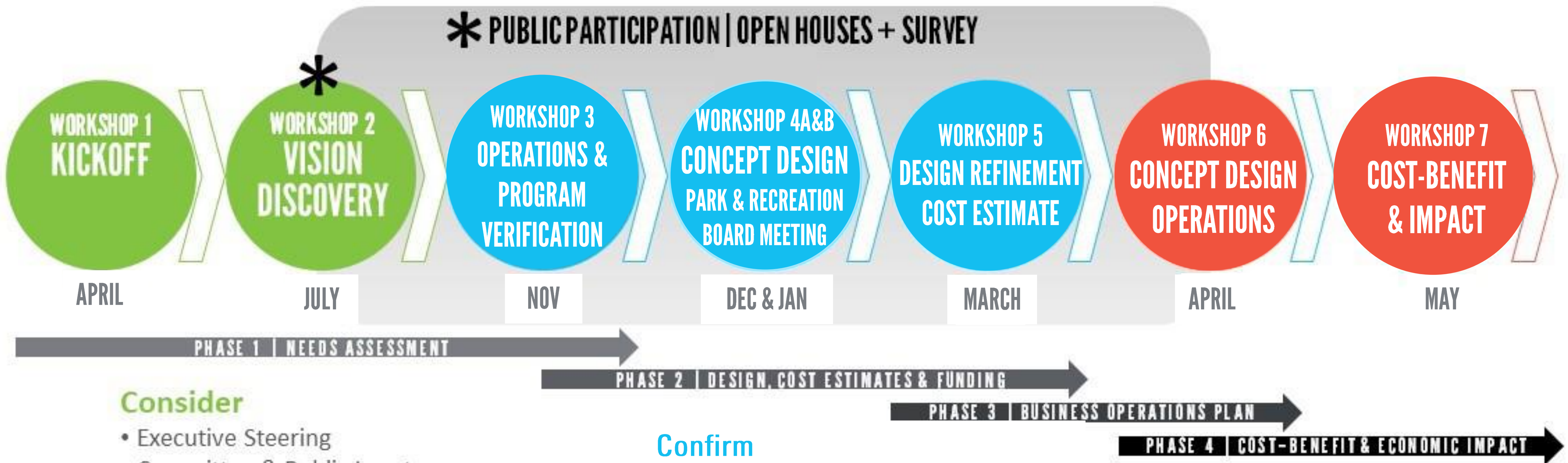
The Project Team Considered, Confirmed, and Committed to the following project goals:

- Listen to the St. Charles Community.
- Resemble the community values.
- Focus on The City of St. Charles' needs.
- Provide new offerings, programs, and amenities to fill gaps.

Create a multi-cultural and multi-generational Fieldhouse and HUB for all, that is safe, inclusive, and reflects the St. Charles community and what it aspires to be.

Provide Economic Impact and social benefit through sports tourism to the city.

STUDY TIMELINE



Consider

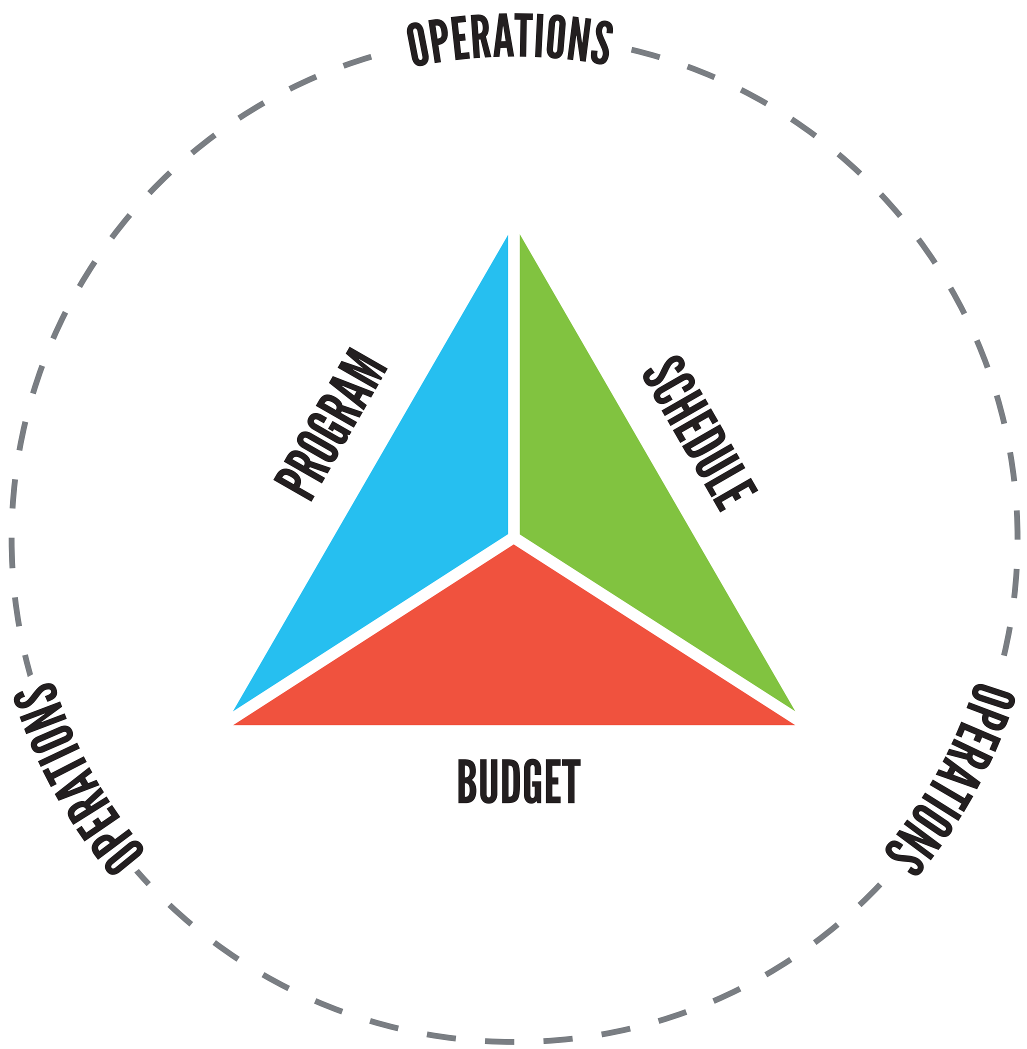
- Executive Steering Committee & Public Input
- Aims
  - Operations
  - Market Focus
  - Level of Service
  - Brand/Identity
  - Differentiators
- Wish List
  - Program
  - Budget
  - Schedule

Confirm

- Program
- Budget & Costing
- Operational Modeling
  - Cost Recovery
- Funding Options
- Schedule
- Preliminary Design & Concept Design
  - Building and Site
  - Building Plans
- Character & Massing

Commit

- Program Refinement
- Concept Design
- Cost Benefit
- Economic Impact
- Site and Building Design Concept
- Budget / Cost Model
- Schedule
- Operations Plan
- Funding Partners



PROCESS

A proven process for the feasibility study was employed and adhered to throughout the project. The diagram to the left illustrates three areas central to the feasibility study: program, budget, and schedule. Please note the triangle is balanced or equilateral. If one side overpowers the other two sides, the project will not be balanced, and expectations will not be met. Essential to maintaining a positive outcome for the study was keeping the triangle in equilibrium.

The red, blue and green triangles indicate the three elements of the feasibility study, which were visited and revisited many times to check the project balance.

The process used throughout this study is founded on a concept of gathering input, refining and reporting back the information for verification and coming to an agreed-upon outcome that has been thoroughly vetted to build confidence that appropriate decisions have been made. In the process, the study team and the public were asked to:

CONSIDER THE OPTIONS

CONFIRM THE ASSUMPTIONS

COMMIT TO DECISIONS.

Beginning with the end in mind, the goals and vision for the project that were defined are unique to this community. The outcome is a definition of the vision for the project with a goal of capturing a picture of the intended experiences and expectations for what will be the St. Charles Fieldhouse and HUB set within the larger 97-acre park.

CONSIDER.
CONFIRM.
COMMIT.®

PUBLIC ENGAGEMENT

PUBLIC ENGAGEMENT

Central to the feasibility study process was gathering input and reporting results. This was facilitated through one public meeting, an online survey, as well as Focus and Stakeholder group meetings. At every opportunity, the team sought feedback on the community's wants and needs to understand their vision. The result is a program make-up that directly represents the consensus for what the future Fieldhouse and HUB should be for the City of St. Charles.

INPUT & FINDINGS

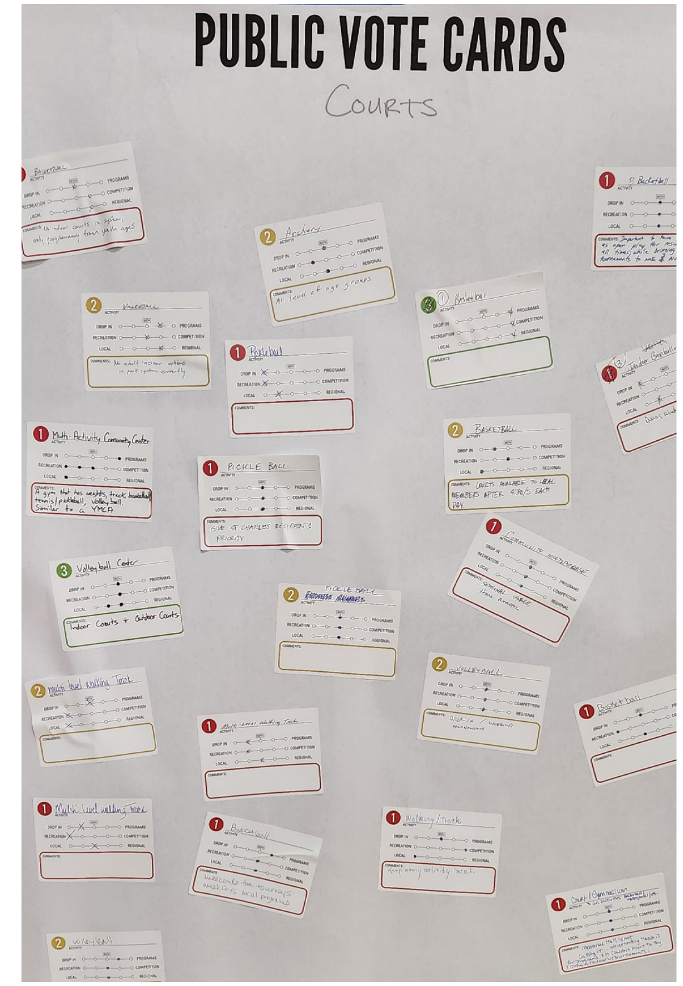
ACE AND DOT-O-CRACY

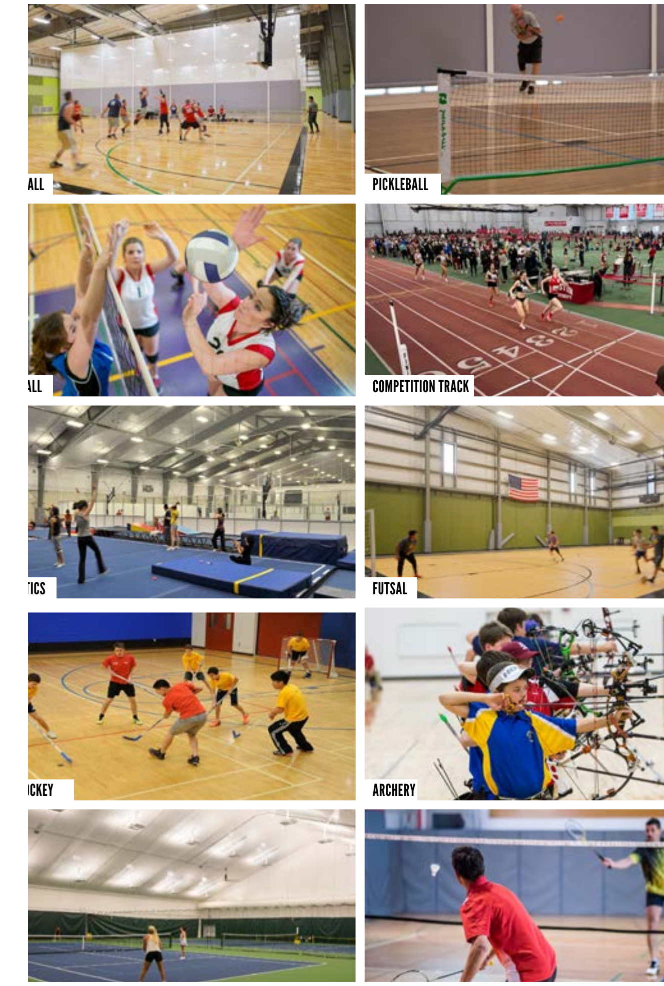
These interactive voting activities are a fun way for the public to participate in prioritizing what spaces, programs and activities are most important to them. For this, BRS printed posters that included imagery of a diverse range of spaces and activities that could be included in the fieldhouse. This activity was broken into two games that were played at the public meeting: the ACE Game and Dot-o-cracy.

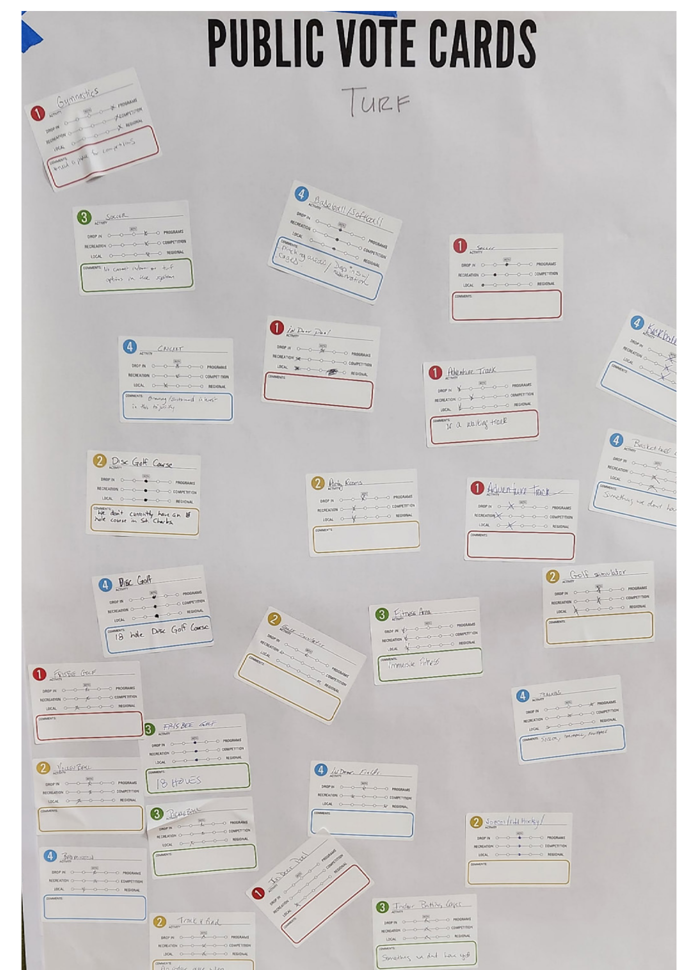
For the ACE Game, members of the public were given 4 votes and asked to fill out a card indicating their preferred Activity (A) within either a Hardcourt Fieldhouse or a Turf Fieldhouse, such as Basketball, Futsal, Soccer, or Track and Field. Participants were asked to further define what their preferred Capacity (C) and Experience (E) for this activity would be from a list indicating: Drop-in to Program usage, Recreation to Competition, and Local to Regional. The results of this game provide a clearer picture of the type, size, and experience of spaces required to satisfy the needs and wants of the game participants.

To supplement this exercise, members of the public were then asked to play Dot-o-cracy in which they were given five sticky dots, which represented their votes, and were asked to place dots on the Experience Enhancers for the new facility. Experience Enhancers are activities that can take place in the types of larger space that would be needed to accommodate activities noted in the ACE game, such as Archery Tag or Line Dancing, or spaces that are separate from these spaces that may traditionally accompany these larger main program spaces, such as a Walk/Jog track, Events Hall, or Lounges and Concessions. It was left up to the participant as to whether their votes were all placed on different Experience Enhancers or if some Experience Enhancers received more than one of their votes.

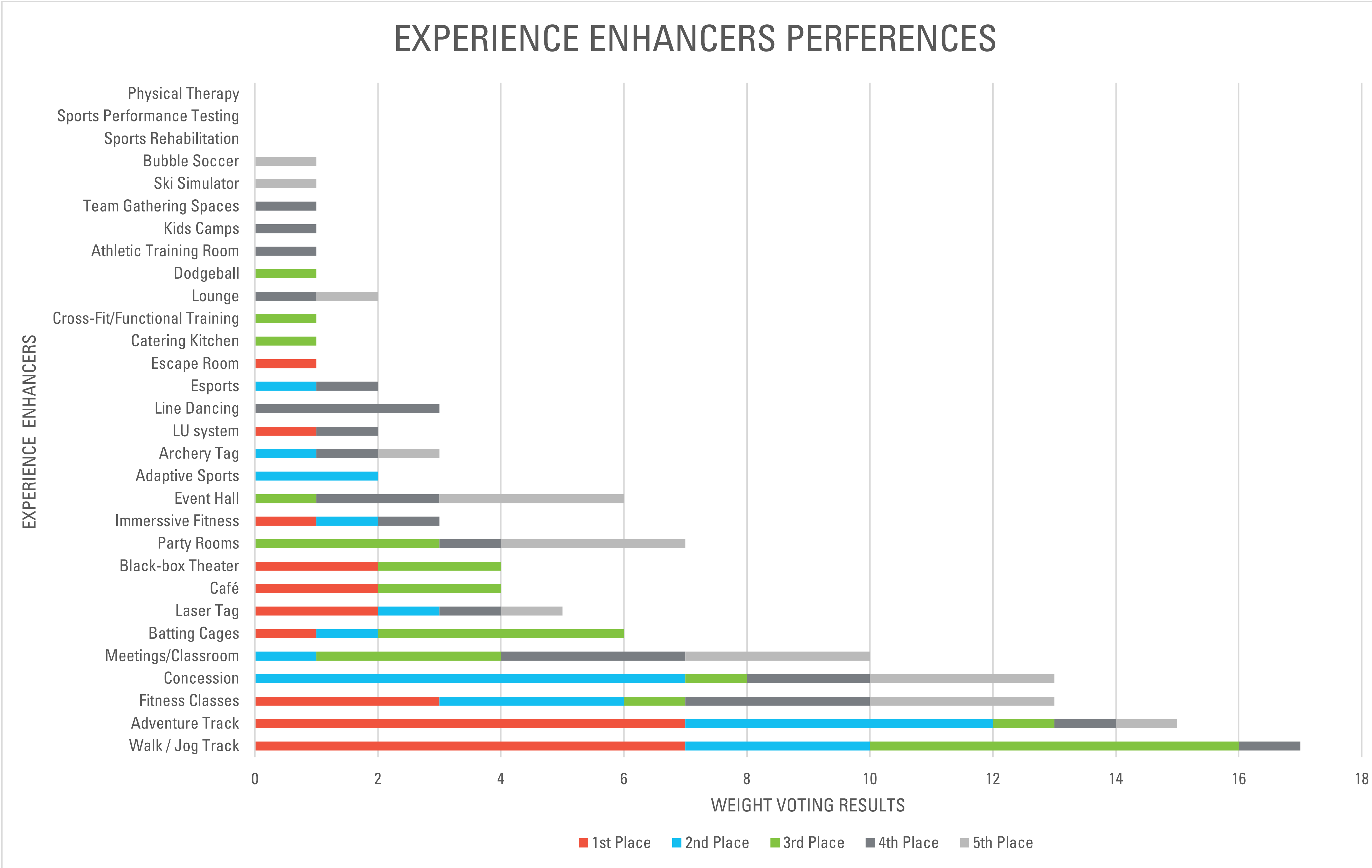
This activity helps to poll the public and prioritize what programs should be included. Both games were played at the public meeting and included roughly 30-35 participants ranging from young families to seniors with over 150 dots collected and analyzed.

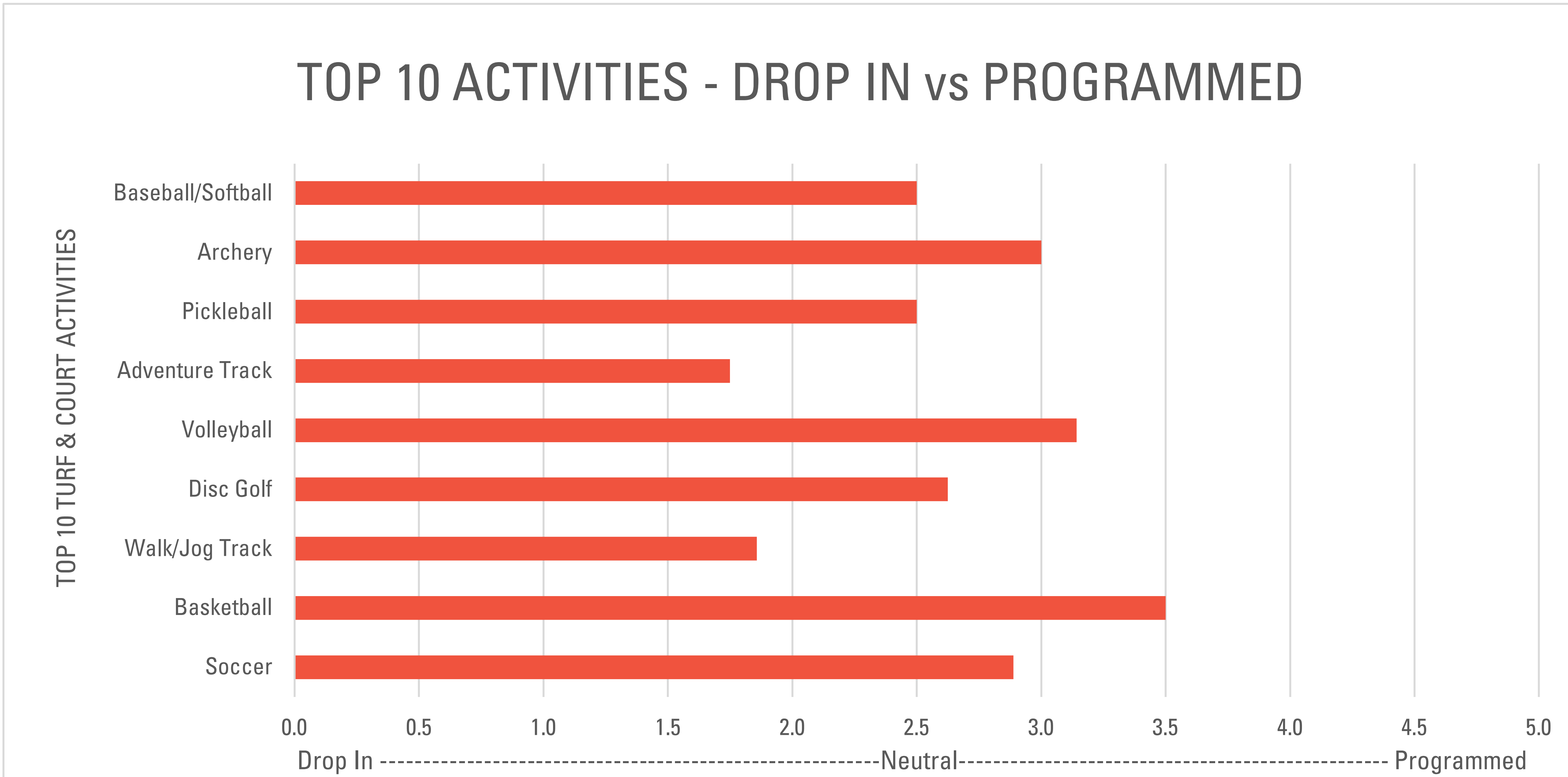


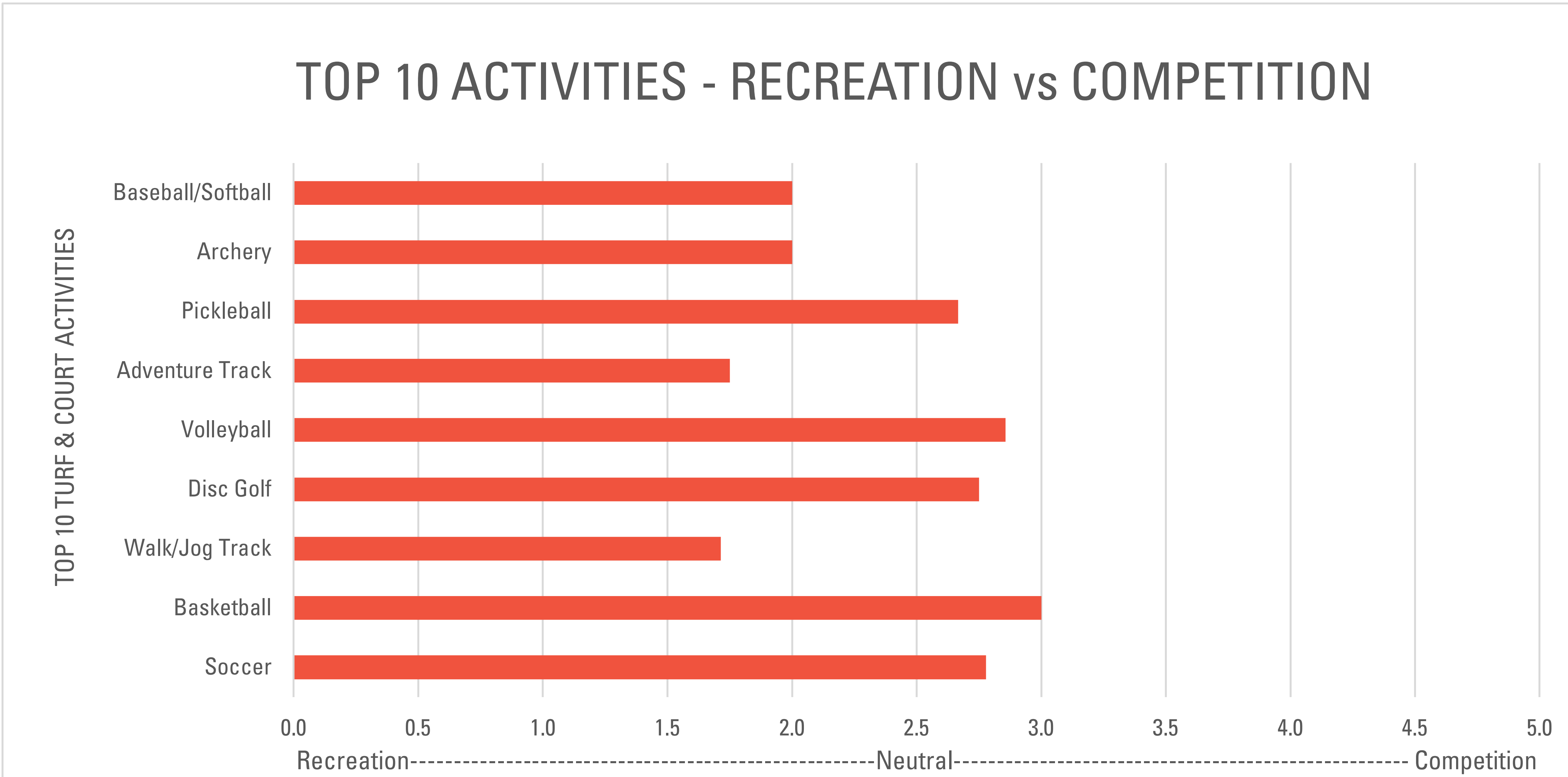




PUBLIC MEETING #1 RESULTS




TOP 10 ACTIVITIES - DROP IN vs PROGRAMMED
TOP 10 TURF & COURT ACTIVITIES
Baseball/Softball
Archery
Pickleball
Adventure Track
Volleyball
Disc Golf
Walk/Jog Track
Basketball
Soccer
0.0
0.5
1.0
1.5
2.0
2.5
3.0
3.5
4.0
4.5
5.0
Drop In --Neutral-- Programmed


TOP 10 ACTIVITIES - RECREATION vs COMPETITION
TOP 10 TURF & COURT ACTIVITIES
Baseball/Softball
Archery
Pickleball
Adventure Track
Volleyball
Disc Golf
Walk/Jog Track
Basketball
Soccer
0.0
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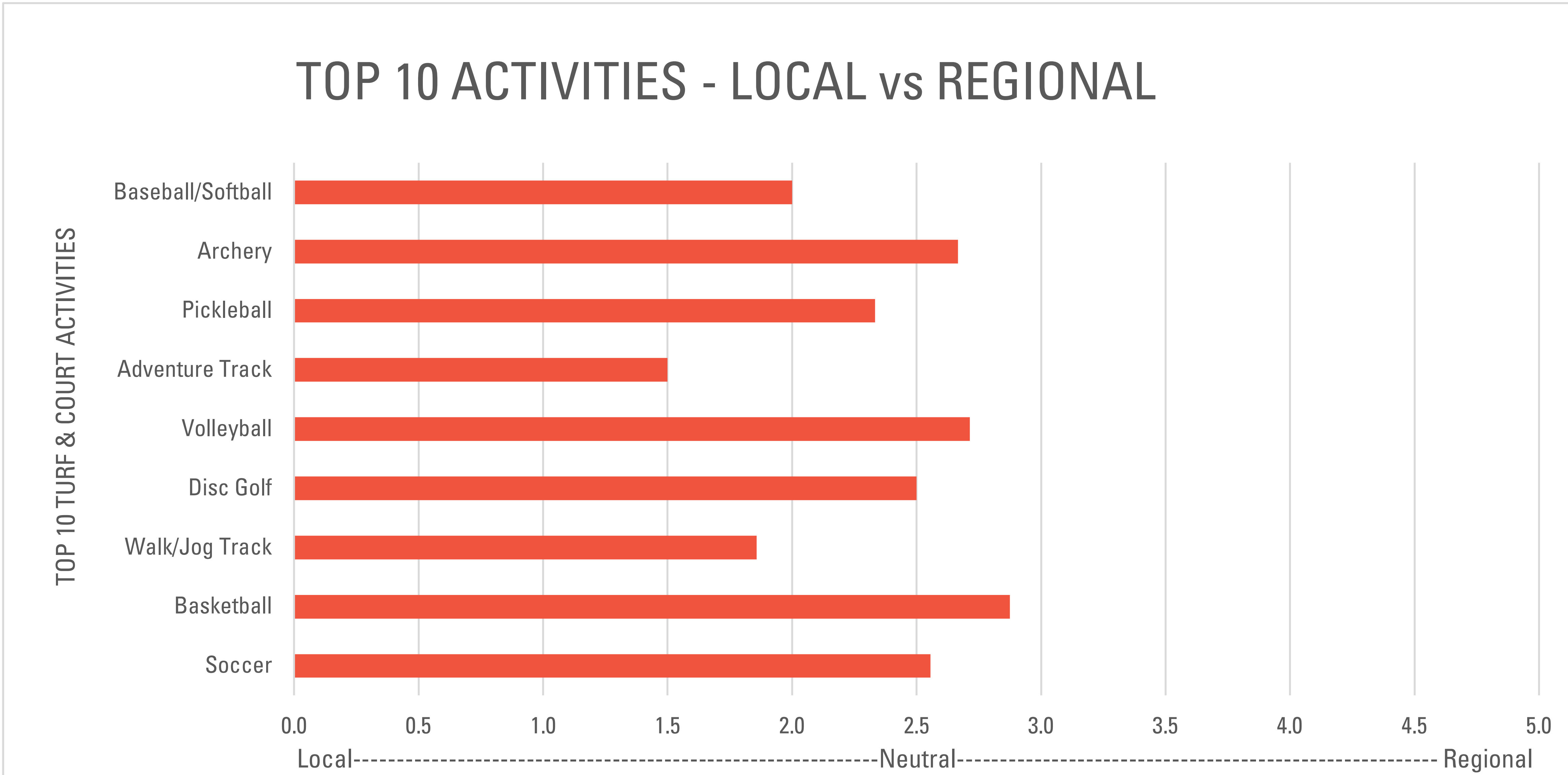
4.5
5.0
Recreation--Neutral-- Competition


TOP 10 ACTIVITIES - LOCAL vs REGIONAL
TOP 10 TURF & COURT ACTIVITIES
Baseball/Softball
Archery
Pickleball
Adventure Track
Volleyball
Disc Golf
Walk/Jog Track
Basketball
Soccer
0.0
0.5
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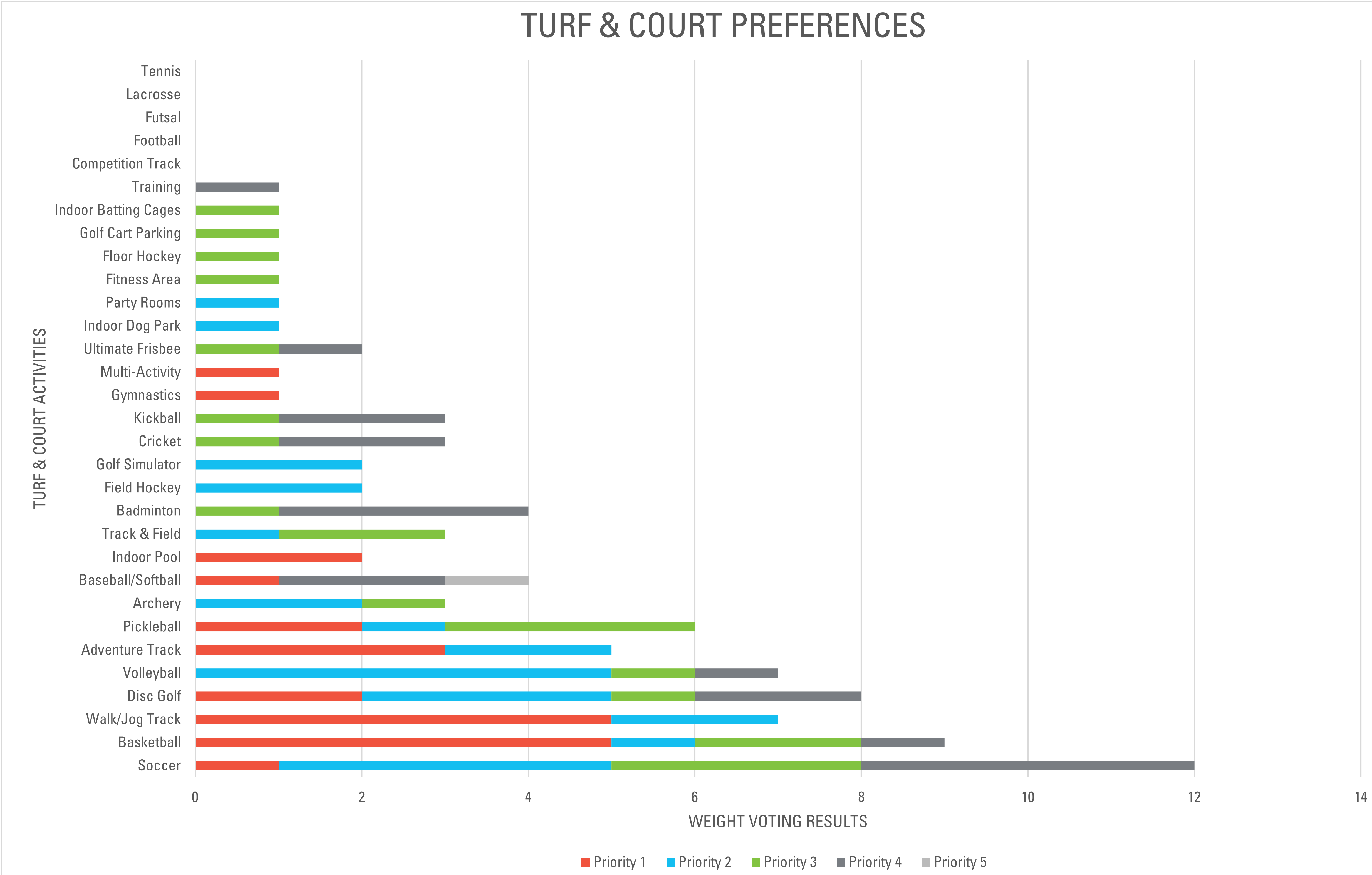
Local--Neutral--- Regional

PUBLIC MEETING #1 RESULTS



CARD GAME

Establishing a program early allows the Project Team and Executive Team to prioritize what can be accomplished and what potential funds are needed to achieve the desired goals.

One of our engagement tools is the Card Game. We have found that turning the programming effort into an activity is a great way to make otherwise abstract and complex information readily accessible, more inclusive, and fun. The outcome of the activity is a healthy discussion about needs vs. wants and a prioritized program that meets the budget and targets both total project costs, and long-term operating goals.

The cards have detailed information about the spaces, including:

- Square footages
- Potential uses of that space
- Probable construction costs of the space
- Potential for return on operations
- A picture of what the space might look like

The BRS Team met with both the Stakeholders and the Focus Groups in July of 2023. The groups were led through the Card Game exercise to evaluate potential spaces that might be part of the Fieldhouse. Based on the results of the Card Game, BRS documented the selected space types and amenities as prioritized lists, indicating the anticipated size of each, to create a working program.

The Executive Team then refined the initial prioritized programs to reflect data gathered through other public input methods and input from St. Charles Parks and Recreation on the activities/uses of each space. Over the course of multiple iterations and scenarios, an eventual understanding of what a viable and sustainable program for the Fieldhouse might look like.

PROGRAM SPACE	GROSS AREA (SF)	STAKEHOLDER GROUP OPTION 1	STAKEHOLDER GROUP OPTION 2	STAKEHOLDER GROUP OPTION 3	FOCUS GROUP OPTION 1	FOCUS GROUP OPTION 2
Administration	2,443	✓	✓	✓	✓	✓
Lobby & Support	4,404 - 5,508	✓	✓	✓	✓	✓
Locker Space - 1	3,011 - 4,300	✓	✓	✓	✓	✓
Universal Change Rooms	948 - 1,422	✓	✓	✓	✓	✓
Café / Juice Bar	1,463	✓ ALT	✗	✗	✓	✗
Pro Shop / Retail Sales	550	✗	✗	✓	✗	✗
Partner / Hospital Wellness Center	3,226	✗	✓	✓	✗	✓ ALT
Child Watch	1,065	✗	✗	✗	✗	✓ ALT
Multi Purpose Room	1,685	✓	✓	✓	✗	✗
Indoor Playground	1,550	✗	✗	✗	✗	✓ ALT
Catering Kitchen	644	✓ ALT	✗	✗	✗	✗
Commercial Kitchen / Restaurant	5,018	✓ ALT	✗	✗	✗	✓
Hard Court Fieldhouse with 4 HS Basketball Courts	44,039	✓ ALT	✗	✗	✗	✗
Hard Court Fieldhouse with 6 HS Basketball Courts	62,696	✗	✓	✗	✓	✗
Hard Court Fieldhouse with 8 HS Basketball Courts	81,353	✗	✗	✓	✓ ALT	✗
Hard Court Fieldhouse with 10 HS Basketball Courts	100,010	✗	✗	✗	✗	✓
Hard Court Fieldhouse with 12 HS Basketball Courts	118,772	✗	✗	✗	✗	✓ ALT
Turf Space - Traning Only	10,500	✓	✗	✗	✗	✗
Turf Fieldhouse - 1x9v9 Soccer	57,191	✗	✓	✗	✗	✗
Turf Fieldhouse - 2x9v9 Soccer	109,498	✗	✗	✗	✓	✗
Turf Fieldhouse - 3x9v9 Soccer	159,642	✗	✗	✗	✗	✓
Turf Fieldhouse - HS Football Field	100,779	✗	✗	✗	✗	✗
Gymnastics Gym	8,610	✗	✗	✗	✗	✓ ALT
Indoor Competition Track 200m	71,091	✗	✗	✗	✗	✓ ALT
On Grade Walk/Jog Track	5,484	✓	✗	✗	✗	✗
Elevated Walk/Jog Track	5,484	✓ ALT	✓	✗	✗	✗
Adventure Hill Course Track	10,912	✗	✗	✓	✗	✓
Wellness / Therapy / Fitness Testing Rooms	468	✗	✗	✓	✗	✗
2000 SF Fitness and Weights	2,551	✗	✗	✗	✗	✓ ALT
15 - 20 Person Aerobics / Dance Studio	936	✓	✗	✗	✗	✓ ALT
30 - 35 Person Aerobics / Dance Studio	2,340	✗	✓	✓	✗	✓ ALT
Community Indoor Skate Park or Parkour Park	12,915	✗	✗	✓	✗	✗
Regional Indoor Skate Park or Parkour Park	23,310	✗	✗	✓ ALT	✗	✗
Golf Simulator(s)	200	✗	✗	✓	✗	✓ ALT

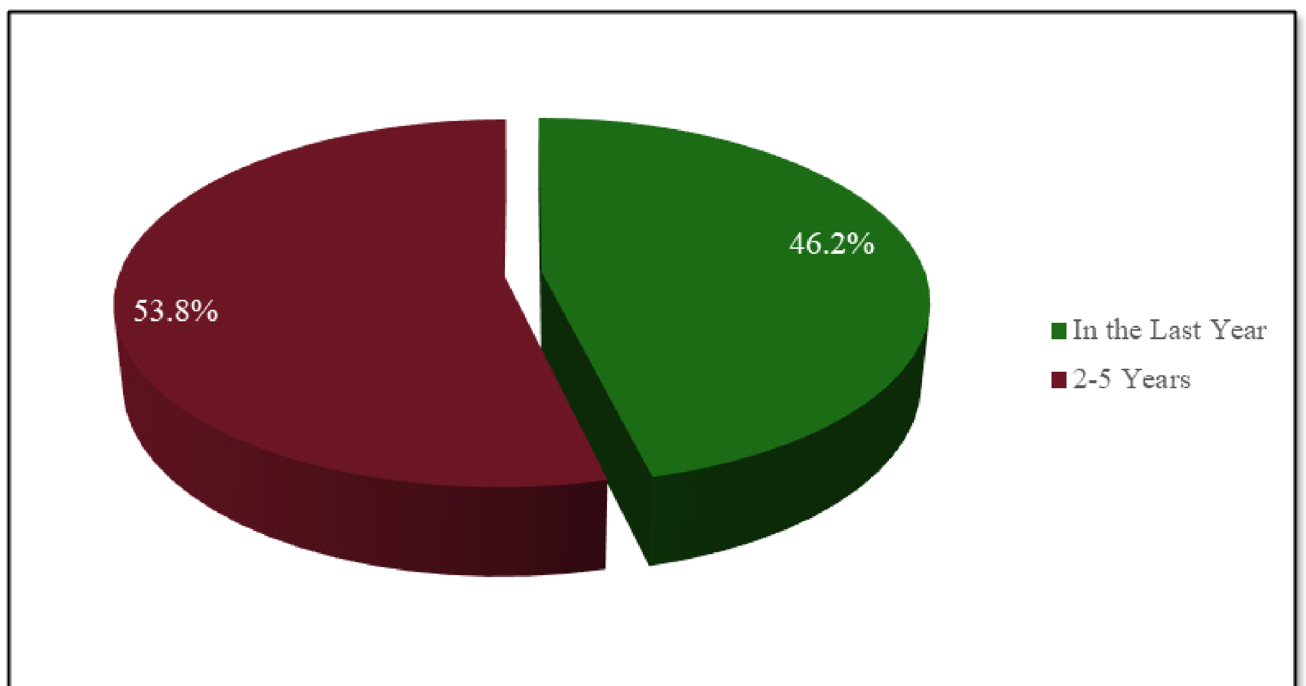
PUBLIC SURVEY

In addition to the ACE and Dot-o-cracy games, consultant Ballard*King also surveyed the public with a non-statistically valid online survey following the initial public meeting. The survey was designed to supplement the information gathered at the public meeting and offer an opportunity for input from those who could not attend the public meeting. The survey was widely advertised and received 1,030 participants.

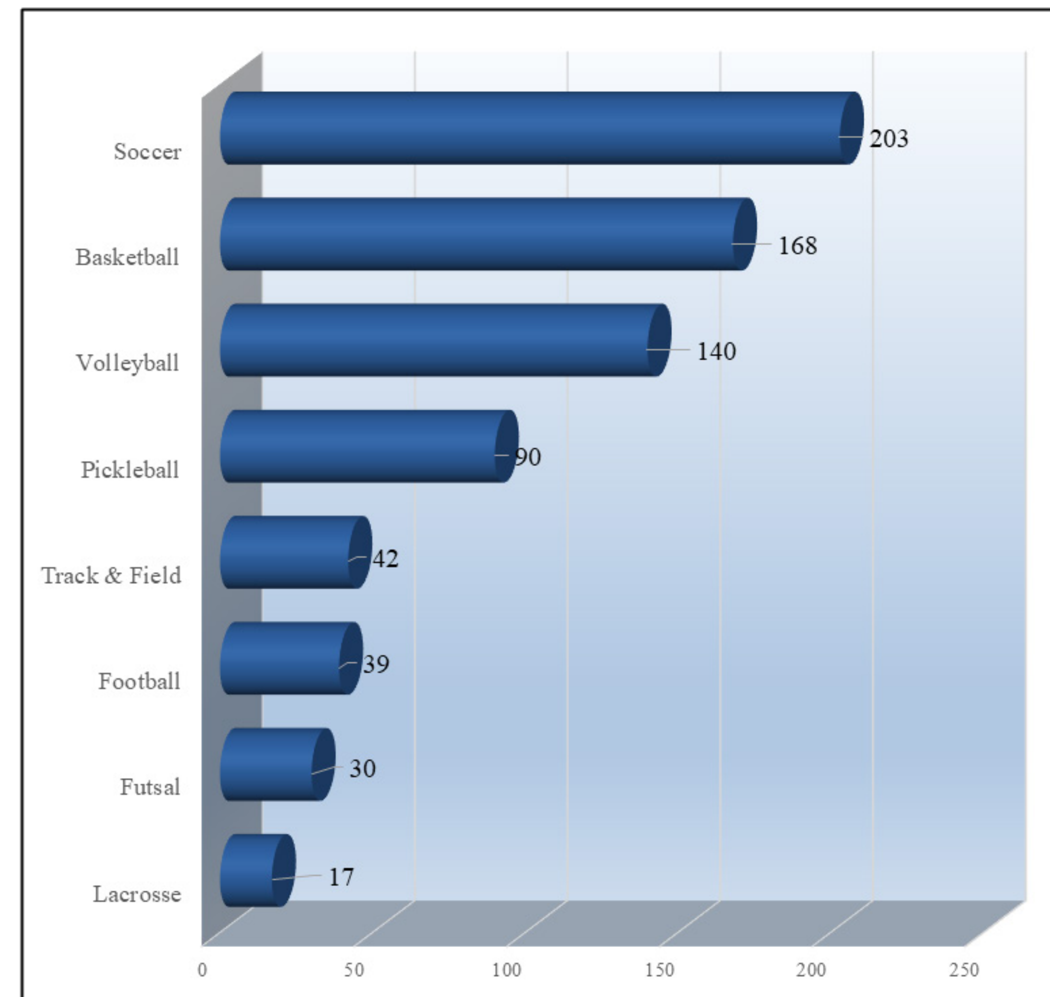
Like the ACE and Dot-o-cracy games, the survey asked the public to prioritize programmatic spaces/ activities they would like to see in the new facility, the type of programming (e.g., youth, adult), and rental space needs. It also provided an overall understanding of respondents' demographics.

The following represents a sample of the online survey questions meant to illustrate the overall sentiment of the survey respondents. The full survey data set can be found in appendix B.

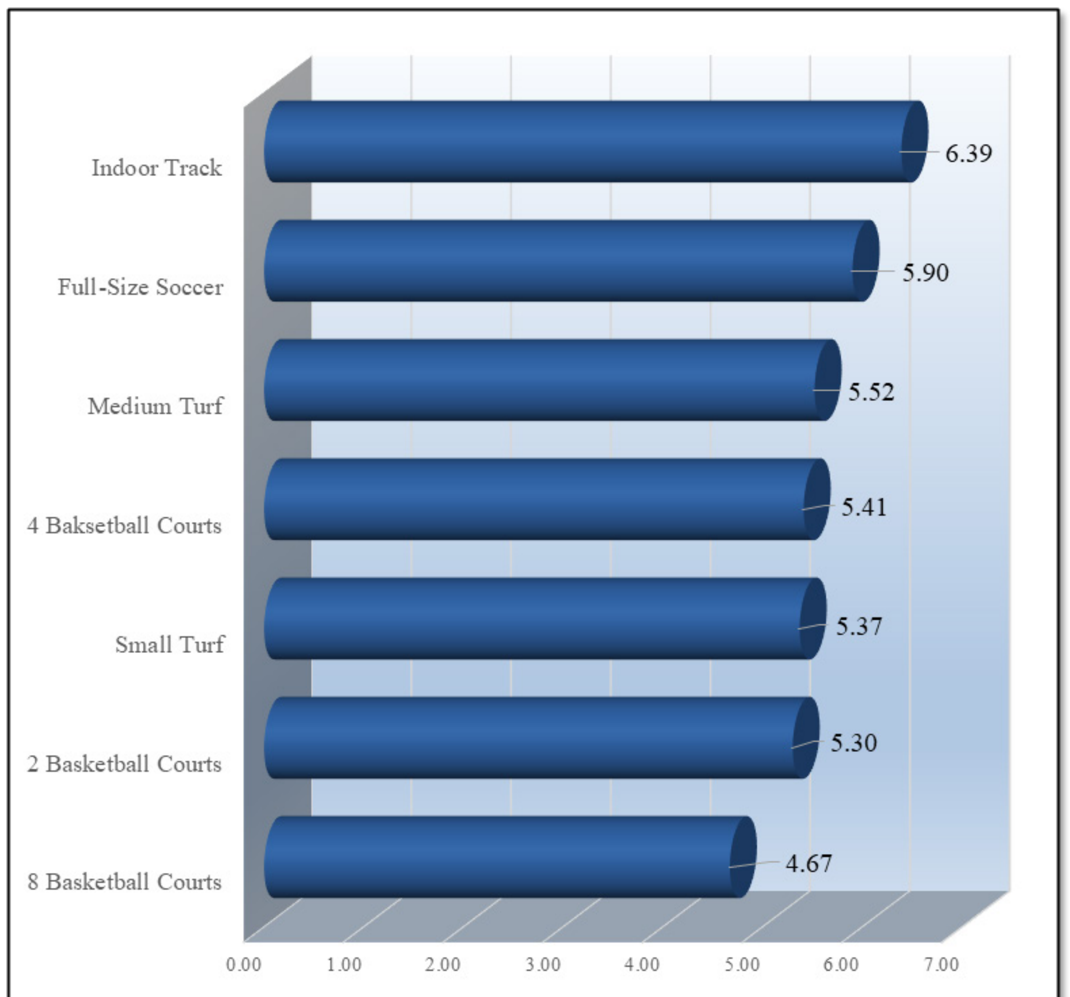
DO YOU OR MEMBERS OF YOUR HOUSEHOLD TRAVEL OUTSIDE OF ST. CHARLES COUNTY TO PARTICIPATE IN INDOOR PRACTICES OR COMPETITIONS?



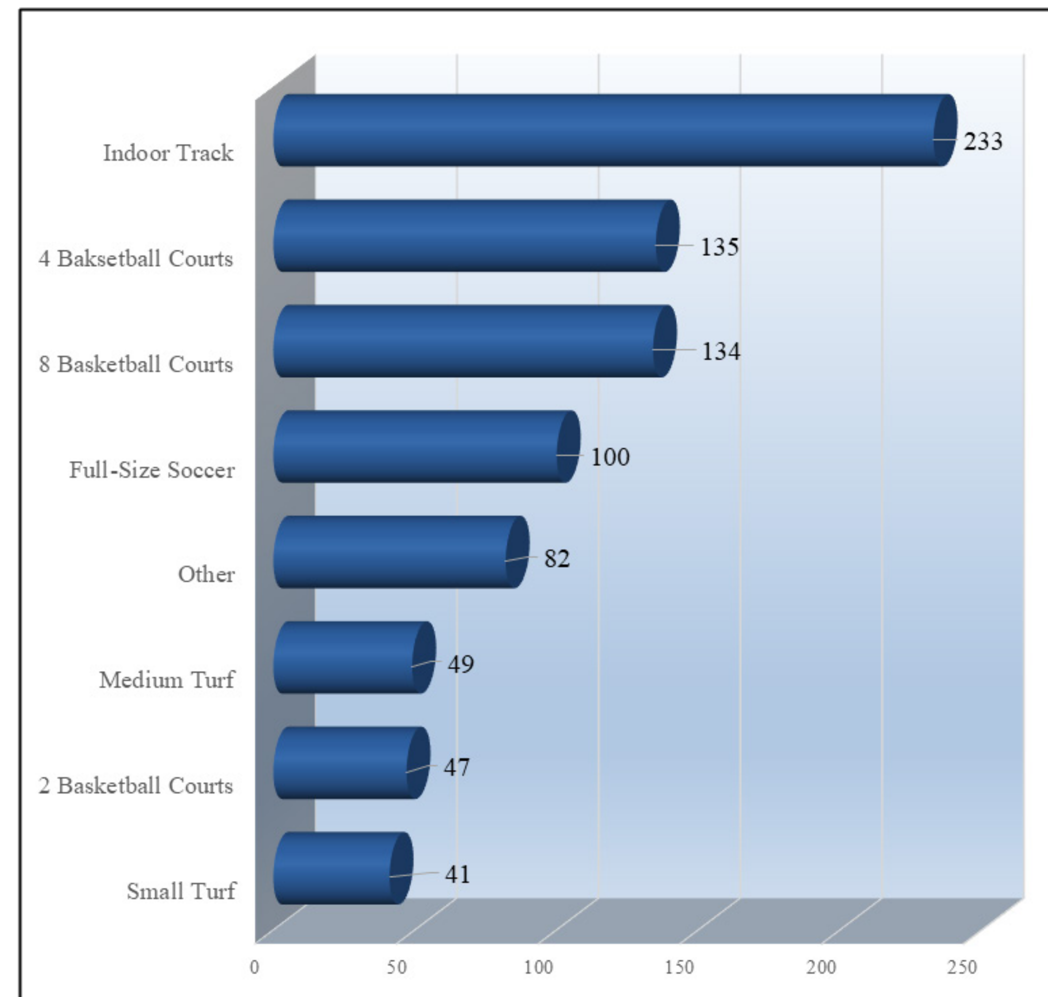
WHAT TYPES OF INDOOR PRACTICES OR COMPETITIONS DO YOU AND MEMBERS OF YOUR HOUSEHOLD TRAVEL OUTSIDE OF ST. CHARLES COUNTY FOR? (PLEASE CHECK ALL THAT APPLY)



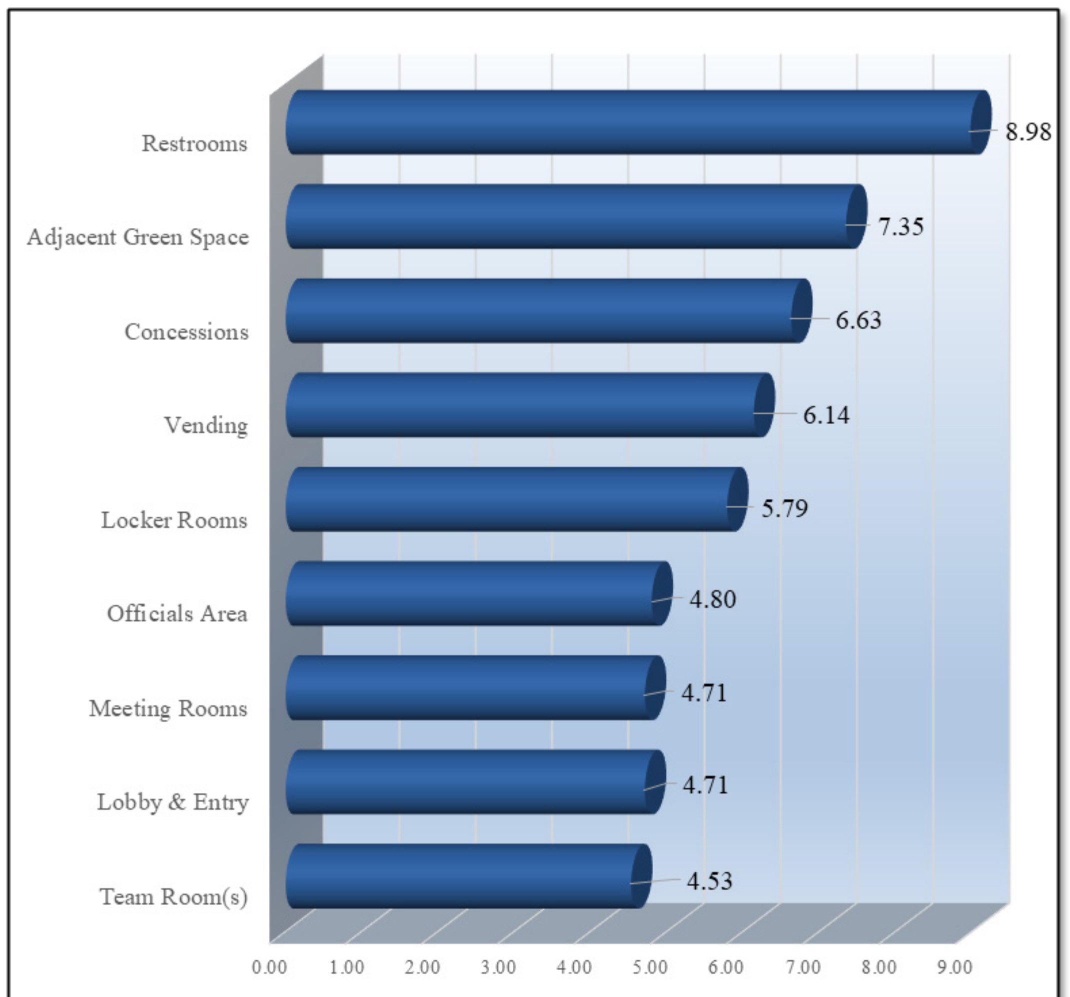
THE FOLLOWING ARE CONFIGURATION OPTIONS FOR AREAS THAT COULD BE INCLUDED IN AN INDOOR FACILITY. PLEASE IDENTIFY HOW IMPORTANT EACH OF THE AREAS ARE TO YOU OR MEMBERS OF YOUR HOUSEHOLD.



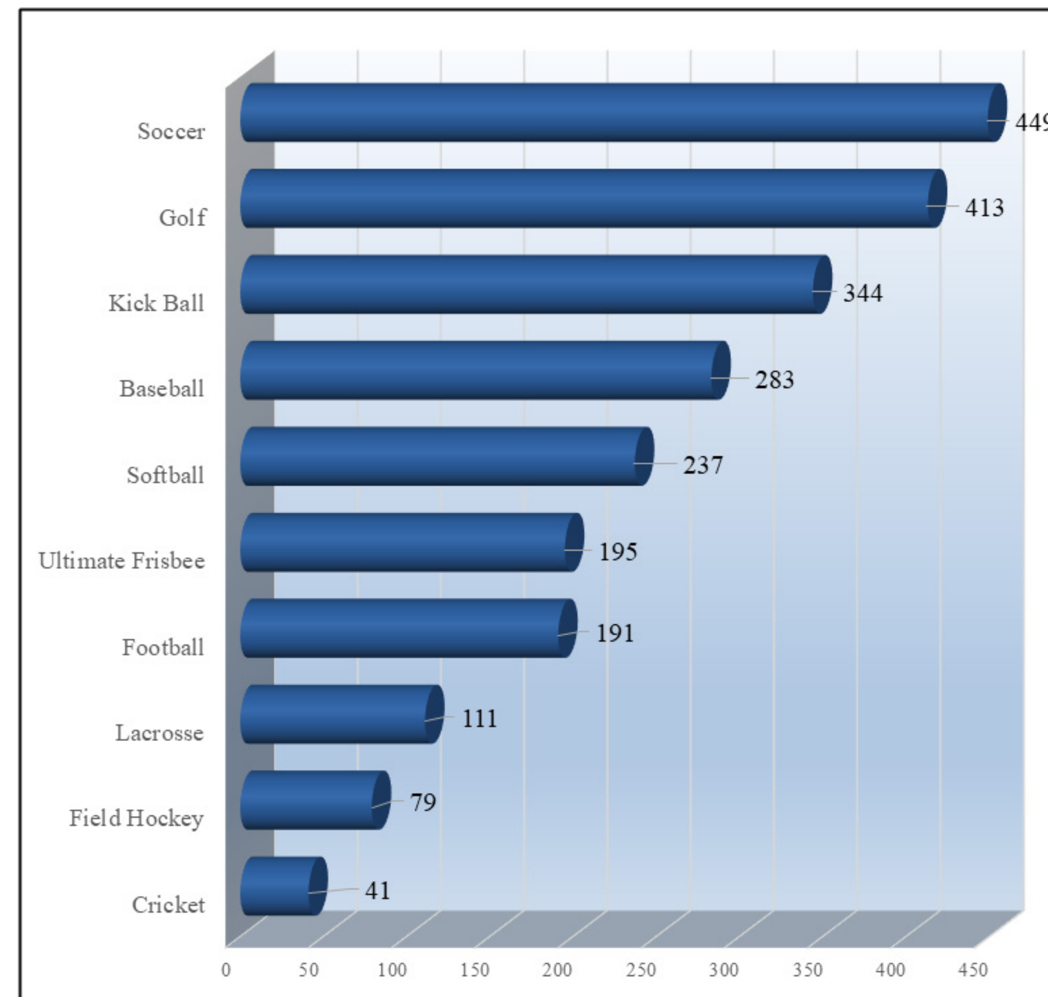
OF THE COMPONENTS LISTED IN THE PREVIOUS QUESTION WHICH IS THE MOST IMPORTANT TO YOU AND YOUR HOUSEHOLD?



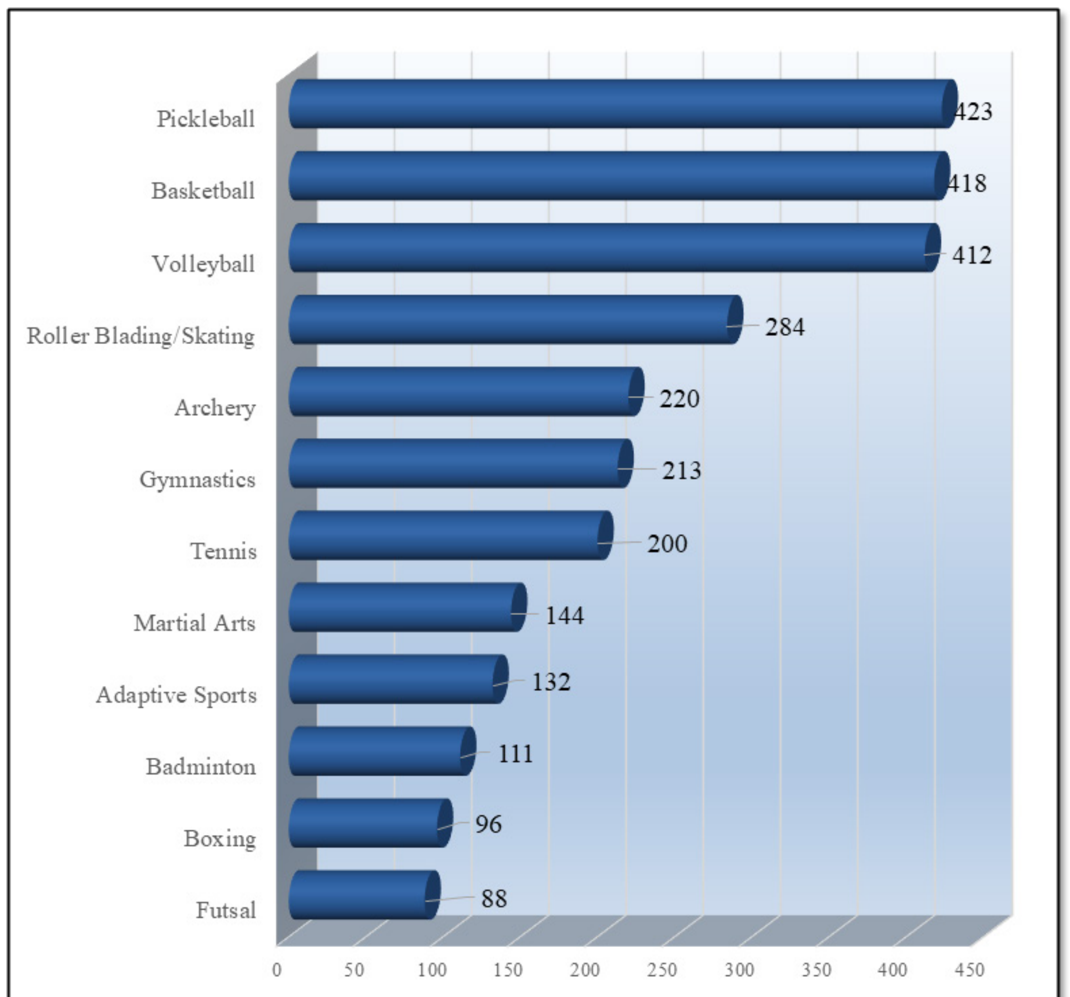
THE FOLLOWING ARE OTHER AREAS THAT COULD BE INCLUDED IN AN INDOOR FACILITY. PLEASE IDENTIFY HOW IMPORTANT EACH OF THE AREAS ARE TO YOU OR MEMBERS OF YOUR HOUSEHOLD.



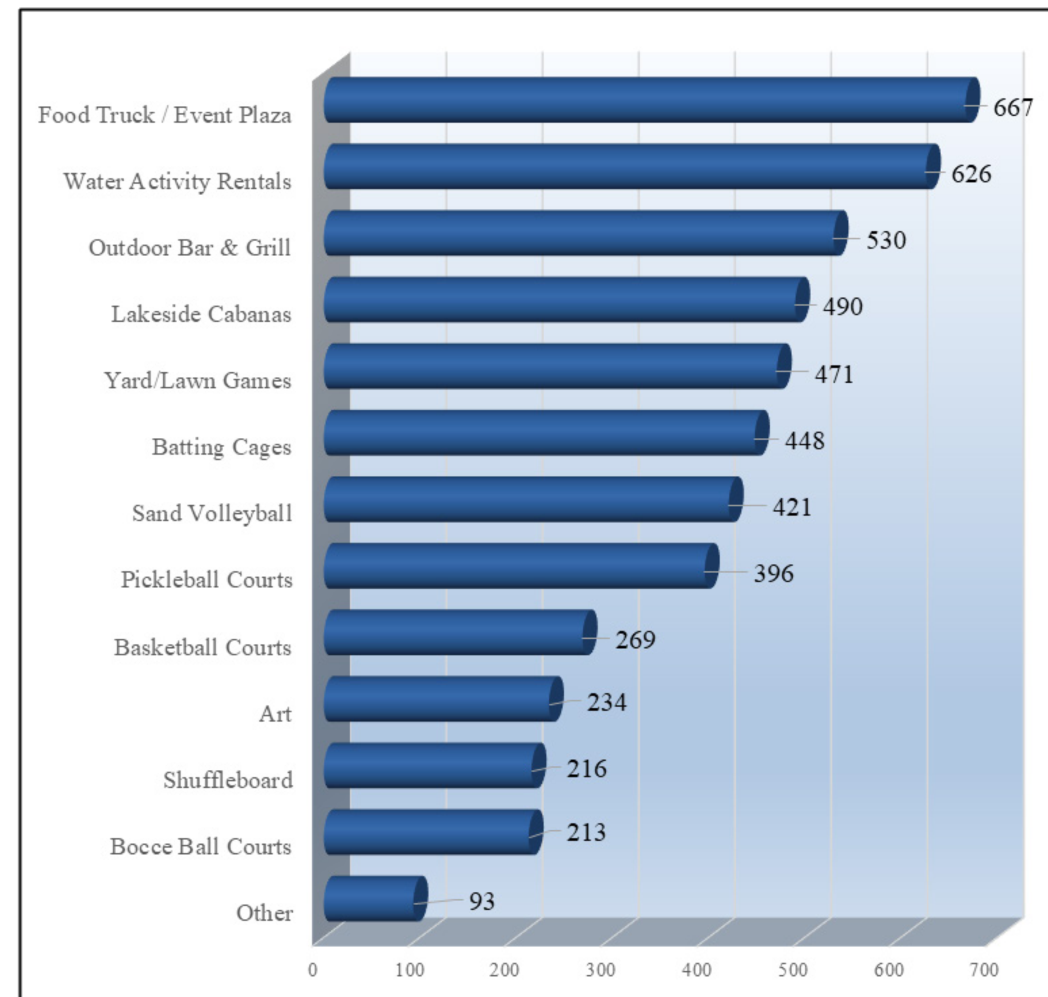
THE FOLLOWING IS A LIST OF INDOOR PROGRAMS THAT COULD TAKE PLACE ON AN **INDOOR ARTIFICIAL TURF SURFACE**. PLEASE CHECK ALL THAT YOU OR MEMBERS OF YOUR HOUSEHOLD WOULD BE INTERESTED IN.



THE FOLLOWING IS A LIST OF INDOOR PROGRAMS THAT COULD TAKE PLACE ON AN **INDOOR COURT SURFACE**. PLEASE CHECK ALL THAT YOU OR MEMBERS OF YOUR HOUSEHOLD WOULD BE INTERESTED IN.



THE FOLLOWING IS A LIST OF ACTIVITIES THAT COULD TAKE PLACE **OUTDOORS AT THE HUB**. PLEASE CHECK ALL THAT YOU OR MEMBERS OF YOUR HOUSEHOLD WOULD BE INTERESTED IN.



COMMUNITY UNDERSTANDING

COMMUNITY UNDERSTANDING

PEOPLE, PLACE AND PACE

BRS posed a series of 5 Questions to the Focus and Stakeholder Groups and to attendees at the first public meeting. These questions led to further defined guidelines for the project vision and allowed our design team to visualize and understand the People, Place, and Pace of St. Charles.

5 QUESTIONS

1. HOW DO YOU DESCRIBE WHERE YOU LIVE WHEN YOU ARE **AWAY** FROM ST. CHARLES?
2. **WHY** DO YOU LIVE IN ST. CHARLES?
3. WHAT PLACES OR EVENTS MUST VISITORS EXPERIENCE WHEN THEY ARE **HERE** IN ST. CHARLES?
4. HOW DO YOU **WANT** TO BE PERCEIVED AS A COMMUNITY?
5. HOW DO YOU **NOT WANT** TO BE PERCEIVED AS A COMMUNITY?

PEOPLE

Who are the people of St. Charles and how do they want to be perceived?

PLACE

Where do people live, work and play? Tell us about landmarks of interest and places of pride.

PACE

What experiences are you looking for and what is your pace of life?

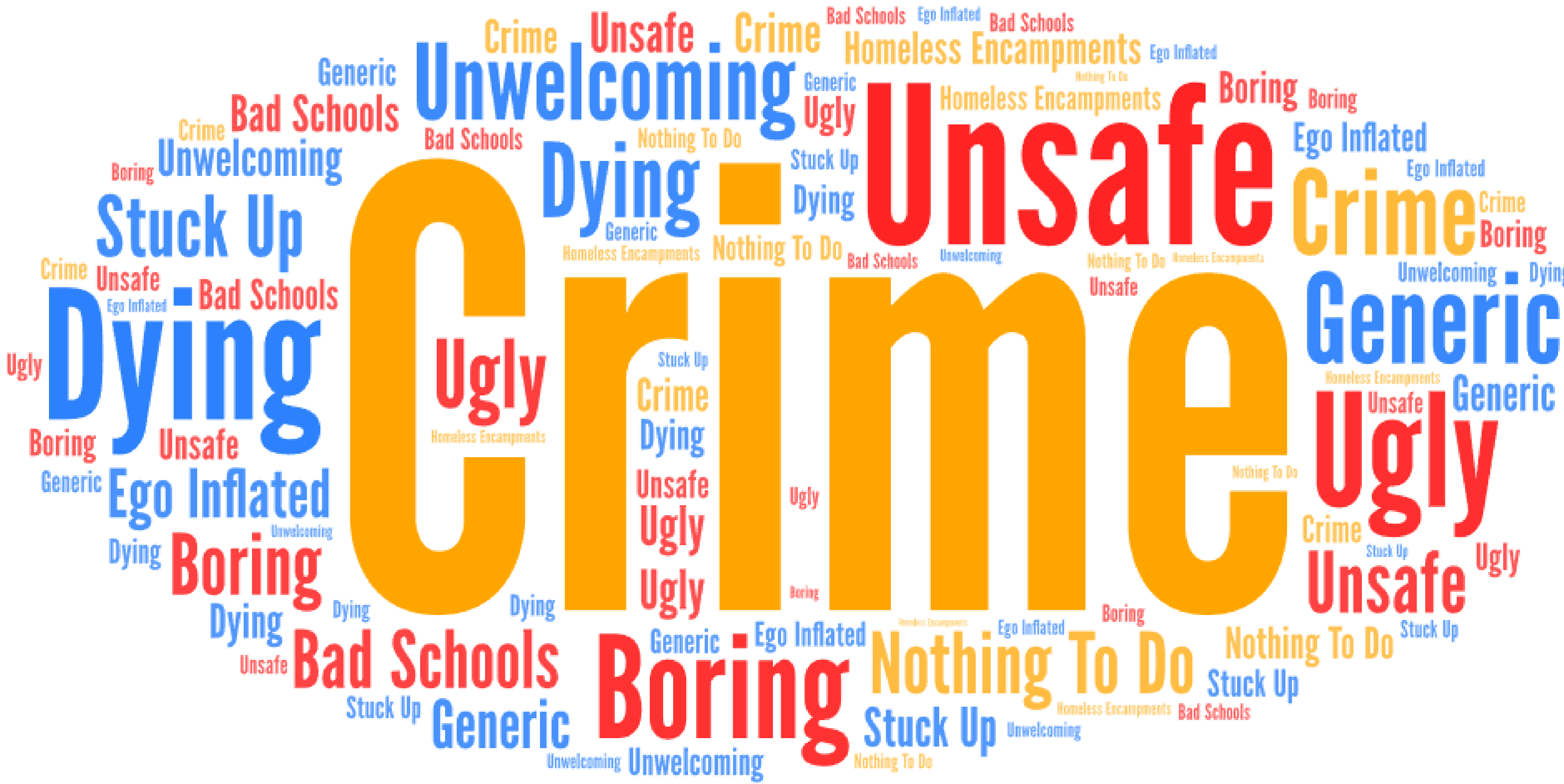
HOW DO YOU DESCRIBE WHERE YOU LIVE WHEN YOU ARE AWAY FROM ST. CHARLES?

WHY DO YOU LIVE IN ST. CHARLES?

WHAT PLACES OR EVENTS MUST VISITORS EXPERIENCE WHEN THEY ARE HERE IN ST. CHARLES?

HOW DO YOU WANT TO BE PERCEIVED AS A COMMUNITY?

HOW DO YOU NOT WANT TO BE PERCEIVED AS A COMMUNITY?



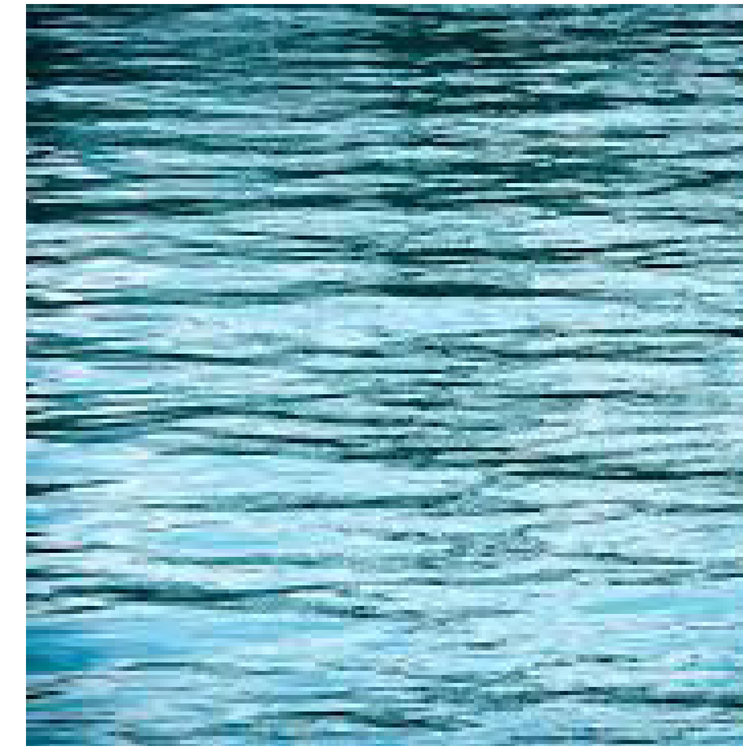
DESIGN THREADS

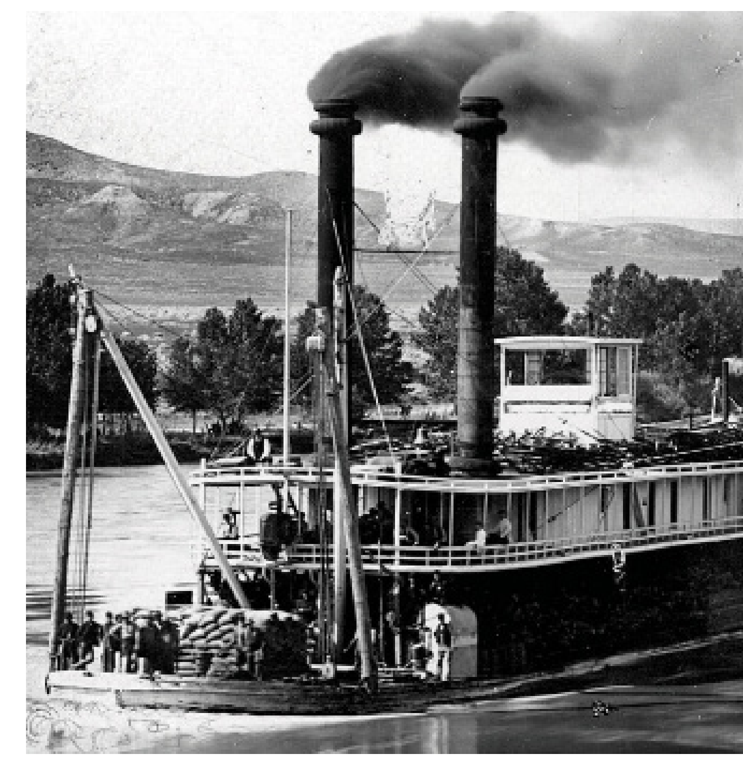
The five questions resulted in the formulation of defining guidelines and a vision for the project. The Design Threads are meant to connect with as many people within the community as possible and provide guidance to the design team as the concept evolves into something authentically reflective of the City of St. Charles. At their core, the design threads speak to the qualities of the People, the Place, and the Pace of life of St. Charles and possess a uniqueness that is specific to St. Charles, its identity, and its aspirations.

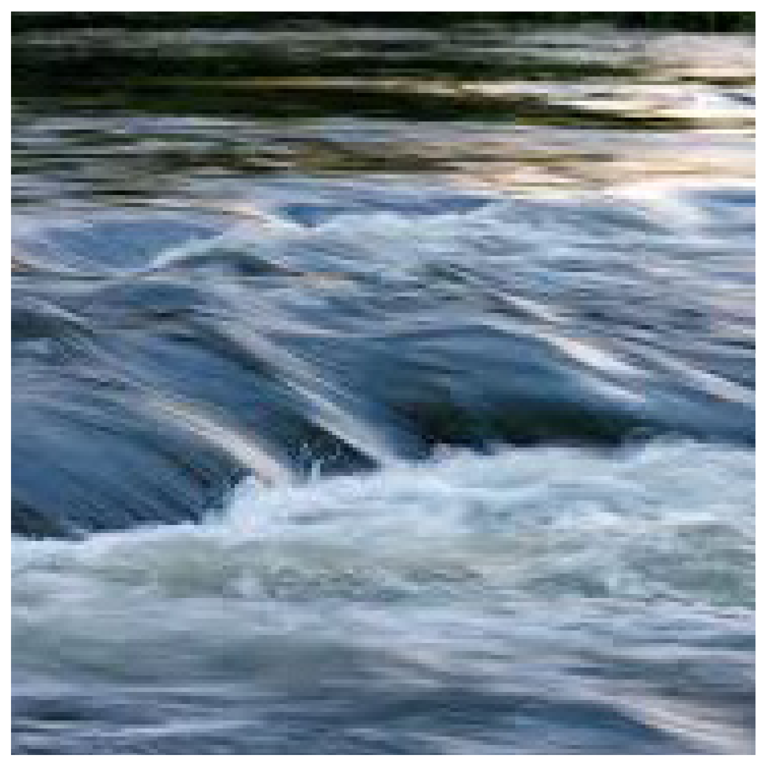
REFLECTION

HISTORY, PROGRESS, EXPLORATION

In the heart of St. Charles, Missouri, where the journey of Lewis and Clark commenced and Interstate 70 began, a rich tapestry of heritage and innovation unfolds.







CONVERGENCE

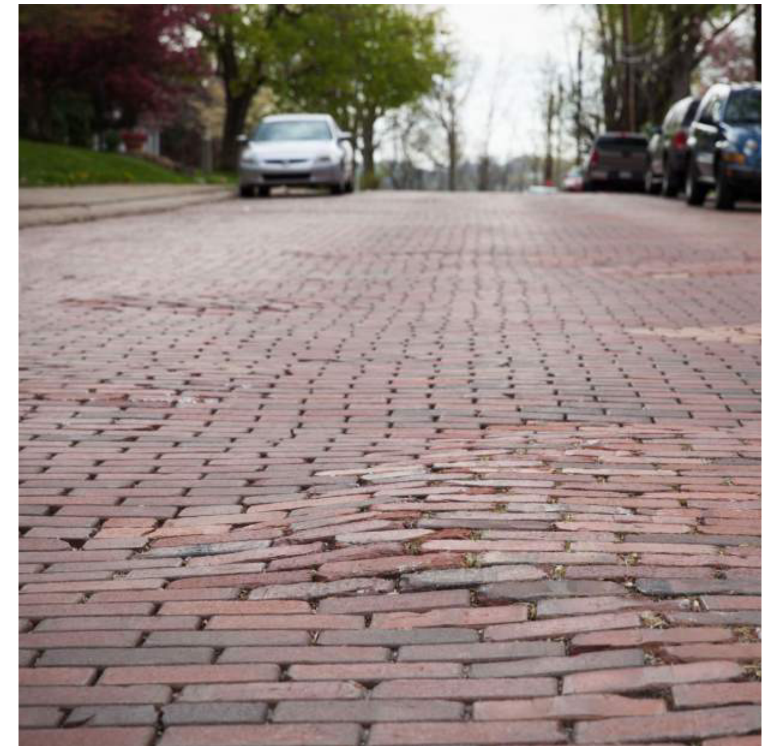
RIVERS, STREETS, IDEAS, CULTURES

From the distinctiveness of the five boroughs to the promising development of Riverpoint, this city is a canvas where the past and future converge.

IMPRESSION

LASTING, WELCOMING, MEMORABLE, INFLUENCE

We honor our roots embracing the boundless possibilities and weaving a narrative of resilience, inclusivity, and progress for the generations to come.



PROGRAM DEVELOPMENT

PROGRAM DEVELOPMENT

Though the St. Charles Parks and Recreation department accommodates many sports and recreational activities within St. Charles, the development of a fieldhouse program is new to the city. A concentrated effort was put forth in right-sizing the facility to accommodate as broad a reach as possible while still being true to the overall project objectives established through the initial Master Plan and the community engagement that followed.

THE FIELDHOUSE

To find the right solution, the design team explored various options and scenarios. Each option was reviewed based on how well it balanced budget, program, and schedule, how it impacted the operations of the facility and HUB, and the economic impact it would have on the region.

The final Fieldhouse program balances both the wants and needs of the community while providing an asset to St. Charles to leverage in the attraction of regional sports tourism events. Spaces were strategically placed to capture the greatest view of the HUB and Lake amenities to the south and provide visitors of the restaurant the ability to enjoy both the indoor offering of the Fieldhouse and access/visibility to the outdoor amenities of the HUB beyond.

The final Fieldhouse program reflects a holistic approach to the facility in which no single program dominates and where flexibility and a broad appeal to a wide spectrum of people was the goal. The final outcome is a result of many different scenarios and combinations that were balanced against the needs and wants of community and the overall objectives of the city and the vision for the Fieldhouse and HUB.

RECOMMENDED PROGRAM	GROSS SF
REQUIRED SPACES	
Administration	2,252
Lobby, Circulation, Restrooms & Support Spaces	11,301
RECREATION SPACES	
Hardcourt Fieldhouse	60,034
Turf Fieldhouse	32,950
COMMUNITY SPACE	
Multi-Purpose Room	3,444
Commercial Restaurant	7,022
	TOTAL: 117,003 SF

SUPPORT PROGRAM AREAS

ADMINISTRATION

Staff offices, workspaces, break room, and conference room.

LOBBY AND SUPPORT SPACES

Front desk, lounge, staging areas, public restrooms, building storage, mechanical spaces, lobby, and circulation space.

FIELDHOUSE AREAS

HARDCOURT FIELDHOUSE

Contains (6) High School basketball courts and (12) Volleyball cross courts suitable for multiple activities such as basketball, volleyball, pickleball, badminton, etc. The space is designed to accommodate a 28' clear height to the lowest projection and space for tip-and-roll spectator bleachers in various arrangements. Around the gym's perimeter is a Walk/Jog track with (3) three-foot-wide lanes designed to not interfere with the programming of the court activities.

TURF FIELDHOUSE

Contains a turfed area accommodating (1) 7v7 or (2) 4v4 indoor soccer fields. The space is intended to offer flexibility for a number of turf-oriented activities, including (4) drop-down batting cages. Around the turf perimeter is a Walk/Jog track with (3) three-foot-wide lanes designed to not interfere with the programming of the turf activities.

COMMUNITY PROGRAM AREAS

MULTI-PURPOSE ROOM

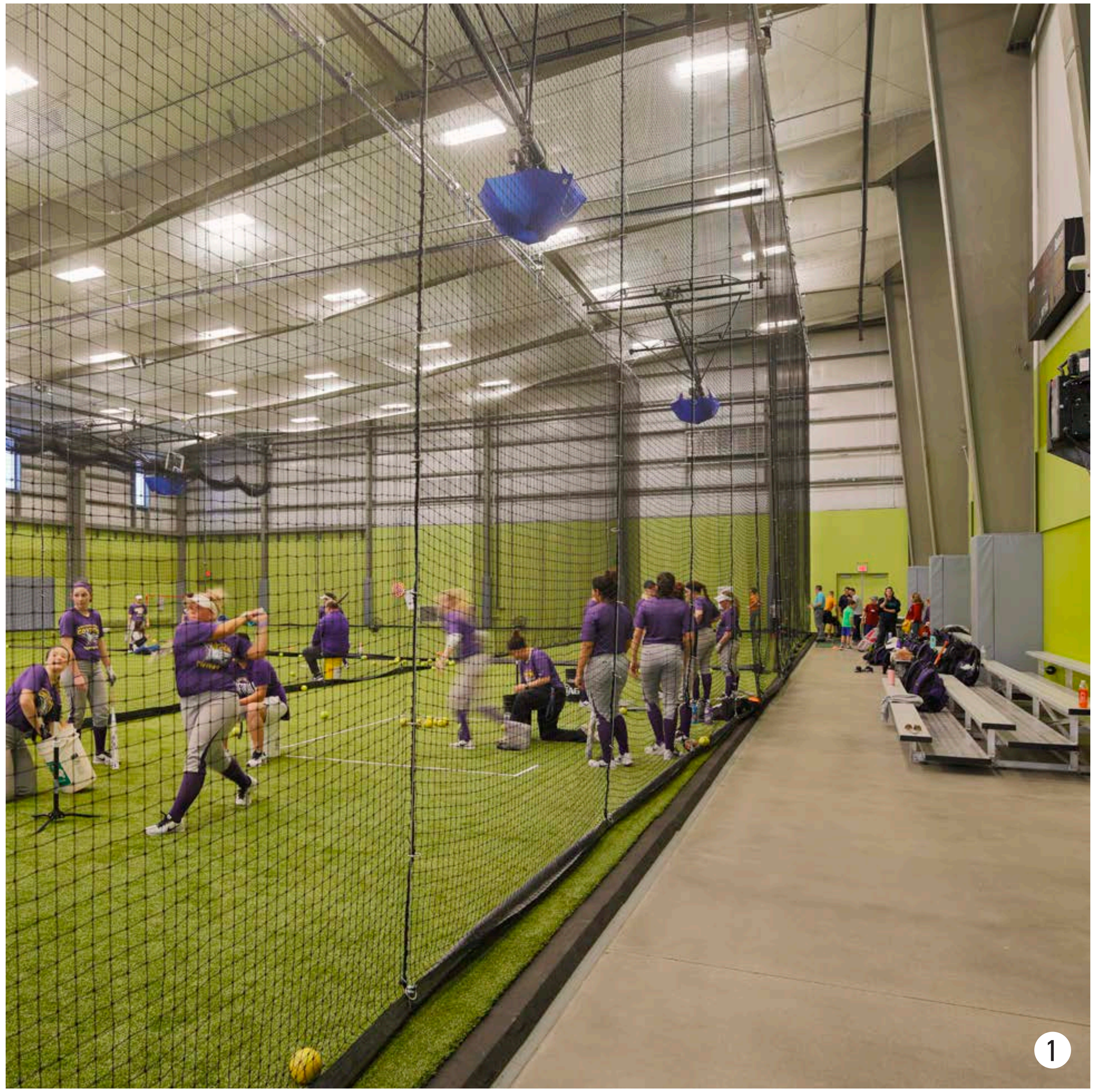
Dividable into two separate spaces, or as one larger space, the room is able to accommodate up to 200 people and is suitable for hobbies/special interests or athletic classes/training(s). This room also provides desirable rental space(s) for events, meetings, and celebrations with the adjacent restaurant that could offer catered food services. To provide additional flexibility, the space also provides operable glass doors into the main circulation corridor, allowing the space to be used in combination with the concourse of the Fieldhouse.

RESTAURANT

A restaurant, commercial kitchen, and full-service bar with a generous seating and outdoor patio. The space incorporates large upward-acting doors that allow for the seamless integration of the indoor space with the outdoor patio and the HUB beyond. The restaurant is intended to offer food and beverage to patrons of the Fieldhouse and HUB, the larger ~97 acre park, and the broader St. Charles community and visitors to the city.

PRECEDENTS
INTERIOR

1. Turf Fieldhouse
2. Lobby and Lounge
3. Hardcourt Fieldhouse
4. Multi-purpose room
5. Restaurant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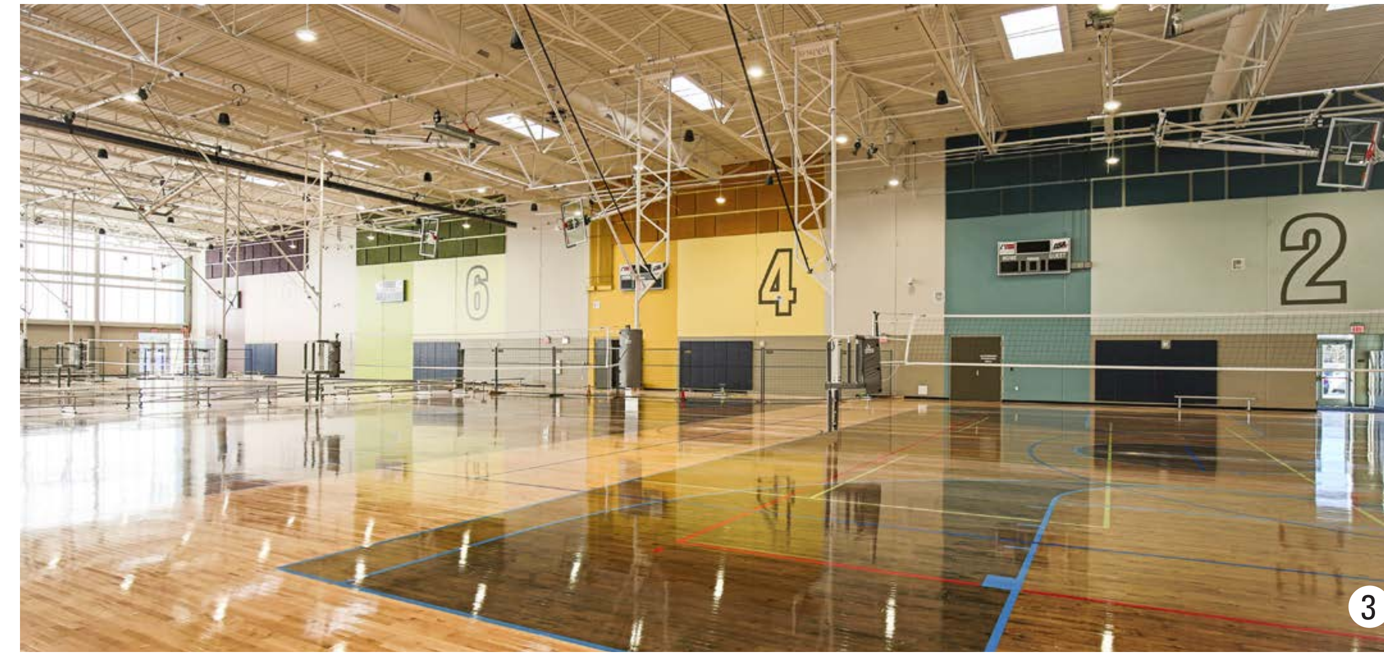

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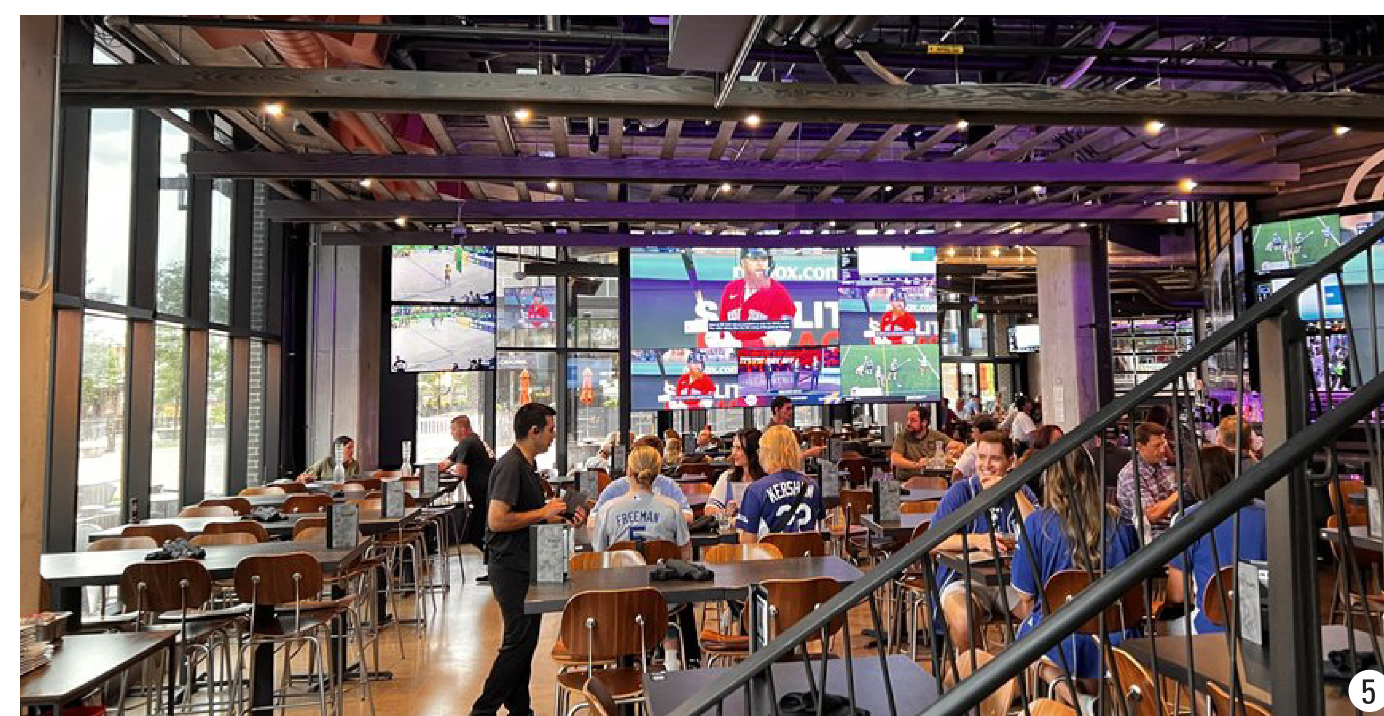
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PRECEDENTS
EXTERIOR

1. Sloped roofs, large expanses of glass, natural light, mixed cladding (metal and masonry/stone), and a prominent main entry with canopy/ protection from elements.

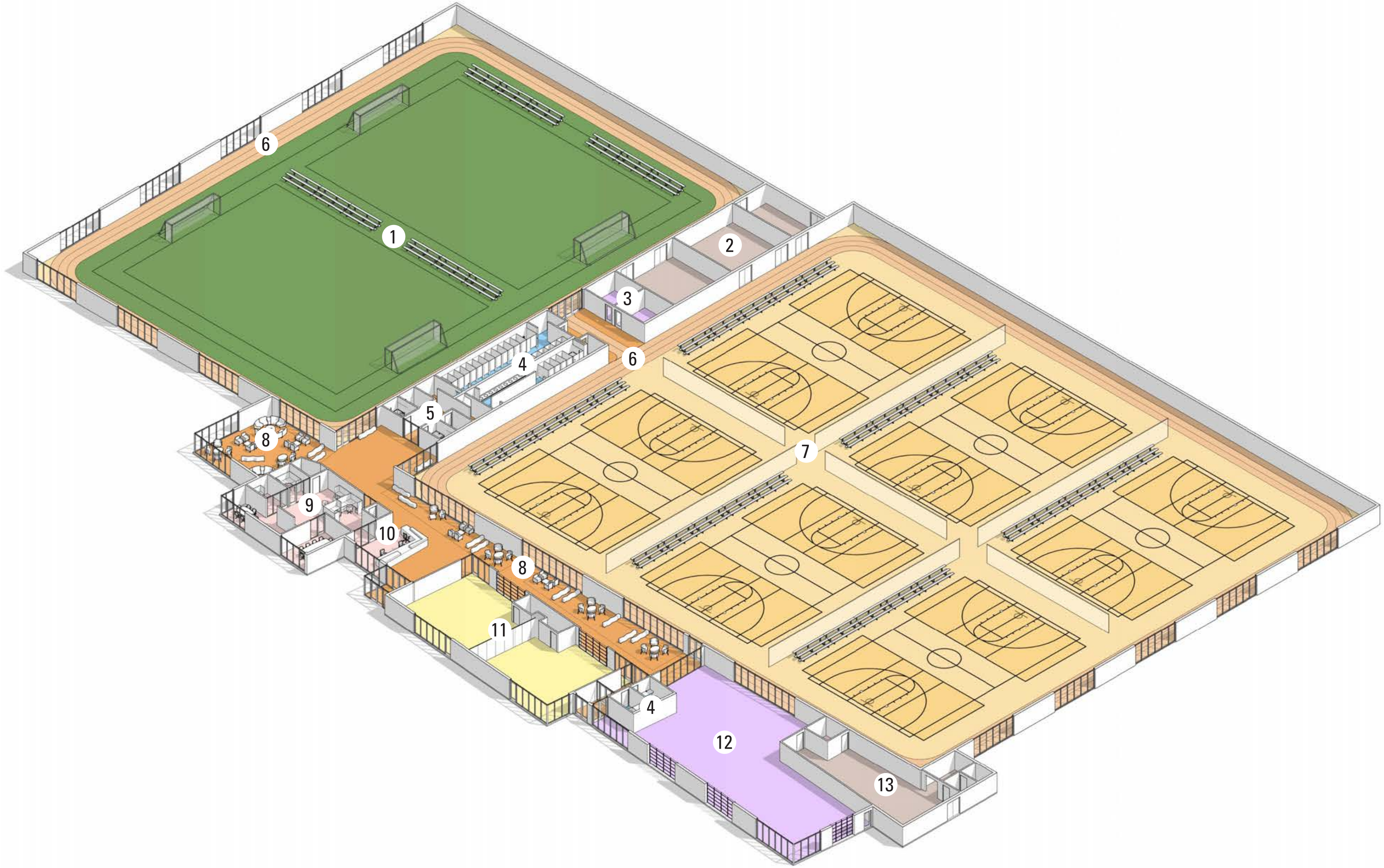
2. Sloped roofs, large expanses of glass, natural light, metal cladding, and transparent conditions integrated into the façade to strategically capture views.

3. Sloped roofs, large expanses of glass, natural light, metal cladding, and a prominent and transparent main entry integrated with the plaza landscape.

AXON PLAN

LEGEND

1. TURF FIELDHOUSE
2. STORAGE / BUILDING SERVICES
3. OFFICIALS ROOM
4. RESTROOMS
5. UNIVERSAL RESTOOMS
6. RUNNING TRACK
7. HARDCOURT FIELDHOUSE
8. LOUNGES
9. ADMINISTRATION OFFICE
10. WELCOME DESK
11. MULTIPURPOSE ROOMS
12. RESTAURANT
13. KITCHEN



SITE ANALYSIS

SITE ANALYSIS

As part of the previous Master Plan, the HUB vicinity and overall areas had been tentatively established. The project team's goal in this feasibility study was to further evaluate and design the HUB site and to more closely look at the proposed activities/amenities that were to be located in the HUB boundaries and to evaluate these amenities as they relate to the programmatic outcomes of the Fieldhouse. Another important consideration was to create an environment that would be desirable to a broad spectrum of people and act as an anchor for the overall park.

The design team studied the site, examining grading, slopes, vegetation, the proposed lake, winds, and solar orientation. The team also examined entry and arrival sequences, site access and circulation, vehicular and pedestrian traffic, trail connections, and connections to the school amenities beyond.

The design team provided site test fit options to the Focus/Stakeholder groups and the Executive Team showing various scenarios and analyzing the potential fieldhouse on the site in different configurations and locations. At the time of the site test fit, the scope of work ranged from a footprint of 73,000 SF to 304,000 SF and with up to 720 parking stalls. This effort allowed the team to find the optimum building location and layout based on the site's influences, the outdoor HUB amenities that were being considered, and the objectives of the city.

~97-ACRE PARK MASTER PLAN

The ~97-Acre Park Master Plan centers around the development of a state-of-the-art Fieldhouse, complemented by a range of amenities designed to enhance recreational opportunities, community engagement, and tourism. The following pages outline the envisioned layout and features of The Hub, offering a comprehensive overview of the project's scope and amenities developed to support and enhance recreational value surrounding the Fieldhouse.

THE HUB

SITE PLAN

PHASE 1

1. LAKESIDE LAWN
2. RESTAURANT PATIO (7,200 SQFT)
3. FIELDHOUSE ENTRY PLAZA
4. GRASSY BERM
5. LAKESIDE CABANAS
6. PAVILIONS (20X20)
7. GAME LAWN
8. WATERFRONT TRAIL
9. LAKE (11 ACRES)
10. WATERFRONT PLAZA
11. FOOD TRUCK PROMENADE
12. MINIGOLF (36 HOLE)
13. BOAT RENTAL BUILDING
14. BOAT LAUNCH BOARDWALK
15. PICNIC AREA
16. BATTING CAGES (8-STALL)
17. DISC GOLF TRAILHEAD & PAVILION

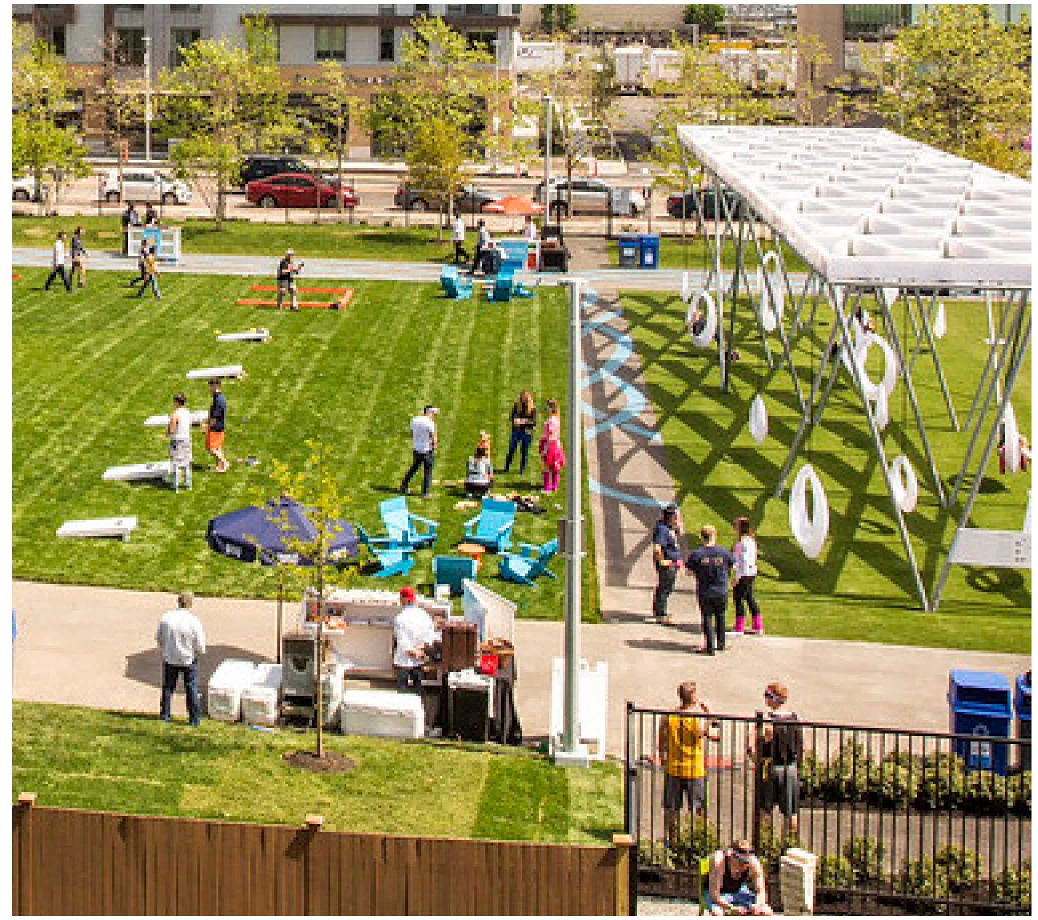
P PARKING AREA COUNT: 480

HUB CONCEPT

THE HUB
Surrounding the Fieldhouse, The HUB will provide a wide range of amenities that attract local and regional visitors. The diverse recreational offerings will provide a unique and exciting experience, further enhancing the City of St. Charles park offerings and inspiring visitors to return for new adventures.

LAKE
Adjacent to the Fieldhouse, a picturesque 10-12 acre lake will serve as a serene backdrop and a central attraction. The lake will offer opportunities for water recreation, fishing, and scenic walks, enhancing the site's natural beauty and providing a tranquil escape for visitors. This natural feature will draw nature lovers and tourists, increasing foot traffic and supporting local businesses.

WATERFRONT TRAIL
The Waterfront Trail will meander around the lake, offering a scenic route for walking, jogging, and biking. This trail will provide visitors with an opportunity to enjoy the natural beauty of the site while engaging in physical activity. The trail will include rest areas with benches and informational signage about the local ecosystem, creating an educational and recreational experience. This feature will appeal to fitness enthusiasts, families, and nature lovers, adding to the site's attractiveness as a day-trip destination.

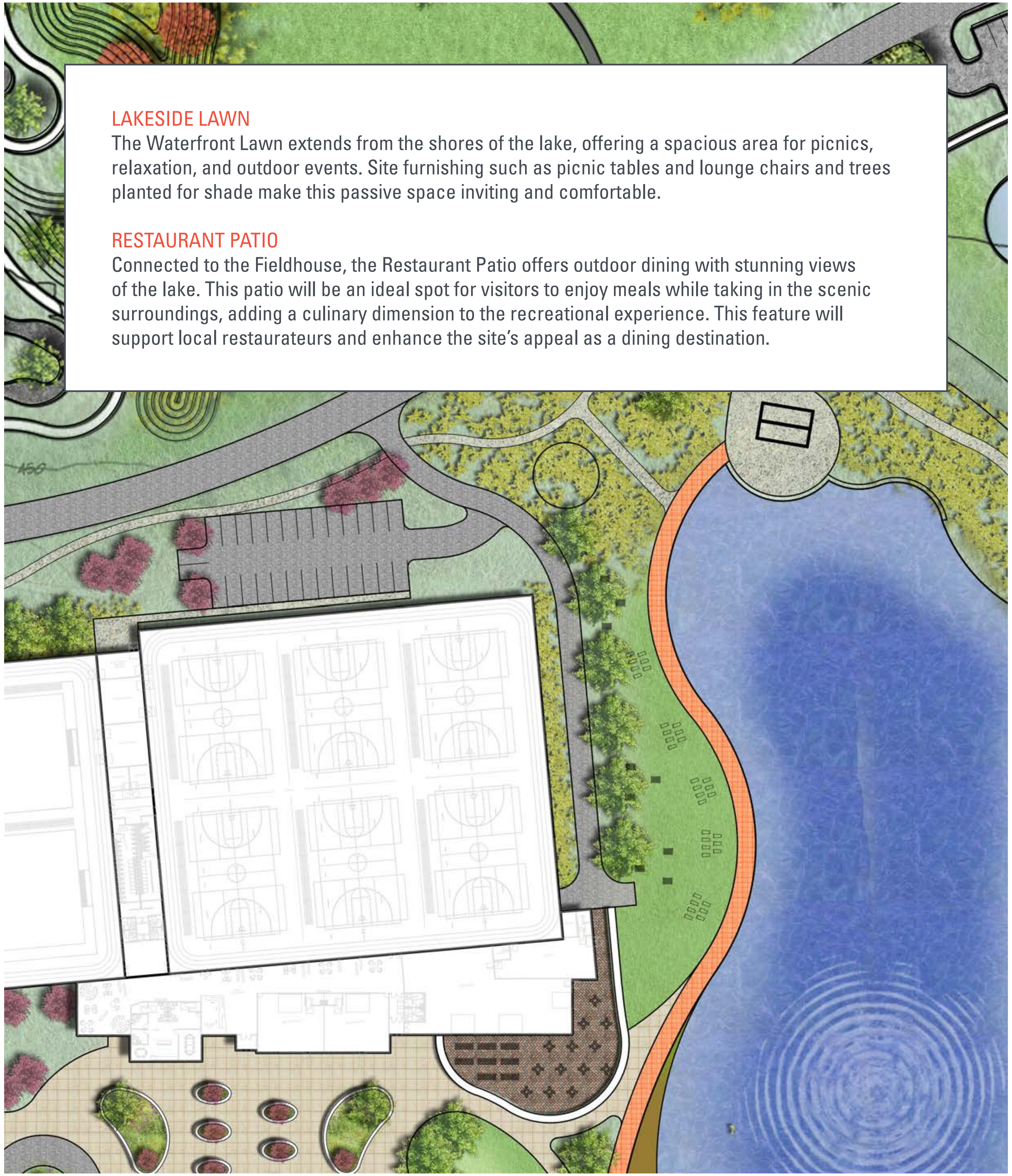


LAKESIDE LAWN

The Waterfront Lawn extends from the shores of the lake, offering a spacious area for picnics, relaxation, and outdoor events. Site furnishing such as picnic tables and lounge chairs and trees planted for shade make this passive space inviting and comfortable.

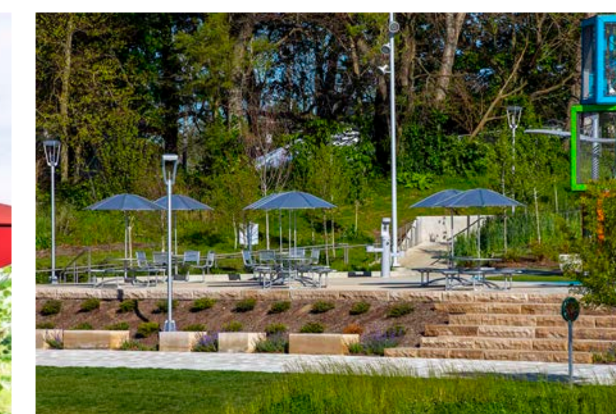
RESTAURANT PATIO

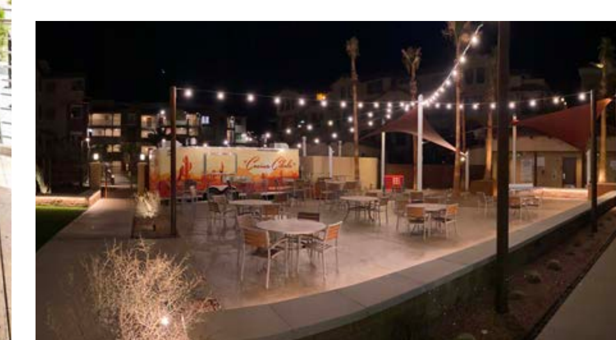
Connected to the Fieldhouse, the Restaurant Patio offers outdoor dining with stunning views of the lake. This patio will be an ideal spot for visitors to enjoy meals while taking in the scenic surroundings, adding a culinary dimension to the recreational experience. This feature will support local restaurateurs and enhance the site's appeal as a dining destination.

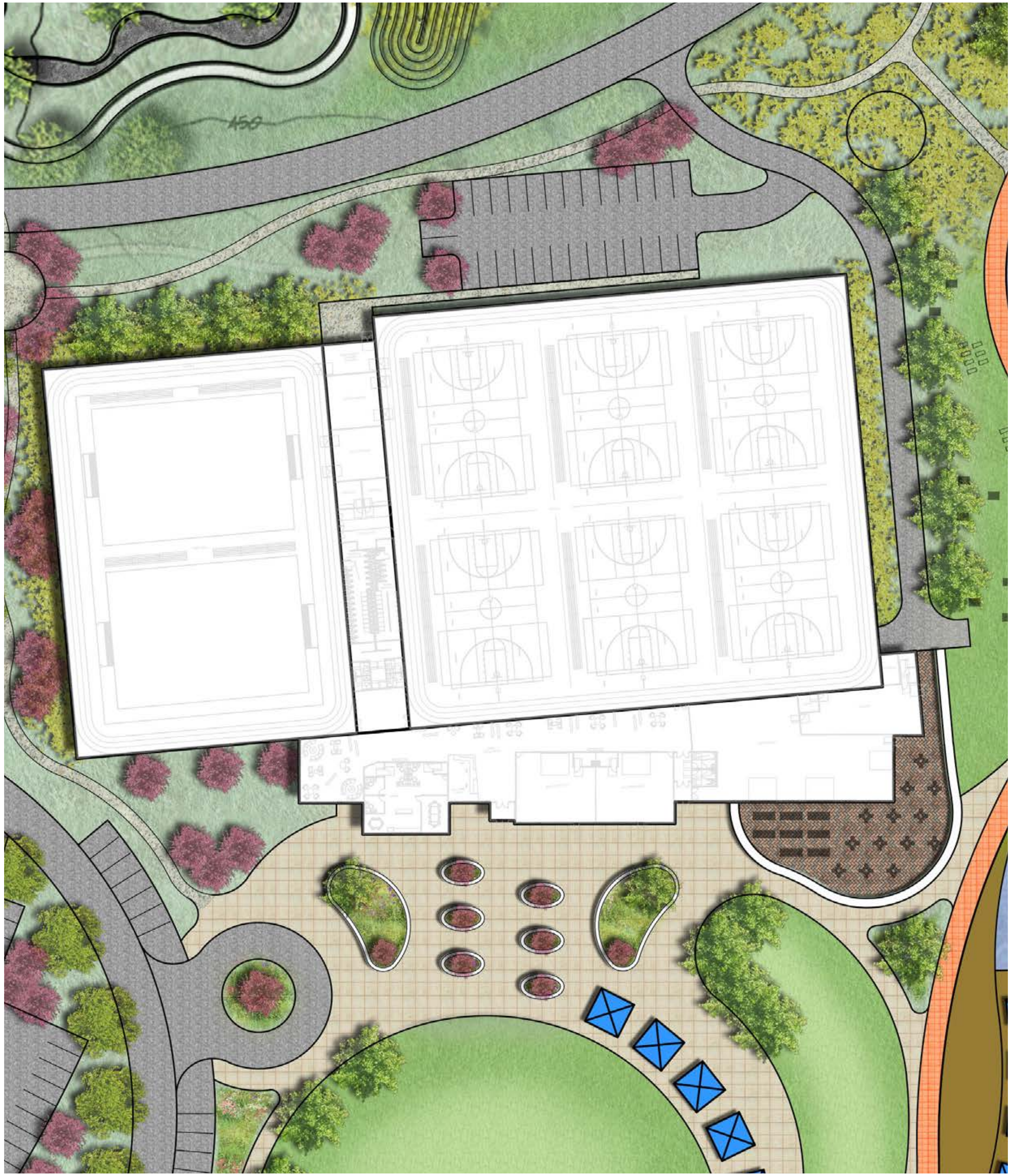


LAKESIDE LAWN

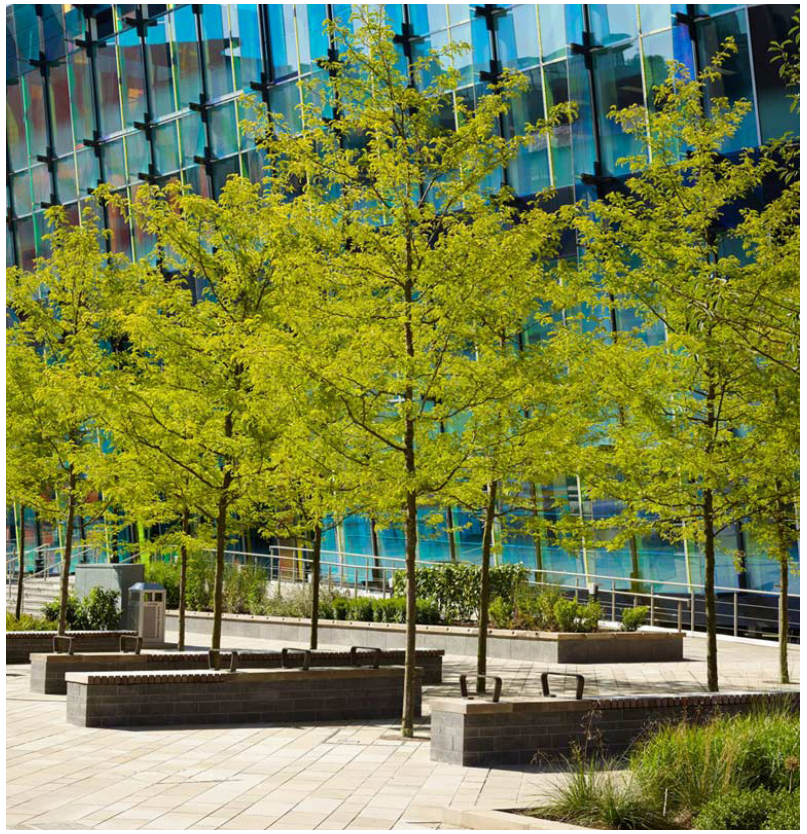
RESTAURANT PATIO

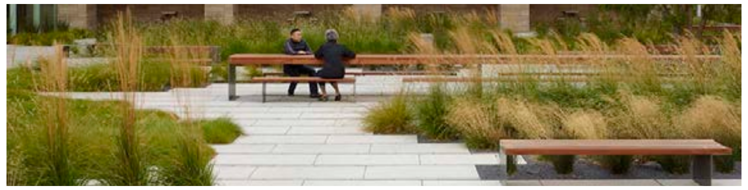






FIELDHOUSE ENTRY PLAZA



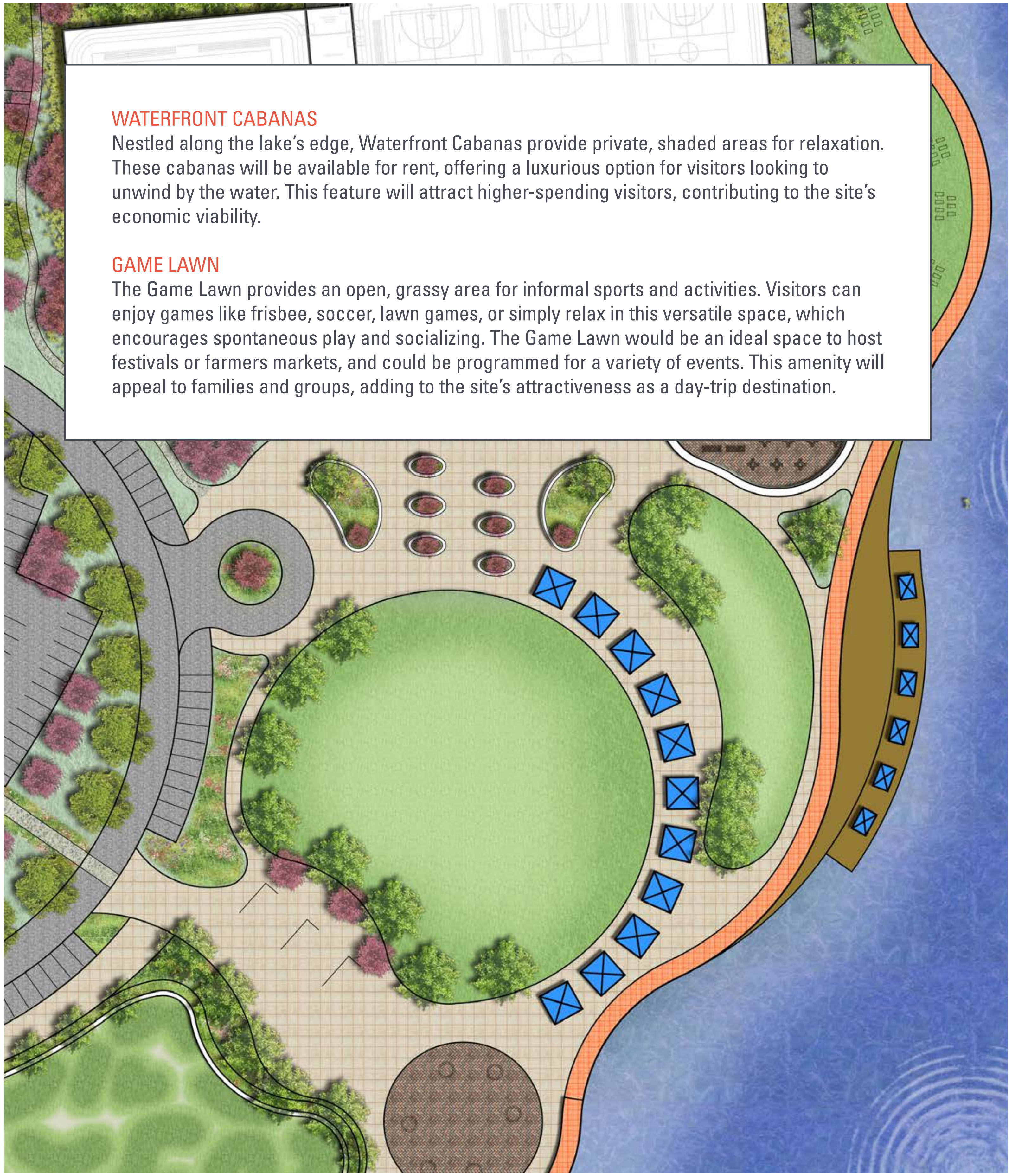


WATERFRONT CABANAS

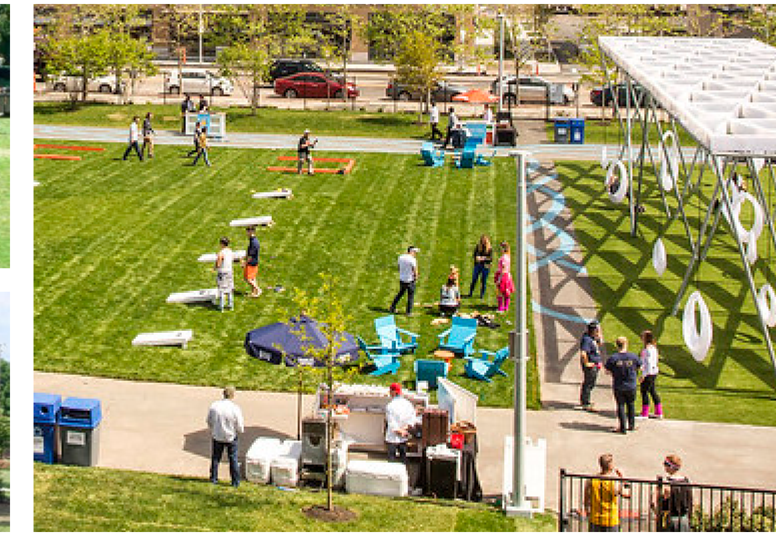
Nestled along the lake's edge, Waterfront Cabanas provide private, shaded areas for relaxation. These cabanas will be available for rent, offering a luxurious option for visitors looking to unwind by the water. This feature will attract higher-spending visitors, contributing to the site's economic viability.

GAME LAWN

The Game Lawn provides an open, grassy area for informal sports and activities. Visitors can enjoy games like frisbee, soccer, lawn games, or simply relax in this versatile space, which encourages spontaneous play and socializing. The Game Lawn would be an ideal space to host festivals or farmers markets, and could be programmed for a variety of events. This amenity will appeal to families and groups, adding to the site's attractiveness as a day-trip destination.

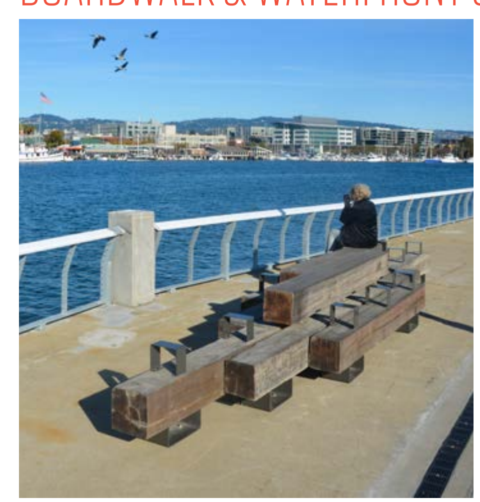


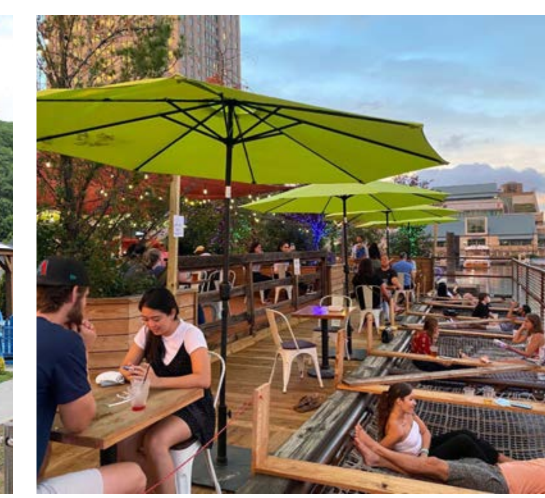
GAME LAWN



GRASSY BERM

BOARDWALK & WATERFRONT CABANAS





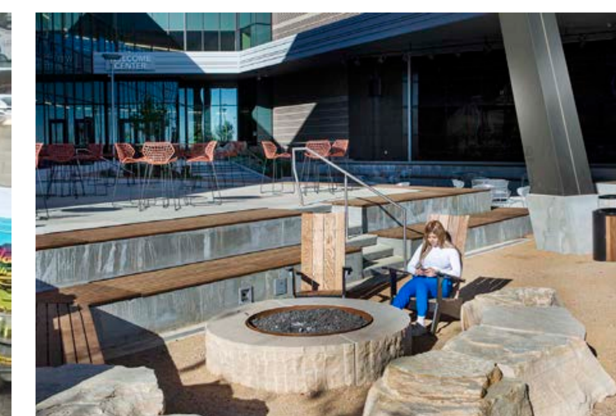
FOOD TRUCK PROMENADE
The Food Truck Promenade features a rotating selection of food trucks, offering diverse culinary options. This area will add a dynamic and festive atmosphere to the site, catering to a wide range of tastes and preferences. This promenade will support local entrepreneurs and enhance the site's reputation as a vibrant, food-friendly destination.

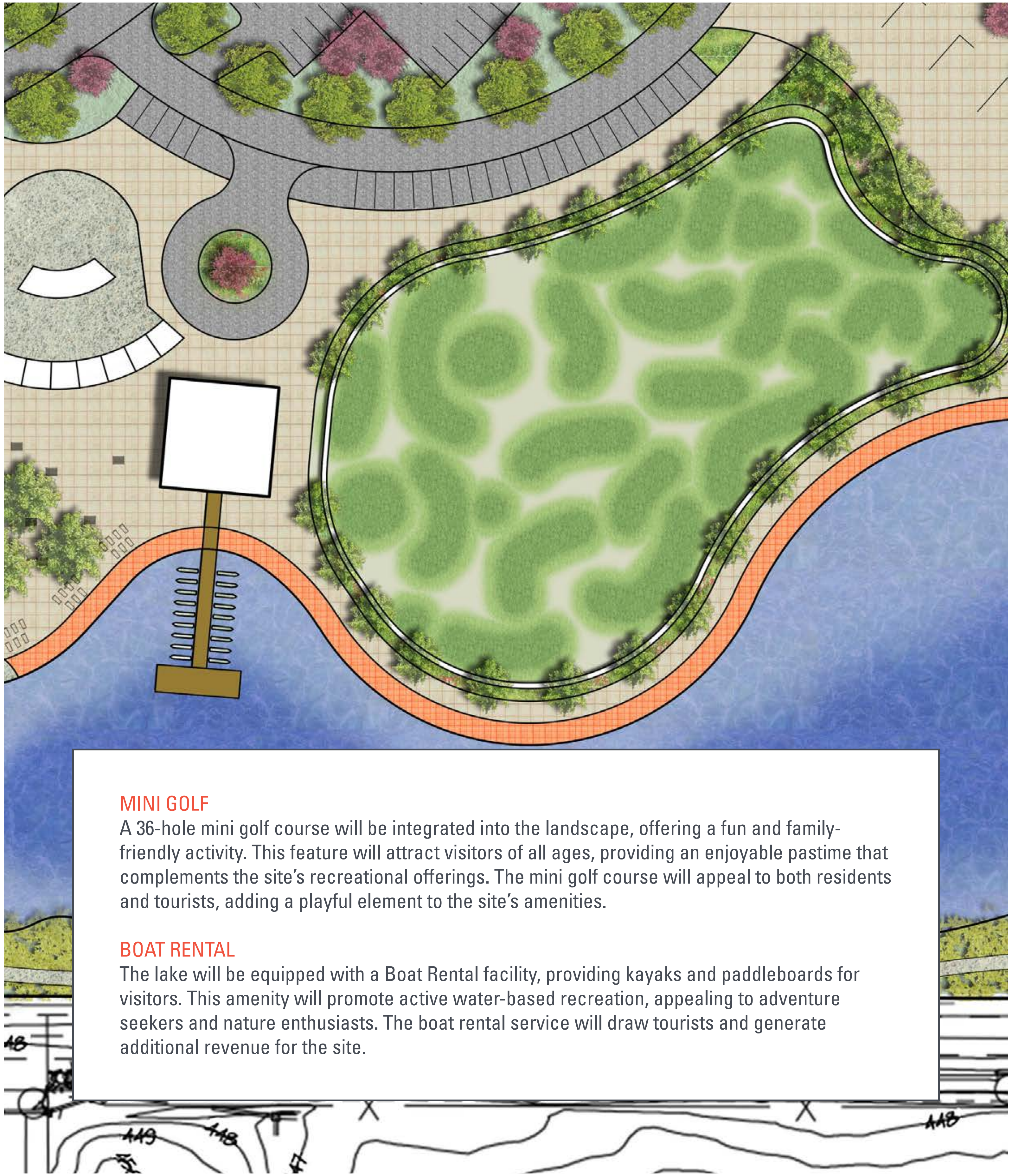
WATERFRONT LAWN AND PLAZA
At the focal point of The Hub lies the Waterfront Plaza, a bustling area with pathways, seating, and access to various amenities. This plaza will serve as a central gathering spot, fostering community interaction and engagement while providing an attractive destination for tourists.

TEAM RENTAL PAVILIONS
Strategically placed around the Game Lawn, Team Rental Pavilions offer sheltered spaces for groups and teams to gather, whether for pre-game meetings, post-game celebrations, or casual get-togethers. These pavilions enhance the site's functionality for organized sports and events, supporting both local teams and visiting sports groups.

FOOD TRUCK PROMENADE

WATERFRONT PLAZA





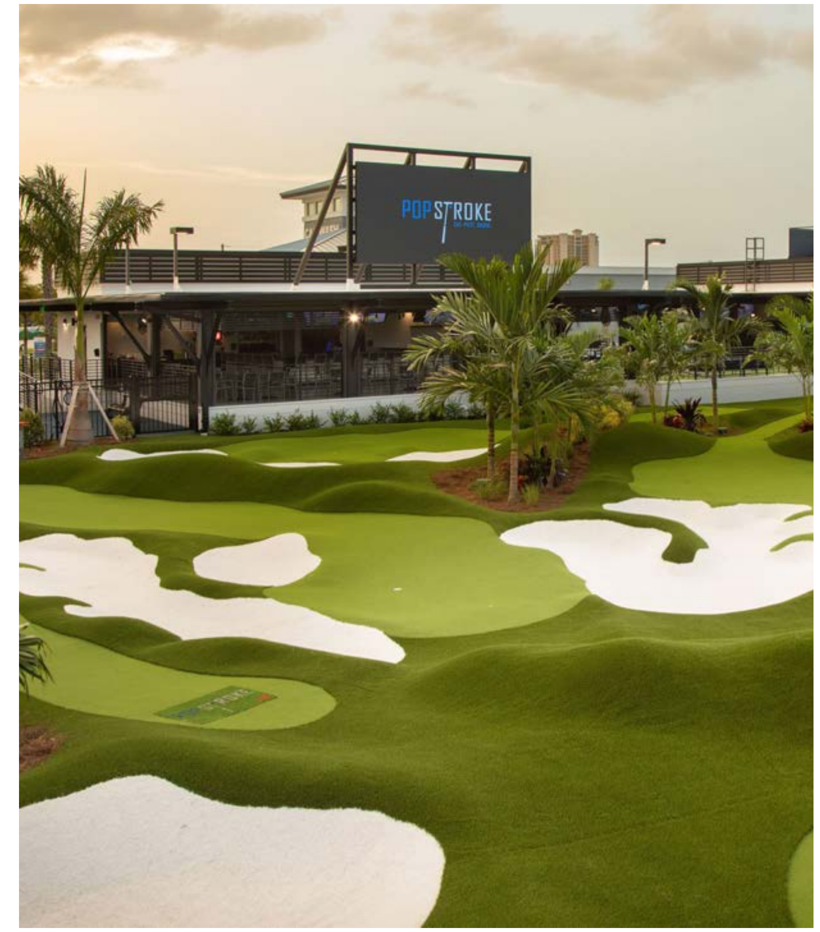
MINI GOLF

A 36-hole mini golf course will be integrated into the landscape, offering a fun and family-friendly activity. This feature will attract visitors of all ages, providing an enjoyable pastime that complements the site's recreational offerings. The mini golf course will appeal to both residents and tourists, adding a playful element to the site's amenities.

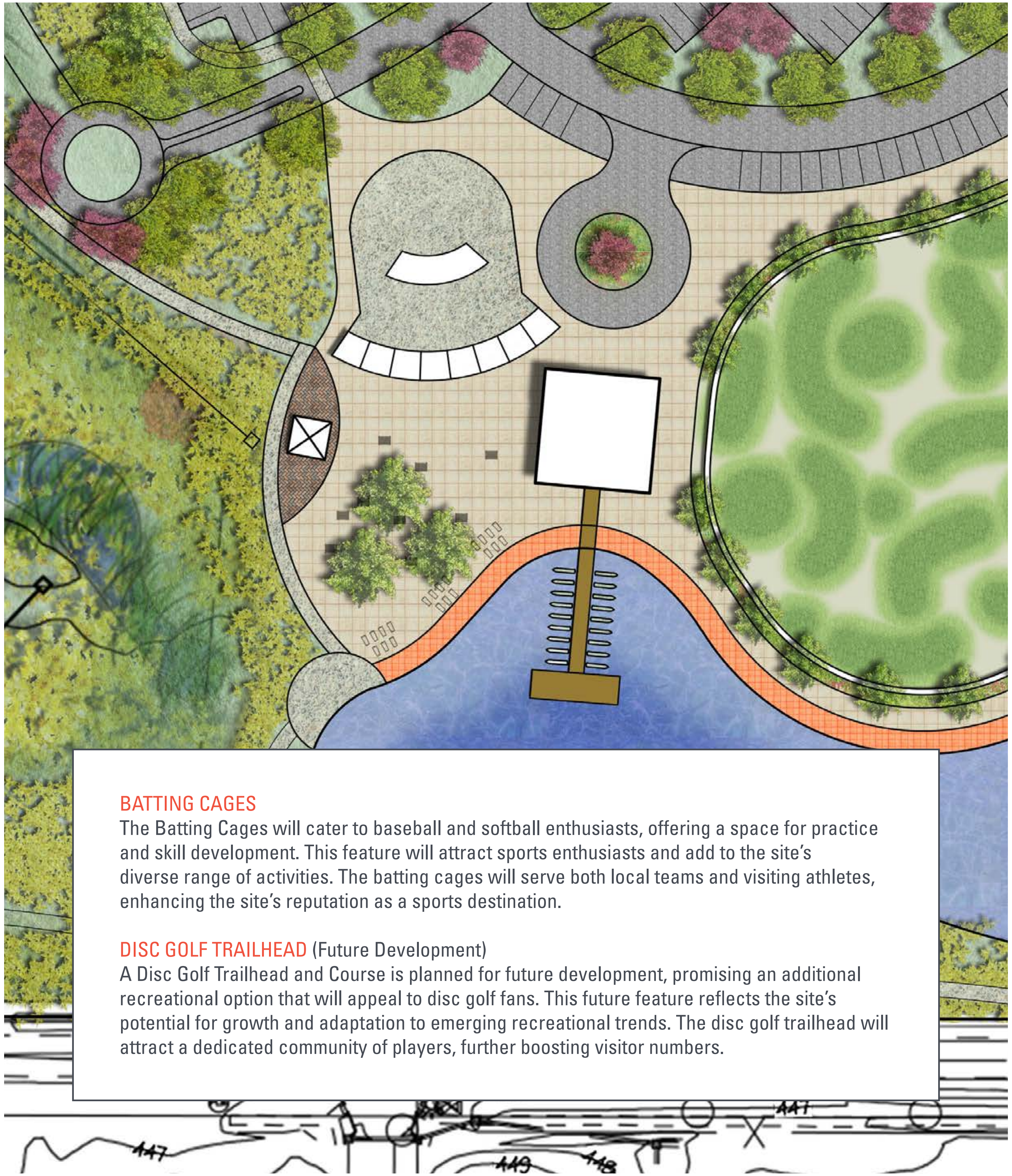
BOAT RENTAL

The lake will be equipped with a Boat Rental facility, providing kayaks and paddleboards for visitors. This amenity will promote active water-based recreation, appealing to adventure seekers and nature enthusiasts. The boat rental service will draw tourists and generate additional revenue for the site.

MINI GOLF



BOAT RENTAL BUILDING & DOCK



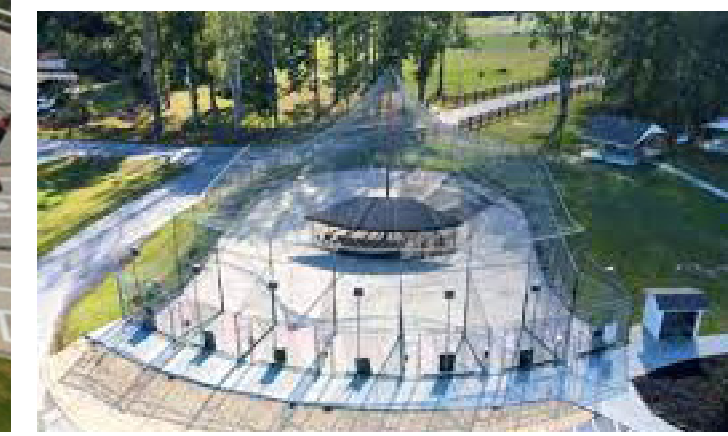
BATTING CAGES

The Batting Cages will cater to baseball and softball enthusiasts, offering a space for practice and skill development. This feature will attract sports enthusiasts and add to the site's diverse range of activities. The batting cages will serve both local teams and visiting athletes, enhancing the site's reputation as a sports destination.

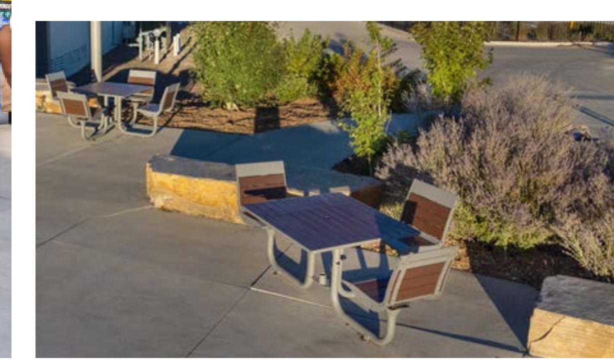
DISC GOLF TRAILHEAD (Future Development)

A Disc Golf Trailhead and Course is planned for future development, promising an additional recreational option that will appeal to disc golf fans. This future feature reflects the site's potential for growth and adaptation to emerging recreational trends. The disc golf trailhead will attract a dedicated community of players, further boosting visitor numbers.

BATTING CAGES



DISC GOLF TRAILHEAD & PICNIC AREA



COMBINED VALUE OF THE FIELDHOUSE AND HUB

The synergy between the Fieldhouse and the surrounding Hub amenities significantly enhances the overall value of the site, making Fieldhouse and Hub a premier destination for both residents and tourists. The combination of a state-of-the-art indoor sports facility with diverse outdoor recreational options ensures a comprehensive and dynamic visitor experience.

CONTINUOUS ENGAGEMENT AND VARIETY

Visitors will be drawn to the site for various reasons, whether it's to participate in organized sports at the Fieldhouse or to enjoy a leisurely day at the Hub. The variety of activities available ensures that there is something for everyone, from competitive athletes to casual visitors. This diversity not only attracts a broad audience but also encourages repeat visits, as guests can explore different activities each time they come.

ENHANCED VISITOR EXPERIENCE

The integrated amenities create a seamless experience where visitors can easily transition from one activity to another. For example, a family might spend the morning playing mini golf, enjoy lunch at the Food Truck Promenade, and then relax by renting a kayak on the lake in the afternoon. This variety keeps visitors engaged and ensures that every visit can offer something new and exciting.

COMMUNITY IMPACT

The comprehensive development of Fieldhouse and Hub will significantly boost the local economy by attracting residents and tourists alike. Increased foot traffic will benefit local businesses, while the diverse range of amenities will make the area a desirable destination for visitors from surrounding regions. The site will foster community engagement, promote healthy lifestyles, and provide a venue for various events and activities, enhancing the quality of life for local residents.

CONCLUSION

The Fieldhouse and Hub master plan presents a comprehensive vision for a multi-functional recreational area centered around the Fieldhouse. With its diverse range of amenities, the site is poised to become a vibrant community hub, promoting health, wellness, and social interaction. The integration of natural features, such as the lake and waterfront areas, alongside structured recreational facilities, ensures a balanced and inviting environment for all visitors. The development will not only serve the local community but also attract tourists, boosting the local economy and fostering a sense of pride and engagement among residents. The combined offerings of the Fieldhouse and Hub promise continuous engagement and variety, ensuring visitors will keep returning for new experiences and lasting memories.

BUDGET, SCHEDULE & PHASING

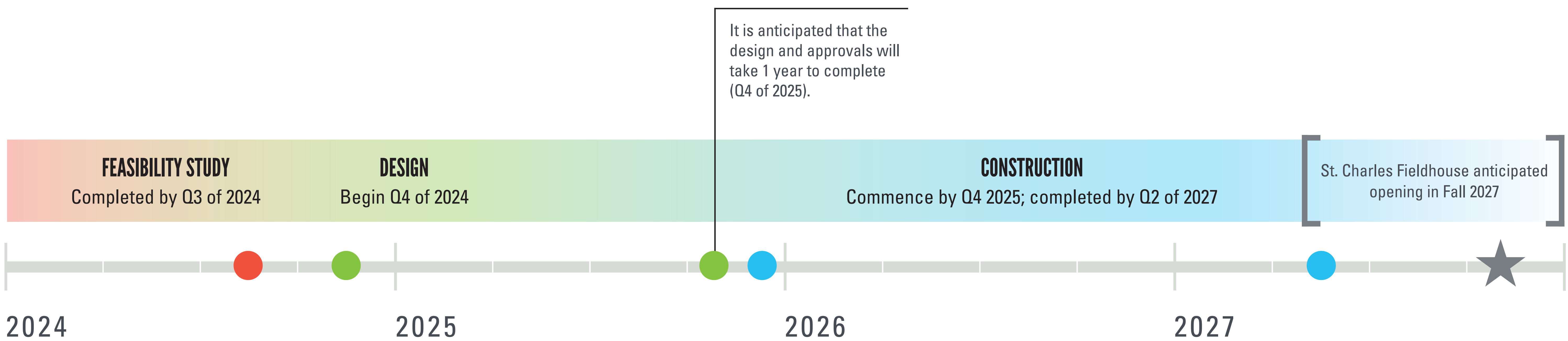
TOTAL PROJECT BUDGET

Five elements of a Total Project Budget were used to calculate the St. Charles Fieldhouse and HUB project:

1. Facility Construction "Hard Costs" Escalated to Q2 2026
2. Site Construction "Hard Costs" Escalated to Q2 2026
3. 15% Contingency (5% Owner, 5% Design, 5% Construction)
4. "Soft Costs" which include Architecture and Engineering fees, Owners Rep fees, Preconstruction Service fee, Permit fees, Misc. Testing, Geotechnical and Surveying Fees, Furniture Fixtures & Equipment

FACILITY CONSTRUCTION	$38,560,000
SITE CONSTRUCTION	$15,165,000
TOTAL CONSTRUCTION	$53,724,000
15% CONTINGENCY	$8,055,000
SOFT COSTS	$9,020,000
TOTAL PROJECT BUDGET	**$70,800,000**

PROJECT SCHEDULE



PHASING

The Fieldhouse and HUB, along with the lake, lake edge, and lake infrastructure, are all currently considered to be phased concurrently with each other. An access road off Highway 94 connecting the main site entry to the HUB is also considered to be phased with the overall Fieldhouse and HUB project. As many different funding and phasing options are possible with a project of this scale and complexity, further evaluation is needed to explore all potential phasing scenarios to allow for the most effective phasing and staging of the potential build-out of the entire ~97-acre park site.

MARKET ANALYSIS

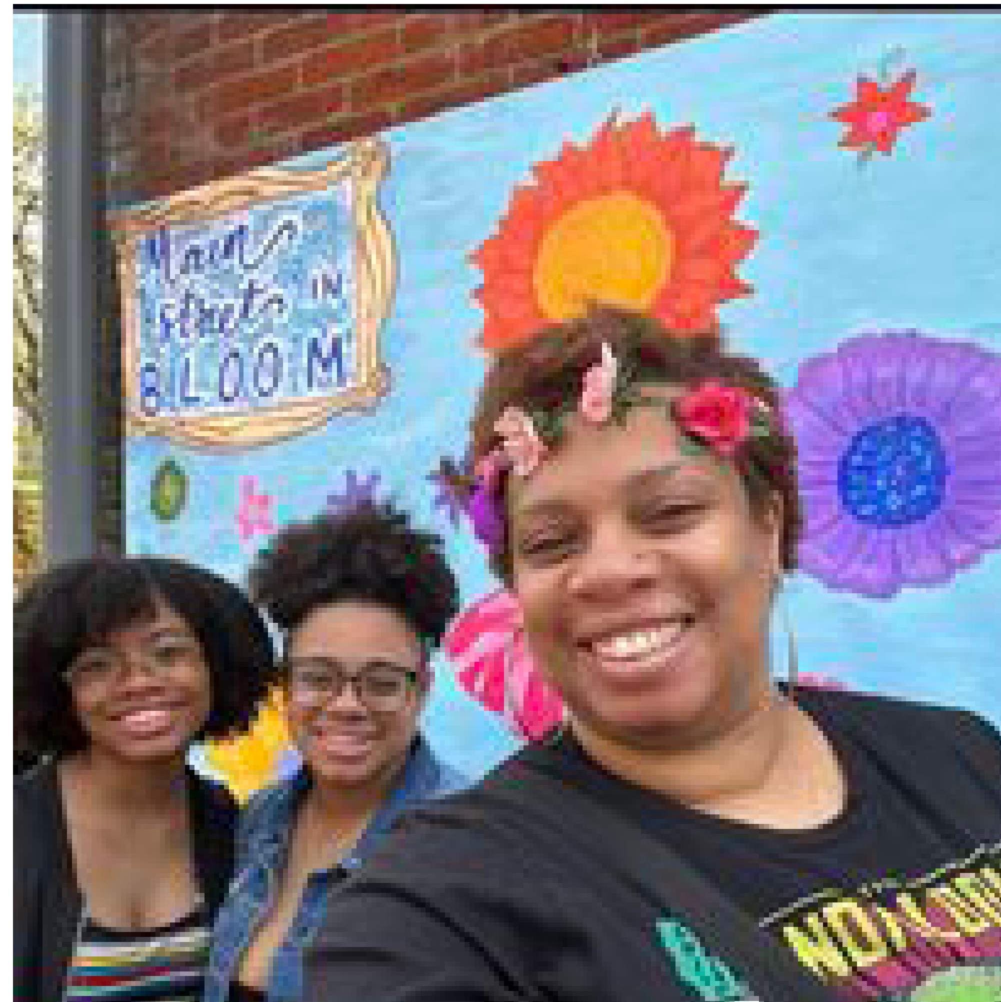
DEMOGRAPHICS

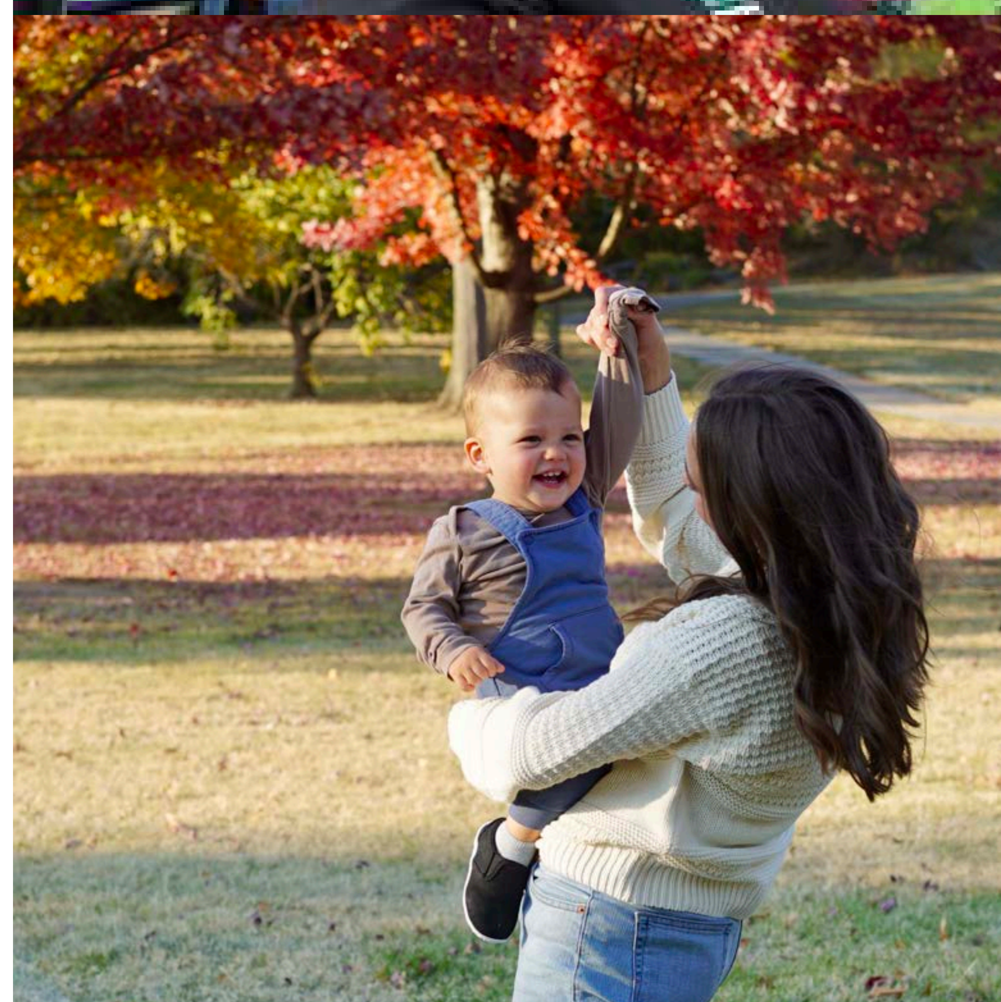
The following summarizes the demographic characteristics of the service areas.

- The population figures within the City of St. Charles suggests that the community is large enough to support an indoor facility with a focus on recreation programming. The population within the Primary and Secondary Service Areas are large enough to assist in the support of that facility from a recreation program perspective, but also from an event and economic impact perspective.
- The median age in all the service areas is similar, hovering either at or slightly greater than the state and national figures. This median age points to the presence of families with children, which is a key user group for this facility type. This is further emphasized as the percentage of household with children increases the further out from St. Charles one goes.
- The median household income in the City, Primary and Secondary Service Areas is greater than the State of Missouri and equal to the national figures.
- In terms of spending patterns on housing and for entertainment/ recreation it would indicate that the data points are aligned. The spending in the service areas is around the national figure of 100. This would indicate to B*K that there is the potential to see an increase in spending for services and programs that could be offered at a new facility.
- The age distribution in the Immediate and Primary Service Areas are consistent with the median age being at or slightly above the state and national figures.

B*K would characterize the demographics of the service areas as positive in relationship to an indoor facility with a fieldhouse focus.

Refer to Appendix A for the full data set.





PARTICIPATION

Market Potential Index for Adult Participation: In addition to examining the participation numbers for various outdoor activities through the National Sporting Goods Association, the 2020 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The information shown in Table P (right) illustrates participation rates for adults in outdoor activities.

This table indicates that the overall propensity for adults to participate in activities is greater than the national number of 100. In many cases, when a participation number is lower than the National number, this is due to a lack of facilities or an inability to pay for services and programs.

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sport activities.

Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. The data is collected in one year and the report is issued in June of the following year. This information provides the data necessary to overlay rate of participation onto the Immediate and Primary Area to determine market potential.

B*K takes the national average and combines that with participation percentages of the Primary Service Area based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage, when applied to the population of the Primary Service Area, then provides an idea of the market potential for outdoor recreation.

TABLE P - MARKET POTENTIAL INDEX (MPI) FOR PARTICIPATION IN ACTIVITIES IN IMMEDIATE SERVICE AREA

ADULTS PARTICIPATED IN:	ST. CHARLES	PRIMARY	SECONDARY
AEROBIC EXERCISE	100	106	101
BASEBALL	95	96	97
BASKETBALL	94	95	94
FOOTBALL	102	97	98
FRISBEE	111	100	103
GOLF	113	108	109
PILATES	97	102	98
PING PONG	109	101	102
SOCCER	94	86	85
SOFTBALL	91	93	96
TENNIS	103	105	101
VOLLEYBALL	99	93	96
WALKING FOR EXERCISE	103	104	104
YOGA	102	105	102
ZUMBA	108	101	103

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Service Area.
Percent of Population: Percent of the service area that participates in the activity.
MPI: Market potential index as compared to the national number of 100.

PARTICIPATION

Anticipated Participation Number: Utilizing the average percentage from Table-A plus the 2020 census information and census estimates for 2023 and 2028 (over age 7) the following comparisons are available.

TABLE A –PARTICIPATION RATES IN THE PRIMARY SERVICE AREA

ADULTS PARTICIPATED IN:	AGE	INCOME	REGION	NATION	AVERAGE
AEROBIC EXERCISE	15.7%	16.5%	20.6%	15.8%	17.2%
ARCHERY (TARGET)	1.7%	1.8%	3.0%	1.8%	2.1%
BASEBALL	3.6%	5.0%	2.8%	3.7%	3.8%
BASKETBALL	7.4%	7.8%	6.1%	7.6%	7.2%
BOXING	1.5%	1.4%	0.8%	1.5%	1.3%
CHEERLEADING	2.2%	1.5%	0.9%	1.0%	1.4%
EXERCISE WALKING	37.7%	40.4%	37.6%	37.3%	38.2%
FOOTBALL (FLAG)	1.8%	2.3%	1.6%	1.9%	1.9%
FOOTBALL (TOUCH)	2.6%	2.2%	2.9%	2.7%	2.6%
GOLF	6.5%	7.0%	9.3%	6.5%	7.3%
GYMNASTICS	1.7%	2.3%	1.4%	1.8%	1.8%
LACROSSE	0.8%	0.4%	0.3%	0.8%	0.6%
MARTIAL ARTS/MMA	1.7%	2.0%	1.0%	1.7%	1.6%
PICKLEBALL	2.1%	2.7%	3.4%	2.1%	2.6%
PILATES	2.0%	2.3%	1.2%	2.0%	1.9%
SOCCER	4.5%	5.2%	4.6%	4.6%	4.7%
SOFTBALL	3.0%	4.3%	3.6%	3.1%	3.5%
TABLE TENNIS/PING PONG	4.0%	5.1%	4.5%	4.1%	4.4%
TENNIS	4.6%	5.7%	3.1%	4.7%	4.5%
VOLLEYBALL	3.7%	4.7%	4.4%	3.8%	4.2%
WRESTLING	1.0%	0.9%	0.9%	1.0%	0.9%
YOGA	10.2%	10.8%	7.3%	10.4%	9.7%
DID NOT PARTICIPATE	20.8%	20.5%	21.5%	20.6%	20.9%

Age:	Participation based on individuals ages 7 & Up of the Service Area.
Income:	Participation based on the 2022 estimated median household income in the Service Area.
Region:	Participation based on regional statistics (West North Central).
National:	Participation based on national statistics.
Average:	Average of the four columns.

TABLE C –PARTICIPATION GROWTH/DECLINE FOR INDOOR ACTIVITIES IN THE PRIMARY SERVICE AREA

ADULTS PARTICIPATED IN:	AGE	INCOME	REGION	NATION	AVERAGE
AEROBIC EXERCISE	17.2%	223,483	227,117	227,841	4,358
ARCHERY (TARGET)	2.1%	27,181	27,623	27,711	530
BASEBALL	3.8%	49,048	49,846	50,005	957
BASKETBALL	7.2%	93,991	95,519	95,824	1,833
BOXING	1.3%	16,863	17,137	17,192	329
CHEERLEADING	1.4%	18,319	18,617	18,676	357
EXERCISE WALKING	38.2%	498,248	506,350	507,964	9,717
FOOTBALL (FLAG)	1.9%	24,778	25,181	25,261	483
FOOTBALL (TOUCH)	2.6%	33,810	34,360	34,470	659
GOLF	7.3%	95,529	97,083	97,392	1,863
GYMNASTICS	1.8%	23,441	23,822	23,898	457
LACROSSE	0.6%	7,467	7,588	7,613	146
MARTIAL ARTS/MMA	1.6%	20,741	21,079	21,146	404
PICKLEBALL	2.6%	33,477	34,021	34,130	653
PILATES	1.9%	24,498	24,896	24,975	478
SOCCER	4.7%	61,446	62,445	62,644	1,198
SOFTBALL	3.5%	45,533	46,273	46,421	888
TABLE TENNIS/PING PONG	4.4%	57,760	58,699	58,886	1,126
TENNIS	4.5%	58,842	59,799	59,990	1,148
VOLLEYBALL	4.2%	54,099	54,979	55,154	1,055
WRESTLING	0.9%	12,296	12,496	12,536	240
YOGA	9.7%	126,147	128,199	128,607	2,460
DID NOT PARTICIPATE	20.9%	263,515	267,801	268,654	5,139

PARTICIPATION BY ETHNICITY AND RACE:

Table H compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2022 survey, the following comparisons are possible.

TABLE H – COMPARISON OF NATIONAL, AFRICAN AMERICAN AND HISPANIC PARTICIPATION RATES

ADULTS PARTICIPATED IN:	PRIMARY SERVICE AREA	NATIONAL PARTICIPATION	AFRICAN AMERICAN PARTICIPATION	HISPANIC PARTICIPATION
AEROBIC EXERCISE	17.2%	15.8%	13.1%	17.8%
ARCHERY	2.1%	1.8%	0.4%	1.6%
BASEBALL	3.8%	3.7%	2.4%	4.8%
BASKETBALL	7.2%	7.6%	12.0%	9.4%
BOXING	1.3%	1.5%	3.7%	2.3%
CHEERLEADING	1.4%	1.0%	1.5%	1.1%
EXERCISE WALKING	38.2%	37.3%	24.4%	32.1%
FOOTBALL (FLAG)	1.9%	1.9%	3.4%	1.7%
FOOTBALL (TOUCH)	2.6%	2.7%	5.4%	2.8%
GOLF	7.3%	6.5%	2.2%	4.4%
GYMNASTICS	1.8%	1.8%	0.1%	1.0%
LACROSSE	0.6%	0.8%	1.2%	2.7%
MARTIAL ARTS/MMA	1.6%	1.7%	2.6%	2.1%
PICKLEBALL	2.6%	2.1%	1.0%	1.7%
PILATES	1.9%	2.0%	1.7%	2.3%
SOCCER	4.7%	4.6%	4.0%	7.2%
SOFTBALL	3.5%	3.1%	2.0%	2.9%
TABLE TENNIS/PING PONG	4.4%	4.1%	2.5%	3.6%
TENNIS	4.5%	4.7%	3.3%	4.7%
VOLLEYBALL	4.2%	3.8%	3.7%	4.6%
WRESTLING	0.9%	1.0%	1.6%	1.5%
YOGA	9.7%	10.4%	7.5%	10.3%
DID NOT PARTICIPATE	20.9%	20.6%	22.7%	19.8%

There is a significant Black population (23.5%) the Primary Service Area. As such, these numbers may play a factor with regards to overall participation.

NATIONAL SUMMARY OF SPORTS PARTICIPATION

The following chart summarizes participation for indoor activities (*) utilizing information from the 2021 National Sporting Goods Association survey.

TABLE A –PARTICIPATION RATES IN THE PRIMARY SERVICE AREA

SPORT	NAT'L RANK[1]	NAT'L PARTICIPATION (IN MILLIONS)
*EXERCISE WALKING	1	125.0
*CARDIO FITNESS	2	86.1
*STRENGTH TRAINING	3	68.9
*EXERCISING W/ EQUIPMENT	4	57.2
HIKING	5	48.8
*SWIMMING	6	47.2
*RUNNING/JOGGING	7	45.0
BICYCLE RIDING	8	42.8
*WEIGHT LIFTING	9	37.5
*YOGA	10	30.7
FISHING (FRESH WATER)	11	29.5
*WORKOUT @ CLUB	13	24.6
BASKETBALL	14	22.5
GOLF	16	19.0
*TARGET SHOOTING (LIVE AMMUNITION)	17	18.8
HUNTING W/ FIREARMS	18	16.4
BOATING (MOTOR/POWER)	19	14.6
*SOCCER	20	14.5
*TENNIS	22	13.8
KAYAKING	24	11.5
BASEBALL	26	11.3
*VOLLEYBALL	27	10.8
FISHING (SALT WATER)	29	9.6
SOFTBALL	30	9.3
FOOTBALL (TOUCH)	32	8.2
CANOEING	33	7.8
HUNTING W/ BOW & ARROW	34	6.9
FOOTBALL (TACKLE)	35	6.7
MOUNTAIN BIKING (OFF ROAD)	38	6.0
FOOTBALL (FLAG)	41	5.4
WATER SKIING	49	3.8
*PICKLEBALL	50	3.6

Nat'l Rank: Popularity of sport based on national survey.

[1] This rank is based upon the 58 activities reported on by NSGA in their 2021 survey instrument.

TRENDS

The following narrative highlights several trends with the types of facilities that B*K has been tasked with investigating as part of this study.

INDOOR MULTI-PURPOSE / FLEX SPACE

There are very few communities that B*K has, or is currently, working in that have an adequate amount of indoor, flexible, multi-purpose space. This flexible space can come in the form of gymnasiums, meeting rooms, halls, indoor turf, etc.

The reality is that much of this space was, at one time, supplied by partnerships with local school districts. While access to school district spaces has decreased, the demand for indoor flexible space has remained constant and, in many cases, increased. As such, municipal parks and recreation departments have become primary providers of these types of spaces to the community.

The benefit of these spaces is that they are less expensive to build, by comparison to other facility types, and less expensive to operate. And because of the scarcity of these spaces, users are willing to pay reasonable fees to use them.

INDOOR TURF

This facility type is regional. The further north one goes the greater the demand is for indoor turf. In a geographic area like St. Charles, indoor turf is beneficial. The turf provides an area for indoor practices during the winter months. By providing indoor turf area teams are less anxious to move outside, thus allowing natural grass fields to recover fully from the winter. Also, based on summer heat, the indoor turf areas provide an alternative place to train in the months of July and August.

It is important to keep in mind that when an agency installs indoor turf the surface, because it is indoors, lasts longer than its outdoor counterpart. Still, it is important to plan for replacement, depending on use, in the 10-15 year mark. This is also an amenity that groups are willing to pay market rates for and it is relatively inexpensive to operate this type of facility.

NAT'L PARTICIPATION

Population that participate in this sport on national survey.

National Participation by Age Group: Within the NSGA survey, participation is broken down by age groups. As such B*K can identify the top 3 age groups participating in the activities reflected in this report.

TABLE A –PARTICIPATION RATES IN THE PRIMARY SERVICE AREA

SPORT	NAT'L RANK[1]	NAT'L PARTICIPATION (IN MILLIONS)	
AEROBICS	35-44	25-34	45-54
BASEBALL	7-11	12-17	25-34
BASKETBALL	12-17	25-34	18-24
BOXING	25-34	18-24	35-44
CHEERLEADING	12-17	7-11	18-24
EXERCISE WALKING	55-64	65-74	45-54
FOOTBALL (FLAG)	7-11	12-17	25-34
FOOTBALL (TOUCH)	12-17	25-34	7-11
GOLF	55-64	64-74	45-54
GYMNASTICS	7-11	12-17	25-34
LACROSSE	12-17	7-11	18-24
MARTIAL ARTS MMA	7-11	25-34	12-17
PICKLEBALL	12-17	65-74	18-24
PILATES	25-34	35-44	45-54
SOCCER	7-11	12-17	25-34
SOFTBALL	12-17	7-11	25-34
TABLES TENNIS/PING PONG	25-34	18-24	12-17
TENNIS	25-34	35-44	12-17
VOLLEYBALL	12-17	25-34	18-24
WRESTLING	12-17	25-34	7-11
YOGA	25-34	35-44	45-54
DID NOT PARTICIPATE	45-54	55-64	65-74

Largest:	Age group with the highest rate of participation.
Second Largest:	Age group with the second highest rate of participation.
Third Largest:	Age group with the third highest rate of participation.

TRENDS CONT.

PROGRAMMING

There is a wide variety of programming that is possible with indoor multi-purpose flexible space and/or indoor artificial turf. The level and type of programming is only limited to the creativity of the staff and department. Many of the uses for this type of indoor space are athletic in nature.

Examples of the types of programming that could be accommodated include soccer, lacrosse, football, softball, baseball, wrestling, cheerleading, archery, roller derby, summer camps, specialty sport camps, cross-fit programming, group exercise, etc.

YOUTH SPORTS

There continues to be major growth in the youth sport market. Most parks and recreation departments find themselves in a position of offering introductory programming for youth sports. As participants get older and their level of sophistication and ability increases, many parks and recreation departments partner with local youth sports groups to offer a more competitive environment. As this progression happens the parks and recreation department transition from being the programmer, to the facility operator and facilitator of the program.

These programs can generate a significant amount of revenue both from a programmatic and rental perspective. In many cases if a parks and recreation department is developing a facility to accommodate youth sports, economic impact is considered. Both indoor and outdoor youth sports focused facilities can and do have a positive economic impact on the host community.

Because of the potential for economic impact of youth sports focused facilities, it is very much a modern-day arms race to see who can build the biggest and best facility. To that B*K frequently warns clients that if you plan to be in that market you will need to allocate budget resources so that you lead the market. Another factor is that use by local programs needs play a part in the overall business plan for the facility.

OPERATIONS

ASSUMPTIONS

The following highlights the assumptions that B*K has made in developing the operational plan. It is important to note that these assumptions have been vetted with the client and are based on their experience combined with that of B*K in operating similar facilities. As the project moves into a design phase it will be important to revisit the operational plan, as the final design and facility program could impact the operational costs.

- St. Charles Parks & Recreation would be responsible for programming and operating the facility.
- All programs are reflective of being run in-house. There will be opportunities in the future to offer some programs via contract instruction.
- The first full year of operation would be 2026 or later, operational figures are based on 2024 dollars.
- The presence of providers in the market would remain the same.
- The facility is not a membership-based facility and will have operating hours reflective of activities in the building.
- Specialty items in the building would be serviced on a contract basis. Those could include, but not be limited to (HVAC, hard court resurfacing, etc.)
- Property and liability insurance has been factored at $0.25 per square foot for 117,200 square feet.
- Utilities has been factored at $2.50 per square foot for 117,200 square feet.
- Bank charges have been factored at 3% of total revenue generation.
- Point of sales system has bene factored at 1% of total revenue generation.
- B*K has taken a conservative approach to the development of revenues. It is also important to note that programs are not factored at capacity.
- The expense model does not account for debt service, nor does it account for investment dividends.

PROPOSED HOURS OF OPERATION

SUMMER	
MONDAY-FRIDAY	6:00A-9:00P
SATURDAY	7:00A-3:00P
SUNDAY	10:00A-6:00P

SCHOOL YEAR	
MONDAY-FRIDAY	6:00-10:00A and 4:00-9:00P
SATURDAY	7:00A-3:00P
SUNDAY	10:00A-6:00P

STAFF MODEL

FULL-TIME STAFF MODEL

	SALARY	POSITIONS	TOTAL
BUILDING SUPERVISOR	85,000	1	85,000
SPORTS & COMPETITION COORDINATOR	75,000	1	75,000
MAINTENANCE/CUSTODIAL	70,000	2	140,000
RANGER	61,000	1	61,000
SUB-TOTAL		5	$361,000
BENEFITS		35%	$126,350
TOTAL			$487,350

The prescribed staffing model will accommodate the level of programming that is outlined in the operational plan. B*K would foresee a point where the facility may need to add a General Program position. However, the increase in those positions would be tied directly back to revenue generation.

It is also important to note that these are new positions dedicated to the operation of this facility. B*K would also suggest that existing programming staff could offer programs at this location.

PART-TIME STAFF MODEL

	SALARY	HOURS	WEEKS	TOTAL
FRONT DESK (SUM)	$14.00	121	14	23,716
FRONT DESK (SCH)	$14.00	80	36	40,320
BUILDING SUPERVISOR (SUM)	$18.00	54	14	13,608
BUILDING SUPERVISOR (SCH)	$18.00	61	36	39,528
SUB-TOTAL				$130,172
PROGRAM STAFF				73,380
SUB-TOTAL				$203,552
FICA			7.65%	15,572
TOTAL				$219,124

The Department may consider including some hourly custodial hours during weekend operations.

EXPENSE MODEL

The following expense model has been based on the best information available at the time of the study. Significant changes in the program or the market would necessitate the information be revisited and updated.

STAFFING	
FULL-TIME	487,350
PART-TIME	219,124
SUB-TOTAL	$706,474

COMMODITIES	
OFFICE SUPPLIES	1,500
MAINTENANCE/REPAIR/MAT.	2,500
JANITOR SUPPLIES	15,000
RECREATION SUPPLIES	5,000
UNIFORMS	2,000
PRINTING/POSTAGE	3,000
FOOD	2,000
OTHER MISC. EXPENSES	1,000
FUEL/MILEAGE	1,000
SUB-TOTAL	$33,000

CONTRACTUAL	
UTILITIES	293,300
WATER/SEWAR	5,000
INSURANCE	29,300
COMMUNICATIONS	5,000
CONTRACT SERVICES	50,000
RENTAL EQUIPMENT	5,000
ADVERTISING	15,000
BANK FEES (3%)	37,959
SOFTWARE FEES (1%)	12,653
TRAINING	2,500
CONFERENCE	2,000
DUES/SUBSCRIPTIONS	1,000
SUB-TOTAL	$458,412

IMPROVEMENT FUND	$125,000

STAFFING	706,474
COMMODITIES	33,000
CONTRACTUAL OBLIGATIONS	458,412
IMPROVEMENT FUND	125,000
TOTAL	**$1,382,780**

REVENUE MODEL

The following revenue model has been based on the best information available at the time of the study. Significant changes in the program or the market would necessitate the information be revisited and updated.

PROGRAMS	
VARIETY OF INDOOR	368,405
OTHER	
VENDING	1,500
BIRTHDAY RENTALS	60,000
LEASE	70,000
PRACTICE RENTALS	521,400
COMPETITION RENTALS	119,000
BUILDING NAMING RIGHTS	50,000
COURT NAMING	60,000
TURF NAMING	15,000
TOTAL	**$1,265,305**

The naming right figures are annual.

FULL FACILITY

The following is a 5-Year projection for the area. The 5-year projection includes the capital improvement fund.

OPTION #1	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
EXPENSES	$1,382,780	$1,410,436	$1,452,749	$1,496,331	$1,541,221
REVENUE	$1,265,305	$1,391,836	$1,461,427	$1,505,270	$1,550,428
	($117,475)	($18,600)	$8,678	$8,939	$9,207
PERCENTAGE W/ CAP	91.5%	98.7%	100.6%	100.6%	100.6%
IMPR. FUND (CUM.)[1]	$125,000	$250,000	$375,000	$500,000	$625,000

1 The capital improvement line is cumulative and illustrates the balance of that line item. It is called out in this chart but is factored into total expenses.

REVENUE DETAILS

Basketball Court Rentals: $198,000
- 44 Weeks
- 25 Hours/Week Available
- 6 Courts
- 6,000 Total Court Hours
- 60% Market Penetration
- $50 Hourly Rate/Court

Turf Rental: $323,400
- 44 Weeks
- 35 Hours/Week Available
- 1 Surface
- 1,540 Total Turf Hours Available
- 70% Market Penetration
- $300 Hourly Rate/Turf

Tournaments: $119,000
- 17 Tournament Days
- $3,500 Day Rate

Camp Programs: $205,625
- Winter
- Spring Break
- Summer (8 weeks)
- $175 Per Participant Fee

Leagues: $59,580
- Youth Basketball
- Youth Volleyball
- Adult Drop-In
- Pickleball Drop-In

Drop-In Participation: $37,200
- Winter Walking
- Indoor Playground
- Home School
- Drop-In GroupX

GroupX Pass ($75/month/person): $66,000
Birthday Parties ($200/party): $60,000

ECONOMIC & FISCAL IMPACTS

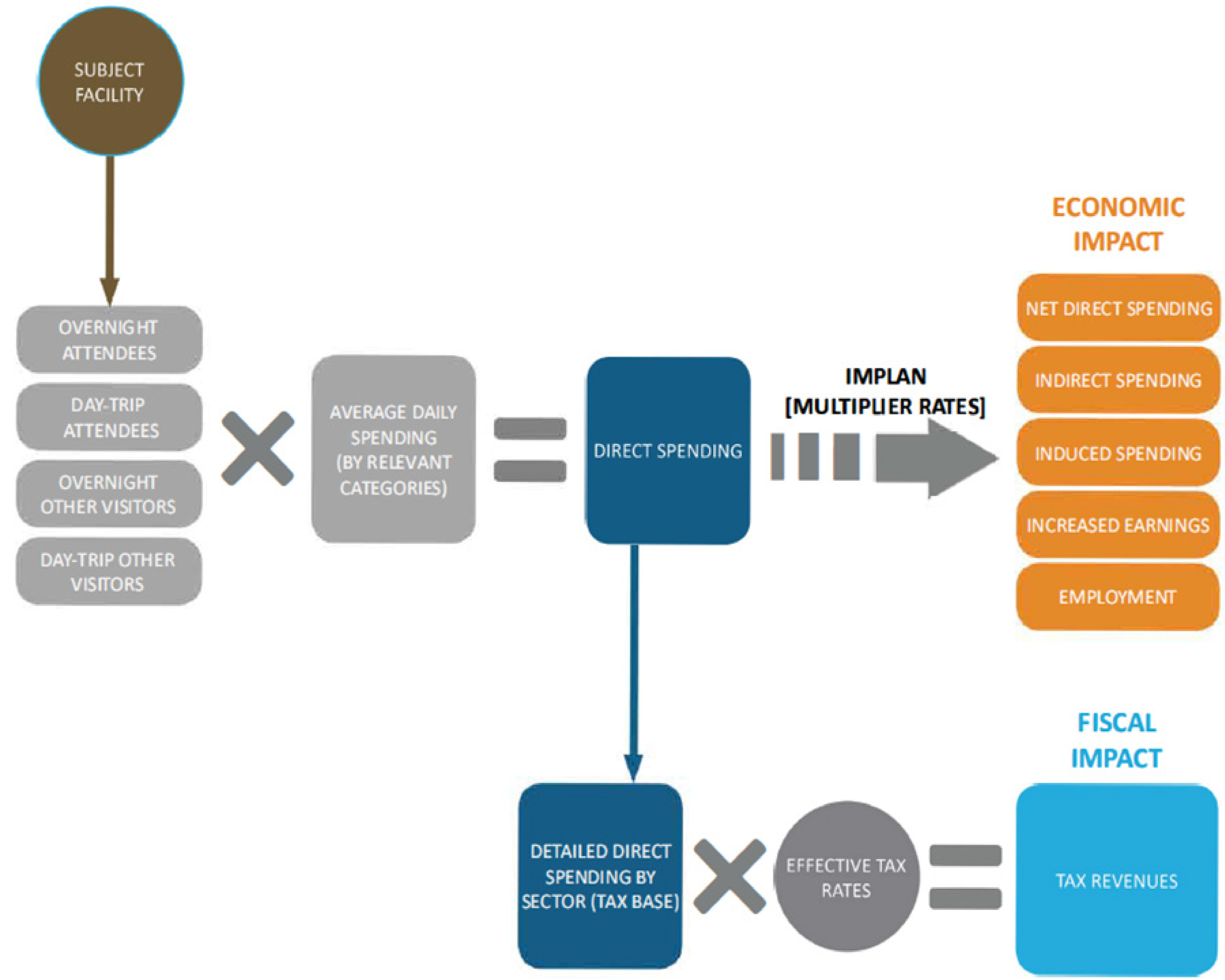
DEFINITIONS

Indirect spending, induced spending, increased earnings, and employment are estimated using a set of multiplier rates that are applied to the amount of direct spending. These figures are derived from an IMPLAN input-output model specifically purchased from IMPLAN Group, LLC. IMPLAN is a nationally recognized model commonly used to estimate economic impacts. An input-output model analyzes the commodities and income that normally flow through various sectors of the economy.

Economic Impact is defined as incremental new spending in an economy that is the direct result of certain activities, facilities, or events. The levels of impacts are defined as follows:

- Direct Spending – An expression of the spending that occurs as a direct result of the project being developed. For example, a visitor or participant's expenditures on hotel rooms, shopping and meals are direct spending.
- Employment – Measures the number of jobs supported in relation to the spending at the project. Employment impact is stated in the number of full-time equivalent jobs.

Fiscal Impact analysis measures the estimated tax revenues resulting from direct spending on certain activities, facilities, or events. For this analysis, fiscal impact estimates focus on major categories of tax revenues that are directly affected by a visitor's activity – general sales and use tax, transient occupancy (hotel/ motel) tax, and income tax.



DEMAND & UTILIZATION PROJECTIONS

Based on all of the observations, analysis, and conclusions in the preceding sections of this report, the proposed program is generally well-conceived and justifiable from a market perspective. St. Charles is well-located to attract regional demand that is not currently being met. Additionally, there is an undersupply of playing surfaces in the market, particularly hard surface courts.

To properly estimate potential demand and financials for the proposed program, Johnson Consulting relied on the operating and cost estimate projections developed by Ballard King in collaboration with BRS and the City of St. Charles Parks and Recreation Department. These projections for the operational budget as well as the proposed utilization were applied to the economic impact model developed by Johnson Consulting. In order to complete this task, we reviewed, researched, compared, and validated the existing demand and financial assumptions. These numbers were used as a base for Johnson Consulting's preliminary projections that are presented in this section. The business plan for the proposed venue currently has assumed 17 tournament weekend dates, that may vary by sports but primarily volleyball and basketball.

This information, in conjunction with the previous studies completed to date, was used to inform our assumptions for the proposed utilization as well as the corresponding revenue projections based upon the proposed program, and considering our market analysis of the local as well as regional demand.

Refer to Appendix C for full data set.

DIRECT SPENDING

The table below summarizes the estimated direct spending and annual sales resulting from the St. Charles Fieldhouse development. The spending and sales amounts correlate to the projected demand for the proposed facility at stabilization in Year 5.

As shown, the activity at the Fieldhouse is estimated to generate nearly 27,000 visitors on an annual basis, including players and spectators. Total spending at stabilization in Year 5 is estimated to be approximately $4.3 million, as a result of hotel stays, retail, dining, and other expenditures from visitors.

St. Charles Fieldhouse
Estimated Direct Spending by Tournament Visitors

		Assumptions	Year 5
	Visitation		
1	# of Tournaments		17
2	# of Teams per Tournament(avg)		45
3	# of Players per Team		10
4	# of Spectators per Team		25
5	**Total Visitors**		**26,775**
6	**# of Visitor-Days**	2.2 days of avrg stay	**58,905**
7	**# of Room Nights**		**5,738**
	Daily Spend		
8	Lodging	$30 / room night/person	$172,125
9	Meals and Incidentals	$25 / person-day	1,472,625
10	Retail	$20 / person-day	1,178,100
11	Fieldhouse Operations*		1,435,363
12	**Total Daily Spend**		**$4,258,213**

** BK projection operational expense in Year 5 stabilization*

Source: Jonhson Consulting

CONSTRUCTION IMPACT

Prior to the opening of the St. Charles Fieldhouse development, the construction of the project will result in a one-time economic and fiscal impact. The table at right shows those impact estimates.

As shown below, the estimated hard cost of development is approximately $53.7 million. Construction activity will result in 990 jobs, over $34.7 million in total spending, and $1.73 million in total fiscal impacts from Sales Tax. The project will also contribute 250 FTEs and $11.33 million in Increased Earnings.

St. Charles Fieldhouse
Estimated One-Time Construction Impact

	Multiplier or Tax Rate	Amount
Est. Hard Costs for Fieldhouse Complex		$53,724,000
Impact on Construction Jobs		
% of Costs Spent on Labor		55.0%
Labor Costs		$29,550,000
Average Construction Laborer Salary		$30,000
# of On-Site Construction Jobs		**990**
Economic Impact		
% of Costs Spent on Material		45.0%
Material Costs		$24,180,000
% Spent Locally		80.0%
Direct Construction Spending		$19,344,000
Indirect and Induced Spending	*0.80*	15,390,000
Total Spending		**$34,734,000**
Increased Earnings	*0.59*	$11,330,000
Employment (in FTE Jobs)	*12.9*	250
Fiscal Impact		
Sales Tax (State and Local)*	*8.950%*	$1,730,000
Total		**$1,730,000**

**Assuming that 10% of total spending goes to taxable corporate income of vendors.*
Source: Johnson Consulting

FINDINGS & RECOMMENDATIONS

CONCLUSION

The Fieldhouse and Hub master plan presents a comprehensive vision for a multi-functional recreational area centered around the Fieldhouse. With its diverse range of amenities, the site is poised to become a vibrant community hub, promoting health, wellness, and social interaction. The integration of natural features, such as the lake and waterfront areas, alongside structured recreational facilities, ensures a balanced and inviting environment for all visitors. The development will not only serve the local community but also attract tourists, boosting the local economy and fostering a sense of pride and engagement among residents. The combined offerings of the Fieldhouse and Hub promise continuous engagement and variety, ensuring visitors will keep returning for new experiences and lasting memories.

FINDINGS & RECOMMENDATIONS

This report was completed in the Summer of 2024 and concludes that the St. Charles market is strong enough to support a 117,200-square-foot Fieldhouse & HUB with a total project cost of $70.8 million. The project has the potential to add $4.3M annual impact to the local economy and provide an estimated $34.7M one-time construction economic impact to the St. Charles region. This portion of work is a vital component to the future of the ~97-acre park and will provide a catalyst for the future aspirations of the City if St. Charles. Future funding of this project and any future partnerships with key facility users are to be determined and factored into the long-term viability and ultimate arrangement of the project.

NEXT STEPS COULD INCLUDE:

1. The City of St. Charles will determine if and when there will be a capital partner for a portion of the building and the operating partners for portions of the Fieldhouse building and HUB. This momentum in the project will attract other willing partners.
2. Form a political action committee of dedicated citizens to educate interested parties, advocate for the project, and, through conversation and visioning, bring capital partners together in partnership agreements.
3. Once the partnerships are formed, the political action committee will inform the public to gain support for the project through social media, service club meetings, PTA meetings, Parks & Recreation Board, and City Council meetings, etc.
4. Partnering agencies will schedule and call for any bond elections to meet the capital needs.
5. Upon successful bond approval, hire the most qualified architect and engineering team to develop the design, create construction documents, and assist during construction.
6. Determine a method of construction procurement and hire the best-qualified contractor and partner to construct the project.
7. Market the project throughout the design and construction phase to build awareness and anticipation for the opening and pre-sell memberships.
8. Celebrate the opening of the HUB and Fieldhouse building.

APPENDIX

APPENDIX A
DEMOGRAPHICS

Demographic Analysis

Ballard*King & Associates (B*K) as part of a larger project team led by Barker Rinker Seacat (BRS) conducting a feasibility study on the St. Charles HUB project. The first step to complete this scope of work is to determine service areas for analysis and recreation/leisure activities.

The following is a summary of the demographic characteristics within areas identified as the Immediate, Primary, and Secondary Service Areas.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2020 Census data and their demographers for 2023-2028 projections. In addition to demographics, ESRI also provides data on housing, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

Service Areas: B*K identified the Immediate Service Area as the City of St. Charles proper. The Primary Service Area is a 30-minute drive time from the proposed location, with the Secondary Service Area being a 60-minute drive time.

Primary Service Area is defined as the distance people will travel on a regular basis (a minimum of once a week) to utilize recreation facilities. Use by individuals outside of this area will be much more limited and will focus more on special activities or events.

Service areas can flex or contract based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can influence participation, membership, daily admissions and the associated penetration rates for programs and services.

Service areas can vary in size with the types of components in the facility.

Demographic Summary

	City of St. Charles	Primary Service Area[1]	Secondary Service Area[2]
Population:			
2020 Census	70,501	1,428,443	2,690,417
2023 Estimate	73,325	1,433,596	2,693,518
2028 Estimate	75,896	1,437,557	2,692,317
Households:			
2020 Census	29,867	591,430	1,098,137
2023 Estimate	31,243	597,362	1,106,866
2028 Estimate	32,652	605,673	1,119,093
Families:			
2020 Census	17,438	361,725	685,204
2023 Estimate	18,106	365,198	698,886
2028 Estimate	18,831	368,958	704,612
Average Household Size:			
2020 Census	2.24	2.36	2.40
2023 Estimate	2.24	2.34	2.39
2028 Estimate	2.22	2.32	2.36
Ethnicity (2022 Estimate):			
Hispanic	6.1%	4.2%	4.1%
White	78.9%	62.0%	69.8%
Black	7.6%	25.3%	18.5%
American Indian	0.3%	0.3%	0.3%
Asian	3.2%	4.4%	3.2%
Pacific Islander	0.1%	0.04%	0.04%
Other	2.9%	1.8%	1.7%
Multiple	7.1%	6.2%	6.5%
Median Age:			
2020 Census	36.6	37.8	37.9
2023 Estimate	39.8	40.1	40.1
2028 Estimate	40.7	41.1	41.1
Median Income:			
2023 Estimate	$77,449	$75,460	$73,479
2028 Estimate	$86,767	$86,015	$83,256

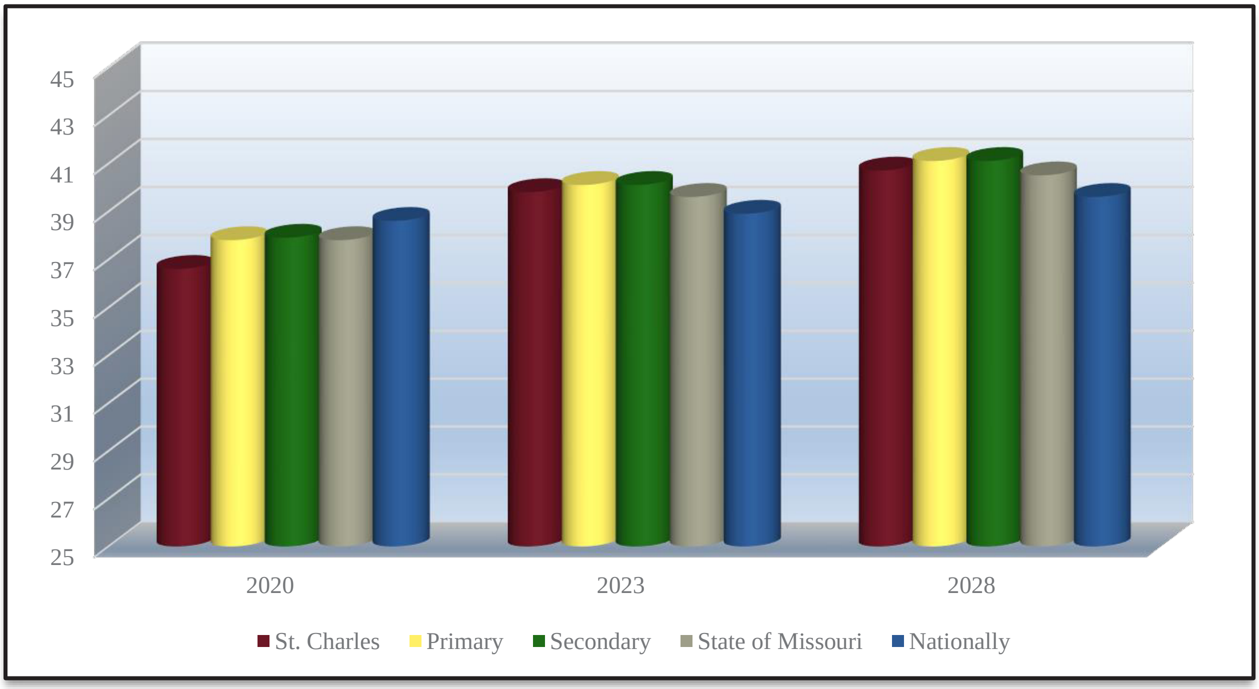
[1] 30-Minute Drive Time from proposed site.
[2] 60-Minute Drive Time from proposed site.

Age and Income: The median age and household income levels are compared with the national number as both factors are secondary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

Table A – Median Age:

	2020 Census	2023 Projection	2028 Projection
City of St. Charles	36.6	39.8	40.7
Primary Service Area	37.8	40.1	41.1
Secondary Service Area	37.9	40.1	41.1
State of Missouri	37.8	39.6	40.5
Nationally	38.6	38.9	39.6

Chart A – Median Age:



The median age in the Immediate Service Area is slightly lower than the State of Missouri and the National number. A lower median age typically points to the presence of families with children. Parks and recreation activities, programs and events draw a large demographic but tend to be most popular with youth and their parents. Grandparents are becoming an increasing part of the household though, as they care for and are involved with their grandchildren.

The following chart provides the number of households and percentage of households in the I Service Areas with children.

Table B – Households w/ Children

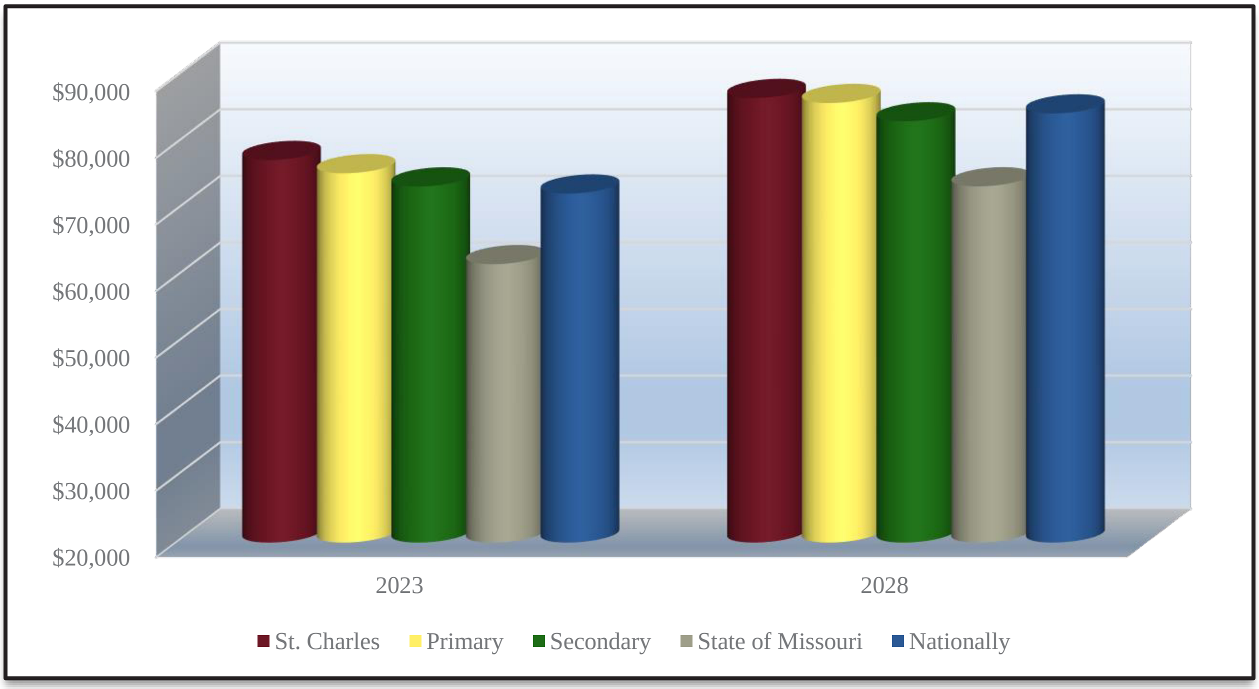
	Number of Households w/ Children	Percentage of Households w/ Children
City of St. Charles	7,051	23.9%
Primary Service Area	169,341	28.7%
Secondary Service Area	317,776	29.3%
State of Missouri	710,415	29.2%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2020 Census, 30.6% of households nationally had children present.

Table C – Median Household Income:

	2023 Projection	2028 Projection
City of St. Charles	$77,449	$86,767
Primary Service Area	$75,460	$86,015
Secondary Service Area	$73,479	$83,256
State of Missouri	$61,811	$73,496
Nationally	$72,414	$84,445

Chart C (1) – Median Household Income:



Based on 2022 projections for median household income the following narrative describes the service area:

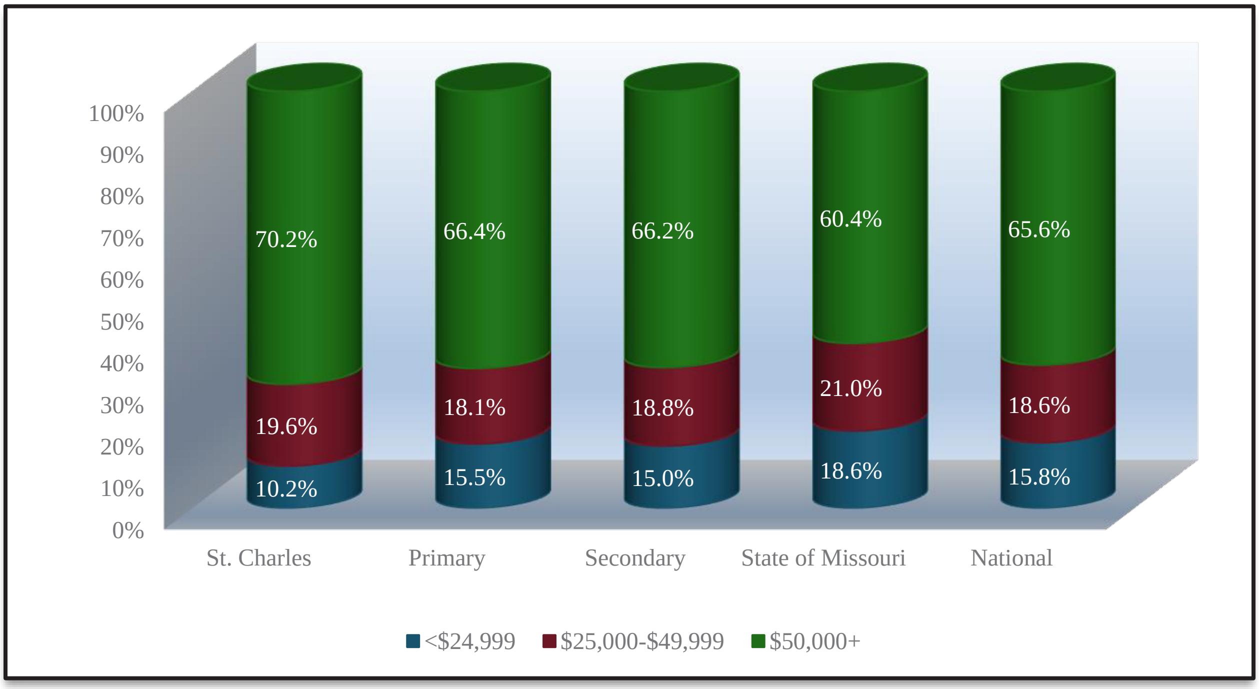
In the City of St. Charles, the percentage of households with median income over $50,000 per year is 70.2% compared to 61.6% on a national level. Furthermore, the percentage of households in the service area with median income less than $25,000 per year is 10.2% compared to a level of 18.0% nationally.

In the Primary Service Area, the percentage of households with median income over $50,000 per year is 66.4% compared to 61.6% on a national level. Furthermore, the percentage of households in the service area with median income less than $25,000 per year is 15.5% compared to a level of 18.0% nationally.

In the Secondary Service Area, the percentage of households with median income over $50,000 per year is 66.2% compared to 61.6% on a national level. Furthermore, the percentage of households in the service area with median income less than $25,000 per year is 15.0% compared to a level of 18.0% nationally.

While there is no perfect indicator of use of a fieldhouse facility, the percentage of households with more than $50,000 median income is a key indicator. Therefore, those numbers are significant and balanced with the overall cost of living.

Chart C (2) – Median Household Income Distribution



In addition to looking at the Median Age and Median Income, it is important to examine Household Budget Expenditures. Reviewing housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

Table D – Household Budget Expenditures[3]:

Immediate Service Area	SPI	Average Amount Spent	Percent
Housing	100	$30,471.39	33.1%
Shelter	100	$24,664.23	26.8%
Utilities, Fuel, Public Service	100	$5,807.16	6.3%
Entertainment & Recreation	100	$3,768.79	4.1%

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	106	$32,270.13	33.2%
Shelter	106	$26,154.92	26.9%
Utilities, Fuel, Public Service	105	$6,115.21	6.3%
Entertainment & Recreation	105	$3,963.98	4.1%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	99	$30,161.75	33.0%
Shelter	98	$24,365.91	26.7%
Utilities, Fuel, Public Service	100	$5,795.84	6.3%
Entertainment & Recreation	99	$3,757.94	4.1%

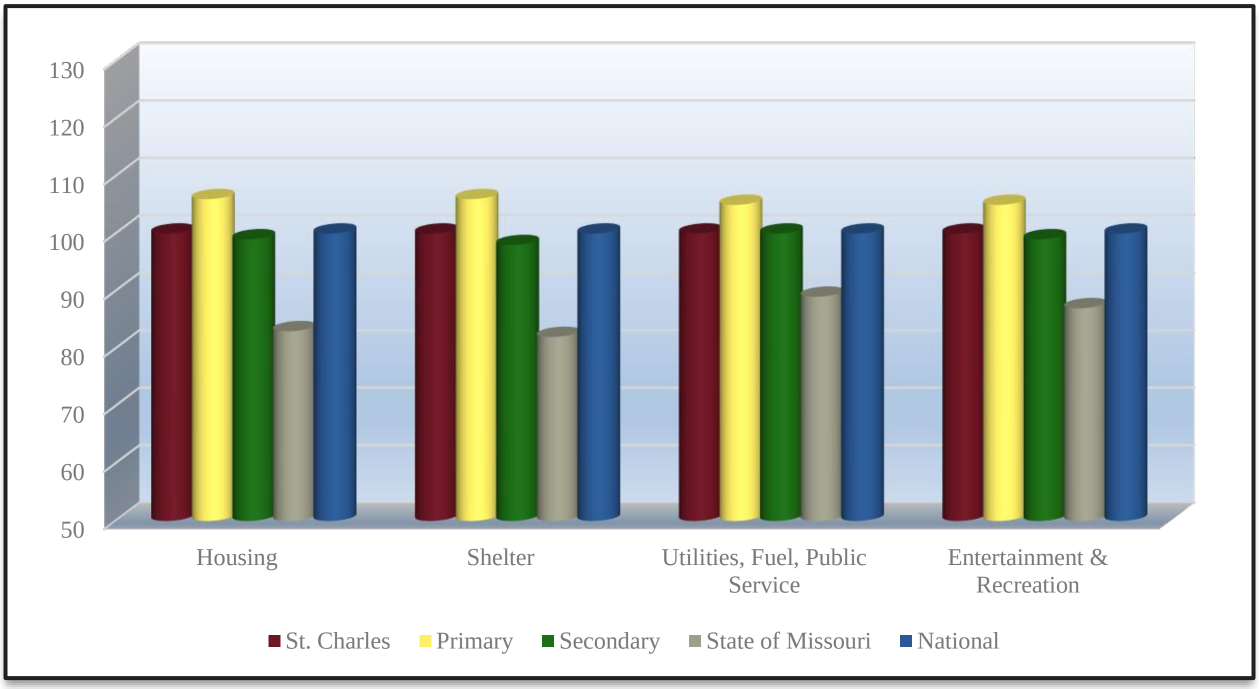
State of Missouri	SPI	Average Amount Spent	Percent
Housing	83	$23,682.22	31.1%
Shelter	82	$18,671.08	24.5%
Utilities, Fuel, Public Service	89	$5,011.14	6.6%
Entertainment & Recreation	87	$3,200.06	4.2%

SPI: Spending Potential Index as compared to the National number of 100.
Average Amount Spent: The average amount spent per household.
Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

[3] Consumer Spending data are derived from the 2019 and 2021 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2023 and 2028.

Chart D – Household Budget Expenditures Spending Potential Index:



The consistency between the median household income and the household budget expenditures is important. It also points to the fact that compared to a National level the dollars available, the money being spent in the Immediate Service Area is higher. This could point to the ability to pay for programs and services offered at a recreation facility of any variety.

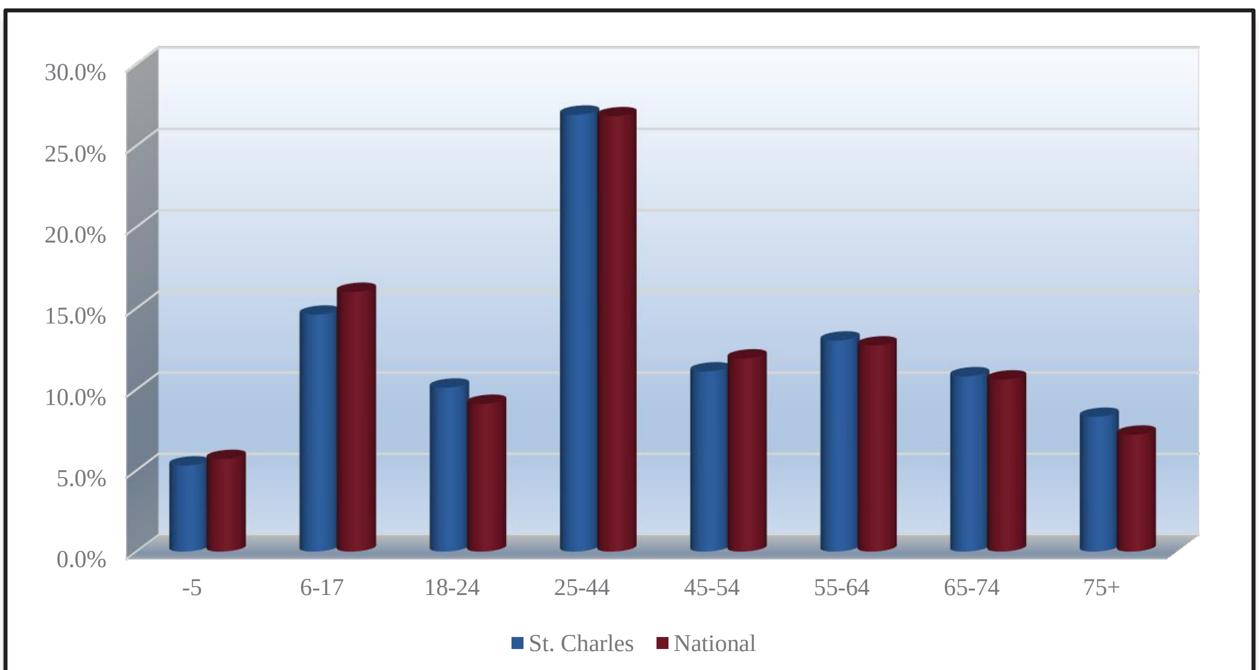
Population Distribution by Age: Utilizing census information for the City of St. Charles, the following comparisons are possible.

<u>Table E – 2023 City of St. Charles Distribution</u>
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	3,875	5.3%	5.7%	-0.4%
5-17	10,692	14.6%	16.0%	-1.4%
18-24	7,396	10.1%	9.1%	+1.0%
25-44	19,724	26.9%	26.8%	+0.1%
45-54	8,123	11.1%	11.9%	-0.8%
55-64	9,564	13.0%	12.7%	+0.3%
65-74	7,896	10.8%	10.6%	+0.2%
75+	6,055	8.3%	7.2%	+1.1%

Population: 2023 census estimates in the different age groups in the Immediate Service Area.
% of Total: Percentage of the Immediate Service Area population in the age group.
National Population: Percentage of the national population in the age group.
Difference: Percentage difference between the Immediate Service Area population and the national population.

<u>Chart E – 2023 City of St. Charles Age Group Distribution</u>



The demographic makeup of the City of St. Chalres, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the age groups under 5, 5-17 and 45-54 age groups. The greatest positive variance is in the 18-24 age group with +1.0%, while the greatest negative variance is in the 5-17 age group with -1.4%.

Population Distribution Comparison by Age: Utilizing census information from the City of St. Charles, the following comparisons are possible.

Table F – 2023 City of St. Charles Population Estimates
(U.S. Census Information and ESRI)

Ages	2020 Census	2023 Projection	2028 Projection	Percent Change	Percent Change Nat'l
-5	4,209	3,875	4,037	-4.1%	-9.1%
5-17	9,664	10,692	11,152	+15.4%	-8.2%
18-24	9,623	7,396	7,871	-18.2%	-7.7%
25-44	18,414	19,724	19,592	+6.4%	+3.6%
45-54	10,342	8,123	8,742	-15.5%	-16.5%
55-64	8,291	9,564	8,650	+4.3%	+1.7%
65-74	5,076	7,896	8,732	+72.0%	+61.3%
75+	4,865	6,055	7,120	+46.4%	+51.1%

Chart F – City of St. Charles Population Growth

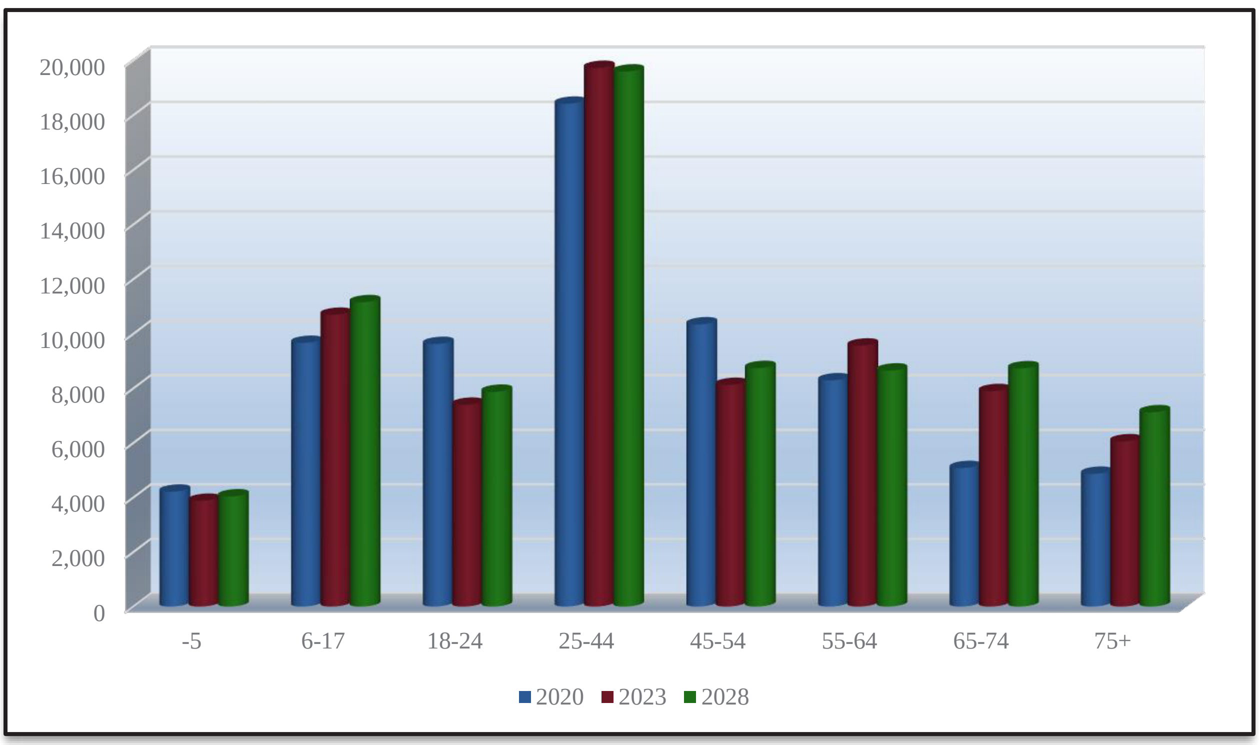


Table-H illustrates the growth or decline in age group numbers from the 2020 census until the year 2028. It is projected that the age categories -5, 18-24, and 45-54 will see a decrease in population with all others an increase. The population of the United States is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the City of St. Charles for 2023 population projections. Those numbers were developed from 2020 Census Data.

Table G – City of St. Charles Ethnic Population and Median Age 2023
(Source – U.S. Census Bureau and ESRI)

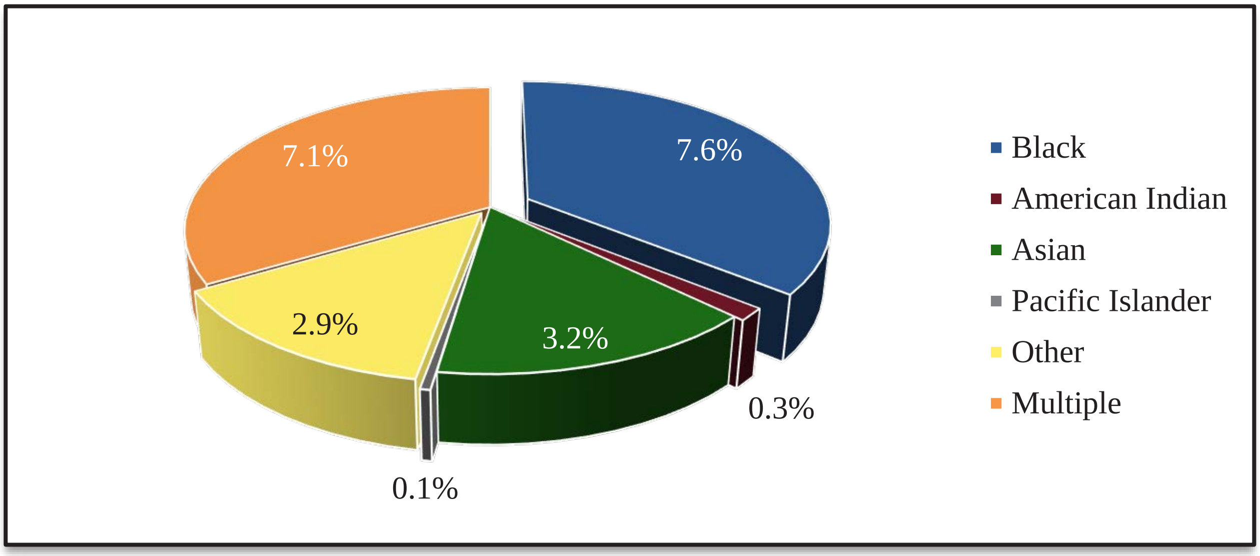
Ethnicity	Total Population	Median Age	% of Population	% of MO Population
Hispanic	4,453	25.1	6.1%	5.0%

Table H – City of St. Charles by Race and Median Age 2023
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MO Population
White	57,864	43.7	78.9%	76.6%
Black	5,539	32.4	7.6%	11.4%
American Indian	193	37.7	0.3%	0.5%
Asian	2,348	35.5	3.2%	2.2%
Pacific Islander	43	27.5	0.1%	0.2%
Other	2,113	24.6	2.9%	2.1%
Multiple	5,225	19.3	7.1%	7.0%

2023 City of St. Charles Total Population: 73,325 Residents

Chart H – 2022 City of St. Charles Population by Non-White Race



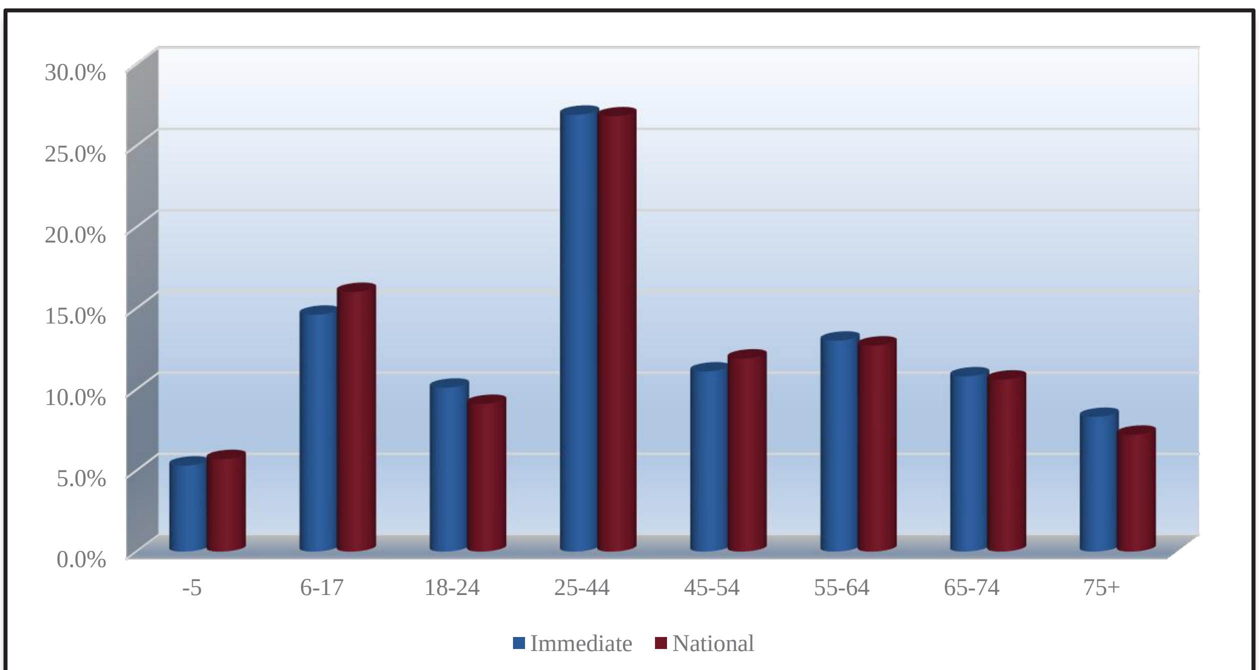
Population Distribution by Age: Utilizing census information for the Primary Service Area, the following comparisons are possible.

Table I – 2023 Primary Service Area Age Distribution
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	76,176	5.3%	5.7%	-0.4%
5-17	226,999	15.8%	16.0%	-0.2%
18-24	124,396	8.7%	9.1%	-0.4%
25-44	378,074	26.4%	26.8%	-0.4%
45-54	167,623	11.7%	11.9%	-0.2%
55-64	191,414	13.4%	12.7%	+0.7%
65-74	155,290	10.8%	10.6%	+0.2%
75+	113,622	7.9%	7.2%	+0.7%

Population: 2023 census estimates in the different age groups in the Primary Service Area.
% of Total: Percentage of the Primary Service Area population in the age group.
National Population: Percentage of the national population in the age group.
Difference: Percentage difference between the Primary Service Area population and the national population.

Chart I – 2023 Primary Service Area Age Group Distribution



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the age groups under 5, 5-17, 18-24, 25-44 and 45-54 age groups. The greatest positive variance is in the 55-64 and 75+ age groups with +1.7%, while the greatest negative variance is in the -5, 18-24, and 25-44 age groups with -0.4%.

Population Distribution Comparison by Age: Utilizing census information from the Primary Service Area, the following comparisons are possible.

Table J – 2023 Primary Service Area Population Estimates
(U.S. Census Information and ESRI)

Ages	2020 Census	2023 Projection	2028 Projection	Percent Change	Percent Change Nat'l
-5	88,706	76,176	76,807	-13.4%	-9.1%
5-17	249,690	226,999	220,197	-11.8%	-8.2%
18-24	136,560	124,396	121,481	-11.0%	-7.7%
25-44	369,109	378,074	375,252	+1.7%	+3.6%
45-54	216,124	167,623	170,197	-21.3%	-16.5%
55-64	173,984	191,414	170,701	-1.9%	+1.7%
65-74	99,420	155,290	165,218	+66.2%	+61.3%
75+	94,848	113,622	137,704	+45.2%	+51.1%

Chart J – Primary Service Area Population Growth

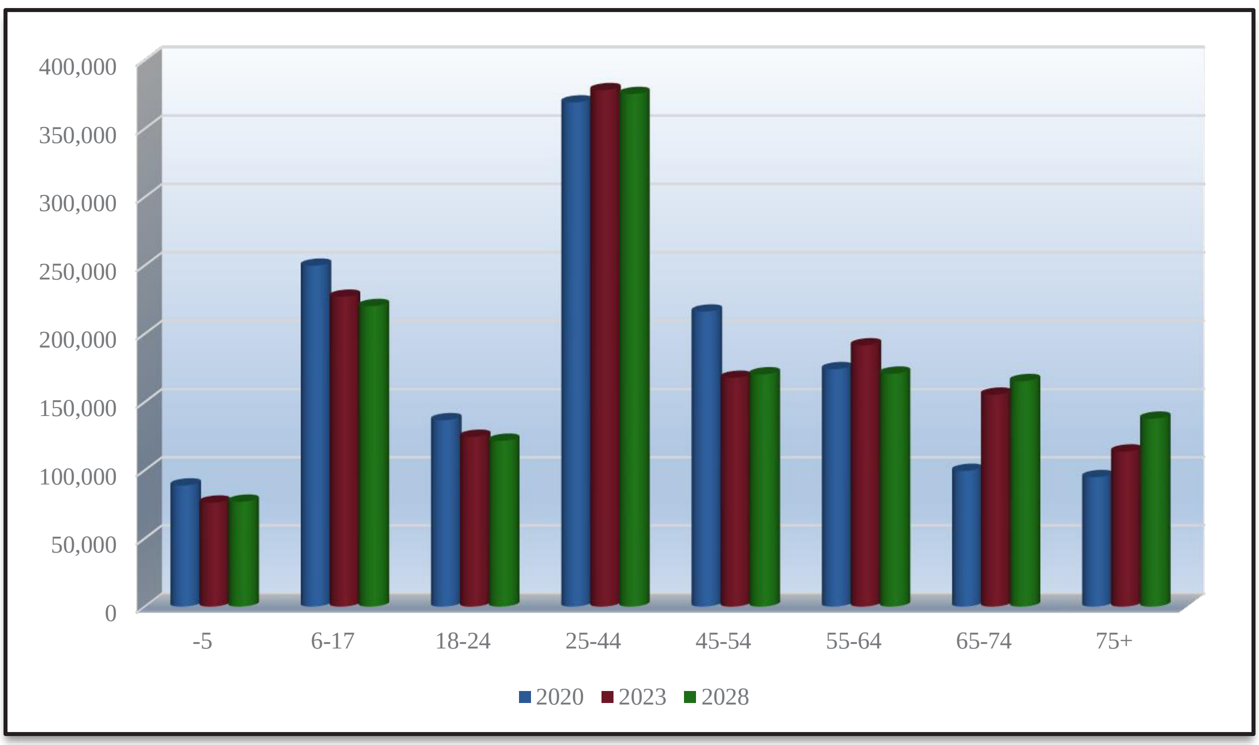


Table-H illustrates the growth or decline in age group numbers from the 2020 census until the year 2028. It is projected that the age categories 25-44, 65-74 and 75+ will see an increase in population with all others a decrease. The population of the United States is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the Primary Service Area for 2023 population projections. Those numbers were developed from 2020 Census Data.

Table K – Primary Service Area Ethnic Population and Median Age 2023
(Source – U.S. Census Bureau and ESRI)

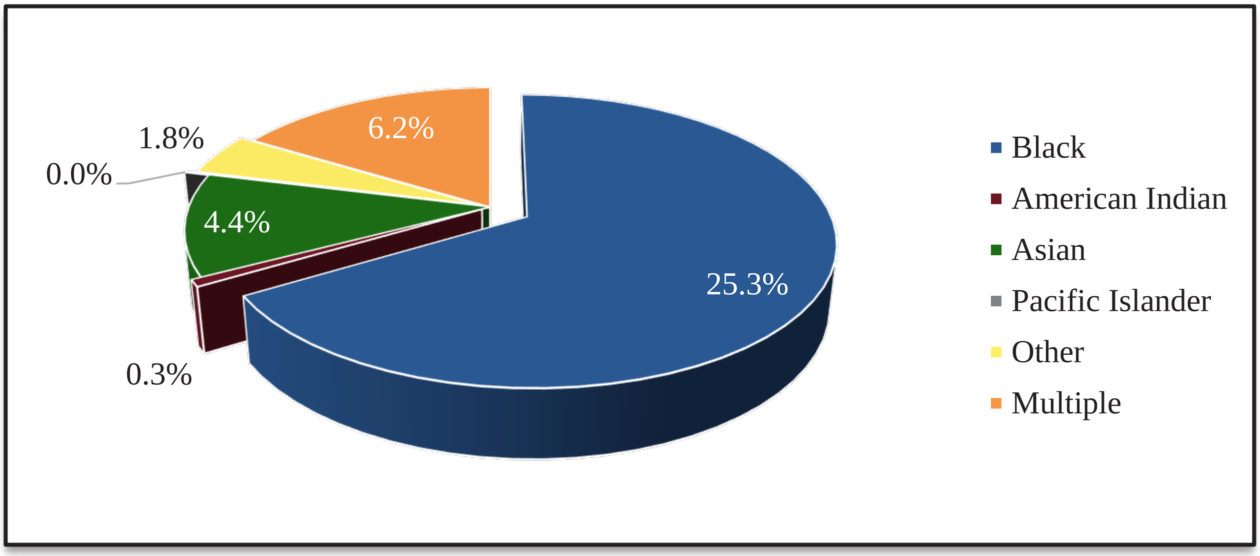
Ethnicity	Total Population	Median Age	% of Population	% of MO Population
Hispanic	60,271	29.2	4.2%	5.0%

Table L – Primary Service Area by Race and Median Age 2023
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MO Population
White	888,749	44.6	62.0%	76.6%
Black	362,926	36.3	25.3%	11.4%
American Indian	3,632	42.0	0.3%	0.5%
Asian	63,112	34.6	4.4%	2.2%
Pacific Islander	599	38.2	0.04%	0.2%
Other	26,133	30.2	1.8%	2.1%
Multiple	88,455	22.4	6.2%	7.0%

2023 Primary Service Area Total Population: 1,433,596 Residents

Chart L – 2022 Primary Service Area Population by Non-White Race



APPENDIX B
SURVEY RESULTS

BALLARD*KING & ASSOCIATES LTD
Recreation Planning and Operations Consultants

Findings – Full Data Set

As part of the HUB feasibility and master plan study, the project team completed an online survey. The survey was developed by the consulting team and vetted with Parks & Recreation Staff. The survey was developed and distributed using the SurveyMonkey platform. There was a total of 1,030 responses received.

Summary:

- 85.1% of respondents indicated that they were a resident of the City of St. Charles, with 90.1% of respondents being St. Charles County residents.

- 90.6% of respondents indicated that they, or members of their household, use City of St. Charles Parks & Recreation facilities on a regular basis. Facebook (36.6%), Parks & Recreation Website (29.1%), and Printed PLAY Brochure (15.5%) were the primary methods used to get information about City of St. Charles Parks & Recreation Department programs and facilities.

- When respondents were asked, 53.8% indicated that they, or members of their household, travel outside of St. Charles County to participate in indoor practices or competitions.

- For those that do travel outside of the County, they were asked how far they do travel with 49.2% indicated less than 30 minutes and 45.1% indicated 30-60 minutes.

- The top three activities that individuals or members of their household travel for are Soccer (203), Basketball (168), and Volleyball (140).

- Respondents were given seven different facility options and asked to indicate how important each of the areas are to them or members of their household. Weighted averages are as follows:

    - 6.39 Indoor Track
    - 5.90 Full-Sized Soccer Field
    - 5.52 Medium Turf Field
    - 5.41 4 Basketball Court Gymnasium
    - 5.37 Small Turf Field
    - 5.30 2 Basketball Court Gymnasium
    - 4.67 8 Basketball Court Gymnasium

  When respondents were asked to indicate the component that was most important, they indicated Indoor Track (28.4%), 4 Basketball Court Gymnasium (16.4%), and 8 Basketball Court Gymnasium (16.3%).

- Respondents were asked to rate the importance of "other" types of amenities that could be included in an indoor facility. Weighted averages are as follows:

  - 8.98 Restrooms
  - 7.35 Adjacent Outdoor Green Space
  - 6.63 Concessions
  - 6.14 Vending
  - 5.79 Locker Rooms
  - 4.80 Officials Changing Areas
  - 4.71 Meeting Rooms & Large Lobby & Entry Space
  - 4.53 Team Room(s)

- When asked what programs individuals or members of their household would participate in a turf area soccer (449), Golf Hitting Stalls (413), and Kick Ball (344) were the top three activities.

- When asked what programs individuals or members of their household would participate in using an indoor court surface, Pickleball (423), Basketball (418), and Volleyball (412) were the top three activities.

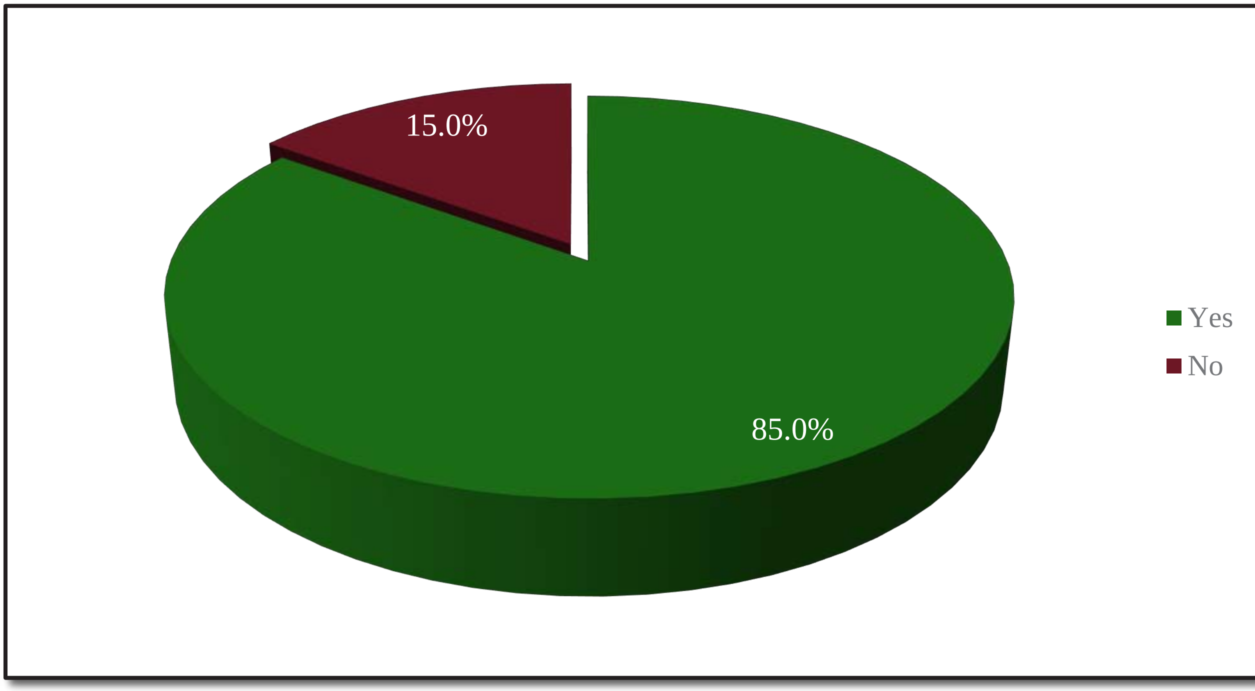
- When asked what activities individuals or members of their household would participate in at the HUB, Food Truck Area/Event Plaza (667), Water Activity Rental (626), and Outdoor Bar & Grill (530) were the top three activities.

- 77.6% of respondents indicated that it was very to extremely important that the proposed facility have a positive economic impact on the community.

- 65.7% of respondents indicated that it was very to extremely important that the proposed facility maximize revenue generation to minimize, or eliminate, any tax subsidy to the annual operation of the facility.

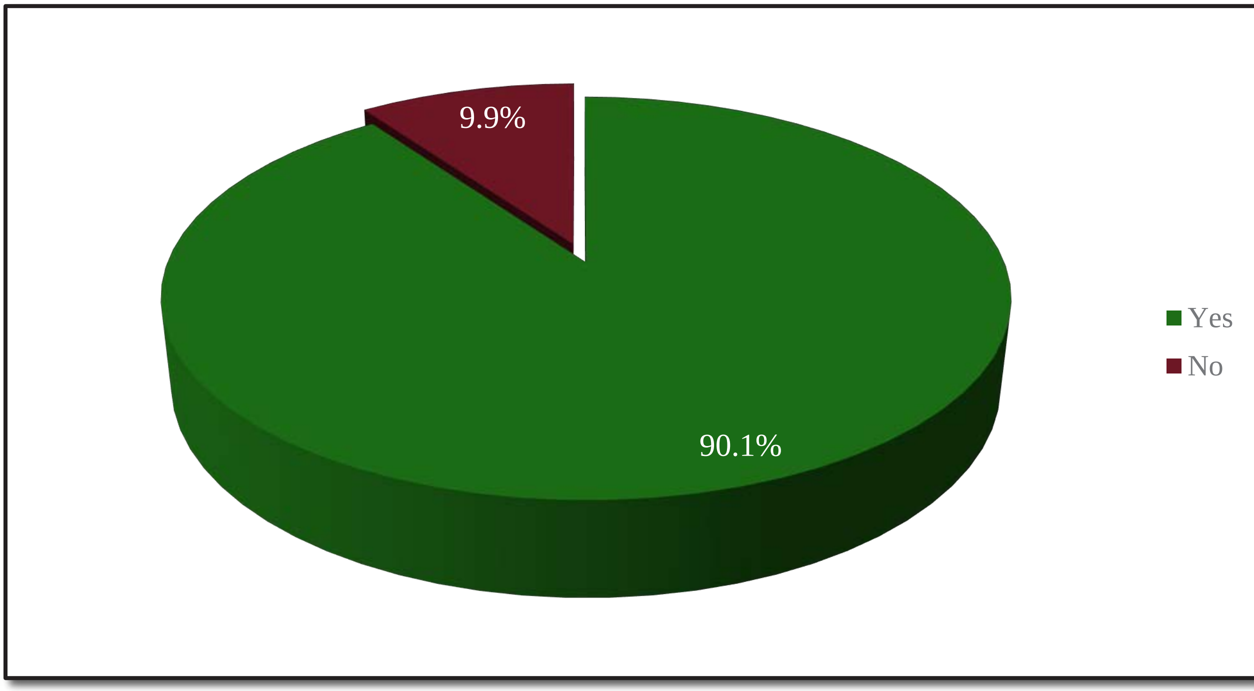
- 53.3% of respondents would be somewhat to very supportive of a tax increase that would fund the construction and capital improvement of a fieldhouse-like facility.

Question #1 – Are you a resident of the City of St. Charles? (Resident defined as receiving a water bill from the City.)



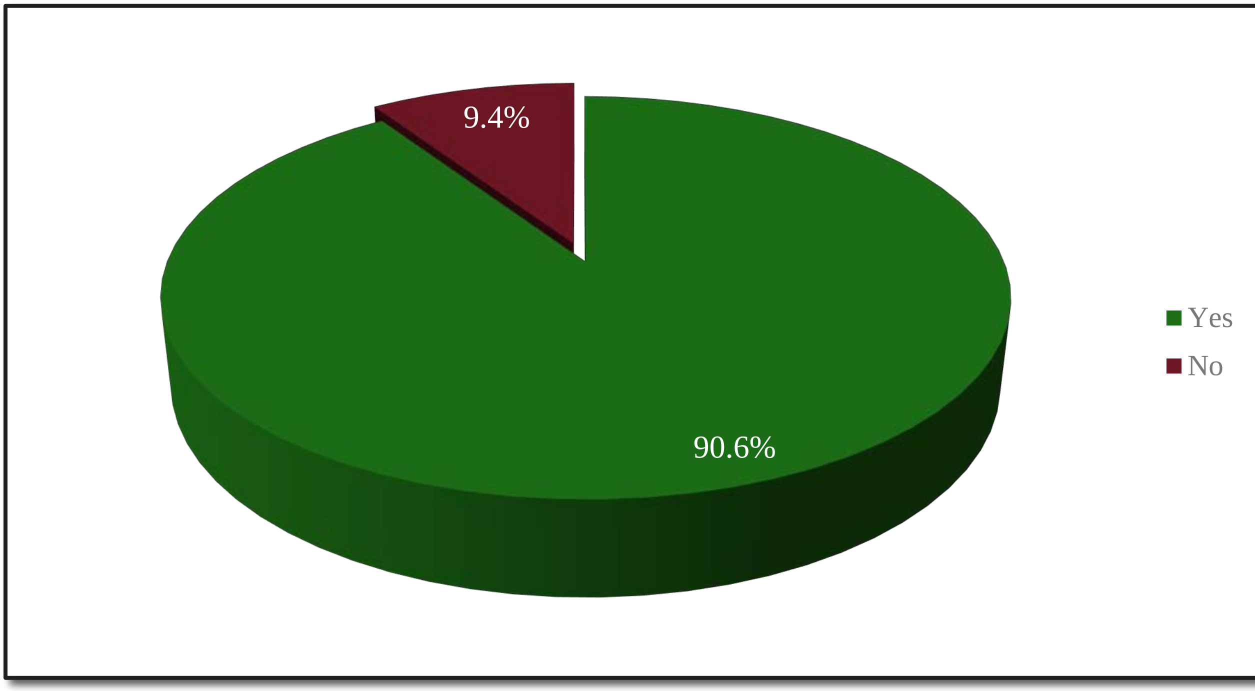
Options	Responses
Yes	876
No	154
Skipped	0

Question #2 – Are you a St. Charles County resident?



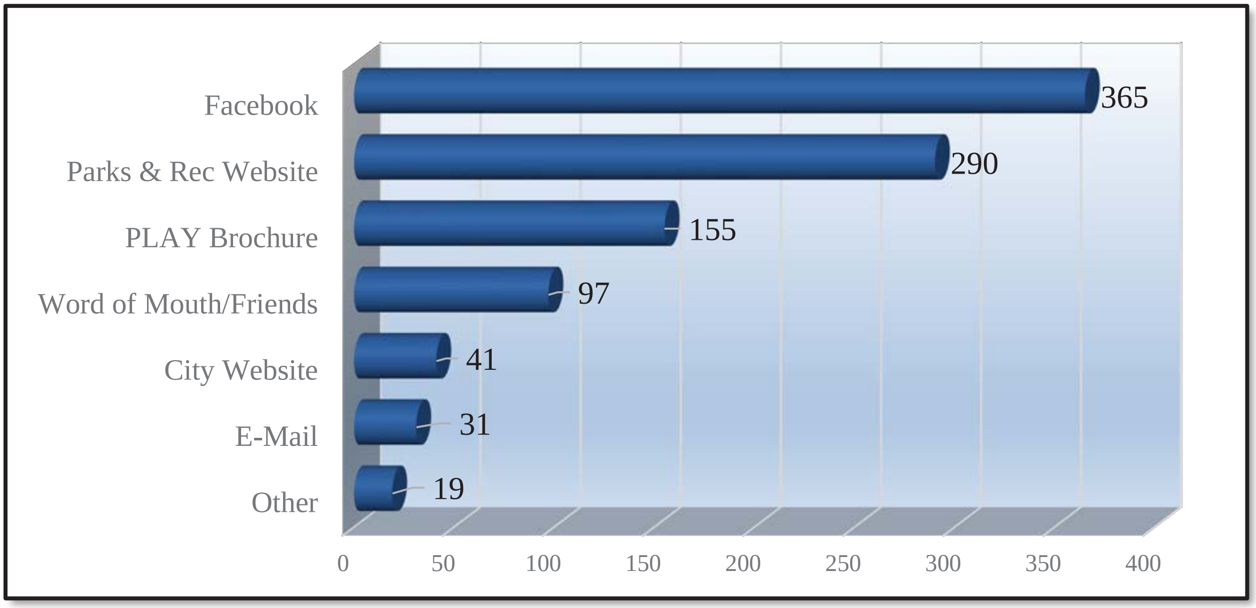
Options	Responses
Yes	916
No	101
Skipped	13

Question #3 – Do you or members of your household use City of St. Charles Parks & Recreation facilities on a regular basis? (regular defined as using at least once a season)

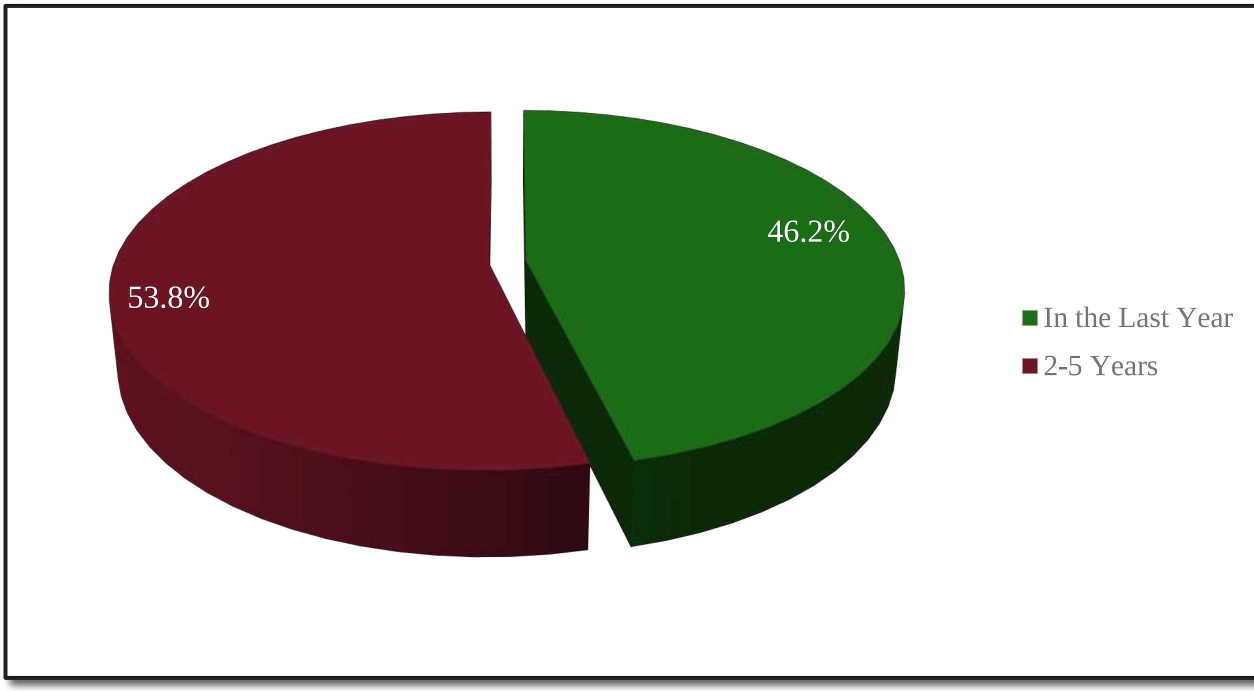


Options	Responses
Yes	904
No	94
Skipped	32

Question #4 – What is the primary mechanism you and members of your household use to get information about City of St. Charles Parks & Recreation Department programs and facilities?



Question #5 – Do you or members of your household travel outside of St. Charles County to participate in indoor practices or competitions?

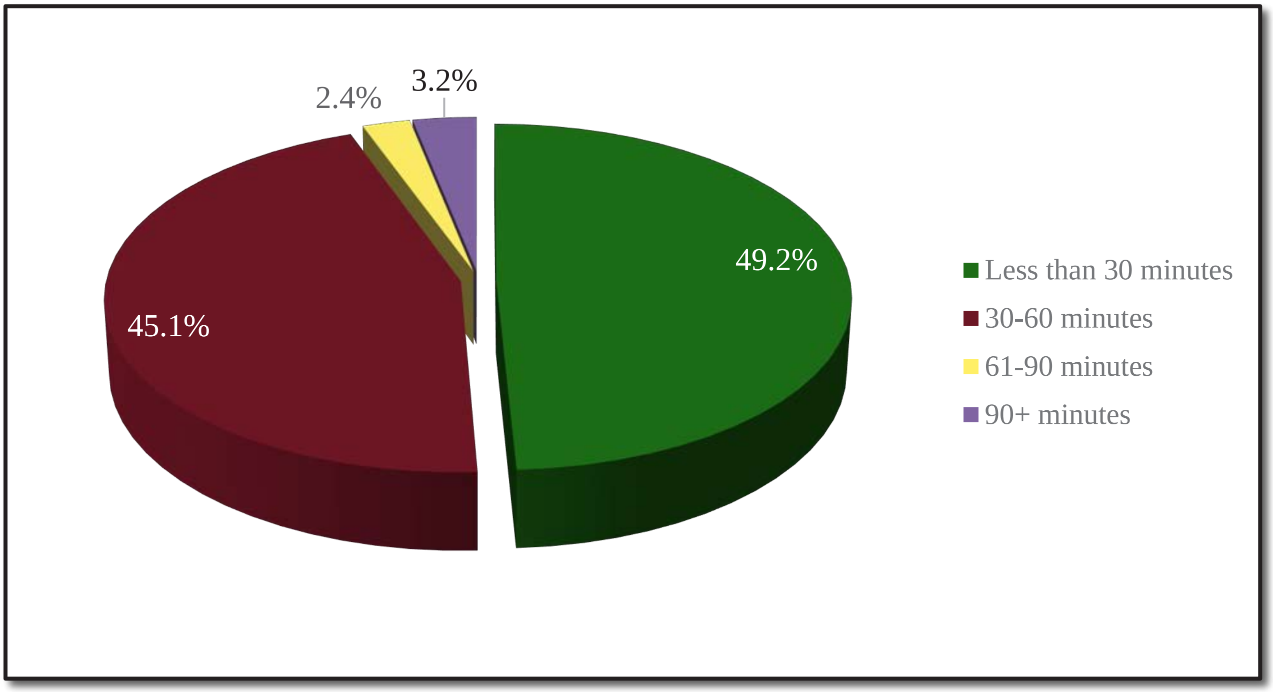


Options	Responses
Yes	462
No	537
Skipped	31

B*K Comments:

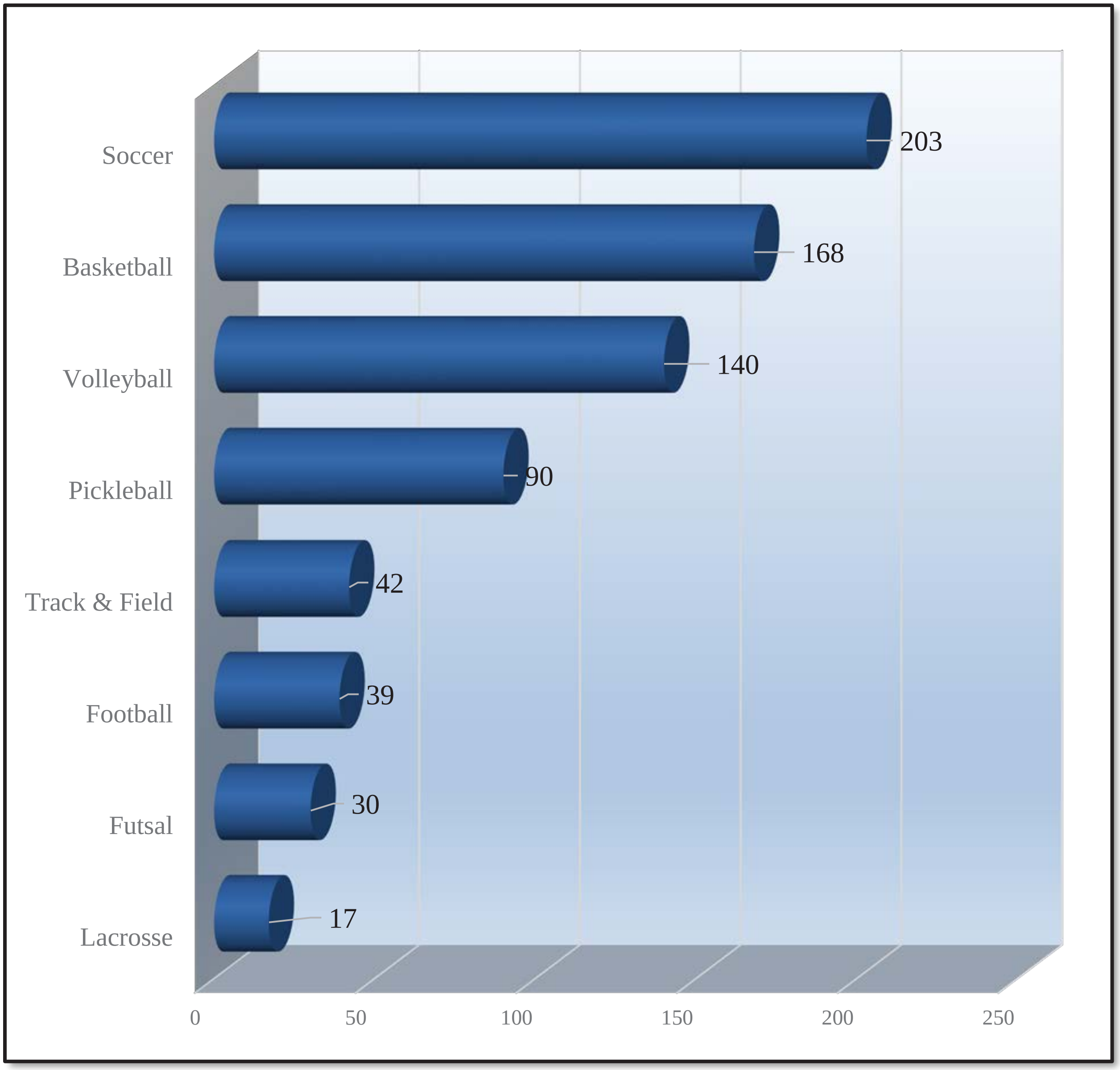
This illustrates strong usage of the park and when you combined that with the level of importance received from question #2, it points to a worthwhile, long-term investment, for the City.

Question #6 – How far, on average, do you and members of your household travel to participate in indoor practices or competitions?

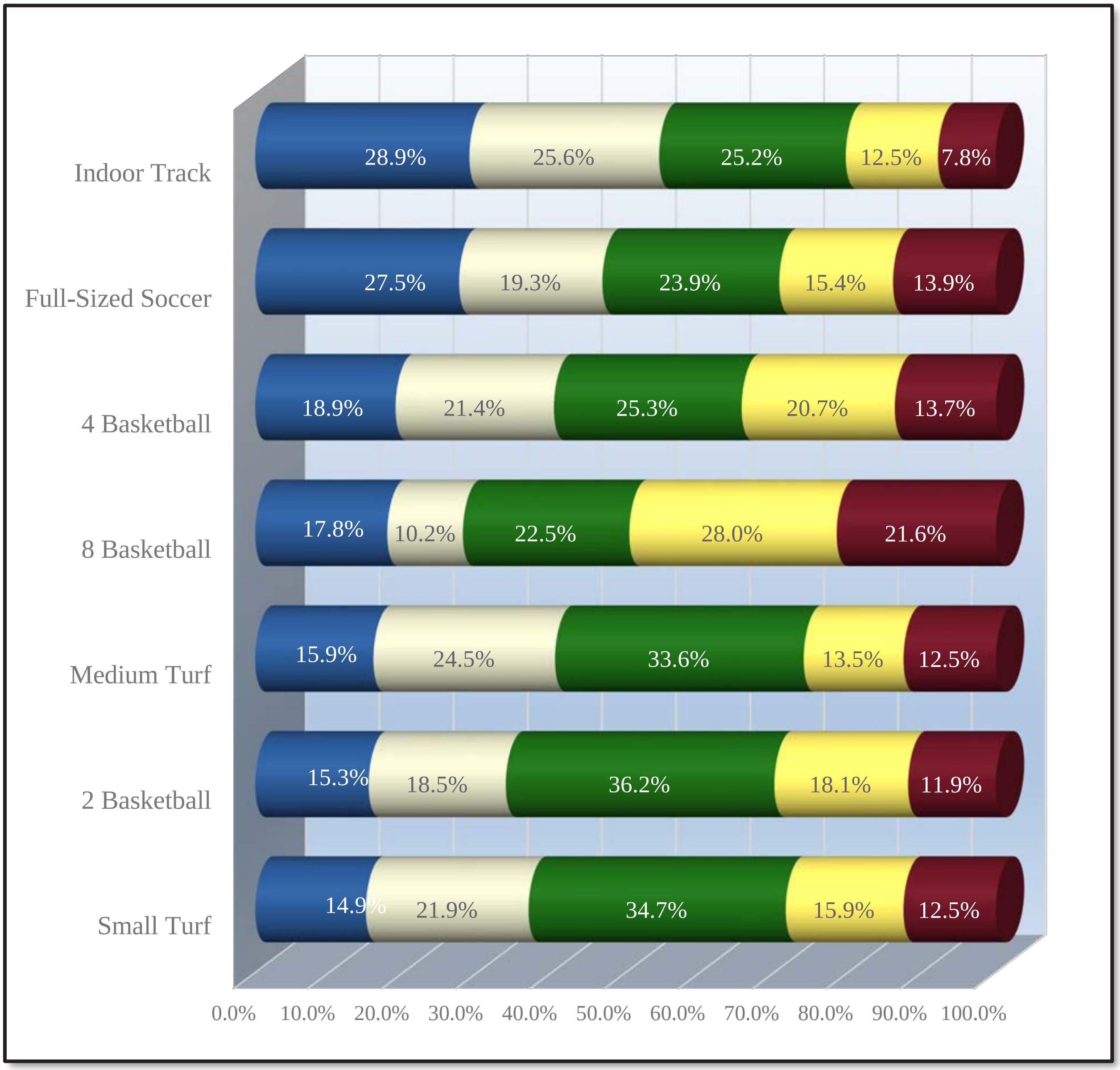


Options	Responses
Less than 30 minutes	228
30-60 minutes	209
61-90 minutes	11
More than 90 minutes	15
Skipped	567

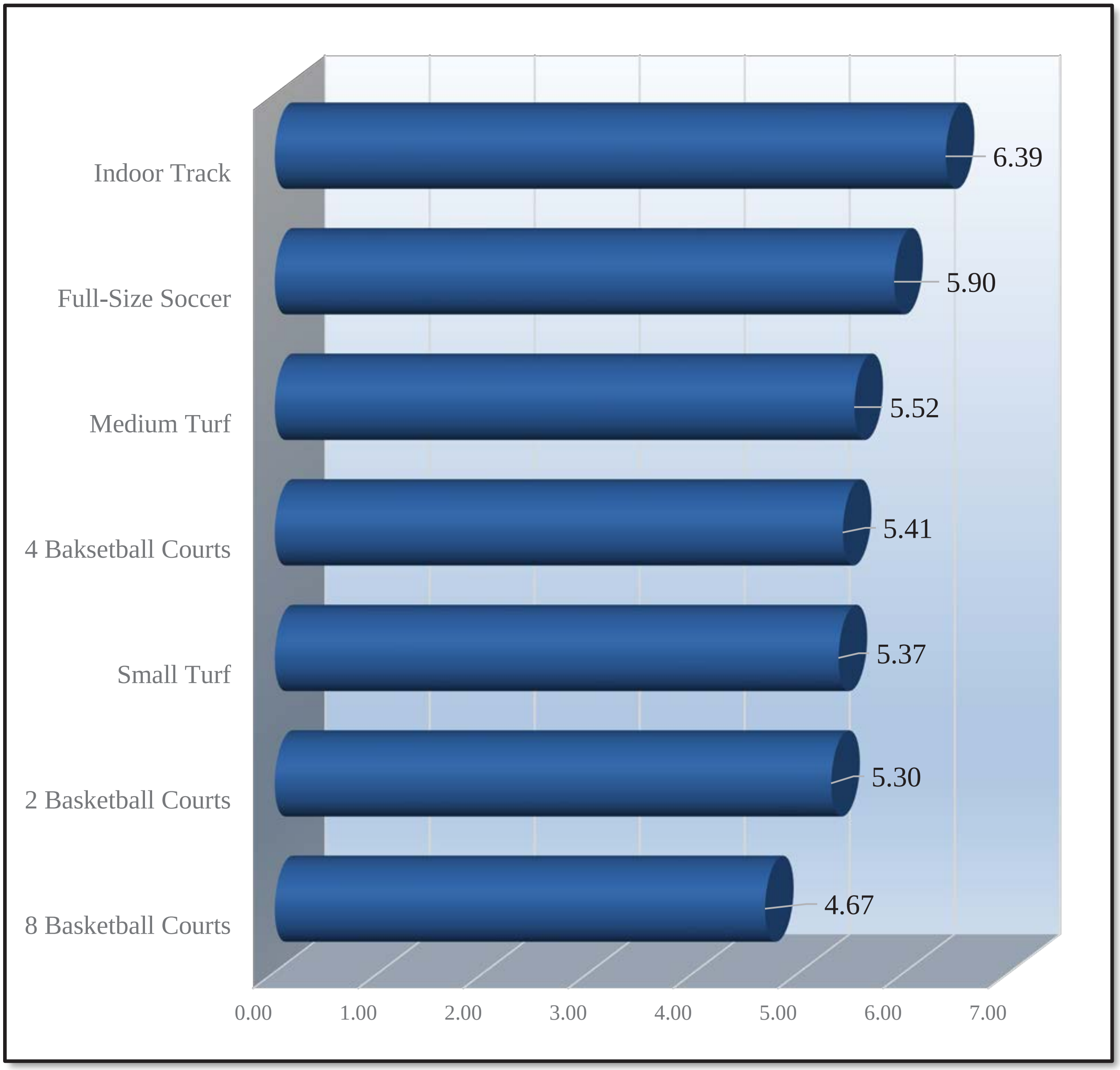
Question #7 – What types of indoor practices or competitions do you and members of your household travel outside of St. Charles County for? (please check all that apply)



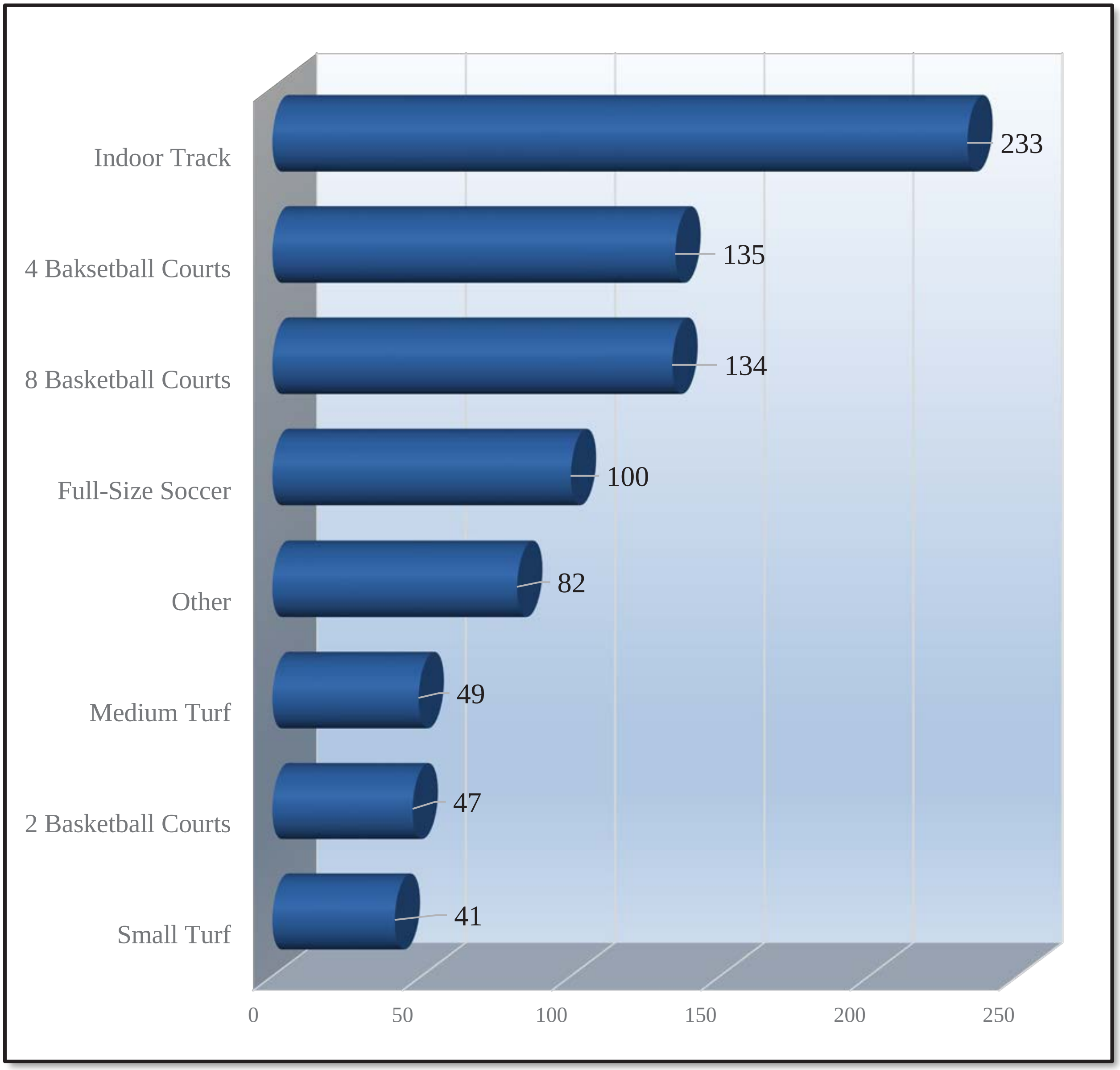
Question #8 – The following are configuration options for areas that could be included in an indoor facility. Please identify how important each of the areas are to you or members of your household.



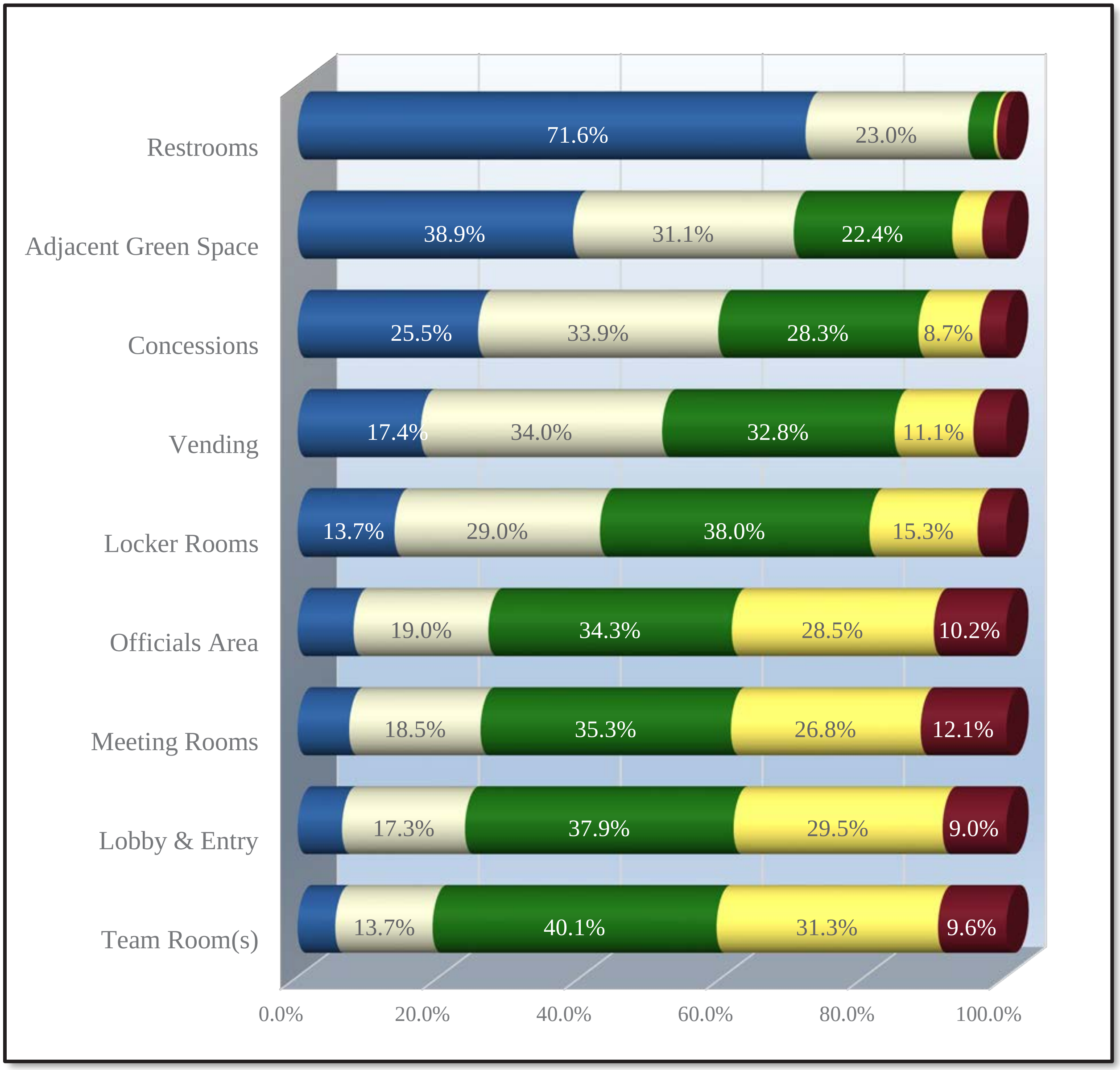
Question #8 – Weighted Responses.



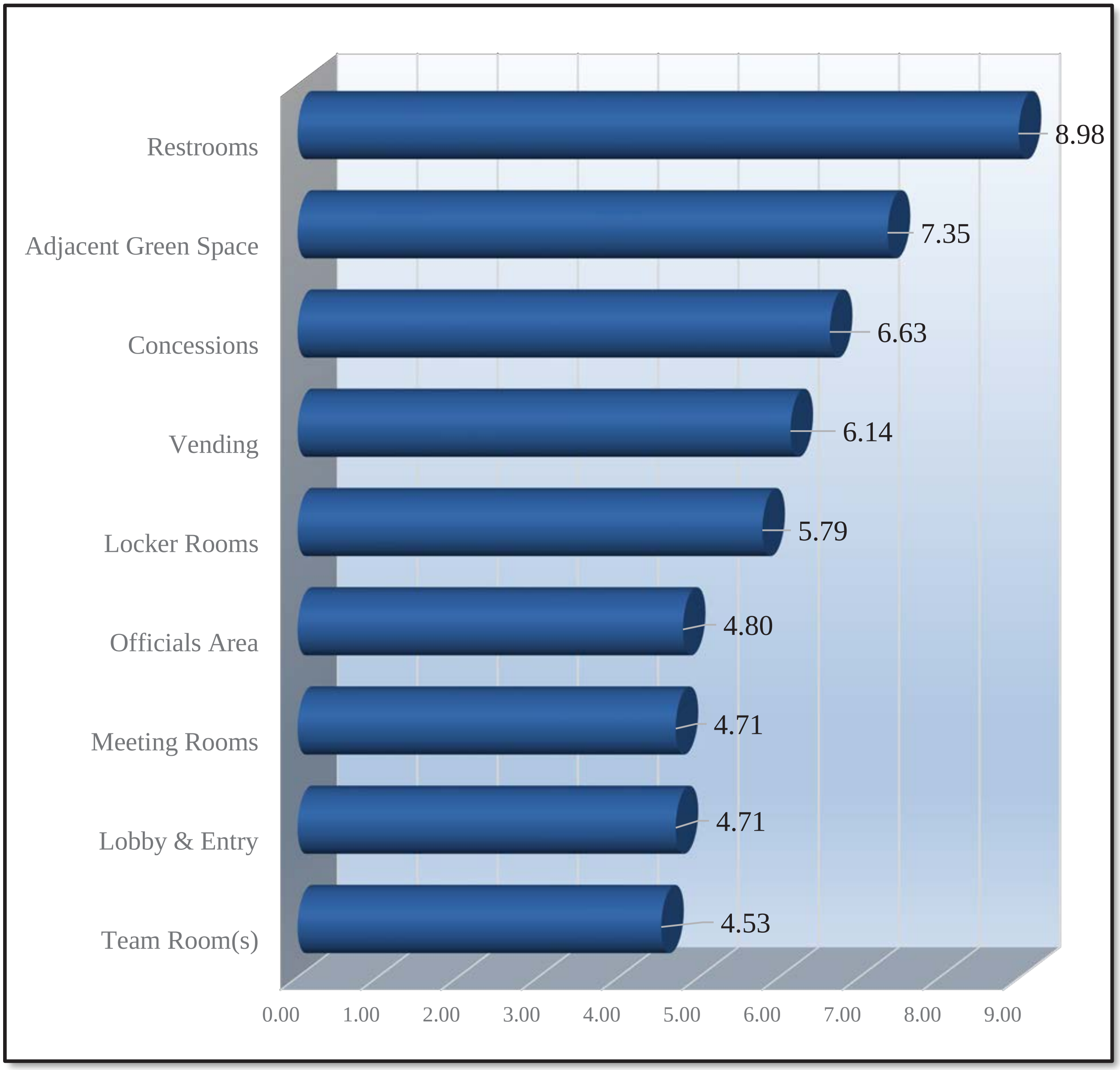
Question #9 – Of the components listed in the previous question which is the most important to you and your household?



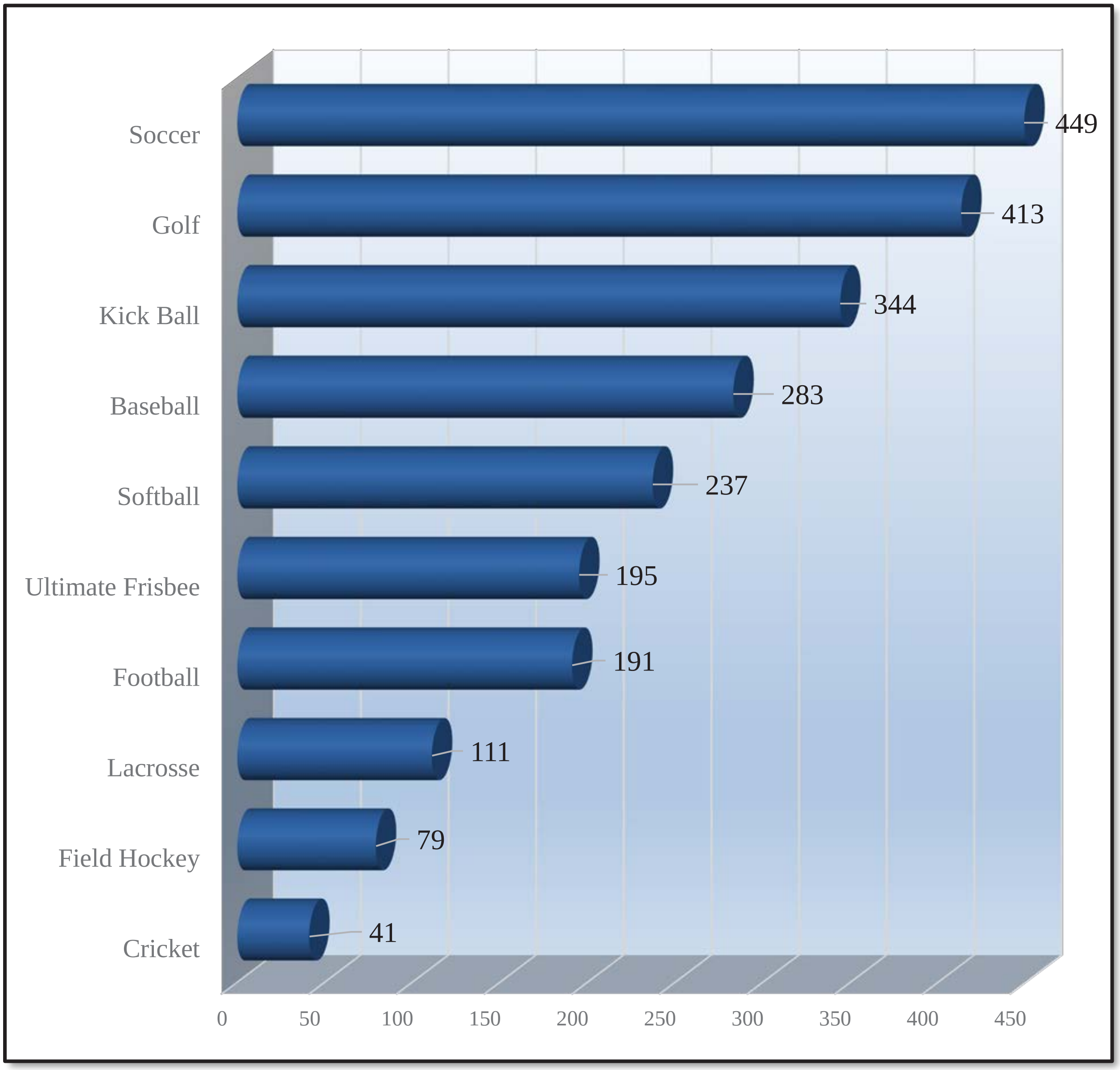
Question #10 – The following are other areas that could be included in an indoor facility. Please identify how important each of the areas are to you or members of your household.



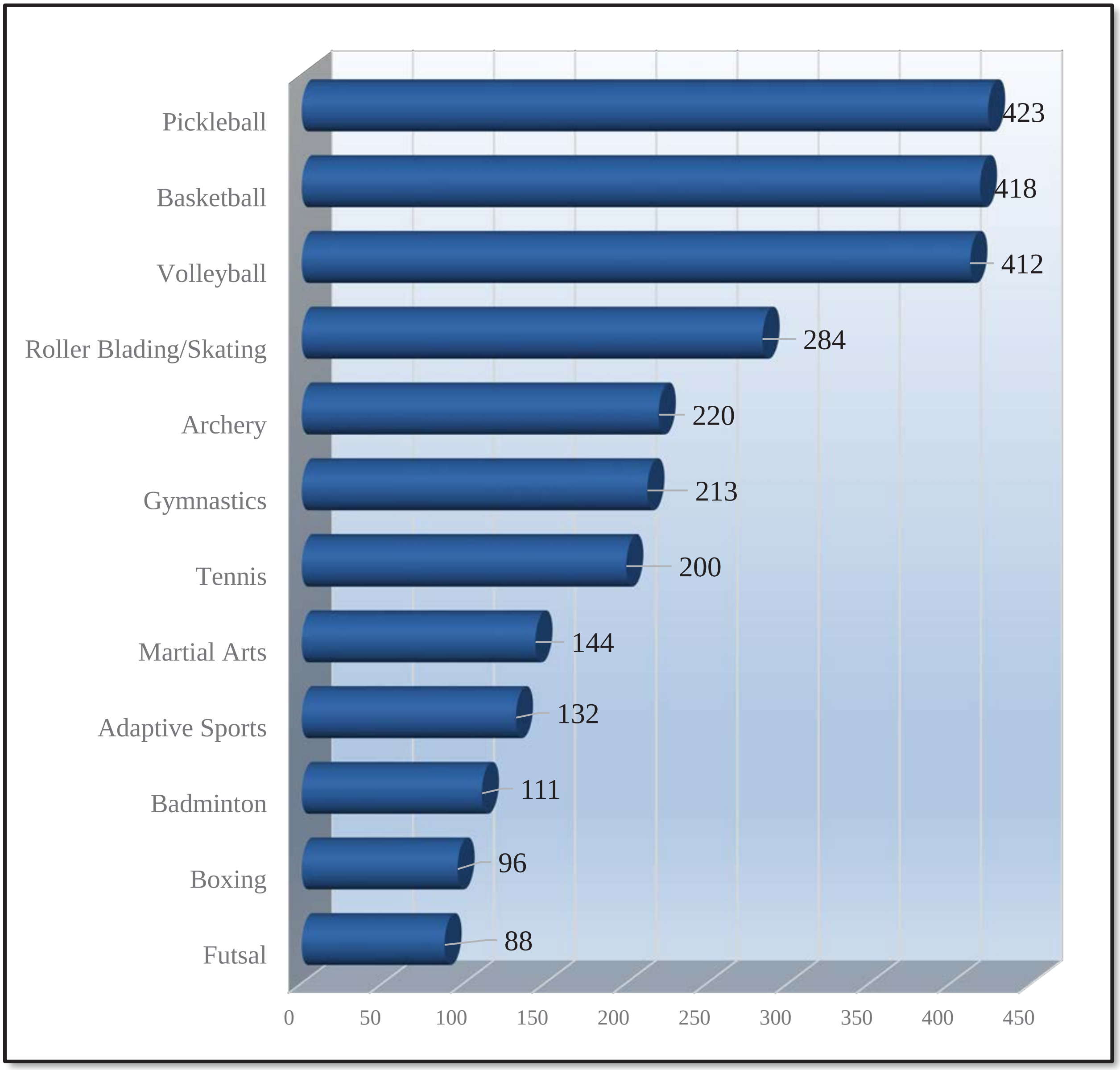
Question #10 – Weighted Responses.



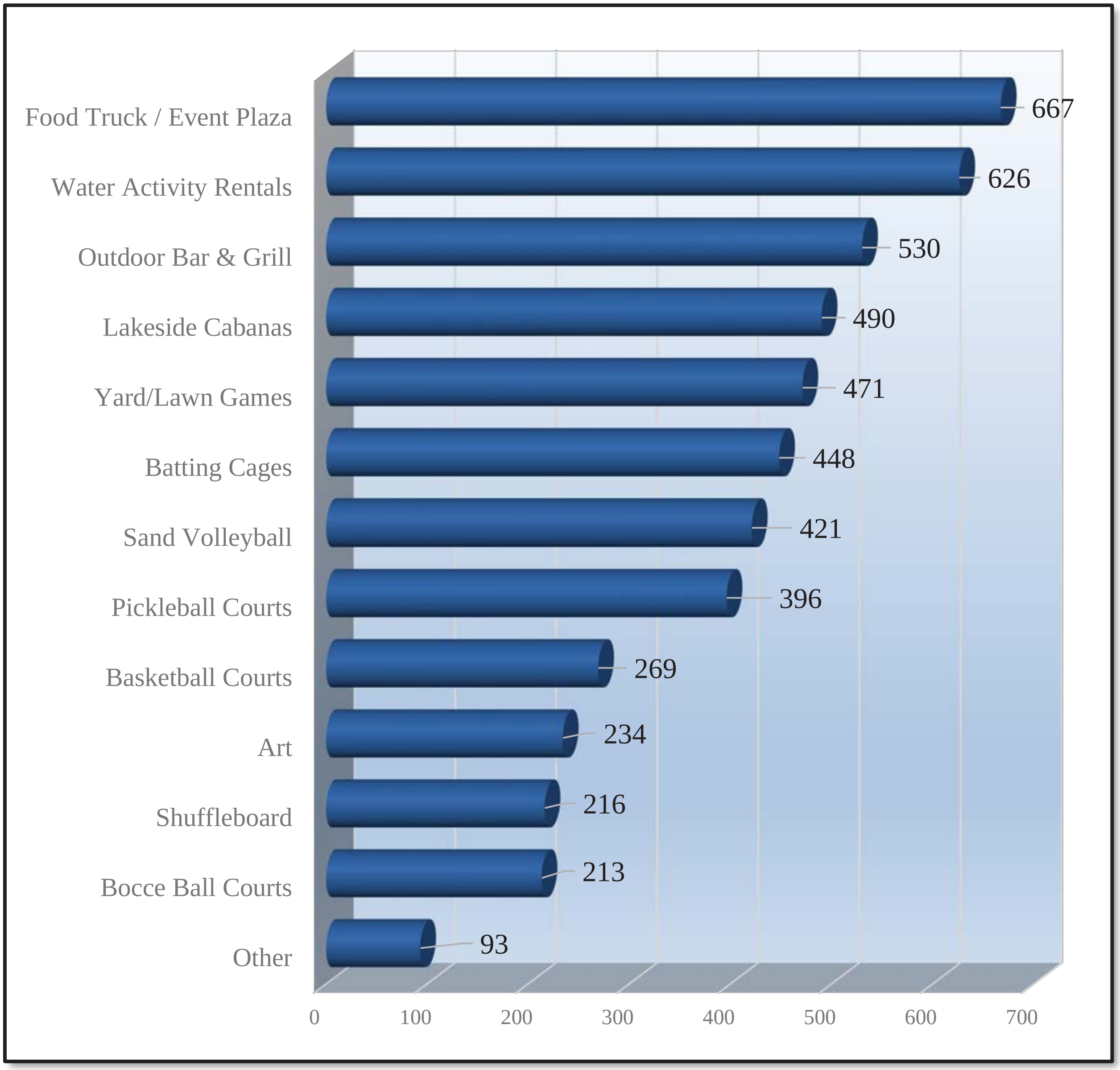
Question #11 – The following is a list of indoor programs that could take place on an indoor artificial turf surface. Please check all that you or members of your household would be interested in.



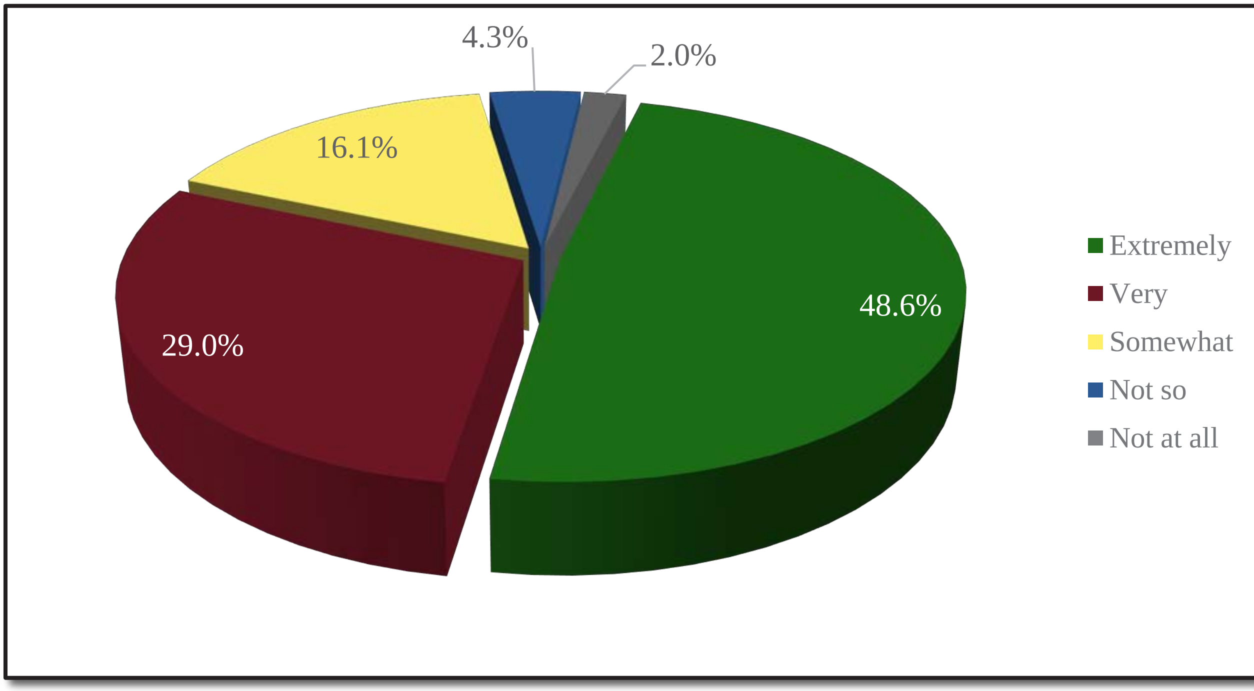
Question #12 – The following is a list of indoor programs that could take place on an indoor court surface. Please check all that you or members of your household would be interested in.



Question #13 – The following is a list of activities that could take place outdoors at the HUB. Please check all that you or members of your household would be interested in.

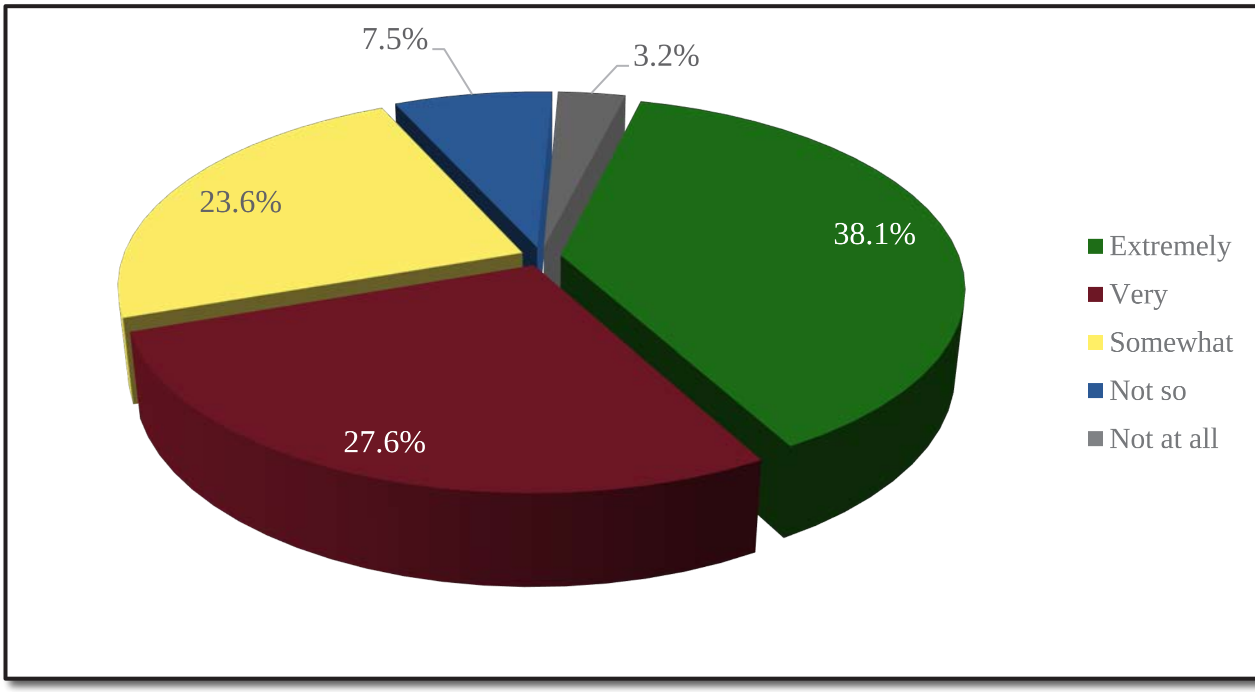


Question #14 – How important is it to you and your household that the proposed facility have a positive economic impact on the community?



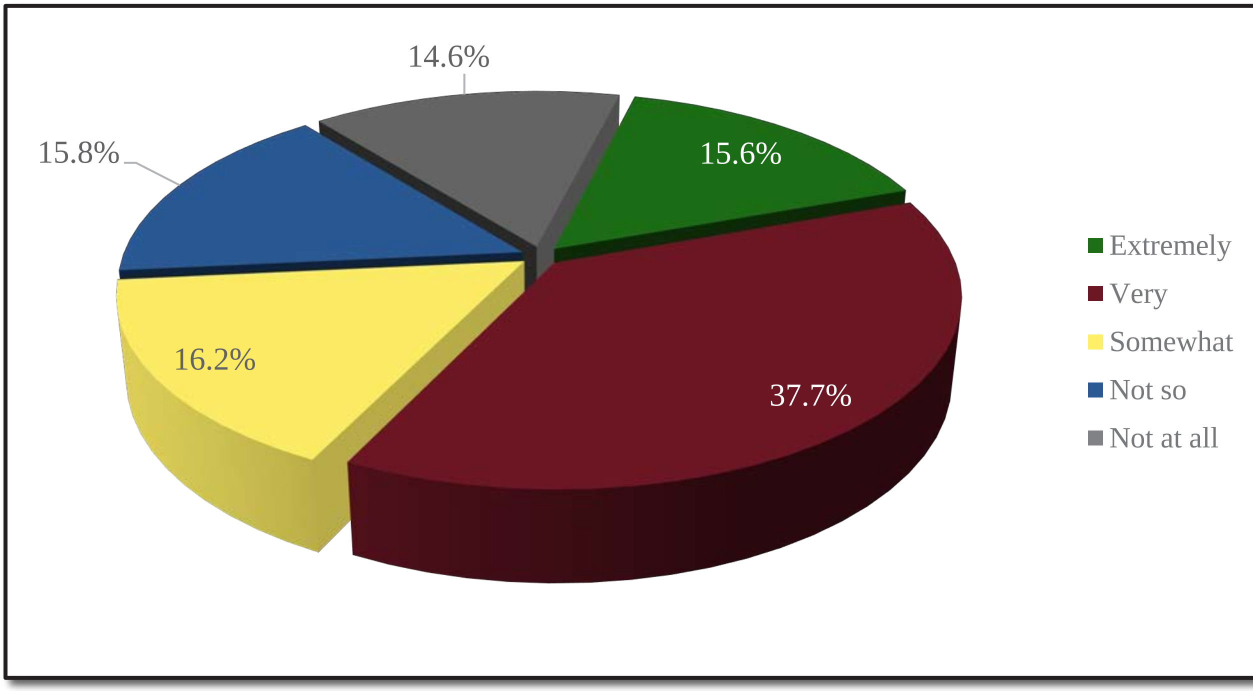
Options	Responses
Extremely Important	393
Very Important	234
Somewhat Important	130
Not so Important	35
Not at all Important	16
Skipped	222

Question #15 – How important is it to you and your household that the proposed facility maximize revenue generation to minimize, or eliminate, any tax subsidy to the annual operation of the facility.



Options	Responses
Extremely Important	307
Very Important	222
Somewhat Important	190
Not so Important	60
Not at all Important	25
Skipped	225

Question #16 – How supportive would you or members of your household be to a tax increase that would fund the construction and capital improvement of a fieldhouse?



Options	Responses
Extremely Important	126
Very Important	305
Somewhat Important	131
Not so Important	128
Not at all Important	118
Skipped	222

APPENDIX C
ECONOMIC IMPACT ANALYSIS

St. Charles
Economic Impact Analysis of a Proposed Fieldhouse

June 14th, 2024

JOHNSON CONSULTING

TABLE OF CONTENTS

JOHNSON CONSULTING

1. Introduction

Introduction

Transmittal Letter

June 14th, 2024

Re: Economic Impact Analysis for a Proposed Fieldhouse in St. Charles, MO

Dear St. Charles Parks & Recreation Department:

C.H. Johnson Consulting, Inc. (Johnson Consulting) is pleased to submit this **DRAFT** report to you regarding the economic impact study for the Fieldhouse in St. Charles, MO. Pursuant to our engagement, this report fulfills the scope of work outlined in the project proposal submitted by Johnson Consulting to BRS Architects on September 22nd, 2023.

The Consulting Team has no responsibility to update this report for events and circumstances occurring after the date of this report. The Consulting Team used sources deemed to be reliable but cannot guarantee their accuracy. Moreover, some of the estimates and analyses presented in this study are based on trends and assumptions, which can result in differences between projected results and actual results. Because events and circumstances frequently do not occur as expected, those differences may be material. This report is intended for the Clients' internal use and cannot be used for project underwriting purposes without Johnson Consulting's written consent.

We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely,

DRAFT

C.H. Johnson Consulting, Inc

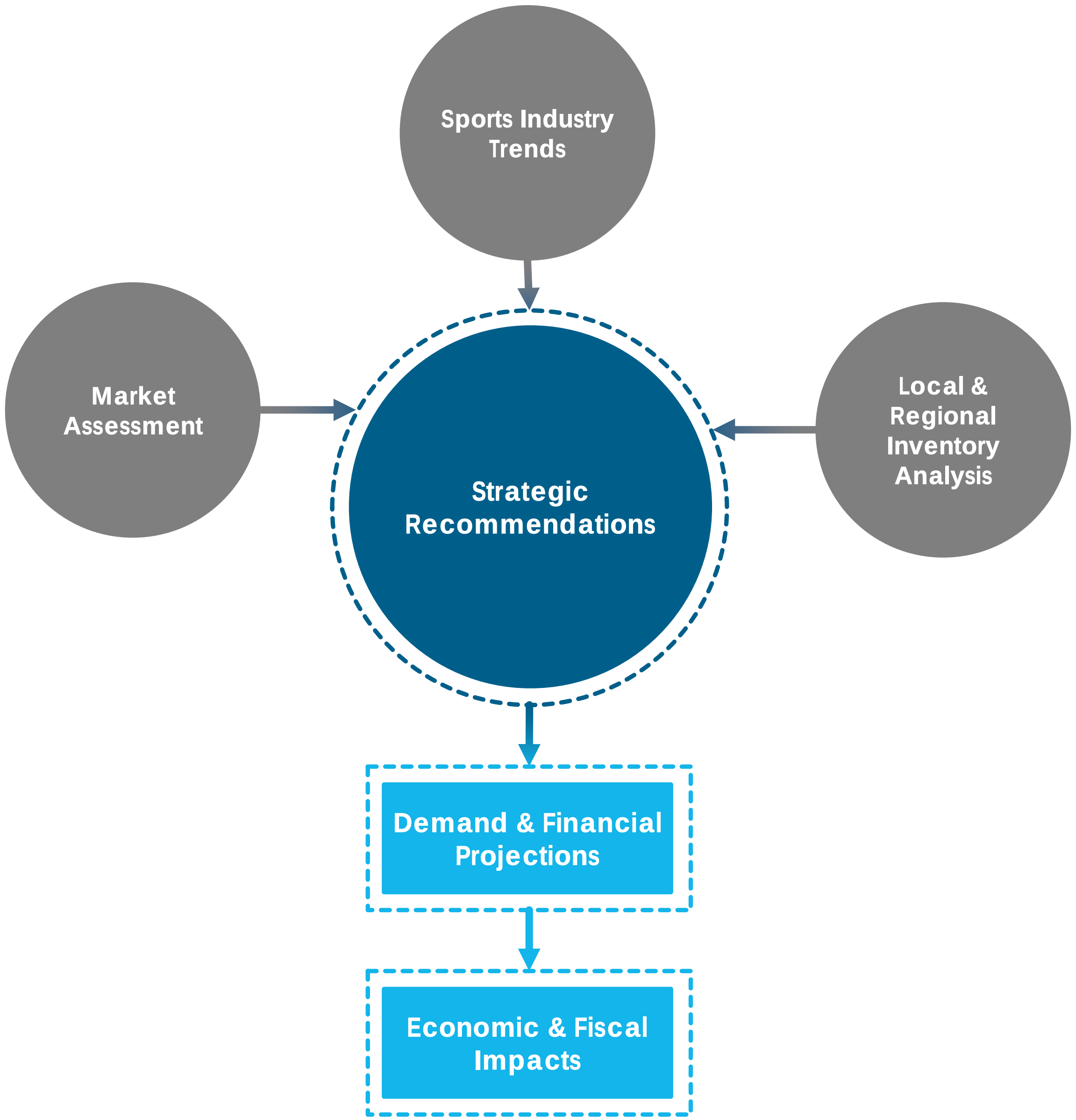
Introduction

Study Introduction & Methodology

Johnson Consulting was retained by BRS Architects, on behalf of the St. Charles Parks & Recreation Department, to conduct an Economic Impact Study for the proposed Fieldhouse in St. Charles, Missouri. The study aims to foster the ability of the development's owners and operators, as well as the community of St. Charles, to make informed decisions regarding the development and continuing operation of the proposed development. Broadly, the objective of this study is to answer the following questions:

- What is the local market's potential capacity to support the new project from a tournament prospective?
- What economic and fiscal impacts could be generated by the project?

In order to answer the questions above, Johnson Consulting developed and executed a comprehensive methodology for the study, which is illustrated by the figure on the right. The observations, analysis, and conclusions of the study will be presented throughout the remaining sections of this report.



Introduction

Project Overview

The City of St. Charles purchased 97 acres of property in 2019 located off Highway 94 and Highway B for a new park. In 2021, a master plan was developed that identified the park concept as a catalyst for economic development, as well as a community amenity. The vision for this Fieldhouse and Activity Hub is to serve St. Charles residents while also functioning as a sports tourism destination. This study considered both market data and community input to evaluate the potential economic benefits of the proposed facility. Johnson Consulting has been tasked to advise on the sports tourism orientation of the development as well as provide economic and fiscal impact projections based on the recommended programming put forth by the Consulting Team.

Development Rendering May 2024

JOHNSON CONSULTING

2. Market Assessment

Market Assessment

Overview

St. Charles is a northwestern suburb of St. Louis, 30 minutes northwest of downtown St. Louis. St. Charles is a river city with a unique history, founded by a French Canadian Fur trader in 1769.

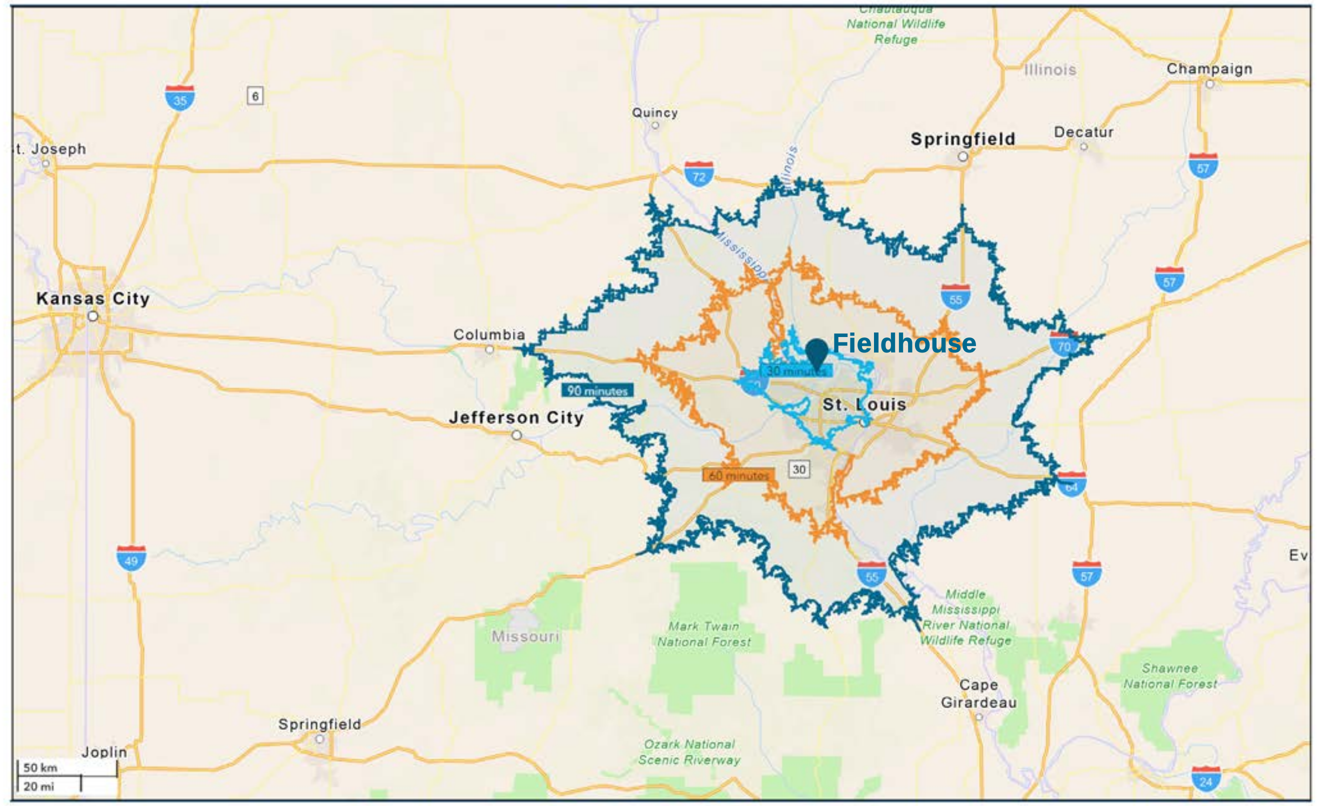
According to the Federal Highway Administration, St. Charles was the site of the first interstate highway project in the nation. Major highways in St. Charles include Interstates 64 and 70, Missouri 370, 94, and 364. The closest airport to St. Charles is the Lambert-St. Louis Airport. St. Charles Area Transit (SCAT) provides public transportation services for St. Louis and its suburbs The City of St. Charles has recently developed a streetcar system that will run on a loop connecting New Town to downtown St. Charles.

The proposed St. Charles Fieldhouse and Hub will be located off of Highway 94 and Highway B, adjacent to the New Town at St. Charles development. The property is currently vacant, providing a blank canvas to develop as a local and regional asset.

The map at right shows the 30-, 60-, and 90-minute drive-time radii of the subject site, which reflect the likely draw of the contemplated facility. These catchments will be compared to the City, County, State, and National market trends in the following market analysis.

St. Charles Fieldhouse

30-, 60-, 90- Minute Drive-Time Catchments



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Market Assessment

Population

Large and growing population bases – particularly among individuals under the age of 25 – are critical for ensuring the success of sports, recreation, and entertainment facilities. Larger regional populations equate to more potential “drive-to” participants and locally based demand.

The resident population of St. Charles was just over 73,300 persons in 2023. The 30-minute, 60-minute, and 90-minute drive time catchment areas, reflecting the primary draw of the contemplated facility, have populations ranging from 1 million to over 3 million, with most of that concentrated within the 60-minute to 90-minute drive time window. Between 2010 and 2023, the population of St. Charles grew at an average rate of 0.9% per annum. This growth rate exceeded all comparative geographies' growth rates over that period, other than the County at 1.4%. The table at right shows the population trends for the United States, Missouri, St. Charles County, and St. Charles, as well as for the 30-minute, 60-minute, and 90-minute drive time catchment areas. The 60-minute to 90-minute drive time window encompasses the largest population bases in the market, namely St. Louis.

Population						
	2000	**2010**	**2023**	**2028**	**CAGR** 2010-2023**	**CAGR** 2023-2028**
United States	281,421,906	308,745,538	337,470,185	342,640,129	0.8%	0.3%
Missouri	5,595,211	5,988,927	6,208,310	6,239,262	0.3%	0.1%
St. Charles County	283,883	360,485	419,594	432,080	1.4%	0.6%
St. Charles	**61,700**	**66,739**	**73,325**	**75,896**	**0.9%**	**0.7%**
30-Minute Drive Time*	**1,053,732**	**1,064,750**	**1,071,264**	**1,075,089**	**0.1%**	**0.1%**
60-Minute Drive Time*	**2,469,495**	**2,571,429**	**2,608,670**	**2,607,383**	**0.1%**	**0.0%**
90-Minute Drive Time*	**2,872,581**	**2,993,283**	**3,022,730**	**3,018,634**	**0.1%**	**0.0%**

**Drive time from proposed Field House*

***Compounded Annual Growth Rate*

Sources: Esri, Johnson Consulting

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Market Assessment

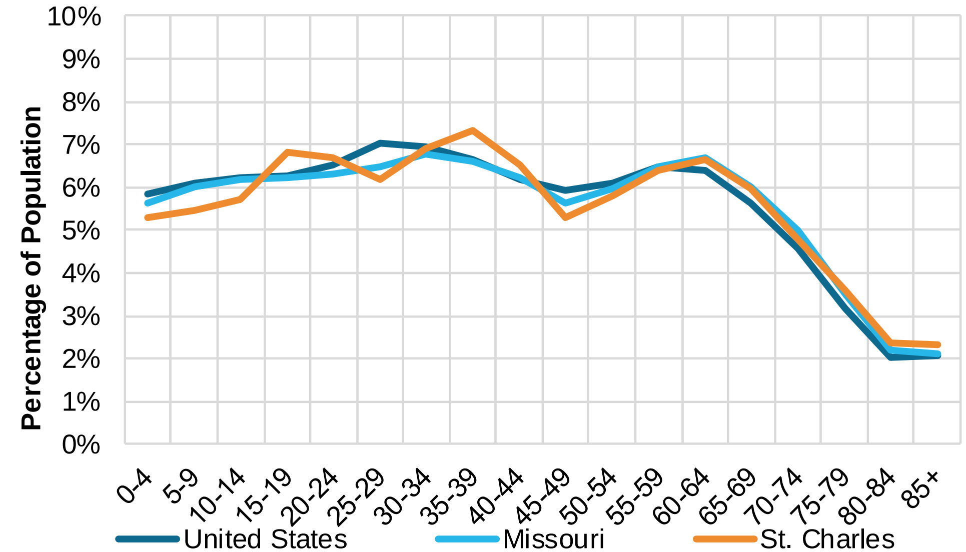
Age

Age is an important demographic indicator to consider when evaluating the market potential for new real estate developments and facilities. Some markets seek to combat "brain drain," a phenomenon where primarily college-educated young professionals are leaked to larger metropolitan markets. Other markets seek to attract wealthier retirees who bring economic spending, leisure time, and philanthropic dollars with them.

It is of crucial importance to have a high concentration of younger individuals (under age 25) in the area immediately surrounding a sports facility. While adult leagues are certainly a component of a successful sports facility's programming, a majority of utilization and demand comes from youths. The key is to achieve a programming balance that works within the social and economic context of the market.

In 2023, the median age of residents of St. Charles was 40 years, which is on par with the comparative geographies. However, the age distribution chart suggests there are several younger age cohorts with high concentrations. This indicates that the ability to draw participants from younger age cohorts will be important to the overall success of the contemplated facility, in addition to continuing to attract young families to the area.

2023 Age Distribution



Sources: Esri, Johnson Consulting

Median Age

	2010	2023	2028	CAGR** 2010-2023	CAGR** 2023-2028
United States	37	39	40	0.5%	0.4%
Missouri	38	40	41	0.5%	0.4%
St. Charles County	37	39	40	0.5%	0.5%
St. Charles	**37**	**40**	**41**	**0.8%**	**0.4%**
30-Minute Drive Time*	**38**	**40**	**41**	**0.6%**	**0.5%**
60-Minute Drive Time*	**38**	**40**	**41**	**0.5%**	**0.5%**
90-Minute Drive Time*	**38**	**40**	**41**	**0.5%**	**0.5%**

**Drive time from proposed Field House*

***Compounded Annual Growth Rate*

Sources: Esri, Johnson Consulting

Market Assessment

Education & Income

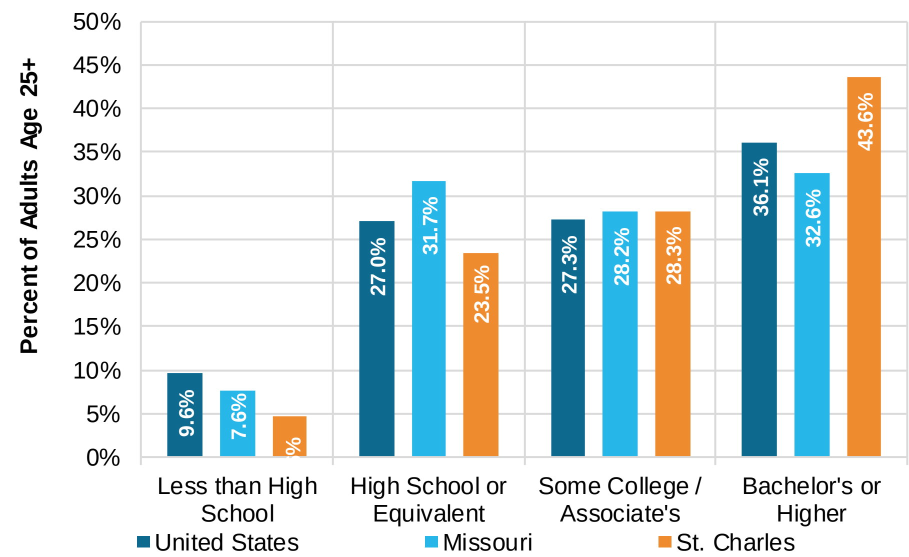
Education and income, although not strict predictors of sport and recreation facility performance, are important market attributes for benchmarking the level of activity in an area. Markets with higher educational attainment and income levels are more likely to have a robust economic base and healthy education system, which are key to ensuring long-term growth and resiliency.

St. Charles has relatively high level of higher-education attainment levels among adults aged 25+. 43.6% of St. Charles residents have obtained a Bachelor's Degree or higher, while the national average is 36.1%.

In 2023, the median household income in St. Charles was $77,449 per annum, which is higher than all other comparative geographies, with the exception of St. Charles County. Further, the projected annual growth rates for income levels are strong for the regional geography around St. Charles.

These statistics demonstrate a strong local and regional economy, a trend that will support the ongoing utilization of a sports facility.

2023 Educational Attainment



Sources: Esri, Johnson Consulting

Median Household Income

	2023	2028	CAGR**
United States	$72,603	$82,410	2.6%
Missouri	$63,390	$73,286	2.9%
St. Charles County	$96,151	$106,461	2.1%
St. Charles	**$77,449**	**$86,767**	**2.3%**
30-Minute Drive Time*	**$73,452**	**$83,921**	**2.7%**
60-Minute Drive Time*	**$73,565**	**$83,357**	**2.5%**
90-Minute Drive Time*	**$71,691**	**$81,484**	**2.6%**

**Drive time from proposed Field House*

***Compounded Annual Growth Rate*

Sources: Esri, Johnson Consulting

JOHNSON CONSULTING

Market Assessment

Average Spending

The current spending trends within a market can also provide insight on demand, purchasing power and the potential for return on investment for the proposed facility. As it relates to St. Charles, the median disposable income is relatively high compared to the surrounding area, which illustrates a greater opportunity for discretionary income to be spent on sporting events and participation.

This is further illustrated, as shown in the Average Annual Recreational Spending Index chart, St. Charles and the 30-, 60-, and 90-minute drive-time catchments are above the national average in almost category. For example, residents within a 30-minute drive of St. Charles spend 7% more on Organized Sports compared to the average U.S. citizen.

Median Disposable Income

	2023
United States	$58,809
Missouri	$53,426
St. Charles County	$78,553
St. Charles	**$62,487**
30-Minute Drive Time*	**$59,673**
60-Minute Drive Time*	**$59,495**
90-Minute Drive Time*	**$58,310**

**Drive time from proposed Field House*

***Compounded Annual Growth Rate*

Sources: Esri, Johnson Consulting

Average Annual Recretaional Spending Index*

Spending Category	St. Charles	30 Minute Drive Time	60 Minute Drive Time	90 Minute Drive Time
Club Memberships	**102**	**107**	**102**	**98**
Organized Sports	**102**	**106**	**101**	**97**
Sporting Events	**105**	**111**	**107**	**103**
Recreational Lessons	**97**	**101**	**96**	**91**

**National average is 100*

Source: Esri, Johnson Consulting

JOHNSON CONSULTING

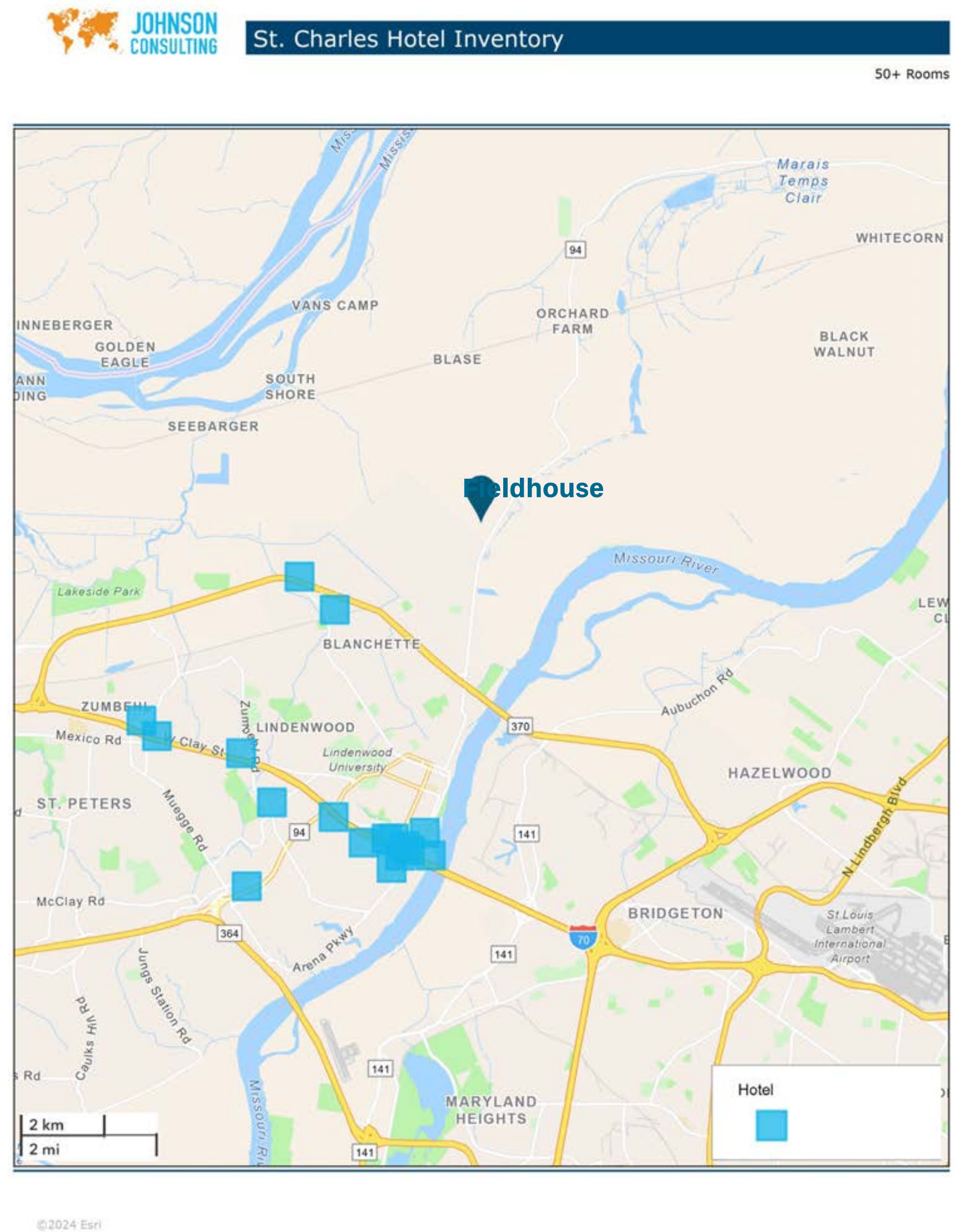
Market Assessment

Hotel Inventory

The existing hotel inventory in St. Charles for hotels with at least 50 guest rooms total 2,193 guest rooms and 26,235 SF of total meeting space across 17 hotel properties. The majority of existing hotel properties are located near downtown St. Charles or the highways. Development of the Fieldhouse may catalyze ancillary development, such as additional hotels, particularly to support overnight visitors for regional or national sports tournaments.

St. Charles Hotel Inventory (50+ Rooms)					
Hotel	Class	Rooms	Year Built (Renovated)	Largest Meeting Space (SF)	Total Meeting Space (SF)
Ameristar St Charles	Midscale	397	1994	10,000	22,000
Embassy Suites by Hilton St. Louis St. Charles	Upper Upscale	296	2005	2,800	8,587
Drury Plaza Hotel St Louis St Charles	Upscale	180	2017	2,090	2,881
Best Western Plus The Charles Hotel	Upper Midscale	133	1966 (2013)	709	1,020
InTown Suites St Charles	Economy	131	1997 (2006)		
Hampton Inn St. Charles St. Peters	Upper Midscale	122	1985 (2018)	230	230
WoodSpring Suites St Louis St Charles	Economy	121	2008		
Hampton by Hilton St. Charles Old Town Area	Upper Midscale	117	2021		
Relax Inn Saint Charles	Economy	97	1986		
Candlewood Suites St. Louis - St. Charles	Midscale	94	1999	252	252
Tru by Hilton St Charles St Louis	Midscale	87	2018		
Country Inn & Suites St Charles	Upper Midscale	86	2004	100	100
Holiday Inn Express & Suites St Charles	Upper Midscale	73	2009	625	625
Sleep Inn & Suites Saint Charles	Midscale	72	2000	225	225
Comfort Suites Saint Charles Saint Louis	Upper Midscale	71	1962 (2013)		
Americas Best Value Inn & Suites St Louis, St Ch	Economy	64	1997	315	315
Super 8 St Charles	Economy	52	1988		
Total		**2,193**		**17,346**	**36,235**

Sources: CoStar, Johnson Consulting



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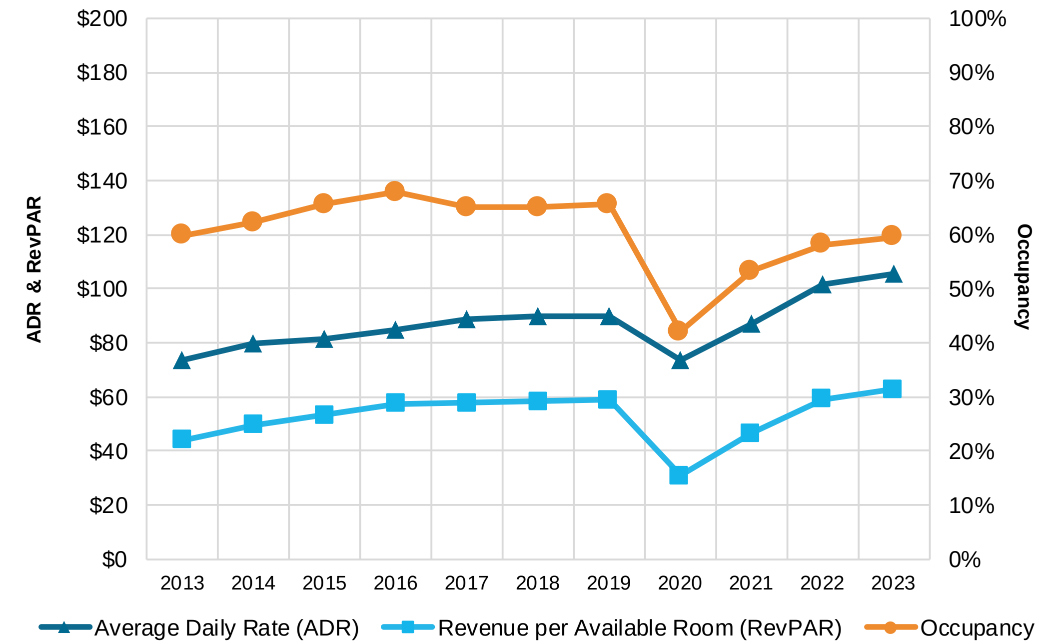
Market Assessment

Hotel Market

Across the 17 hotel properties in the St. Charles area, market performance had been on an upward trajectory until 2019. The COVID-19 pandemic had a profound negative impact on the hotel industry at large. Notwithstanding this, hotel properties within the St. Charles market have seen strong and steady growth in Average Daily Rates (ADR) and Revenue per Available Room (RevPAR) over recent years. These peaks represent a significant rebound from the dip in 2020 caused by the early stages of the pandemic. However, these rates are still lower than the national average and a new sports tourism asset will have a positive impact on the overall hotel market.

Data from CoStar indicates that there are three proposed hotels that could add 343 additional hotel rooms to the market by 2034.

St. Charles Hotel Market Performance (50+ Rooms)



Sources: CoStar, Johnson Consulting

St. Charles Hotel Pipeline (50+ Rooms)

Property Name	Hotel Class	Status	Year Built	Rooms
St. Charles RiverPointe Hotel	Upper Midscale	Proposed	2027	150
TownePlace Suites by Marriott St. Charles	Upper Midscale	Final Planning	2026	93
Home2 Suites by Hilton St. Charles Old Town	Upper Midscale	Proposed	2034	100
Total				**343**

Sources: CoStar, Johnson Consulting

3. Sports Industry Trends

Sports Industry Trends

Sports Tourism

Throughout the past decade, youth sports facilities aimed at generating tourism through large multi-day tournaments have become increasingly common, as their magnitude is often able to draw demand from surrounding states, and sometimes the entire country. While generating sports tourism demand relies on several factors, the generally accepted standard for a facility to qualify as a sports tourism facility for each surface type as follows:

Baseball / Softball Facility: 8 or more surfaces

Basketball / Volleyball Facility: 8 or more surfaces (16 for volleyball)

Soccer / Multipurpose Facility: 8 or more surfaces

Depending on the mission and goals of a facility there will be a varying desire for the number of sports court surfaces. A facility that aims to draw in regional and national events will want to maximize the numbers of courts, while a facility with the objective of meeting more of a local demand for sports and recreation will look to right-size the facility based on community needs. The diagram at right illustrates possible court orientations based on the scale of the facility. As shown, a 20,000 SF facility can fit 2 basketball courts while a 100,000 SF facility can fit 11 basketball courts.

Sports Industry Trends

Sports Tourism

The number of surfaces is not necessarily the only determining factor for whether a facility will generate sports tourism. Other factors that influence the success of sports tourism facilities include:

Strategic location: Facilities that have major metropolitan areas within close proximities (~4-hour drive time) are accessible to larger amounts of people, and thus have more opportunities to host larger events, and can rely on steady local and regional events to provide consistent demand and out of town visitors.

Proximity to other competitive sports tourism facilities: While a sports tourism facility with an ideal strategic location near a major US city may initially seem like an ideal development, it is possible that similar facilities have already been developed nearby and would represent significant competition for a new facility.

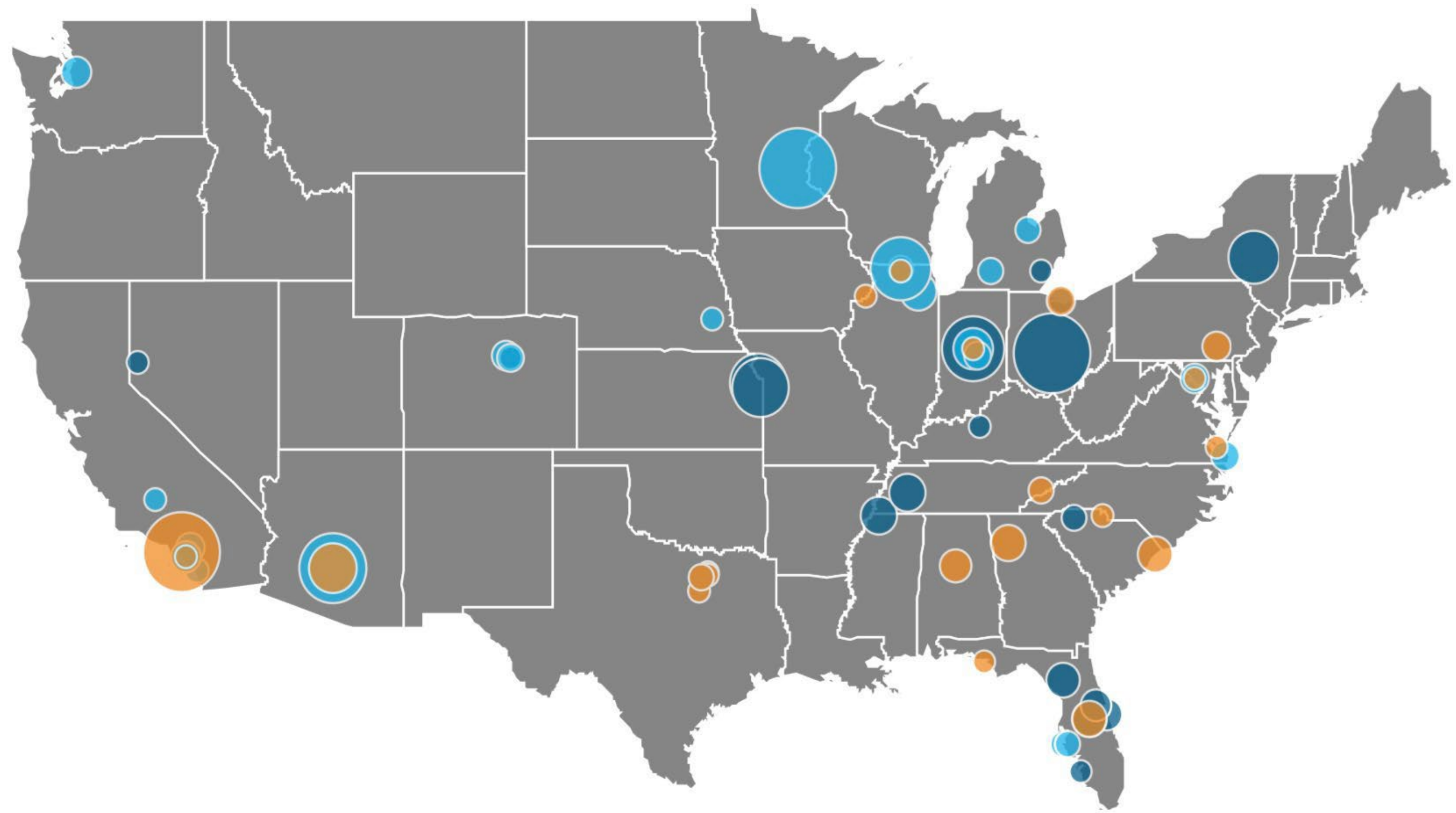
Quality: The quality of the surfaces is often a major selling point for the most prominent sports tourism facilities in the country. Significant investment in the development and upkeep of top-quality surfaces and buildings, as well as other features such as lighting, parking, and management are essential for acquiring major events that bring in visitors from farther destinations.

Partnerships and sponsorships: Gaining recognition through an affiliation with a well-known sports team (e.g. NBA, NFL, or MLB team) or prominent athletic/sports- based company (e.g. Nike, Under Armour, Gatorade) can help propel a facility to national recognition, depending on the prominence of the sponsor/partner.

Sports Industry Trends

Mega Sports Complexes

Sports Tourism facilities are often referred to as “mega sports complexes,” since they consist of many surfaces to accommodate large numbers of teams and participants. These facilities attract large tournaments and special events, usually hosting such events on weekends. During the week, some of these facilities will host events, leagues, and practices for local park districts, recreational little leagues, or travel teams to generate additional revenues. However, priority scheduling will be given to the travel tournaments that will generate economic and fiscal impacts for the local communities. The goal of sports tourism facilities is to attract events and visitors from outside of the region and/or state in order to generate additional room nights and introduce new dollars to the community.



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

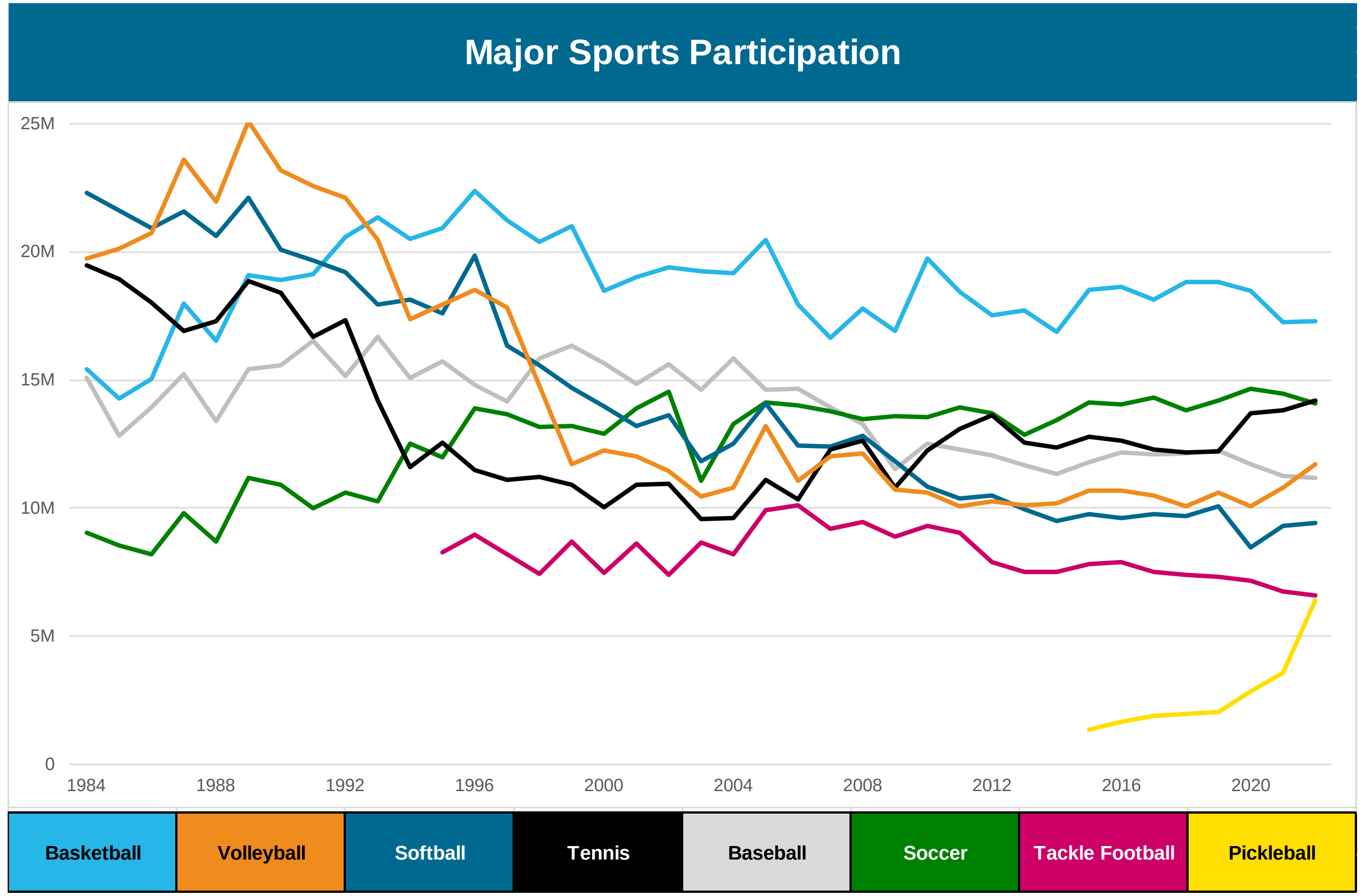
Type of Sports Complex
- Outdoor Multipurpose
- Baseball & Softball
- Indoor Multipurpose

Number of Surfaces

Sports Industry Trends

Major Participation Trends

The graph at right shows the participation trends for major sports through the last several decades. Youth sports specialization has caused dramatic declines in overall participation in recent years as young athletes are choosing to focus on a single sport rather than participate in multiple, as was the trend historically.



Sources: NSGA Sports Participation Survey, Johnson Consulting

Sports Industry Trends

Market Penetration Analysis

Identifying the size and target market for the proposed Fieldhouse is critical to ensuring the long-term success of the project and will give a more accurate depiction of how much demand the facility has in the market. Johnson Consulting performed a market penetration analysis for the drive-time catchments and the entire nation. In order to complete this market penetration analysis, Johnson Consulting gathered population data and sports participation rates from Esri and the Sports & Fitness Industry Association (SFIA). This data was then multiplied by an estimated market penetration rate based on the performance of comparable facilities, selected due to similarities in scale, quality, and setting.

The result is a total obtainable population of nearly 84,000 participants for the 90-minute drive time catchment. In other words, at stabilization, the proposed development can reasonably target approximately 84,000 visitations from tournament players and coaches per year.

Market Penetration Analysis
Total Population x Participation Rate x Penetration Rate = Estimated Demand

	Participation Rate	30-Minute Drive Time	60-Minute Drive Time	90-Minute Drive Time	Total
Total Population		**1,071,264**	**2,608,670**	**3,022,730**	**337,470,185**
Soccer	5.1%	54,755	133,336	154,500	17,249,000
Basketball	7.4%	79,096	192,610	223,182	24,917,000
Volleyball (Court & Sand)	3.2%	34,560	84,157	97,515	10,887,000
Baseball	4.7%	50,168	122,166	141,557	15,804,000
Softball	2.8%	29,563	71,990	83,417	9,313,000
Football (Tackle, Touch, & Flag)	5.1%	54,158	131,883	152,816	17,061,000
Pickleball	1.0%	10,983	26,746	30,991	3,460,000
Lacrosse	0.6%	6,714	16,349	18,944	2,115,000
Cheerleading	1.1%	11,910	29,003	33,607	3,752,000
Dance	2.3%	25,109	61,145	70,850	7,910,000
Gymnastics	1.4%	14,916	36,324	42,089	4,699,000
Total	**35.4%**	**371,934**	**905,710**	**1,049,468**	**117,167,000**
Penetration Rate		**33.0%**	**15.0%**	**8.0%**	
Soccer		18,069	20,000	12,360	58,883
Basketball		26,102	28,892	17,855	85,059
Volleyball (Court & Sand)		11,405	12,624	7,801	37,165
Baseball		16,555	18,325	11,325	53,950
Softball		9,756	10,799	6,673	31,792
Football (Tackle, Touch, & Flag)		17,872	19,782	12,225	58,241
Pickleball		3,625	4,012	2,479	11,811
Lacrosse		2,216	2,452	1,516	7,220
Cheerleading		3,930	4,350	2,689	12,808
Dance		8,286	9,172	5,668	27,002
Gymnastics		4,922	5,449	3,367	16,041
Estimated Demand		**122,738**	**135,856**	**83,957**	**399,972**

Sources: Esri, SFIA, Johnson Consulting

Sports Industry Trends

Regional Inventory

The audit of regional sports facilities includes facilities with at least 6 surfaces, including basketball courts, indoor or outdoor multipurpose fields, and/or baseball/softball diamonds. Most competitive regional tournament facilities are outdoor facilities. The Chesterfield Sports Complex and the Center in St. Louis would be the most significant competition as far as indoor sports facilities, but they are serving their own markets and are largely at capacity. This illustrates unmet demand and gap in the market that may be met by the proposed Fieldhouse development in St. Charles.

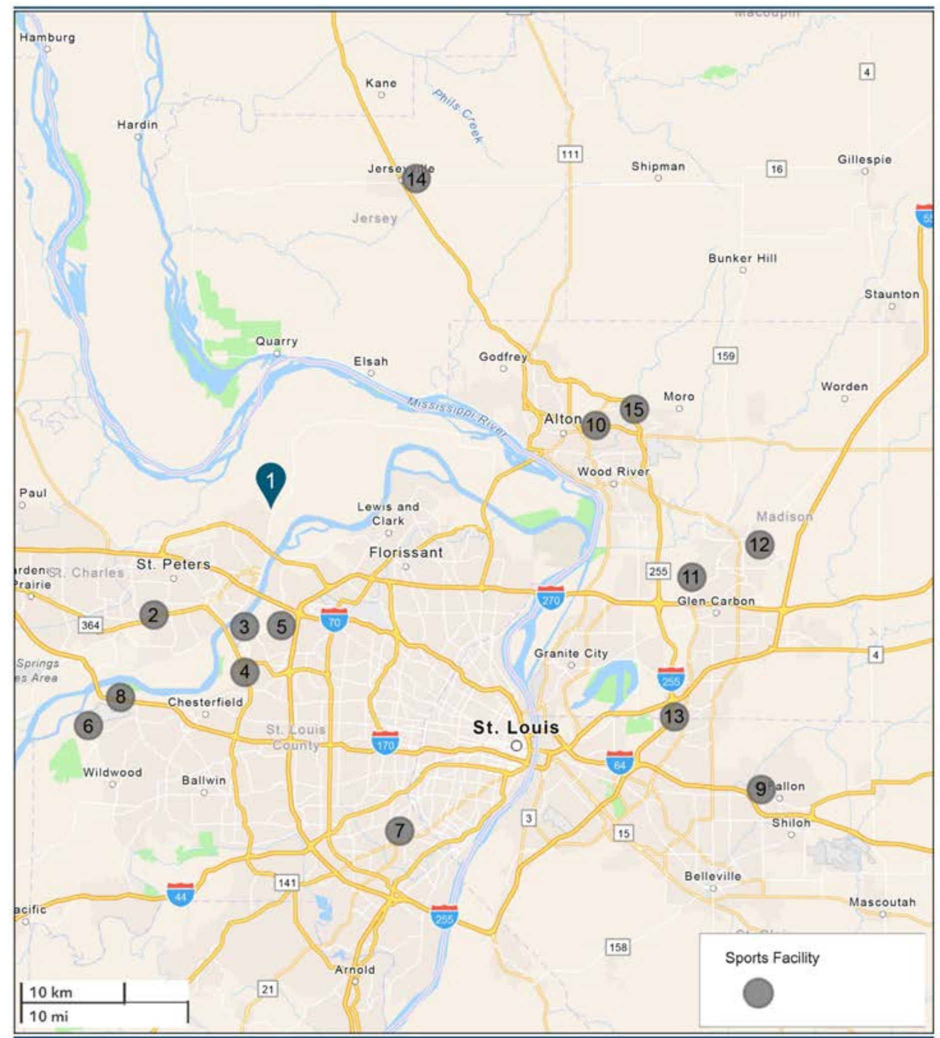
St. Charles Sports Regional Facility Inventory (6+ Surfaces)

	Facility	Indoor/Outdoor	Features		
			Basketball Courts	Multipurpose Rectangles	Diamonds
	0-30 Minutes				
1	**St. Charles Fieldhouse**	**Indoor**	**6**	**2**	
2	St. Charles Soccer Coomplex	Outdoor		16	
3	Sportport International	Outdoor		15	
4	Lou Fusz Soccer Complex	Outdoor		10	
5	Creve Coeur Park Soccer Complex	Outdoor		13	
	31-90 Minutes				
6	Chesterfield Sports Complex	Indoor	9		
7	Center St. Louis	Indoor	6	1	
8	Chesterfield Valley Athletic Complex	Outdoor		10	21
9	O'Fallon Family Sports Park	Outdoor		10	12
10	Gordon Moore Park	Outdoor		10	8
11	Ralph Korte Staadium & Sports Complex	Outdoor		7	
12	Plumner Family Park	Outdoor		6	4
13	Jaycee Sports Complex	Outdoor		2	12
14	Dolan Park	Outdoor		4	6
15	Bethalto Sports Complex	Outdoor		4	8

Sources: Playeasy, Relevant Facilities, Johnson Consulting

Sports Facility Inventory

6+ Surfaces



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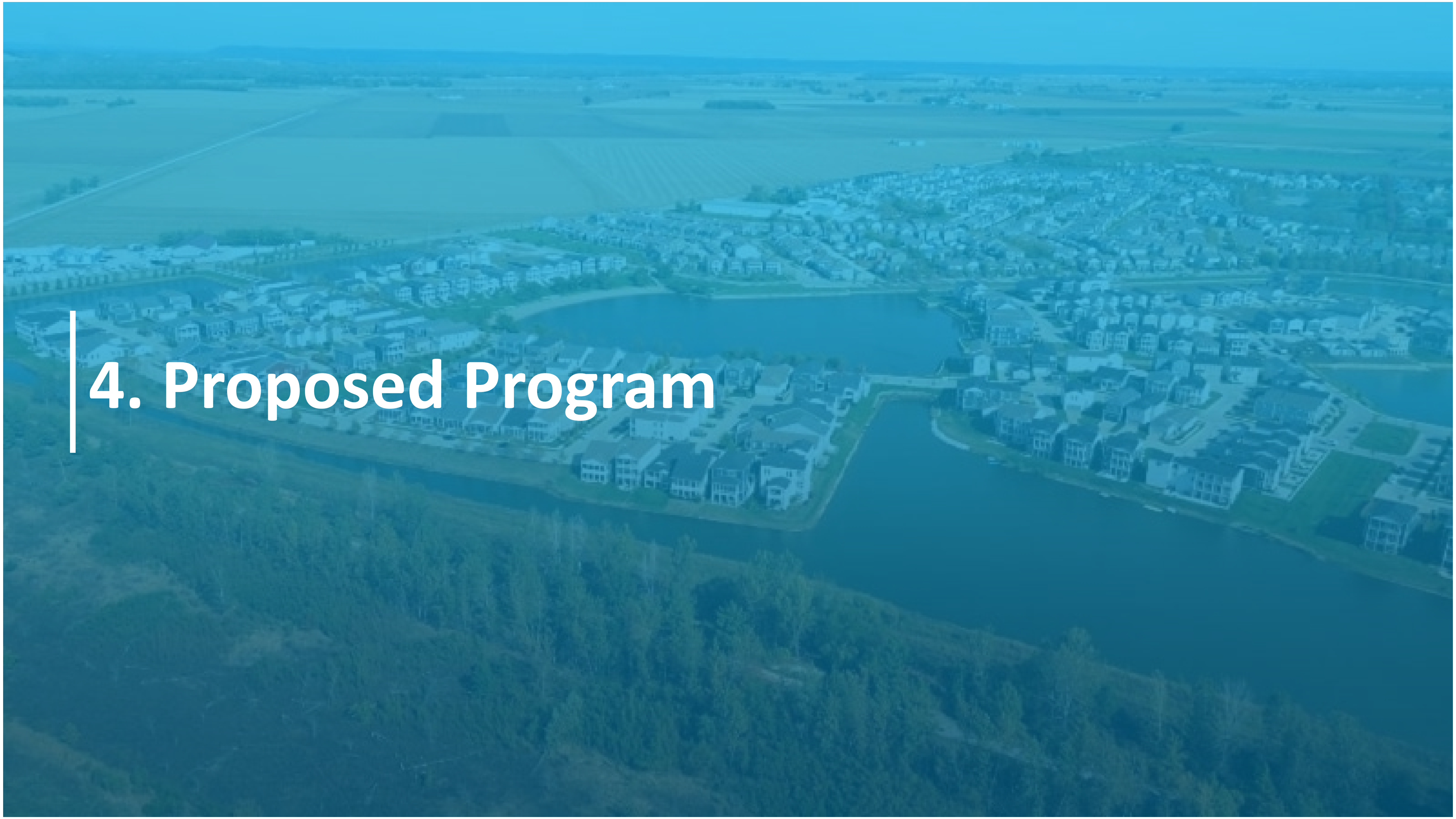
Sports Industry Trends

Implications

Ultimately, participation trends point towards an increase in sport specialization and an increase in the amount typically invested by parents in their children's sports ventures (especially when a child specializes in one sport). This has resulted in sports tourism facilities (also known as mega sports complexes) becoming higher in quality, and charging higher prices for services, which has been one of the factor's influencing higher costs of participation. While the popularity of many sports has seen fluctuations over the last decade, the ones that remain most relevant in terms of total number of participants, such as soccer, baseball, volleyball, and basketball, are the ones most often targeted by these larger sports tourism facilities. Baseball and softball have always seen a massive source of demand among the youth at all levels of competition, and facilities with multipurpose surfaces or hardcourt surfaces will see a similarly high demand from a combination of soccer/lacrosse/football players and basketball/volleyball players, respectively.

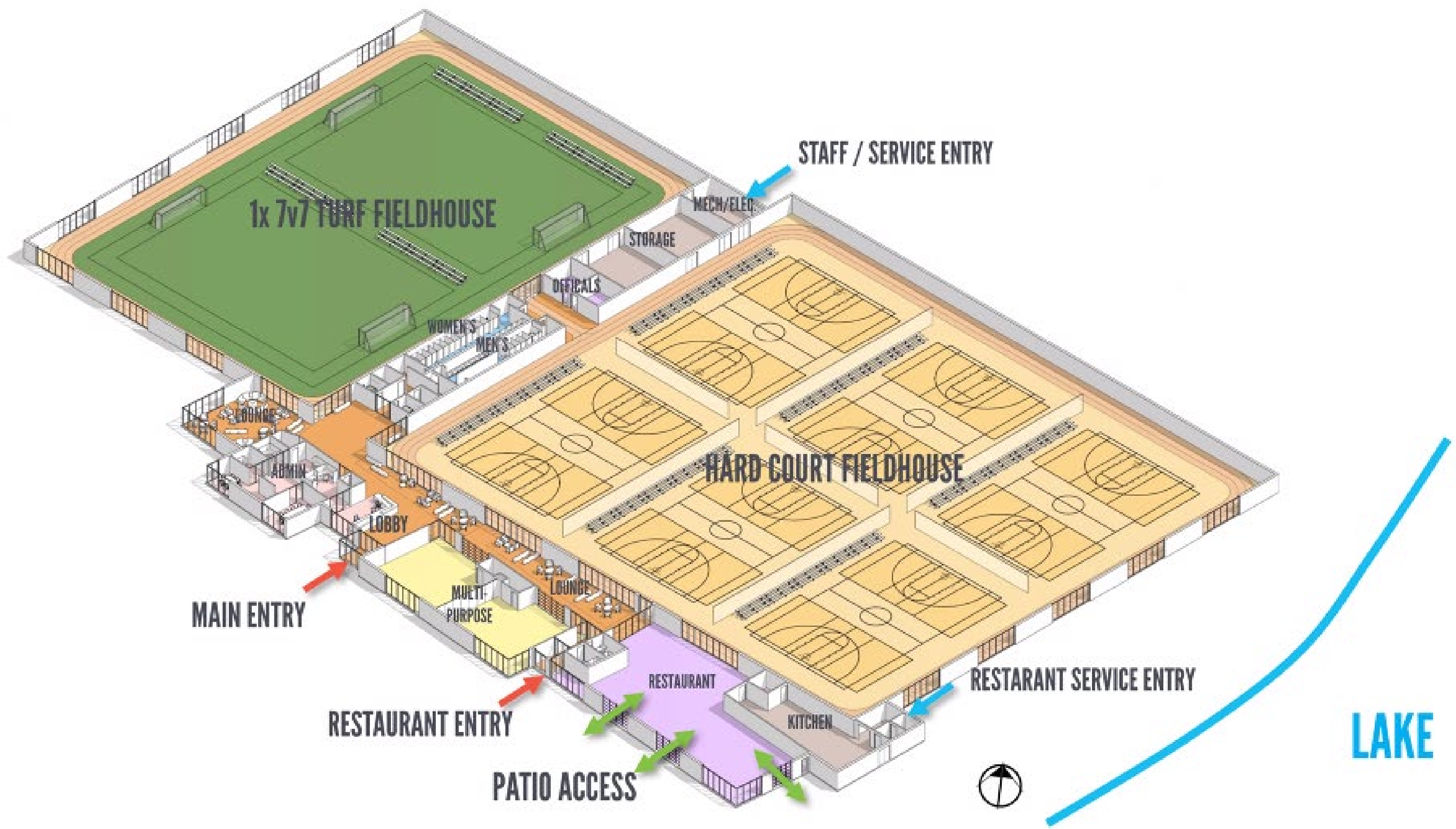


4. Proposed Program

Proposed Program

Overview

The site plan rendering at right depicts the proposed programming for the St. Charles Fieldhouse. As shown, there are 6 full-sized basketball courts that can be converted into 12 volleyball courts. This programming is the assumption Johnson Consulting utilized to project the economic and fiscal impacts in the following section of this report.



5. Economic & Fiscal Impacts

Economic & Fiscal Impacts

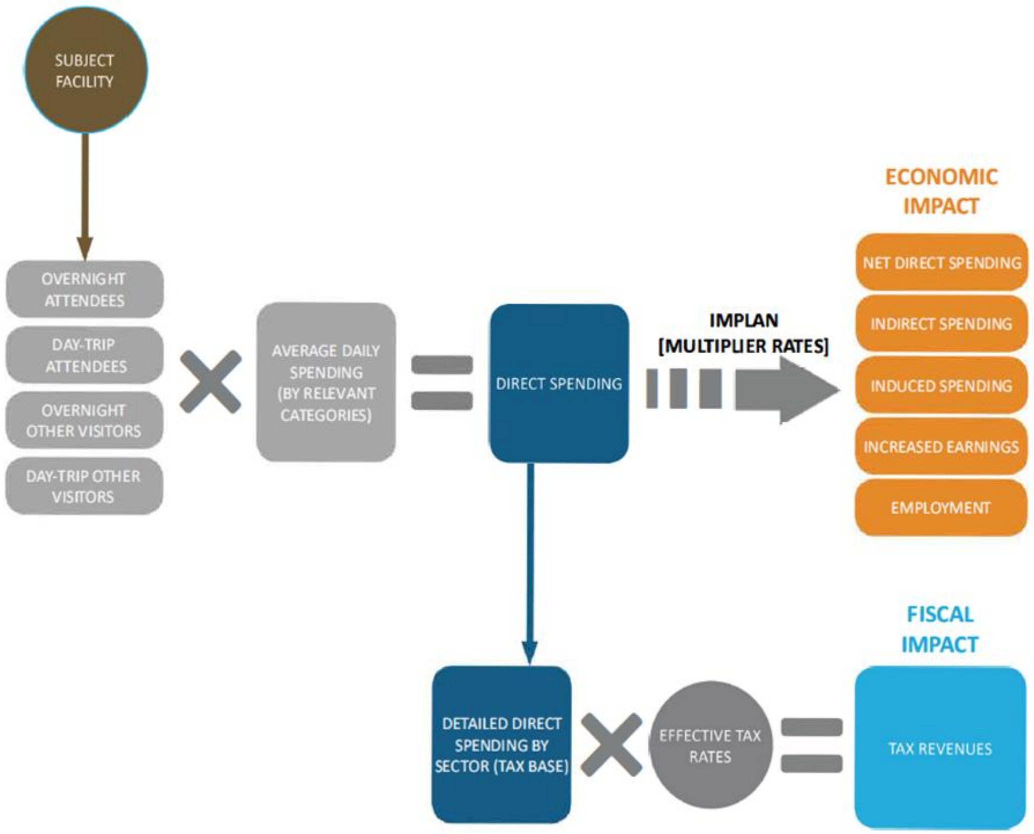
Definitions

Indirect spending, induced spending, increased earnings, and employment are estimated using a set of multiplier rates that are applied to the amount of direct spending. These figures are derived from an IMPLAN input-output model specifically purchased from IMPLAN Group, LLC. IMPLAN is a nationally recognized model commonly used to estimate economic impacts. An input-output model analyzes the commodities and income that normally flow through various sectors of the economy.

Economic Impact is defined as incremental new spending in an economy that is the direct result of certain activities, facilities, or events. The levels of impacts are defined as follows:

- Direct Spending – An expression of the spending that occurs as a direct result of the project being developed. For example, a visitor or participant's expenditures on hotel rooms, shopping and meals are direct spending.
- Employment – Measures the number of jobs supported in relation to the spending at the project. Employment impact is stated in the number of full-time equivalent jobs.

Fiscal Impact analysis measures the estimated tax revenues resulting from direct spending on certain activities, facilities, or events. For this analysis, fiscal impact estimates focus on major categories of tax revenues that are directly affected by a visitor's activity – general sales and use tax, transient occupancy (hotel/ motel) tax, and income tax.



Economic & Fiscal Impacts

Demand & Utilization Projections

Based on all of the observations, analysis, and conclusions in the preceding sections of this report, the proposed program is generally well-conceived and justifiable from a market perspective. St. Charles is well-located to attract regional demand that is not currently being met. Additionally, there is an undersupply of playing surfaces in the market, particularly hard surface courts.

To properly estimate potential demand and financials for the proposed program, Johnson Consulting relied on the operating and cost estimate projections developed by Ballard King in collaboration with BRS and the City of St. Charles Parks and Recreation Department. These projections for the operational budget as well as the proposed utilization were applied to the economic impact model developed by Johnson Consulting. In order to complete this task, we reviewed, researched, compared, and validated the existing demand and financial assumptions. These numbers were used as a base for Johnson Consulting's preliminary projections that are presented in this section. The business plan for the proposed venue currently has assumed 17 tournament weekend dates, that may vary by sports but primarily volleyball and basketball.

This information, in conjunction with the previous studies completed to date, was used to inform our assumptions for the proposed utilization as well as the corresponding revenue projections based upon the proposed program, and considering our market analysis of the local as well as regional demand.

Economic & Fiscal Impacts

Direct Spending

The table at right summarizes the estimated direct spending and annual sales resulting from the St. Charles Fieldhouse development. The spending and sales amounts correlate to the projected demand for the proposed facility at stabilization in Year 5.

As shown, the activity at the Fieldhouse is estimated to generate nearly 27,000 visitors on an annual basis, including players and spectators. Total spending at stabilization in Year 5 is estimated to be approximately $4.3 million, as a result of hotel stays, retail, dining, and other expenditures from visitors.

St. Charles Fieldhouse
Estimated Direct Spending by Tournament Visitors

		Assumptions	Year 5
	Visitation		
1	# of Tournaments		17
2	# of Teams per Tournament(avg)		45
3	# of Players per Team		10
4	# of Spectators per Team		25
5	Total Visitors		26,775
6	# of Visitor-Days	2.2 days of avrg stay	58,905
7	# of Room Nights		5,738
	Daily Spend		
8	Lodging	$30 / room night/person	$172,125
9	Meals and Incidentals	$25 / person-day	1,472,625
10	Retail	$20 / person-day	1,178,100
11	Fieldhouse Operations*		1,435,363
12	Total Daily Spend		$4,258,213

** BK projection operational expense in Year 5 stabilization*

Source: Jonhson Consulting

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Economic & Fiscal Impacts

Construction Impact

Prior to the opening of the St. Charles Fieldhouse development, the construction of the project will result in a one-time economic and fiscal impact. The table at right shows those impact estimates.

As shown, the estimated hard cost of development is approximately $53.7 million. Construction activity will result in 990 jobs, over $34.7 million in total spending, and $1.73 million in total fiscal impacts from Sales Tax. The project will also contribute 250 FTEs and $11.33 million in Increased Earnings.

St. Charles Fieldhouse
Estimated One-Time Construction Impact

	Multiplier or Tax Rate	Amount
Est. Hard Costs for Fieldhouse Complex		$53,724,000
Impact on Construction Jobs		
% of Costs Spent on Labor		55.0%
Labor Costs		$29,550,000
Average Construction Laborer Salary		$30,000
# of On-Site Construction Jobs		990
Economic Impact		
% of Costs Spent on Material		45.0%
Material Costs		$24,180,000
% Spent Locally		80.0%
Direct Construction Spending		$19,344,000
Indirect and Induced Spending	*0.80*	15,390,000
Total Spending		$34,734,000
Increased Earnings	*0.59*	$11,330,000
Employment (in FTE Jobs)	*12.9*	250
Fiscal Impact		
Sales Tax (State and Local)*	*8.950%*	$1,730,000
Total		$1,730,000

**Assuming that 10% of total spending goes to taxable corporate income of vendors.*
Source: Johnson Consulting

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