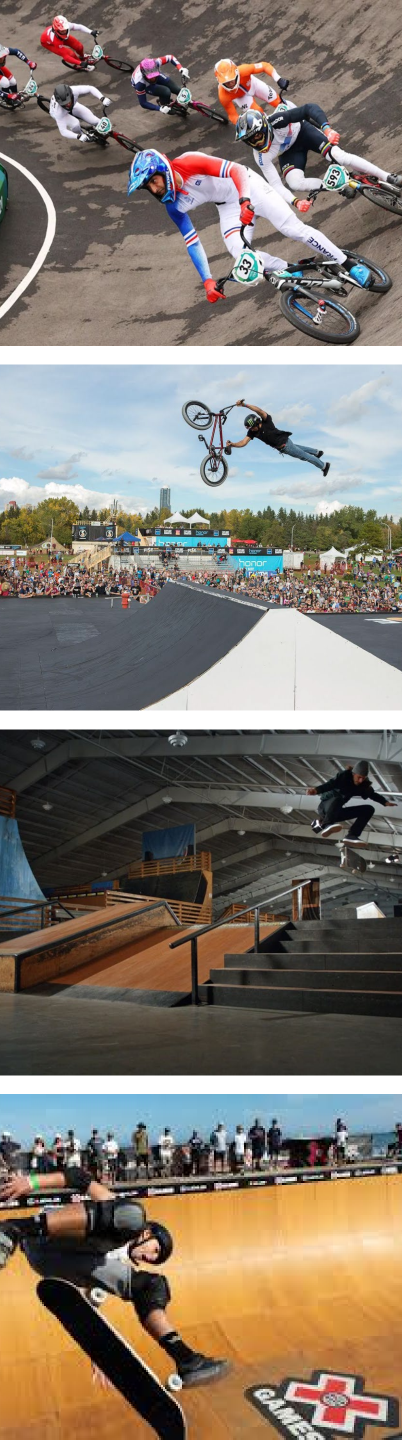

FEASIBILITY STUDY FOR AN INDOOR ACTION SPORTS COMPLEX

IN CENTRAL IOWA

FEBRUARY 7, 2025

CSL

February 7, 2025

Mr. Luke Hoffman
Executive Director
Iowa Bicycle Coalition
P.O. Box 5562
Coralville, Iowa 52241

Dear Mr. Hoffman:

Conventions, Sports & Leisure International (CSL) has completed a written report summarizing the results of a Feasibility Study for a potential Indoor Action Sports Complex in the Central Iowa region. The purpose of the Study is to assist the Iowa Bicycle Coalition (Coalition) and other stakeholders in evaluating key market, program, financial, economic impact, site, and funding aspects associated with a new Indoor Action Sports Complex development in Central Iowa.

The analysis presented in this report is based on estimates, assumptions and other information developed from industry research, data and certain assumptions provided by the Coalition, discussions with industry participants, surveys of potential facility users, industry trends data, and analysis of competitive/comparable facilities and communities. The sources of information, the methods employed, and the basis of significant estimates and assumptions are stated in this report. Some assumptions inevitably will not materialize, and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from those described and variations may be material.

The findings presented herein are based on analyses of present and near-term conditions in the Central Iowa area, as well as existing interest levels by the potential base of users for a new Indoor Action Sports Complex. Any significant future changes in the characteristics of the local community, such as growth in population, corporate inventory, competitive inventory and visitor amenities/attractions, could materially impact the key market conclusions developed as a part of this study.

This report has been prepared for the internal use of the Coalition and other related stakeholders and should not be relied upon by any other party. The report has been structured to provide the Coalition with a foundation of research to provide decision makers with the information necessary to strategically plan for Central Iowa's future in the action sports industries, with a focus on establishing and growing its competitive position in the evolving state and regional action sports industry and should not be used for any other purpose. This report, its findings or references to CSL may not be included or reproduced in any public offering statement or other financing document. We sincerely appreciate the opportunity to assist you with this project and would be pleased to be of further assistance in the interpretation and application of the study's findings.

Sincerely,

CSL International

CSL International

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CSL

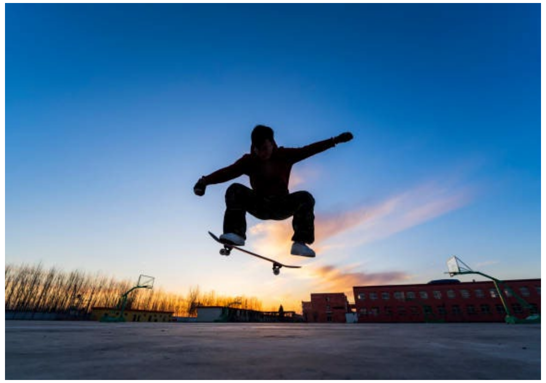
1 INTRODUCTION & BACKGROUND

INTRODUCTION

Since the 1980s, action sports such as BMX and skateboarding have evolved from youth hobbies into globally recognized sports, supported by their inclusion in events like the Olympics and the establishment of professional leagues. Action sports are defined as high-energy, non-traditional activities often associated with individual expression and skill progression. They include BMX, skateboarding, mountain biking, and other sports that blend recreation, competition, and lifestyle. This evolution has spurred the development of purpose-built facilities designed to accommodate the unique needs of these activities, reflecting their growing cultural and economic significance.

Central Iowa has witnessed steady growth in action sports, particularly due to its BMX and skateboarding assets. Developing an Indoor Action Sports Complex would not only extend action sport participation in Central Iowa throughout the calendar year but also have the potential to attract regional and national events, further reinforcing the area's economic growth and identity as a leading sports tourism destination in the Midwest.

Against this backdrop, the Iowa Bicycle Coalition retained Conventions, Sports & Leisure International (CSL) to conduct a feasibility study of a potential new Indoor Action Sports Complex in the Central Iowa area. The purpose of the study is to assist the Coalition and other stakeholders in evaluating key market, program, financial, economic and ownership/management aspects of a potential new Indoor Complex that would host BMX, skateboarding and potentially other extreme/action sports activities. The full report should be reviewed in its entirety to gain an understanding of analysis methods, limitations and implications.



1 INTRODUCTION & BACKGROUND

STUDY PARTNERS AND FUNDING

Nearly 20 diverse organizations, spearheaded by the Iowa Bicycle Coalition, contributed to the funding and support of this Study. These key Central Iowa stakeholders recognize the potential of an Indoor Action Sports Complex to enhance the area's quality of life and sports tourism industry. Their active involvement was crucial to the Feasibility Study and will continue to be vital in advancing the vision of this potential project in Central Iowa.

1 INTRODUCTION & BACKGROUND

STUDY PROCESS

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

- PROJECT EXPERIENCE: Experience garnered through more than 1,000 sports, convention, hotel, exposition, and other event and hospitality facility planning and benchmarking projects in communities of all sizes throughout the country.
- EXISTING CONDITIONS: Review of the current and evolving conditions of the Des Moines metro area and surrounding regional marketplaces, including analysis of 10 competitive indoor skate and bike facilities in the state and nearby region.
- COMPARABLE ANALYSIS: Benchmarking analysis of 22 comparable bike, skate and multi-sport facilities and markets throughout the country, with a focus on facility features, market characteristics, and surrounding destination amenities.
- INDUSTRY TRENDS: Detailed evaluation of micro and macroeconomic trends in the bike and skate industries.
- SITE VISIT, INTERVIEWS & OUTREACH: Completed a multi-day site visit for tours and meetings with 29 key stakeholder organizations. Detailed telephone surveys were completed with representatives of potential user groups, including tenants, event organizers, and program creators related to bike and skate. In total, outreach efforts consisted of more than 20 interviews of regional and national event/program organizers who collectively represent more than 50 total events per year.

INTERVIEWED STAKEHOLDERS

Extensive in-market interviews were conducted with a diverse cross-section of stakeholder organizations, including organization leaders and decision-makers from local government, economic development entities, community organizations, and businesses that could influence and/or be impacted by a new Indoor Action Sports Complex in the Central Iowa region. In total, more than 50 individuals across 29 organizations were interviewed. This research provided insight into Central Iowa's existing strengths and challenges as a destination for action sports and helped inform the potential development of an Indoor Action Sports Complex. The organizations that participated in this process are listed below.

80/35 BMX	Dave Stow	Polk County
Accu-Steel	Des Moines Downtown Chamber	Polk County Conservation
Axios	Des Moines Street Collective	RAGBRAI
BikeIowa	Des Moines Wolfpack	RDG Design
Bike World	Dream Team	Skate DSM
Catch Des Moines	Iowa Bicycle Coalition	South Ridge Mall
CITA - Central Iowa Trail Association	Kittie Weston-Knauer	Team Velarosa
City of Des Moines	Krause+	Valley West Mall
City of Pleasant Hill (Mayor)	Merle Hay Mall	Voss Distribution
City of West Des Moines	MidAmerican Energy Company	

Feedback provided by these stakeholders was crucial in identifying key strengths and areas for improvement in Central Iowa as a destination for action sports events and facilities. This input shaped the direction of subsequent study tasks, allowing for a thorough examination and analysis of local, comparable, and other market demands. Key feedback provided by these entities is summarized on the following page.

KEY STAKEHOLDER TAKEAWAYS

As mentioned previously, CSL interviewed over 50 individual stakeholders across 29 community organizations including the local tourism industry, City and County governments, economic development entities, local businesses, and hotels. These interviews led to eight primary takeaways related to the potential development of an Indoor Action Sports Complex in Central Iowa. These primary takeaways include the following:

1. Unique Local Biking Culture: Central Iowa is home to a rich biking culture, supported by numerous trails, community organizations, and events like RAGBRAI, which attracts cyclists from all over the world. This strong, established biking identity aligns well with the proposed facility, enhancing its potential to become a regional destination for both local and visiting cyclists.
2. Momentum From Skatepark: The successful launch and popularity of Lauridsen Skatepark, which draws national attention and events, demonstrates demand for action sports facilities in the area. Building on this momentum, an indoor complex could offer year-round opportunities and support other wheeled sports.
3. Support for a Leading, Multi-Use Action Sports Facility: Stakeholders have expressed a desire for a facility that caters to multiple disciplines within action sports, including BMX, mountain biking, skateboarding, and rollerblading, among others. Creating a comprehensive, multi-use venue could attract a wide audience and serve as a central hub for wheeled sports in the region, appealing to both serious athletes and casual participants.
4. Successful Sports Tourism Destination: With Des Moines already established as a popular destination for sports tourism due to its central location, affordable accommodations, and thriving sports culture, an Indoor Action Sports Complex could attract additional visitors year-round. This would not only contribute to the local economy but also support Central Iowa's position as a Midwest hub for unique and diverse sports experiences.
5. Opportunity for Youth Development: The proposed facility presents a unique opportunity to engage youth in healthy, confidence-building activities. Many stakeholders envision educational programs integrated with cycling, skateboarding, and other wheeled sports, promoting STEM skills, physical health, and community engagement, especially among underrepresented groups.
6. Funding Questions: There are significant discussions about the potential funding sources for the facility, including corporate sponsorships, private donations, and public sector support. While there is local interest, securing sustainable funding may require a coalition of stakeholders and a robust plan that demonstrates the economic and social benefits of the project.
7. Need for Inclusivity and Accessibility: Stakeholders emphasized the importance of ensuring accessibility and inclusivity for underserved groups in the community. This includes features like loaner equipment, affordable membership options, and programs tailored to various skill levels, ensuring the facility is welcoming and accessible to all.
8. Integration with Existing Trail and Transport Networks: The proposed location should ideally connect with the area's extensive, multi-use bike trail and public transportation systems, which would maximize its accessibility and support eco-friendly transportation initiatives. Siting the Complex to serve as a hub for a bike, hike and cross-country ski trail network would enhance its appeal to action sports and recreation enthusiasts, thereby attracting greater foot traffic and generating greater revenue.

LOCAL AND REGIONAL CONDITIONS

2 LOCAL & REGIONAL CONDITIONS

DES MOINES TRAILS

Central Iowa's extensive bicycle and related infrastructure underscores the region's commitment to active transportation and recreation, making it a important consideration in planning for an Indoor Action Sports Complex. The following chapter details analyses of critical local market characteristics relative to the potential success of an Indoor Action Sports Complex's potential success in Central Iowa. Central Iowa's robust network of bike trails provides a foundational asset for the development of an Indoor Action Sports Complex, reflecting a community that values and supports biking culture. The extensive infrastructure, with over 200 miles of paved trails in Des Moines and over 520 miles throughout Polk County, fosters a strong biking community that enables riders to traverse much of the area without using a car. This infrastructure not only encourages local biking but also attracts out-of-town cyclists, contributing to a thriving bike and action sports tourism sector.

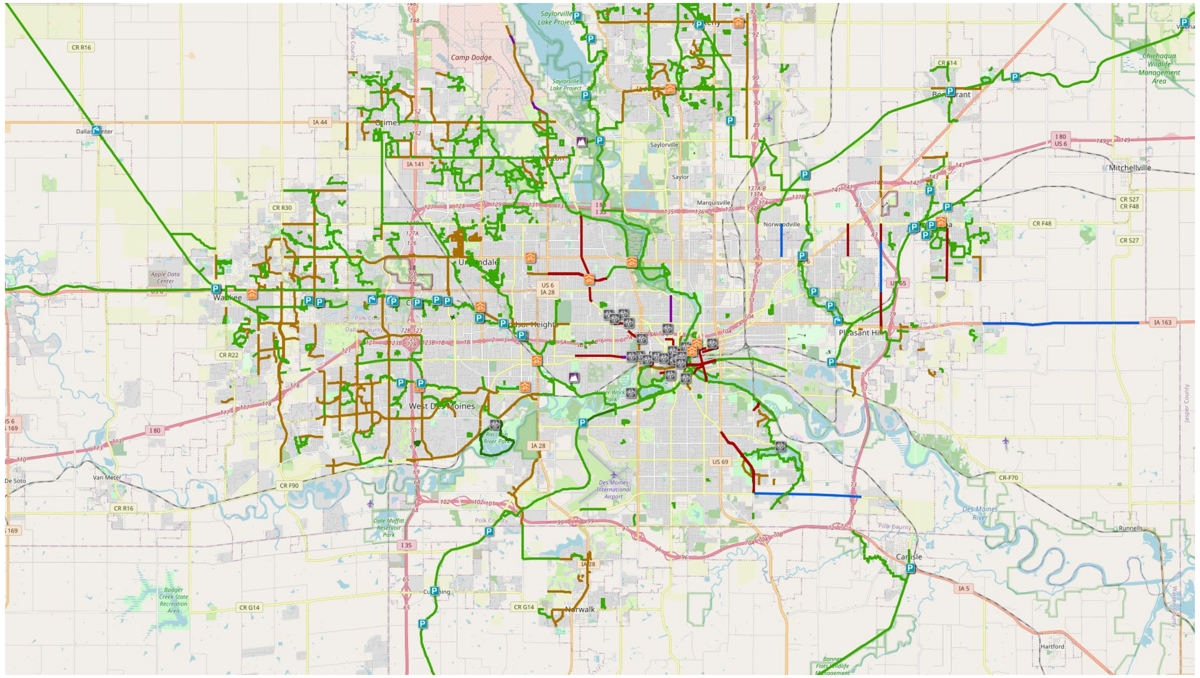
The proposed Indoor Complex could leverage this established network by positioning itself as an all-weather extension of this infrastructure. By serving as a destination within the network, the indoor facility could provide year-round activities, attract a wider audience from the cycling community, and complement local amenities such as dining and recreational attractions along the trails that enhance the overall visitor experience.

MAP LEGEND

- 🟩 Trail/ Shared-Use Path (Paved)
- 🟩 Trail/ Shared-Use Path (Unpaved)
- 🟥 Bicycle Lane
- 🟫 Side Path
- 🟦 Paved Shoulder
- 🟪 Separated Bike Lane
- Bike Rental
- P Trail Head
- Bike Shop
- Water Fountain

526
miles of trails in
Polk County

212+
miles of trails in
Des Moines



Source: Iowa Department of Transportation, 2024.

2 LOCAL & REGIONAL CONDITIONS

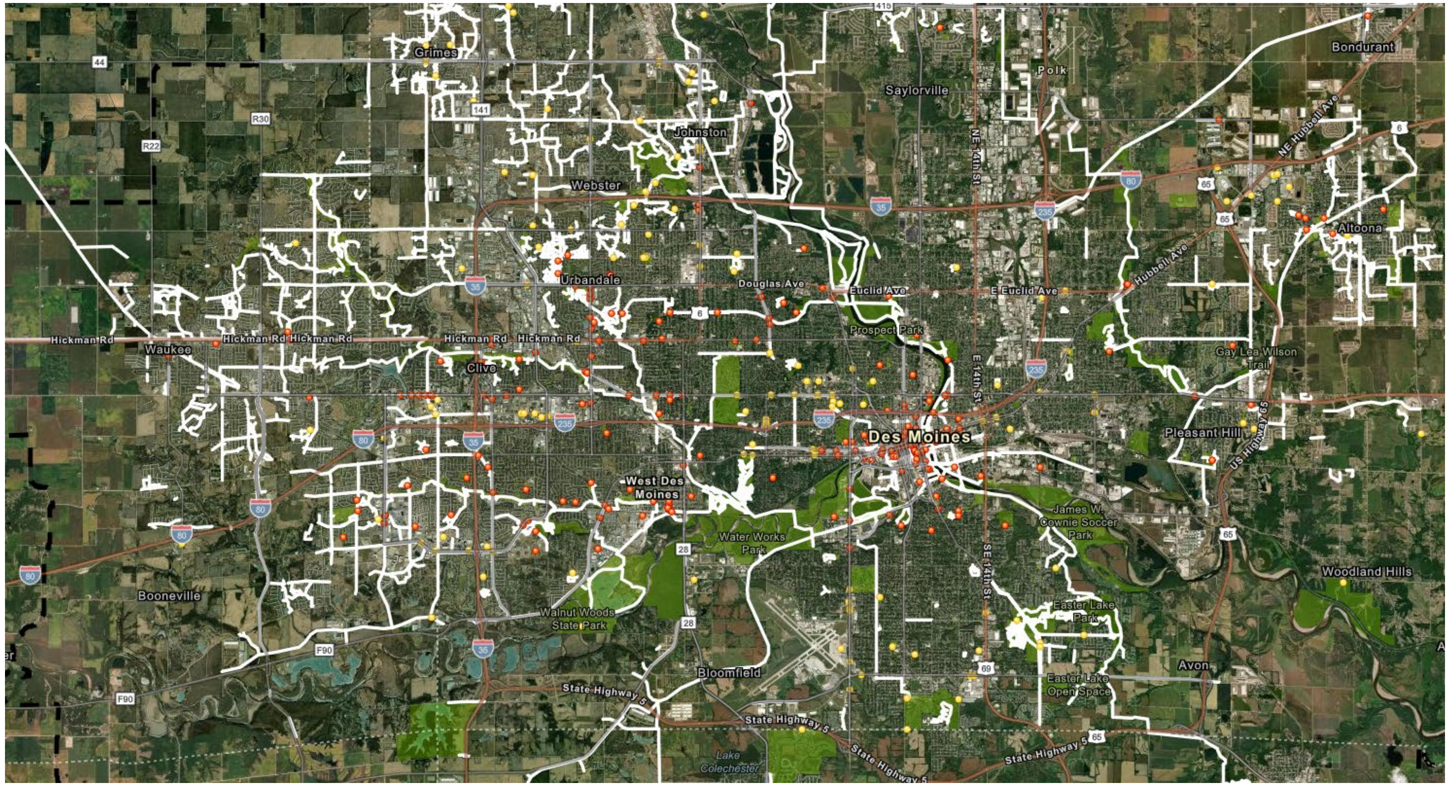
TRAIL MAP + RESTAURANTS & ATTRACTIONS

The map below focuses specifically on the integration of Central Iowa's trail network with over 100 on- and off-trail dining and attraction amenities, highlighting the symbiotic relationship between the trail system and the region's hospitality and social infrastructure. Unlike the previous map, which showcased the breadth and variety of the trail network itself, this map emphasizes the experiential opportunities available along the trails, showcasing how a potential Indoor Action Sports Complex could tap into and enhance this established bike-and-hospitality ecosystem. The vibrant network supports both recreational and social experiences for cyclists and trail users, reflecting the area's bike-friendly nature and suggesting seamless integration with a potential Complex.

MAP LEGEND

- ▬ All Trails
- ● On-Trail Restaurant/ Attraction
- ● Off-Trail Restaurant/ Attraction

100+
restaurants and
attractions along trails

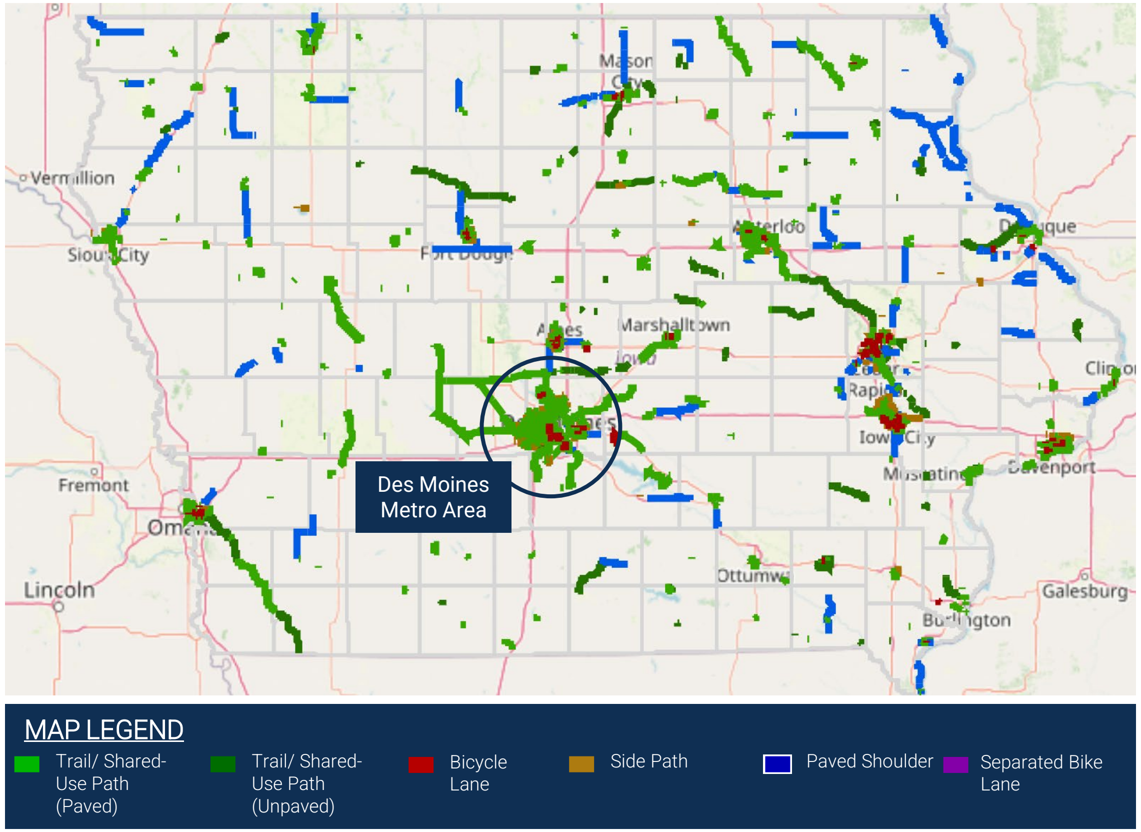


Source: Des Moines Area Metropolitan Planning Organization, 2024.

2 LOCAL & REGIONAL CONDITIONS

STATE OF IOWA TRAILS

It is also useful to consider how an Indoor Action Sports Complex may integrate with a broader regional trail network. Iowa's extensive network of trails and over 90 bike shops statewide underscores a strong biking community that may be interested in using a potential new Complex. However, the bike shop industry faces challenges, including high market saturation, the presence of online retailing, and limited support, which have made it increasingly difficult for bike shops to remain operational, leading to closures for some companies in recent years. As shown below, Central Iowa boasts the highest concentration of trails in the state, making it a natural hub for cycling and wheeled sports in Iowa. Additionally, there is a notable opportunity for linking trail systems between major cities, enhancing Iowa's appeal as a destination for outdoor recreation and action sports.



In-State Bike Shops		
Ace Bike and Fitness	Creekside E-bikes	Nick's Cycling and Fitness
Albrecht Cycle Shop	Day 6 Bicycles	Northtowne Cycling and Fitness
All Ability Cycles	Decorah Bicycles	Pedal and Play Sports
Back Alley Bikes	Dimond Bicycles	Pedego Iowa City
Beaverdale Bicycles	eBike Iowa	Pritchard EV
Ben's Bicycles	Erik's Bike and Ski	Rasmussen Bike Shop Altoona
Bickel's Cycling & Fitness	EVI - Electric Vehicles of Iowa	REI West Des Moines
Bicycle World	Extra Miles Ebikes	Riverside Cyclery
Big Barn Harley Davidson	Free Flight Bikes	RynoVelo Bike Shop
Bike Central	Geoff's Bike and Ski	Scheels All Sports - West Des Moines
Bike Cock Bike Shop	Goldfinch Cyclery	Scheels All Sports Cedar Falls
Bike Tech	Hall Bicycle Company	Scheels All Sports Coralville
Bike World Ames	Hall Bicycle Company	Scheels All Sports Sioux City
Bike World Clive	Happy Trails Cycle	Skunk River Cycles
Bike World Urbandale	Harper's Cycling and Fitness	Spoken Wheel Cyclery
Bike World West Des Moines	Healthy Habits	Street Collective
Bikes Boards & Shades	ICHI Bike	Sugar Bottom Bikes
Bikes to You	Iowa Bike Co	The Bicycle Station
Black Tire Bicycle Company	Iowa City Bike Library	The Bike Farm Iowa
Bojebikes	ISEC Bike Shop	The Bike Shack
Boone Cycles	Jerry & Sparky's Bicycle	The Broken Spoke
Breda Depot and E-bike Rental	Kyle's Bikes	The Okoboji Cyclist
Briar Ridge Bikes	Kyle's Bikes E 1st St	The Ride Bike Shop
Brothers Bike Shop	Kyle's Bikes Waukee	Trailside Rentals
Buscher Bros Corporation	Lakeshore Cyclery & Fitness	Trek Store Davenport
Cedar Valley Bicycle Collective	Local Spokes	Walker's Bike Shop
Central Iowa Mopeds & More	Modern Bike	Waterloo Bicycle Works
Chain and Spoke	MOJO Cycling	Wayne's Ski & Cycle
Chain Reaction Bike Hub	New Way Auto	World of Bikes
Circle 8 Cyclery	Newy's Moto	Xtreme Wheels Bike & Sports
Connecticut Yankee Pedaller		

Source: Iowa Department of Transportation, Iowa Bicycle Coalition, 2024.

2 LOCAL & REGIONAL CONDITIONS

CASE STUDY - RAGBRAI

RAGBRAI (State of Iowa)

The strength of Iowa's biking culture is further demonstrated by RAGBRAI (Register's Annual Great Bicycle Ride Across Iowa), the world's oldest, largest, and longest recreational bicycle touring event. Founded in 1973 by Des Moines Register reporters John Karras and Donald Kaul, the event began as a casual ride with just a few hundred participants and has since evolved into a week-long journey that attracts approximately 15,000 riders each year. Open to cyclists of all skill levels, RAGBRAI includes over 15 equipment charters and more than 320 clubs and teams, drawing a diverse group of recreational cyclists, families, and experienced riders. Each year the route varies, but it traditionally begins at Iowa's western border along the Missouri River and ends at the eastern border along the Mississippi River, allowing participants to experience the hospitality, culture, and landscapes of small towns across the state.

RAGBRAI's impact extends beyond the riders; it generates a significant boost in tourism for Iowa, as towns along the route experience an influx of visitors who engage with local events, meals, and festivities hosted by community organizations and residents. In 2022, the event was estimated to contribute $25 million to the state's economy, much of which directly benefited small towns and non-traditional tourism areas across Iowa. This event not only showcases Iowa's warm hospitality but also positions the state as a major player in the world of recreational cycling, strengthening Iowa's identity in the global biking community.

A world-renowned event like RAGBRAI aligns well with potential visions for an industry-leading Indoor Action Sports Complex in Central Iowa, and together, both assets would reinforce Iowa's reputation as a premier destination for wheeled sports.

RAGBRAI Teams and Clubs

Tall Dogs	Boston boys	Duval Dogs	iwanttoridemybicycle	Pechman
Velorosa	Bow Wow Hot International Bike Club	Dzhauskin	Jande's Adventure Club	Pedal Faster
Team Cow	BRAT Big Adventures	Eat Lightning	Just Keep Cycling	Pella Cycling Club
DSM Wolfpack MTB Club	Breakfast Club	EconoBRAI	KCV	Pfleger queens
Quad Cities Bike Club	Breit Bikes	Emily's Honor Ride	Keokuk Bike Club	Piddle Paddlers
Lake Country Cyclists	Broken Spoke	Escape From New York	Knuckleheads	Pie me up, Scotty
Decorah Area Mountain Bike Club	Brompton Babes	EssXpress	Krusty Nuggets	Pilderwasser
DBQ Scholastic Racing	Bronco Betties	Evergreen Team	Lady London and the Rumble Strippers	PingPong PedalOn
Iowa CIty Mountain Bike Club	Brookline Bike Hounds	Fast & Cool	Last Hill	Pocono Peddlers
Mason City MTB Club	Buckeye Coasters	Fat Lad At the Back	Leprechaun	Podunk Hustlers
Muscatine Youth MTB Club	BUFF RIDERS	Fat Tire	Live Oola	Ponzo Pacers
North Scott MTB Club	Buffalo Lodge Bicycle Resort	Fensterer Gates Cycling	Livestrong	PowerBottoms
Quad City Area Youth MTB Club	Burnin' Heine's	Flat Road Sherpas	Lollygag Reflex	Powered by Plants Cycling
4 Cs Adventures	Cal SLO and Steady	Flying Burrito Brothers	LongBeachCA	PowerHaus
Aardema Cycle Therapists	California Dreamin';	FOMO	LOON	Prinzenbad Boys
Abbott	Camino de Luna	Four score and free beer ago	Lord of the beaRings	Puck It
Achin Knee From Ankeny	Campisano Partners	FTL	Lost and Found Adventures	Quad Cities Bicycle Club (03)
Adaptive Sports Iowa(202)	Canada US Biking Blue Hens	Full Throttle	Louie Louie	Quotes
Adirondack Garda	Canadian Lemmings	FVBSC	Lovely Days	Ra-Cha-Cha
Aero Die Manic	CF Cyclist	Gains Down in Africa	MacTandem	Ragbrai Virgins
AGAINST THE WIND	Chafing The Dream	Gamla Stan	Magnum Thunder	Rawhide Riders
Air Force Cycling Team(44)	Chaos	Gears Across Fields	Mahler	Real Team Waldo
Almost There	Charm City Cycles	Gears N Beers	Major Taylor Minnesota	RecVehRims
Amana Bike Beer & Bratwursts	Chasing Beer 24	Geaux Tigers	Makin Bacon	Red Dirt Roadies
America	CHBFT	GenX Derailled	Marion - CR Road Hogs	Red, White and Canadian
Angel Eric	Cheddar's Revenge	GenX Twin Cities	Matty Merritt's sexy little army	Redding Riders
Anti-Carbon Coalition	Cheekun	Gilroy Grinders	Maybe Next Year	Ride Backwards
Anti-Carbon Coaltion	Chillin' Family - Gagnier-Antle-Hadian-Curry-Stewart	Go the Distance Cyclists	Memphis Cycle Club	Ride Long & Beer Bong
ApostropheS	Chuck's Kids	GoBanana!	mental floss	Ride On
Are We There Yet?	CLA	Goddesses Riding Across Cornfield Expeditions	Metz	Ride till I'm 50
Argo - RiverBend Bicycle Club	Clydesdale Cycling	Gone In 60 Seconds	Microgreen Diet	Ride with Art
ARIZONA RIDERS	CMC Riders	Good Beer	Mile High Life	RIDE-RINSE-REPEAT
Arizona Road Runners	CollisonClan	Goofy Goobers	Miles and Smiles	Road Climbers
Arizona Sidewinders	Cookies & Quinoa	Goon Squad	Minnesota Bikings	Rocky Mountain High
Auf Gehts	Cornell College Team RamBRAI	Gray Duck	Mission Without Borders	Rolling Stars
Aussie Aussie Aussie	Cosentino Cousins	Great Beer Now	MOB	ROTR
Aussies Abroad	Crank Arm	Griffin's Friends	Moehn Brew Crew	Saco River Riders
B I K E Army	Cranked bike studio	Grogan	Montamos Bicicletas	Salt and Pepper
Bad Boys Consulting Partners	Crash Dummies	Groucho	Montezuma's Revenge	Sanctuary Spokes '24
Bad Donkey Cycling Club	Crazy Coots	Grumpy old men	Morette Madness	Saratoga Renegades
Bag of Change	Cronbaugh	Grupetto	Moving Violations	SBS
Baptismal Catfish	Crop Inspectors	Handlebar Bicycle Club	MPMBA/ TAKUSA	Schwabsters
Barking Spiders	Crossroads Cycling	Hawkeye Bicycle Association	Muffys	Scratch B
Barnick Ridiers	Cruizin260	Hawkeye Spin	My Bike, My Choice	Searching for AC
Bart's Bandits	CUBS Chicago Urban Bicycling Society	Hazak	Naples Ski Club	Seersucker Cyclist
BBB Adventures	Culte Cycliste	High Rollers	Natural State Rollers	Sibling Rivalry
Beers for Breakfast	Cycopath	hiher ryde 51	Nautical Wheelers	Sinners and Saints Cycling
Bella Vida	Dad & Peter	Hillbillies on bikes	nehring	Siouxland Cyclists
Bemclan	De La Soul	Hills Angels	Neighborhood House Association Peoria, IL	Skabengas
BeUMC	Deer Hart	Hills In Motion	Newbie 2024	SLAM
Bicycle Race	Defcon5	Hobo Rocket and Rockettes	Newbie 61	Slow Riders
Bicyclists of Iowa City	Des Moines Cycle Club	Hobos For Hire	NICE BUTT	SlowRida
Big Bloob	Desafinado	Hooks Family	No Complaints	Snap Crackle Pop
Big Gear Girls	Diddly Squat	hotlegs	No Name Bike Club(52)	Snapperheads
Bike Bitches	Doctors Without Order	Houston's	Norm's EF2	Sobchak Cycling
Bike Burlington (11)	Doggie Crew	Huff N Puffers	North IOWA TOURING CLUB	Solo Pat
Bike for MS Awareness	Doggone Cycling	HumB	Not Well Bitch	Southern Indiana Wheelmen
Bike, Brews & Beats	Dombrowski	Hydration Beats Talent When Talent Fails to Hydrate	Official University of Iowa Team	SpineOne
Bikeparty does RAGBRAI	DOT Bicycle Club (10)	I thought this was a day trip	OFFS	Spirit Riders
Bikes Beers Bitches	Doug	IC Rollers	Often Wrong But Never In Doubt	Spoke Folk
BikesandbrewsLi	Dream Team	IlBeBack	Ol Yellar	Spokebusters
Birthday Buddies	DreamsN2Memories	Impact	On Your Left	
Black and Tan Bikers	Drink Drank Drunk	Into the Beyond	One and Done	
Black Betty	Dubuque Bike Club	Iowa Specialty Hospital	One more And We Gotta Go	
BOHICA	Duval Derailleurs	Is that a sprocket in your pocketâ€¦	PAHAFFEY Riders (77)	

RAGBRAI CHARTERS

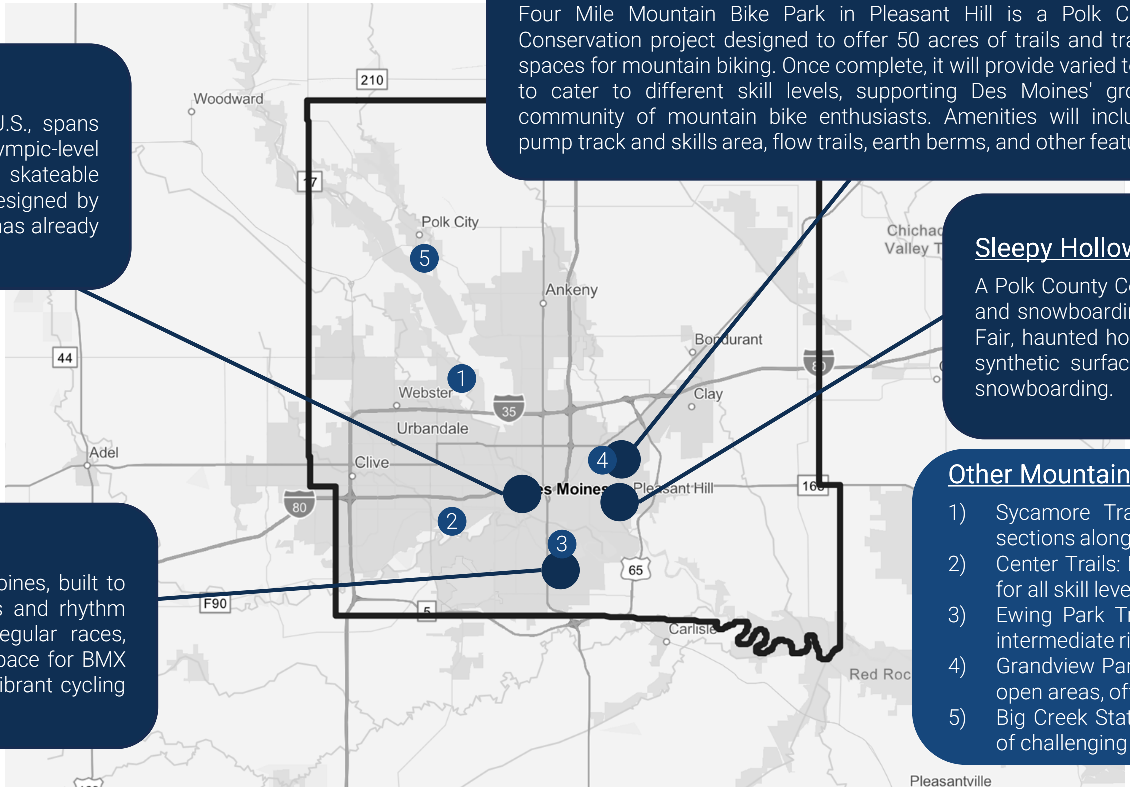
Anywhere Cycling Experience	Bikes to You	Lost & Found Adventures	Padre's Cycle Inn	Quad Cities Bike Club
Bicycle Illinois	Brancel Charters	North Iowa Touring Club	Pedaling Pandas	Riverbend Bicycle Club
Bicyclists of Iowa City	Cedar Valley Cyclists	Out-Of-Staters	Pork Belly Ventures	Ron Oman Charters
Bike World	Central Iowa Charters			

Source: RAGBRAI, News Publications, 2024.

2 LOCAL & REGIONAL CONDITIONS

LOCAL ACTION SPORT FACILITIES

Central Iowa has an existing inventory of existing action sports facilities at Lauridsen Skatepark, 80/35 BMX, Sleep Hallow Sports Park, the upcoming Four Mile Mountain Bike Park, and various other mountain biking trails. A new Indoor Complex would importantly complement these facilities by offering year-round availability, driving interest and engagement in BMX, skateboarding and other action sports throughout all four seasons. Brief summaries of each of these facilities are provided below, followed by greater detail regarding Lauridsen Skatepark and 80/35 BMX on the following page.



Lauridsen Skatepark

Lauridsen Skatepark, the largest open skatepark in the U.S., spans 88,000 square feet along the Des Moines River and offers Olympic-level features like competition bowls, street elements, and skateable sculptures. Opened in 2021, this free public space was designed by California Skateparks to cater to skaters of all abilities and has already hosted major national competitions and tours.

80/35 BMX

80/35 BMX is a community-driven BMX track in Des Moines, built to USA BMX standards with features such as start gates and rhythm sections. Operated by volunteers, the facility hosts regular races, clinics, and practice sessions, providing an accessible space for BMX riders of all skill levels and contributing to the region's vibrant cycling community.

Four Mile Mountain Bike Park (Planned)

Four Mile Mountain Bike Park in Pleasant Hill is a Polk County Conservation project designed to offer 50 acres of trails and training spaces for mountain biking. Once complete, it will provide varied terrain to cater to different skill levels, supporting Des Moines' growing community of mountain bike enthusiasts. Amenities will include a pump track and skills area, flow trails, earth berms, and other features.

Sleepy Hollow Sports Park (Partially Complete)

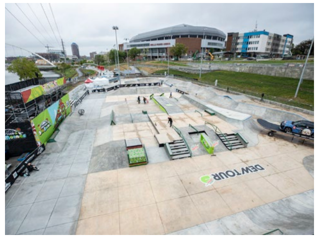
A Polk County Conservation Project that currently offers tubing, skiing, and snowboarding and hosts community events like the Renaissance Fair, haunted houses, and others. It plans to add a SnowFlex slope, a synthetic surface capable of offering year-round tubing, skiing, and snowboarding.

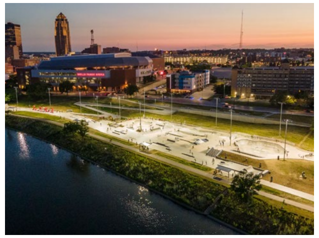
Other Mountain Biking Opportunities

1) Sycamore Trails: Offers a wooded singletrack with technical sections along the Des Moines River.
2) Center Trails: Features diverse terrain and well-maintained loops for all skill levels.
3) Ewing Park Trails: Flowy trails and gradual climbs, perfect for intermediate riders looking for a scenic ride.
4) Grandview Park Trails: Compact trails with a mix of wooded and open areas, offering short but engaging rides.
5) Big Creek State Park: Features well-maintained trails with a mix of challenging climbs and smooth singletrack.

Source: Facility Sites, Facility Management, News Publications, 2024.

LOCAL STAKEHOLDER CASE STUDIES





Lauridsen Skatepark (Des Moines, IA)

Lauridsen Skatepark, located along the Des Moines River, is the largest skatepark in the United States, covering 88,000 square feet. Opened in May 2021 after over a decade of planning and fundraising, the park was made possible through a combination of private donations, public support, and grants totaling $6.1 million, with major contributions from the Lauridsen family, Skate DSM, and the Community Foundation of Greater Des Moines. The skatepark was designed by California Skateparks and features amenities for all skill levels, including a 15-foot competition bowl, multiple street-style elements, rails, ledges, and a flow bowl, creating a versatile environment for both professionals and casual skaters. The park's public access, free admission, and year-round usability (weather permitting) have made it a central gathering spot for residents and visitors alike.

Since its opening, Lauridsen Skatepark has attracted national and international attention, notably hosting the 2021 Dew Tour. This high-profile event drew athletes and spectators from across the country, boosting local tourism and generating economic activity for nearby businesses. The Skatepark highlights Des Moines' growing reputation as an action sports destination. By fostering a welcoming community space and hosting prominent events, the skatepark has established a blueprint for how an Indoor Action Sports Complex could thrive in the region, supporting a diverse audience and reinforcing the area's commitment to accessible, high-quality action sports facilities. Based on data from Placer.ai, in 2023 the track attracted 31,000 unique visitors comprising 114,700 visits with 13.15 and 10.34 percent of visitors hailing from over 50 and 100 miles away, respectively. A visitor is defined as a person who visited the facility for 10 or more minutes.

80/35 BMX (Des Moines, IA)

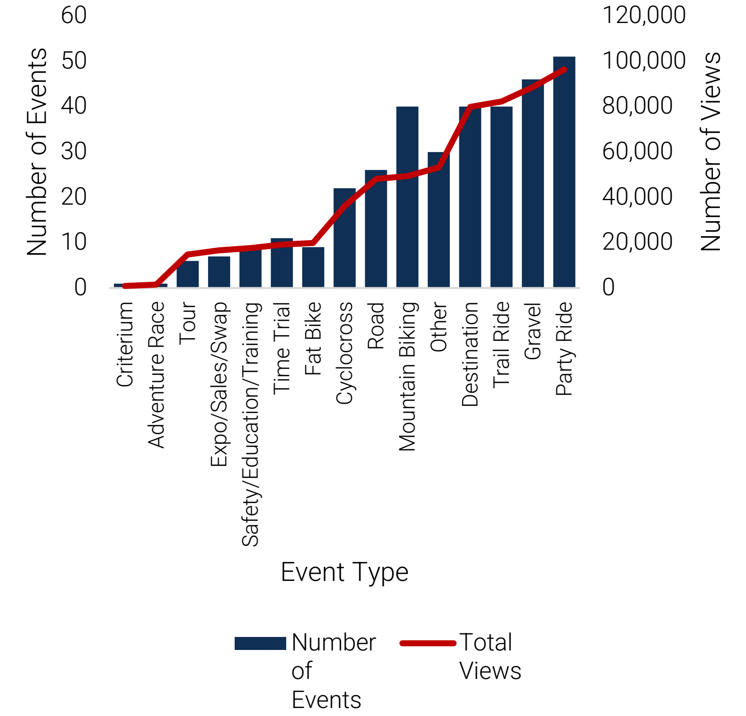
80/35 BMX is a prominent BMX track located near the intersection of I-80 and I-35 in Des Moines. It is designed to meet USA BMX standards with features such as a start gate, rhythm sections, and jumps that challenge riders of all skill levels. Operating as a non-profit, community-driven organization, the track relies heavily on a dedicated volunteer base and funding from public and private sources, including local businesses and community donations. In 2024, the track hosted 74 events over 36 weeks, including 31 local races (60 average riders per race), 22 practice sessions (17 average riders per session), and 17 beginner league sessions (31 average riders per session). Two state races attracted an average of 172 riders each, including participants from eight states. The facility's beginner league program, offering six weeks of coaching exclusively for beginners, has proven highly effective at introducing new riders to the sport. The track boasts 200 memberships, representing a significant portion of Iowa's 325 total BMX memberships, and consistently attracts participants from across the Midwest. Placer.ai data reveals 3,400 unique visitors in the past year, accounting for 12,100 total visits, with 6.41 percent and 5.79 percent of visitors traveling from over 50 and 100 miles away, respectively.

Volunteers are the backbone of 80/35 BMX operations, contributing approximately 2,400 hours annually. Events typically require 12-16 volunteers, while practices run with two to four, and track maintenance, especially following heavy rains, demands 20-40 hours of labor from crews of two to six people. The track's location near major highways enhances accessibility, while its community-centered approach underscores Des Moines' enthusiasm for action sports. 80/35 BMX exemplifies how a strong volunteer network and community support can drive the success of action sports, offering a model for how an Indoor Action Sports Complex could succeed in the area.

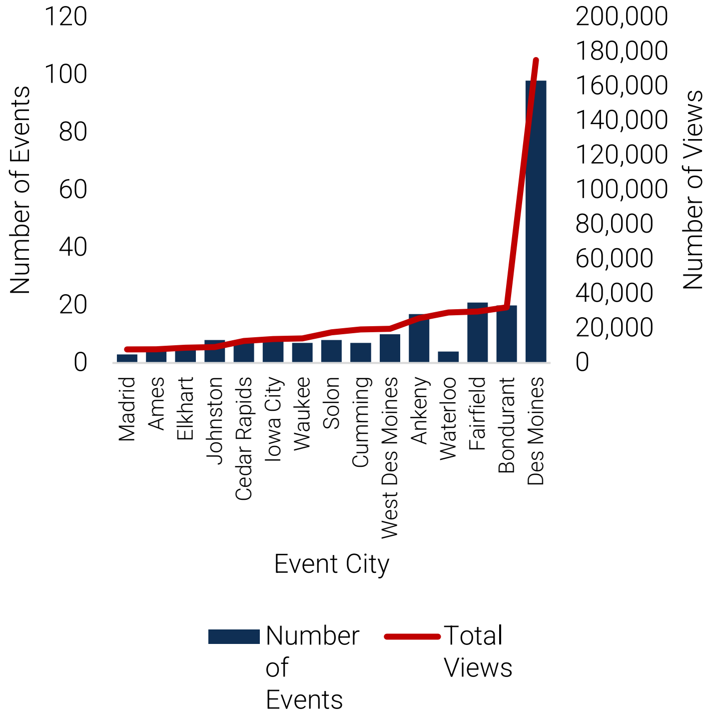
IOWA BIKE EVENTS

The data below is sourced from Bike Iowa and provides insights into the popularity and types of bike events across the state, as indicated by the number of events and total views per category. Views represent the number of times that event web pages were visited. Notably, "Party, Gravel, and Trail Rides" emerge as the most attended and most viewed categories. Des Moines stands out as the city with the highest concentration of events and views by a significant margin, suggesting it serves as a central hub for Iowa's cycling community and would be the logical destination for a potential Indoor Action Sports Complex within the state. Event frequency drops significantly during winter months, highlighting an opportunity for a potential Indoor Action Sports Complex to enable participation in bike activities and other action sports throughout the year.

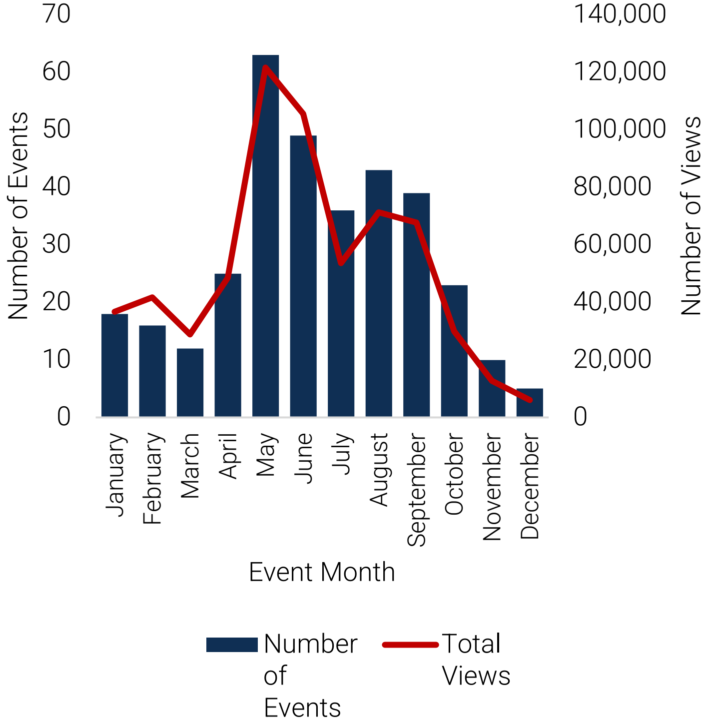
2023 Iowa Bike Events by Type



2023 Iowa Bike Events by City



2023 Iowa Bike Events by Month



Source: Bike Iowa, 2024.

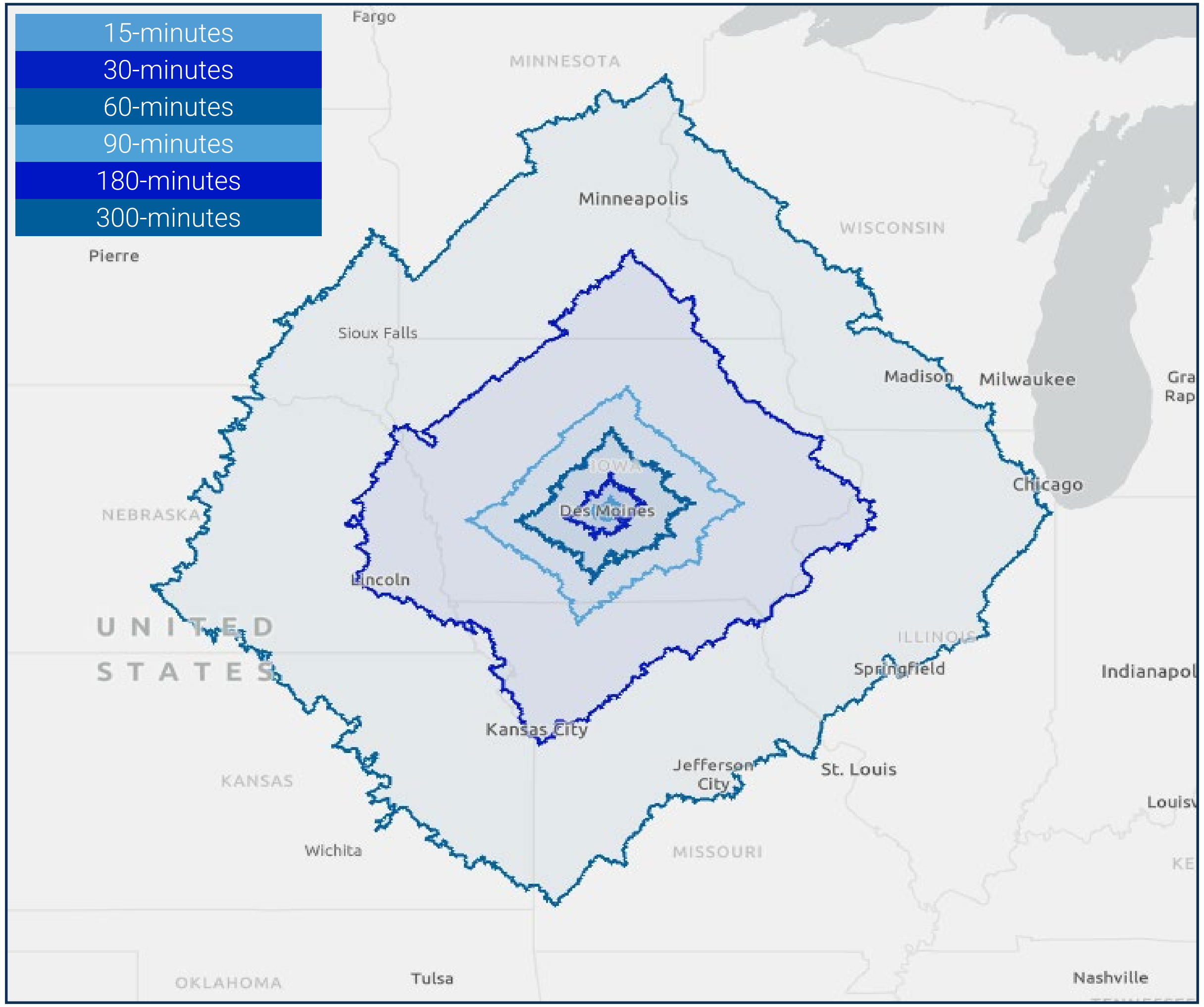
2 LOCAL & REGIONAL CONDITIONS

DRIVETIME AND ACCESSIBILITY

It is useful to consider the population that would be within driving distance of a potential Indoor Action Sports Complex, as wheel-sport enthusiasts often travel long distances to attend races, competitions, and other programming. This map and data showcase the extensive population bases within driving distance of Central Iowa.

Notable population centers within two to four hours include Kansas City, the Twin Cities, and Omaha. Its central location makes the Des Moines metro an ideal hub for attracting action sports and participants and spectators from surrounding states. Further detail regarding the demographics of these drive-in markets is provided on the following page.

City, State	Distance to Polk County (miles)	Distance to Polk County (hrs:min)	Market Population
Ames, IA	34	0:37	66,950
Iowa City, IA	114	1:42	171,491
Ceder Rapids, IA	127	1:49	276,530
Waterloo, IA	129	2:00	169,895
Omaha, NE / Council Bluffs, IA	134	2:01	976,671
Lincoln, NE	189	2:42	341,229
Kansas City, MO	193	2:45	2,392,035
Sioux City, IA	199	2:52	149,940
Rochester, MN	210	3:00	228,073
Mankato, MN	220	3:08	104,248
Twin Cities, MN	245	3:30	3,712,020
Jefferson City, MO	264	4:31	150,447
Madison, WI	282	4:34	694,345
Sioux Falls, SD	288	4:11	289,592
Springfield, IL	324	4:56	685,000



Source: Esri, Census Data, 2024.

2 LOCAL & REGIONAL CONDITIONS

DEMOGRAPHICS

The demographic data surrounding Central Iowa highlights a strong population base for a potential Indoor Action Sports Complex. Notably, the 30-minute and 90-minute drive times show significant projected growth rates of 1.1 percent and 0.7 percent, respectively, well above the U.S. benchmark of 0.4 percent. At the same time, the area is relatively young, with a median age within the 30-minute drivetime that is nearly three years younger than the national average. This suggests a notable base of young professionals, young families, and students in the area, each of which are typical users of an Indoor Action Sports Facility.

The median household income within a 30-minute drive is $88,268, with a per capita income of $47,128, both notably higher than the national average. This suggests that much of the local market has disposable income to pay for memberships, admissions, concessions, and other priced items at a potential Indoor Action Sports Complex.

Additionally, the employee-to-residential population ratios within 30- and 90-minute drive times, at 0.84:1 and 0.54:1 respectively, indicate a strong employment based but lower resident base. As a quality-of-life asset, a new Sports Complex would potentially help attract new residents to the area, which would further balance this ratio.

DEMOGRAPHIC VARIABLE	30-Minute Drivetime	90-Minute Drivetime	180-Minute Drivetime	Des Moines-West Des Moines MSA	Polk County	State of Iowa	United States
POPULATION:							
2010 Total Population	526,231	1,038,346	5,256,195	606,475	430,640	3,046,355	308,745,538
2024 Total Population	666,137	1,184,920	5,688,156	751,652	513,959	3,236,114	338,440,954
2029 Total Population	702,206	1,224,056	5,775,644	791,771	532,967	3,275,570	344,873,411
Annual Growth Rate (2010-2023)	1.9%	1.0%	0.6%	1.7%	1.4%	0.4%	0.7%
Annual Growth Rate (2023-2028)	1.1%	0.7%	0.3%	1.1%	0.7%	0.2%	0.4%
AGE:							
Median Age	36.4	37.5	38.0	37.0	36.4	38.9	39.3
Population age 25 to 44	29.0%	26.3%	26.4%	28.3%	29.1%	25.1%	26.9%
AGE DISTRIBUTION:							
Under 15	20.3%	19.0%	18.9%	20.1%	19.7%	18.5%	17.4%
15 to 24	13.2%	14.6%	13.9%	13.1%	13.3%	14.0%	13.2%
25 to 34	14.5%	13.1%	13.3%	14.1%	14.9%	12.5%	13.6%
35 to 44	14.5%	13.1%	13.0%	14.2%	14.2%	12.6%	13.3%
45 to 54	12.0%	11.3%	11.3%	12.0%	11.8%	11.2%	12.1%
55 and over	25.6%	28.8%	29.5%	26.7%	26.1%	31.2%	30.4%
HOUSEHOLD INCOME:							
Median Household Income	$88,268	$79,266	$73,557	$86,088	$82,379	$74,738	$79,068
Per Capita Income	$47,128	$42,813	$39,840	$46,113	$45,032	$40,369	$43,829
INCOME DISTRIBUTION:							
$0 to $24,999	11.0%	13.0%	15.1%	11.1%	12.0%	14.3%	14.9%
$25,000 to $49,999	16.2%	17.5%	18.6%	16.6%	17.3%	18.2%	16.8%
$50,000 to $74,999	15.5%	16.7%	17.0%	16.0%	16.3%	17.7%	15.7%
$75,000 to $99,999	12.2%	13.3%	13.7%	12.4%	12.4%	14.0%	12.8%
$100,000 to $149,999	19.2%	19.0%	18.2%	19.3%	18.6%	18.5%	17.6%
$150,000 or more	25.9%	20.6%	17.3%	24.7%	23.4%	17.3%	22.2%
POPULATION BY RACE/ETHNICITY:							
White/Caucasian	77.0%	81.4%	77.4%	78.4%	74.4%	83.3%	60.3%
Black/African American	6.6%	4.4%	7.0%	6.0%	7.7%	4.4%	12.5%
American Indian	0.4%	0.5%	0.7%	0.4%	0.5%	0.5%	1.2%
Asian	5.0%	3.6%	2.9%	4.5%	5.2%	2.5%	6.4%
Pacific Islander	0.1%	0.1%	0.2%	0.1%	0.1%	0.2%	0.2%
Other Race	3.5%	3.4%	4.3%	3.5%	4.2%	3.0%	8.8%
Two or More Races	7.5%	6.6%	7.4%	7.2%	8.0%	6.0%	10.7%
Hispanic Origin	9.2%	8.3%	10.0%	8.9%	10.6%	7.4%	19.6%
Diversity Index	49.4	43.1	49.8	47.4	53.9	39.5	72.5
BUSINESS:							
Total Business 2021	23,466	45,086	217,566	26,305	19,490	132,799	12,883,225
Total Employees 2021	400,250	646,437	3,195,840	426,868	346,571	1,798,353	160,403,925
Employee to Residential Pop. Ratio	0.84:1	0.54:1	0.53:1	0.55:1	0.50:1	0.48:1	0.47:1

Source: Esri, 2024.

2 LOCAL & REGIONAL CONDITIONS

CBSA COMPARISONS

This slide provides a demographic analysis of Des Moines compared to 20 Core-Based Statistical Areas (CBSA) closest in population size. A CBSA is a geographic region defined by the U.S. Office of Management and Budget that reflects urban centers and their economic connections. In this analysis, we compare Des Moines to 10 CBSAs immediately larger and 10 immediately smaller in population to offer insights into markets with similar resident volume. This exercise helps to evaluate the bike sport participation in Des Moines relative to comparably sized communities nationally. Additional comparative demographic analyses of markets with indoor BMX and skate facilities are presented within the Comparable Analysis Chapter later herein.

Historically, Des Moines, with a population of 751,652, was ranked as a Bronze-level Bike Friendly Community by the American League of Bicyclists (now unranked due to lack of renewal). The estimated number of bikers and skaters in each CBSA is proportional to population size, with metrics showing 240,529 bikers and 20,019 skaters in Des Moines annually. These figures highlight a significant local market base, consistent with similarly sized markets.

Key	CBSA	Bike Friendly Community Tier	2024 Total Population	Estimated Number of Bikers (1+ day per year)	Estimated Number of Bikers (25+ days per year)	Estimated Number of Skaters
1	Charleston-North Charleston, SC	Bronze	859,047	274,895	112,707	22,880
2	Boise City, ID	Silver	852,423	272,775	111,838	22,703
3	Cape Coral-Fort Myers, FL	Bronze	840,698	269,023	110,300	22,391
4	Oxnard-Thousand Oaks-Ventura, CA	Bronze	837,213	267,908	109,842	22,298
5	Dayton-Kettering-Beavercreek, OH	Bronze	816,932	261,418	107,181	21,758
6	Lakeland-Winter Haven, FL	Bronze	812,640	260,045	106,618	21,644
7	Stockton-Lodi, CA	Unranked	808,566	258,741	106,084	21,535
8	Greensboro-High Point, NC	Bronze	792,457	253,586	103,970	21,106
9	Colorado Springs, CO	Silver	792,301	253,536	103,950	21,102
10	Little Rock-North Little Rock-Conway, AR	Silver	764,872	244,759	100,351	20,371
11	Des Moines-West Des Moines, IA	Unranked	751,652	240,529	98,617	20,019
12	Provo-Orem-Lehi, UT	Silver	749,524	239,848	98,338	19,963
13	Deltona-Daytona Beach-Ormond Beach, FL	Unranked	718,006	229,762	94,202	19,123
14	Kiryas Joel-Poughkeepsie-Newburgh, NY	Unranked	707,674	226,456	92,847	18,848
17	Madison, WI	Platinum	706,315	226,021	92,669	18,812
15	Akron, OH	Bronze	697,418	223,174	91,501	18,575
16	Winston-Salem, NC	Bronze	696,248	222,799	91,348	18,544
18	Ogden, UT	Bronze	672,858	215,315	88,279	17,921
20	Wichita, KS	Bronze	655,685	209,819	86,026	17,463
19	Syracuse, NY	Unranked	652,264	208,724	85,577	17,372
21	Palm Bay-Melbourne-Titusville, FL	Unranked	642,218	205,510	84,259	17,105

Source: Esri, Statista, Census Data, Corona Insights, American League of Bicyclists, 2024.

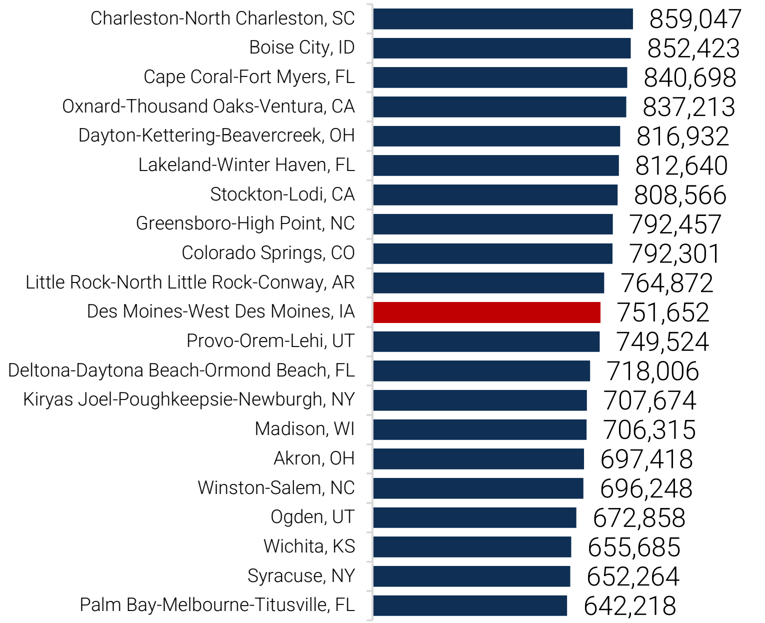
2 LOCAL & REGIONAL CONDITIONS

CBSA COMPARISONS

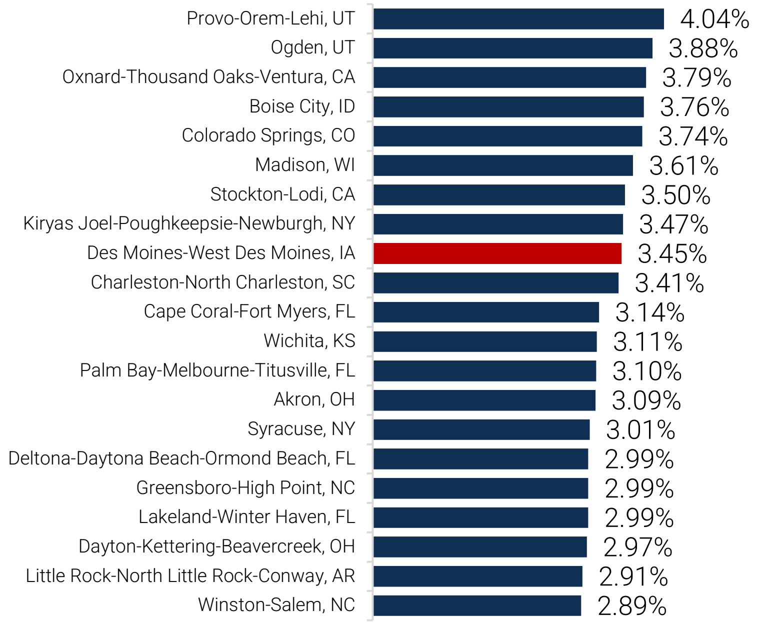
The data below highlight Des Moines' standing among comparable CBSA's in terms of population and bike participation rates. Des Moines ranks slightly above the median (9th of 21) of these markets in mountain biking participation, with an estimated 3.45 percent of the population engaging in this activity. This places the market just above several smaller CBSAs and in alignment with larger ones, such as Cape Coral and Charleston. For road biking, Des Moines again just surpasses the median (10th of 21), with an 11.22 percent participation rate, positioning it below several markets such as Madison, Kiryas-Joel, Provo, and Ogden.

The Esri GIS platform does not offer BMX participation data. However, comparatively higher participation in mountain biking, which is considered an action sport, suggests the market has a strong base of action sport enthusiasts who may participate in or be interested in participating in BMX.

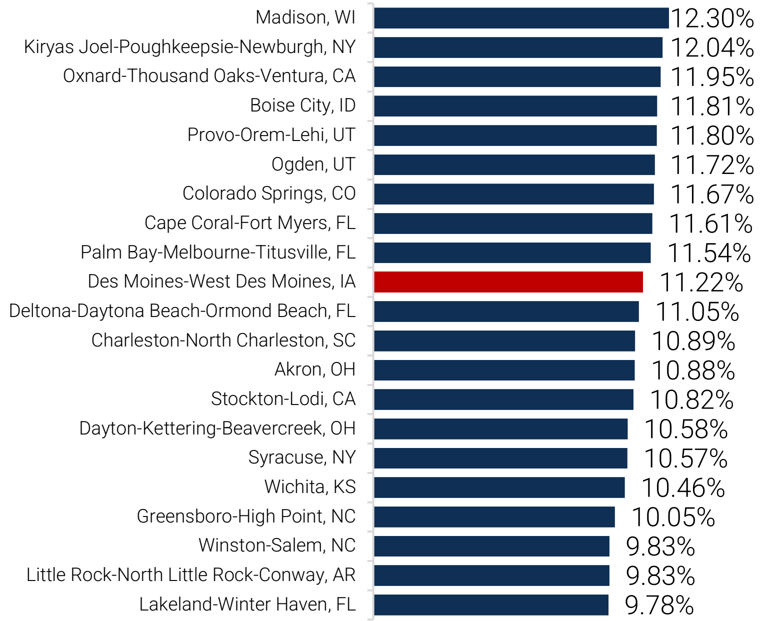
2024 Population



2024 Participation in Mountain Biking (%)



2024 Participation in Road Biking (%)



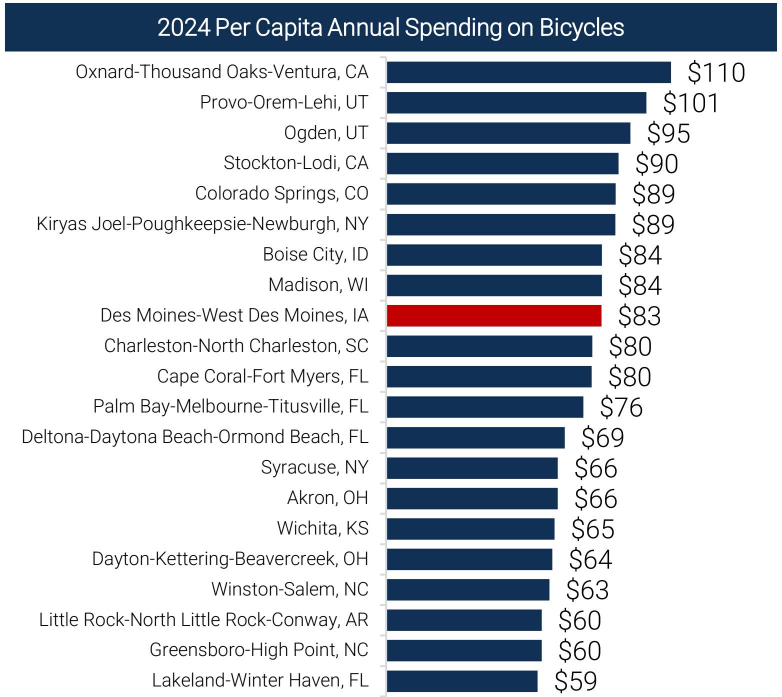
Source: Esri, 2024.

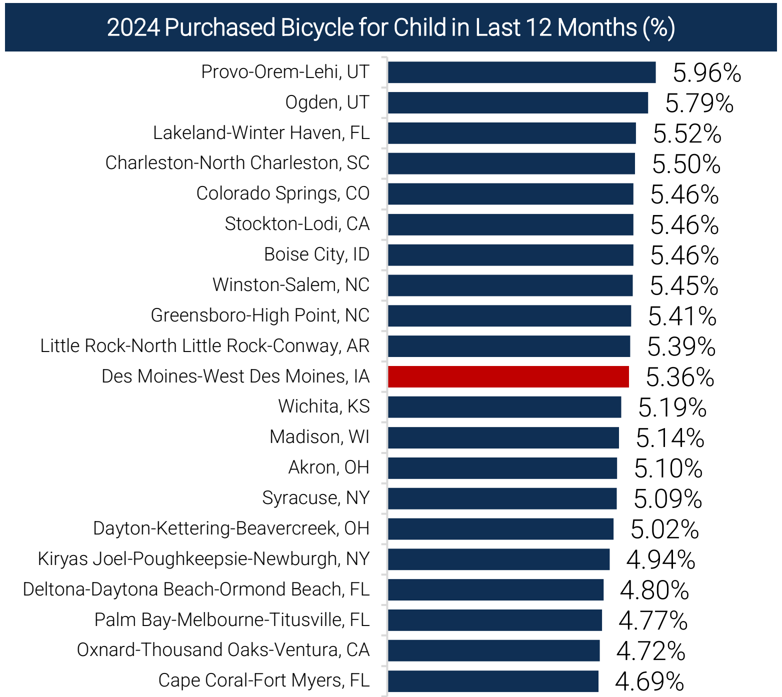
2 LOCAL & REGIONAL CONDITIONS

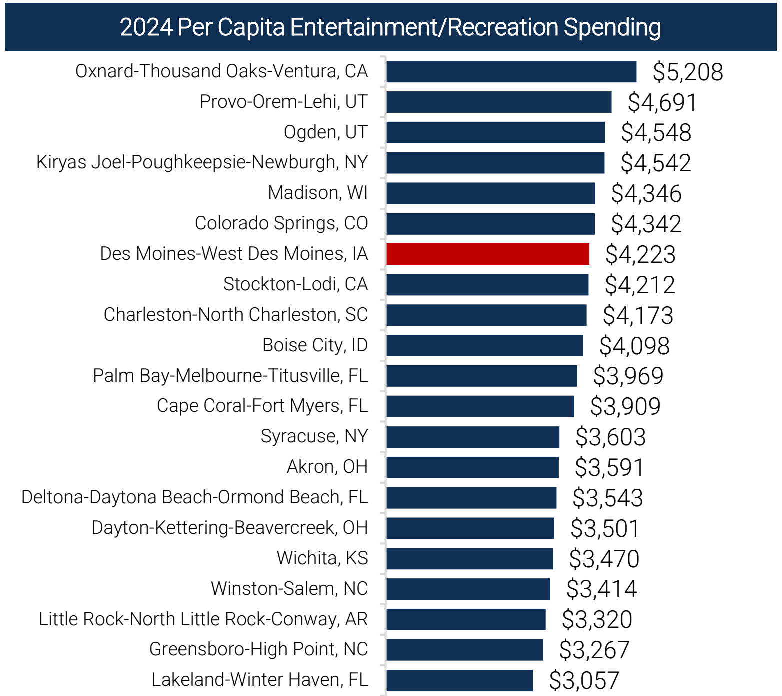
CBSA COMPARISONS (continued)

In terms of per capita annual spending on bicycles, Des Moines ranks competitively (9th of 21) at $83.36. This demonstrates consumer base with a notable willingness to invest in wheeled sports and cycling equipment, a positive indicator for a potential Indoor Action Sports Complex. In terms of bike purchases, Des Moines ranks at the median with 5.36 percent of its population purchasing bikes for their children in the last 12 months. Lastly, Des Moines shows robust per capita entertainment and recreation spending at $4,223, ranking 7th among 21 markets. This indicates a local population willing to allocate discretionary income towards recreational activities.

Combined with its cycling-related spending, the Des Moines CBSA demonstrates a somewhat supportive consumer base for an Indoor Action Sports Complex.


2024 Per Capita Annual Spending on Bicycles


2024 Purchased Bicycle for Child in Last 12 Months (%)


2024 Per Capita Entertainment/Recreation Spending

Source: Esri, 2024.

2 LOCAL & REGIONAL CONDITIONS

ATTRACTIONS INVENTORY

The attraction inventory of Central Iowa highlights a robust mix of entertainment, recreation, and leisure options, supporting its viability as a destination for visitors. With top attractions like Prairie Meadows, Jordan Creek Town Center, and Adventureland leading the list in terms of Google reviews, the area already benefits from a strong foundation of activity that caters to young families and youth. Google Reviews, although not a direct measure of attendance, serve as a reliable temperature gauge for visitation levels and reflect the attractions that are most visible and relevant to potential visitors. Cross-referencing with other platforms, such as TripAdvisor, Yelp, and Catch Des Moines, ensured a comprehensive and accurate list of relevant attractions.

This range of attractions caters to diverse interests, making Central Iowa a well-rounded destination for both local and regional visitors. A potential Indoor Action Sports Complex would naturally complement this mix, serving as a major draw for visitors seeking unique recreational opportunities.

Notable family-focused attractions include Smash Park, Sleepy Hollow Sports Park, and Raccoon River Park. These types of assets would likely support the marketability of the Complex to potential user groups from around the country, such as USA BMX. Typical action sports event attendees would likely spend disposable income to frequent these attractions, maximizing a potential Complex's economic impact for the community.

Proximity to a number of these assets should be considered an important criterion for deciding where to develop the potential Indoor Action Sports Complex. This is further discussed as part of the Site Analysis later herein.

Key	Name	Google Reviews
1	Prairie Meadows	9,876
2	Jordan Creek Town Center	9,754
3	Adventureland	8,194
4	Iowa State Fairgrounds	7,620
5	Blank Park Zoo	6,066
6	Breakout Games - Des Moines	5,403
7	Pappajohn Sculpture Park	5,040
8	Wells Fargo Arena	4,898
9	Outlets of Des Moines	3,775
10	Greater Des Moines Botanical Garden	3,175
11	Hessen Haus	3,170
12	Downtown Farmers Market	3,140
13	Cinemark Altoona and XD	3,064
14	El Bait Shop	2,795
15	Smash Park	2,487
16	Raccoon River Park	2,389
17	Principal Park	2,355
18	Cinemark 20 Jordan Creek and XD	2,280
19	Grey's lake Park	2,155
20	Brass Armadillo Antique Mall	1,981
21	Up-Down	1,784
22	The Royal Mile	1,691
23	Hoyt Sherman Place	1,680
24	Iowa Events Center	1,560
25	B Roll Bowling	1,535
26	Water Works Park	1,482
27	Capitol Building	1,405
28	Flix Brewhouse	1,207
29	Living History Farms	984
30	Funny Bone Comedy Club	958
31	Big Creek State Park	949
32	Copper Creek 9	917
33	Court Avenue	835
34	Val Air Ballroom	790
35	Urban Air Trampoline and Adventure Park	683
36	Walnut Woods State Park	680
37	The Keg Stand	651
38	John F. Kennedy Memorial Park	598
39	Robert D. Ray Asian Gardens	596
40	Science Center of Iowa	592
41	Copper Creek Lake	592
42	Confluence Brewing Company	572
43	Fleur Cinema	566
44	Noce Jazz Club	557
45	State Historical Museum	517
46	Sleepy Hollow Sports Park	513
47	Kippy's Place	503
	Average	2,450
	Total	115,000

Prairie Meadows

Jordan Creek Town Center

Adventureland

Source: TripAdvisor, Google, Yelp, Catch Des Moines, 2024.

CORPORATE BASE

Polk County's corporate base should serve as a significant asset for the potential success of an Indoor Action Sports Complex in Central Iowa. With headquarters and regional offices for major companies spanning diverse industries such as finance, insurance, healthcare, and technology, this corporate presence offers two key opportunities for the project. First, these corporations could serve as sponsors or donors, supporting the development and operational sustainability of the Complex. Sponsorship opportunities could range from naming rights and event partnerships to contributions toward community engagement initiatives tied to the Complex. Second, the employee base of these companies, the families of whom are likely to seek recreational and fitness opportunities, could become a substantial user group for the Complex. This workforce, along with their families, could drive utilization and engagement with the facility. It should also be noted that government entities, while not listed here due to the lack of publicly available employee information, represent a significant portion of Polk County's employment base. These entities are important potential users of the Complex, as their employees and families would similarly benefit from the recreational and fitness opportunities offered by the facility.

The corporate community's potential involvement in both financial support and user engagement underscores the alignment between a thriving corporate sector and the development of unique and valuable quality-of-life assets that support employee recruitment. An Indoor Action Sports Complex would provide employees and their families with unique amenities while strengthening the region's reputation as a vibrant, active place to live and work.

Summary of Polk County's Largest Non-Government Employers

	Name	Main Location(s)	Number of Employees	Industry/ Sector
1	Hy-Vee, Inc.	West Des Moines	11,782	Grocery
2	Wells Fargo & Company	Des Moines, West Des Moines	11,000	Financial Services
3	MercyOne	Metro-wide	5,641	Healthcare
4	Principal	Des Moines	5,595	Financial Services
5	UnityPoint Health	Des Moines, West Des Moines	5,147	Healthcare
6	Amazon	Bondurant, Grimes, Ankeny	4,100	Distribution
7	John Deere: Des Moines Works, Financial, and ISG	Ankeny, Johnston, Urbandale	3,800	Agriculture
8	Vermeer Corporation	Pella	3,600	Agriculture
9	Nationwide	Des Moines	3,300	Insurance
10	JBS USA	Marshalltown	2,300	Food Processing
11	Corteva Agriscience	Johnston	2,255	Agriculture
12	Pella Corporation	Pella	2,224	Construction
13	Maverik/Kum & Go	Des Moines	2,000	Convenience Store
14	Mercer Health & Benefits, LLC	Urbandale	1,800	Professional Services
15	Casey's General Stores, Inc.	Ankeny	1,750	Convenience Store
16	UPS	Des Moines	1,721	Distribution
17	Wellmark Blue Cross Blue Shield of Iowa	Des Moines	1,700	Insurance
18	Bridgestone Americas Tire Operations	Des Moines	1,600	Manufacturing
19	Athene	West Des Moines	1,600	Financial Services
20	Lumen	Des Moines	1,500	Telecommunications
	Average		3,720	
	Total		74,400	

Source: Greater Des Moines Partnership, 2024.

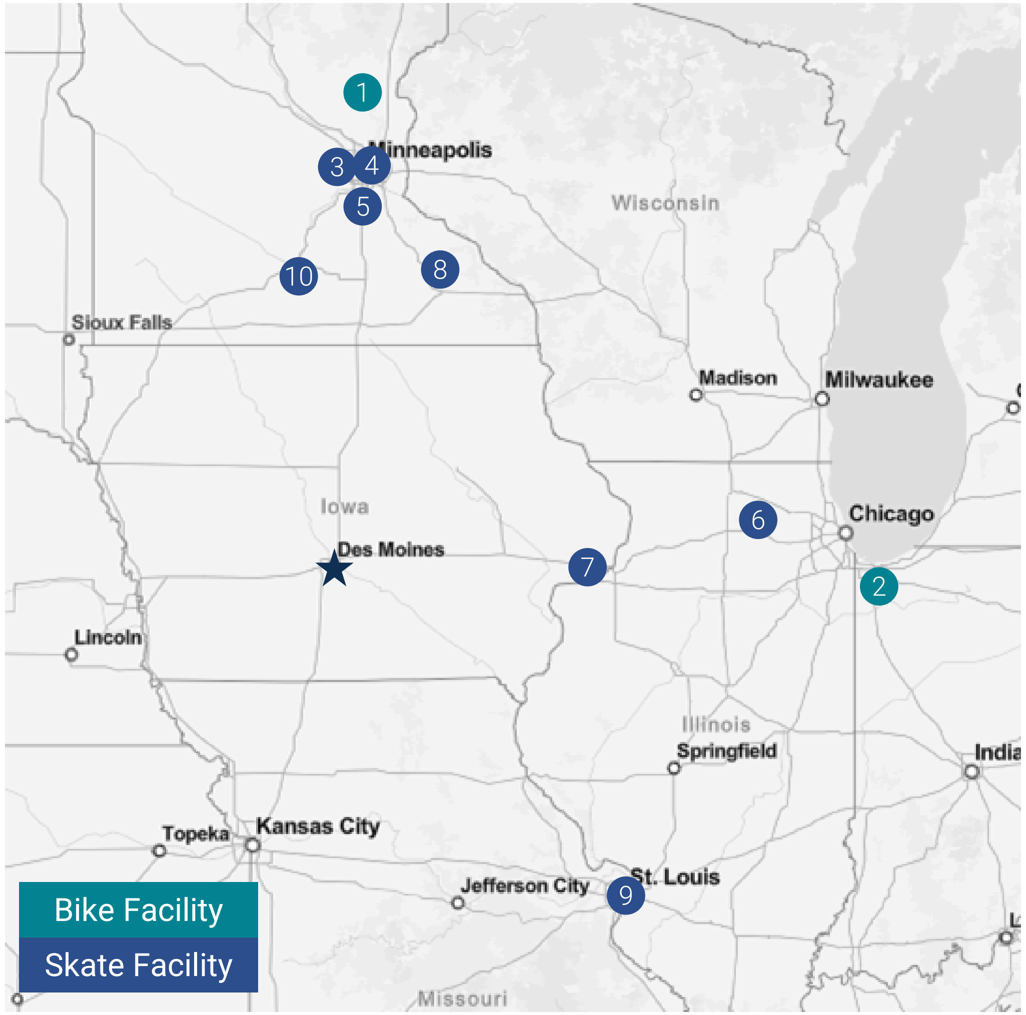
COMPETITIVE INDOOR BIKE & SKATE FACILITIES

An analysis of regional competitive landscape for indoor bike and skate facilities highlights a limited number of options within a 350-mile radius of Des Moines. Ten total facilities are shown in the adjacent map, including only two indoor BMX destinations. These facilities vary in size, with an average building size of 24,800 square feet and the largest, Rum River BMX in Isanti, Minnesota, occupying 75,800 square feet.

From 2017 to 2023, these facilities have seen an average historic annual growth rate of 2.9 percent in unique visitors and 4.0 percent in total visits, suggesting a modest upward trend in engagement and utilization. In 2023 alone, the facilities recorded an average of 5,700 unique visitors and 21,500 total visits. This reflects a smaller, niche user base at each facility, suggesting that a potential new Indoor Action Sports Complex in Central Iowa will need to be aggressively marketed and programmed to achieve higher visitation levels.

The data also highlight the scarcity of BMX-specific indoor facilities, which further reinforces the potential for Des Moines to address a gap in the regional market. By providing a comprehensive space that caters to both skate and bike users, an Indoor Action Sports Complex in Des Moines could not only meet local and regional needs but also attract participants willing to travel for such specialized offerings.

Key	Facility	Market	Bike or Skate?	Miles to Des Moines	Building Square Feet	2017 Placer Unique Visitors	2017 Placer Total Visits	2023 Placer Unique Visitors	2023 Placer Total Visits	Visitors - Historic Annual Growth Rate	Visits - Historic Annual Growth Rate
1	Rum River BMX	Isanti, MN	Bike	285	75,800	5,900	73,500	7,600	66,100	4.8%	-1.7%
2	Steelwheels Indoor BMX	Hobart, IN	Bike	355	40,600	3,200	7,900	4,400	19,600	6.3%	24.7%
3	3rd Lair	Golden Valley, MN	Skate	247	20,100	8,100	24,200	7,700	29,400	-0.8%	3.6%
4	Familia Skateboard Shop	Minneapolis, MN	Skate	246	13,400	4,300	13,400	6,500	15,200	8.5%	2.2%
5	SkaterApolis	Burnsville, MN	Skate	227	29,600	N/A	N/A	N/A	N/A	N/A	N/A
6	Fargo Skateboarding	DeKalb, IL	Skate	273	10,900	7,500	19,700	8,400	18,800	2.0%	-0.8%
7	Skate Church	Davenport, IA	Skate	168	8,500	N/A	N/A	N/A	N/A	N/A	N/A
8	The Garden Skatepark	Rochester, MN	Skate	217	6,800	N/A	N/A	5,300	10,700	N/A	N/A
9	Ramp Riders	St. Louis, MO	Skate	341	32,300	4,400	8,800	4,000	8,900	-1.5%	0.2%
10	YMCA Chesley Skate Park	Mankato, MN	Skate	208	10,100	1,400	3,600	1,500	3,600	1.2%	0.0%
	AVERAGE			257	24,800	5,000	21,600	5,700	21,500	2.9%	4.0%



Source: Facility Sites, Facility Management, News Publications, Placer.ai, 2024.

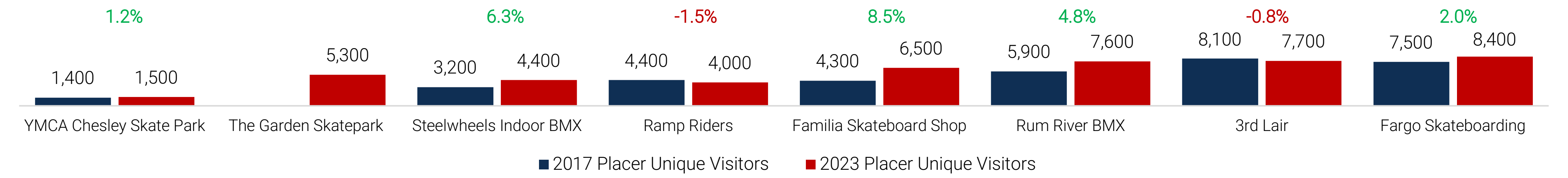
2 LOCAL & REGIONAL CONDITIONS

COMPETITIVE BIKE & SKATE FACILITIES - VISITATION

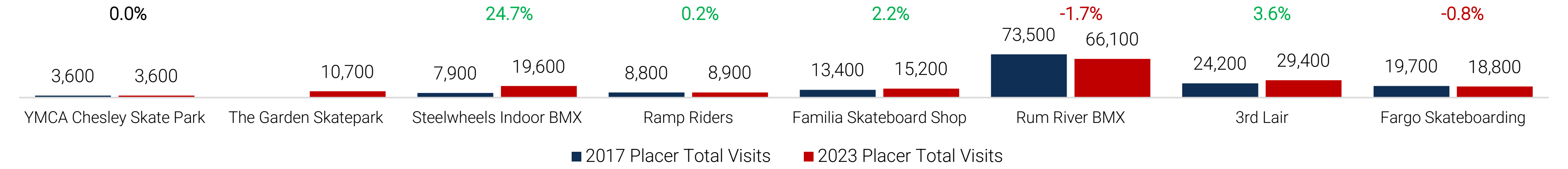
The data regarding unique and total visitor growth from 2017 to 2023 for regional indoor bike and skate facilities highlights several key insights for the feasibility and potential of an Indoor Action Sports Complex in Central Iowa. There are some positive growth trends, such as Steelwheels Indoor BMX experiencing a notable 6.3 percent annual growth rate in unique visitors and a significant 24.7 percent in total visits year-over-year since 2017. Facility management attribute this growth, mainly repeat ridership growth, to a spike in BMX interest due to the Pandemic and increased outreach following the addition of key volunteers. However, the overall growth across facilities has been modest, averaging 2.9 percent for unique visitors and 4.0 percent for total visits annually. Several facilities, such as Rum River BMX and 3rd Lair, have seen stagnation or slight declines in their visitation rates, which underscores a broader challenge It may be critical for a Central Iowa Indoor Action Sports Complex to feature differentiated offerings to attract a greater attendee base and continually grow its visitation levels.

This facility could leverage the Des Moines area's strong regional accessibility and centralized location to pull in visitors from underserved markets, including BMX enthusiasts, who currently have only two dedicated facilities within a 350-mile radius. Additionally, the inclusion of multipurpose spaces and hospitality amenities could mitigate seasonal fluctuations and offer a more dynamic alternative to the limited offerings of the reviewed regional facilities.

2017 to 2023 Unique Visitors



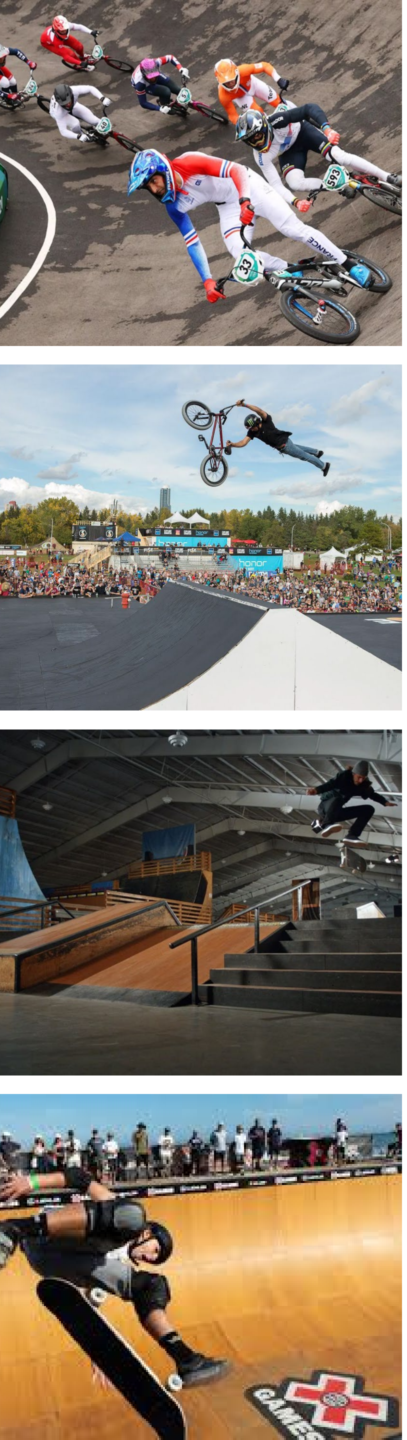
2017 to 2023 Total Visits



Annual Growth Rate

Annual Negative Growth Rate

Source: Placer.ai, 2024.



INDUSTRY TRENDS

CSL

3 INDUSTRY TRENDS

AMATEUR SPORTS OVERVIEW

The economy of Central Iowa, like any destination, is shaped by numerous external factors such as economic conditions, corporate relocations, changes in government or institutional presence, and other elements that influence employment, income, tax revenues, and overall economic stability. Amid these influences, the visitor industry plays a pivotal role in driving regional economic health by injecting new dollars into the local economy. This influx of visitor spending generates net new tax revenues, benefiting the community while placing minimal strain on public infrastructure and alleviating the tax burden on residents.

Competition for visitor market share remains intense nationwide, with communities continually investing in infrastructure and attractions designed to draw visitors. Sports tourism facilities have emerged as a key component of this strategy, capitalizing on the growing popularity of amateur sports and the potential to drive economic impact through increased visitation. Central Iowa's proposed Indoor Action Sports Complex reflects these national trends, aiming to establish itself as a destination for sports tourism and a hub for local recreation.

Sports tourism is one of the fastest-growing segments of the tourism industry. Across the United States, the number of travel sports programs and participants continues to rise, matched by communities' investments in large, multi-sport complexes. These facilities often deliver high returns on investment for host destinations, driving hotel room nights, boosting local spending, and creating measurable economic impact. Recognizing this potential, many communities, including those in Central Iowa, are prioritizing the development of modern sports complexes to enhance their competitiveness in attracting sports events.

A 2020 Tourism Economics study highlighted the significant economic benefits of sports tourism, reporting an increase of over 10 million sports travelers since 2015, a cumulative growth of 5.9 percent. Additionally, the study estimated $45.1 billion in direct spending by sports travelers, event organizers, and venues—a 16.7 percent increase since 2015. These figures underscore the substantial economic opportunity inherent in the sports tourism sector.

Nationwide, significant investments in sports and multi-component complexes have resulted in facilities that are increasingly flexible, efficient, and capable of generating substantial revenue. The proposed Indoor Action Sports Complex in Central Iowa seeks to leverage these evolving trends, positioning itself as a cornerstone of the region's sports tourism strategy while meeting the recreational needs of the local community.

3 INDUSTRY TRENDS

SPORTS TOURISM INDUSTRY

The Sports Events & Tourism Association (Sports ETA), founded in 1992, has been pivotal in providing education and fostering connections among sports tourism destinations, event organizers, and industry stakeholders. In 2021, Sports ETA collaborated with Northstar Meetings Group and Tourism Economics to release a comprehensive State of the Industry report. This report provided insights into the economic impact, tax revenue generation, job creation, and spending trends associated with hosting youth and adult amateur sports events, as well as collegiate tournaments.

The report highlighted that the sports tourism sector generated approximately $39.7 billion in direct spending in 2021, fueled by an estimated 174.7 million travelers attending sports events as participants or spectators. This spending contributed to a total economic impact of $91.8 billion, supporting around 635,000 full- and part-time jobs and generating $12.9 billion in tax revenue. However, it is important to note that action sports, while an important segment, represent a niche portion of this broader economic impact, with their unique characteristics and demographics contributing to targeted opportunities within the overall sports tourism economy.

Transportation spending, including airfare, rental cars, and rideshare services, accounted for the largest share of direct spending, totaling approximately $9.7 billion. Housing expenditures followed closely at $8.4 billion, with food and beverage services at $7.5 billion. Recreation and entertainment spending reached $5.3 billion, retail accounted for $5.0 billion, and $3.7 billion was dedicated to tournament operations, including payroll, marketing, and administrative expenses.

Of the estimated 174.7 million sports travelers, 94.7 million (54%) stayed overnight at event destinations, resulting in 66.5 million room nights. Overnight visitors spent an average of $317 per trip, significantly higher than the $75 per trip spent by day-trippers. The food and beverage industry experienced the most significant employment impact, with approximately 135,000 jobs supported, followed by the recreation and entertainment sector with 108,500 jobs.

As action sports continue to grow, they hold the potential to diversify and enhance the sports tourism industry. Facilities like the proposed Indoor Action Sports Complex in Central Iowa can contribute to this niche by attracting enthusiasts and events that drive economic activity while complementing the broader sports tourism landscape.

$3.7B
Tournament Operations

+

$36.0B
Sports Traveler Visitor Spending

=

$39.7B
Total Direct Spending Impact of the Sports Tourism Sector

SPORTS PARTICIPATION BREAKDOWNS

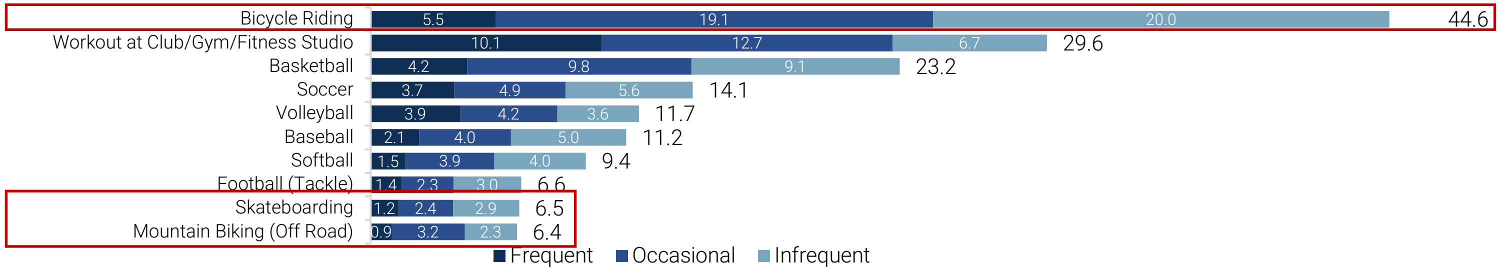
A summary overview of sports participation trends in the United States and the West North Central region (inclusive of Iowa) has been assembled. An understanding of these trends at a national, regional and local level provides a framework from which to begin to assess potential demand for a new Indoor Action Sports Complex in Central Iowa. The statistical data presented in this section was derived from the National Sporting Goods Association's Sports Participation study, which was most recently conducted in 2023. The study measures the annual number of participants in a variety of sports and recreational activities, and the frequency of participation during the previous calendar year. Research is derived from a study based on approximately 40,000 interviews encompassing youth and adult sports participation.

National participation levels can provide insights into the overall popularity of a sport or athletic activity, as well as the size of the base from which to attract new frequent participants. The exhibits to the right present a summary of the national participation rates of key outdoor and indoor sports, broken out by participation level (i.e., frequent, infrequent and occasional).

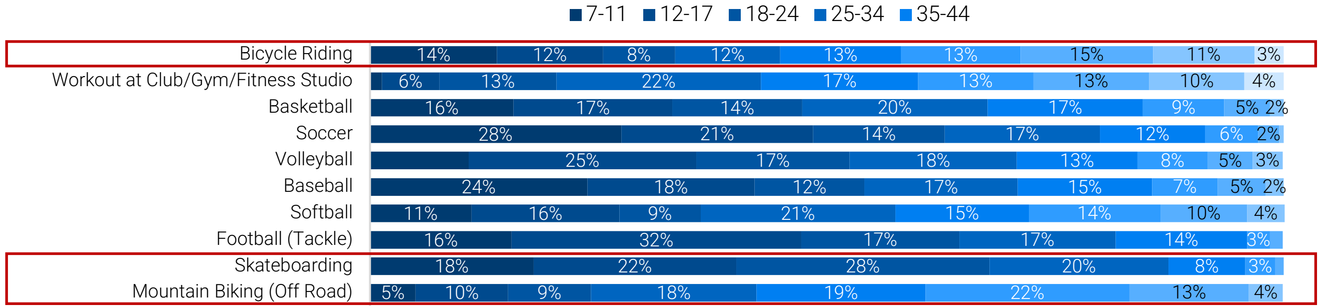
As shown, bicycle riding is the most popular activity within the comparison set, though a significant majority of participants are occasional or infrequent. Among traditional outdoor team-based sports, soccer, baseball and softball have the highest participation levels for outdoor sports with a fairly-balanced range of frequent to infrequent participants.

Skateboarding and mountain biking fall just behind tackle football in terms of participation. Skateboarding participants tend to be under 25, while mountain biking participation is well distributed across the age groups (like bicycle riding and club/gym/fitness participants).

Frequency of Participation by Sport (in millions)



Age Breakdown of Participation by Sport



Source: National Sporting Goods Association, 2024.

NATIONAL & REGIONAL EXTRAPOLATED PARTICIPATION

The exhibit to the right summarizes the frequent participation rates nationally and regionally for each sport indicated. The rate of participation includes only frequent users and does not account for occasional and infrequent users. The exhibit to the bottom right summarizes the estimated population base participating in each identified sport based on participation rates applied to the overall market population. As previously mentioned, the rate of participation includes only frequent users and does not account for occasional and infrequent users. Using this type of extrapolation, there are an estimated 12,600 frequent bicyclists in the 30-minute drivetime area surrounding downtown Des Moines, meaning they ride their bikes at least 110 times per year. Within the broader 180-minute drivetime, there are 107,400 of frequent riders. Meanwhile, there are an estimated 2,900 frequent skateboarders within the 30-minute drive time (meaning they skateboard at least 40 times per year), as well as nearly 1,300 mountain bikers (at least 30 times per year). Within 180 minutes, there are 24,600 estimated frequent skateboarders and more than 10,900 frequent mountain bikers. The Central Iowa region scores above national indices for bicycle riding and skateboarding.

Importantly, this type of evaluation metric is only one of a number of tools that are helpful in assessing demand associated with various sports and activities. Further research, including interviews with user groups, will be presented and discussed in subsequent sections of this report.

	Frequent Participation (times annually)	National Frequent Participation Rate	West North Central Index	Adjusted West North Central Participation Rate
Sport				
Bicycle Riding	110+	1.80%	105	1.89%
Mountain Biking (Off Road)	30+	0.30%	63	0.19%
Skateboarding	40+	0.40%	108	0.43%
Workout at Club/Gym/Fitness Studio	110+	3.32%	91	3.02%
Basketball	50+	1.38%	81	1.12%
Volleyball	20+	1.29%	115	1.48%
Soccer	40+	1.20%	99	1.19%
Baseball	50+	0.69%	91	0.63%
Softball	40+	0.50%	116	0.58%
Football (Tackle)	50+	0.45%	146	0.65%

	30-minute Drive Time of Des Moines		90-minute Drive Time of Des Moines		180-minute Drive Time of Des Moines		300-minute Drive Time of Des Moines		Polk County	
Market Population	666,137		1,184,920		5,688,156		22,076,557		513,959	
	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate	National Rate	Regional Rate
Sport										
Bicycle Riding	11,981	12,580	21,312	22,378	102,307	107,422	397,068	416,921	9,244	9,706
Mountain Biking (Off Road)	2,027	1,277	3,606	2,272	17,310	10,905	67,182	42,324	1,564	985
Skateboarding	2,669	2,883	4,748	5,128	22,794	24,617	88,465	95,543	2,060	2,224
Workout at Club/Gym/Fitness Studio	22,113	20,123	39,335	35,795	188,826	171,831	732,859	666,902	17,062	15,526
Basketball	9,207	7,457	16,377	13,265	78,617	63,680	305,123	247,150	7,103	5,754
Volleyball	8,562	9,846	15,230	17,514	73,109	84,076	283,748	326,310	6,606	7,597
Soccer	8,008	7,928	14,245	14,102	68,381	67,697	265,396	262,743	6,179	6,117
Baseball	4,619	4,203	8,216	7,476	39,438	35,889	153,066	139,290	3,563	3,243
Softball	3,354	3,890	5,966	6,920	28,638	33,220	111,146	128,930	2,588	3,002
Football (Tackle)	2,981	4,353	5,303	7,742	25,456	37,166	98,800	144,248	2,300	3,358

Source: National Sporting Goods Association, 2024.

3 INDUSTRY TRENDS

BMX OVERVIEW

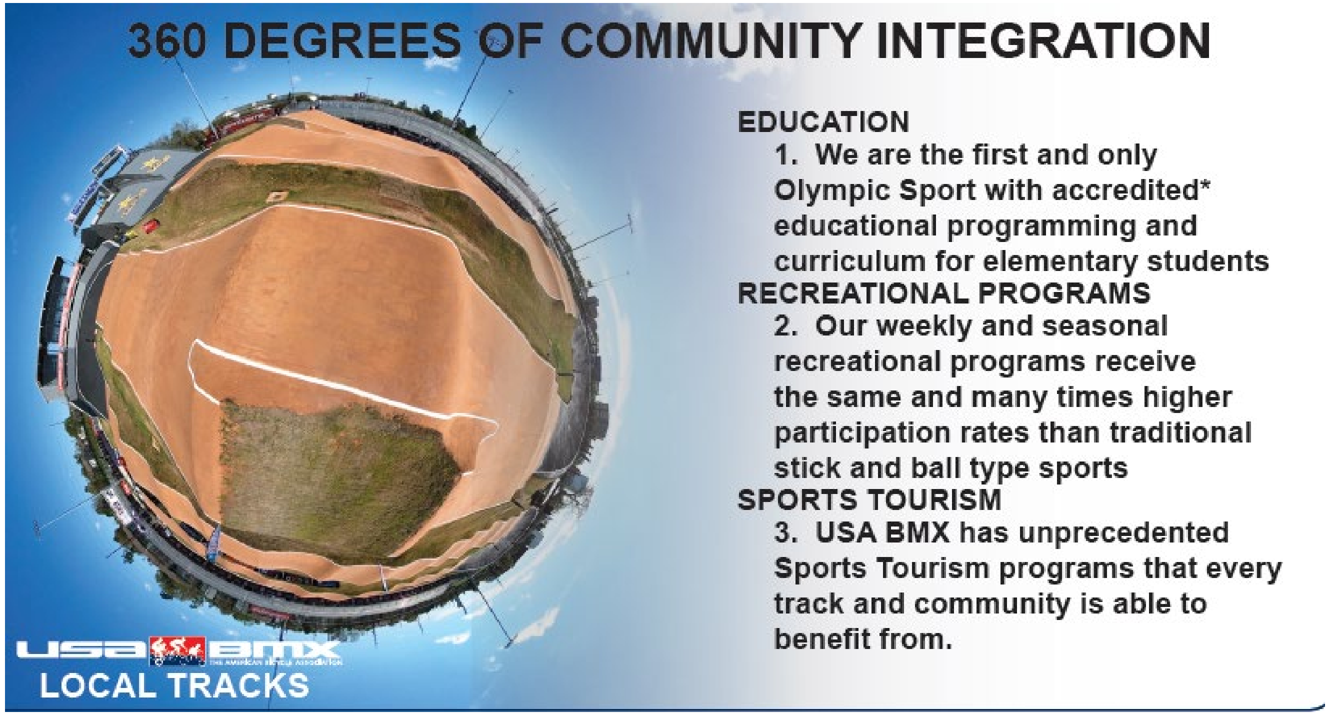
BMX (Bicycle Motocross) has evolved from a niche activity in California in the 1970s into a globally recognized sport, even earning a place in the Olympic Games. This rapid growth underscores the sport's wide appeal and accessibility for riders of all skill levels. BMX racing is more than just a competitive endeavor; it serves as a vibrant community activity that integrates education, recreation, and sports tourism. USA BMX, the sport's largest governing body, has been at the forefront of this growth. With over 70,000 members and 300 sanctioned tracks across North America, it plays a pivotal role in promoting BMX. The organization’s offerings include educational programming for elementary students, weekly and seasonal recreational programs with higher participation rates than traditional sports, and robust sports tourism initiatives that generate significant economic impact for local communities. Local BMX tracks, like those showcased by USA BMX, foster community engagement through year-round programming and events. These facilities not only provide a platform for riders to develop their skills but also act as hubs for community gatherings, making BMX an integral part of both sports culture and community development.

A BRIEF HISTORY

BMX racing has seen unprecedented growth over the past ten years. From a small pocket of California riders in the 1970s, to the Olympic Games today, BMX has evolved into a global sport for hundreds of thousands of racers around the world.

As we approach our 45th year, USA BMX continues to serve as the leader in this meteoric rise. Founded in 1977 in Chandler, Arizona, USA BMX has evolved into the world’s largest sanctioning body for BMX racing. Today, the organization has over 70,000 members racing at more than 300 sanctioned tracks across North America. These local races are augmented with a 33 race national series, culminating each year at the largest BMX race on earth, the USA BMX Grand Nationals.

Why Communities are Investing in USA BMX Tracks



360 DEGREES OF COMMUNITY INTEGRATION

EDUCATION

1. We are the first and only Olympic Sport with accredited* educational programming and curriculum for elementary students

RECREATIONAL PROGRAMS

2. Our weekly and seasonal recreational programs receive the same and many times higher participation rates than traditional stick and ball type sports

SPORTS TOURISM

3. USA BMX has unprecedented Sports Tourism programs that every track and community is able to benefit from.

LOCAL TRACKS

Source: USA BMX, 2024.

3 INDUSTRY TRENDS

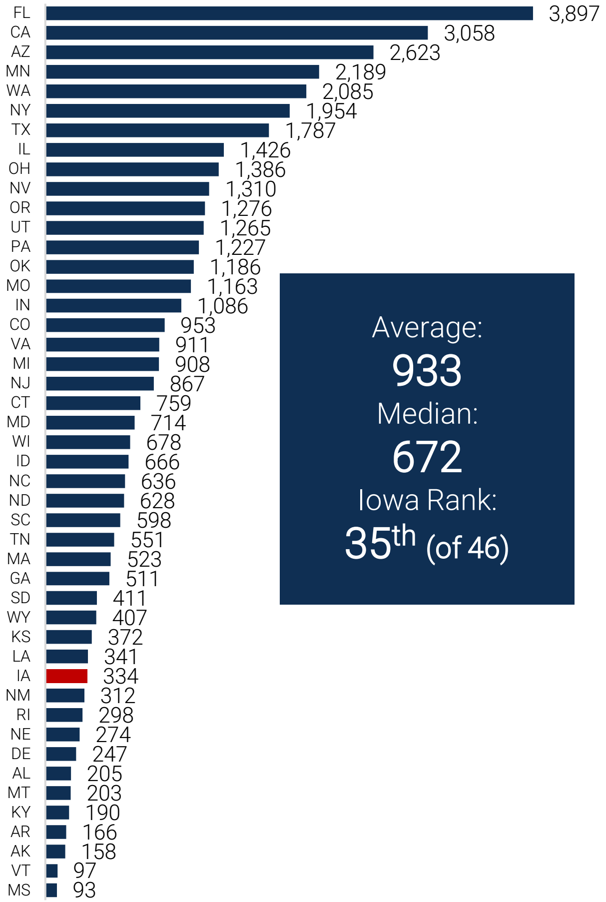
USA BMX MEMBERSHIPS BY STATE

The charts to the right depict USA BMX memberships by state. States like Florida, California, and Arizona lead in total memberships. Florida has 3,897 BMX members, significantly surpassing the national average of 933. Smaller states such as North Dakota, Wyoming, and South Dakota lead in memberships per capita, reflecting strong regional communities and participation rates. On average, states report 0.19 BMX memberships per 1,000 people, with a median of 0.13.

Iowa's BMX participant base indicates potential room for growth. With 334 total BMX memberships, the state ranks 35th out of 46, falling well below the national average and median. On a per capita basis, Iowa ranks 31st, with 0.10 memberships per 1,000 residents, which is slightly over half of the average. These figures are most likely influenced by Iowa's climate, paired with the lack of an indoor facility, which limit year-round outdoor participation. For instance, Minnesota ranks fourth, with 0.38 memberships per 1,000 persons, which may be partially attributable to the presence of Rum River BMX, a well-regarded indoor BMX complex.

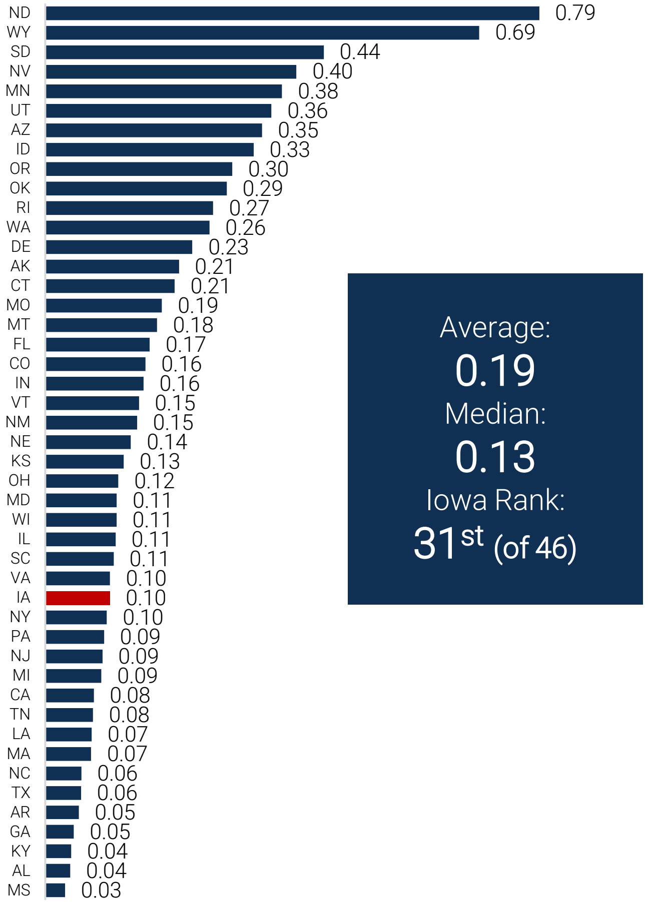
A centrally located Indoor Action Sports Complex in Iowa presents a opportunity to address these challenges and positively impact the state's BMX participation. By providing a year-round facility, such a Complex could eliminate weather-related barriers, create a dedicated space for BMX and other action sports, and foster community growth. Increased access to high-quality facilities would likely encourage new participants, particularly among younger demographics, and position Iowa as a more competitive player in the national BMX landscape. Over time, this could result in measurable growth in both total and per capita BMX memberships.

BMX Memberships by State(1)



Average:
933
Median:
672
Iowa Rank:
35th (of 46)

BMX Memberships Per 1,000 People by State(1)



Average:
0.19
Median:
0.13
Iowa Rank:
31st (of 46)

Note: (1) Data for 46 states is displayed.
Source: US Census, USA BMX, 2024.

3 INDUSTRY TRENDS

REGIONAL BMX EVENTS

Regional USA BMX events, such as the Gold Cup series, represent a unique and valuable opportunity for a potential Indoor Action Sports Complex in Central Iowa. These events are a core component of the USA BMX calendar, offering guaranteed hosting opportunities for USA BMX-sanctioned facilities. Across the country, there are approximately 85 total regional events annually, averaging 14 events per region. Participation at these events typically includes around 301 riders, with total attendance reaching approximately 1,264 attendees per event, generating an average of 225 hotel room nights.

However, it is important to note that the total number of these events is relatively limited nationwide. This underscores the competitive nature of hosting such events, placing a premium on the quality and appeal of the facilities involved. For Central Iowa, developing a high-quality, state-of-the-art track could mean not only securing one of these coveted events but also increasing the likelihood of hosting multiple events annually—potentially three or four—by attracting strong memberships and regional interest.

The ability to host such events would amplify the facility's utilization, generating significant economic impact through increased visitation, overnight stays, and spending. With careful planning and investment, Central Iowa's Indoor Action Sports Complex could solidify its place as a premier destination in the national BMX landscape.

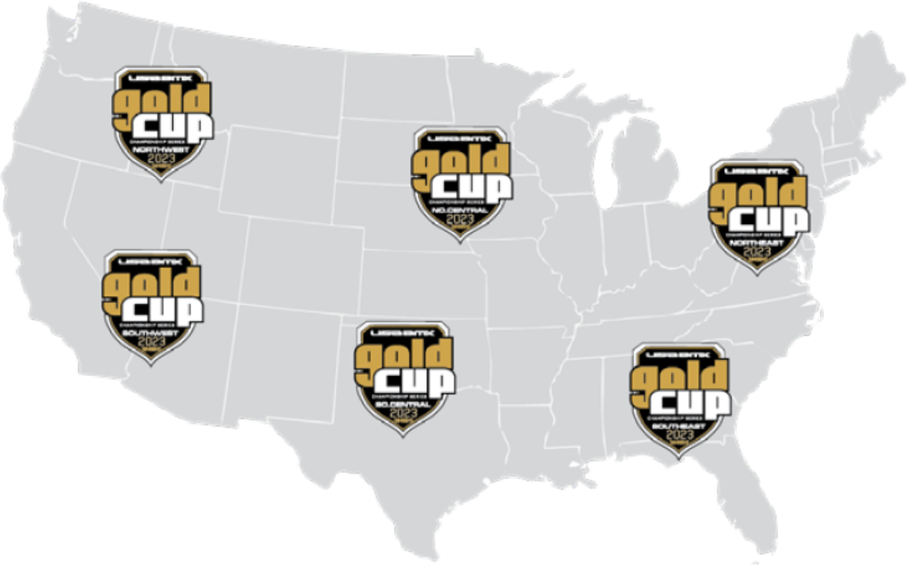
Regional USA BMX Events Impact

BY THE NUMBERS

Total Regional Events:	85 (14/reg)
Avg. Participation:	301
Avg. Total Attendance:	1,264
Avg. Hotel Room Nights:	225

CALCULATIONS

Attendance rate:	2/participant
Overnight rate:	.75/participant
Eco Impact Calc.:	75%/25% overnight/day



Source: USA BMX, 2024.

3 INDUSTRY TRENDS

NATIONAL BMX TRENDS

The national BMX landscape is characterized by robust membership, a widespread track network, and significant market growth projections. With over 70,000 USA BMX members spread across 300+ sanctioned tracks, the sport continues to thrive as a community-driven activity. On average, each track supports approximately 230 members, underscoring strong local engagement and participation in the sport.

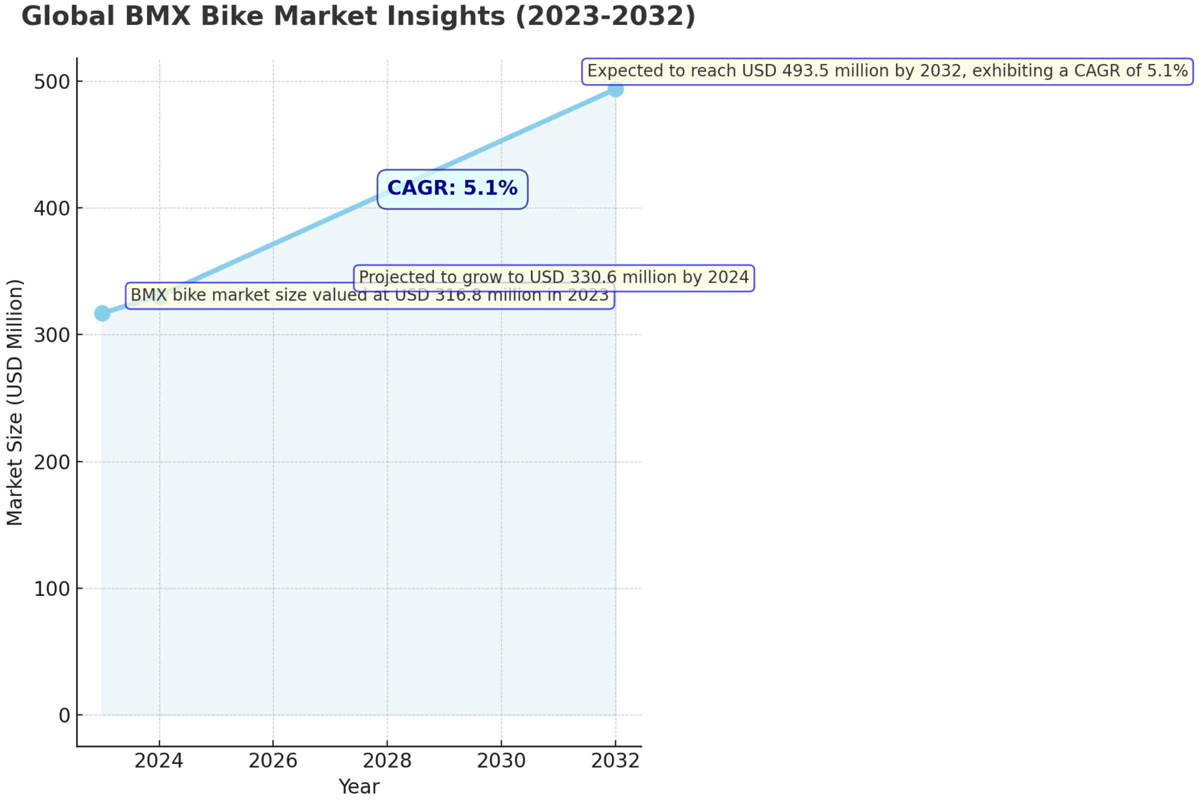
From a broader market perspective, the global BMX bike market is projected to grow significantly, with a compound annual growth rate (CAGR) of 5.1% through 2032. Starting from a valuation of $316.8 million in 2023, the market is expected to reach $330.6 million by 2024 and exceed $493.5 million by 2032. This growth reflects increasing interest and investment in BMX as a competitive and recreational sport.

These trends suggest a favorable environment for the development of BMX facilities nationally, including the potential Indoor Action Sports Complex in Central Iowa. By leveraging growing popularity and established demand for BMX, such a facility could position itself as a key player within this dynamic and expanding market.

70,000
USA BMX
members

300+
tracks

230
members per
track



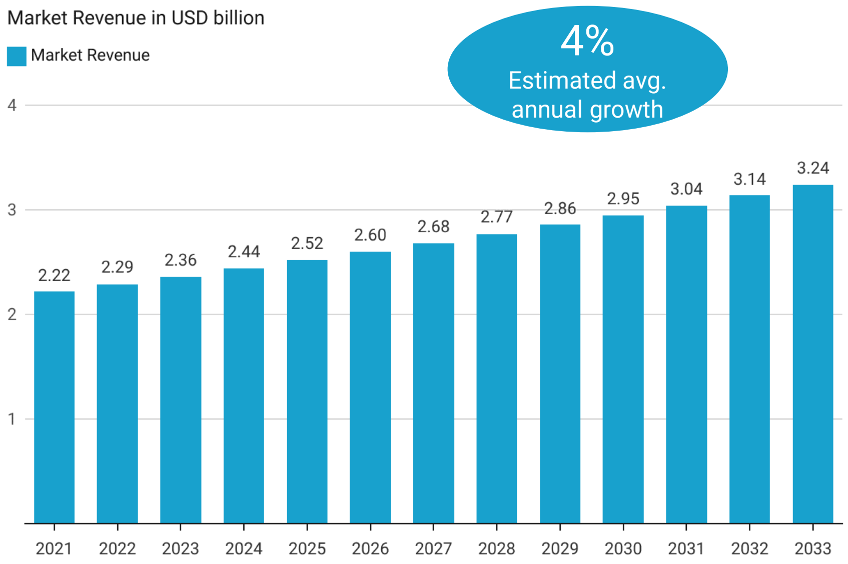
Source: USA BMX, Fortune Business Insights, 2024.

NATIONAL SKATE TRENDS

The global skateboarding market is demonstrating steady growth, fueled by rising interest in the sport and its expanding cultural relevance. Market revenue for skateboarding is projected to grow at an average annual rate of 4%, increasing from $2.22 billion in 2021 to an estimated $3.24 billion by 2033. This upward trend highlights the sustained demand for skateboarding products and the potential for further investment in related infrastructure, including indoor facilities.

In the United States, skateboarding participation has also shown resilience and growth. From a low of 6.23 million participants in 2012, the number has climbed steadily, with a notable increase during the COVID-19 pandemic, reaching 9.02 million in 2022 and settling at 8.92 million in 2023. This reflects a broader trend of outdoor and action sports gaining popularity. Together, these trends illustrate a moderately growing market for skateboarding, with opportunities to capitalize on its expanding participant base and market revenue. An Indoor Action Sports Complex in Central Iowa could tap into this momentum by providing a dedicated space to support and enhance skateboarding activities year-round.

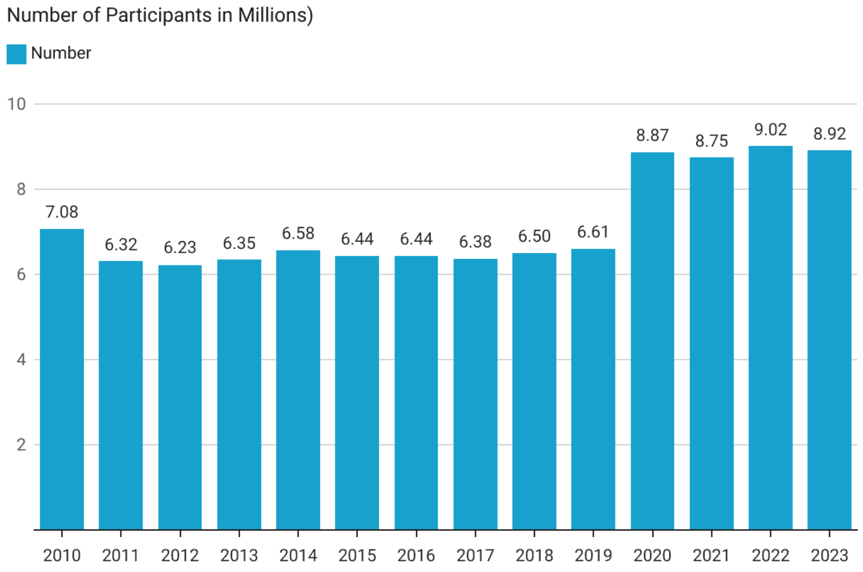
Global Skateboard Market Revenue



(Market Revenue in USD billion)

Source: Market.us News

Number of Skateboarding Participants in the United States



(Participants in Millions)

Source: Market.us News

Source: CSL, US Market News, 2024.

3 INDUSTRY TRENDS

SPORTS TOURISM DESTINATION TRENDS

Modern sports tourism destinations are increasingly incorporating diverse amenities to enhance visitor experiences and broaden their appeal. Facilities now include interactive offerings like climbing walls and ropes courses, attracting both families and casual visitors. Health and sports performance centers are becoming common, providing wellness services that support athletes and engage the community year-round. Digital placemaking, with advanced displays and interactive technologies, enhances the atmosphere and creates new opportunities for sponsorship and advertising.

Additionally, the integration of gaming and esports areas caters to younger audiences, while upgraded dining options offer high-quality, unique experiences that encourage longer visits. Many facilities are also positioned as focal points within mixed-use developments, anchoring vibrant districts with retail, dining, and entertainment offerings. For an Indoor Action Sports Complex in Central Iowa, adopting these trends could elevate its appeal as a regional destination and drive community and economic benefits.

Active Entertainment

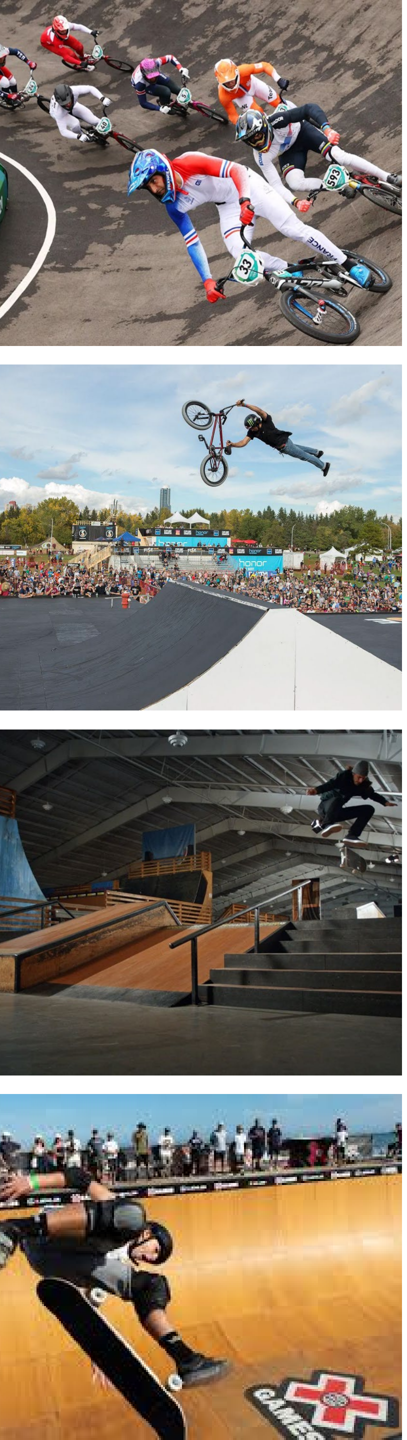
Health / Sports Performance Tenants

Digital Placemaking

Gaming / Esports

Enhanced Food & Beverage

Anchoring Districts



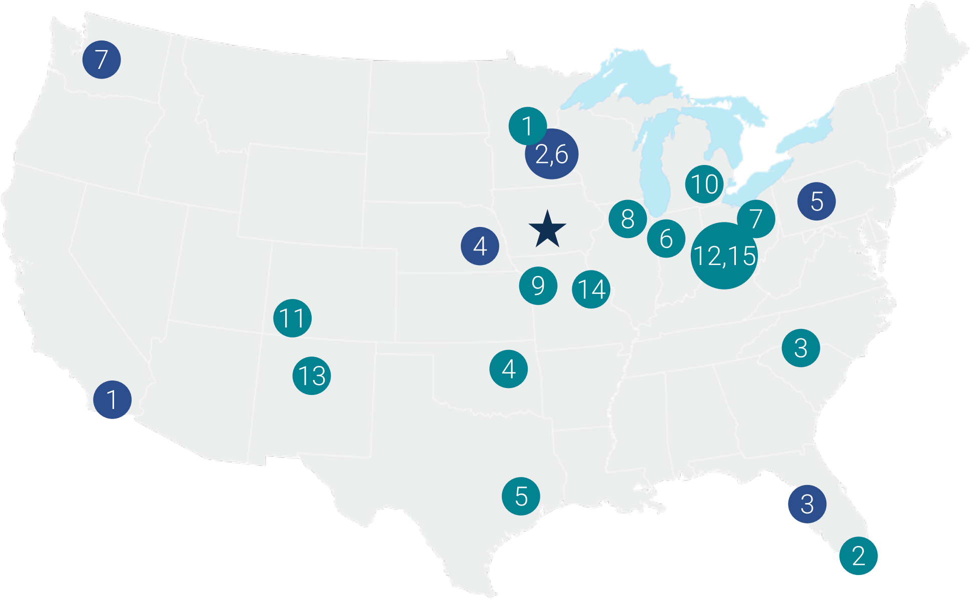
COMPARABLE FACILITIES

COMPARABLE FACILITIES

To gather insights regarding operational data and best practices for a potential Indoor Action Sports Complex, CSL identified and analyzed 22 action sports facilities nationally. This list includes 15 bicycle-focused facilities nationally including BMX tracks, mountain bike training facilities, pump tracks, and freestyle BMX facilities, some of which also offer skateboarding amenities. Rum River BMX, Steelwheels Indoor BMX, Rays Indoor Mountain Biking, Dayton Indoor BMX, and Mikes Indoor Bike Park are among the few facilities throughout the Country.

CSL also identified seven indoor skateboarding facilities throughout the country. These skatepark facilities offer a range of skate facilities such as street courses, pump tracks, bowls, vert ramps, and pro shops, among others. Facilities such as Camp Woodward Pennsylvania offer a vast range of action-sport activities including bike, skate, parkour, and others.

It should be noted that most facilities in both categories are owned and operated by a private or non-profit entity. This is further considered as part of the Governance/Management Chapter presented later herein. The following pages provide further detail regarding these facilities, as well as several detailed case studies.



Key	Bike Facility	Market	Owner	Operator
1	Rum River BMX	Isanti, MN	City	Non-Profit
2	Okeeheelee BMX	West Palm Beach, FL	City	Non-Profit
3	Rock Hill BMX Supercross Track	Rock Hill, SC	City	Parks & Rec
4	Hardesty National BMX Stadium	Tulsa, OK	Private	Private
5	RockStar Energy Bike Park	Houston, TX	Private	Private
6	Steelwheels Indoor BMX	Hobart, IN	Non-Profit	Non-Profit
7	Rays Indoor Mountain Biking	Cleveland, OH	Private	Private
8	Rockford BMX	Rockford, IL	City	Private
9	Raytown BMX Track	Kansas City, MO	Private	Non-Profit
10	Waterford Oaks BMX Track	Waterford Township, MI	County	Non-Profit
11	Durango BMX	Durango, CO	City	Parks & Rec
12	Dayton Indoor BMX	Dayton, OH	Private	Private
13	Duke City BMX	Albuquerque, NM	Private	Private
14	Westhoff Plaza Skate and BMX Complex	O'Fallon, MO	City	Parks & Rec
15	Mikes Indoor Bike Park	Dayton, OH	Private	Private
		% PUBLIC	40%	20%
		% PRIVATE/NON-PROFIT	60%	80%

	Skate Facility	Market	Owner	Operator
1	CA Training Facility Skatepark	Vista, CA	Private	Private
2	3rd Lair - MN	Golden Valley, MN	Private	Private
3	Skatepark of Tampa	Tampa, FL	Private	Private
4	The Bay	Lincoln, NE	Private	Private
5	Camp Woodward Pennsylvania	Woodward, PA	Private	Private
6	Familia Skate Shop	Minneapolis, MN	Private	Private
7	Bellevue Skatepark	Bellevue, WA	City of Bellevue	Parks & Rec
		% PUBLIC	14%	14%
		% PRIVATE/NON-PROFIT	86%	86%
	Lauridsen Skatepark	Des Moines, IA	Polk County	Polk County Conservation

Source: Google, Facility Management, Facility Sites, 2024.

4

COMPARABLE FACILITIES

COMPARABLE BIKE FACILITIES OVERVIEW

The 15 identified comparable bike facilities provide valuable insights into the potential development of an Indoor Action Sports Complex in Central Iowa. On average, these facilities occupy a building footprint of approximately 88,400 square feet, with an average property footprint (including parking) of 234,600 square feet, suggesting that more than five acres is likely required to accommodate the needs of a diverse biking and action sports audience.

Eighty (80) percent of the facilities reviewed offer a BMX track, while a minority feature other offerings such as mountain bike training, mountain bike track, skate, and/or BMX freestyle facilities. To differentiate itself among other facilities nationally, a Central Iowa Action Sports Facility could include some combination of these ancillary amenities.

Key	Facility	Market	Building/ Course Footprint Square Footage	Property Footprint Square Footage	Indoor/ Outdoor/ Covered	BMX Track (Y/N)	BMX Freestyle (Y/N)	Mountain Bike Track (Y/N)	Mountain Bike Training (Y/N)	Skate (Y/N)
1	Rum River BMX	Isanti, MN	75,793	138,215	Indoor	Y	N	N	N	N
2	Okeeheelee BMX	West Palm Beach, FL	79,234	335,254	Outdoor	Y	N	N	N	N
3	Rock Hill BMX Supercross Track	Rock Hill, SC	118,246	913,707	Outdoor	Y	N	N	N	N
4	Hardesty National BMX Stadium	Tulsa, OK	136,189	373,165	Covered	Y	N	N	N	N
5	RockStar Energy Bike Park	Houston, TX	195,000	788,753	Outdoor	Y	Y	N	Y	Y
6	Steelwheels Indoor BMX	Hobart, IN	40,556	62,961	Indoor	Y	N	N	N	N
7	Rays Indoor Mountain Biking	Cleveland, OH	310,601	577,868	Indoor	N	N	Y	Y	N
8	Rockford BMX	Rockford, IL	40,107	117,062	Outdoor	Y	N	N	N	N
9	Raytown BMX Track	Kansas City, MO	56,518	83,748	Outdoor	Y	N	N	N	N
10	Waterford Oaks BMX Track	Waterford Township, MI	77,406	128,526	Outdoor	Y	N	N	N	N
11	Durango BMX	Durango, CO	42,420	83,326	Outdoor	Y	N	N	N	N
12	Dayton Indoor BMX	Dayton, OH	42,257	65,492	Indoor	Y	N	N	N	N
13	Duke City BMX	Albuquerque, NM	75,917	256,254	Covered	Y	N	N	N	N
14	Westhoff Plaza Skate and BMX Complex	O'Fallon, MO	10,538	19,342	Outdoor	N	Y	N	Y	Y
15	Mikes Indoor Bike Park	Dayton, OH	25,638	33,584	Indoor	N	N	Y	Y	Y
		AVERAGE	88,400	234,600	% Yes	80.0%	13.3%	13.3%	26.7%	20.0%

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

COMPARABLE BIKE FACILITIES: ONSITE AMENITIES

The analysis of 15 comparable bike facilities highlights a limited inventory of assets designed to maximize usability, revenue, and visitor appeal—elements that are directly relevant to the development of an Indoor Action Sports Complex Central Iowa. However, several facilities have employed programs, building features and onsite amenities to complement their BMX racetracks.

Indoor and covered facilities, such as Rum River BMX (MN), Rays Indoor Mountain Biking (OH), and Steelwheels Indoor BMX (IN), demonstrate the advantage of extended usability across all seasons. These facilities provide year-round access, particularly in colder climates, making them vital models for the potential Central Iowa Complex. The presence of pro shops, as seen at facilities like Rock Hill BMX Supercross Track (SC) and Mikes Indoor Bike Park (OH), adds a supplementary revenue stream by catering to the needs of riders and visitors.

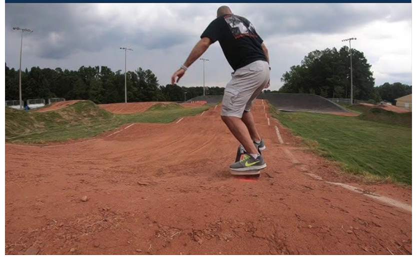
RockStar Energy Bike Park (TX) integrates BMX training, a skatepark, pump tracks, and mountain bike training, while Rays Indoor Mountain Biking includes lounge areas and bike rental options to enhance the visitor experience. Similarly, the Rock Hill BMX Supercross Track supports its operations with RV parking, offices, and multi-purpose fields, making it a hub for events and gatherings. The inclusion of concessions, youth tracks, lounge areas, and elevated viewing platforms (as seen at facilities like Rum River BMX, Rays Indoor Mountain Biking, and Dayton Indoor BMX) ensures that these locations cater to both participants and spectators. These additional amenities not only improve visitor satisfaction but also encourage longer stays and repeat visits.

The facilities demonstrate that a mix of core biking amenities, supplementary revenue opportunities, and multi-purpose features can significantly enhance the attraction potential and operational success of an Action Sports Complex. For the Des Moines area, incorporating similar features and strategies will be key to creating a sustainable and dynamic venue that appeals to diverse visitor types and operates effectively year-round.

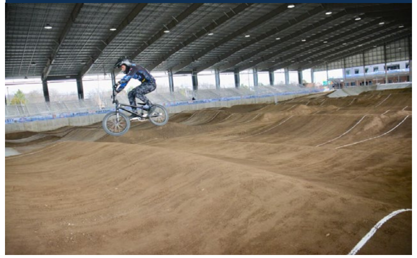
Pro Shops

Concessions

Alternative Sport Types



Indoor vs. Outdoor



Spectator Viewing

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

COMPARABLE BIKE FACILITIES: VISITATION ANALYSIS

Using Placer.ai, CSL analyzed annual visitation levels at each facility. As shown, facilities average a total of 34,900 visits from 9,000 visitors per year, highlighting a smaller, niche user base at each facility relative to the size of population bases in many of the markets reviewed. Visitor growth trends show an average annual increase of 3.2 percent in unique visitors and 5.1 percent in total visits to each facility, indicating steady growth in visitation and BMX participation each year.

Key	Facility	Market	2017 Placer Unique Visitors	2017 Placer Total Visits	2023 Placer Unique Visitors	2023 Placer Total Visits	Visitors - Historic Annual Growth Rate	Visits - Historic Annual Growth Rate
1	Rum River BMX	Isanti, MN	5,900	73,500	7,600	66,100	4.8%	-1.7%
2	Okeeheelee BMX	West Palm Beach, FL	6,800	32,500	6,300	43,000	-1.2%	5.4%
3	Rock Hill BMX Supercross Track	Rock Hill, SC	35,000	127,200	33,700	103,000	-0.6%	-3.2%
4	Hardesty National BMX Stadium	Tulsa, OK	12,500(3)	33,700(3)	16,600	42,200	32.8%	25.2%
5	RockStar Energy Bike Park	Houston, TX	13,300(2)	43,600(2)	11,700	50,800	-3.0%	4.1%
6	Steelwheels Indoor BMX	Hobart, IN	3,200	7,900	4,400	19,600	6.3%	24.7%
7	Rays Indoor Mountain Biking	Cleveland, OH	17,000	54,100	20,600	60,500	3.5%	2.0%
8	Rockford BMX	Rockford, IL	6,300	27,200	5,500	26,900	-2.1%	-0.2%
9	Raytown BMX Track	Kansas City, MO	2,200	15,800	2,100	9,300	-0.8%	-6.9%
10	Waterford Oaks BMX Track	Waterford Township, MI	2,700(1)	5,700(1)	3,500	10,600	5.9%	17.2%
11	Durango BMX	Durango, CO	5,200(1)	13,200(1)	3,900	14,600	-5.0%	2.1%
12	Dayton Indoor BMX	Dayton, OH	1,300(2)	7,800(2)	1,500	7,000	3.8%	-2.6%
13	Duke City BMX	Albuquerque, NM	6,700	42,800	4,100	24,700	-6.5%	-7.0%
14	Westhoff Plaza Skate and BMX Complex	O'Fallon, MO	4,000	19,600	5,700	20,700	7.1%	0.9%
15	Mikes Indoor Bike Park	Dayton, OH	6,900(1)	13,700(1)	7,700	25,000	2.3%	16.5%
		AVERAGE	8,600	34,600	9,000	34,900	3.2%	5.1%

Note: (1) 2018 Data. (2) 2019 Data. (3) 2022 Data.
Source: Facility websites, facility management, News Publications, Placer AI, 2024.

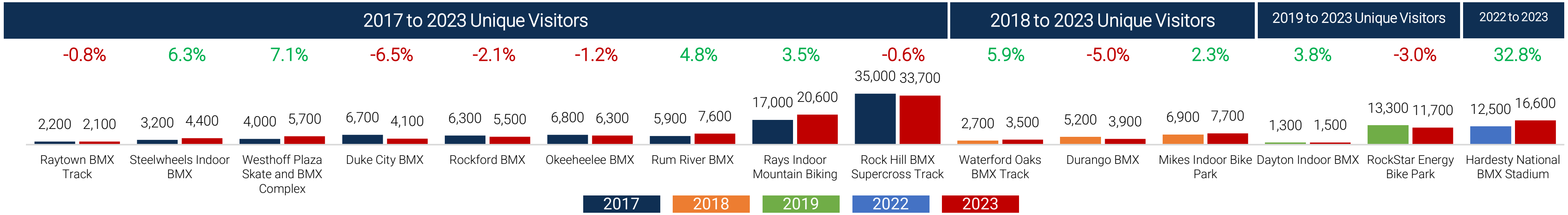
4 COMPARABLE FACILITIES

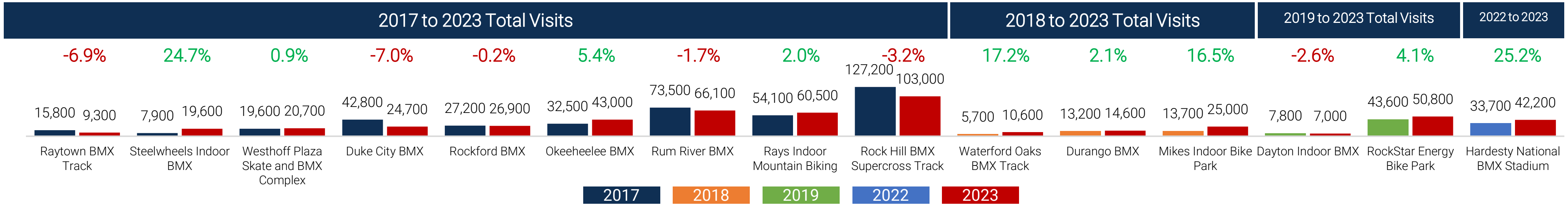
COMPARABLE BIKE FACILITIES

The analysis of changes in visitor utilization at comparable biking facilities reveals valuable insights into market trends and the potential for a new Indoor Action Sports Complex in Central Iowa. Placer.ai provides visitation data going as far back as 2017, though several facilities opened after this year. Visitation data from their opening years were included in CSL's analysis of these newer facilities.

New facilities such as Hardesty National BMX Stadium exhibit higher growth rates, likely reflecting a strong "honeymoon" period following its opening. The Stadium saw a significant 32.8 percent increase in unique visitors from 2022 to 2023, demonstrating a BMX facility's ability to induce interest in the sport within its community. Conversely, more established facilities like Duke City BMX experience slower or even negative growth rates, such as its -6.5 percent decline in unique visitors and -7.0 percent drop in total visits from 2017 to 2023. This trend underscores the importance of unique and broadly appealing facility features and programming that will support visitation levels over time. Notably, Rock Hill BMX Supercross Track, the highest visited BMX facility, exhibits a decrease in visitation from 2017 to 2023. However, this decrease is likely due to its hosting of the UCI World Championships in 2017, which is a significant BMX event attracting worldwide riders and spectators.

Indoor and year-round facilities like Rays Indoor Mountain Biking (3.5 percent annual growth in unique visitors) demonstrate the stabilizing effect of extending usability beyond seasonal limitations and continually improving and replacing bike amenities and offerings. Similarly, venues such as Steelwheels Indoor BMX (6.3 percent growth in unique visitors) highlight how community-driven and versatile indoor spaces can retain steady participation. These trends suggest that a well-designed, multipurpose Indoor Action Sports Complex in the Des Moines metro area could capitalize on the demand for high-quality, modern facilities while similarly mitigating seasonal fluctuations.





Annual Growth Rate

Annual Negative Growth Rate

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – RUM RIVER BMX

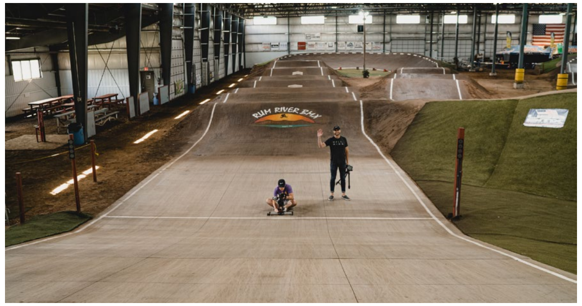
Rum River BMX	
City, State:	Isanti, MN
Market Population:	7,370
Owner:	City
Operator:	Non-Profit
Building Footprint:	75,800 sf
Property Footprint:	138,200 sf
2017 Visits:	73,500
2017 Visitors:	5,900
2023 Visits:	66,100
2023 Visitors:	7,600
Annual Visit Growth Rate:	-1.7%
Annual Visitor Growth Rate:	4.8%
Annual Visit Frequency:	8.70
Visits from 100+ Miles (#):	2,150
Visits from 100+ Miles (%):	3.25%

RUM RIVER BMX OVERVIEW

Rum River BMX, located in Isanti, Minnesota, stands as the only purpose-built indoor BMX track in the United States, positioning itself as a vital hub for BMX enthusiasts in the Midwest. Despite Isanti's small market population of 7,370, the facility attracts riders locally and from afar, with 60 percent of winter participants traveling from other tracks. Visitor origin data highlights its somewhat limited regional draw throughout the year, with 3.25 percent of visits coming from over 100 miles away. The track maintains consistent local rider engagement throughout the year, far exceeding the national average of 12 daily riders at BMX facilities, with averages closer to 24-50. This success is directly tied to its ability to operate year-round, a distinct advantage over outdoor tracks limited to five months of activity. The facility has a total of 986 annual members that call it their home track.

FACILITY & COMMUNITY SUPPORT

Built for $2.6 million in 2010, Rum River BMX represents an efficient development model for BMX facilities. Owned by the City and operated as a nonprofit, the track benefits from extensive community involvement. A team of over 60 volunteers supports operations, with roles ranging from event coordination to track maintenance. The board of directors, comprised of individuals with deep ties to BMX, ensures the facility remains focused on its mission. Volunteer engagement allows the track to minimize operational costs while maintaining high-quality programming and facilities. Community initiatives, such as an in-house beginner program with an 80 percent retention rate, help sustain and grow the sport locally.



Source: Facility websites, facility management, News Publications, Placer AI, 2024.

CASE STUDY – RUM RIVER BMX (continued)

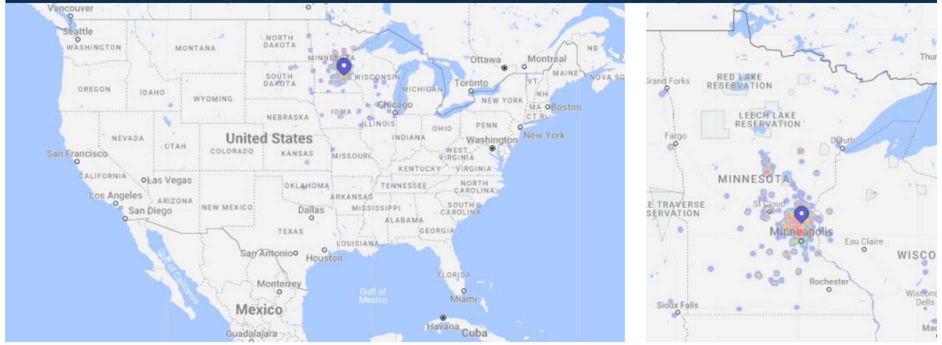
FINANCIAL MODEL

The financial sustainability of Rum River BMX is a testament to its diverse revenue streams and efficient operations. The facility requires $350,000 to $500,000 annually to break even, relying on a combination of rider fees, concessions, donations, and bike rentals. With bike rentals priced at just $4.00 per day and a model designed to maintain affordability rather than maximize profit, the facility prioritizes accessibility and community use. Concessions, with 40-50 percent profit margins, and in-house production of trophies and shirts, help reduce costs while maintaining quality. Incremental fee adjustments every five years ensure financial stability without burdening participants. Despite a slight decline in total annual visits (-1.7 percent), visitor numbers have grown at an annual rate of 4.8 percent, reflecting the facility's ongoing appeal. However, these trends highlight the need for innovative programming and outreach to sustain and grow engagement further.

EVENTS & TOURISM IMPACT

Rum River BMX plays a pivotal role in regional tourism and BMX events, hosting three national events annually and serving as a training hub for riders during winter months. While these events may not generate substantial direct revenue, they act as powerful marketing tools, attracting riders who return to train and compete throughout the year. Visitor maps shown below underscore the facility's local draw and limited national reach, with riders traveling primarily from within Minnesota. With an average visit frequency of 8.7 annually, the track cultivates strong loyalty among its users, making it a central feature of the Midwest BMX community.

Visitor Origin



Key Takeaways

Led by Over 60 Volunteers: The facility thrives on a large, dedicated volunteer base, significantly reducing operational costs and strengthening community involvement.

Increased Economic Impact in Winter: The facility serves as a critical winter destination for riders, driving tourism and economic activity during the colder months.

Capable of Hosting National Events: Regularly hosting three national events each year enhances Rum River's reputation and draws visitors from across the country.

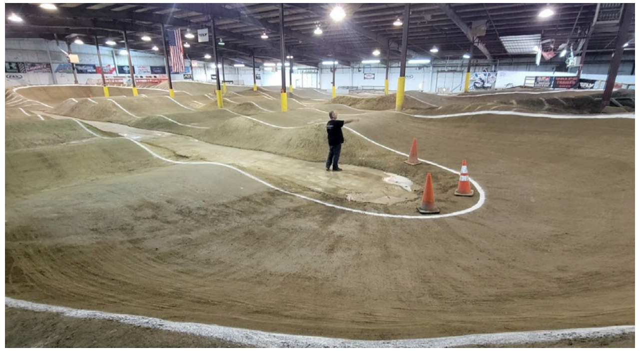
Diversified Revenue Streams and Cost Saving: By producing merchandise and supplies in-house and leveraging a mix of revenue sources, the facility ensures long-term financial sustainability.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – STEELWHEELS BMX

Steelwheels BMX	
City, State:	Hobart, IN
Market Population:	29,800
Owner:	Non-Profit
Operator:	Non-Profit
Building Footprint:	40,600 sf
Property Footprint:	63,000 sf
2017 Visits:	3,200
2017 Visitors:	7,900
2023 Visits:	19,600
2023 Visitors:	4,400
Annual Visit Growth Rate:	24.7%
Annual Visitor Growth Rate:	6.3%
Annual Visit Frequency:	4.45
Visits from 100+ Miles (#):	1,850
Visits from 100+ Miles (%):	9.42%



STEELWHEELS BMX OVERVIEW

Steelwheels BMX, located in Hobart, Indiana, is one of the oldest indoor BMX tracks in the Midwest, with its indoor track opening in 2001, and providing a year-round BMX venue for riders. Operating for nearly 26 years in a leased warehouse facility, the track has become a regional hub, drawing participants from six states and even Canada. Despite its location in a smaller community, the track attracts a notable volume of riders due to the scarcity of similar indoor facilities within a 125-mile radius. It was initially established to address the lack of safe and accessible BMX options for local youth, transitioning from outdoor to indoor to meet the growing demands of the sport during the winter. Steelwheels BMX continues to serve as a critical economic driver for Hobart, where local events often attract participants and spectators to the community, which otherwise lacks large-scale attractions. However, challenges such as increasing rental costs and reliance on volunteers underscore the need for a more sustainable operating model. The facility has a total membership base of 369 members.

FACILITY & COMMUNITY SUPPORT

Steelwheels BMX operates under a lease agreement with a private landlord, and the facility is in a redeveloped warehouse. This arrangement initially included a favorable tax abatement from the City, which allowed for redevelopment and early operational support. However, due to a recent sale of the property to an international company, rental costs have risen sharply, threatening the long-term sustainability of the track. Despite these challenges, the facility benefits from a dedicated volunteer base, including its track operator and community members who invest time and effort to ensure events and daily operations run smoothly. Community involvement has been central to the track's success since its inception, driven by local advocacy for youth-friendly spaces. Steelwheels' ability to attract regional riders speaks to its role as a regional attraction, and its location in a small town like Hobart has positioned it as one of the area's top economic generators. However, with its heavy reliance on volunteers and limited ability to expand programming due to rising costs, the need for a publicly supported or county-owned model is increasing.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – STEELWHEELS BMX (continued)

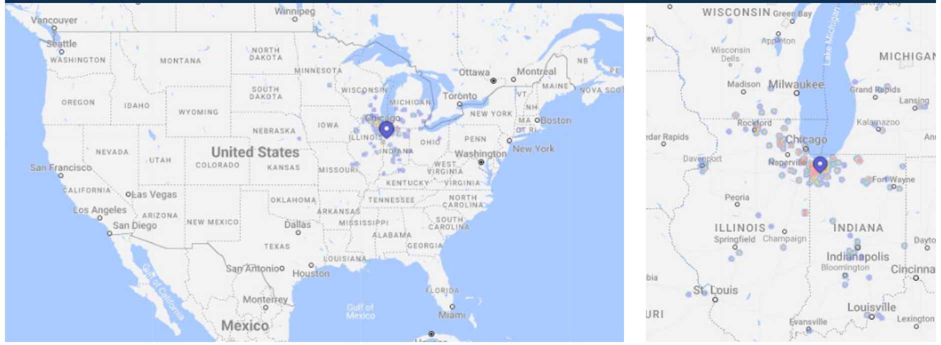
FINANCIAL MODEL

Steelwheels BMX demonstrates the importance of leveraging diversified revenue streams to maintain financial sustainability. The facility generates income through rider fees, concessions, and merchandise sales. However, the challenges of sharply rising rental costs have significantly strained its ability to operate at a surplus. Volunteer labor reduces operational costs but creates challenges for continuity, especially as the facility contemplates succession planning for leadership roles. Unlike Rum River BMX, Steelwheels cannot build trophies or apparel in-house, which could otherwise offer additional revenue or cost savings, but would require increased volunteer efforts. The need for a new facility is critical, with discussions around public ownership or partnership with local government ongoing. Steelwheels could likely benefit from agreements that ensure stability, such as tax abatements or lease-to-own arrangements. These efforts would not only stabilize operations but potentially allow for expanded programming and multi-sport capabilities, which could diversify the facility's appeal and increase revenue.

EVENTS & TOURISM IMPACT

Steelwheels BMX is a prominent player in Hobart's event landscape, hosting a range of races and competitions that drive tourism to the region. The facility draws participants from six states, as well as Canada, highlighting its regional significance and ability to attract out-of-town visitors. While BMX participation nationwide shows steady but limited growth, Steelwheels benefits from strong growth due to its year-round availability, offering riders an essential training ground in winter when outdoor tracks are unavailable. As a critical asset for Hobart, the facility demonstrates the economic potential of BMX tracks in smaller markets. Key takeaways from Steelwheels as case study include the need for sustainable infrastructure and public-private partnerships to ensure long-term viability. Further, by diversifying its offerings to include multi-sport options or spectator-driven events, Steelwheels could unlock additional tourism opportunities and mitigate financial pressures. These steps would align with the facility's core mission of providing safe and accessible spaces for BMX riders while fostering economic and community development.

Visitor Origin



Key Takeaways

Volunteer Created and Ran: The facility relies on a dedicated team of volunteers, which helps minimize operational expenses while fostering strong community engagement.

Increased Economic Impact in Winter: The facility functions as an essential winter hub for riders, boosting tourism and generating economic activity throughout the colder season.

Somewhat Undersized, Limits Ability to Host National Events: Due to limited track length, the facility is unable to host the most impactful BMX races and events.

Became a Leading Economic Impact Driver for a Small Town: Located in a small town with limited attractions, it serves as a primary economic driver for the market.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – MIKE'S BIKE PARK

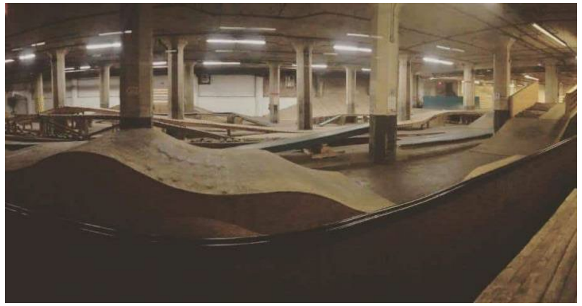
Mike's Bike Park	
City, State:	Dayton, OH
Market Population:	814,000
Owner:	Private
Operator:	Private
Building Footprint:	25,600
Property Footprint:	33,600
2018 Visits:	13,700
2018 Visitors:	6,900
2023 Visits:	35,300
2023 Visitors:	10,000
Annual Visit Growth Rate:	16.5%
Annual Visitor Growth Rate:	2.3%
Annual Visit Frequency:	3.25
Visits from 100+ Miles (#):	920
Visits from 100+ Miles (%):	2.61%

MIKE'S BIKE PARK OVERVIEW

Mike's Bike Park, situated in Dayton, Ohio, is a unique indoor facility catering to a wide range of wheel sports, including BMX, skateboarding, scooters, gravel bikes, and more. Opened in 2017, the facility was initially designed with mountain bikers in mind, but a pivot to accommodate freestyle BMX and scooter riders was necessary after management observed limited usage and willingness to pay among mountain bikers. With a total warehouse space of 70,000 square feet and a footprint of approximately 25,000 square feet, Mike's Bike Park stands out for its multi-floor design that offers dedicated spaces tailored to different riding styles. Its inclusivity and adaptability have made it a hub for younger riders under 30, with a loyal customer base drawn to its welcoming environment. Despite the lack of public or significant private funding, Mike's Bike Park has carved out its niche as a community-oriented business with a growing annual ridership of 10-15 percent.

FACILITY & COMMUNITY SUPPORT

From the outset, Mike's Bike Park has prioritized creating a safe and inclusive space for riders of all skill levels. Its flexibility to adapt to community needs has fostered a dedicated user base, with many riders actively involved in building, cleaning, and maintaining the park. The facility employs 16 staff members, including four full-time employees, ensuring a consistent operational presence and robust programming. In addition to its riding spaces, Mike's incorporates a bike and skate shop occupying 5,000 square feet and a 10,000-square-foot studio space for musicians, with studio revenue supplementing overall operations and bike/skate-related retail accounting for 75 percent of its wheel sports-related. This diversified approach to revenue generation supports the park's operations, especially during summer months when indoor ridership notably declines. Local police and community programs further bolster the facility's reputation by referring youth to the park as a safe riding alternative, emphasizing its importance as a positive community resource.



Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – MIKE'S BIKE PARK (continued)

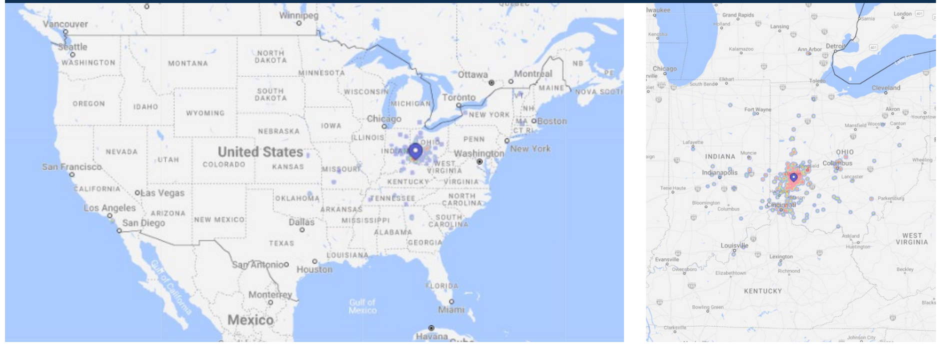
FINANCIAL MODEL

Mike's Bike Park's for-profit model hinges on its diversified income streams rather than solely relying on rider fees. Retail sales from the pro shop serve as the primary revenue source, supplemented by daily passes, monthly memberships, and studio space rental. The park's membership program, priced at $50 per month, yields 250-300 regular users, reflecting strong customer loyalty. Despite rising operational costs and the lack of external funding, Mike's has maintained consistent financial growth by continually investing in new features to attract new riders and repeat utilization. Notably, its ability to remain financially stable even during slower riding periods demonstrates the effectiveness of its business model. However, the facility's capital costs are significant, with $750,000 worth of lumber used for its tracks alone, underscoring the capital-intensive nature of running such a facility. Management also noted that private investment for this type of facility is mostly unattainable, with private lenders requiring a return on investment faster than a facility of this type could realistically generate.

EVENTS & TOURISM IMPACT

Mike's Bike Park hosts numerous community-oriented "jam" events, which bring together riders for informal gatherings focused on fun rather than competition. These events contribute to a strong sense of community while attracting very few visitors from outside of Dayton. The facility's inclusive approach to all types of wheel sports broadens its appeal, creating an environment where bikes, skateboards, scooters, and other wheeled devices can coexist. Despite its relatively small market compared to other indoor parks, such as Ray's Indoor Mountain Biking, Mike's leverages its versatility and positive reputation to maintain a loyal following. Its emphasis on inclusivity, safety, and continuous improvement has positioned it as a model for similar facilities, especially in underserved areas. Looking ahead, Mike's Bike Park could benefit from expanded space and additional resources to accommodate a growing rider base while continuing to drive community impact in Dayton.

Visitor Origin



Key Takeaways

Continually Rotating Amenities & Features:
Mike's credits its success in attracting repeat visitors to its continually modified courses and training features.

Operations Majorly Supported by Pro Shop:
Mike's suggests it would be entirely unsuccessful without the supporting revenue of its bike and skate pro shop.

Inclusivity as a Core Operational Principal:
Highlighting inclusivity and a welcoming environment is critical in retaining a loyal and returning rider base.

Private Investment Challenges and Limited Public Support:
The facility is troubled in attracting private investment and public support due to limited returns and economic impact.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

COMPARABLE SKATEPARKS OVERVIEW

The analysis of comparable skate facilities reveals key insights into the potential design and operations of any potential skate-related facilities at an Indoor Action Sports Complex. The seven identified facilities represent a range of indoor or indoor/outdoor skateparks with an average building footprint of 15,200 square feet and property footprint of 50,700 square feet, not including Camp Woodward, which is considered an outlier for this sizing analysis due to its unique multi-faceted campus layout. These facilities feature diverse amenities, including street courses (100 percent inclusion), bowls (57.1 percent), and spectator seating (42.9 percent), with only one facility offering bike-related amenities.

	Facility	Market	Building Footprint Square Footage	Property Footprint Square Footage	Indoor/ Outdoor/ Covered	Street Course (Y/N)	Vert Ramp (Y/N)	Bowl / Park (Y/N)	Spectator Seating (Y/N)	Bike Amenities (Y/N)
1	CA Training Facility Skatepark	Vista, CA	27,142	68,373	Indoor	Y	N	Y	Y	N
2	3rd Lair - MN	Golden Valley, MN	20,143	52,192	Indoor/Outdoor	Y	Y	Y	N	N
3	Skatepark of Tampa	Tampa, FL	13,031	47,691	Indoor/Outdoor	Y	N	Y	Y	N
4	The Bay	Lincoln, NE	9,975	42,590	Indoor	Y	N	N	N	N
5	Camp Woodward Pennsylvania	Woodward, PA	150,000+	2,042,530	Indoor/Outdoor	Y	Y	Y	Y	Y
6	Familia Skate Shop	Minneapolis, MN	13,430	43,638	Indoor	Y	N	N	N	N
7	Bellevue Indoor Skatepark	Bellevue, WA	7,300	49,947	Indoor/Outdoor	Y	N	N	N	N
			15,200	50,700	% Yes	100.0%	28.6%	57.1%	42.9%	14.3%
	Lauridsen Skatepark	Des Moines, IA	N/A	88,000	Outdoor	Y	N	Y	N	Y

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

COMPARABLE SKATEPARKS: ONSITE AMENITIES

The comparable skatepark facilities analyzed demonstrate a variety of included amenities that enhance their appeal and broaden their market reach. Among these, Camp Woodward Pennsylvania stands out as the most comprehensive facility, offering BMX courses, a half-pipe, swimming, a parkour course, a café, pump tracks, ropes courses, pro shops, go-karts, lounges, cabins, and a cafeteria. This expansive offering positions Camp Woodward as a leader in the action sports market, attracting diverse audiences and extending the duration of visits.

Other facilities like the CA Training Facility in Vista, CA, and the Bellevue Indoor Skatepark in Washington also incorporate additional features that increase their usability and visitor experience. The CA Training Facility supports skate stakeholder tenants (such as clothing brands, skate startups, online skate retailers, street art collectives, etc.) and features a pro shop, which aligns with user needs while generating supplementary revenue. Bellevue Indoor Skatepark is integrated within a community center and city park, enhancing accessibility and its role as a community asset.

Pro shops are a common inclusion across facilities like 3rd Lair, Skatepark of Tampa, and Familia Skate Shop, providing essential equipment and merchandise while supplementing operational revenue. Facilities like The Bay in Lincoln, NE, diversify their offerings further with esports, art, and education programming, aligning with evolving interests among target demographics.

These examples underscore the importance of amenity diversification in driving visitor engagement and financial sustainability for a potential Indoor Action Sports Complex in Central Iowa. By incorporating a strategic mix of sports-specific features, retail options, and complementary activities, the facility can position itself as a leading destination for action sports enthusiasts while generating economic impact for the local community.

Pro Shops

Multi-Sport Amenities

Artistic Inclusions

Spectator Viewing

Office Spaces/Skate Tenants

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

COMPARABLE SKATEPARKS: VISITATION ANALYSIS

Historic annual growth rates for visitors and visits highlight challenges in sustaining or growing participation at skate parks. From 2017 to 2023, the average annual growth rate for unique visitors was 3.4 percent, while total visits declined by -2.8 percent. However, select facilities like Familia Skate Shop experienced positive growth in unique visitors (+8.5 percent) and total visits (+2.2 percent), likely attributed to their indoor environment and focused offerings. The facilities that integrate both indoor and outdoor elements, such as Skatepark of Tampa and 3rd Lair, cater to varied user preferences and have shown resilience in maintaining visitor numbers. Additionally, premium facilities like Camp Woodward Pennsylvania, with expansive property footprints and a range of attractions, have demonstrated the ability to draw high visitation numbers, although growth rates for these larger facilities sometimes face challenges due to competition from other entertainment or leisure destinations. Lauridsen Skatepark opened in 2021; full year visitation from 2022 to 2023 resulted in a decrease in unique visitors by 11.4 percent and a decrease in total visits of 5.5 percent. However, Lauridsen still attracts significant visitation compared to the majority of compared facilities. This can likely be attributed to the free opportunity to utilize the Skatepark.

	Facility	Market	2017 Placer Unique Visitors	2017 Placer Total Visits	2023 Placer Unique Visitors	2023 Placer Total Visits	Visitors - Historic Annual Growth Rate	Visits - Historic Annual Growth Rate
1	CA Training Facility Skatepark	Vista, CA	5,000	15,300	2,700	14,100	-7.7%	-1.3%
2	3rd Lair - MN	Golden Valley, MN	8,100	24,200	7,700	29,400	-0.8%	3.6%
3	Skatepark of Tampa	Tampa, FL	14,900	53,900	16,000	40,500	1.2%	-4.1%
4	The Bay	Lincoln, NE	16,500	38,400	5,700	19,300	-10.9%	-8.3%
5	Camp Woodward Pennsylvania	Woodward, PA	39,800	169,000	16,800	57,300	-9.6%	-11.0%
6	Familia Skate Shop	Minneapolis, MN	4,300	13,400	6,500	15,200	8.5%	2.2%
7	Bellevue Indoor Skatepark	Bellevue, WA	11,100	32,900	7,900	32,200	-4.8%	-0.4%
		AVERAGE	14,200	49,600	9,000	29,700	-3.4%	-2.8%
	Lauridsen Skatepark	Des Moines, IA	35,000(1)	121,400(1)	31,000	114,700	-11.4%	-5.5%

Note: (1) Lauridsen Skatepark opened in 2021. As such, 2022 visitation is listed to determine annual growth rate.
Source: Facility websites, facility management, News Publications, Placer AI, 2024.

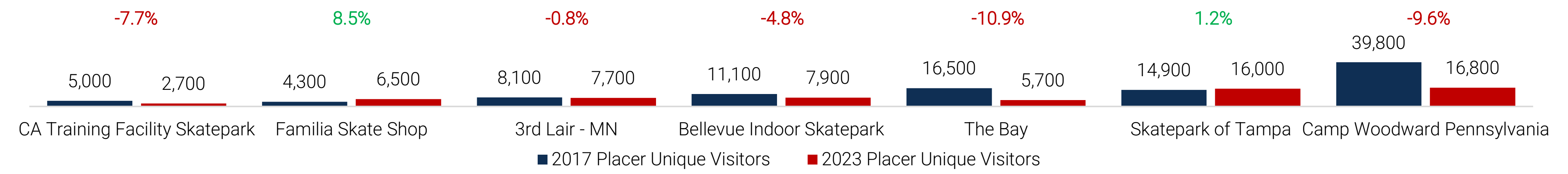
COMPARABLE SKATEPARKS

The data highlight a recurring challenge for skateparks in sustaining consistent growth in visitor activity from year to year. Among the facilities analyzed, growth in unique visitors and total visits is relatively rare, with many experiencing declines. For instance, Camp Woodward Pennsylvania, despite its extensive amenities, has faced a significant drop in unique visitors (-9.6 percent annual growth rate) and total visits (-11.0 percent annual growth rate) between 2017 and 2023. Similarly, The Bay in Lincoln, NE, saw a steep decline in unique visitors (-10.9 percent) and total visits (-8.3 percent). Lauridsen Skatepark, opening in 2021, had a decrease in visitation from 2022 to 2023 of -11.4 percent (35,000 to 31,000) unique visitors and -5.5 percent (121,400 to 114,700) total visits. This can likely be attributed to the conclusion of a 'honeymoon' phase upon the Park's opening.

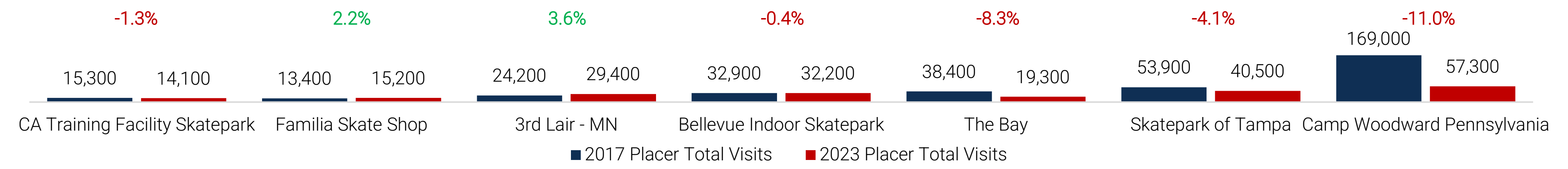
However, there are positive examples, such as Familia Skate Shop in Minneapolis, MN, which achieved an 8.5 percent annual growth rate in unique visitors and a 2.2 percent increase in total visits. Skatepark of Tampa also saw a modest rise in unique visitors (1.2 percent), highlighting the potential for certain facilities to maintain relevance and attract consistent engagement when aligned with evolving user preferences. These preferences include rotating skate features, support for the skate community, and accessibility for different rider types, among others.

These trends underscore the competitive challenges for skateparks and the critical importance of diversifying offerings, improving amenities, and staying connected with community needs. A potential Indoor Action Sports Complex in the Central Iowa area can leverage this insight by creating a multi-functional and adaptable facility that addresses gaps in current offerings, such as indoor accessibility and integrated features for various action sports. With thoughtful planning, the Complex could attract and retain users while mitigating the stagnation or declines observed at comparable skateparks.

2017 to 2023 Unique Visitors



2017 to 2023 Total Visits



Annual Growth Rate

Annual Negative Growth Rate

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – CAMP WOODWARD PENNSYLVANIA

Camp Woodward Pennsylvania	
City, State:	Woodward, PA
Market Population:	114
Owner:	Private
Operator:	Private
Building Footprint:	150,000+
Property Footprint:	2,042,500
2017 Visits:	169,000
2017 Visitors:	39,800
2023 Visits:	35,300
2023 Visitors:	10,000
Annual Visit Growth Rate:	-11.0%
Annual Visitor Growth Rate:	-9.6%
Visit Frequency:	3.53
Visits from 100+ Miles (#):	25,254
Visits from 100+ Miles (%):	71.54%

CAMP WOODWARD PENNSYLVANIA OVERVIEW

Camp Woodward Pennsylvania, established in 1970 in rural Pennsylvania, started as a gymnastics-focused summer camp but has since evolved into a premier action sports and gymnastics facility. This location laid the foundation for the global Woodward brand, which now includes eight locations across the U.S., with another being developed in Sydney, Australia. The facilities offer industry-leading training in skateboarding, BMX, gymnastics, parkour, cheerleading, and other sports. Known for its innovative approach, Camp Woodward has become a launching pad for professional athletes, with a significant proportion of U.S. Olympic medalists in these sports having trained here. The brand's global reputation underscores its leadership in experiential sports programming and the development of top-tier athletic talent. The flagship facility is in rural Pennsylvania in a community of only 114 residents and over 150 miles from Philadelphia and Pittsburgh metropolitan population bases. The camp draws a substantial number of participants from over 100 miles away, with 71.54 percent of visits originating from this distance.

FACILITY & AMENITIES

The Pennsylvania campus boasts over 150,000 square feet of state-of-the-art indoor training facilities, with nearly a million square feet of outdoor training spaces, all within a sprawling property of approximately 45 acres. With over 30 dedicated spaces, the camp offers unique amenities such as airbag ramps, foam pits, gymnastics centers, professional skateparks, biking trails, and a street league-certified skateboarding plaza. Campers also enjoy access to overnight cabins. Beyond its action sports programming, Woodward caters to a wide range of interests, from ropes courses and go-karting to specialized training for aspiring professionals. The campus seamlessly integrates multi-sport opportunities with professional coaching, ensuring participants receive a well-rounded athletic experience. This diversity of amenities contributes to Woodward's status as a global leader in action sports training and events, appealing to both recreational and competitive athletes.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – CAMP WOODWARD PENNSYLVANIA (continued)

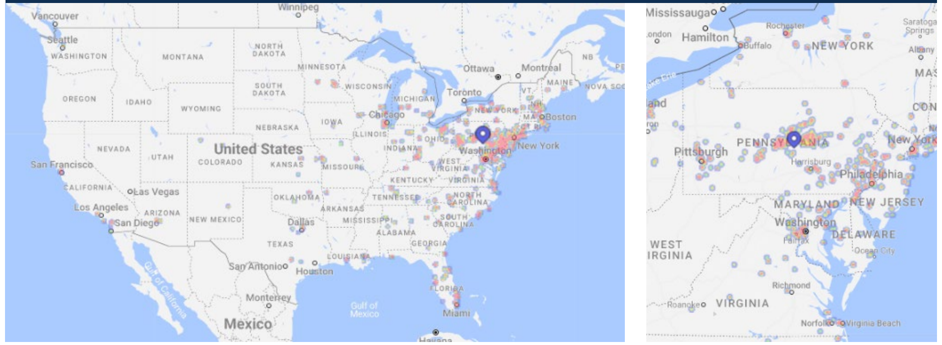
PERFORMANCE AND TOURISM DRAW

Camp Woodward Pennsylvania's reputation as a global leader in action sports draws thousands of participants annually from across the U.S. and internationally. Its high visitation frequency of 3.53 per visitor reflects the strong loyalty of its user base. However, declining annual visits and visitors (-11.0 percent and -9.6 percent, respectively) highlight challenges in maintaining engagement in a rapidly changing sports tourism landscape. These diminishing numbers could also be attributed to Woodward's expansion into new markets in the Western US, allowing action sports enthusiasts in that half of the country to avoid travel to rural Pennsylvania. Despite decreasing visitation at its Pennsylvania campus, Woodward continues to attract attention from elite athletes and brands, partnering with organizations like Red Bull to host high-profile events and activations, such as the Red Bull Boarding Pass event in which skate teams competed for an all-expense-paid trip to the Red Bull Terminal Takeover in New Orleans. Its rural location offers lower operating costs and a more controlled environment for large-scale events, making it a unique destination for both athletes and families.

ECONOMIC IMPACT

Camp Woodward Pennsylvania serves as a critical economic driver for its rural community, generating significant local spending through visiting families and athletes. However, due to its private ownership model and inclusion of dining, lodging and other amenities onsite, it retains much of visitor spending within its campus. On the other hand, seasonal and year-round employment opportunities for coaches, counselors, and support staff strengthen its economic contributions. With its proven track record of boosting tourism and hosting internationally recognized events, Woodward has become a model for integrating action sports into local economies. The Camp's ability to attract visitors from hundreds of miles away highlights its potential for replication in new markets like Central Iowa, where local partnerships, incentives, and strong community demographics could support a new Woodward location. Aligning with Woodward's emphasis on creating consistent user bases and expanding action sports access, a Midwest expansion would not only benefit the region but also reinforce Woodward's role as an innovator in action sports culture and development.

Visitor Origin



Key Takeaways

Grew Into a Vast Range of Sports and Amenities Over Time: Started with a focus on gymnastics and grew into a catch-all concept for action sports enthusiasts.

Indoor Facilities Allow for Winter Operations: Indoor spaces keep skate and bike visitors attending the facility in cold months. Similarly, snowboarding and skiing amenities support off-season activity.

Identified a Successful Business Model Through a Plethora of Offerings: The multi-sport concept heightens Woodward's ability to capture different action sport enthusiast types and strong brand identity.

Rural Location Promotes Lower Operational Costs: Woodward PA is positioned in a small, rural community, decreasing operational costs such as additional developments and land acquisition.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – CAMP WOODWARD PENNSYLVANIA continued

AMENITIES AND LOCATIONS

The following images depict Woodward's locations throughout the US and the many amenities that are offered at its flagship Pennsylvania facility. There are over 30 amenities related to action sports that create an ecosystem and identity of a unique action sports facility concept.

Images of Camp Woodward Pennsylvania's Offered Amenities

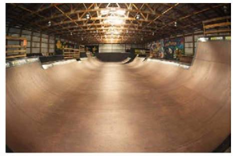

TOWN CENTRE


THE SCHOOL


THE ROCK


THE POOL


THE PLAZA


THE PLAYGROUND


THE PEAK


THE GRIND

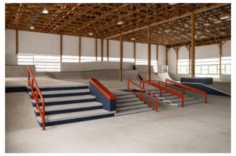

THE CAGE 2.0


THE BLOCK


STREET LEAGUE SKATEBOARDING (SLS) PLAZA


SNAKE RUN


SMALL DIRT


SANDLOT EAST


ROPES COURSE

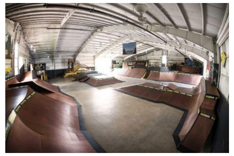

PROGRESSION CENTRE

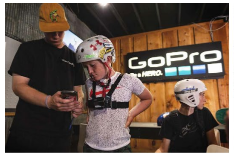

PRO SHOP


NURSE'S STATION


MINI MEGA


MAIN CAMP OFFICE


LOT 8


GOPRO LAB

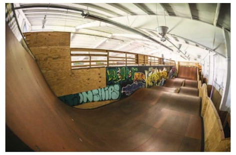

GO-KARTS


F BOWL


BIG DIRT


ATHLETIC TRAINING ROOM


EGYPT


CLOUD 9


CANTEEN


CAFETERIA


CABINS


BMX RACE TRACK

Source: Facility website, facility management, News Publications, Placer AI, 2024.

CASE STUDY – CA TRAINING FACILITY SKATEPARK

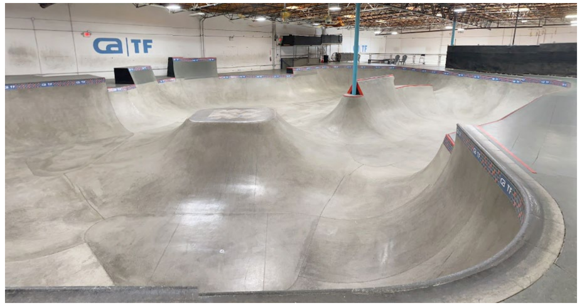
CA Training Facility Skatepark	
City, State:	Vista, CA
Market Population:	98,300
Owner:	Private
Operator:	Private
Building Footprint:	27,100
Property Footprint:	68,400
2017 Visits:	15,300
2017 Visitors:	5,000
2023 Visits:	14,100
2023 Visitors:	2,700
Annual Visit Growth Rate:	-1.3%
Annual Visitor Growth Rate:	-7.7%
Visit Frequency:	5.22
Visits from 100+ Miles (#):	1,686
Visits from 100+ Miles (%):	11.96%

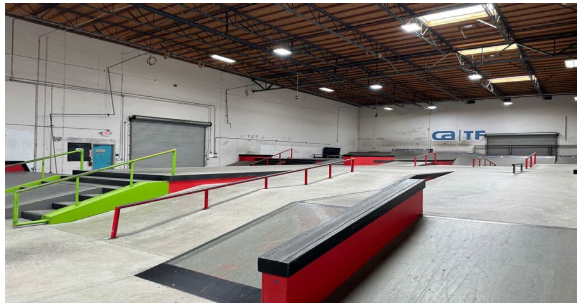
CA TRAINING FACILITY SKATEPARK OVERVIEW

Located in Vista, California, the CA Training Facility (CA-TF) Skatepark is the world's first high-performance training center specifically designed for skateboarding. Established by California Skateparks, CA-TF serves as the official training facility for the USA Skateboarding National Team and Olympic athletes. Built to Olympic standards, the facility includes cutting-edge amenities tailored for the two primary Olympic skateboarding disciplines: street and park. Beyond its role as a training hub for elite athletes, CA-TF positions itself as a resource for advancing skateboarding as a sport, offering a platform for hosting major events, youth programs, and community gatherings. Situated in the skateboarding capital of Southern California, the facility benefits from its proximity to a robust skate culture and industry, attracting both professional athletes and aspiring skaters from across the globe.

FACILITY & AMENITIES

The CA Training Facility offers state-of-the-art skateboarding features, including Olympic-level street courses, a large bowl and vert ramps, and modular features that can adapt to the evolution of the sport. The indoor skatepark is complemented by seating and viewing areas to accommodate spectators. Beyond its skate features, the facility includes support amenities such as a pro shop, workshop spaces, and athlete lounges, ensuring a comprehensive and welcoming environment for skaters of all skill levels. The modular design and exclusive access to Olympic-grade training spaces make it an unparalleled resource for the skateboarding community. These features also underscore its versatility, with spaces that can double as event venues for competitions, showcases, and workshops.





Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

CASE STUDY – CA TRAINING FACILITY SKATEPARK (continued)

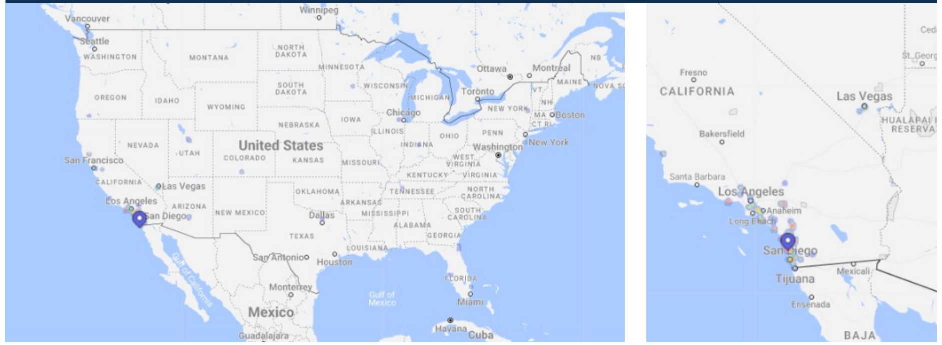
PERFORMANCE AND TOURISM DRAW

As the primary training site for USA Skateboarding, CA-TF attracts athletes preparing for international competitions, including the Olympics. This reputation bolsters its international profile, making it a sought-after destination for elite skaters. While its target demographic includes professional athletes, the facility also runs programs and events catering to youth and emerging talent. The focus on structured training aligns with trends in skateboarding, where parents increasingly seek safe and supervised environments for their children. Although indoor skateparks face profitability challenges in warm-weather climates like California, CA-TF benefits from its position as a center of excellence within the skateboarding industry. Its reputation and connection to Olympic skateboarding position it as a significant contributor to Southern California's skate tourism, attracting visitors for events, training camps, and experiential programming. Still, the facility has experienced somewhat diminishing visits in recent years, decreasing by about 1.3 percent annually since 2017, and a shrinking unique visitor base, decreasing by 7.7 percent annually since 2017.

ECONOMIC IMPACT

The CA Training Facility Skatepark serves as a somewhat limited driver of economic activity in Vista and the broader Southern California region. Only 11.96 percent of visitors travel from over 100 miles away, with its primary user base consisting of locals and drive-in visitors from the immediate region. However, by hosting national and international competitions, CA-TF stimulates some local sales in the hospitality, retail, and entertainment industries. Its role as a training facility for USA Skateboarding provides economic benefits beyond tourism, supporting jobs in coaching, event management, and facility operations. The facility's impact extends beyond its somewhat limited economic contributions; it plays a pivotal role in shaping the perception of skateboarding as a professional and structured sport. Through its partnerships with sponsors, community programs, and collaborations with brands like Red Bull, CA-TF helps elevate the skateboarding industry while promoting Vista as a hub for action sports innovation. Its success underscores the importance of aligning community needs, athlete development, and event hosting to sustain long-term impact.

Visitor Origin



Key Takeaways

Olympic-Caliber Amenities:
The facility's high-caliber amenities and support staff yield a positive identity within the skateboarding community.

Structured Approach and Professional Identity:
An increasing number of athletes and parents desire a more structured skateboarding industry and environment.

Greatly Supported by Local Rider Base:
Local ridership makes up a majority of facility utilization, greatly supporting its sustainability of operations.

Built In a Market with Existing Skateboarding Identity:
The existing skateboarding identity of Vista and San Diego played a major role in the positioning of the facility and its likelihood of success.

Source: Facility websites, facility management, News Publications, Placer AI, 2024.

4 COMPARABLE FACILITIES

COMPARABLE FACILITY DEMOGRAPHICS

The Des Moines / Central Iowa's drivetime markets demonstrate moderate to strong demographic characteristics relative to the 23 markets analyzed, making it a promising location for a potential Indoor Action Sports Complex. Within a 30-minute drivetime, Des Moines supports a population of 666,717, ranking 17th among markets. However, the area ranks competitively in household income, with an average of $118,342 at 30 minutes (8th overall).

The median age in Des Moines is 36.4, positioning it among the younger markets analyzed and aligning well with the age groups most likely to engage in action sports. Markets like The Bay in Lincoln, NE, and Rockstar Energy Bike Park in Houston, TX, with similarly young median ages, demonstrate the appeal of these facilities to active and younger audiences. Des Moines' combination of a sizable regional population, strong income levels, and an active demographic base suggests it could support a thriving Indoor Action Sports Complex, drawing participants locally and regionally while creating opportunities for sponsorship and community engagement.

Population

	Market	30-min	90-min	180-min
5	RockStar Energy Bike Park	3,189,277	8,150,127	13,621,834
6	Familia Skate Shop	2,599,514	4,549,968	6,494,108
2	3rd Lair - MN	2,450,549	4,455,481	6,440,135
7	Bellevue Skatepark	1,862,201	4,676,650	6,797,004
3	Skatepark of Tampa	1,515,359	6,655,045	13,007,185
9	Raytown BMX Track	1,334,400	2,900,482	5,957,196
7	Rays Indoor Mountain Biking	1,312,881	4,260,391	15,985,234
10	Waterford Oaks BMX Track	1,222,040	6,439,834	11,345,070
2	Okeeheelee BMX	1,075,012	6,481,653	12,772,181
1	CA Training Facility Skatepark	974,890	9,304,769	21,777,661
15	Mikes Indoor Bike Park	908,947	5,795,126	16,707,567
12	Dayton Indoor BMX	893,485	5,767,435	16,568,636
4	Hardesty National BMX Stadium	843,870	1,757,870	6,459,179
13	Duke City BMX	766,760	1,116,782	1,464,100
14	Westhoff Plaza Skate and BMX Complex	739,716	3,094,242	5,926,238
3	Rock Hill BMX Supercross Track	696,194	4,305,953	12,988,076
	Lauridsen Skatepark	666,137	1,184,475	5,689,566
6	Steelwheels Indoor BMX	528,715	8,590,833	20,764,721
8	Rockford BMX	360,791	5,562,347	16,364,283
4	The Bay	346,932	1,599,111	3,655,132
1	Rum River BMX	237,945	4,070,790	6,069,150
11	Durango BMX	45,630	196,117	408,561
5	Camp Woodward Pennsylvania	24,540	936,807	10,440,252
	Average Rank (out of 23)	1,069,382 17	4,428,360 20	10,334,916 20

Average Household Income

	Market	30-min	90-min	180-min
7	Bellevue Skatepark	$184,556	$155,193	$141,492
1	CA Training Facility Skatepark	$160,113	$142,306	$132,313
3	Rock Hill BMX Supercross Track	$131,503	$105,691	$98,158
10	Waterford Oaks BMX Track	$130,040	$102,254	$99,225
6	Familia Skate Shop	$126,973	$124,907	$115,286
2	3rd Lair - MN	$126,786	$125,303	$115,523
1	Rum River BMX	$125,483	$127,040	$116,852
	Lauridsen Skatepark	$118,342	$106,626	$98,611
14	Westhoff Plaza Skate and BMX Complex	$117,021	$106,389	$96,060
5	RockStar Energy Bike Park	$115,878	$114,844	$113,044
2	Okeeheelee BMX	$113,327	$109,834	$107,913
11	Durango BMX	$109,888	$90,532	$84,099
3	Skatepark of Tampa	$105,355	$104,006	$102,775
9	Raytown BMX Track	$103,937	$105,071	$95,487
4	The Bay	$99,520	$106,438	$100,593
4	Hardesty National BMX Stadium	$97,203	$89,966	$88,634
13	Duke City BMX	$96,530	$97,393	$93,227
15	Mikes Indoor Bike Park	$96,421	$105,090	$98,314
12	Dayton Indoor BMX	$96,405	$105,133	$98,376
7	Rays Indoor Mountain Biking	$93,580	$93,880	$98,951
8	Rockford BMX	$91,717	$124,142	$113,260
5	Camp Woodward Pennsylvania	$91,091	$88,751	$109,227
6	Steelwheels Indoor BMX	$89,863	$117,829	$109,411
	Average Rank (out of 23)	$113,980 8	$110,809 10	$105,514 15

Median Age

	Market	30-min	90-min	180-min
4	The Bay	35.2	36.8	37.4
5	RockStar Energy Bike Park	35.3	35.9	36.2
	Lauridsen Skatepark	36.4	37.5	38.0
7	Bellevue Skatepark	37.1	38.1	38.7
2	3rd Lair - MN	37.3	38.2	39.1
3	Rock Hill BMX Supercross Track	37.3	38.9	39.7
4	Hardesty National BMX Stadium	37.4	38.4	37.7
6	Familia Skate Shop	37.6	38.2	39.1
9	Raytown BMX Track	37.7	38.2	38.2
3	Skatepark of Tampa	38.1	43.8	44.7
14	Westhoff Plaza Skate and BMX Complex	39.6	39.9	40.2
6	Steelwheels Indoor BMX	39.6	38.8	38.8
13	Duke City BMX	39.8	41.0	41.2
1	Rum River BMX	40.0	38.2	39.1
1	CA Training Facility Skatepark	40.2	38.2	38.3
15	Mikes Indoor Bike Park	40.2	38.3	39.0
12	Dayton Indoor BMX	40.2	38.3	38.9
8	Rockford BMX	40.2	40.5	39.3
5	Camp Woodward Pennsylvania	40.8	41.0	41.7
7	Rays Indoor Mountain Biking	41.0	42.3	40.8
11	Durango BMX	41.5	40.4	40.1
10	Waterford Oaks BMX Track	41.9	40.1	40.2
2	Okeeheelee BMX	44.6	43.7	43.1
	Average Rank (out of 23)	39.1 3	39.3 3	39.5 4

Bike Facility   Skate Facility

Note: Sorted by 30-minute drivetime. Median age is ranked from youngest to oldest.
Source: Esri, 2024.

4 COMPARABLE FACILITIES

COMPARABLE FACILITY DEMOGRAPHICS

Though broad population and socioeconomic statistics suggest a viable market for a Complex in the Des Moines / Central Iowa region, the area does lag comparable markets in terms of its recreation and bicycle industries. In entertainment and recreation spending, Des Moines ranks 16th at 30 minutes with $1.8 billion, 20th at 90 minutes with $8.1 billion and 19th at 180 minutes with $15.9 billion, reflecting limited regional spending habits. Markets like Rockstar Energy Bike Park in Houston and Familia Skate Shop in Minneapolis, with higher spending figures, highlight the potential of such investments in attracting diverse audiences.

For mountain biking participation, Des Moines ranks 17th at 30 minutes with 17,806 participants. Similarly, Des Moines' bicycle sales are below the median, ranking 15th at $22.1 million at 30 minutes and growing to $38.8 million at 90 minutes and $167.5 million at 180 minutes. However, considering the area's more limited population base, both entertainment/recreation spending and bicycle sales per capita are likely much higher in the Des Moines / Central Iowa region relative to many of its peers.

Entertainment/Recreation Spending (in $000s)

	Market	30-min	90-min	180-min
7	Bellevue Skatepark	$4,982,630	$10,041,083	$13,356,376
5	RockStar Energy Bike Park	$4,833,693	$11,906,033	$20,278,593
6	Familia Skate Shop	$4,764,386	$8,055,362	$10,960,764
2	3rd Lair - MN	$4,496,749	$7,890,125	$10,885,458
10	Waterford Oaks BMX Track	$2,398,028	$9,842,848	$16,842,759
3	Skatepark of Tampa	$2,271,769	$10,168,306	$19,831,131
9	Raytown BMX Track	$2,080,598	$4,445,460	$8,428,928
7	Rays Indoor Mountain Biking	$1,973,821	$6,267,926	$24,234,762
1	CA Training Facility Skatepark	$1,965,907	$15,722,793	$34,494,565
2	Okeeheelee BMX	$1,768,672	$9,967,562	$19,285,623
3	Rock Hill BMX Supercross Track	$1,348,317	$6,558,070	$18,788,438
15	Mikes Indoor Bike Park	$1,346,785	$8,948,287	$24,374,061
12	Dayton Indoor BMX	$1,325,572	$8,910,464	$24,167,696
14	Westhoff Plaza Skate and BMX Complex	$1,253,403	$4,942,118	$8,681,594
4	Hardesty National BMX Stadium	$1,177,823	$2,283,621	$8,266,253
	Lauridsen Skatepark	$1,135,861	$1,880,576	$8,379,749
13	Duke City BMX	$1,108,743	$1,626,236	$2,027,638
6	Steelwheels Indoor BMX	$685,683	$14,392,648	$32,772,214
4	The Bay	$501,459	$2,449,342	$5,410,155
8	Rockford BMX	$489,782	$9,825,373	$26,979,183
1	Rum River BMX	$393,984	$7,300,701	$10,335,065
11	Durango BMX	$77,229	$256,137	$487,467
5	Camp Woodward Pennsylvania	$32,508	$1,262,185	$16,719,504
	Average	$1,844,061	$7,171,446	$15,912,521
	Rank (out of 23)	16	20	19

Participated In Bicycling (Mountain)

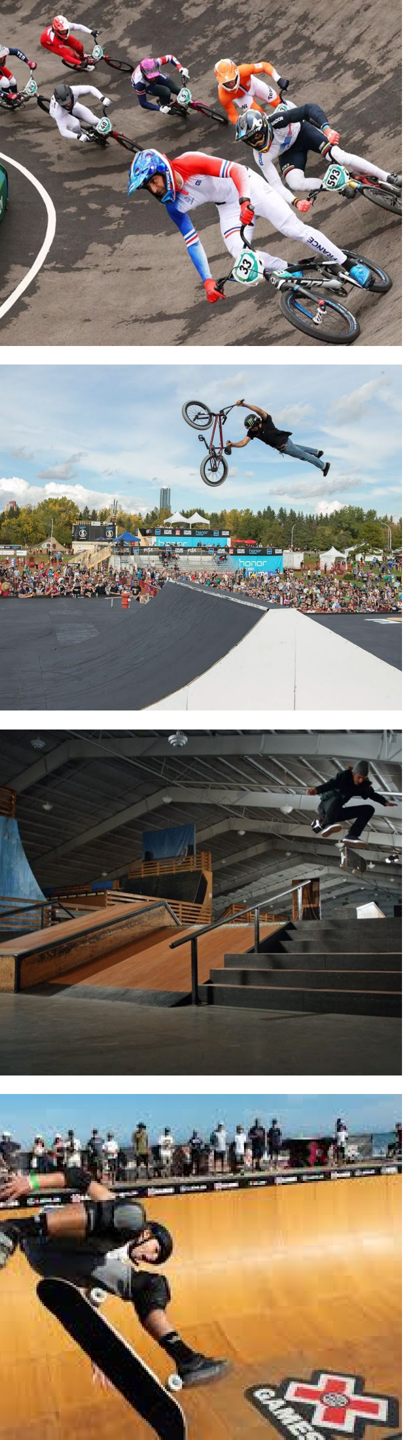
	Market	30-min	90-min	180-min
5	RockStar Energy Bike Park	85,713	216,332	357,090
6	Familia Skate Shop	73,735	126,645	171,156
2	3rd Lair - MN	69,428	124,123	169,846
7	Bellevue Skatepark	59,774	141,347	197,632
3	Skatepark of Tampa	41,824	173,655	336,831
10	Waterford Oaks BMX Track	34,294	156,577	271,559
9	Raytown BMX Track	34,067	73,381	143,525
7	Rays Indoor Mountain Biking	30,398	99,255	380,705
1	CA Training Facility Skatepark	29,499	278,196	639,441
2	Okeeheelee BMX	28,086	178,598	347,253
15	Mikes Indoor Bike Park	21,192	143,348	402,541
12	Dayton Indoor BMX	20,813	142,701	399,451
13	Duke City BMX	20,641	29,767	37,250
4	Hardesty National BMX Stadium	20,607	40,157	148,329
3	Rock Hill BMX Supercross Track	19,612	107,858	313,674
14	Westhoff Plaza Skate and BMX Complex	19,577	76,169	136,895
	Lauridsen Skatepark	17,806	29,328	136,754
6	Steelwheels Indoor BMX	11,726	221,751	523,048
4	The Bay	9,234	40,066	88,575
8	Rockford BMX	8,209	152,785	420,263
1	Rum River BMX	6,683	114,402	161,746
11	Durango BMX	1,324	4,780	9,478
5	Camp Woodward Pennsylvania	524	21,649	262,441
	Average	28,903	117,081	263,282
	Rank (out of 23)	17	21	20

Bicycle Sales (in $000s)

	Market	30-min	90-min	180-min
7	Bellevue Skatepark	$97,397	$201,975	$268,258
5	RockStar Energy Bike Park	$93,720	$234,419	$395,670
6	Familia Skate Shop	$90,934	$157,856	$221,180
2	3rd Lair - MN	$85,743	$154,650	$219,784
10	Waterford Oaks BMX Track	$44,626	$180,404	$321,155
3	Skatepark of Tampa	$43,805	$202,306	$392,267
1	CA Training Facility Skatepark	$41,081	$328,447	$711,387
9	Raytown BMX Track	$38,268	$85,084	$164,972
2	Okeeheelee BMX	$35,358	$196,551	$383,641
7	Rays Indoor Mountain Biking	$34,427	$116,866	$457,376
3	Rock Hill BMX Supercross Track	$26,615	$124,727	$351,268
15	Mikes Indoor Bike Park	$24,787	$170,084	$467,989
12	Dayton Indoor BMX	$24,396	$169,347	$464,037
14	Westhoff Plaza Skate and BMX Complex	$23,713	$92,180	$168,694
	Lauridsen Skatepark	$22,116	$38,761	$167,513
4	Hardesty National BMX Stadium	$22,047	$42,971	$157,707
13	Duke City BMX	$21,163	$31,049	$38,221
6	Steelwheels Indoor BMX	$12,220	$270,607	$628,527
4	The Bay	$9,459	$48,095	$109,264
8	Rockford BMX	$9,031	$192,354	$515,300
1	Rum River BMX	$7,888	$142,937	$207,097
11	Durango BMX	$1,511	$4,870	$9,199
5	Camp Woodward Pennsylvania	$763	$25,524	$324,647
	Average	$35,264	$139,655	$310,659
	Rank (out of 23)	15	20	18

Bike Facility Skate Facility

Note: Sorted by 30-minute drivetime.
Source: Esri, 2024.



MARKET DEMAND & OPPORTUNITIES

5 MARKET DEMAND & OPPORTUNITIES

OVERVIEW & METHODS

The purpose of this chapter is to provide an analysis of event organizer and local stakeholder demand for a potential Indoor Actions Sports Complex in the Central Iowa area. The data generated as part of this market analysis have been derived from the following:

- Experience gained from 2,000 sports, entertainment, hospitality, convention, conference, exhibition, and event facility projects throughout North America.
- Research and analysis of local market conditions including action sports assets, hotel inventory, walkability, commercial development, hospitality assets, attractions and other components of a successful sports and visitor destination.
- Analysis of the competitive and comparable facilities and host destinations.
- Completed a total of over 40 surveys with over 80 individuals of local stakeholders, national stakeholders, and action sports event organizers representing more than 200 total events, including:
  - Local Programmatic Opportunities: 29 interviews with local stakeholders and program producers from local government, economic development entities, community organizations, businesses, and sports producers related to the action sports industry in the Central Iowa area.
  - Regional and National Event Organizers: 14 interviews with key stakeholders in the bike and skate industries throughout the country. These organizations represent some of the most notable bike and skate organizations and events in the country and world and could be potential users of an Indoor Action Sports Complex in Central Iowa.

It is worth noting that a community survey was not conducted for the purposes of this study. As planning and preparation for a potential development of this project continue, a survey of area residents could be of great value to inform critical design elements and community needs/preferences. The focus of much of the remainder of this section is on quantified survey data associated with three primary groupings of research completed for this study: 1) interviews with local stakeholders and organizers, and 2) interviews with regional and national BMX organizers, and 3) interviews with regional and national skate sport organizers. These event sectors represent logical, economic impact-generating targets for a potential Indoor Action Sports Complex in Central Iowa, and, as such it will be critical to consider their interest, space requirements, needed surrounding amenities and support, and various destination preferences. Feedback from each of these groups is presented on the following pages.

INTERVIEWED STAKEHOLDERS AND ORGANIZERS

As previously discussed, CSL interviewed over 50 local and regional stakeholders, with a diverse cross-section of 29 organizations. Local stakeholders provided insight into the demand for a potential Indoor Action Sports Complex locally and regionally, as well as the potential support base for a development project of this type. The following is the list of interviewed local and regional stakeholders:

80/35 BMX	Dave Stow	Polk County
Accu-Steel	Des Moines Downtown Chamber	Polk County Conservation
Axios	Des Moines Street Collective	RAGBRAI
BikeIowa	Des Moines Wolfpack	RDG Design
Bike World	Dream Team	Skate DSM
Catch Des Moines	Iowa Bicycle Coalition	South Ridge Mall
CITA - Central Iowa Trail Association	Kittie Weston-Nauer	Team Velarosa
City of Des Moines	Krause+	Valley West Mall
City of Pleasant Hill (Mayor)	Merle Hay Mall	Voss Distribution
City of West Des Moines	MidAmerican Energy Company	

To gauge regional and national market demand for an Indoor Action Sports Complex in the Des Moines metro area, CSL also interviewed eight critical stakeholders and organizers in the bike, skate, and action sports industries. These organizations are listed below.

Blue Springs BMX	Mike's Bike Park	The Boardr
CA Training Facility Skatepark	Red Bull	The Skatepark Project
Camp Woodward	San Diego BMX	USA BMX
Hardesty BMX	Steel Wheels Indoor BMX	USA Skateboarding

5 MARKET DEMAND & OPPORTUNITIES

LOCAL DEMAND

29
Organizations interviewed

350+
potential activations

100%
positive response rate

50-150
number of attendees per event

0
estimated hotel room nights generated

CSL interviewed nearly 50 individuals from 29 organizations who have a vested stake in the community, economy, and action sports industry of Central Iowa. The information below and on the following page represents key insights related to the demand and potential success of an Indoor Action Sports Complex, as indicated by these stakeholder groups.

Top Takeaways

Stakeholders generally expressed significant enthusiasm for developing an Indoor Action Sports Complex in the Central Iowa area, driven by strong community interest and demand. Many stakeholders emphasized the opportunity for the facility to support and be supported by youth organizations by providing a safe, inclusive space for sports and recreation, fostering personal development, and engaging the region's younger population. The Complex would align with efforts to expand the local biking and action sports culture, further positioning Des Moines as a hub for biking and action sports in the Midwest. Stakeholders envision the facility as a multipurpose destination, accommodating a variety of sports and community-focused activities, while partnerships with businesses, local governments, and non-profits were seen as essential to its long-term sustainability. Importantly, the project aligns with broader community goals, including promoting health, wellness, and economic development. However, stakeholders recognized that funding could pose a significant challenge, requiring creative approaches and strong collaboration across public and private sectors to ensure its success.

Key Facility Features

Local and regional stakeholders identified several key features essential for an Indoor Action Sports Complex in the Des Moines metro area. A Multi-Level Skills Course ranked as the top priority, offering progressive challenges for BMX bikers and skateboarders to accommodate all skill levels and foster development. Following this, a Multi-Use Pump Track emerged as a critical feature, providing an engaging training and competition space for BMX riders and some other wheeled sports. A Pro Shop with Support Services was emphasized for offering equipment sales, rentals, and repairs, enhancing user convenience while generating revenue. Viewing and Social Areas were also highlighted for creating a welcoming space for spectators and fostering community engagement. Finally, Event Spaces would enable the facility to host meetings, parties, and other gatherings, boosting its role as a regional attraction and economic driver.

LOCAL DEMAND

Potential Usage

- Weekly BMX / Bike / Skate Clinics
- 3-5 Weekly Open BMX / Skate Practices
- 150+ Self-Produced BMX and Skate Events per Year
- 25+ Private Events / Meetings per Year




The proposed Indoor Action Sports Complex could become a hub for consistent local and regional activity while serving as an occasional venue for larger-scale events. Weekly programming, such as BMX, bike, and skate clinics, as well as regular practice sessions, is anticipated to make up much of the facility's usage. These activities ensure year-round engagement, particularly during colder months when outdoor options are limited. During warmer months, activity may slow slightly, reflecting seasonal shifts, but the facility's diverse offerings will continue to attract a steady stream of users.

In addition to ongoing local programming, a Complex could host over 100 self-produced BMX and skate programs annually, along with various meetings, workshops, and community gatherings. This frequent activation will position the complex as an essential part of the local action sports ecosystem, offering unparalleled opportunities for skill development, training, and recreation.

Local and regional demand is notable and would present a significant majority of utilization at a potential Central Iowa Indoor Action Sports Complex. These events would be expected to attract an estimated 50-150 attendees per event, varying by event type and time of the year. However, these events would result in very few hotel room nights, rather serving as a community benefit than an economic impact driver for the community.

Intensity of Local Market Demand

5 MARKET DEMAND & OPPORTUNITIES

NATIONAL BIKE DEMAND

8
completed interviews

~6
potential third-party events

100%
positive response rate

300-2100
number of attendees per event

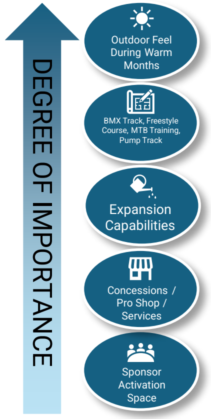
750
estimated hotel room nights generated

CSL interviewed eight organizations and over 15 individuals who represent national stakeholders and organizers in BMX, mountain biking, and other bike-related industries. The information below and on the following page represents key insights related to the national demand and potential success of an Indoor Action Sports Complex indicated by these stakeholder groups.

Top Takeaways

National stakeholders in BMX, mountain biking, and other bike-related industries emphasized the importance of designing an Indoor Action Sports Complex with diverse offerings. It should include both BMX racing and freestyle elements. Such variety would serve a broader participant base and also position the facility as a versatile destination for events and training. The number of national-scale events currently available is limited, but there is a moderate long-term opportunity to create and cultivate new events, helping to grow the industry and establish the facility as a hub for innovation and excellence. Stakeholders highlighted the potential for partnerships with renowned brands in action sports, such as Red Bull, which could bring high-profile events and amplify the facility's visibility. To attract premium event types, the complex must feature best-in-industry amenities and infrastructure that set it apart from existing venues. Additionally, creating a welcoming, community-focused environment was identified as a critical factor for success. A balance of world-class amenities and a sense of inclusivity would ensure the facility appeals to both elite athletes and grassroots participants, solidifying its position as a top-tier action sports facility.

Key Facility Features



DEGREE OF IMPORTANCE

Outdoor Feel During Warm Months

BMX Track, Freestyle Course, MTB Training, Pump Track

Expansion Capabilities

Concessions / Pro Shop / Services

Sponsor Activation Space

National bike organizers and stakeholders identified key features that are critical for the success of an Indoor Action Sports Complex. Foremost is creating an outdoor feel during warm months, with adaptable design elements that support indoor and outdoor use. As riders prefer to be outdoors during warm months, inclusions such as sizable garage doors will improve utilization by creating an 'outdoor' environment. A well-rounded combination of BMX track, freestyle course, pump track and mountain biking training areas was suggested to attract diverse user groups and host competitive events or training sessions. However, facility operating stakeholders suggested limited willingness-to-pay among mountain bike groups, suggesting a lower priority for these types of amenities. Expansion capabilities are also highly valued, ensuring the facility can grow alongside demand and mitigating upfront development costs. Supporting amenities like concessions, pro shops, and sponsorship activation spaces are vital for revenue generation and enhancing the user experience. These features could collectively position the facility to attract national partnerships and host premium events.

5 MARKET DEMAND & OPPORTUNITIES

NATIONAL BIKE DEMAND

Potential Usage

- Monthly Regional BMX Races During BMX Season
- 1-3 'National' BMX Races
- 0-1 BMX Freestyle Event
- 1+ Major Festival
- 5-10 Regional/ National Meetings per Year

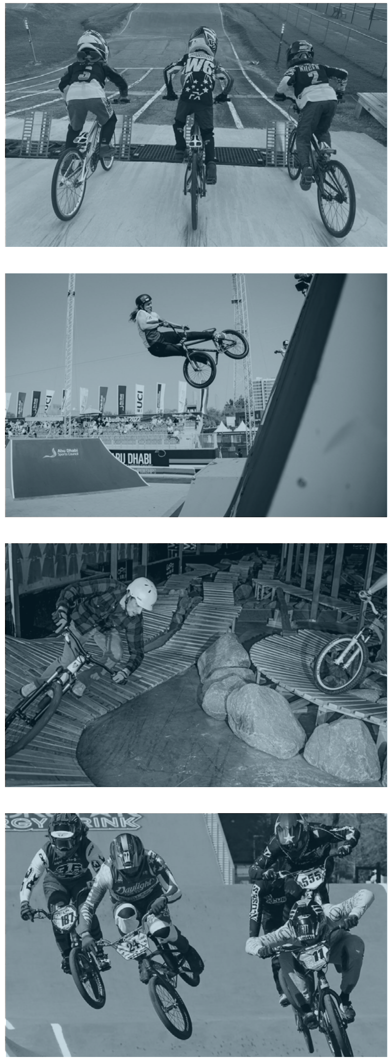
The potential usage of the Indoor Action Sports Complex reflects a mix of local, regional, and national demand. As previously noted, local and regional activities will form the foundation of consistent usage, including regular BMX practice sessions, monthly regional races, and community-driven events; meanwhile, the facility's appeal to national stakeholders will hinge on its ability to differentiate itself within the competitive landscape.

National BMX races, for instance, are likely to be limited to one annual event unless the facility offers highly competitive and differentiated amenities that draw significant attention. Similarly, securing BMX freestyle events will require a collaborative approach with industry stakeholders, focusing on creating in-house events or developing strong relationships with existing organizers. These efforts will take time but could position the facility as a credible host for such high-profile competitions. USA BMX bids out these events through an RFP process in which an RFP is sent to USA BMX affiliated facilities to apply to host these events at their venue on an annual basis. USA BMX advised against making the Complex an Olympic training facility, noting that this will reduce the likelihood that the organization will consider hosting an event at the Complex.

Major festivals, such as RAGBRAI, represent a unique opportunity to integrate into broader event ecosystems. These engagements would likely see the Complex as a co-host of activity alongside multiple venues, with concerts, food festivals, or other event types enhancing the community's exposure. Finally, the facility could host or help attract various meetings among bike, BMX, skate and recreation-related groups from around the country. These activities, while more sporadic, could significantly bolster the Complex's identity and economic impact, complementing its foundational local and regional programming.

The national demand for a facility of this type is somewhat limited, as there is not a significant number of existing events; however, with proper management of the facility and a highly differentiated and best-in-class facility product, the creation of new events that grow significantly in the long-term is possible. National events would be expected to attract a 300 to 2,100 attendees per event.

Intensity of National Bike / BMX Demand



OTHER CYCLE SPORT USERS

In addition to BMX events, it is anticipated that the Indoor Action Sports Complex will host an array of other types of bicyclists who could use the pump track and meeting spaces at the facility. There are over 40 unique categories of biking-related activities that exist today. From these 40 categories, CSL identified 18 types most applicable to a potential Complex. These include highly popular activities such as road cycling, gravel biking, and mountain biking, which attract broad participation, alongside niche options like cyclocross, pump track biking, and snow biking, which appeal to smaller but dedicated audiences.

Road Biking
1. Road cycling: Riding on paved roads for recreation, fitness, or competition.
2. Endurance cycling: Long-distance road cycling focused on stamina.
3. Time trial racing: Solo races against the clock on flat or rolling terrain.
4. Gravel biking: Riding on unpaved gravel roads for sport or exploration.

Mountain Biking (MTB)
5. Cross-country (XC): Trail riding with climbs and descents, often competitive.
6. Trail biking: Recreational mountain biking on various types of trails.
7. Fat biking: Biking on snow or soft terrain with oversized tires.

Competitive and High-Performance Biking
8. Triathlon cycling: Cycling leg of triathlon events, focused on speed and endurance.

Urban and Commuting Biking
9. Commuting: Using bikes for transportation in urban or suburban areas.
10. Electric biking (e-biking): Pedal-assist bikes for commuting or leisure.

Recreational and Touring
11. Bike touring: Multi-day cycling trips with gear for self-sufficiency.
12. Bikepacking: Off-road adventure biking combining cycling and camping.
13. Recreational cruising: Casual rides for fun or fitness on flat paths.

Specialized Biking
12. BMX racing: Short, fast races on dirt tracks with jumps and berms.
13. BMX freestyle: Performing tricks and stunts in parks or urban spaces.
14. Pump track biking: Riding loops using pumping motions for momentum.
15. Cyclocross: Mixed-terrain racing with obstacles requiring dismounts.
16. Dirt jumping: Aerial tricks performed on specially designed dirt jumps.

Adventure and Offbeat
17. Snow biking: Riding fat bikes on snow-covered trails or courses.
18. Gravel adventure biking: Endurance rides or races on unpaved backroads.

5 MARKET DEMAND & OPPORTUNITIES

NATIONAL SKATE DEMAND

6
completed interviews

~3
potential third-party events

100%
positive response rate

350-1,100
number of attendees per event

600
estimated hotel room nights generated

CSL interviewed six organizations and over 10 individuals who represent national and international stakeholders and organizers in the skateboarding industry. The information below and on the following page represents key insights related to the national demand and potential success of an Indoor Action Sports Complex indicated by these stakeholder groups.

Top Takeaways

The national skateboarding landscape offers unique opportunities and challenges for an Indoor Action Sports Complex. The presence of Lauridsen Skatepark has already positioned the city as a hub for skateboarding, giving Des Moines a strong skate identity that could be further leveraged. However, the skateboarding industry's lack of a centralized organizing body complicates efforts to secure frequent, structured programs or large-scale national events. Notable skateboarding events, when they do occur, often require significant financial subsidies from cities, which presents a barrier for hosting them regularly without strong public or private partnerships. Skate officials suggested that establishing a high-end, one-of-a-kind indoor skateboarding facility in Des Moines would likely generate a unanimous reputation as the skate capital of the Midwest. The economic benefits of such a facility may primarily come from earned marketing—boosting the city's profile through widespread media exposure—rather than traditional room night revenue from visitors. For organizers, appeal lies in creating a facility that pushes the boundaries of innovation in the sport.

Key Facility Features

An Indoor Action Sports Complex in Des Moines must prioritize key features to attract skaters and industry events. A street course is essential for its popularity and versatility, alongside bowls and vert ramps to accommodate advanced skaters and competitive events. Concessions, pro shops, and services add revenue potential and enhance the user experience, while adaptive and accessible design ensures inclusivity for diverse groups.

Indoor and outdoor offerings would maximize year-round use, and multi-purpose event spaces could host events and meetings, broadening the facility's appeal and revenue opportunities. These features would position the Complex as a premier indoor skateboarding destination and would likely make it a leader among other facilities throughout the world.

5 MARKET DEMAND & OPPORTUNITIES

NATIONAL SKATE DEMAND

Potential Usage

- Daily For Open Skate During Winter
- 1-3 National Events Per Year
- 20-50 Skate Influencer Visits / Promotional Skates
- Professional Training Opportunities
- 2-4 Non-Skate Concerts, Community Gatherings, Etc.

The potential usage of an Indoor Action Sports Complex in Central Iowa reflects a blend of daily activity and high-profile events. Daily open skate sessions would cater primarily to local riders but could draw national and international visitors if the facility establishes itself as a world-class destination. By offering premium amenities and a unique experience, the Complex could become a must-visit for traveling enthusiasts, boosting both local engagement and tourism.

The Complex's capability to host 1-3 national/international skateboarding events annually could position it as a prominent player in the global skateboarding scene. While the number of existing national events is limited, creating in-house competitions with industry partnerships could establish Central Iowa as a hub for marquee skateboarding events. These efforts would enhance the Facility's identity and help generate significant economic and social impacts over time. These events are generally announced through an RFP process; facility management should leverage industry relationships and monitor announcements from major companies to ensure it proposes for any applicable skate event. Alternatively, these events could be self-produced through leveraging industry ties.

Frequent appearances by skate influencers and professionals for promotional sessions could solidify the venue's reputation and foster a sense of excitement within the skateboarding community. Additionally, with the right staff and resources, the Complex could play a pivotal role in developing an Olympic and professional athlete pipeline, providing a training ground for top-tier competitors while inspiring the next generation of skaters. However, making the facility an official Olympic training complex like the California Training Facility will preclude it from significant public use, which will limit the Complex's utilization and economic impact.

While all interviewed organizers were highly interested in utilizing an Indoor Action Sports Complex in Central Iowa, they noted the highly limited nature of national and international scale skateboarding events. These events are likely to generate between 350 to 1,100 participants each. While attracting and hosting these events would be critical to the identity and long-term success of a potential Complex, they are unlikely to result in significant economic impact for the community.

National and International Skate Market Demand

1 — 4 — 10

5 MARKET DEMAND & OPPORTUNITIES

SUMMARY OF MARKET DEMAND

LOCAL DEMAND

- **Strong Community Interest:** Enthusiasm expressed by over 50 stakeholders interviewed, representing a notable base for grassroots programming and activities.
- **Multi-purpose Opportunity:** The Complex could be positioned as a hub for various action sports and community events, increasing activation and potential community members served.
- **Consistent Usage:** Regular programming, including weekly clinics, BMX practices, and other event types could account for 350+ self-produced activities annually.

REGIONAL/NATIONAL BIKE MARKET

- **Demand for Premium Features:** Stakeholders prioritize a BMX track, freestyle elements, and outdoor integration for warmer months; high-tier features promote opportunity for national recognition.
- **Potential to Host Events:** National-scale events are limited (1-3 annually), targeted partnerships and best-in-class amenities could position the facility for premium events such as Red Bull activations.
- **Economic Impact:** Events could generate 300-2,100 attendees per event, with greater opportunities for earned marketing and brand positioning than traditional room-night revenue.
- **Demand Statement:** Organizers in this space greatly desire a premium facility; however, the lack of existing events and a somewhat niche participation base defines demand as somewhat limited.

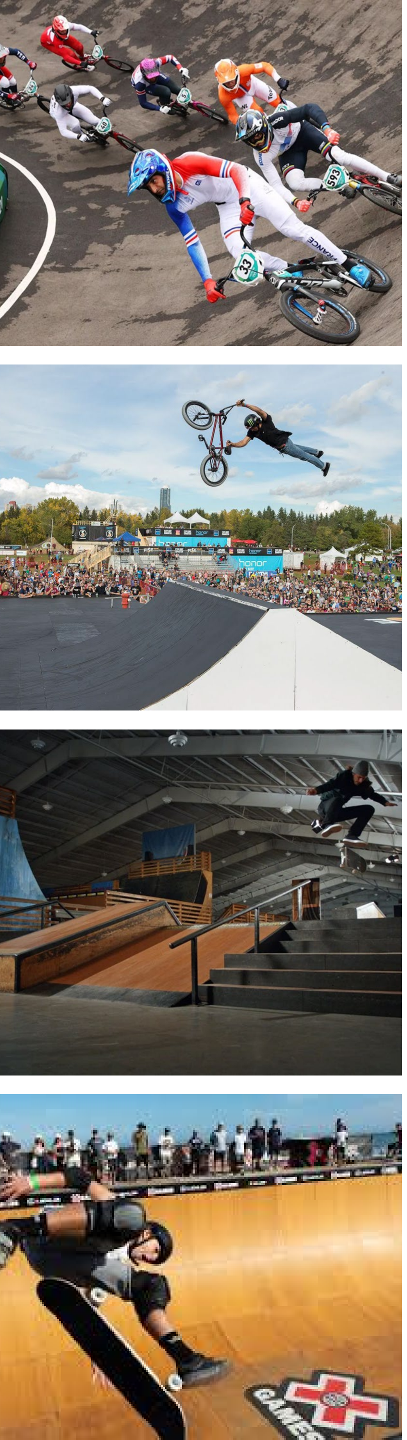
REGIONAL/NATIONAL SKATE MARKET

- **Leverage Existing Assets:** The presence of Lauridsen Skatepark provides a strong foundation for skate identity and complements indoor opportunities.
- **Unique Industry Needs:** Stakeholders highlight the lack of a centralized organizing body in skateboarding, requiring highly collaborative efforts to host 1-3 national events annually.
- **Focus on Inclusivity and Design:** Adaptive features, high-end amenities, and multi-use spaces are critical for drawing diverse users and high-profile events.
- **Demand Statement:** High interest from participants and organizers; however, a highly limited number of existing events and requirements of organizers present demand as limited.

OTHER KEY CONSIDERATIONS

- **Funding Challenges:** All stakeholders emphasized the need for creative funding partnerships and subsidies to ensure financial feasibility, as ROI associated with these facilities is often highly limited.
- **Limited National Event Calendar:** Developing in-house events and fostering long-term partnerships with local stakeholders, governing bodies and brands is essential to build demand and sustainability.
- **Reputation Building:** Establishing Des Moines as a premier action sports destination relies on delivering a world-class facility and fostering community-driven programming.

An Indoor Action Sports Complex in Central Iowa could become a Midwest and national hub for action sports, balancing consistent local activation with targeted national events. While notable demand exists among industry stakeholders, focusing on inclusivity, premium amenities, and strategic partnerships can help the facility achieve community and economic impact; however, caution is advised due to a limited national event industry and very little financial return associated with action sports facilities.



BUILDING PROGRAM & RECOMMENDATIONS

KEY TAKEAWAYS

As noted throughout this Report, there are many factors to consider as part of designing the building program for a potential future Indoor Action Sports Complex in Central Iowa. These key positive factors and challenges are listed in the graphic below, and each have been carefully considered as part of the development of the program presented later herein.

Momentum / Building Blocks

- Material Demand Identified
- Excitement for a First of its Kind Destination
- Aligns with Des Moines Quality of Life Goals
- Robust Local Support from Endemic Groups
- Growing Spending on Sports Tourism and Recreation Nationally
- Moderate Support from Non-Endemic Groups

Key Barriers / Challenges

- Limited Room Night Generator Relative to Other Destination Assets
- Requires Build-Up of Local Scene
- Likely To Run At Operational Loss
- Unpredictable Skate Demand
- Escalating Construction Costs Nationally (to be discussed later herein)

?

Key Questions

- Can We Be Something For Everyone?
- What If We Don't Have a Racetrack?
- Do We Want to Be Public or Private?

6 BUILDING PROGRAM & RECOMMENDATIONS

PROPOSED DESTINATION SCENARIOS

As noted, many local stakeholders and national BMX and skateboard organizers expressed enthusiasm for a potential, first-of-its-kind Action Sports destination that would combine elements of function and leisure. The questions on the previous page led to three strategic considerations that would have significant impact on the overall design, purpose and financial viability of the proposed Complex. The pros and cons of three scenarios, based on these questions, are explored below, followed by a recommended building program on the following page.

Can We Be Something For Everyone?

A **multipurpose event destination** featuring a BMX racetrack, freestyle course, restaurant/cafe, pro/repair shops, meeting spaces, and onsite family entertainment.

+
- Maximum usage
- Diverse revenue

-
- High construction costs
- Increased financial risk

What If We Don't Have a Racetrack?

A **freestyle and skills course** that also drives revenue from onsite hospitality and entertainment but does not feature a USA BMX-grade racetrack.

+
- Maximize revenue
- Diverse attendee base

-
- No national races
- Limited use for BMX riders

Should It Be Privately Owned?

A **profit-focused, privately owned** action sports facility that generates revenue from destination amenities, events and premium priced memberships and admissions.

+
- Private developer could pay for project

-
- Limits inclusivity
- May have short lifespan if not financially viable

RECOMMENDED BUILDING PROGRAM

Considering the challenges associated with the three commercially-driven scenarios shown on the previous page, yet material demand identified among potential users at the local and national level, CSL recommends the development of a world-class, event-focused facility with limited onsite hospitality amenities.

To provide the important hospitality element advocated for by action sports stakeholders, a potential Complex should be a part of a vibrant district that features restaurants, entertainment, shopping and meeting spaces, relieving Complex ownership of the costs and risks associated with building and owning these types of assets. Further discussion of this type of location is provided within the following Site Analysis Chapter.

However, if a private entity is interested in owning and operating entertainment, dining, or retail assets within the Complex, discussions regarding a collaborative development approach should be explored. Further details on this topic are provided later in this document.

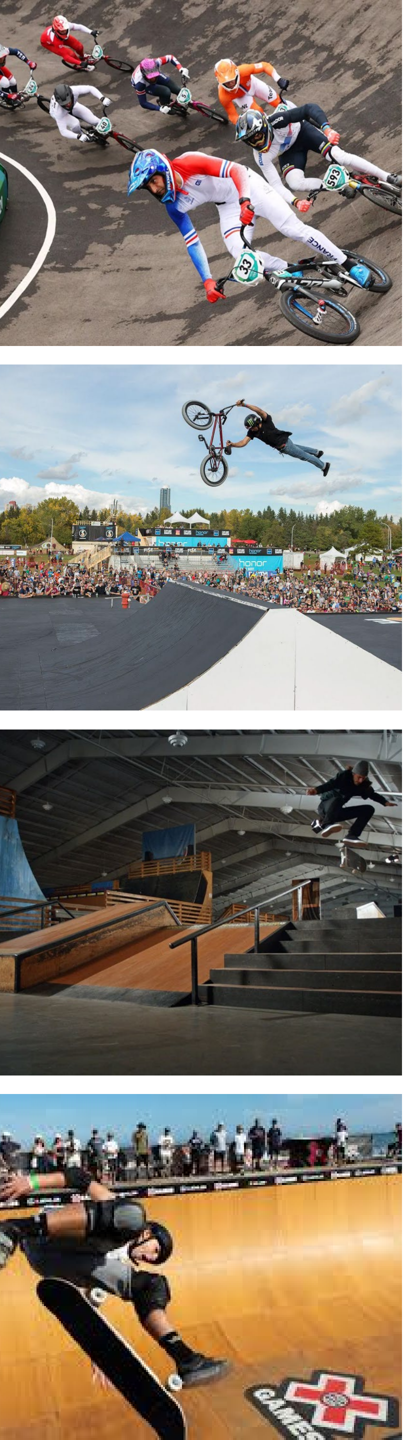
A space-by-space summary of CSL's recommended building program is summarized in the adjacent graphic. This program is designed to accommodate national BMX races, nationally touring BMX and skateboard skills competitions, and a wide variety of local uses. A breakdown of the anticipated usage of this facility, as well as alternate scenarios, is presented later herein.

	Overall Building Square Footage	Notes
Gross Footprint	140,000	All-in-one skateboard and BMX destination.
Ceiling Height	25 ft.	Minimum of 20 ft., though 25 ft. recommended to allow for maximum BMX and skateboard ramp jumps.
Building Support	30' x 30' beams	Free-span preferred by USA BMX, but columns recommended to save costs for construction.

	BMX Facilities Square Footage	Notes
BMX Track	60,000	1,000+ ft. racing track with USA BMX-certified starting gate and track design.
Pump Track	10,000	Pump track for a diverse mix of bicyclists and skaters; should have the ability to be closed off from the race track.
Prep / Waiting Area	10,000	Open space to allow for rider waiting lines; can also serve as open gathering space.
Spectator Seating	15,000	Portable, multilevel bleacher seating to support up to 1,500 spectators.
Bike / Equipment Rental / Trade Post	2,000	Bike rental area with fleet of 50+ bikes, along with public trading post featuring bike racks; could be operated by Des Moines Street Collective.

	Skate Facilities Square Footage	Notes
Skatepark	15,000	Mix of park and street obstacles, with a focus on including features that are not available at Lauridsen Skatepark.
Spectator Seating	5,000	Portable, multilevel bleacher seating to support up to 500 spectators.
Open / Multipurpose Space	7,500	Additional space to support temporary vert ramps as well as pop-up courses, experiences, and gatherings.

	Other Amenities Square Footage	Notes
Concessions	1,500	Concession stand with in-house kitchen and multiple points of sale.
Storage	3,500	Onsite storage for various equipment; oversized to accommodate temporary equipment or expansions in inventory.
Pro Shop	2,500	Onsite skate and BMX pro shop operated by a local private partner.
Offices / Other	8,000	Back-of-house offices and multipurpose rooms for parties and meetings.



SITE ANALYSIS

CSL

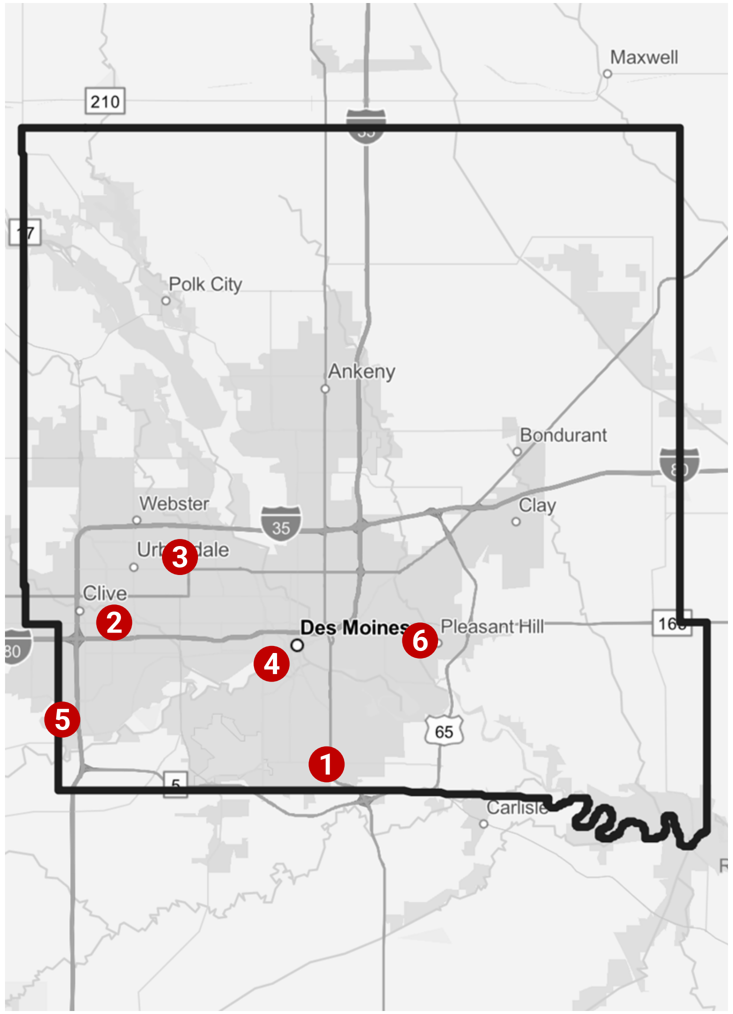
PRELIMINARY SITES

As important as size and configuration, the location and site of an Indoor Action Sports Complex can have a significant impact on the facility's operational success and its ability to serve the community and generate activity and associated economic impact. As part of the overall evaluation of an Indoor Action Sports Complex in the Central Iowa area, an assessment of potential sites/locations was conducted to determine which general areas might be best suited as host sites/locations. In general, a large number of characteristics and factors are important when evaluating the attractiveness of project locations. These include:

- Site Suitability:
    - Acreage for Optimized Program Configuration
    - Acreage for Future Expansion
    - Acreage for Additional Onsite Complementary Development
    - Resources and Efforts to Acquire
    - Attractiveness of the Site to Event Planners & Attendees
    - Magnitude of Necessary Infrastructure Improvements
    - Local Accessibility
    - Accessibility to Underserved Groups
    - Visibility
- Other Visitor Amenity Availability:
    - Proximity to Hotels
    - Proximity to Restaurants/Bars
    - Proximity to Shopping/Retail
    - Proximity to Entertainment/Attractions

Working with local stakeholders, six potential sites were identified as possible locations for a potential Indoor Action Sports Complex in Central Iowa. The strengths and challenges associated with each site are summarized later herein.

1. **Southridge Mall (1.1 Northwest Lot & 1.2 Old Younkers):** Shopping mall in southern Des Moines with an empty Younkers site for potential redevelopment and expansion and an undeveloped lot for potential development, both with existing parking.
2. **Valley West Mall (2.1 North Anchor & 2.2 South Anchor):** Shopping mall in West Des Moines with two empty anchor tenants for potential redevelopment and existing parking lots for potential development.
3. **Merle Hay Mall:** Shopping mall in northwestern Des Moines with an undeveloped lot as a potential site.
4. **Dico Superfund Site:** A downtown site currently undergoing master planning efforts by Krause Development in relation to a planned USL soccer stadium.
5. **Grand Avenue (MidAmerican RecPlex):** An undeveloped field adjacent to the MidAmerican RecPlex and privately owned.
6. **Four Mile Creek (Polk County Conservation):** Owned by Polk County Conservation, who is interested in a co-development effort.



DES MOINES PUBLIC TRANSIT MAP

This public transit map of the Des Moines metro area was utilized to evaluate the accessibility of the proposed Indoor Action Sports Complex locations for the local community, with a particular focus on underserved groups. By analyzing the DART network and other transit options, CSL assessed the proximity and convenience of public transportation to each potential site. This helped determine which locations offer the most equitable access, ensuring that community members reliant on public transit can easily reach the facility. Additionally, the map's insights into walkability, bikeability, and transit connectivity informed our analysis of how effectively each site integrates with the region's broader transportation infrastructure.

Legend

Park and Rides

DART Network

- 1 - Fairgrounds
- 10 - East University
- 11 - Ingersoll / Valley Junction
- 13 - SE Park Ave
- 14 - Beaver Ave
- 15 - 6th Ave
- 16 - Douglas Ave
- 16 - Select Trips Only
- 17 - Hubbel Ave / Altoona
- 17 - Select Trips Only
- 2 - Maury St
- 3 - University
- 4 - SE 14th St
- 4 - Select Trips Only
- 5 - Franklin Ave / Johnston
- 50 - Euclid / Douglas Crosstown
- 52 - Jordan Creek
- 52 - Select Trips Only
- 52 - Closed Door Service
- 6 - Indianola Ave
- 60 - University / Ingersoll
- 7 - SW 9th St
- 7 - Select Trips Only
- 72 - West Des Moines Valley
- 74 - NW Urbandale
- 8 - Fleur Dr
- LINK
- D-LINE
- 99 - Altoona Express
- 98 - Ankeny Express
- 96 - EP True Express
- 95 - Vista Express
- 94 - Westown Express
- 93 - NW 86th Express
- 92 - Hickman Express
- Express Closed Door Service

DART On Demand Ankeny

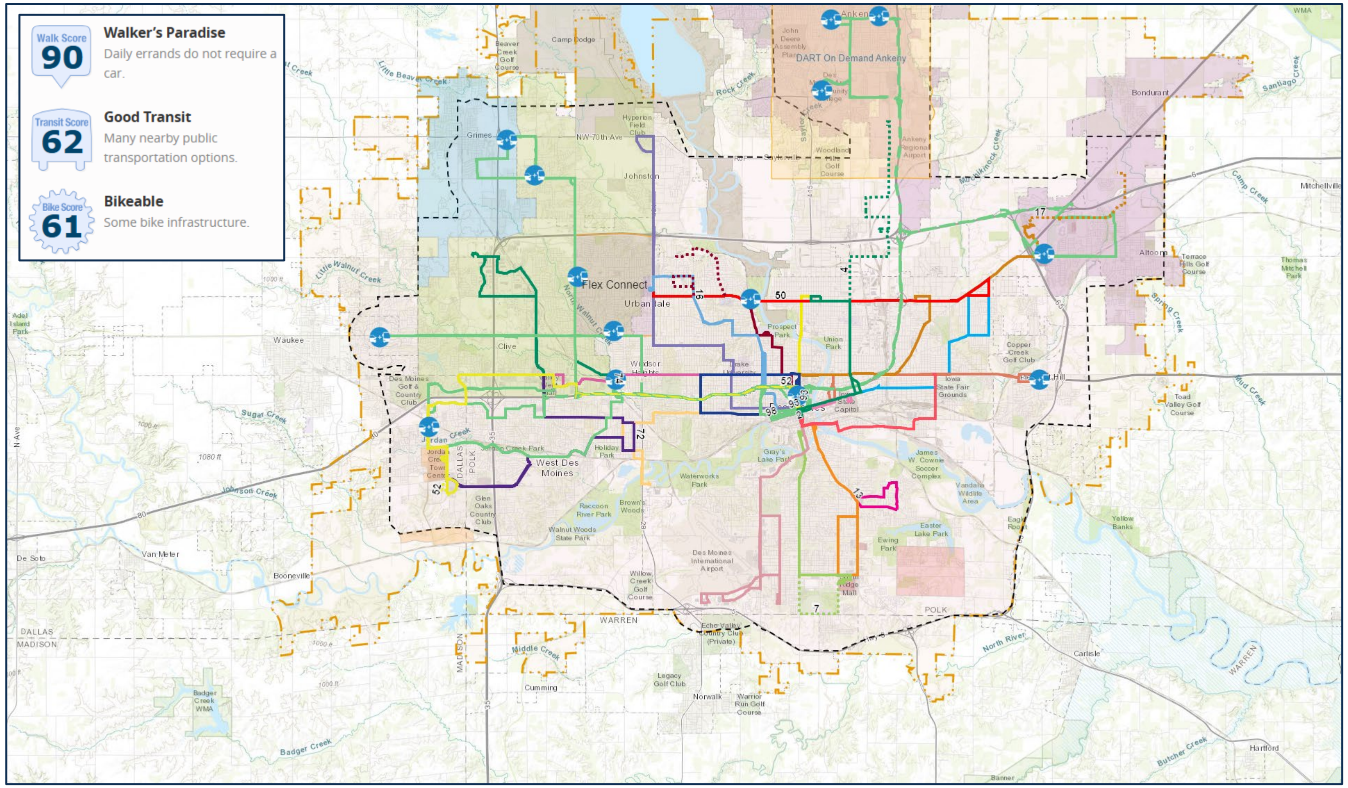
Flex Connect

On Call Zones

- Easter Lake On Call
- Grimes On Call (Grimes Proper)
- Grimes On Call (Additional Service Area)
- Northeast Suburban On Call
- Jordan Creek On Call

DART Bus Plus

DART Bus Plus Premium

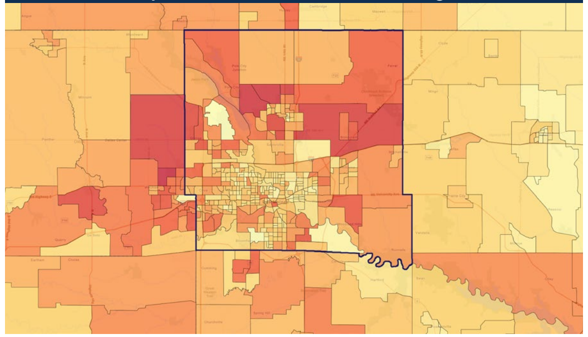


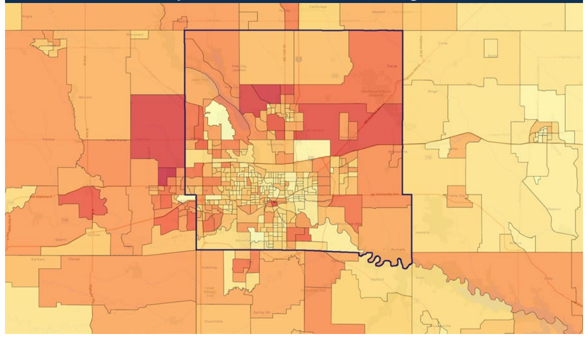
Source: Des Moines Area Regional Transit Authority, Walk Score, 2024.

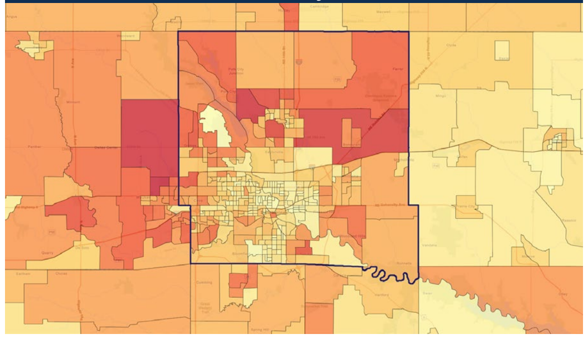
7 SITE ANALYSIS

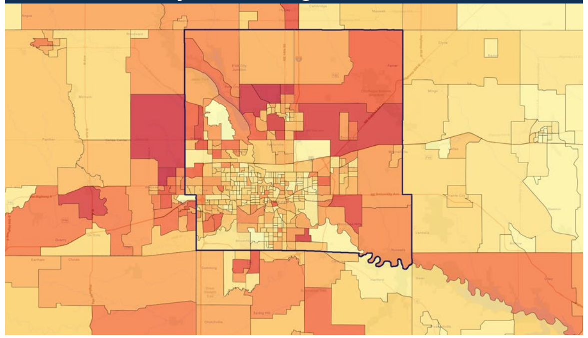
DEMOGRAPHIC AND BEHAVIORAL HEAT MAPS

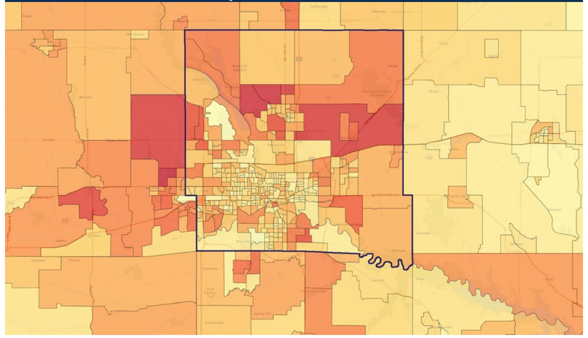
The heat maps below provided key insights into the demographic and behavioral patterns across the Central Iowa area, playing a critical role in site selection considerations for the Indoor Action Sports Complex. Maps illustrating participation in mountain biking, road biking, and viewership of bicycle racing on TV or the internet highlighted areas with high engagement in biking culture. Additionally, maps depicting population density, median age, and the number of bicycles provided essential context about the community composition and its potential to support the Complex. These visualizations enabled CSL to identify areas with both the greatest demand for and accessibility to action sports amenities, ensuring the selected site aligns with the region's active demographics and interests.

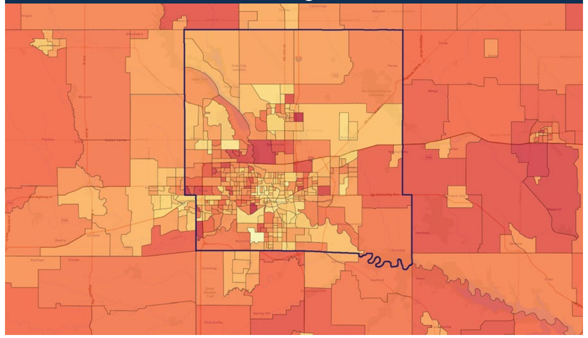

Participated in Mountain Biking 2024


Participated in Road Biking 2024


Number of Bicycles 2024


Watched Bicycle Racing on TV/Internet 2024


Population 2024


Median Age 2024

Source: Esri, 2024.

HOTEL INVENTORY

The following hotel analysis reveals critical insights into the distribution and characteristics of lodging accommodations throughout Polk County, which directly inform the site selection for the proposed Indoor Action Sports Complex. Across the County, there are 63 lodging properties that have over 100 rooms, providing a total of 9,109 rooms. Downtown Des Moines boasts the highest concentration of properties, with 26 hotels offering 4,275 rooms, representing 47 percent of the total inventory. Other key clusters are found in the southwestern corner of the County, such as West Des Moines, with 16 properties and 2,236 rooms, offering a range of amenities conducive to hosting event attendees. Similarly, northwestern Des Moines and the Clay area demonstrate moderate room availability but with fewer high-tier options compared with the downtown core.

	Lodging Property	City	Hotel Rooms (number)	Chain Scale
1	Adventureland Resort	Altoona	175	Indep
2	Prairie Meadows Hotel Racetrack & Casino	Altoona	168	Indep
3	Hyatt Place Altoona/Des Moines	Altoona	112	Upscale
4	Fairfield Inn & Suites Des Moines Altoona	Altoona	107	Upper Mid
5	Courtyard Des Moines Ankeny	Ankeny	119	Upscale
6	Wyndham Garden Ankeny	Ankeny	113	Upper Mid
7	WoodSpring Suites Ankeny Des Moines	Ankeny	105	Economy
8	Staybridge Suites Des Moines North - Ankeny	Ankeny	100	Upscale
9	Days Inn by Wyndham West Des Moines / Clive	Clive	130	Economy
10	Courtyard Des Moines West Clive	Clive	108	Upscale
11	Country Inn & Suites Des Moines West	Clive	104	Upper Mid
12	Wildwood Lodge	Clive	103	Indep
13	Marriott Des Moines Downtown	Des Moines	413	Upper Upsc
14	Hilton Des Moines Downtown	Des Moines	330	Upper Upsc
15	Hotel Fort Des Moines, Curio Collection by Hilton	Des Moines	287	Upper Upsc
16	Holiday Inn Des Moines DTWN - Mercy Area	Des Moines	251	Upper Mid
17	Embassy Suites by Hilton Des Moines Downtown	Des Moines	234	Upper Upsc
18	Holiday Inn Des Moines Airport Conference Center	Des Moines	213	Upper Mid
19	Renaissance Des Moines Savery Hotel	Des Moines	209	Upper Upsc
20	Ramada Des Moines Tropics Resort & Conference Center	Des Moines	166	Midscale
21	Comfort Inn & Suites Event Center Des Moines	Des Moines	155	Upper Mid
22	Sonesta Essential Des Moines	Des Moines	139	Upper Mid
23	Clarion Des Moines	Des Moines	139	Upper Mid
24	Surety Hotel	Des Moines	137	Indep
25	Days Inn & Suites Des Moines Airport	Des Moines	133	Economy
26	Hampton by Hilton Inn & Suites Des Moines Downtown	Des Moines	131	Upper Mid
27	Residence Inn Des Moines Downtown	Des Moines	127	Upscale
28	Home2 Suites by Hilton Des Moines at Drake University	Des Moines	124	Upper Mid
29	Hampton Inn Des Moines-Airport	Des Moines	120	Upper Mid
30	Motel 6 Des Moines North	Des Moines	120	Economy
31	Staybridge Suites Des Moines Downtown	Des Moines	111	Upscale
32	Quality Inn & Suites Des Moines	Des Moines	111	Midscale
33	AC Hotel Des Moines East Village	Des Moines	109	Upscale
34	Homewood Suites by Hilton Des Moines Airport	Des Moines	105	Upscale
35	Holiday Inn Express Des Moines	Des Moines	105	Upper Mid
36	Budget Inn & Suites	Des Moines	104	Indep
37	Holiday Inn Express & Suites Des Moines Downtown	Des Moines	102	Upper Mid
38	Hilton Garden Inn Des Moines Airport	Des Moines	100	Upscale
39	Stoney Creek Des Moines	Johnston	164	Upscale
40	Hilton Garden Inn Des Moines Urbandale	Johnston	148	Upscale
41	TownePlace Suites Des Moines Urbandale	Johnston	116	Upper Mid
42	Homewood Suites by Hilton Urbandale Des Moines	Johnston	107	Upscale
43	WoodSpring Suites Des Moines Pleasant Hill	Pleasant Hill	105	Economy
44	Holiday Inn & Suites Des Moines Northwest	Urbandale	198	Upper Mid
45	Revel Hotel Des Moines Urbandale	Urbandale	110	Upper Upsc
46	Extended Stay America Des Moines Urbandale	Urbandale	104	Midscale
47	Hotel Renovo Des Moines Urbandale	Urbandale	102	Upper Upsc
48	Sheraton Hotel West Des Moines	West Des Moines	285	Upper Upsc
49	West Des Moines Marriott	West Des Moines	219	Upper Upsc
50	Drury Inn & Suites West Des Moines	West Des Moines	180	Upscale
51	Hilton Garden Inn West Des Moines	West Des Moines	176	Upscale
52	The Rewind West Des Moines	West Des Moines	137	Upper Upsc
53	Hampton by Hilton Inn West Des Moines Lake Drive	West Des Moines	135	Upper Mid
54	Hyatt Place West Des Moines/Jordan Creek	West Des Moines	123	Upscale
55	WoodSpring Suites West Des Moines	West Des Moines	122	Economy
56	Residence Inn Des Moines West at Jordan Creek Town Center	West Des Moines	122	Upscale
57	Motel 6 Des Moines West	West Des Moines	121	Economy
58	element West Des Moines	West Des Moines	110	Upscale
59	Fairfield Inn & Suites Des Moines West	West Des Moines	102	Upper Mid
60	Courtyard Des Moines West Jordan Creek	West Des Moines	102	Upscale
61	Hampton by Hilton Inn & Suites West Des Moines	West Des Moines	102	Upper Mid
62	Westown Parkway Residences	West Des Moines	100	Indep
63	Homewood Suites by Hilton West Des Moines	West Des Moines	100	Upscale
	TOTAL		9,109	

City	Hotel Count	Room Count	Room Count Share
Altoona	4	562	6%
Ankeny	4	437	5%
Clive	4	445	5%
Des Moines	26	4,275	47%
Johnston	4	535	6%
Pleasant Hill	1	105	1%
Urbandale	4	514	6%
West Des Moines	16	2,236	25%

Chain Scale	Count	Share
Luxury	0	0%
Upper Upsc	10	16%
Upscale	19	30%
Upper Mid	18	29%
Midscale	3	5%
Economy	7	11%
Indep	6	10%

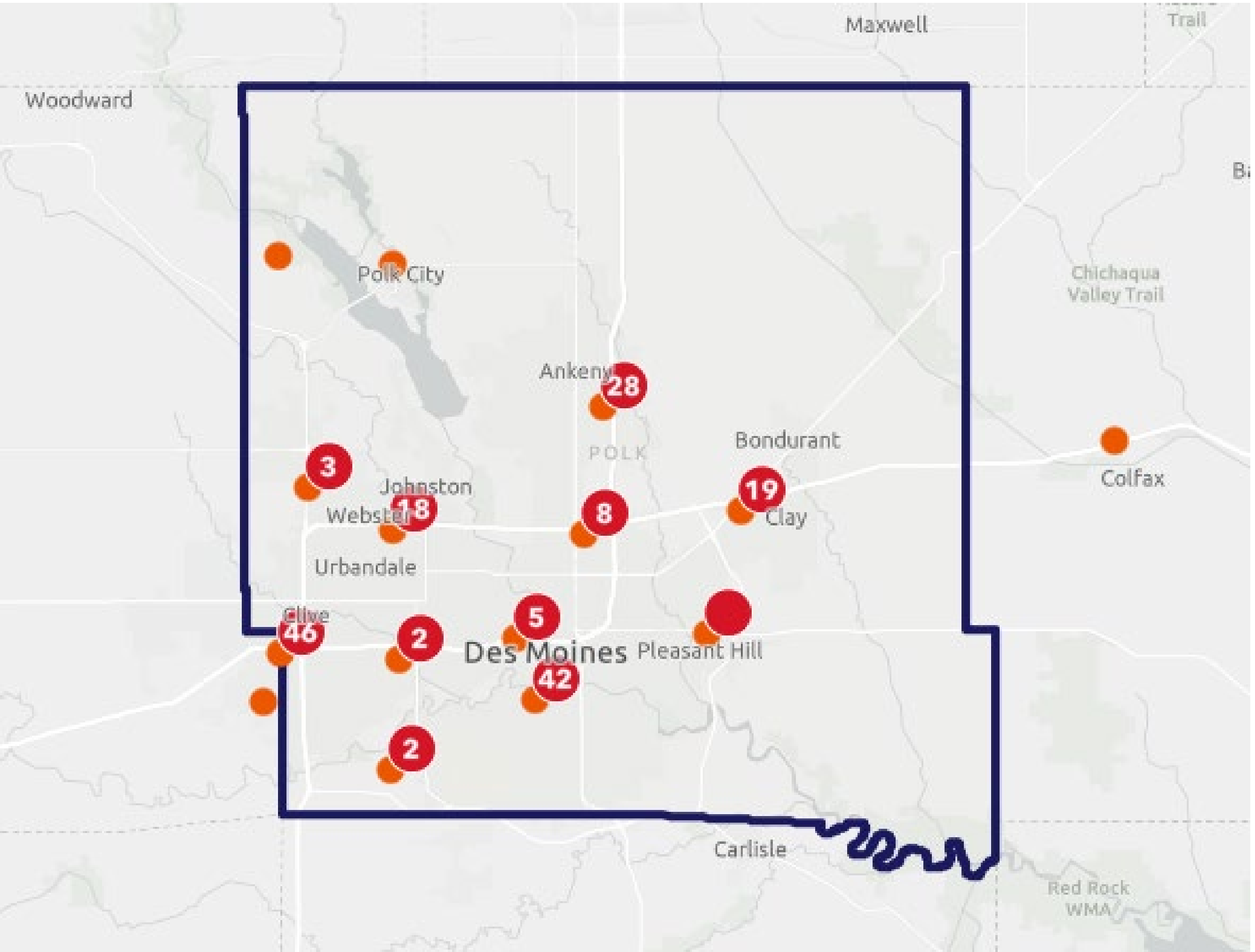
Source: STR, Catch Des Moines, 2024.

HOTEL INVENTORY (continued)

The chain scale breakdown further highlights the County's diverse accommodation inventory. The largest shares of hotel inventory fall within the upscale (30 percent) and upper midscale (29 percent) categories, which collectively account for more than half of all lodging properties. Upper upscale properties, though limited to 16 percent of the inventory, provide key venues for hosting attendees requiring premium accommodations, while midscale and economy properties ensure options for budget-conscious travelers. Independent hotels make up 10 percent of the inventory, adding a unique, localized option for visitors.

As the analysis moves eastward toward the Pleasant Hill area, the availability of hotel inventory sharply decreases, with only one property in the immediate vicinity. This trend indicates potential challenges for accommodating large numbers of event attendees without significant new development or partnerships with lodging providers. Conversely, the concentration of hotels in downtown Des Moines and West Des Moines presents an opportunity to capitalize on existing lodging infrastructure, ensuring ease of access and convenience for participants and spectators. The southwestern and northwestern clusters' proximity to major highways and retail hubs also enhances their viability as site locations for the Complex.

Overall, this analysis underscores the importance of selecting a site with sufficient lodging options nearby to meet the diverse needs of the Complex's target audience while considering gaps in hotel coverage that could impact attendee experience and event success.



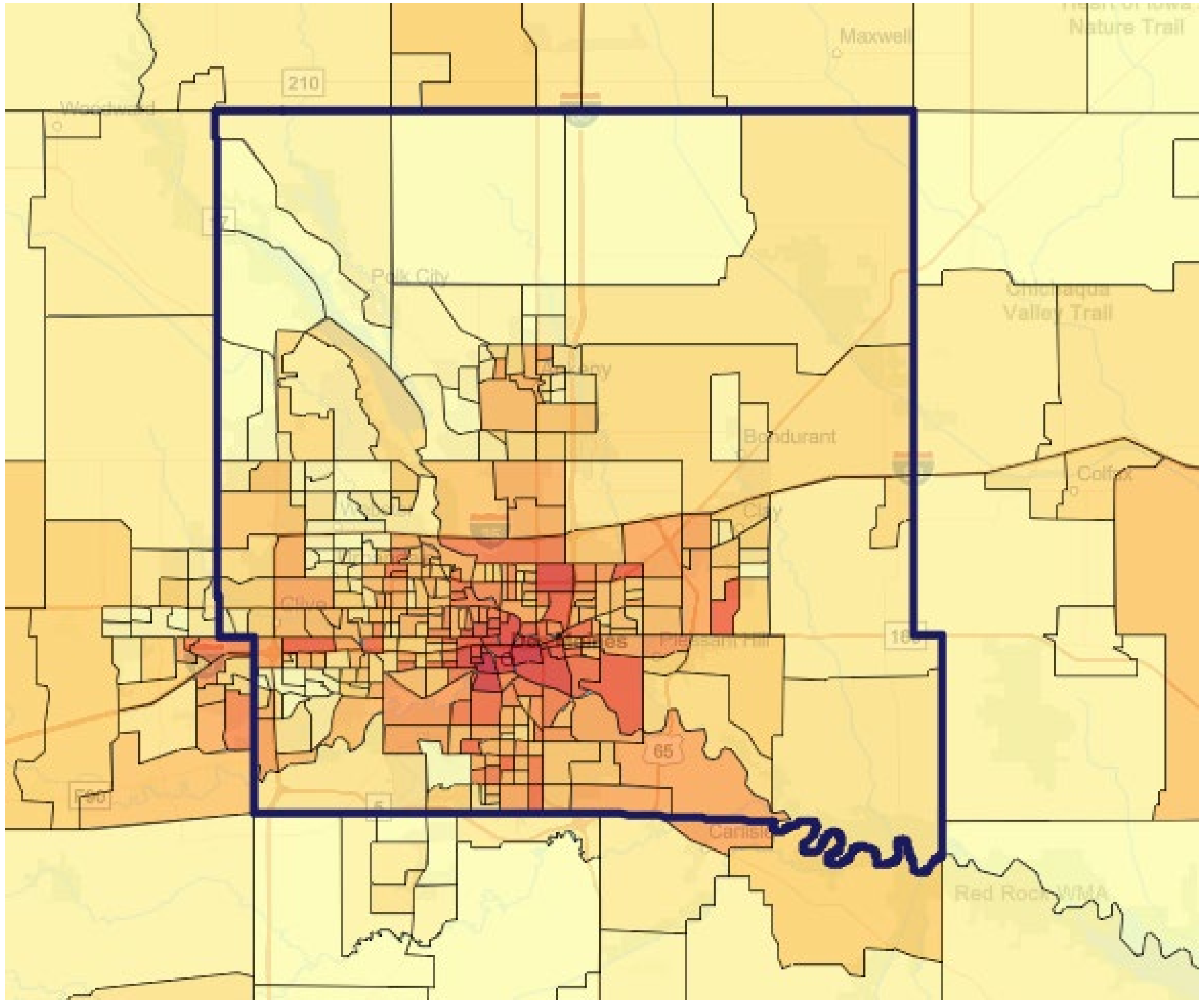
Source: Esri, 2024.

2024 TOTAL CRIME INDEX

The following Crime Index Heat Map was utilized to identify at-risk areas and underserved communities within the Des Moines metro area, providing valuable insight for site selection and planning. The highest concentration of increased crime index values is observed in downtown Des Moines, followed by downtown West Des Moines. These areas exhibit a marked decrease in crime levels as the analysis extends outward toward suburban and rural areas.

This spatial analysis allowed for a comprehensive evaluation of potential site locations, considering safety concerns for facility users and attendees. Sites in higher-crime areas, such as the urban downtown cores, pose challenges for perception and accessibility but may also offer opportunities to serve underserved populations by providing structured and positive community engagement spaces. Conversely, sites in lower-crime areas on the periphery, while potentially safer and more appealing to certain demographics, may require greater efforts to ensure inclusivity and accessibility for at-risk communities.

The map's insights underscore the importance of balancing safety with the Complex's mission to serve all segments of the population, including those in underserved and higher-crime areas. By addressing these challenges with appropriate security measures, programming, and community partnerships, the proposed Indoor Action Sports Complex can contribute positively to the social and economic fabric of the region.



Source: Esri, 2024.

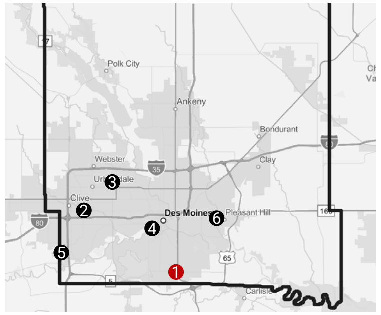
7 SITE ANALYSIS

1.1) SOUTHRIDGE MALL (NW LOT)
1.2) SOUTHRIDGE MALL (OLD YOUNKERS)

Parcel Size: (1.1) 5.7 acres, (1.2) 5.5 acres

Parcel Ownership: Private

Comparative Score / Rank: (1.1) 407 / 3 (1.2) 411 / 2



Strengths

- Sufficient acreage
- Acreage for a Complex expansion
- Acreage for future complement development (may not be directly adjacent to Complex)
- (1.2) Existing structure that could be expanded to fit Complex
- Existing parking
- Existing retail and dining on site
- Ownership plans to develop additional amateur sports amenities (soccer, basketball, baseball, volleyball)
- Ownership interest in adding experiential entertainment offerings to site
- Opportunity to service underserved groups and youth

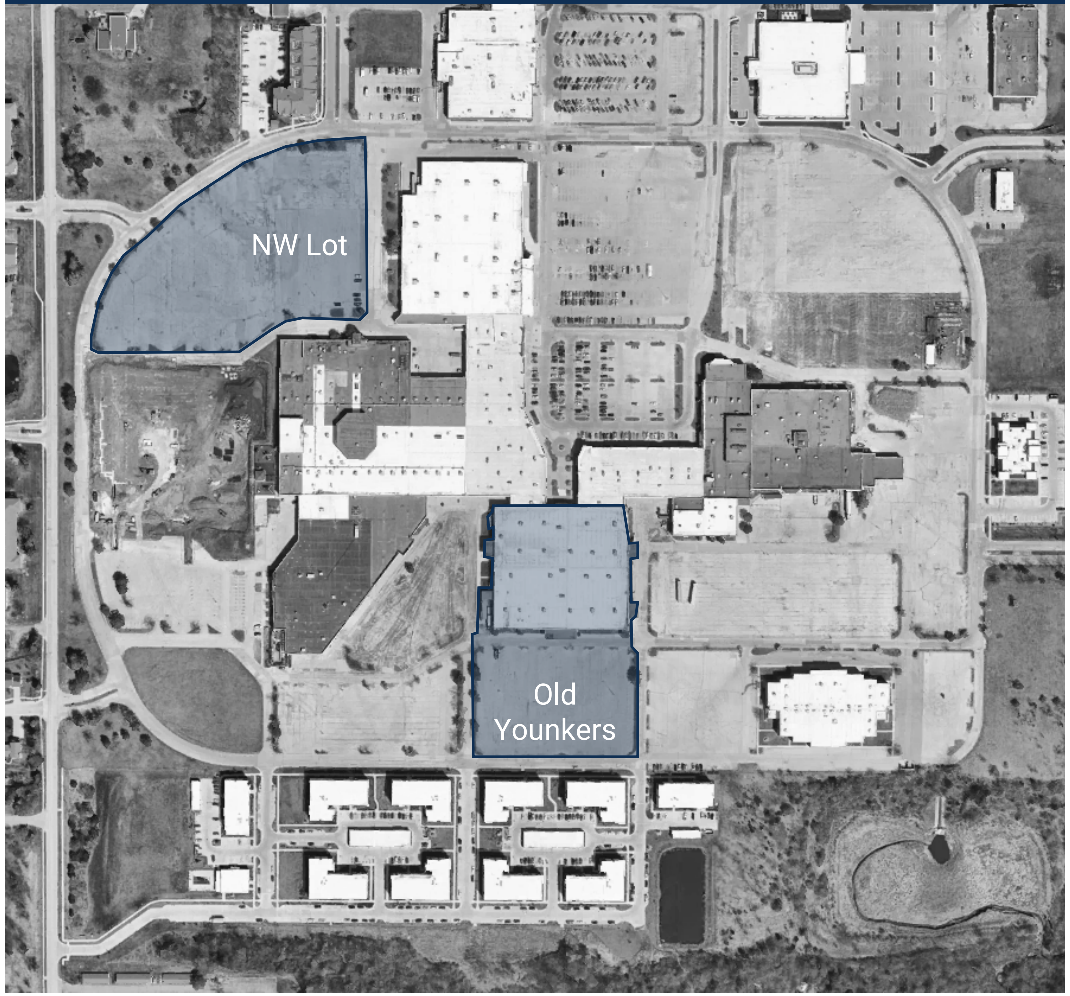
Weaknesses

- (1.1) Requires new build (apart from parking)
- (1.2) Requires building expansion (no parking development required)
- Moderately accessible by local community
- Low visibility
- Distant from concentrations of hotels
- Poor trail connectivity

Key Success Factors

- New facility could be a part of property-wide revitalization master plan
- Conversations regarding partnered planning efforts should be had in near-term
- Ownership indicated that public support is likely to be needed to assist with the build out of the facility
- Shuttling to/from areas with at-risk youth should be prioritized

Overview of Southridge Mall Site



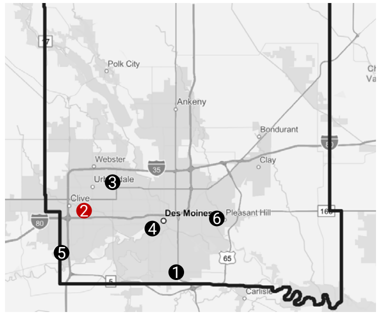
7 SITE ANALYSIS

2.1) VALLEY WEST MALL (NORTH ANCHOR) 2.2) VALLEY WEST MALL (SOUTH ANCHOR)

Parcel Size: (2.1) 3.7 acres, (2.2) 3.7 acres

Parcel Ownership: Private

Comparative Score / Rank: (2.1) 360 / 5 (2.2) 360 / 5



Strengths

- Existing structures that could be expanded to fit Complex
- Acreage for future expansion (may not be directly adjacent to Complex)
- Existing parking
- Existing retail and dining on site
- Ownership open to any development concept (so long as it is mutually beneficial)
- Limited development plans open opportunity for Complex
- Notably accessible by local community
- Proximity to significant hotel inventory
- Good connectivity to trail system

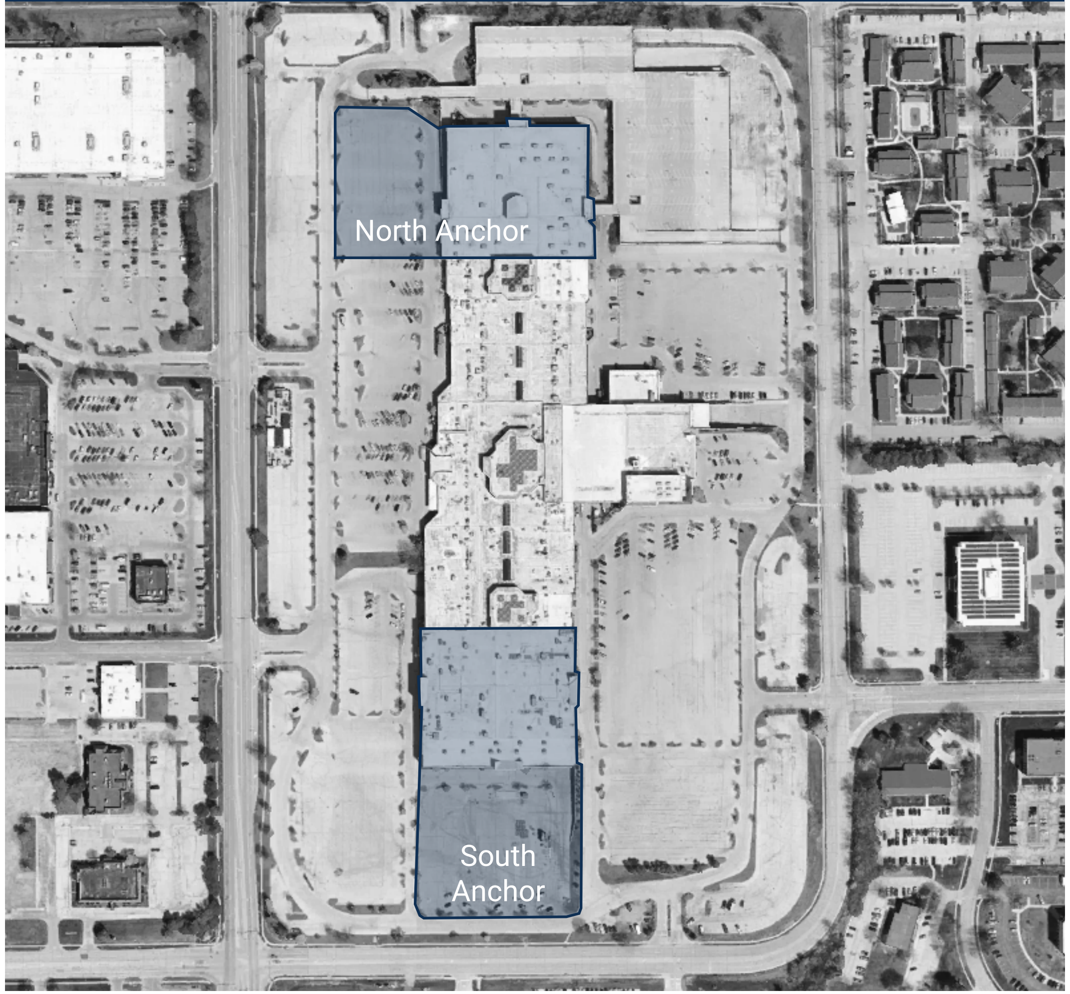
Weaknesses

- Less interest in partnership relative to other interviewed mall owners
- Low opportunity to expand Complex upon development
- Requires building expansion (no parking development required)
- Moderate visibility
- Ownership would likely prefer to sell the entire property at once (65 acres), suggesting that the site may be more of a long-term opportunity than others

Key Success Factors

- The ownership group would entertain any development concept (as long as it is beneficial); conversations regarding the concept should be continued with this group to gauge future development or sales timelines
- Shuttling to/from areas with at-risk youth should be prioritized

Overview of Valley West Mall Site



7 SITE ANALYSIS

3) MERLE HAY MALL

Parcel Size: 5.6 acres

Parcel Ownership: Private

Comparative Score / Rank: 413 / 1

Strengths

- Sufficient Acreage
- Acreage for future complement development (may not be directly adjacent to Complex)
- Existing Parking
- Existing retail and dining on site
- Existing pickleball facility on site, desire to explore more emerging sports and entertainment concepts
- Interest in experiential entertainment offerings on site
- Preferred location for event planners and attendees
- Proximity to hotels, dining, retail, and entertainment
- Strong connectivity to trail system

Weaknesses

- Somewhat limited acreage for future expansion
- Mall ownership unsure if owner is willing to sell site
- Requires new build (apart from parking)
- Moderately accessible by local community
- Somewhat limited visibility
- Limited opportunity to service underserved groups and youth

Key Success Factors

- Synergy with planned and considered concepts for development at the mall including a volleyball facility and hockey arena
- Conversations regarding future plans at the mall and how a new Complex could align with these plans should be had in the near-term
- Conversations with site owner should be had in the near-term
- Planning should consider the site's connectivity to existing and planned trail systems

Overview of Merle Hay Mall Site

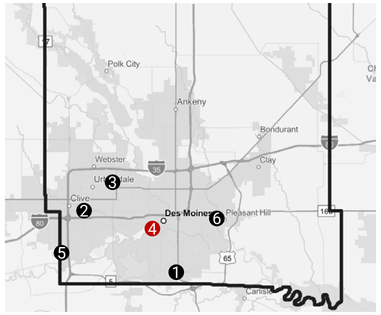
7 SITE ANALYSIS

4) DICO SUPERFUND SITE

Parcel Size: 17.1 acres

Parcel Ownership: Public (subject to change)

Comparative Score / Rank: 382 / 4



Strengths

- Sufficient Acreage (dependent on ownership final decision)
- Acreage for future complement development (dependent on ownership final decision)
- High likelihood of proximate retail, dining, and entertainment development
- Developer interest in experiential entertainment and sporting offerings on site
- Favorable location for event planners and attendees
- Proximity to hotels, dining, retail, and entertainment
- Significant opportunity to service underserved groups and youth
- High visibility
- Strong connectivity to trail system

Weaknesses

- Urban area likely to result in higher development costs
- May have more limited parking availability relative to other sites
- Site is likely to be highly programmed, limiting potential space available for the Complex
- Acreage for future expansion likely to be occupied if facility does not rapidly grow
- Requires new build, significant infrastructure investment required
- More limited interest expressed in the Complex concept relative to other site owners / developers

Key Success Factors

- Value proposition of facility must match goals of Krause development group
- Convenient and navigable ingress/egress from MLK Pkwy must be prioritized
- Complex must have sufficient parking spaces that are exclusive to its users and event goers
- Planning should consider the site's connectivity to existing and planned trail systems

Overview of Dico Superfund Site

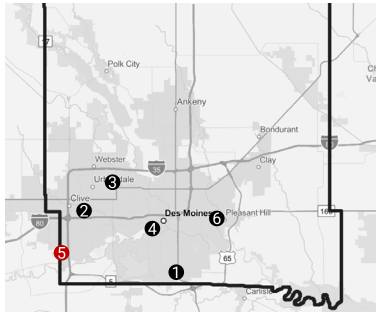
7 SITE ANALYSIS

5) GRAND AVENUE (MIDAMERICAN RECPLEX)

Parcel Size: 68.9 acres

Parcel Ownership: Private

Comparative Score / Rank: 325 / 8



Strengths

- Sufficient Acreage (dependent on ownership final decision)
- Acreage for future complement development (dependent on ownership final decision)
- Synergies with MidAmerican RecPlex, a regionally leading youth and amateur sports facility
- Proximity to hotels
- Good connectivity to trail system

Weaknesses

- Undeveloped land that requires significant infrastructure investment
- May have existing programming planned by developer
- Less attractive location for planners and attendees – far from existing family attractions and downtown Des Moines
- Low opportunity to serve underserved communities and youth
- Low visibility and local accessibility
- Limited proximity to retail and attractions

Key Success Factors

- Ownership group may be interested in unique entertainment and sporting concepts
- Shuttling to/from areas with at-risk youth should be prioritized

Overview of Grand Avenue Site

7 SITE ANALYSIS

6) FOUR MILE CREEK (POLK COUNTY CONSERVATION)

Parcel Size: 38.6 acres

Parcel Ownership: Private

Comparative Score / Rank: 353 / 7

Strengths

- Sufficient Acreage
- Acreage for future expansion
- Acreage for future complement development
- Synergies with nearby assets such as mountain biking, Sleepy Hollow, Polk County Conservation future development plans
- Interest in experiential entertainment and sporting offerings on site
- Shared acquisition/development costs with an interested partner, Polk County Conservation, who desires to purchase the land regardless of partnership

Weaknesses

- Somewhat isolated from existing hotel, dining, and retail
- Undeveloped land that requires significant infrastructure investment
- Less accessible by local community
- Less accessible by underserved communities and youth
- Limited visibility
- Poor connectivity to trail system

Key Success Factors

- New facility could be a part of property-wide revitalization master plan
- Conversations regarding partnered planning efforts with Polk County Conservation should be had in near-term
- Shuttling to/from areas with at-risk youth should be prioritized

Overview of Four Mile Creek Site

7 SITE ANALYSIS

SITE ANALYSIS – OVERALL SUMMARY

Following analysis of the previously outlined criteria, the Merle Hay Mall ranked highest, benefiting from sufficient acreage, proximity to hotels, dining, and retail, and established infrastructure. Conversations should be had between Complex stakeholders, the public sector, and the owner of the parcel to the north of the Mall to discuss potential development opportunities. The Southridge Mall's Old Younkers parcel, scoring 411, is another strong candidate. Its redevelopment potential, adequate acreage, existing parking, and service to underserved communities contribute to its appeal. The Dico Superfund Site, ranked fourth with a score of 382, offers significant acreage, high visibility, and opportunities to serve underserved groups. However, site ownership expressed limited interest in including an Indoor Action Sports Complex within their development.

On the lower end, the Grand Avenue (MidAmerican RecPlex) site, scoring 325, and the Four Mile Creek site, scoring 353, face key challenges. Grand Avenue's proximity to existing sports facilities and hotels is countered by low visibility, limited accessibility by underserved youth, and the need for substantial infrastructure investment. Four Mile Creek provides significant acreage and potential partnerships with Polk County Conservation, but its isolation, lack of nearby amenities, and low visibility hinder its viability. Both sites offer unique opportunities but require significant investment to address their shortcomings.

In summary, the Merle Hay Mall and Southridge Mall's Old Younkers parcel stand out as the most viable sites, offering a balance of accessibility, existing amenities, and development potential. Meanwhile, sites like Grand Avenue and Four Mile Creek, while presenting unique long-term opportunities, face more immediate barriers to implementation.

SITE		SITE 1.1 SOUTHRIDGE MALL (NW Lot)		SITE 1.2 SOUTHRIDGE MALL (Old Younkers)		SITE 2.1 VALLEY WEST MALL (North Anchor)		SITE 2.2 VALLEY WEST MALL (South Anchor)		SITE 3 MERLE HAY MALL		SITE 4 DICO SUPERFUND SITE		SITE 5 GRAND AVENUE (MIDAMERICAN)		SITE 6 FOUR MILE CREEK (POLK COUNTY CONSERVATION)	
Owner		Private		Private		Private		Private		Private		City		Private		Private	
Size (in acres)		5.7		5.5		3.7		3.7		5.6		17.1		68.9		38.6	
SITE ELEMENTS	Weight	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating
Site Suitability	60																
Acreage for Optimized Program Configuration	20	100	5	100	5	40	2	40	2	100	5	60	3	100	5	100	5
Acreage for Future Expansion	5	20	4	20	4	20	4	20	4	15	3	10	2	25	5	25	5
Acreage for Additional Onsite Complementary Development	5	25	5	25	5	25	5	25	5	25	5	25	5	25	5	25	5
Resources and Efforts to Acquire	5	20	4	20	4	15	3	15	3	20	4	5	1	10	2	25	5
Attractiveness of the Site to Event Planners & Attendees	5	25	5	25	5	15	3	15	3	25	5	20	4	10	2	15	3
Magnitude of Necessary Infrastructure Improvements	4	12	3	16	4	16	4	16	4	12	3	8	2	4	1	8	2
Local Accessibility	6	18	3	18	3	24	4	24	4	24	4	18	3	12	2	18	3
Service to Underserved Groups	6	24	4	24	4	18	3	18	3	12	2	24	4	12	2	12	2
Visibility	4	8	2	8	2	12	3	12	3	12	3	20	5	8	2	12	3
Other Visitor Amenity Availability	40																
Proximity to Hotels	13	39	3	39	3	65	5	65	5	52	4	65	5	52	4	26	2
Proximity to Restaurants/Bars	13	52	4	52	4	52	4	52	4	52	4	65	5	39	3	39	3
Proximity to Shopping/Retail	8	40	5	40	5	40	5	40	5	40	5	32	4	16	2	24	3
Proximity to Entertainment/Attractions	6	24	4	24	4	18	3	18	3	24	4	30	5	12	2	24	4
Total Weighting	100																
TOTAL SCORE		407		411		360		360		413		382		325		353	
SITE RANK		3		2		5		5		1		4		8		7	

Subjective Rating

1 = Lowest/Weakest

5 = Highest/Strongest

Scoring

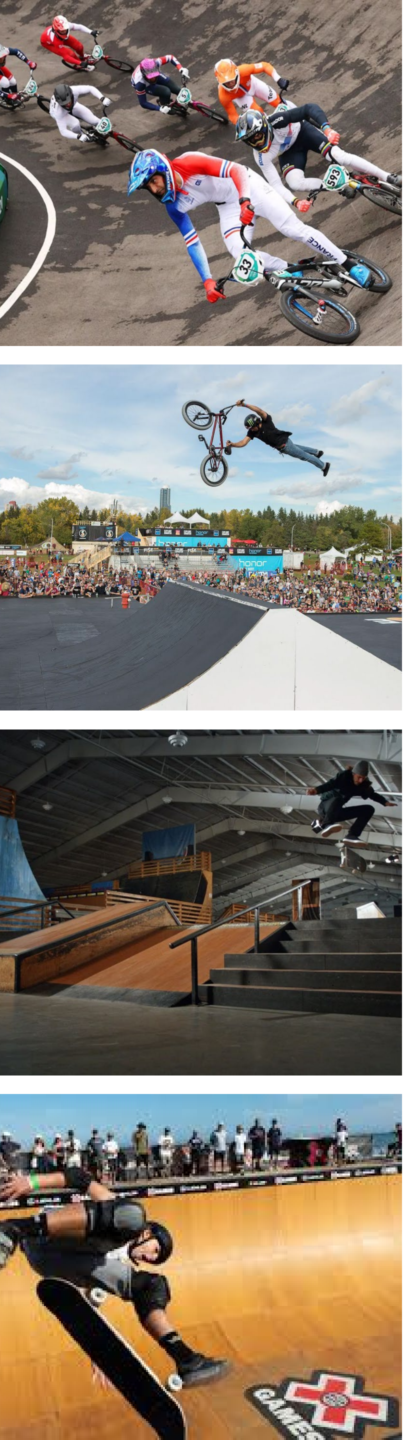
500 = Maximum Score

Greater Than 400 = Excellent/Very Good Score

350-400 = Good Score

250-350 = Suggests Important Site Challenges/Limitations

Less Than 250 = Poor Score



GOVERNANCE AND MANAGEMENT

8 GOVERNANCE & MANAGEMENT

GOVERNANCE & OVERSIGHT MODEL

The purpose of this section is to evaluate and provide recommendations concerning governance for a potential new Indoor Action Sports Complex in Central Iowa. Governance includes both facility/complex ownership, as well as management/operating structure and approach with regard to booking/scheduling/discounting policies and rates. The following presents a summary of typical industry model groupings relating to owner/operator models utilized in the amateur sports facility industry:

PUBLIC MODEL:
Under the public model, the land and facility are owned and operated by a public entity, such as municipal government's parks and recreation department (i.e., City or County). Typically, the primary goal is to first and foremost provide access to residents of the municipality. Facilities that operate under this model generally attract the greatest percentage of local participation and attendance. Publicly-operated facilities are typically funded through the municipal government owner's general fund and/or other dedicated public sector monies. Additionally, these facilities typically rely on an annual financial operating subsidy provided by the public sector owner.

PRIVATE MODEL:
Under the private model, both the land and the complex are privately-owned, developed, maintained and operated. Facilities under this model tend to be more specialized and cater to a narrower segment of the marketplace. This operational model is designed for profit, with pricing and booking strategies that often limit interest and use by most local community and neighborhood leagues and tournaments. Funding for such facilities usually comes from private equity and revenue generated through programmed tournaments, training, camps and league play.

PUBLIC/PRIVATE MODEL:
Under the public/private model, the land, and often the facility as well, are typically owned by a public entity and leased or contracted to a third-party private entity responsible for operating and maintaining the complex. The goals and objectives of this model can vary widely in examples throughout the country; however, many attempt to balance objectives of (1) economic impact generation, (2) local community use opportunities, and (3) operational self-sufficiency. Under an industry best practices approach, these issues are negotiated and agreed upon by the parties in advance and appropriate booking, pricing, and operational guidance is memorialized within the ultimate lease/management agreement. Similar to the private model, many facilities under this model tend to be more specialized and cater to a narrower segment of the marketplace than the public model or the public/non-profit model. Some facilities under this model are operationally self-sufficient and do not require annual subsidy or external funding support, while some still require annual financial operating support by the public sector facility owner.

PUBLIC/NON-PROFIT MODEL:
Under the public/non-profit model, the land and facility are generally owned by a public entity and the complex is leased and operated by a 501(c)3 non-profit. The non-profit operator often utilizes relationships with local sports organizations to generate strategic partnerships, serving to share operating/maintenance responsibilities and expand revenue-generating and use opportunities. The non-profit entity typically gives first priority to its partnerships, with public use given a secondary priority. This model generally serves more of a public utility than that of a Public/Private model and relies on public funding, as well as the access that non-profit organizations have to a number of applicable grant programs that can either contribute to the construction of the complex or offset operating expenses.

GOVERNANCE & OVERSIGHT MODEL (continued)

SPORTS AUTHORITY MODEL:
In some cases throughout the country, independent sports authorities have been established to govern and oversee all or a subset of facilities in a community. Sports authorities are often established via local or state enacting legislation and tend to operate in both sports tourism and local sports/recreational realms. Many operate as quasi-public, nonprofit organizations that are not constrained by the traditional rules, policies, regulations, and operating procedures that exist with local government agencies/departments. Many authorities own their own facilities and have their own independent funding source (i.e., dedicated tax), including the ability to issue dedicated bonds or debt to fund construction and/or operations. Examples include the Spokane Public Facilities District, the Minnesota Sports Authority and the New Jersey Sports and Exposition Authority. Note that these Authorities typically own and/or operate large professional sports facilities, though several communities that CSL has worked with nationally are discussing the development of similar entities to own and operate planned youth/amateur sports complexes.

There are several reasons why the Sports Authority model can be advantageous. Specifically:

1. **Opportunity to create a "regional community" venue** – In some communities, the "destination" (from the perspective of tourism and travelers) may encompass a number of cities, towns and even counties. The boundaries of specific municipalities are often irrelevant from the perspective of travelers and tournaments. An Authority can be directed by a Board featuring representatives from each of these municipalities, as well as an advantageous mix of private and public sector entities.
2. **Insulation from municipal politics and funding** – Authorities typically are independent, quasi-governmental agencies, often with their own Board of Directors and possessing their own taxing authority. This tends to be more advantageous on a host of levels, providing protection against municipal politics and annual allocation of funding, as well as offering more flexibility than provided under sometimes strict employment and operating codes pertaining to municipally-owned facilities.
3. **Dedicated sports / tourism focus** – Authorities that own and operate complexes of this nature often are dedicated in focus and mission. In most cases, this means that their purpose is to develop, market and operate sports and recreation programs and facilities within a given area. Their Boards tend to be carefully selected with a mix of governmental representatives, community/business leaders and representatives of various local athletic organizations. Many of the most successful case studies of local sports and recreation programs/facilities involve dedicated authorities that continue to build resources and regional participation levels over time. A smaller, but growing, number of authorities have a "sports tourism" focus, rather than the broader sports, recreation and leisure focus of typical parks, sports and recreation authorities in many markets.

The governance of a potential new Indoor Action Sports Complex in Central Iowa presents various models, each with distinct advantages and challenges. The Public Model prioritizes local access but may require financial subsidies; the Private Model focuses on profit, limiting local community engagement; the Public/Private Model seeks a balance of economic impact and community use, sometimes achieving operational self-sufficiency; the Public/Non-Profit Model leverages non-profit partnerships for broader public utility, relying on both public funding and grants; and the Sports Authority Model offers regional benefits and insulation from municipal politics, typically with dedicated resources for sports tourism. Each model reflects different priorities and operational strategies suited to specific community goals and economic contexts. Whichever governance model is ultimately chosen, it will be crucial for the operating entity to work closely with USA BMX, local bicycle and skateboard stakeholders, and the sports sales team at Catch Des Moines to secure high-impact events at the Complex.

GOVERNANCE & OVERSIGHT MODEL (continued)

With respect to the potential new Indoor Action Sports Complex in Central Iowa, the following represents key ownership and governance recommendations.

FACILITY OWNER & MODEL:

Given the expected mission of a potential new Complex that emphasizes balancing sports tourism and local usage, along with the project's expected physical and operational characteristics, it is believed that the appropriate governance and oversight model for a new Central Iowa Indoor Action Sports would be a hybrid public/non-profit model. This would involve public ownership via some governmental entity or sports authority (such as Polk County, the City of Des Moines, or a newly-created sports authority focusing on sports tourism), a new non-profit entity, and an Oversight Board. Through coordination and collaboration with the Complex's owner, non-profit management team, tenant groups, and other local area facilities, the Oversight Board would be responsible for the Complex's schedule and use calendar, as well as its rates and discounting policies. This type of structure could work to ensure equitable scheduling and rates, as well as mitigating cannibalization of local user group activity at existing local sports facilities. This would allow for appropriate scaling should the initial sports product development represent one of several phases of development of a larger recreation campus destination. The Complex's owner outlines facility policies informed by aims and goals for the facility. To refine these policies and ensure that they are being implemented by the non-profit, the Complex's owner would establish an Oversight Board populated by appointed facility and community stakeholders.

OVERSIGHT BOARD:

The Oversight Board, a handful of appointed individuals with facility and community ties, has de facto control of the schedule and use calendar for the new Indoor Action Sports Complex, as well as rates and discounting. The Oversight Board would initially work with the owner (County, City or Authority) and the non-profit to establish formal booking and scheduling policies, as well as policies related to rates and discounting. The Oversight Board would be best served if it included a mix of public sector and private sector members, including representatives of the Owner (County, City or Authority), the non-profit, key tenants/user groups, other existing local area athletic facilities, schools, tourism organizations, and/or other local business leaders. The Board would have an established set of bylaws and would meet monthly.

NON-PROFIT ENTITY:

The non-profit entity created for the Complex would be responsible for operating the new Complex as guided by defined Owner/Oversight Board policies. An executive director would directly report to the owner's designee (or the Oversight Board, if it is organized with expanded responsibilities), and is responsible for hiring and overseeing the on-site Complex staff. The non-profit would act independently of any public entity, and would be able to create staff positions and make capital improvement decisions they deem necessary, as long as they receive approval from the Oversight Board. It will be critical for this entity to coordinate with Polk County Conservation to organize freestyle-focused programming at the Complex that complements activity at Lauridsen Skatepark.

FUNDING & PARTNERSHIP OPTIONS

For sports complex and sports tourism facility projects throughout the country that have similar development costs as the recommended Complex building program, public sector revenue sources typically fund all or a majority of the capital development. While a majority of the construction costs associated with the identified Central Iowa Complex would likely need to be funded through County and/or City sources, private sector sources via public/private partnership (P3) or fundraising could help contribute to capital funding for the projects. The ultimate financing structure of any new sports facility is dependent on political, economic and other issues of various parties that may be involved in developing potential new sports complexes.

Upfront participation in capital construction of sports tourism facilities by private sector parties has become significantly less prevalent. In recent years, most sports tourism and amateur sports complexes involving P3 frameworks/partners involve private sector management and operating revenue/profit sharing with the public sector facility owner, rather than upfront capital to assist with construction funding.

Public sector mechanisms and sources that are most often utilized to fund comparable sports facilities located throughout the region and country include:

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

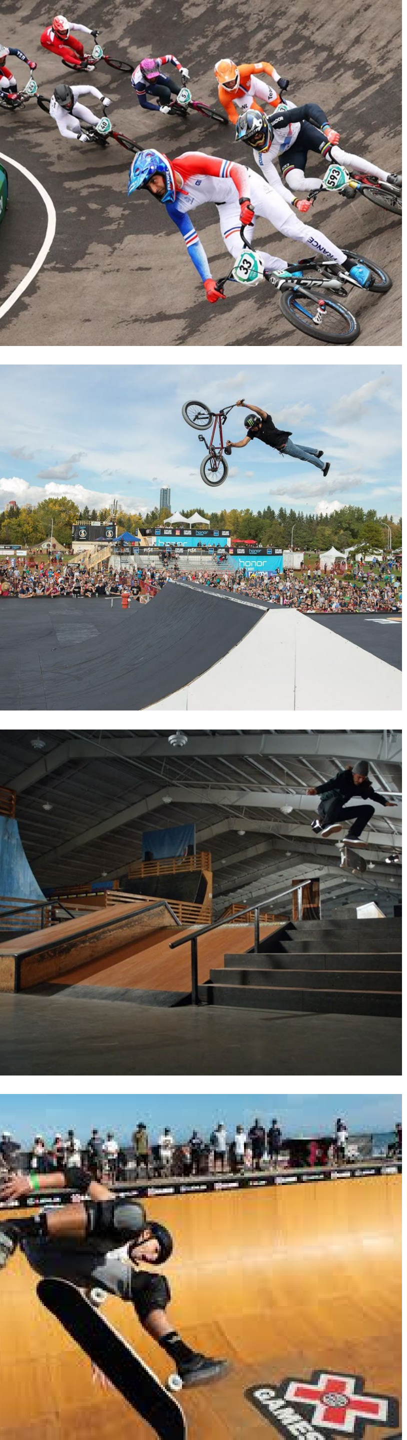
Under situations where bonds have been issued, debt service is often supported by local tax revenue, which has tended to include the following:

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

Potential sources of private sector funding for a new Indoor Action Sports Complex could include, but are not limited to:

- Naming rights/sponsorships.
- Equity contributions (with or without a formalized P3).
- Grants/donations.
- Vendor rights.
- Facility use agreements.
- Registration fee surcharge.
- Parking fees.
- Other sources.

Modest potential may exist for the local public sector to partner with Woodward ownership to develop another multi-faceted action sports destination in Central Iowa. The City or County could issue a potential public/private partnership (P3) opportunity for the Complex in order to better gauge this type of private sector interest in participating in such a project.



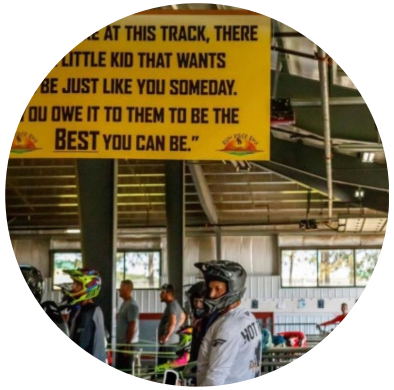
COST / BENEFIT ANALYSIS

9 COST / BENEFIT ANALYSIS

OVERVIEW & KEY ASSUMPTIONS

An analysis was completed to produce key cost/benefit estimates associated with the identified program for a new Indoor Action Sports Complex in Central Iowa. These estimates are designed to assist project representatives in assessing the financial and economic effects of a Complex and cannot be considered a presentation of expected future results. Accordingly, the analysis of potential financial operating results and economic impacts may not be useful for other purposes. The assumptions disclosed herein are not all inclusive but are those deemed to be significant. Because events and circumstances frequently do not occur as expected, there usually will be differences between estimated and actual results and these differences may be material. Key assumptions include:

- The assumptions used in the analysis are based on the market research and analysis, past experience with hundreds of similar sports facility projects, local market visits, information provided by the Client and other local stakeholders, industry trends, and comparable facility performance results.
- For purposes of this analysis, it is assumed that the Complex consists of the recommended building program previously presented, and that it is located in one of the top-rated sites analyzed in the Site Analysis.
- For purposes of this analysis, construction is assumed to commence in 2025 and be completed in 2026, while the first full year of new Complex operations is assumed to be 2027. A stabilized year of operation is assumed to occur by the fifth full year of operation (assumed 2031).
- Estimates throughout this analysis are presented in 2025 dollars.
- A constant annual inflation rate of 3.0 percent has been assumed for 20-year net present value calculations.
- It is assumed the new Indoor Action Sports Complex will be publicly-owned, overseen by an owner-appointed Oversight Board, and operated by a non-profit entity.
- It is assumed that the Complex will be aggressively marketed, will provide competitive rates, and will balance the attraction/accommodation of local and non-local events and activities.
- It is assumed that 80/35 BMX will close upon the opening of the Complex, and the former's rider base will transfer to the new Complex.
- Other than the closure of 80/35 BMX, it is assumed that there are no significant or material changes in the supply or quality of existing competitive venues in the local and regional marketplace, nor are there any significant or material changes to local and national event industry trends.
- Additional planning (i.e., site selection, soil and environmental testing, architectural design, etc.) must be completed before more precise estimates of the Complex's ultimate construction/development and operating costs can be made. Also, upon completion of further planning, revenue and expense assumptions should be updated to reflect changes to the assumptions made herein.



OVERVIEW & KEY ASSUMPTIONS (continued)

A summary of key assumptions related to the overall analysis of costs and benefits is presented below.

1) COSTS (Construction & Operations)

Preliminary analyses were completed to estimate order-of-magnitude construction costs and the annual financial operating performance associated with a new Indoor Action Sports Complex in Central Iowa. Construction cost estimates were generated by using industry per-unit data adjusted for conditions in Central Iowa and cost data of comparable action sports facility/complex projects, modified for time and locations.

To produce the financial operating estimates, a computer-based model was developed incorporating comparable facility data and the estimated levels of utilization and attendance derived from the market analysis to generate estimates with regard to potential annual facility operations. Revenues including memberships, event registration fees, concessions, and advertising and sponsorship dollars were estimated. Expenses including salaries/wages/benefits (including contracted services costs), utilities, maintenance & repair, materials & supplies, insurance, general & administrative, programming, and others were estimated. The comparison of revenues and expenses enables stakeholders to evaluate the level of facility-supportable revenues or public subsidies that may be required for annual Indoor Action Sports Complex operations. It has been assumed that a new Complex would be publicly-owned and managed by a non-profit entity. Figures only represent the annual operations of the new Indoor Action Sports Complex itself and do not include construction debt service payments, capital repair/replacement reserve funding, or other non-operating income and expenses.

2) BENEFITS (Economic Impacts & Other)

The ability of a sports facility to generate new spending and associated economic impact in a community is often the driving influence behind a public entity deciding to invest in the development and/or operation of such facilities. Beyond generating new visitation and associated spending in local communities, sports complexes also benefit a community in other important ways, such as providing venues for local recreation activities and drawing new visitation/traffic into target areas. The impact of any new sports facility/complex project is maximized when out-of-town athletes/participants and family members or guests spend money in a community while visiting. This spending by visitors represents new money to the community hosting the event. This new money then creates multiplier effects as the initial spending is circulated throughout the local economy. It is important to note that spending estimates associated with the potential new Indoor Action Sports Complex only represent spending that is estimated to be new to Central Iowa (net new spending), and directly attributable to the operation (and existence) of the new Complex.

9 COST / BENEFIT ANALYSIS

PRELIMINARY CONSTRUCTION COST ESTIMATES

High-level construction cost estimates for the recommended Indoor Action Sports Complex building program are presented within the adjacent graphic.

The Complex's structure is assumed to consist of a quality pre-fabricated building with a hard construction cost of approximately $90 (2024 dollars) per square foot. The key interior components, including a BMX racetrack, pump track and skatepark, are budgeted at a combined $5.5 million. Various other facility-related components, including fixed equipment (such as the build outs required for a pro shop and bike rental post), portable furnishings, general sitework and parking total an estimated $3.0 million. With a combined hard construction cost of $21.0 million, the project is estimated to have a soft cost figure of $5.3 million (assumed to be 25 percent of hard costs). Soft costs include land acquisition, fees for legal, design, planning and other professional support, and various project contingencies.

It should be noted that the recommended building program previously presented is highly unique, and that project costs associated with a new-build Action Sports Complex will likely run substantially higher than other facilities nationally due to a combination of three factors: the facility's indoor building program, the recommended size and quality of its facilities, and the national trend of rising construction costs.

Across multiple public assembly facilities industries (i.e., convention, sports, entertainment, hospitality), construction costs have escalated anywhere between 30 and 50 percent since the pre-Pandemic period due to a multitude of factors. These rising costs reinforce the need to design and build a facility that is truly market supportable and specifically tailored to meet market demand and minimize extraneous costs. Many of the more commercially driven scenarios presented previously (i.e., including a full-service restaurant or family entertainment center) would greatly increase project development costs, making funding such a project much more difficult.

Lower project costs may be achievable through program downsizing and/or value engineering. A lower-cost scenario that lacks the freestyle facilities is presented later herein as part of a comparative analysis that measures the costs and benefits of such a program with the larger, recommended building program.

DESCRIPTION	UNIT	QTY.	UNIT PRICE	EST. COST
Building:				
Pre-Fabricated Structure	Per SF	140,000	$90	$12,600,000
Total Playing Surface Costs				$12,600,000
Activity Facilities:				
BMX Racetrack	Per SF	24,000	$150	$3,600,000
Pump Track	Per SF	10,000	$75	$750,000
Skatepark	Per SF	15,000	$75	$1,125,000
Total Activity Facility Costs				$5,475,000
Other Building Costs:				
Fixed Equipment	% of Building Costs		4%	$504,000
Other Furnishings (seating, clocks, etc.)	% of Building Costs		2%	$252,000
General Sitework	% of Building Costs		10%	$1,260,000
Parking	Per Parking Space	500	$1,900	$950,000
Total Other Costs				$2,966,000
TOTAL PROJECT:				
Hard Construction Costs				$21,041,000
Other Soft Costs				$5,260,250
Total Estimated Project Costs				$26,301,250

9 COST / BENEFIT ANALYSIS

ECONOMIC IMPACT CONCEPTS & METHODS

Investment in a new Indoor Action Sports Complex will be expected to provide substantial quantifiable benefits. These quantifiable benefits often serve as the “return-on-investment” of public dollars that are contributed to develop a facility/complex project and site. Quantifiable measurements of the effects that a facility project could have on the local economy are characterized in terms of economic impacts and fiscal impacts. Direct spending represents the primary spending that would occur as a result of the construction and operations of the new Indoor Action Sports Complex. Direct spending occurs in three ways:

(A) CONSTRUCTION SPENDING

Construction materials, labor, design and professional fees, and other soft cost spending that is generated during the planning and construction of the new Indoor Action Sports Complex.

(B) IN-FACILITY SPENDING

Direct spending is generated by visitors and participants at the Indoor Action Sports during the course of annual operation. This spending occurs with respect to items such as space and equipment rentals, admissions, food & beverage, merchandise, sponsorship and advertising, and retail leases.

(C) OUT-OF-FACILITY SPENDING

Outside the Indoor Action Sports Complex itself, additional direct spending is generated in city, county and regional areas by overnight guests, attendees, participants, event staff, and visiting facility users on lodging, food and beverage, retail, entertainment, transportation, and other such items in connection with their visit to the area.

A primary intent of this analysis is to estimate the direct spending that could occur at a new Indoor Action Sports Complex itself, in order to approximate the potential associated tax revenues generated from such spending. The majority of Construction and In-Facility Spending would be estimated to occur within Central Iowa. Additionally, net new impacts will be generated throughout Central Iowa, primarily relating to Out-of-Facility Spending (i.e., spending occurring off of a new Indoor Action Sports Complex site by visitors to Central Iowa on items such as hotels, restaurants, retail, transportation, etc.).

9 COST / BENEFIT ANALYSIS

CONSTRUCTION IMPACTS

The impact of the construction phase is determined by the magnitude and nature of the construction expenditures as well as the geographic region in which they take place. The exhibit below summarizes the estimated net new economic impacts that could be generated by the construction of an Indoor Action Sports Complex in Central Iowa. These impacts represent one-time impacts from construction.

For purposes of this analysis, hard and soft construction costs associated with a potential new Complex are assumed to approximate $26.3 million. Soft construction costs are estimated to be 30 percent of hard construction costs. It is assumed that 20 percent of spending on materials and 30 percent of spending labor would occur within the local area, thereby representing net new spending for the local economy. This results in approximately $6.4 million in net new spending for Central Iowa.

As shown, the estimated economic output (direct spending plus indirect and induced spending) in Central Iowa associated with the construction period is estimated at $10.9 million (in 2025 dollars). This impact figure is lower than the assumed total construction cost expenditures amount due to the assumed leakage of a subset of materials and labor spending outside of Central Iowa.

CONSTRUCTION ECONOMIC IMPACT	One-Time Impacts
Direct Spending	$6,443,806
Indirect/Induced Spending	$4,424,434
Economic Output	**$10,868,241**
Personal Income	$3,659,905
Employment (full & part-time jobs)	77

9 COST / BENEFIT ANALYSIS

IN-FACILITY IMPACTS: UTILIZATION

To calculate in-facility impacts, CSL prepared estimates of event activity and utilizations associated with the recommended building program. These programs, broken down by category, are presented within the adjacent graphic.

As shown, the facility is estimated to have a paid BMX membership base of 220 individuals in Year 1, assuming all BMX members from 80/35 transfer to the new Complex. As the Complex grows in usage and popularity among the community, this membership base is estimated to more than double by Year 5 to 375 paid memberships. Meanwhile, it is assumed that the Complex will also offer a monthly membership option to BMX, skate, and other bike riders. These paid facility memberships are estimated to grow from 100 in Year 1 to 220 by Year 5. Eighty-five (85) memberships are assumed to be donated to underprivileged youth within the community.

The Complex is anticipated to host a significant amount of local BMX programming, including open local competitions, practices, camps, and private rentals. Total BMX programs are estimated to grow from 165 in Year 1 to 195 in Year 5.

As indicated by interviewed BMX event organizers, the Complex would likely host a number of invitationals, regional events, state qualifiers, and national competitions upon opening. Note that National events include existing Gold Cup competitions organized by USA BMX, as well as potential new events that could be created by USA BMX in partnership with Central Iowa BMX stakeholders.

The Complex's skatepark and pump track facilities are estimated to accommodate a total of local 252 programs by Year 5. This includes 200 "open practices" (i.e., open ride days for skaters and freestyle BMX riders). As the Complex matures, it is anticipated that management will organize more self-produced invitationals and host more major skateboard tours.

Memberships	Year 1	Year 2	Year 3	Year 4	Year 5
Total Paid BMX Memberships	220	250	300	340	375
Total Paid Facility Memberships	100	150	175	195	220
Free Trial Memberships	50	65	80	85	85
All Memberships	**370**	**465**	**555**	**620**	**680**

BMX Programming

BMX Local Programming	Year 1	Year 2	Year 3	Year 4	Year 5
Open Local Competitions	90	90	90	90	90
Open Practices	40	40	40	40	40
Lessons/Camps/Clinics	20	25	30	35	40
Private Rentals	15	20	25	25	25
Total BMX Programs	**165**	**175**	**185**	**190**	**195**

BMX Special Events	Year 1	Year 2	Year 3	Year 4	Year 5
Special Invitationals	2	2	3	3	4
State Qualifiers	1	1	1	1	1
State Championships	1	1	1	1	1
Regional Qualifiers	1	1	1	1	1
National / Gold Cup	1	1	1	1	1
Total BMX Special Events	**6**	**6**	**7**	**7**	**8**

Skatepark and Pump Track Programming

Skatepark and Pump Track Local Programming	Year 1	Year 2	Year 3	Year 4	Year 5
Open Local Competitions	5	8	12	15	18
Open Practices	200	200	200	200	200
Lessons/Camps/Clinics	20	20	20	25	25
Private Rentals	5	6	7	8	9
Total Skatepark and Pump Track Programs	**230**	**234**	**239**	**248**	**252**

Skatepark and Pump Track Special Events	Year 1	Year 2	Year 3	Year 4	Year 5
Special Invitationals	1	2	3	4	4
BMX Tours	1	1	1	1	1
Skate Tours	1	1	1	2	2
Total Skatepark and Pump Track Special Events	**3**	**4**	**5**	**7**	**7**

TOTAL PROGRAMS	**404**	**419**	**436**	**452**	**462**

9 COST / BENEFIT ANALYSIS

IN-FACILITY IMPACTS: ATTENDANCE

Each of the events and programs presented on the previous page would draw in various levels of participants and spectators to a Central Iowa Indoor Action Sports Complex. Estimates of attendance levels associated with each program type are summarized in the adjacent graphic.

Due to the moderate BMX and action sport participation identified within the Central Iowa region, it is anticipated that a new Complex would follow an aggressive five-year ramp up period whereby its development will spur interest among the community in BMX and skateboarding. In this way, attendance is estimated to significantly grow from approximately 46,400 in Year 1 to nearly 73,300 by Year 5.

This change in attendance has material impacts on the financial performance of the Complex, as discussed on the following page.

BMX Programming

BMX Local Programming	Year 1	Year 2	Year 3	Year 4	Year 5
Open Local Competitions	13,500	14,850	17,550	20,250	20,250
Open Practices	2,000	2,500	3,000	3,500	3,500
Lessons/Camps/Clinics	1,000	1,875	2,625	3,500	4,500
Private Rentals	938	1,250	1,563	1,563	1,563
Total BMX Programs	**17,438**	**20,475**	**24,738**	**28,813**	**29,813**

BMX Special Events	Year 1	Year 2	Year 3	Year 4	Year 5
Special Invitationals	600	750	1,260	1,440	2,160
State Qualifiers	600	630	660	690	720
State Championships	420	455	490	525	560
Regional Qualifiers	1,140	1,140	1,140	1,140	1,140
National / Gold Cup	2,100	2,100	2,100	2,100	2,100
Total BMX Special Events	**4,860**	**5,075**	**5,650**	**5,895**	**6,680**

Skate Park and Pump Track Programming

Skatepark and Pump Track Local Programming	Year 1	Year 2	Year 3	Year 4	Year 5
Open Local Competitions	600	960	1,620	2,250	2,700
Open Practices	20,000	20,000	22,500	25,000	25,000
Lessons/Camps/Clinics	1,000	1,000	1,250	1,875	1,875
Private Rentals	313	375	438	500	563
Total Skatepark and Pump Track Programs	**21,913**	**22,335**	**25,808**	**29,625**	**30,138**

Skatepark and Pump Track Special Events	Year 1	Year 2	Year 3	Year 4	Year 5
Special Invitationals	360	780	1,260	1,800	1,920
BMX Tours	780	960	1,080	1,140	1,200
Skate Tours	1,050	1,225	1,400	3,150	3,500
Total Skatepark and Pump Track Special Events	**2,190**	**2,965**	**3,740**	**6,090**	**6,620**

TOTAL ATTENDANCE	**46,400**	**50,850**	**59,935**	**70,423**	**73,250**

IN-FACILITY IMPACTS: FINANCIAL OPERATIONS

The adjacent exhibit presents a summary of projected annual financial operating results associated with the potential Indoor Action Sports Complex in Central Iowa. Based on the preliminary analysis, upon stabilization (assumed fifth full year of operations), the potential Complex is estimated to run at an annual operating loss of approximately $62,800, before debt service and capital repair/replacement funding. Therefore, it will be important to identify a funding source that could help cover any annual operational deficits. Amateur sports complexes throughout the country often rely on revenues from hotel tax, hotel assessments (often called "tourism districts"), or their respective municipality's general fund to offset potential operational losses.

Key revenue drivers include event and program income, which is estimated to generate over $201,400 during a stabilized year of operations, as well as concessions ($113,900), Complex memberships ($92,400) and income received from a pro shop tenant ($50,000).

Given the size of the Complex and its indoor nature, it is likely to have material utilities, maintenance and operations costs. For purposes of this analysis, we assume two full-time staff members at the Complex. However, a volunteer-driven model similar to Rum River could be employed which could greatly reduce staffing and contract labor costs. This would greatly enhance the Complex's ability to breakeven or operate at a surplus operationally.

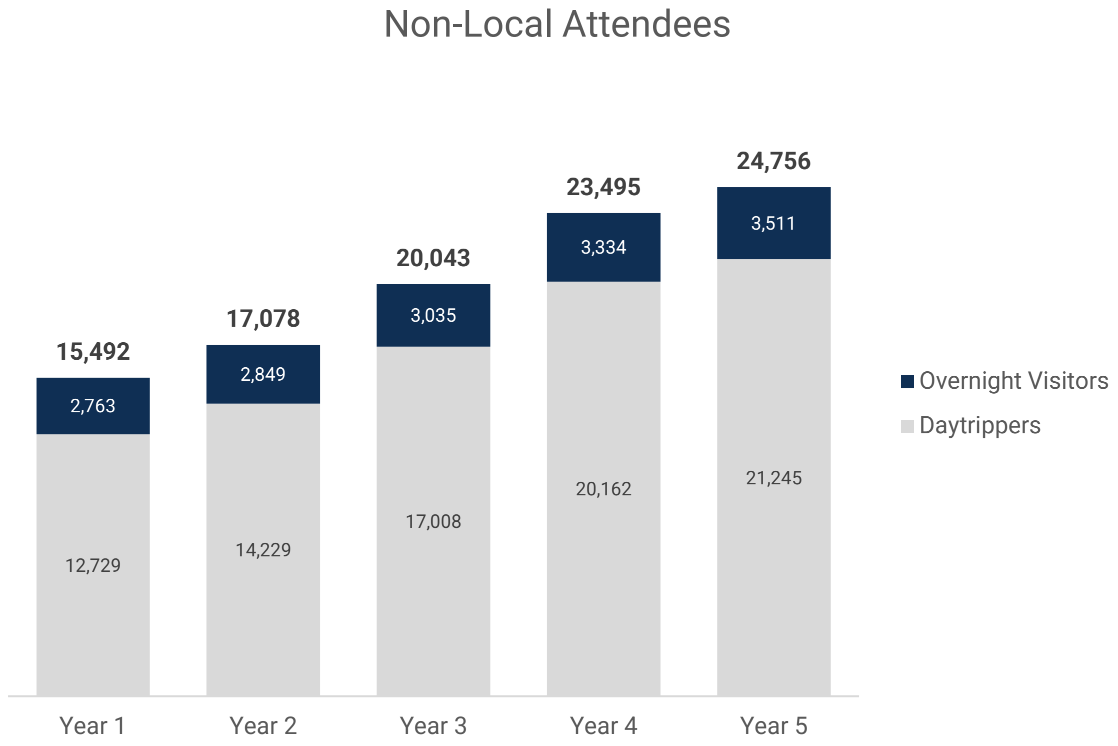
Further, as previously noted, if a private partner wishes to develop a full-service restaurant, family entertainment center, or other revenue-generating amenity within the Complex, this could generate additional tenant revenue ranging from $50,000 to upwards of $200,000 annually, which would help the Complex breakeven financially.

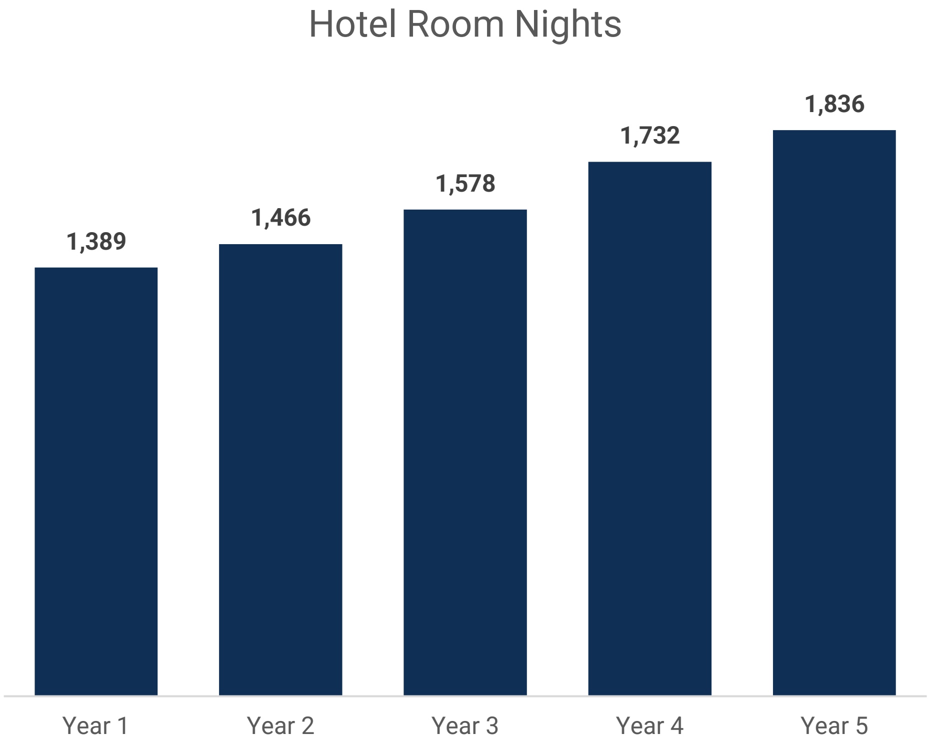
Revenues	Year 1	Year 2	Year 3	Year 4	Year 5
Memberships	$42,000	$63,000	$73,500	$81,900	$92,400
Net Event Income	$112,200	$135,100	$171,600	$185,800	$201,400
Net Concessions Income	$69,200	$76,400	$88,700	$108,300	$113,900
Bike/Equipment Rental Income	$7,200	$9,600	$10,800	$12,000	$13,200
Pro Shop Tenant Income	$50,000	$50,000	$50,000	$50,000	$50,000
Sponsorships	$25,000	$25,400	$25,700	$26,000	$26,300
Total Revenue	**$305,600**	**$359,500**	**$420,300**	**$464,000**	**$497,200**

Expenses	Year 1	Year 2	Year 3	Year 4	Year 5
Full-Time Staffing	$174,700	$177,000	$181,600	$187,000	$188,500
Contract Labor	$29,700	$31,400	$34,900	$38,900	$40,000
Utilities	$106,300	$112,400	$124,800	$139,100	$143,000
Maintenance	$37,200	$38,500	$41,400	$44,600	$45,500
Operations	$28,900	$29,500	$30,700	$32,100	$32,500
Insurance	$102,400	$103,700	$106,500	$109,600	$110,500
Total Operating Expenses	**$479,200**	**$492,500**	**$519,900**	**$551,300**	**$560,000**
Net Operating Income / Loss	**($173,600)**	**($133,000)**	**($99,600)**	**($87,300)**	**($62,800)**

OUT-OF-FACILITY IMPACTS: NON-LOCAL ATTENDEES AND HOTEL ROOM NIGHTS

Event activity at the envisioned Central Iowa Indoor Action Sports Complex is anticipated to attract significant visitation from several hours away. A summary of estimated overnight visitors and daytrippers, or those visitors who come from outside the Central Iowa region, is presented in the graphic to the left. As shown, total non-local visitation is estimated to grow from approximately 15,500 attendee days in Year 1 to 24,800 attendee days by Year 5. Assuming 2.25 persons per hotel room, the Complex is estimated to generate just over 1,800 hotel room nights during Year 5.



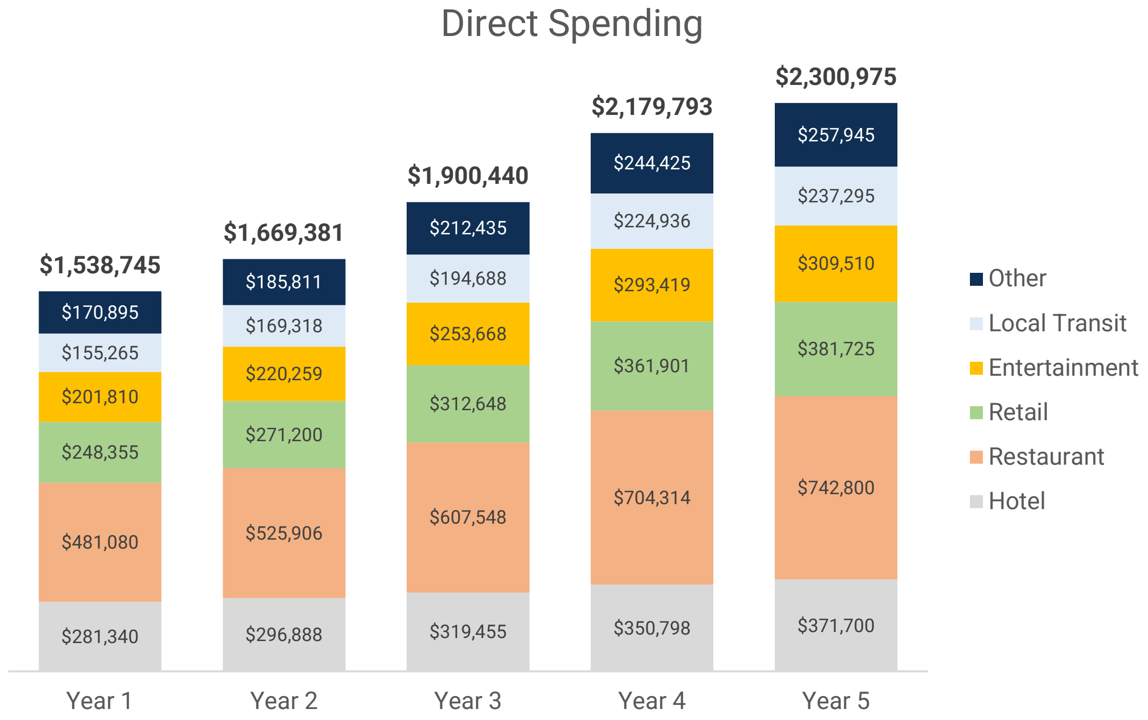


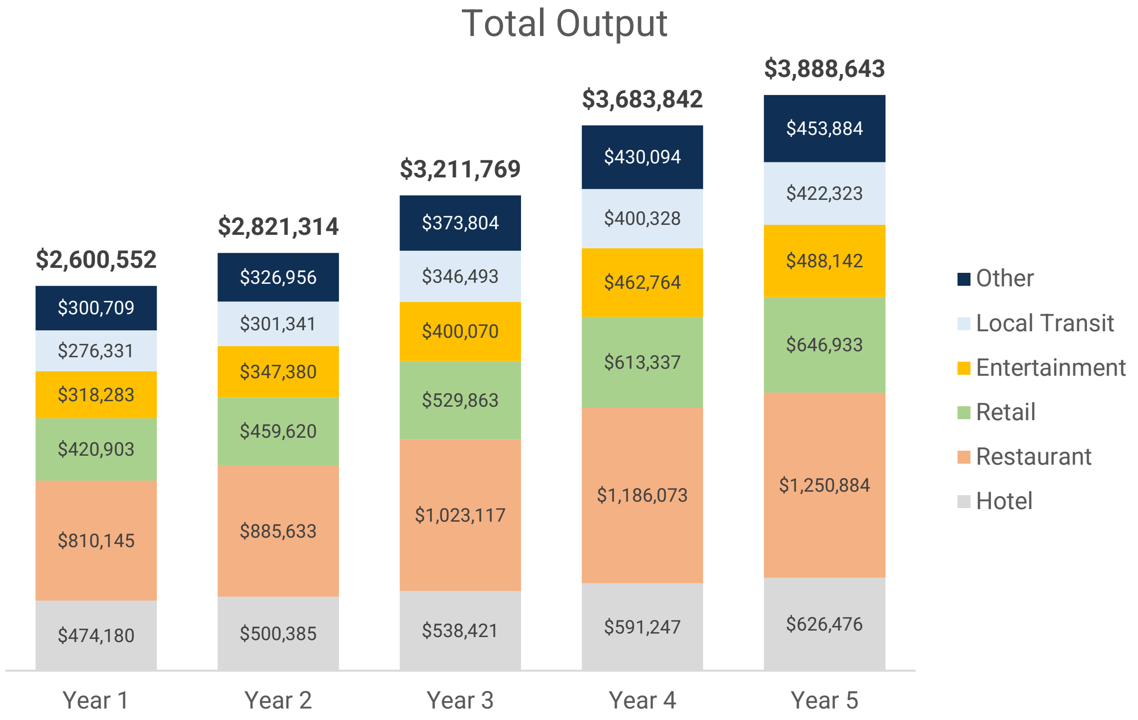
9 COST / BENEFIT ANALYSIS

OUT-OF-FACILITY IMPACTS: DIRECT SPENDING AND TOTAL ECONOMIC OUTPUT

CSL has developed models that incorporate event, attendance, attendee origin and other data to measure the amount of direct spending associated with Complex event activity. Spending on hotels, restaurants, shopping, entertainment, local transit and other sectors have been included in this analysis. As shown, event attendees are estimated to generate just over $2.3 million per year for the local economy.

The total output estimates to the right include the dollars expected to be re-spent and distributed throughout the local economy. Total output is estimated to grow from $2.6 million to $3.9 million by Year 5.



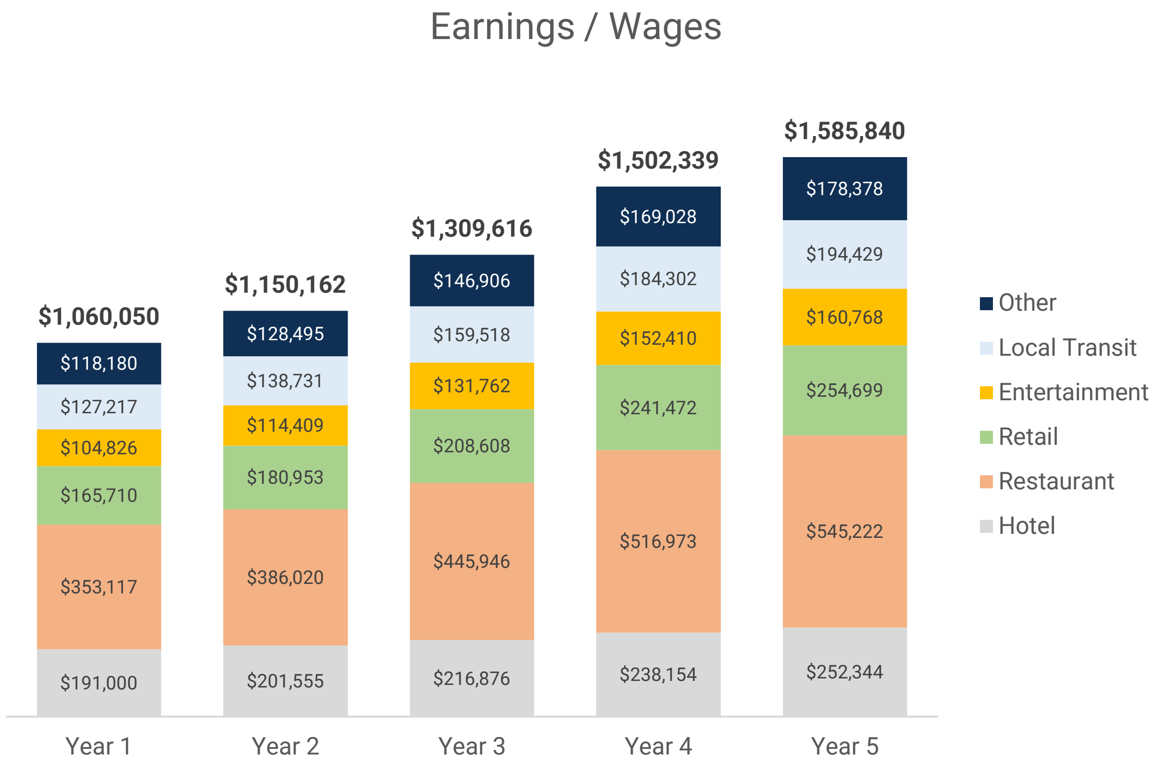


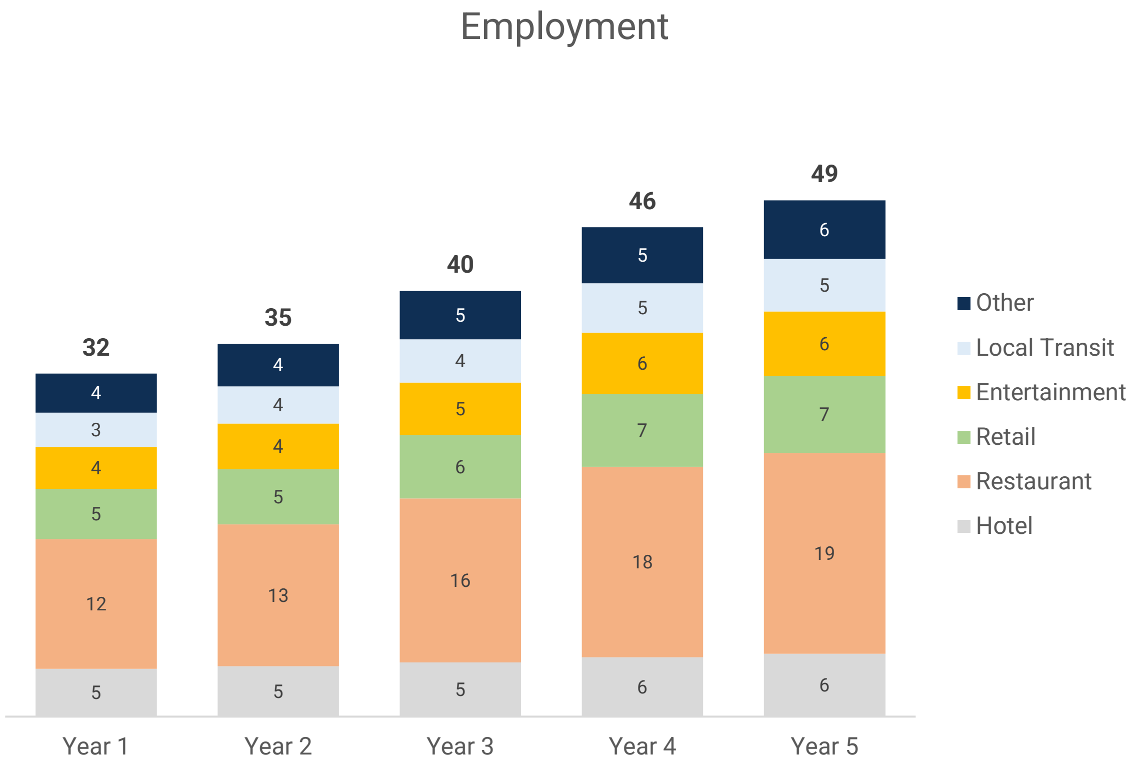
9 COST / BENEFIT ANALYSIS

OUT-OF-FACILITY IMPACTS: EARNINGS AND EMPLOYMENT

The total output generated by Complex events includes a component of employee earnings. These earning impacts take place throughout the economy, certainly in the hospitality sector, but also within other sectors. As shown, events at the Complex are estimated to generate nearly $1.6 million in earnings for the community by Year 5.

Net new economic impacts would also create an estimated 49 jobs within the hospitality sector by Year 5.

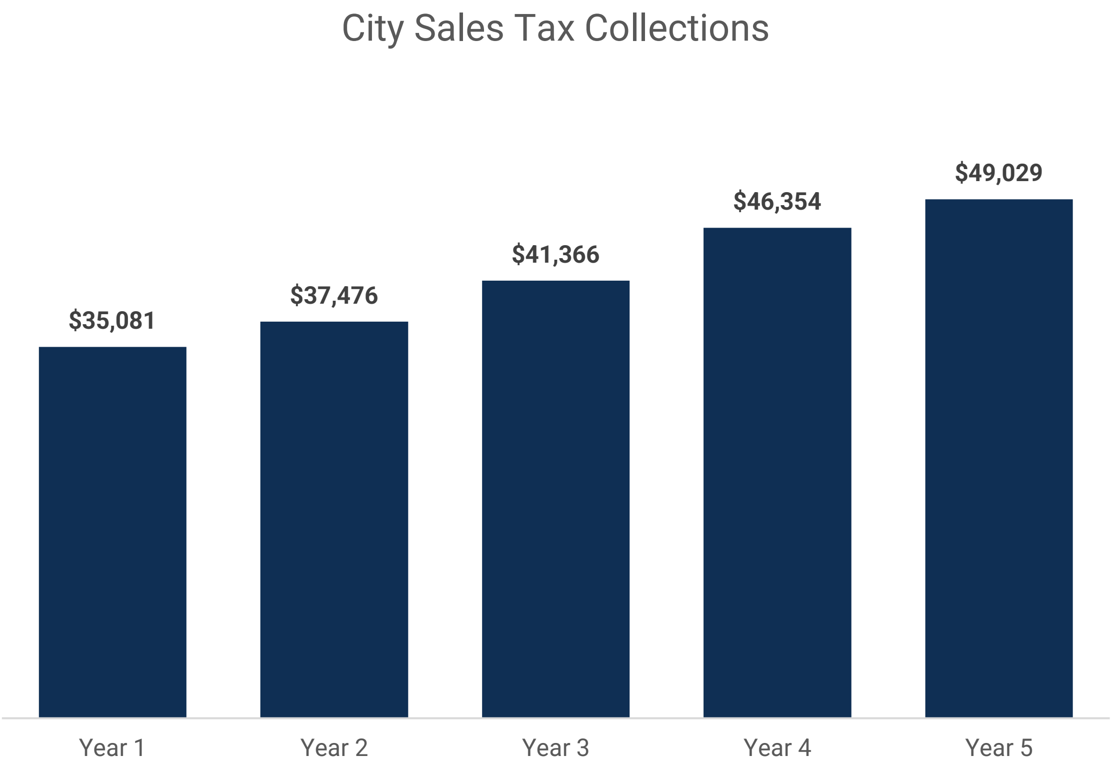

Earnings / Wages

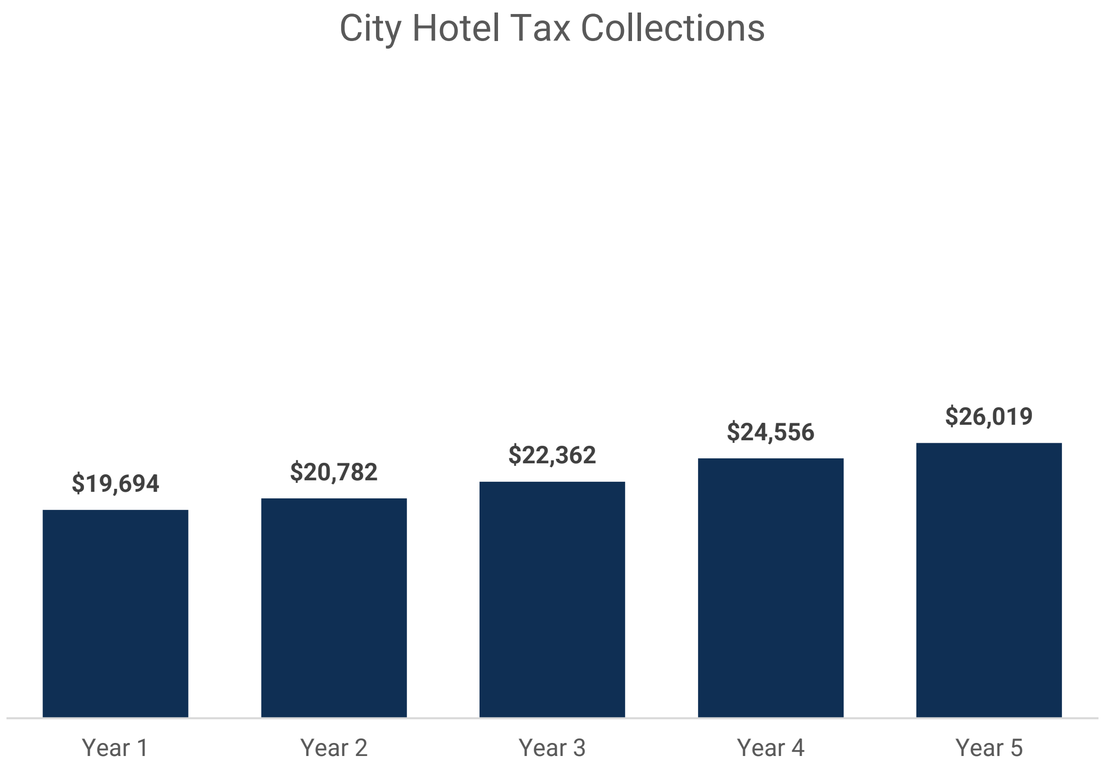

Employment

9 COST / BENEFIT ANALYSIS

OUT-OF-FACILITY IMPACTS: CITY TAX COLLECTIONS

Direct spending will help to support the generation of new tax revenues collected by the City of Des Moines. The exhibit below presents estimates of sales and hotel tax revenues associated with event activity at the proposed Complex. City sales tax collections are estimated to approximate $49,000 in Year 5, while hotel tax collections are estimated to rise to $21,700. In total, the City is estimated to collect approximately $62,600 in tax collections due to event activity at the Complex.





(D) QUALITATIVE IMPACTS / OTHER BENEFITS

In addition to the more quantifiable benefits, some benefits related to the construction and operation of a potential Central Iowa Action Sports Complex cannot be quantitatively measured. Beyond the economic activity and jobs indirectly provided, these types of non-quantifiable impacts of a project of this nature and scope can serve to elevate Central Iowa and its profile and brand as a sports tourism destination and as a quality place to live, work, learn and play. These qualitative benefits tend to be a critical factor in the consideration of public and private investment in projects of this nature, particularly those involving a major investment in community assets and infrastructure. These include issues pertaining to quality of life (through accommodating local activities that would otherwise not be able to be accommodated in Central Iowa), ancillary economic development facilitation, employment opportunities, community pride and other issues. Potential non-quantifiable benefits could include:

- Potential Transformative and Iconic Effects – High profile, sports facility projects, like the proposed Indoor Action Sports Complex, can have extensive, long-lasting transformative impacts on the Central Iowa community and destination, in terms of quality of life, community prestige, perception by visitors and non-locals, and other such effects.

- Quality of Life for Residents – New/enhanced sports, recreation and special event facilities such as an Indoor Action Sports Complex provide diversified activities for local residents and families, which can make communities in Central Iowa more attractive and enjoyable places to reside. Quality public assembly facilities can contribute to enhancing community pride, self-image, exposure and reputation. All these items can assist in retaining and attracting an educated workforce, particularly younger adults who often desire quality sports, recreational, meeting, entertainment, cultural, and leisure amenities.

- New Visitation – New visitors will be attracted to the area because of races, competitions, clinics, camps, and other activity. These attendees, in turn, may elect to return to the area later with their families, etc. for a leisure visit after visiting the area for the first time.

- Spin-Off Development – New retailers/businesses tend to invariably sprout up near major new sports facility developments, spurred by the operations and activities associated with the facilities, representing additions to the local tax base. Enhanced economic growth and ancillary private sector development (or improvement) surrounding the ultimate site for a new Indoor Action Sports Complex in Central Iowa may be spurred by the investment in the project.

- Anchor for Revitalization – Major sports facility and other tourism facility developments can oftentimes serve as an anchor for larger master plans and revitalization efforts. State-of-the-industry amateur sports complexes, like the proposed Indoor Action Sports Complex in Central Iowa, can attract hundreds of thousands of attendees annually. This added visitation to an area or district can be critical to the health and vitality of existing nearby businesses, as well as providing the incentive for future private investment in business improvements and expansions.

- Other Benefits – Increased synergy with the other athletic, event, hospitality and entertainment facilities can lead to increased tourism activity to Central Iowa.

9 COST / BENEFIT ANALYSIS

ALTERNATIVE SCENARIOS

To show the incremental impacts of various program and site selection decision-making, an analysis of events, attendance, financial performance and economic impacts has been prepared that compares the recommended building program with three “lesser” scenarios. These scenarios either exclude the skatepark and pump track facilities from the building program to achieve a lower project cost, and/or assume the Complex is developed in a remote greenfield site instead of an active entertainment district. Each scenario is summarized in the graphic below.

	Scenario 1A	**Scenario 1B**	**Scenario 2A**	**Scenario 2B**
	Full Program, District Anchor	Limited Program, District Anchor	Full Program, Remote Location	Limited Program, Remote Location
Building Footprint	140,000	100,000	140,000	100,000
Preliminary Project Cost	$26.3M	$18.6M	$26.3M	$18.6M
BMX Track	Yes	Yes	Yes	Yes
Street/Park Facilites	Yes	No	Yes	No
Other Amenities	Yes	Yes	Yes	Yes
Location Type	Walkable, highly trafficked district	Walkable, highly trafficked district	Remote greenfield or industrial site	Remote greenfield or industrial site

9 COST / BENEFIT ANALYSIS

ALTERNATIVE SCENARIOS: COMPARATIVE IMPACT ANALYSIS

A comparison of various performance metrics associated with a mature fifth year under each scenario is presented below. A gradient of green, yellow, and red has been applied to visually rank the annual economic output and ratio of annual output-to-development costs associated with each scenario. Green indicates the the highest values and red reflects the lowest. As shown, the recommended building program, Scenario 1A, has the highest estimated economic output and output-to-development cost ratio. The added costs of the skatepark and pump track facilities provide a net benefit for the Complex in the form of added, consistent foot traffic throughout the year. Further, a highly trafficked location such as a mall or downtown site is estimated to drive greater visitation to the Complex, likely converting casual passersby into BMX, skate or bike enthusiasts each year.

Annual Impacts	Scenario 1A Full Program, District	Scenario 1B Limited Program, District	Scenario 2A Full Program, Standalone	Scenario 2B Limited Program, Standalone
Total Development Costs	$26.3M	$18.6M	$26.3M	$18.6M
Special Events	15	8	14	7
Paid Memberships	375	300	320	320
Attendee Days	73,300	36,500	57,800	31,400
Hotel Room Nights	1,840	1,250	1,390	1,190
Financial Performance	($88,400)	($124,100)	($133,500)	($194,500)
Direct Spending	$2,301,000	$1,457,400	$1,641,900	$1,183,900
Economic Output	$3,888,600	$2,463,000	$2,776,900	$2,002,700
Output-to-Development Cost Percentage	15%	13%	11%	11%
Wages/Earnings	$1,585,800	$1,004,200	$1,131,400	$815,900
Jobs Supported	49	31	35	25
City Tax Collections	$49,000	$32,300	$35,000	$27,800