December 2, 2020

Sun Prairie Tourism Commission
c/o City of Sun Prairie Economic Development Department
300 E Main Street
Sun Prairie, WI 53590
Submitted via e-mail to: nstechschulte@cityofsunprairie.com

RE: Community Tourism Readiness and Feasibility Analysis Next Steps

Dear Mr. Stechschulte:

The Hunden Strategic Partners Team (HSP or Team), which includes professionals from Winger Marketing is pleased to provide the following summary of next steps for future tourism-related asset research identified by the recently completed tourism analysis.

The Sun Prairie Tourism Commission retained the Hunden Strategic Partners Team, including marketing experts at Winger Marketing, to conduct a Tourism Readiness Analysis and high-level feasibility study for Sun Prairie. The goal of this study was to determine strengths, weaknesses, opportunities and threats regarding Sun Prairie’s existing and potential tourism assets, including various types of attractions, facilities and events that attract overnight visitors from outside the community.

Recommendations and Best Practices

Upon completion of this analysis, the HSP Team made recommendations and provided a short list of assets and programming to prioritize for further study. The following items detail the summary of these recommendations:

- **Tournament Sports Complex.** The Sun Prairie area has a strong supply of sporting and recreation facilities that serve the local marketplace. However, a youth sports tournament complex development is one of the biggest opportunities for Sun Prairie to induce tourism. Recommended options include:
  - New indoor/outdoor development with courts and turf fields that can mitigate seasonality and host an array of sporting and community events,
  - An expansion of the existing Sun Prairie Ice Arena and number of ice sheets. The Ice Arena has demonstrated tournament success that suggests opportunity for an impactful expansion to attract more regional and national events,
  - Renovation/Adaptive Reuse of Angell Park into a Multipurpose Event/Entertainment Complex that can cater to community events and attract larger regional events, such as races, concerts, and company retreats.

- **Entertainment Facility.** Events and entertainment are another opportunity for Sun Prairie to induce visitation. The local market is lacking an entertainment/events facility that can host community events and mid-tier concerts/shows. Recommended options include:
An outdoor amphitheater that can complement the growing downtown area and host non-ticketed and ticketed events,

A indoor concert/performing arts venue that can provide the community with an additional entertainment option and host smaller ticketed acts,

A small conference facility that can host local meetings, banquets, and small conferences and work with local hotels.

**Events.** Improving or expanding existing events is one of the most efficient ways Sun Prairie can begin to grow visitation and generate room nights. HSP recommends the following existing events/new potential events be analyzed in a deeper study:

- Sweet Corn Festival – remove carnival from festival programming, program additional music and regional live acts, and balance ownership and involvement between the City and the Chamber.
- Groundhog Day – continue and expand the fun run, consider evening programming that could drive overnight stays, tie-in with the celebration of winter season/winter sports.
- Taste of the Arts Fair – expand to complement other events and potentially drive overnight stays. Consider the pros and cons of hiring an art fair management group.
- Development of a new semi-annual/annual event, potentially in conjunction with an event/festival management entity.

**Address COVID-19 –** Post about current city restrictions and guidelines regularly so visitors are aware and/or feel safe about visiting. Show pictures of people wearing masks around Sun Prairie and center posts around COVID friendly activities.

**Marketing and Social Media.** HSP and Winger Marketing provided recommendations to develop the Sun Prairie Tourism Brand, create an independent web presence, and market to a wider audience. However, these measures will be most effective if the previous recommendations are accomplished before embarking on a new campaign. Winger Marketing recommends the following priorities in regard to marketing, social media and online presence:

- **Tourism Website** – a unique website featuring quality visuals dedicated to tourism should be created once the brand is updated and adjusted. Next steps include the evaluation of available content. Once the website is completed, further recommendations include:
  - Create a call-to-action on the site, “Stay in Sun Prairie” or “Visit Sun Prairie”. Show prospective visitors your diversity, restaurants, and entertainment, and that you are an alternative to Madison hotels.
  - Create a way to capture leads on the site by asking visitors to sign-up for e-newsletters, to register for a visitors’ guide or to “like us” on social media. Consider a digital visitors’ guide and a possible print version that is mailed upon request.
  - Leverage existing resources Trip Advisor, Yelp, Google. Take control so your top businesses come up in search and encourage businesses to add listings and reviews. Request “as seen on Trip Advisor” stickers for businesses.

www.hundenpartners.com
Consistent use of Hashtags on social media to attract and engage visitors, such as #VisitSunPrairie, #SunPrairieFun, #StayinSunPrairie, or #SunPrairieLove.

Clearly define strategy and messaging for social media, including what is promoted on the downtown Facebook page and what gets promoted on the visitor’s Facebook page.

Use the Sun Prairie brand on each social media channel consistently. Instagram is currently inactive for Visit Sun Prairie.

Create a YouTube Channel for Sun Prairie. Use consistent images to brand the channel, and tag and add meta descriptions to videos already online.

Leverage shorter videos on the website to highlight Sun Prairie (:45 to :90).

Expand and update calendar of events that highlights most popular annual events. Add “Events” page into primary navigation and submit events to Yelp and other online event sites.

Highlight more attractions in Sun Prairie.

Expand reach of website and social media.

Identify events in Madison where you can do social media outreach and/or a digital ad campaign to attract attendees for a visit to Sun Prairie.

Create online campaign for Visit Sun Prairie (i.e. “A Weekend in Sun Prairie”). Utilize digital ads to attract visitors and identify bloggers and websites that list attractions in Wisconsin and submit Sun Prairie attractions (with professional photography) to be considered.

Regarding a recommendation for an Art Fair productions company, reach out to Amy Amdur at Amdur Productions. 847-926-4300. The firm currently produces all of the major art fests in Chicago and also handles Milwaukee’s Third Ward Art Festival.

- **“Shop Local for the Holidays” Campaign** – Highlight local businesses and collaborate to create gift guides and deals. Promote “holiday stays”. The Visit Milwaukee (#SeasonOfGivingMKE) page is a good example of how they are creating a larger campaign linked to their website for this idea.

- **Contests and Giveaways** – Run photo contest of best Sun Prairie photos; do a gift card giveaway with a local restaurant or shop for winners.

- **Promote Outdoor Activities** – If applicable, promote Christmas light tours/attractions, Christmas tree farms, hiking and outdoor dining options.

- **Winter BINGO** – Activity for tourists, take BINGO idea from Downtown Sun Prairie page.

- **Groundhog Day** – Leverage Facebook Live to engage with followers, friends and residents. Share the video on the electronic billboard in town!
Social Selling – Encourage restaurants and local shops to explore the Facebook “shop” option if they don’t currently sell online. Also, encourage them to use this time to solicit endorsements and reviews or amp up their own social presence.

Future Phases of Study

The Hunden Strategic Partners Team can assist the Sun Prairie Tourism Commission by managing future tourism-related asset research identified by the recently completed tourism market analysis. The value that HSP brings to this assignment is the existing relationship(s) and experience with these types of destination assets. A high-level summary of options are listed below, though a full scope and fee breakdown can be provided upon request.

- **Event Opportunity Analysis.** HSP can provide a closer look at Sun Prairie’s existing events, such as the Sweet Corn Festival and Groundhog Day, and provide recommendations for expansion or improvement. In addition, HSP can evaluate additional opportunities for new events. The study scope and fee would depend on how many events were being evaluated but could be tailored to range from **$20,000 to $40,000**. Possible tasks for this study include:
  - Current Event Profiles
  - Event Opportunity Analysis
  - Demand Interviews
  - Implications and Recommendations
  - Demand and Financial Projections
  - Economic Impact Analysis

- **Facility Optimization Analysis.** HSP can provide assessments of existing venues, including the SPIA or Angell Park, and provide recommendations on programming, governance and the need for any improvements or expansions. The study scope and fee would depend on which venues were being evaluated but could be tailored to range from **$30,000 to $50,000**. Possible tasks for this study include:
  - Profile of Existing Venue Structures
  - Market Analytics for Venue Uses
  - Governance Trends and Best Practices
  - Implications and Recommendations
  - Projection of Improved Performance
  - Next Steps/Action Plan

- **Market and Financial Feasibility & Economic Impact Analysis.** For any proposed new development, including a new sports or event complex, HSP will perform a full financial feasibility study as well as an economic impact analysis to determine what type of facility the market would support. The
study scope and fee would depend on how many facility types were being evaluated but could be tailored to range from **$40,000 to $80,000**. Possible tasks for these studies include:

- Overview of Industry Trends,
- Local and Regional Market Analyses (sports, meetings/events, and/or entertainment etc.), Including Supply and Demand Inventory
- Tournament Opportunity Analysis
- Hotel Market Trends and Analysis, as applicable
- Demand Interviews and Surveys with Event Planners and Promoters
- Comparable Facility Case Studies
- Recommendations and Site Implications
- Demand and Financial Projections
- Economic, Fiscal, and Employment Impact Analysis

### Branding Discovery Process (Phase I)

Winger Marketing recommends two future phases of study related to the marketing and social media efforts of Sun Prairie. The first phase of the branding process starts with an online audit of both the tourism brand, and competitor/comparable cities in order to get a snapshot of the landscape. This audit will help us determine and document what makes your brand unique – your vision, values, attributes, and customers’ engagement habits based on personas. We’ll visually capture your taste preferences in a series of mood boards, which we’ll work together to create. We’ll review any existing business planning documents, including current branding and marketing assets, to start laying out a brand strategy. This process allows us to determine the best way to align all existing assets under one unified brand to communicate one cohesive story and messaging. The estimated timing for this type of study is two (2) weeks, and the estimated pricing is **$4,000**. Deliverables include:

- Mood board to capture the essence of the brand.
- Defining the target audience and the customers you can best serve.
- Defining the unique selling points of the tourism brand and what sets you apart from other comparable cities.
- The overall vision and inspiration for your brand and city, and how they can support each other.

### Strategy and Messaging Development (Phase II)

Identify and unlock the potential of the tourism brand while laying out the brand strategy. This phase allows us to build the foundation for creating your brand. The estimated timing for this type of study is one (1) month, and the estimated pricing is **$4,000**. Deliverables include:

- Development of the compelling story and mission behind the tourism brand.
- A clear strategy for confidently communicating the brand, including key message development.
o A positioning statement, brand clarifier, and tagline that become the foundation of all messaging and storytelling about the tourism brand. A positioning statement expresses how your business uniquely fulfills your target customers’ needs; a tagline summarizes your benefits, clarifies what you do, and creates a desired emotional response to your audience.

- **Visual Identity and Brand Design (Phase III).** Using the strategy, messaging, and audit as the foundation for this phase, we’ll now begin the identity development and creating what the brand is going to look like. The estimated timing for this type of study is two (2) months, and the estimated pricing is $6,000. Deliverables include:
  o At least 3-4 logo concepts for initial presentation with 2 rounds of revisions.
  o 1 final logo with distinctive visual identity including scalable vector logo files, including black and white, color and alternate versions.
  o Single-page style guide to document all elements of your visual brand (logo, branding elements, colors, fonts, graphic treatments and social media thumbnails). Your style guide will be an invaluable resource and reference on all marketing projects to ensure consistency across all assets that fall under the tourism brand.

- **Website Design (Phase IV).** You now have your branding in place, so let’s show it off. The biggest touchpoint for the tourism brand is your website. In this phase, we’ll work with your developer on creating page mockups, defining the overall look and feel of the website, selecting a template, and content development. These files will be handed over to your developer for final implementation and coding. The estimated timeframe for this project is 2-3 months, not including development time. Pricing is dependent on scope. Deliverables include:
  o Page mockups for primary pages (including final graphics).
  o Site navigation structure.
  o All copy and content.

- **Execution and Extension to Marketing Assets (Phase V).** Using the established brand direction, this phase will allow us to begin extending the branding and identity to other assets that fall under the tourism brand. This includes, but not limited to, marketing assets, leave-behinds, business cards, social media, email marketing, and more. We’ll work together to define the initial assets that we would need to develop. Timing and pricing are dependent on scope, and on the assets being developed. Deliverables include:
  o Branded email marketing template. Show and polish your professionalism when you send your newsletter, events, or other communications to your audience. This will also help with building up your leads.
  o Branded social media profile images (as needed by platform). This includes: thumbnails, profile pictures, cover images.
  o Social media feed design and graphic templates for social media posts. Give your social feeds a customized, on-brand look and feel (up to 5 post types).
o Branded PDF outreach tool/press kit that highlights your credibility, product line, and unique story. Use this PDF to make a personal connection with potential press and partnership opportunities.

o Suggested add-on: Coordination of a lifestyle photoshoot. Great photography is essential to the success of your brand and your website. To ensure that your photography complements the other work Winger Marketing is creating for you, we can work with your photographer on the style and look to ensure we are telling a complete story and showing the full benefits of Sun Prairie.

The Hunden Strategic Partners Team will provide all of these assets under a time structure and pricing that is flexible to the needs of the City of Sun Prairie. Detailed scopes and fees for any of the future work phases listed above can be provided upon request. Should you have any questions, please contact me directly at 312.933.3637 or at rhunden@hundenpartners.com. We appreciate the opportunity to continue working together.

Sincerely,

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(O) 312-643-2500
(M) 312-933-3637
(F) 312-643-2501
rhunden@hundenpartners.com
Given the global public health crisis impacting the world’s economy, the data and analysis should be considered to be from, and applicable to, the pre-COVID-19 pandemic timeframe that began in February and March of 2020.

Real estate development will likely be severely dampened during the recovery period. Events and festivals will also be severely challenged during the pandemic and the recommendations here are meant for post-pandemic reality.

The trends in real estate usage may also adjust, such as a stronger work-from-home dynamic, lessening the need for large office spaces generally. At-home delivery of retail and restaurant items may impact the future of such development, accelerating a trend that was already occurring, at least in the retail space.

On a positive note, during any recessionary period, the cost of labor and materials for real estate development generally declines, making projects more viable from a cost perspective.

HSP suggests planning for an update and/or next step analysis once the economy has generally recovered for a measurable period.
Project Orientation

The Sun Prairie Tourism Commission retained the Hunden Strategic Partners (HSP) team, including marketing experts at Winger Marketing, to conduct a Tourism Readiness Analysis and high-level feasibility study for Sun Prairie. The goal of this study is to determine strengths, weaknesses, opportunities and threats regarding Sun Prairie’s existing and potential tourism assets, including various types of attractions, facilities and events that attract overnight visitors from outside the community.

HSP conducted three virtual open houses, allowing dozens of community members to share their knowledge, questions, thoughts and opinions regarding current and future tourism in Sun Prairie. HSP also conducted market research on various tourism assets, such as hospitality, commercial real estate, meetings and conventions, entertainment, sports and recreation and multiple types of attractions in the local and regional market. Further, HSP identified and profiled various aspects of tourism in peer cities across the US to gather ideas for transformative developments and community programming that may enhance Sun Prairie’s destination appeal. Finally, HSP recommended a short list of assets and programming to prioritize for further study.

The balance of this report represents HSP’s findings.
Key Questions

- What are the strengths and weaknesses of the current tourism product in Sun Prairie?
- What is recommended to capitalize on SP’s strengths?
- What is recommended to mitigate SP’s weaknesses?
- What are the strengths and weaknesses of the current tourism promotion effort?
- What is recommended to enhance tourism promotion efforts and how would that increase tourism impact?
- What are recommended next steps?
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Executive Summary
Summary of Headlines & Recommendations
# DESTINATION DEVELOPMENT SWOT ANALYSIS

How External and Internal Factors Affect Destination Development

<table>
<thead>
<tr>
<th>INTERNAL FACTORS</th>
<th>EXTERNAL FACTORS</th>
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</thead>
<tbody>
<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>OPPORTUNITIES</strong></td>
</tr>
<tr>
<td>• Sporting &amp; Recreation Facilities</td>
<td>• Indoor/Outdoor Tournament Complex</td>
</tr>
<tr>
<td>• Interstate/Airport Access</td>
<td>• Indoor/Outdoor Entertainment Facility</td>
</tr>
<tr>
<td>• Big-Box Retail &amp; Office Node</td>
<td>• Unique Events Showcasing Sun Prairie</td>
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<tr>
<td>• Downtown (Walkable, Attractive)</td>
<td>• Larger Meeting Space</td>
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<td>• Hilton Garden Inn Event Space</td>
<td>• Piggyback off of Madison’s Draw</td>
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<td><strong>WEAKNESSES</strong></td>
<td><strong>THREATS</strong></td>
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<tr>
<td>• Website/Marketing/Storytelling</td>
<td>• Competition from Madison et al.</td>
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<td>• Limited Entertainment / Attractions</td>
<td>• Limited calendar/free-time for events</td>
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<td>• Limited Impactful Events</td>
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<tr>
<td>• Obsolete/Underperforming Assets/Events</td>
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How to Capitalize on Strengths?

- Expand Sun Prairie Ice Arena (SPIA) - Demonstrated tournament success suggests opportunity for an impactful expansion
- Renovation/Adaptive Reuse of Angell Park in Multipurpose Event/Entertainment Complex
- Leverage more interstate-oriented attractions
- Develop a unique asset that allows visitors to have a Madison-affinity experience but in SP’s easily-accessible location
- Investigate additional transportation options re: hotels and major events/attractions
- Induce additional walkable restaurant, bar, retail, microbrewery, etc. in downtown (this will differentiate your community from numerous suburban, interstate-oriented areas)
How to Mitigate Weaknesses?

- Create Independent Tourism Website and Social Media Platform
- Create Unique Sun Prairie Brand; Consider Independent Tourism Entity (CVB/DMO separate from City)
- Develop an Indoor/Outdoor Multipurpose Event Center (concerts to conferences)
- Develop an Indoor or Outdoor Tournament Sports Complex
- Revamp Sweet Corn Fest to create impactful multi-day event
- Create “linger-longer” experiences relative to Groundhog Day for impact
- Create events unique to Sun Prairie that thread the needle of the busy calendar
- Angell Park: improve aesthetics and consider as site for additional event facility investment (to be studied in future phase)
- Opportunity: Implementation of a Food & Beverage Tax
Recommended Next Steps

- Engage in a deep dive feasibility study for added sports tournament facilities
- Engage in deep dive feasibility study for an entertainment facility
- Create a signature event to focus efforts and funds on and revamp/enhance existing events. (Reinvent Corn Fest?)
  - Identify and track benchmarks for tourism metrics (event attendance, regional influence, etc)
  - Potentially attract third party event team or promotion team
- Engage in Website and Branding Restructuring Process
HSP analyzed a wide range of potential developments and major events that would bolster tourism to the Sun Prairie community. These assessments were made based off market interviews, the current local, metro, and regional supply, and the room night demand that each development would generate.

HSP believes that events/festivals and youth sports are the two areas that provide Sun Prairie with the most opportunity to induce tourism, with several others with potential.
HSP filtered the opportunity analysis matrix into four specific recommendation categories. These categories were identified as the best possible asset classes to target for new development or re-development aimed at increasing tourism to Sun Prairie. Deeper studies/action steps are recommended for each.
Economic & Demographic Analysis

Local, Metro, and Regional Markets
Regional Overview

Sun Prairie is in the southern part of the state of Wisconsin, with easy access to other areas of the state. The city of Sun Prairie is a suburb to the Madison Metropolitan Statistical Area.

Sun Prairie is located approximately 15 minutes from the Dane County Regional Airport, which has flights on all major airlines to many major cities across the Midwest and East Coast regions. From Sun Prairie, it is only a 1-hour drive to Milwaukee, a 2-hour drive to Green Bay, and a 2.5-hour drive to Chicago.
Regional Drive Times

The population is 1,207,996 within a 60-minute drive time from downtown Sun Prairie. When expanded to a 120-minute drive time, the population grows to 6,188,923, and grows to 15,592,755 within 180-minutes.

Within a 2-hour drive time from Sun Prairie there are several areas that have a significant density of people including the metropolitan Milwaukee area, and the entire downtown area of Chicago.
Sun Prairie

Sun Prairie is part of the Madison MSA and located ten miles northeast of Downtown Madison along WI 151. Sun Prairie is the fourth-largest city by population in the MSA and accounts for five percent of the MSA’s total population.

<table>
<thead>
<tr>
<th>City</th>
<th>Population</th>
<th>% of MSA</th>
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<td>Madison</td>
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<td>Janesville</td>
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<td>Monroe</td>
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<tr>
<td>Madison MSA Total</td>
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Source: ESRI
Sun Prairie Overview

Sun Prairie is a city located in Dane County in southern Wisconsin adjacent to the capital city of Madison. Sun Prairie is approximately 14 miles away from the downtown Madison area, roughly a 30-minute drive time. The fourth most populous city in the Madison MSA, Sun Prairie boasts an estimated 2020 population of 35,460 residents.

Sun Prairie is situated with great access to several highways that connect it to the rest of the state of Wisconsin and to adjacent states in the northern Midwest region.

Sun Prairie is known throughout the state of Wisconsin for having a high quality of life, top-tier school system, excellent parks and recreation, and an idyllic historic downtown.
Downtown Sun Prairie Redevelopment

- Downtown has been centered around Main and Bristol Streets since the early 1900s.
- City decided to redevelop downtown in the late 1990s and adopted a Business District Revitalization Plan in 2000.
- Dane County assisted with Phase I of the plan by providing a Better Urban Infill Development (BUILD) grant to the City, which helped develop a comprehensive plan the City then adopted in March 2001.
- City and Veridian Homes broke ground on Phase 1 in October 2003, transforming Cannery Row, an industrial site, into a mixed-use project with residential and retail and created a green space, Cannery Square.
- Redevelopment of two green spaces, City Square and Market Square followed. City Square offers 20,000 SF of ground-floor retail and restaurants and 123 apartments. Market Square is an outdoor space utilized for seasonal farmer’s markets adjacent to Public Market.
- Public Market is an indoor/outdoor farmer’s market situated in the historic Cannery Building, offering vendor stalls and indoor seating for the year-round farmer’s market.
Downtown Sun Prairie Redevelopment

- Phase II began in 2004 when the City received another BUILD grant from Dane County, which helped fund improvements to traffic flow, potential building sites, parking, wayfinding/signage and developed design guidelines for the area.

- Phase II also included the development of several dining establishments, additional residential units and pedestrian-friendly amenities and streetscape enhancements.

- Due to these improvements, downtown has grown to include many restaurants, entertainment, commercial and service businesses, government buildings; tourist attractions and residences.

- Phase III included the new 150-unit Perspectives Senior Living community, offering independent living, assisted living and memory care since opening March 2013.
Downtown Sun Prairie - Sun Prairie Looking Forward

On July 10, 2018, a natural gas leak explosion in Sun Prairie’s downtown resulted in several homes and small businesses burning down.

Within just six months of this explosion, major milestones were achieved in the recovery of downtown. The damaged buildings had been cleared and the intersection rebuilt. In response to the tragedy, more than $600,000 in relief funds were raised to support those affected by the blast.

In response to the explosion, the City engaged the Lakota Group, a design firm, to lead the Sun Prairie Stronger project, including the gathering of feedback from community members and designing potential redevelopment plans for the blast site. Ultimately, the process yielded a preferred concept plan, shown here, which includes single- and multi-family residential, retail and restaurant space and a hotel, as well as open space.

Credit: Sun Prairie Stronger Master Plan, the Lakota Group
Additional Development Prairie Lakes

- **The Shoppes at Prairie Lakes** is a 110-acre retail development located between the City of Madison and Sun Prairie at the intersection of U.S. 151 and County C Highways.

- Prairie Lakes has attracted five anchor stores. The first anchor, Target, opened in March 2009, followed by the Woodman’s Food Market in 2012 and Costco in November of the same year. Next was the 16-screen Marcus Palace Cinema, which opened on April 30, 2015, the same day as Cabela’s.

- Prairie Lakes also includes 16 restaurants and 29 other stores, including banks, insurance agencies, home goods, fitness studios and many services.

- In September 2018, **Hilton Garden Inn Madison Sun Prairie** opened as the first conference hotel property in Sun Prairie. This development was a **public/private partnership** and was a great example of public leadership leading to an impactful development.

- As of June 2020, Meijer has proposed a 200,000-SF store with 10 outlots for additional stores and restaurants. Final approval is still needed, but construction is expected to begin as early as Spring 2021 just west of the Menards.
Stakeholder Feedback

To begin this analysis process of the Sun Prairie community, HSP hosted three virtual “Kickoff” meetings with key stakeholders in the community. The stakeholder groups included local tourism officials, local business owners, local facility owners, commercial brokers, representatives from the Madison area, and many other organization groups. Key findings and discussion points from these virtual meetings are listed below:

- Sun Prairie has a great reputation around the Greater Madison area as being a welcoming city with great people, but lacks the tourism assets to consistently draw in visitors from outside the community to spend money in Sun Prairie.
- The location of Sun Prairie, near the interstate and the airport, presents tremendous opportunity.
- The Sweet Corn Festival and Groundhog Day are the two major events in the Sun Prairie community. It is critical to determine how to alter these events to create a larger impact for the community, but also preserve the history of each event. How can ancillary events like concerts, fun runs, and art shows and the extension of these events enhance their overall feel and attract overnight stays?
- Natural recreation is underutilized in the community. Patrick Marsh and Sheehan Park are tremendous outdoor areas that need to be marketed better. A possible connection of these areas to critical mass in the downtown area, such as a bike path/walking path could have opportunity.
- There is a strong opportunity in the youth sports market. The Sun Prairie area has existing sports infrastructure that could be expanded or complimented through activating streets or adding ancillary retail/restaurant. For a new build youth sports complex, available land near the interstate could be a strong location for a complex, due to the Prairie Lakes development supplying critical and the intersection of many major highways.
The Sun Prairie community is extremely diverse and this needs to be recognized through cultural events, music, and food festivals. This diversity is something that the community is proud of.

The Downtown Sun Prairie Area has a historic, small town feel, but has experienced new development recently, such as new retail options and residential units. A connection of the downtown area to a potential new development or existing tourism attraction would greatly benefit the downtown. The Farmers Market is currently conducted in the downtown area and flows well. A festival street or open-alcohol area would help enhance the downtown area and bring locals out and visitors from other cities.

The Sun Prairie events market is extremely limited for corporate meetings and there are a few wedding/group venues that can host up to 300 guests. Angell Park is the biggest weddings/events facility and can host up to 400 people.

The strong press and overall positive attitude towards the Ashley Field development should be captured. The development could be enhanced by having ancillary retail nearby or a connection (festival street) to the downtown area.

The entertainment market, for all ages, is lacking in the community. A concert venue or children’s museum downtown could be beneficial for locals and attract additional visitors from the MSA.

While Madison steers a lot of tourism away from Sun Prairie, a partnership with Madison would be in the best interest for the Sun Prairie community.
Demographic Analysis
How do Economic, Demographic and Tourism Impact Various Project Types?

Every element of a community has some impact, either directly or indirectly, on the potential for a new destination asset.

- **Sports** facilities rely on accessibility to major population areas with strong incomes, as tend to locate in suburban areas, where land is plentiful and less expensive for the vast acreage needed for facilities and parking.

- **Entertainment facilities** typically rely on a large local and regional population (depending on size and nature of facility) and the spending power thereof. Demographics of residents (age, spending behaviors, etc.) will also affect the programming and potential success on an entertainment facility.

- **Events** rely on the spending power and size of the relevant market area, which starts with the local community. Events can range from free and short-duration to expensive and multi-day affairs. Demographics also can drive event types. For example, if an area is known for a certain type of history or culture or identity, this can often figure into event themes.

- **Retail/Restaurant** is highly influenced by the median household income (HHI) and, therefore, employment in an area. There is also an important relationship between the cost of living in an area (housing, etc.) and median HHI as it points to what level of discretionary income is available for residents to spend on dining and non-essential retail goods.

- **Meeting facilities** have a similar relationship to an area as hotels, though the local population is more likely to utilize meeting space than to stay in a hotel, so the presence of local associations and corporations will drive some demand to meeting facilities. Local companies and universities will also drive events. Proximity to major attractions, roads and airports will help meeting facilities.

- **Hotels** rely heavily on tourism (leisure) and corporate visitation to a given area in order to fill rooms throughout the week. Typically, the presence of more and larger corporations in an area will drive weekday occupancy and leisure travelers will be more common during the weekends, though some overlap is to be expected. A more robust local economy helps support group business in hotels.
The population of Sun Prairie has increased immensely in recent years. Since 2010, the population of the city of Sun Prairie has increased 21.1%, while Dane County increased 14.3% and the Madison MSA increased 12.0%. All of these figures are well above the national average of 8.1%, showing that people are migrating to the area due to its quality of life, its affordability and its attractions.
Sun Prairie outperforms the state and country averages in several of the above income, spending, and other demographic data categories. This confirms the strength of the Sun Prairie market and the desirability people have to live in the area. It is important to note that the median household income is well above that of the state of Wisconsin and the U.S.
Median Household Income

As noted, in Sun Prairie the median household income is $70,295. When compared to the surrounding census tracts in the area, it is observed that the surrounding suburbs of Madison are quite affluent with a population that earns above the state and country averages.
Dane County has a diverse employment base that spans several different industries. The top five industries in the country are as follows: government and government enterprises, health care and social assistance, retail trade, professional, scientific, and technical services, and accommodation and food services.

Government makes up nearly 19% of the employment base in Dane County, with nearly 6% attributed to the local government and just over 11% attributed to the state government.
Major Employers

The top three employers in Sun Prairie are Sun Prairie Schools, Colony Brands and QBE Insurance. Due to the fact that Sun Prairie is a suburb to Madison, commonly residents will commute into the greater metropolitan area for work. Despite this, these three top employers make up nearly 2,500 jobs for the city of Sun Prairie.

### Sun Prairie Major Employers - 2018

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Industry</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Prairie Schools</td>
<td>Education</td>
<td>1,501</td>
</tr>
<tr>
<td>Colony Brands</td>
<td>Consumer Services</td>
<td>505</td>
</tr>
<tr>
<td>QBE Insurance</td>
<td>Insurance</td>
<td>450</td>
</tr>
<tr>
<td>Prairie Athletic Club</td>
<td>Gym &amp; Athletics</td>
<td>330</td>
</tr>
<tr>
<td>Wisconsin Distributors</td>
<td>Distribution</td>
<td>310</td>
</tr>
<tr>
<td>Royale Printing</td>
<td>Commercial Services</td>
<td>274</td>
</tr>
<tr>
<td>Continental ContiTech</td>
<td>Manufacturing &amp; Development</td>
<td>264</td>
</tr>
<tr>
<td>Frontier</td>
<td>Telecommunications</td>
<td>250</td>
</tr>
<tr>
<td>Walmart</td>
<td>Retail</td>
<td>250</td>
</tr>
<tr>
<td>Village Health</td>
<td>Healthcare</td>
<td>243</td>
</tr>
<tr>
<td>Woodman's Food Market</td>
<td>Retail &amp; Grocery</td>
<td>226</td>
</tr>
<tr>
<td>City of Sun Prairie</td>
<td>Government</td>
<td>212</td>
</tr>
</tbody>
</table>

Source: City of Sun Prairie
Although unemployment in the state, county, and city of Sun Prairie has recently tracked that of the entire U.S., it has consistently remained below national averages.

This has stayed true during the current COVID-19 pandemic where these areas have been more resistant to drastic increases in unemployment rates.
Education

The major colleges and universities in the greater Sun Prairie area are for a majority all located in the Madison area, the largest being the University of Wisconsin-Madison with a total enrollment of 44,257 students.

The educational attainment data among the population in Dane County and Sun Prairie shows that the area is highly educated, which aligns with the high median household incomes in the area.
Sun Prairie Tapestry Segmentation

HSP performed a tapestry segmentation analysis which classifies neighborhoods using 67 unique segments based not only on demographics but also socioeconomic characteristics.

The top five segments for Sun Prairie are Bright Young Professionals, Soccer Moms, Up and Coming Families, Parks and Rec, and Green Acres. The top three segments are profiled in more detail on the following slides.

Understanding the segmentation profile of the Sun Prairie market helps to determine the potential projects that would be most impactful with these demographic groups.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Segment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bright Young Professionals</td>
<td>34.1%</td>
</tr>
<tr>
<td>2</td>
<td>Soccer Moms</td>
<td>27.6%</td>
</tr>
<tr>
<td>3</td>
<td>Up and Coming Families</td>
<td>13.4%</td>
</tr>
<tr>
<td>4</td>
<td>Parks and Rec</td>
<td>8.5%</td>
</tr>
<tr>
<td>5</td>
<td>Green Acres</td>
<td>8.2%</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>91.8%</strong></td>
</tr>
</tbody>
</table>

Source: ESRI
WHO ARE WE?
Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes, over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

OUR NEIGHBORHOOD
- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multifamily buildings or row housing make up 56% of the housing stock (row housing (Index 178), buildings with 5–19 units (Index 275)); 43% built 1980–99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

SOCIOECONOMIC TRAITS
- Education completed: 35% with some college or an associate's degree, 33% with a bachelor’s degree or higher.
- Unemployment rate is lower at 4.7%, and labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.
Soccer Moms make up 28% of the Sun Prairie market.

Sun Prairie is a suburban area which makes the city a great place for families.

Family oriented entertainment spaces such as sports complexes, parks and recreation, and retail and shopping are important to this group.
WHO ARE WE?

Up and Coming Families is a market in transition—residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead, and willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country.

OUR NEIGHBORHOOD

- New suburban periphery: new families in new housing subdivisions.
- Building began in the housing boom of the 2000s and continues in this fast-growing market.
- Single-family homes with a median value of $194,400 and a lower vacancy rate.
- The price of affordable housing: longer commute times (Index 217).

SOCIOECONOMIC TRAITS

- Education: 67% have some college education or degree(s).
- Hard-working labor force with a participation rate of 71% (Index 114) and low unemployment at 4.6% (Index 84).
- Most households (61%) have 2 or more workers.
- Careful shoppers, aware of prices, willing to shop around for the best deals and open to influence by others’ opinions.
- Seek the latest and best in technology.
- Young families still feathering the nest and establishing their style.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

Up and Coming Families make up 13% of the Sun Prairie market.

Aging younger demographics from urban areas typically migrate to suburban areas to begin families and establish themselves in communities with high performing schools and plentiful recreation for their children.
Madison, WI Tapestry Segmentation

HSP performed a tapestry segmentation profile analysis for the city of Madison, Wisconsin to compare its demographic profile with that of Sun Prairie.

The top five segments for the city of Madison are Emerald City, Metro Renters, Dorms to Diplomas, Enterprising Professionals, and In Style. The top three segments are detailed on the following slides.

Comparing the percentages with that of Sun Prairie shows that the Madison market is much younger, more diversified than that of Sun Prairie, with their top five categories yielding a cumulative percentage of only 54%.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Segment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Emerald City</td>
<td>15.4%</td>
</tr>
<tr>
<td>2</td>
<td>Metro Renters</td>
<td>12.2%</td>
</tr>
<tr>
<td>3</td>
<td>Dorms to Diplomas</td>
<td>11.5%</td>
</tr>
<tr>
<td>4</td>
<td>Enterprising Professionals</td>
<td>7.8%</td>
</tr>
<tr>
<td>5</td>
<td>In Style</td>
<td>7.8%</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>54.7%</strong></td>
</tr>
</tbody>
</table>

Source: ESRI
WHO ARE WE?
Emerald City’s denizens live in lower-density neighborhoods of urban areas throughout the country. Young and mobile, they are more likely to rent. Well educated and well employed, half have a college degree and a professional occupation. Incomes close to the US median come primarily from wages, investments, and self-employment. This group is highly connected, using the Internet for entertainment and making environmentally friendly purchases. Long hours on the Internet are balanced with time at the gym. Many embrace the “foodie” culture and enjoy cooking adventurous meals using local and organic foods. Music and art are major sources of enjoyment. They travel frequently, both abroad and domestically.

OUR NEIGHBORHOOD
- There are mostly older, established neighborhoods with homes built before 1960, around 30% built before 1940.
- Just over half of all homes are renter occupied.
- Single-person and nonfamily types make up over half of all households.
- Median home value and average rent are slightly above the US levels; around half of owned homes are worth $150,000–$300,000.

SOCIOECONOMIC TRAITS
- Well educated, these consumers research products carefully before making purchases.
- They buy natural, green, and environmentally friendly products.
- Very conscious of nutrition, they regularly buy and eat organic foods.
- Cell phones and text messaging are a huge part of everyday life.
- They place importance on learning new things to keep life fresh and variable.
- They are interested in the fine arts and especially enjoy listening to music.

Emerald City makes up 15% of the Madison market.

This demographic is comprised of young professionals who live, typically rent, in metro areas who have yet to establish their family.

Entertainment commonly consists of the internet, art, and music as well as urban attractions.
Metro Renters make up 12% of the Madison market.

Commonly in their 20’s and 30’s, this market is educated and works a professional job. These people typically rent and either have one roommate or live alone.
Dorms to Diplomas makes up 12% of the Madison market.

Due to the University of Wisconsin-Madison, there are many university students in the Madison metro area.

This demographic commonly stays on campus, with much of their time being spent involved in campus life.

WHO ARE WE?
On their own for the first time, Dorms to Diplomas residents are just learning about finance and cooking. Frozen dinners and fast food are common options. Shopping trips are sporadic, and preferences for products are still being established. Many carry a balance on their credit card so they can buy what they want now. Although school and part-time work take up many hours of the day, the remainder is usually filled with socializing and having fun with friends. They are looking to learn life lessons inside and outside of the classroom. This is the first online generation, having had lifelong use of computers, the Internet, cell phones, and MP3 players.

OUR NEIGHBORHOOD
- Mix of dorms, on-campus and off-campus housing cater to young renters.
- Off-campus householders are commonly students living alone or with roommates; average household size is 2.22.
- More than 80% of the housing are apartments; many older homes in town have been converted into multifamily living units.
- With limited parking on campus, many walk, bike, or car pool to class.
- Less than one in ten homes are owner occupied.

SOCIOECONOMIC TRAITS
- They’re the youngest market with half of the population aged 20–24.
- They’re impulse buyers who experiment with different brands.
- They buy trendy clothes on a budget.
- Vehicles are just a means of transportation—economy and environmental impact are factors in purchases; used, imported subcompact cars are a popular choice.
- They value socializing, having fun, and learning new things.
- They’re always connected; their cell phone is never out of reach.
Diversity

Diversity can have a strong impact on growing communities by enhancing the quality of life of an area and potentially driving tourism to that area. HSP examined the racial composition of the Sun Prairie community, according to the American Community Survey, to better understand how diverse Sun Prairie is and how the community can use this as a strength.

While the Sun Prairie population is majority made up of white residents, there is a significant diverse population that should be recognized. This diversity should be promoted through Sun Prairie's marketing channels, through the creation of major events, and at major attractions around the community.

### Sun Prairie Population Composition

<table>
<thead>
<tr>
<th>Racial Composition</th>
<th>Percent of Sun Prairie population</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>80.3%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>8.9%</td>
</tr>
<tr>
<td>Asian</td>
<td>5.9%</td>
</tr>
<tr>
<td>Two or more races</td>
<td>3.2%</td>
</tr>
<tr>
<td>Other race</td>
<td>1.2%</td>
</tr>
<tr>
<td>Native American</td>
<td>0.4%</td>
</tr>
<tr>
<td>Native Hawaiian or Pacific Islander</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

Source: American Community Survey
Economic & Demographic Implications

• The Madison area, including the surrounding suburbs, has very strong demographics, in terms of education and wealth. The City of Madison is a major university town that acts as a hub for education and activity for Dane County.

• The location of Sun Prairie presents a tremendous opportunity to attract visitation from not only the Madison area, but also potentially from northern Wisconsin, the Chicago suburbs, the Milwaukee suburbs, and cities in Iowa and Minnesota. The interstate access that Sun Prairie has will be a major factor in driving tourism to the area to attend a festival or visit an attraction.

• Sun Prairie has been growing rapidly since the early 2000s. The community has a strong reputation as a bedroom community which is driven, in part, by the strong school systems.

• Sun Prairie has become more diverse over the last several years. This diversity should be celebrated with cultural events and attractions.
Tourism Analysis & Event Assessment

Local, Metro, and Regional Market Inventory
Tourism Assessment Overview

HSP performed an inventory of all current assets and events in Sun Prairie to determine what currently exists to attract tourism and to identify any gaps in offerings. In addition, HSP assessed which events and development priorities Sun Prairie could use to attract additional visitation and improve the quality of live for its residents. In order to fully understand the market, HSP assessed:

- Entertainment Venues and Cultural Assets
- Attractions and Events
- Sports and Recreation
- Meetings and Hotels
- Retail and Restaurants

The following chapter provides an outline of this supply, as well as a summary of demand to help determine what might be possible in the future.
Most Visited Places

HSP, with visitation data from Placer.ai, analyzed the top visited places, in terms of distinct individuals, in Sun Prairie between 2017 and 2019. Distinct individuals are defined as individuals who visited one of these places in Sun Prairie at least once, but not more than once. HSP analyzed this data to better understand what places are currently driving visitation and spending in the Sun Prairie area.

This list highlights how impactful the Prairie Lakes Shopping Center is for the Sun Prairie area. However, the shopping center, like many other places on this list, does not induce a significant amount of overnight stays for Sun Prairie. This highlights the need for a major attraction in Sun Prairie that will generate overnight stays.

<table>
<thead>
<tr>
<th>Name</th>
<th>Category</th>
<th>Sub-Category</th>
<th>Number of Distinct Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prairie Lakes Shopping Center</td>
<td>Shopping Centers</td>
<td>Shopping Center</td>
<td>1,260,000</td>
</tr>
<tr>
<td>Sun Prairie High School</td>
<td>Other</td>
<td>High School</td>
<td>223,200</td>
</tr>
<tr>
<td>Walmart Supercenter</td>
<td>Superstores</td>
<td>Big Box Store</td>
<td>190,566</td>
</tr>
<tr>
<td>Menards</td>
<td>Home Improvement</td>
<td>Hardware Store</td>
<td>137,004</td>
</tr>
<tr>
<td>Nitty Gritty</td>
<td>Leisure</td>
<td>Bar</td>
<td>83,050</td>
</tr>
<tr>
<td>Sun Prairie Ice Arena</td>
<td>Leisure</td>
<td>Ice Arena</td>
<td>82,500</td>
</tr>
<tr>
<td>SONIC Drive In</td>
<td>Dining</td>
<td>Fast Food Restaurant</td>
<td>60,610</td>
</tr>
<tr>
<td>Market Street Diner</td>
<td>Dining</td>
<td>Diner</td>
<td>60,528</td>
</tr>
<tr>
<td>Culver's</td>
<td>Dining</td>
<td>Fast Food Restaurant</td>
<td>60,301</td>
</tr>
<tr>
<td>Pick 'n Save</td>
<td>Groceries</td>
<td>Grocery Store</td>
<td>58,698</td>
</tr>
<tr>
<td>Cannery Square</td>
<td>Shopping Centers</td>
<td>Shopping Center</td>
<td>55,124</td>
</tr>
<tr>
<td>Buck &amp; Honey's</td>
<td>Dining</td>
<td>American Restaurant</td>
<td>54,953</td>
</tr>
<tr>
<td>Prairie Athletic Club</td>
<td>Fitness</td>
<td>Gym</td>
<td>48,695</td>
</tr>
<tr>
<td>Sheehan Park</td>
<td>Other</td>
<td>Athletic Fields and Parkland</td>
<td>45,100</td>
</tr>
<tr>
<td>Prairie Square</td>
<td>Shopping Centers</td>
<td>Shopping Center</td>
<td>41,065</td>
</tr>
<tr>
<td>SSM Dean Health-Tower Drive</td>
<td>Medical &amp; Health</td>
<td>Doctor's Office</td>
<td>38,720</td>
</tr>
<tr>
<td>Pick 'n Save</td>
<td>Groceries</td>
<td>Grocery Store</td>
<td>36,598</td>
</tr>
<tr>
<td>Angell Park Race Track</td>
<td>Leisure</td>
<td>Racetrack</td>
<td>20,067</td>
</tr>
<tr>
<td>Doll Eyes Sun Prairie</td>
<td>Spa &amp; Beauty</td>
<td>Nail Salon</td>
<td>15,184</td>
</tr>
<tr>
<td>The GIRL Barber Sun Prairie</td>
<td>Spa &amp; Beauty</td>
<td>Salon / Barbershop</td>
<td>14,588</td>
</tr>
<tr>
<td>Sun Prairie Family Aquatic Center</td>
<td>Leisure</td>
<td>Water Park</td>
<td>13,300</td>
</tr>
</tbody>
</table>

Source: Placer.ai - based on estimated counted foot traffic
Entertainment Venues and Attractions
Entertainment & Attractions

Though Sun Prairie is home to several cultural organizations and hosts a number of events, the city lacks a purpose-built entertainment venue such as a theater, concert hall or flexible event center. Community groups that are performance-oriented are accommodated by the academic supply of theater venues at Sun Prairie High School and Cardinal Heights Upper Middle School Auditorium.

For ticketed entertainment, residents and visitors are currently served by the Madison market, which offers multiple venues of various sizes and types. The venues in Madison are much larger than anything Sun Prairie would likely develop in the future. Sun Prairie may not be able to compete for the types of programming and acts that Madison is able to accommodate. However, there is still an opportunity for Sun Prairie to enhance its entertainment offerings. Key statistics like average ticket price and attendance can give insight into the consumer behaviors of visitors to the area.

The following slides profile what Sun Prairie currently has, as well as a high-level overview of the competitive market created by Madison’s supply.
Local Entertainment & Attractions

The adjacent table details the existing Sun Prairie assets that are considered entertainment destinations and attractions.

Most of the destinations are a range of cultural facilities and outdoor public spaces. Sun Prairie is specifically lacking in a purpose-built entertainment venue for tickets events or concerts. The only venues that currently accommodate performing arts at the Sun Prairie Performing Arts Center, which is part of the high school, and Cardinal Heights Upper Middle School Auditorium.

The following slides profile the most compelling attractions from the list.

Sun Prairie Entertainment and Attractions

<table>
<thead>
<tr>
<th>Venue Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Prairie Performing Arts Center</td>
<td>Theater</td>
</tr>
<tr>
<td>Cardinal Heights Upper Middle School Auditorium</td>
<td>Theater</td>
</tr>
<tr>
<td>Angell Park Pavilion and Speedway</td>
<td>Racetrack</td>
</tr>
<tr>
<td>Sheehan Park</td>
<td>Park</td>
</tr>
<tr>
<td>Ashley Field</td>
<td>Park</td>
</tr>
<tr>
<td>Sun Prairie Dream Park</td>
<td>Park</td>
</tr>
<tr>
<td>Patrick Marsh Nature Preserve</td>
<td>Park</td>
</tr>
<tr>
<td>Sun Prairie Aquatic Center</td>
<td>Aquatics</td>
</tr>
<tr>
<td>Sun Prairie Historical Library &amp; Museum</td>
<td>Cultural</td>
</tr>
<tr>
<td>Marcus Palace Cinema</td>
<td>Theater</td>
</tr>
<tr>
<td>Prairie Lakes Shopping Area</td>
<td>Shopping</td>
</tr>
</tbody>
</table>

Source: City of Sun Prairie
**Angell Park Speedway**

**Capacity:** 400 seats

Angell Park Speedway is a 1/3-mile clay oval track that hosts auto racing events. The track is owned and operated by the Sun Prairie Volunteer Fire Company. In its 61st year of operations, the track continues to host exciting events throughout the warmer months with premier events every Sunday. Drivers from across the country and even the globe come to Sun Prairie to race this track. Some famous drivers, including Tony Stewart and Jeff Gordon, raced in their early days at this track.

The track continues to draw racing enthusiasts from the surrounding areas. The track includes a pavilion that can be rented out by larger groups for parties and events.

It is critical to note that the grounds at Angell Park have been used as a location for outdoor sporting events in the past. Specifically, cyclocross events have been held here in recent years.
Angell Park Speedway is in Sun Prairie and is a dirt racetrack that hosts midget racing. HSP interviewed management of Angell Park to better understand the demand for events and recreation in the area and how a new development could benefit Angell Park and the overall area. Key findings from this interview are listed below:

- Angell Park is owned by a non-profit organization and the Park hosts Sun Prairie’s annual Sweet Corn Festival. Along with hosting the Sweet Corn Festival, Angell Park hosts 10-12 midget races per year, dance recitals, day camps, and other one-off events.

- The indoor space at Angell Park is slightly dated, but hosts events such as weddings, cultural events, and fundraising events. A renovation to the indoor space, especially the basement, would be of major benefit to the Park.

- Majority of the 40 events that Angell Park hosted in 2019 were attended or hosted by out of town visitors. These events contributed roughly 20 to 30 room nights, on average, per event to the Sun Prairie community.

- The 10 to 12 annual midget racing events, that are held annually, each see between 800 to 2,000 attendees per event.

- Angell Park would like to see more quality lodging in the Sun Prairie community, so their event groups don’t have to bus to Madison hotels.
Angell Park Recommendations

HSP HAS IDENTIFIED THE FOLLOWING PRIORITIES:

ADDITIONAL TICKETED EVENTS
Angell Park has the potential to be used as an entertainment venue that would be more appropriate for ticketed live acts and events than the academic facilities. This would require coordination with current management.

SYNERGISTIC EVENTS WITH MIDGET RACING
The Midget Racing at Angell Park has a sizable following and the tradition is popular throughout the Midwest. Partnering with Angell Park in order to produce a larger festival or event related to midget racing and its history could draw a regional crowd to Sun Prairie.

RENOVATE THE INDOOR EVENT SPACE
The indoor space at Angell Park is slightly dated, but hosts events such as weddings, cultural events, and fundraising events. A renovation to the indoor space, especially the basement, would be of major benefit to the Park.
Sheehan Park

Sheehan Park is the largest park owned by the City of Sun Prairie. It consists of nearly 140 acres and comprises over 34% of the total parkland under City ownership. The park provides opportunities for outdoor activities such as picnicking, baseball, softball, basketball, hiking, and events. In winter, Sheehan Park provides a sledding hill and cross-country skiing trails, which were not available in the community prior to the development of the park.

Recently, the City of Sun Prairie presented the Sheehan Park Master Plan, $48 million worth of improvements that are planned in phases over the next 50 years. Phases 1 and 3 of the plan include the pool improvements, a recreation center on land where the Sun Prairie Community Garden is located, and a relocated Sun Prairie Community Garden.
HSP interviewed representatives from Sun Prairie about Sheehan Park in various capacities, including as an event and destination locale. Key findings from these interview are listed below:

- Sheehan Park currently hosts the Taste of the Arts festival and hosted last year’s first annual Multicultural Festival.

- The master plan calls for a renovation of the existing shelter into a group pavilion. An outdoor kitchen will be added along with more parking, an event plaza and two small group pavilions. These renovations should be prioritized as they would add value to Sheehan Park as a potential destination for visitors to ticketed events.

- The aquatics center will also receive a renovation per the Master Plan, which would include a splash pad and private cabanas. This renovation should not only be considered as a quality of life improvement, but as an opportunity to create a facility that could attract visitors from outside of Sun Prairie.

- The Sheehan Park mountain bike trails are another asset of value at Sheehan Park. The trails are utilized for a number of mountain biking and cycling events, and in the off-seasons as cross-country ski paths. Sun Prairie could leverage these trails to host biking events and provide other synergistic programming to attract cyclists from the region.
Sheehan Park Recommendations

HSP HAS IDENTIFIED THE FOLLOWING PRIORITIES:

PRIORITIZE COMPELLING PHASES OF MASTER PLAN
The 50-year master plan outlines several improvements to Sheehan Park and will improve its viability as a destination. Projects that have the potential to draw regional visitation should be prioritized.

CONTINUE AND EXPAND THE MULTICULTURAL FESTIVAL
Multicultural festivals present opportunities to involve a range of local cultural groups and organizations to provide a stronger sense of community. The most successful multicultural festivals are inclusive in not only their programming but in the planning process, to ensure a safe and celebratory environment. Sheehan Park hosted Sun Prairie’s first annual festival in 2019, and though the 2020 event was cancelled for COVID-19, it was anticipated to continue. HSP recommends that this event be produced when possible, and that the City invest in the opportunity to celebrate and leverage its local diversity.
Sun Prairie Performing Arts Center

The Sun Prairie Performing Arts Center is a 1,044-seat traditional proscenium-style performing arts center, built in 2010 by the Sun Prairie Area School District as part of the new Sun Prairie High School. The PAC hosts all school music and drama functions throughout the year, as well as numerous community events and outside rentals. Located in Sun Prairie, it is a quick 10 minutes away from Madison, 70 minutes from Milwaukee, two hours from Chicago and four hours from Minneapolis/St. Paul.

The space features state-of-the-art lighting, scene shop, dressing rooms, orchestra pit, box office, and lobby – all in an acoustically designed space. The 2,400-square foot stage features a 23-line fly system with a full fly loft, orchestra pit with cover, and trap door. For music concerts, the Performing Arts Center has a custom-made Wenger Diva acoustical shell system.

In the remaining phase of this study, HSP will conduct interviews with management to determine this venue’s potential for hosting additional events.
As mentioned, Sun Prairie is lacking in a purpose-built entertainment or event facility. Neighboring Madison is currently accommodating the regional entertainment market, though there is opportunity for Sun Prairie to develop a small facility for local and regional acts and events.

The adjacent table shows the primary entertainment venues in Madison. As shown, the city is capable of hosting all sizes of performances, from an intimate crowd of just over 1,000 to an arena style concert.

### Madison Entertainment Venues

<table>
<thead>
<tr>
<th>Venue Name</th>
<th>Capacity</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kohl Center</td>
<td>17,140</td>
<td>Arena</td>
</tr>
<tr>
<td>Veterans Memorial Coliseum</td>
<td>10,231</td>
<td>Arena</td>
</tr>
<tr>
<td>Breese Stevens Field</td>
<td>9,300</td>
<td>Stadium</td>
</tr>
<tr>
<td>The Sylvee*</td>
<td>2,500</td>
<td>Theater</td>
</tr>
<tr>
<td>Overture Hall</td>
<td>2,450</td>
<td>Theater</td>
</tr>
<tr>
<td>Orpheum Theater</td>
<td>1,830</td>
<td>Theater</td>
</tr>
<tr>
<td>Capitol Theater</td>
<td>1,282</td>
<td>Theater</td>
</tr>
<tr>
<td>Wisconsin Union Theater</td>
<td>1,100</td>
<td>Theater</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>5,193</td>
<td>–</td>
</tr>
</tbody>
</table>

Source: Pollstar, Hunden Strategic Partners
Madison Entertainment Venues

The Kohl Center is an arena and athletic center at the University of Wisconsin–Madison. The building, which opened in 1998, is the home of the university’s men’s basketball and ice hockey teams, and the women’s basketball team. In off-season, the venue is also used for concerts and events. The maximum capacity for the arena is 17,140.

The Veterans Memorial Coliseum is part of the Alliant Energy Center, a multi-building complex in Madison. The venue has 10,000 seats and is used for concerts and other events. The AEC welcomes more than one million people attending more than 500 events annually, ranging from local meetings and banquets to large sporting events and major concerts.

Breese Stevens Municipal Athletic Field is a multi-purpose stadium in Madison. The venue currently seats nearly 5,000, which can be expanded to 9,333 for concerts. The field has also hosted ice skating, boxing, wrestling, track and field, midget car racing, rodeos, circuses, drum and bugle corps competitions, concerts, and fraternal and religious gatherings.
Overture Center for the Arts is a state of the art performing arts center and art gallery in Madison. The center opened on September 19, 2004, replacing the former Civic Center. The 2251-seat Overture Hall is the facility's largest theater. User groups include the Madison Symphony Orchestra, Madison Opera, and Madison Ballet. In addition, this venue occasionally hosts nationally recognized touring acts.

The Orpheum Theatre is a live performance and musical theater in downtown Madison, located one block from the Wisconsin State Capitol. The venue is operated by Live Nation and can accommodate 1,697 people for concerts and family shows.

The Sylvee is a live music venue in downtown Madison that opened in 2018. In addition to weekly concerts, the venue is available for rent for private events and weddings. The Sylvee has a maximum capacity of 2,500 attendees.
HSP interviewed representatives from Destination Madison and considered Madison’s supply of entertainment venues as it relates to Sun Prairie. As an entertainment and event venue is one of the recommendations for Sun Prairie, it is essential to consider their supply of facilities. Key findings from these interviews and research are listed below:

- Madison is capable of hosting all sizes of performances, from an intimate crowd of just over 1,000 to an arena style concert.
- A recently completed master plan recommending the renovation and expansion of the Alliant Energy Center Campus will elevate Madison’s appeal as an event and meetings destination, which could prove positive for Sun Prairie. Though the plan is currently under reconsideration due to COVID-19, the master plan aims to create a walkable, environmentally-friendly destination with meeting space, hotels, restaurants and entertainment venues.
- In addition to the indoor entertainment venues listed, Madison uses its public spaces and natural assets to host a number of popular outdoor events and festivals throughout the year. These include Taste of Madison, the Yum Yum Fest, Sugar Maple Music Festival, Make Music Madison, Brat Fest, and Mad Gael Music Fest.

Sun Prairie has followed suit and has begun building momentum for outdoor events and festivals of their own. The following section profiles the most relevant events in Sun Prairie and provides recommendations for their optimization.
Festivals and Events
Festivals and Events

Though lacking in physical entertainment venues, Sun Prairie hosts several festivals and events that draw visitors to the area or that have the potential to do so with some additional resources or planning.

Events will be an area of particular focus for Sun Prairie’s tourism readiness. Annual events that grow into recognizable, multi-day festivals that generate overnight stay and economic impact are a component that can be integrated into Sun Prairie’s tourism development strategy and visitor journey.

The following slides profile the current Sun Prairie attractions and events supply. A high-level overview of events that are occurring across the country that could provide Sun Prairie inspiration for the future are also included.
Local Events

The adjacent table profiles the annual festivals and events in Sun Prairie along with the time of year they are held.

The highlighted items represent the major events in the Sun Prairie community that are drawing visitation from outside of Sun Prairie.

Sun Prairie Annual Events

<table>
<thead>
<tr>
<th>Name</th>
<th>Month</th>
<th>Produced By</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Prairie Sweet Corn Festival</td>
<td>August</td>
<td>Chamber of Commerce</td>
<td>Angell Park</td>
</tr>
<tr>
<td>Taste of the Arts Fair</td>
<td>June</td>
<td>Chamber of Commerce</td>
<td>Sheehan Park</td>
</tr>
<tr>
<td>Groundhog Day &amp; Fun Run</td>
<td>February</td>
<td>City of Sun Prairie</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Holiday Tree Lighting &amp; Parade</td>
<td>December</td>
<td>City of Sun Prairie</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Downtown Fall Festival</td>
<td>October</td>
<td>City of Sun Prairie</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Downtown Farmer's Market</td>
<td>May - October</td>
<td>City of Sun Prairie</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Movies &amp; Concerts in the Park</td>
<td>May - October</td>
<td>City of Sun Prairie</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Angell Park Speedway Midget Racing</td>
<td>May - October</td>
<td>Sun Prairie Fire Department</td>
<td>Angell Park</td>
</tr>
<tr>
<td>Mounds Dog Fest</td>
<td>June</td>
<td>Mounds Pet Food</td>
<td>Angell Park</td>
</tr>
<tr>
<td>Strawberry Fest</td>
<td>June</td>
<td>Lion's Club</td>
<td>Colonial Club</td>
</tr>
<tr>
<td>Flags of Freedom Parade &amp; Field Show</td>
<td>July</td>
<td>Sun Prairie Band Boosters</td>
<td>Cannary Square</td>
</tr>
<tr>
<td>Taste of Sun Prairie</td>
<td>July</td>
<td>Lion's Club</td>
<td>Cannary Square</td>
</tr>
</tbody>
</table>

Source: Pollstar, Hunden Strategic Partners
Local Events

The adjacent figure highlights the four public spaces and parks that frequently host Sun Prairie’s community events and festivals.

The most common venues include Angell Park, Sheehan Park, and Cannery Square. This graphic helps to detail the major visitation areas within the Sun Prairie community.
The Sun Prairie Sweet Corn Festival is one of Sun Prairie’s primary annual events. The four-day festival typically kicks off on a Thursday with a parade down Main Street. Events and festivities continue throughout the weekend with sweet corn served on Saturday and Sunday. Other attractions include a family-friendly carnival, food and product vendors, a family entertainment stage, animal tent, helicopter rides, quad power jump, paintless paint ball, a craft fair, and live bands.

The event, organized by the Sun Prairie Chamber of Commerce to benefit several local no-profit organizations, was moved to a virtual platform for 2020 due to COVID-19 precautions.
Visitation

HSP analyzed data, from Placer.ai, to better understand the visitation that the Sweet Corn Festival generates every year.

The festival is attended well by the local population, but is lacking the ability to draw visitors from over 75 miles away.
Local/Metro Visitation

Roughly 85% of visitation comes from attendees that live within 25 miles of Angell Park.

Estimated Visitation to Sweet Corn Festival 2019

<table>
<thead>
<tr>
<th>Visitor Origin Distance from Angell Park</th>
<th>Total Foot Traffic from this Distance</th>
<th>Percent of Total Foot Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL visits</td>
<td>46,400</td>
<td>–</td>
</tr>
<tr>
<td>25+ miles</td>
<td>7,800</td>
<td>16.8%</td>
</tr>
<tr>
<td>75+ miles</td>
<td>3,500</td>
<td>7.5%</td>
</tr>
</tbody>
</table>

Source: Placer.ai
Regional Visitation

The Sweet Corn Festival attracts a large sum of attendees year over year. However, majority of these visitors come from within the Sun Prairie metro. The event generates under 500 overnight stays, on average. This further emphasizes the need to enhance the event or package the event to generate more overnight stays for Sun Prairie.

*Roughly 6% of Sweet Corn Festival attendees come from more than 100 miles away from Sun Prairie.*
Visitor HHI (2017 - 2019)

It is critical to understand the household incomes of the annual visitors to the Sweet Corn Festival to identify the “typical visitor” and highlight visitor groups that the event might not be capturing.

Since 2017, average visitor household incomes have ranged from $25,000 to $200,000 per year. However, a majority of the visitors’ average household income ranges from $50,000 to $100,000 per year.

<table>
<thead>
<tr>
<th>Sweet Corn Fest - 2017 - Average Visitor Household Income</th>
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</thead>
<tbody>
<tr>
<td>Household Income</td>
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<tr>
<td>------------------</td>
</tr>
<tr>
<td>&lt;10K</td>
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<tr>
<td>10K - 15K</td>
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<td>15K - 20K</td>
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<td>75K - 100K</td>
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<td>100K - 125K</td>
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<tr>
<td>125K - 150K</td>
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<tr>
<td>150K - 200K</td>
</tr>
<tr>
<td>&gt;200K</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td>Source: Placer.ai</td>
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<td>Source: Placer.ai</td>
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<tr>
<td>Source: Placer.ai</td>
</tr>
</tbody>
</table>
Headlines: Sweet Corn Festival

The Sweet Corn Festival is a Chamber-owned event that has occurred in Sun Prairie for the last 74 years. HSP interviewed representatives from the Chamber and key stakeholders to better understand the demand for this event and opportunities for expansion or improvement. Key findings from this interview are listed below:

- The strategic planning committee is reviewing this event to determine if the event will still be owned by the Chamber. The revenue currently goes to support the participating non-profit organizations, including the Knights of Columbus, VFW, and Lions Club.
- The event started small but has grown steadily and now brings more than 40,000 visitors to Sun Prairie who consume more than 80 tons of corn.
- The event has had problems in the past with rowdiness, which resulted in early closure of the event on two of the weekend nights last year. Efforts have been made to ensure the event remains family-oriented, and there is consideration for removing the carnival portion of the event.
- The Chamber does not currently track the origin of visitors, but anecdotally can report that out of town visitors often come in groups, for organized gatherings such as family reunions.
- The entertainment portion of the event has been expanded in recent years, and now includes a family stage with acts including dance, cheer and music. The event also includes a craft fair with more than 30 vendors.
Sweet Corn Festival Recommendations

HSP has identified the following priorities:

**REMOVE CARNIVAL FROM FESTIVAL PROGRAMMING**
Though the carnival portion of the festival has been utilized by residents, the inclusion of this in the event lowers the appeal to visitors as touring carnivals are traditionally local affairs. In addition, the carnival has increased rowdiness in previous festivals and has caused issues for local law enforcement.

**PROGRAM ADDITIONAL MUSIC AND REGIONAL LIVE ACTS**
Additional stages with live programming, particularly musical acts that have a draw in the region could increase the appeal of the event to those outside of Sun Prairie. In addition, a ticketed headliner act on the Saturday evening of the festival could generate additional revenue for the event.

**BALANCE OWNERSHIP AND INVOLVEMENT OF THE CITY AND THE CHAMBER**
Sweet Corn Festival is produced by the Chamber of Commerce to benefit its members. However, it is currently the most valuable event to Sun Prairie in terms of annual visitation. As such, an effort should be made for the City to partner with the Chamber to share the production of the event, allowing it to expand to other activities throughout the downtown area.
Taste of the Arts Fair

The Taste of the Arts Fair is another event organized by the Sun Prairie Chamber of Commerce. This event showcases over 100 vendors with a variety of crafts, fine art, garden art, jewelry, clothing, wood crafts, photography, oil and watercolor paintings, florals, and specialty foods.

The event takes place at Sheehan Park and includes prizes for vendors, a stage featuring local entertainment, and other special attractions like a wine and cheese tasting.

This event is not large enough to register data on the Placer.ai platform, which implies it has not grown to the point of generating visitation.
Headlines: Taste of the Arts Fair

HSP interviewed representatives from the Chamber and key stakeholders to better understand the Taste of the Arts Fair, its historical performance and areas for improvement. Key findings from this interview are listed below:

- The event is now in its 37th year but remains small and locally-focused. It is one of the main annual events that is hosted at Sheehan Park.
- The Taste of the Arts Fair has historically included commemorative programming celebrating Georgia O'Keefe, but this connection could be highlighted further to make the event unique to Sun Prairie.
- The future renovation and expansion of Sheehan Park would provide an opportunity to expand this event and its offerings.
- The event has successfully engaged both local artists and organizations as well as local businesses and brings together over 100 artisans and specialty food vendors for the community to enjoy.
- The 2019 event attracted eleven local businesses to sponsor the event.
Taste of the Arts Fair Recommendations

HSP HAS IDENTIFIED THE FOLLOWING PRIORITIES:

STRENGTHEN CONNECTION TO GEORGIA O’KEEFE

Sun Prairie is home to renowned American artist Georgia O'Keefe. Aside from the roadside plaque commemorating her homestead, there are not very many opportunities for Sun Prairie to highlight this fact. The Taste of the Arts Fair has included programming celebrating O'Keefe's career and work, but to date this has not been heavily marketed or emphasized. HSP recommends that this be made more central to the festival to attract additional visitation.

CONSIDER A STRONGER FOOD AND BEVERAGE THEME

The title of this event is somewhat misleading, as typically “Taste of” events in other locales are primarily food-focused. The Taste of the Arts Fair currently features a wine and cheese tasting and food vendors, but the focus is very much on the art itself. Working with local restaurants to highlight food as a work of art could attract a whole new segment of visitors to this festival. Restaurants and local artists could partner to create unique pairings for various elements of programming.

BALANCE LOCAL PROGRAMMING

The entertainment at the Taste of the Arts Fair has traditionally been provided by the Sun Prairie Area Chorus and Community Band. HSP recommends that local programming like this occur during the day and that the event continue into the evening with professional acts that may appeal to a wider demographic.
Groundhog Day

Groundhog Day is a long-held tradition in Sun Prairie. The 2020 Sun Prairie Groundhog Day Prognostication ceremony was the 72nd annual celebration and was held downtown in Cannery Square. It is one of the few events that activates the downtown district.

Following the ceremony, attendees can participate in the Hibernation Hustle Fun Run, which benefits the Dane County Boys and Girls Club.

This event is not large enough to register data on the Placer.ai platform, which implies it has not grown to the point of generating visitation.
Headlines: Groundhog Day

HSP interviewed representatives from the City and key stakeholders to better understand the annual Groundhog Day programming, its historical performance and areas for improvement. Key findings from this interview are listed below:

- Previous attendance has not been tracked, but anecdotally the ceremony is attended by dozens of people.
- The event begins with the Prognostication ceremony, led by the Mayor of Sun Prairie.
- The Groundhog Day Hibernation Hustle Fun Run was added to the program in 2019 and the proceeds benefitted the Boys and Girls Club of Dane County. The run was tied into the morning festivities in a clever way: If the Mayor reported that Jimmy the groundhog is predicting 6 more weeks of winter, event attendees would participate by running/walking a 2-mile route. If the Mayor reported that Jimmy is predicting an early spring, attendees would participate by running/walking a 5K route.
- The Prognostication ceremony takes place in Cannary Square, and this is one of the largest events held in the downtown core. The Fun Run similarly utilizes downtown, as the course for both routes begin at the corner of Cannery Place and Market Street and goes south to Linnerud Drive.
Groundhog Day Recommendations

HSP HAS IDENTIFIED THE FOLLOWING PRIORITIES:

CONTINUE AND EXPAND THE FUN RUN
The Hibernation Hustle was a great addition to this annual event. As the proceeds benefit a County-wide organization, there is opportunity to market to and draw participants from all across Dane County. Participation in the Fun Run will increase with additional programming for the runners to experience after the race. Special food and beverage events would keep participants in Sun Prairie for a longer visit during which that can spend in the downtown business district.

CONSIDER EVENING PROGRAMMING
Some of the most successful Groundhog Day celebrations in the country induce overnight stays by expanding the festival into the evening or over the course of two days. As the Prognostication ceremony takes place very early in the morning, many peer cities include programming the night before in an effort to generate room nights. Screenings of the popular film Groundhog Day, as well as related trivia events are successful in attracting a younger crowd.

TIE-IN WITH CELEBRATION OF WINTER SEASON
Another opportunity for expanding the Groundhog Day ceremony into a larger and/or longer event is to make it part of a broader celebration of the winter season. Winter sports and seasonal beverages and specialty foods could be featured as part of the programming.
Flags of Freedom

Flags of Freedom is an annual event that has occurred for the past 37 years and includes a parade and field show. The event is organized and produced by the Sun Prairie Band Boosters.

The event takes place on Independence Day weekend. Highlights include the Main Street parade which features over five dozen floats, vehicles or groups from area businesses and organizations.

In the remaining phase of this study, HSP will conduct interviews with stakeholders to determine this event’s historical performance and potential for improvement.
Stakeholder Feedback and Implications: Events and Attractions
Stakeholder Feedback

Destination Madison is a marketing organization that promotes tourism to the City of Madison and the Greater Madison area. HSP interviewed representatives from Destination Madison to better understand how the Greater Madison area promotes themselves and what tourism opportunities there are in this area. Key findings from this interview are listed below:

- The Sun Prairie Tourism Commission and Destination Madison currently have a contractual relationship to help administer room tax funds. This relationship should be analyzed and potentially expanded upon.
- The City of Madison has a strong supply of one-off sports facilities, but nothing of size for youth.
- Sun Prairie is experiencing a housing boom and is in a great location off the highway for a new development.
- Sun Prairie has a tremendous opportunity to develop its brand and enhance its two major events – Sweet Corn Festival and Groundhog Day. New restaurants and the new brewery should be used as leverage when developing the Sun Prairie brand.
- The Dane County area, in general, is lacking a quality, mid-sized, indoor entertainment venue. The area has large campus facilities and small venues.
Stakeholder Feedback

HSP interviewed representatives from the **Sun Prairie Chamber of Commerce** to better understand how the local Sun Prairie businesses and events generate economic impact for Sun Prairie and what other business opportunities there are in the area. Key findings from this interview are listed below:

- The recent development of new businesses in the Sun Prairie area has been focused towards big box retail. The downtown area does not get enough publicity and needs to be more connected to the community.
- The new Ashley Field should be utilized for an array of events and for community promotion.
- Sun Prairie does not have a big venue to host entertainment events. A flexible venue that can show entertainment for all ages and be surrounded by food and beverage options would be beneficial in the community. Though the central business district is still improving, there is a need for additional restaurant and nightlife opportunities.
- The community is very interested in more events for young professionals and for networking and development. Recently, a group of young professionals has organized to start their own group and will soon be absorbed by the Chamber.
- Prairie Athletic Club is one of the strongest assets that Sun Prairie currently has in terms of attracting outside visitation from Madison.
Event and Attraction Implications

After analyzing the current supply of entertainment venues in Sun Prairie and the Madison area, as well as the existing events that Sun Prairie hosts, HSP derived the following implications for this market:

- There is a gap in the market for any purpose-built entertainment or event venue, though Sun Prairie has effectively activated its outdoor spaces and public parks for annual events.
- Local involvement in event planning and production has been a useful way to encourage civic engagement but has also resulted in a calendar of events that are unlikely to appeal to non-residents or generate overnight stays.
- Nearby Madison has a range of venues and events that capture regional acts, so Sun Prairie must differentiate its offerings rather than trying to be directly competitive.
- Millennials, more than any generation that came before them, are interested in authentic experiences that celebrate a sense of place. Sun Prairie does not need to replicate the attractions of Madison or larger cities to attract visitation, but instead should think carefully about its brand and placemaking efforts to increase its appeal as a destination.
Event and Attraction Recommendations

HSP has identified the following priorities:

**Data Collection and Performance Tracking**
Majority of events and festivals in Sun Prairie have no way of tracking data related to the event attendance or other performance indicators. HSP recommends that a system be implemented to more formally track attendance at City-hosted events, so that any future improvements implemented have some measure for success.

**Broaden Appeal of Events for Visitors**
The event calendar in Sun Prairie is designed to cater to residents and local community groups. Attracting branded events that could have a regional draw might not be financially possible at this time, but the City could work to attract a third-party organizer to host an event in Sun Prairie in exchange for space or other logistic support.

**Increase Number of Ticketed Events**
Much of Sun Prairie’s current event programming is free to the public. Adding some larger regional acts that could draw an audience willing to pay for ticketed entry would not only generate additional revenue, but would bolster Sun Prairie’s reputation as a destination.
Sports
Local Youth Sports Facilities

The local youth sports facility supply within the City of Sun Prairie is limited. Sun Prairie High School and the Sun Prairie Ice Arena are the two most suitable facilities for tournament play. The new high school will also be suitable for tournament play, but high schools are typically booked with school-related events.

The local Sun Prairie market lacks a large youth sport facility that can host major tournaments.

The major attractions in Sun Prairie for sports venues and facilities include:

- Angell Park Speedway
- Sun Prairie Ice Arena
- Prairie Athletic Club
- Ashley Field

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Indoor / Outdoor</th>
<th>Multi-Purpose</th>
<th>Outdoor Diamonds</th>
<th>Tennis</th>
<th>Pickleball</th>
<th>Pool</th>
<th>Indoor Basketball</th>
<th>Indoor Turf</th>
<th>Ice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prairie Athletic Club</td>
<td>Indoor / Outdoor</td>
<td></td>
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<td></td>
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<td>Sun Prairie Family Aquatic Center</td>
<td>Outdoor</td>
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<td></td>
<td></td>
</tr>
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<td>Sun Prairie Ice Arena</td>
<td>Indoor</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ashley Field*</td>
<td>Outdoor</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Sheehan Park</td>
<td>Outdoor</td>
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<td></td>
<td></td>
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<td>Sun Prairie High School</td>
<td>Indoor / Outdoor</td>
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<td>1</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

**Average**

1 1 5 8 12 2 3 5 1 2

*Under Development

Source: Various Sources
Sun Prairie Ice Arena

Square Feet: 91,000

Seating Capacity: 1,700 (across 2 rinks)

The new state-of-the-art Sun Prairie Ice Arena contains 91,000 square feet of skating rinks, a spacious lobby, concession stands, restaurant space, skate shop, meeting rooms, locker rooms, party rooms, and much more. The rink is home to the Sun Prairie High School Hockey program as well as open/free skate, figure skating, adult hockey, and youth hockey programs.

The facility houses two NHL-sized rinks. The first is the Cardinal Rink which can seat up to 1,100 spectators and the second named the Tom & Rita Tubbs Rink can seat up to 600. The arena draws spectators and team from across the state due to the facility’s size, quality, and features.

The expansion of the Sun Prairie Ice Arena would provide opportunity for not only large regional hockey tournaments, but also provide the opportunity to host other ice-related events such as curling and figure skating.
Interview - Sun Prairie Ice Arena

HSP interviewed management of the Sun Prairie Ice Arena to better understand its event demand and how an expansion or new development could benefit the Arena and the overall area. Key findings from this interview are listed below:

- The Sun Prairie Ice Arena is a major, regional attraction for the area that needs to be promoted as so. The Arena opened in 2014.

- The Sun Prairie Ice Arena hosts more than 30 competitive hockey events per year. Roughly half of these events are tournaments that generate over night stays. In 2019, tournaments generated more than 300 room nights for the area. Roughly two-thirds of the teams stay two nights for a tournament.

- Lodging is critical for attendees of events at the Sun Prairie Ice Arena. Management highlighted that many teams and families are staying on the eastside of Madison because the hotels have a pool, a restaurant, and nearby entertainment.

- The Sun Prairie Ice Arena draws tourism from areas more than a four-hours drive away.

- An expansion of the Sun Prairie Ice Arena to a three-sheet ice arena would be tremendously beneficial for the area. It would be the only three-sheet ice arena in Wisconsin and would allow the arena to be a major competitor on the regional scale and potentially attract annual national events.
Visitation

HSP analyzed data, from Placer.ai, to better understand the visitation that the Sun Prairie Ice Arena generates every year.

The bottom graphic emphasizes the visitation that the Sun Prairie Ice Arena generates from weekend events, especially major tournaments.

More than 30% of visitation on Saturday and Sunday to the Sun Prairie Ice Arena comes from more than 165 miles away.
Metro/Regional Visitation

The majority of visitation to the Sun Prairie Ice Arena, outside of the Madison Metro area, comes from the Milwaukee and Chicago areas.

Roughly 20% of visits to the Sun Prairie Ice Arena come from over 50 miles, typically for competitive ice events. The Ice Arena especially draws visitation from the suburbs of Chicago and Minneapolis-St. Paul.

### Estimated Hotel Stays - Sun Prairie Ice Arena - 2019

<table>
<thead>
<tr>
<th>Visitor Origin Distance from Sun Prairie Ice Arena</th>
<th>Prior or Post Ice Arena Visit</th>
<th>Total Foot Traffic from this Distance</th>
<th>Percent that stay at hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL visits</td>
<td>Immediately Before</td>
<td>218,200</td>
<td>0.8%</td>
</tr>
<tr>
<td></td>
<td>Immediately Following</td>
<td>218,200</td>
<td>0.8%</td>
</tr>
<tr>
<td>25 - 50 miles</td>
<td>Immediately Before</td>
<td>62,300</td>
<td>3.1%</td>
</tr>
<tr>
<td></td>
<td>Immediately Following</td>
<td>62,300</td>
<td>2.9%</td>
</tr>
<tr>
<td>50 - 165 miles</td>
<td>Immediately Before</td>
<td>45,500</td>
<td>6.6%</td>
</tr>
<tr>
<td></td>
<td>Immediately Following</td>
<td>45,500</td>
<td>6.3%</td>
</tr>
<tr>
<td>165+ miles</td>
<td>Immediately Before</td>
<td>23,200</td>
<td>8.7%</td>
</tr>
<tr>
<td></td>
<td>Immediately Following</td>
<td>23,200</td>
<td>8.7%</td>
</tr>
</tbody>
</table>

Source: Placer.ai
Regional Visitation

The Sun Prairie Ice Arena is a major regional competitor. The facility has established a strong reputation in the Midwest for competitive play.

Roughly 15% of Sun Prairie Ice Arena visitors come from the Milwaukee and Chicago areas.

<table>
<thead>
<tr>
<th>Metro Area</th>
<th>Total Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicago</td>
<td>24,797</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>7,756</td>
</tr>
<tr>
<td>Minneapolis-St. Paul</td>
<td>4,419</td>
</tr>
<tr>
<td>St Louis</td>
<td>3,298</td>
</tr>
<tr>
<td>Green Bay-Appleton-Oshkosh</td>
<td>1,853</td>
</tr>
</tbody>
</table>

Source: Placer.ai
Peak demand for ice time is from October - February. This emphasizes the need for a flexible facility that can host an array of recreation events and mitigate the extreme seasonality during off-peak spring and summer months.

Roughly one-third of the visitor households earn between $75K and $100K, and more than 50% earn over $75,000.

The Sun Prairie Ice Arena is a consistent performer in bringing affluent visitors to Sun Prairie that will fill hotels during slow times for lodging demand.
Prairie Athletic Club

Square Feet: 250,000

The Prairie Athletic Club (PAC) is the state of Wisconsin’s largest recreational athletic facility with over 250,000 square feet of total space. PAC offers a variety of recreational activities and sports for all age groups. PAC has everything one would seek in a fitness center including, swimming pools, weight rooms, indoor fields, basketball courts, exercise classes, and even a large outdoor water park.

PAC has three different food and beverage options: Bob & Vel’s Coffee Shop, Lost Court Bar & Grill, and Parrot-Dise Palms Island Bar.

PAC has several different membership packages, training sessions, and group rentals for residents to choose from. Although the PAC has a strong supply of recreation offerings, the availability of these offerings, especially for non-members is limited.
The Prairie Athletic Center (PAC) is in Sun Prairie and is a major athletic club complex. HSP interviewed management of the Prairie Athletic Center to better understand the demand in the area for recreation and how a new development could benefit the PAC and the overall area. Key findings from this interview are listed below:

- The Prairie Athletic Center (PAC) is a tremendous recreation asset for the Sun Prairie community. Many stakeholders highlighted that the club is one of the major reasons people move to Sun Prairie.
- The PAC is a social, recreation club that has roughly 17,000 members and has a retention rate of roughly 85 percent.
- The Club’s major event is the Lou Bradley Memorial, an international racquetball tournament. The event is five days and brings in competitors from around the world. Spectators for these matches range from 50 to 200 people per match.
- Management of the center highlighted that members express that there needs to be more quality lodging in the Sun Prairie community and nicer restaurants.
Ashley Field

**Estimated Completion**: August 2020

Ashley Field is a core community feature of the city of Sun Prairie and has been for years. The field has hosted high school games, graduations, concerts, as well as several other events.

This past May the Sun Prairie School District and the Bank of Sun Prairie signed a 20-year deal for naming rights of the new stadium. Along with the addition of naming rights, Ashley Field will be redeveloped into a stat-of-the-art high school sports stadium. The field is due to host its first event Fall 2020. The new Bank of Sun Prairie Stadium at Ashley Field will be used by both Sun Prairie East and Sun Prairie West high schools for football, soccer, and lacrosse.
Madison MSA Youth Sports Facilities

It is critical to acknowledge the Madison MSA when conducting a supply analysis for the youth sports facility market in the area. The area has an array of quality, “one-off” facilities, but is lacking a facility that has a regional draw for youth sports.

The MSA is lacking an indoor facility with more than four basketball courts and is lacking an outdoor facility with more than four multi-purpose fields, other than Reddan Soccer Park which has 18 outdoor fields.
Madison MSA Youth Sports Facilities

The City of Madison and the surrounding cities that make up the Madison MSA compete with, but also compliment each other when inducing tourism into Dane County.

A dense supply of large sports facilities exist in the City of Madison, but the majority are one-off or university facilities that don’t target youth sports. Outside of the City of Madison, the supply of facilities is scattered and lacks any notable size.
Regional Youth Sports Facilities

The regional youth sports market, within 150 miles from Sun Prairie, presents more competition to a youth sports development in Sun Prairie than the local and MSA supply does.

Wisconsin Dells has indoor and outdoor sports facilities that will be a direct competitor to a sporting development in Sun Prairie.

The inclusion of major markets like Milwaukee and the Northwest suburbs of Chicago introduces a strong competitive mix of large, quality youth sports facilities.

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Location</th>
<th>Distance from Sun Prairie (Miles)</th>
<th>Indoor / Outdoor</th>
<th>Multipurpose</th>
<th>Multi-purpose - Turf</th>
<th>Outdoor Diamonds</th>
<th>Tennis</th>
<th>Pool</th>
<th>Indoor Basketball</th>
<th>Indoor Ice</th>
<th>Ice</th>
<th>HS</th>
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<tbody>
<tr>
<td>Janesville Youth Sports Complex</td>
<td>Janesville, WI</td>
<td>42.6</td>
<td>Outdoor</td>
<td>14</td>
<td>--</td>
<td>10</td>
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<td>6</td>
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<tr>
<td>D.L.K Kachel Fieldhouse</td>
<td>Whitewater, WI</td>
<td>44.9</td>
<td>Indoor</td>
<td>--</td>
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<td>--</td>
<td>1</td>
<td>6</td>
<td>12</td>
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</tr>
<tr>
<td>Dells Sports Complex</td>
<td>Wisconsin Dells, WI</td>
<td>52.3</td>
<td>Outdoor</td>
<td>2</td>
<td>6</td>
<td>4</td>
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<tr>
<td>Mauston Sports Complex</td>
<td>Wisconsin Dells, WI</td>
<td>52.3</td>
<td>Outdoor</td>
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<td>8</td>
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<tr>
<td>Dells Sports Dome</td>
<td>Wisconsin Dells, WI</td>
<td>52.3</td>
<td>Indoor</td>
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<td>10</td>
<td>20</td>
<td>1</td>
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<td>Center Court Sport Complex</td>
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<td>56.2</td>
<td>Indoor</td>
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<td>--</td>
<td>--</td>
<td>5</td>
<td>8</td>
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<tr>
<td>Stateline YMCA</td>
<td>Beloit, WI</td>
<td>60.5</td>
<td>Indoor</td>
<td>2</td>
<td>12</td>
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<td>Brookfield Soccer Complex</td>
<td>Brookfield, WI</td>
<td>63.4</td>
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<td>Rockton Athletic Fields</td>
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<td>Pettit National Ice Center</td>
<td>Milwaukee, WI</td>
<td>66.8</td>
<td>Indoor</td>
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<td>Wisconsin Center</td>
<td>Milwaukee, WI</td>
<td>72.2</td>
<td>Indoor</td>
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<td>Kem Center at MSOE</td>
<td>Milwaukee, WI</td>
<td>73.0</td>
<td>Indoor</td>
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<td>Mercyhealth Sportscore Two</td>
<td>Rockford, IL</td>
<td>73.5</td>
<td>Outdoor</td>
<td>26</td>
<td>7</td>
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<td>74.7</td>
<td>Outdoor</td>
<td>18</td>
<td>8</td>
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<tr>
<td>The Rock Sports Complex</td>
<td>Franklin, WI</td>
<td>74.9</td>
<td>Outdoor</td>
<td>--</td>
<td>--</td>
<td>6</td>
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<td>Milwaukee County Sports Complex</td>
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<td>79.0</td>
<td>Indoor</td>
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<td>2</td>
<td>4</td>
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<td>Indoor</td>
<td>--</td>
<td>--</td>
<td>8</td>
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<tr>
<td>Champions Center</td>
<td>Appleton, WI</td>
<td>92.9</td>
<td>Indoor</td>
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<td>--</td>
<td>4</td>
<td>6</td>
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<tr>
<td>Scheels USA Youth Sports Complex</td>
<td>Appleton, WI</td>
<td>99.2</td>
<td>Outdoor</td>
<td>15</td>
<td>4</td>
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<tr>
<td>Pleasant Prairie RecPlex</td>
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<td>105.7</td>
<td>Indoor / Outdoor</td>
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<td>Eastbay Sports Complex</td>
<td>Wausau, WI</td>
<td>142.2</td>
<td>Outdoor</td>
<td>15</td>
<td>--</td>
<td>--</td>
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</tr>
<tr>
<td><strong>Average</strong></td>
<td></td>
<td><strong>12</strong></td>
<td></td>
<td><strong>7</strong></td>
<td><strong>8</strong></td>
<td><strong>1</strong></td>
<td><strong>7</strong></td>
<td><strong>12</strong></td>
<td><strong>2</strong></td>
<td><strong>2</strong></td>
<td><strong>2</strong></td>
<td><strong>1</strong></td>
</tr>
</tbody>
</table>

Source: Various Sources
Regional Youth Sports Facilities

Regional youth sports events that generate room nights are key to the success of youth sports facilities. It is critical to assess the regional competitive landscape around Sun Prairie when considering to develop a youth sports facility.

As highlighted in the previous slide, the regional market around Sun Prairie introduces a competitive supply of quality, large youth sports facilities. These facilities represent the major competitors in the regional market.
Woodside Sports Complex

**Location:** Wisconsin Dells, WI

**Owner:** Private

**Operator:** Contemporary Services Corporation

- 6 outdoor turf fields
- 8 outdoor diamonds
- 90,000-square food indoor dome
  - 10 indoor basketball courts (20 volleyball courts)
- 1 indoor turf field
- Three lodging options with additional food & beverage and retail spaces

**Key Takeaways:**

The Woodside Sports Complex, and the three sporting facilities it is comprised of, will be a major competitor to any large sports facility development in Sun Prairie. The Woodside Sports Complex is successful due to its array of offerings.
Mercyhealth Sportscore

**Location:** Rockford, IL  
**Opened:** 2016  
**Owner:** City of Rockford  
**Operator:** Rockford Park District

- 26 multi-purpose fields at MS2  
- 18 multi-purpose fields at MS1  
- 8 outdoor diamonds  
- 60,000 square feet of indoor turf space  
- Food and beverage options

**Key Takeaways:**

The Rockford Area has developed itself into one of the major youth sports communities in the Midwest. The economy thrives from major youth sports tournaments generating overnight stays and spending in the community.
**UW Health Sports Factory**

**Location**: Rockford, IL  
**Opened**: 2016  
**Owner**: City of Rockford  
**Operator**: Rockford Park District

- 96,000 square feet
- 8 basketball courts (16 volleyball courts)
- Seating for up to 3,700 spectators
- Five meeting rooms
- Events plaza, restaurant/bar, riverfront boardwalk

**Key Takeaways:**

The Rockford Area relies heavily on being a major youth sports market. This venue expanded the area’s indoor youth sports offerings and was designed to be a destination for weekend tournaments, while also accommodating local needs during the week. The facility hosts approximately 30 to 40 weekend events annually.
Champions Center

Location: Appleton, WI
Opened: 2019
Owner: Fox Cities
Operator: Fox Cities Sports Development, Inc
- 164,000 square feet
- 4 basketball courts (6 volleyball courts)
- 1 NHL-sized ice rink with seating for 1,000
- Three meeting rooms
- On-site physical therapy clinic

Key Takeaways:
The Champions Center is one of the newest facilities in the region. Interviews with regional sports organizations highlighted that this facility has received a strong initial response since opening.
HSP interviewed management of the Champions Center in Appleton, WI to better understand the competitive landscape of the regional youth sports market and how the region reacts to new facility development. Key findings from this interview are listed below:

- The Champions Center was opened in November of 2019 as a major youth sports facility with the purpose of driving room nights to the Appleton area.

- One major driver of events for the facility is the combination of ice and courts. The ice sheets keep the facility busy annually. One of the ice sheets can transform into four courts to give the facility eight useable courts at one time. While making this transformation costs $20,000 every time, the flexibility gives the facility a competitive advantage over the smaller court facilities in the area.

- The youth basketball market has strong unmet demand. A large facility with more than eight courts would be able to attract regional tournaments.

- Rental rates for courts in the area range from $40 - $60 per hour and ice sheets rent between $200 - $250 per hour.

- The Champions Center's major competitors are the RecPlex in Pleasant Prairie and the UW Health Sports Factory in Rockford.
Madison Area Sports Commission is a sports organization that promotes sports events and sports facilities in the Greater Madison area. HSP interviewed representatives from the Madison Area Sports Commission to better understand the supply of sports facilities in the area and the demand for these types of events. Key findings from this interview are listed below:

- The MASC and Sun Prairie have a strong relationship where the MASC acts like a sales & marketing entity for the Sun Prairie Tourism Commission.

- The two best sporting assets in the Sun Prairie community are the Sun Prairie Ice Arena and the new High School facilities.

- A need for fields/courts in the Greater Madison area. Large parks in the community can be used for recreation, but no large, sports-focused facilities. Indoor sports is a great opportunity. An abundant supply of fieldhouses with up to four, indoor courts in the Greater Madison area exists, but major indoor tournaments need to use multiple facilities.

- The MASC wish list is for a long, outdoor field complex for soccer/lacrosse and an indoor complex with more than four courts. A flexible space, with both indoor/outdoor spaces would be the most beneficial for the entire area.
Interview - Wisconsin Sports Services

Wisconsin Sports Services, based in Madison, WI, is a sports organization that programs youth sports events in the State of Wisconsin. HSP interviewed representatives from Wisconsin Sports Services to better understand the trends in the youth sports market and the demand for local events and tournaments in the area. Key findings from this interview are listed below:

- Wisconsin Sports Services programs youth, from elementary to middle school ages, baseball, basketball, softball, and wrestling.
- Wisconsin youth sports has more of a regional focus than other states in the Midwest. The state is split into roughly six regional districts and it is hard to attract teams/attendees to go from one district to another for tournaments. However, the “new, shiny thing” can draw attendees from a larger radius than older facilities.
- The Madison area is limited in facility size for youth sports and many major facilities have outpriced the local entities.
- Local programming will be key for the success of a youth sports facility. While local programming will not draw as much revenue as tournaments will, local programming keeps the facility constantly busy.
- Some factors for attracting youth sports events include competition levels, available dates, location, hotels, and ancillary activities.
- The creation of youth sports tournaments/programs can be enhanced by being a big, new event that could potentially have ancillary smaller events.
Sports Market Implications

• The youth sports market presents a tremendous opportunity for Sun Prairie. The supply of facilities in the local and metro markets is lacking a quality, flexible facility that can mitigate the seasonality of the area. The supply in the local and metro markets consists of one-off facilities that can host large events, but not multiple events at a time.

• The demand for recreation, indoor and outdoor, in the local and metro markets spurs from local teams, clubs and adult leagues. This demand is not met by the current supply of facilities. The demand for competitive indoor space is extremely high, due to the seasonality of the area.

• The regional youth sports market introduces an abundant supply of facilities into the competitive mix, but also engages a massive population base of people from all demographics. To be able to compete consistently on a regional level and attract major tournaments to the Sun Prairie area, the development of a new youth sports facility needs to be large enough and flexible enough to host an array of sporting types and event sizes.

• The development of a new sports facility in Sun Prairie should aim to mitigate the extreme seasonality of the area by offering indoor/outdoor fields and courts. The facility should also aim to cater to state and regional tournaments as a top priority, but also help facilitate local sporting needs.

• The development of a large, quality youth sports facility will take up a considerable amount of land (roughly 15-30 acres).
Conventions & Meetings
The local supply of meeting venues in the Sun Prairie area is modest. Only five facilities exist and only two have over 7,000 square feet of total function space. The Loft at 132 is primarily used as a wedding venue, so the Hilton Garden Inn is the only true property that can consistently host meetings and small conferences.

### Sun Prairie Local Meeting Facilities

<table>
<thead>
<tr>
<th>Venue</th>
<th>Location</th>
<th>Facility Type</th>
<th>Total Function Space SF</th>
<th>Total Exhibit SF</th>
<th>Total Ballroom SF</th>
<th>Largest Ballroom SF</th>
<th>Total Meeting SF</th>
<th># of Meeting Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Prairie City Hall</td>
<td>Sun Prairie, WI</td>
<td>City Hall</td>
<td>1,600</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,600</td>
<td>1</td>
</tr>
<tr>
<td>Loft at 132</td>
<td>Sun Prairie, WI</td>
<td>Wedding Venue</td>
<td>7,500</td>
<td>0</td>
<td>7,500</td>
<td>7,500</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>The Round Table</td>
<td>Sun Prairie, WI</td>
<td>Banquet Hall</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>The Pavilion at Angell Park</td>
<td>Sun Prairie, WI</td>
<td>Banquet Hall</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Hilton Garden Inn</td>
<td>Sun Prairie, WI</td>
<td>Hotel</td>
<td>7,225</td>
<td>0</td>
<td>5,985</td>
<td>3,905</td>
<td>1,240</td>
<td>2</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td></td>
<td></td>
<td>5,442</td>
<td>0</td>
<td>4,495</td>
<td>3,802</td>
<td>947</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: Cvent, Various Facilities
Loft at 132

Meeting Space: 7,500 square feet

The Loft at 132 is a modern wedding and event space that opened in September 2018 and is located in Sun Prairie, Wisconsin. The ballroom is approximately 7,500 square feet and includes dark walnut flooring, cream city brick and natural lighting. The maximum capacity is 300 people and it can fit 30 banquet tables with 10 chairs per table. The venue also has a rooftop that can accommodate up to 300 people and has features such as green space, an outdoor bar, and cocktail tables.

To date, the facility has hosted over 40 weddings and 25 other events. Clientele visit from all over the nation, including states like Milwaukee, Chicago, California, Minneapolis, etc. When the venue is not hosting weddings or events, it opens as a bar. COVID-19 caused the facility to lose over 20 bookings, a majority of which were weddings.
Hilton Garden Inn

Meeting Space: 7,225 square feet

The Hilton Garden Inn is located in Sun Prairie, next to Prairie Lakes mall and 0.5 miles from Marcus Palace Cinema. The University of Wisconsin-Madison is ten miles away and the Dane County Regionall Airport is seven miles away. There is a 24-hour Pavilion Pantry and a restaurant called Johnny's Italian Steakhouse located in the hotel. There are two divisible ballrooms and two meeting rooms that are available for conferences, meetings, weddings, and social events.

Pre-COVID, there was very strong demand for the meeting space at the hotel. There were many days where all rooms were in use and the manager even brought on a salesperson to help with the high demand. The meeting space is very modern and features a state-of-the-art AV system. There is virtually no competition for meetings. A DoubleTree by Hilton will open in October/November with meeting space, but the location is not desirable.
In order to discuss a potential convention center, a thorough analysis of its competition is necessary. The table above includes a list of relevant competitors based on proximity to Sun Prairie and comparable space characteristics. The competitors are regional hotels, convention centers, a casino, and an expo center.

<table>
<thead>
<tr>
<th>Venue</th>
<th>Location</th>
<th>Distance from Destination (Miles)</th>
<th>Facility Type</th>
<th>Total Function Space SF</th>
<th>Total Exhibit Space SF</th>
<th>Total Ballroom SF</th>
<th>Largest Ballroom SF</th>
<th>Total Meeting Space SF</th>
<th># of Meeting Rooms</th>
<th>Onsite Hotel Rooms</th>
<th>Walkable Hotels</th>
<th>Walkable Hotel Rooms</th>
<th>Hotel Rooms / 1,000 SF of Exhibit Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alliant Energy Center</td>
<td>Madison, WI</td>
<td>14.9</td>
<td>Entertainment Complex</td>
<td>120,320</td>
<td>100,000</td>
<td>0</td>
<td>0</td>
<td>20,320</td>
<td>14</td>
<td>140</td>
<td>2</td>
<td>283</td>
<td>2</td>
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<tr>
<td>Kalahari Resorts and Conventions</td>
<td>Baraboo, WI</td>
<td>49.8</td>
<td>Hotel</td>
<td>96,954</td>
<td>0</td>
<td>73,760</td>
<td>20,980</td>
<td>23,194</td>
<td>18</td>
<td>756</td>
<td>--</td>
<td>--</td>
<td>8</td>
</tr>
<tr>
<td>Monona Terrace Community and Convention Center</td>
<td>Madison, WI</td>
<td>12.5</td>
<td>Convention Center</td>
<td>62,830</td>
<td>37,200</td>
<td>20,364</td>
<td>13,504</td>
<td>5,256</td>
<td>11</td>
<td>240</td>
<td>3</td>
<td>618</td>
<td>10</td>
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<tr>
<td>Wildwood Marriott West</td>
<td>Middleton, WI</td>
<td>23.6</td>
<td>Hotel</td>
<td>46,126</td>
<td>29,608</td>
<td>9,900</td>
<td>9,800</td>
<td>6,718</td>
<td>7</td>
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<td>Wisconsin Union Hotel</td>
<td>Madison, WI</td>
<td>14.9</td>
<td>Hotel</td>
<td>40,600</td>
<td>0</td>
<td>19,964</td>
<td>11,300</td>
<td>17,252</td>
<td>18</td>
<td>617</td>
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<td>--</td>
<td>1</td>
</tr>
<tr>
<td>Chula Vista Resort, Trademark Collection by Wyndham</td>
<td>Merrimac, WI</td>
<td>40.4</td>
<td>Hotel</td>
<td>37,201</td>
<td>0</td>
<td>19,964</td>
<td>11,300</td>
<td>17,252</td>
<td>18</td>
<td>617</td>
<td>--</td>
<td>--</td>
<td>17</td>
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<tr>
<td>Madison Concourse Hotel and Governor’s Club</td>
<td>Madison, WI</td>
<td>12.5</td>
<td>Hotel</td>
<td>34,498</td>
<td>0</td>
<td>20,401</td>
<td>10,201</td>
<td>14,097</td>
<td>14</td>
<td>366</td>
<td>--</td>
<td>--</td>
<td>11</td>
</tr>
<tr>
<td>Abbey Resort &amp; Avani Spa on Lake Geneva</td>
<td>Lake Geneva, WI</td>
<td>71.0</td>
<td>Hotel &amp; Spa</td>
<td>34,108</td>
<td>0</td>
<td>19,954</td>
<td>10,150</td>
<td>14,154</td>
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<tr>
<td>Wilderness Hotel &amp; Golf Resort</td>
<td>Wisconsin Dells, WI</td>
<td>50.1</td>
<td>Hotel</td>
<td>30,582</td>
<td>0</td>
<td>23,635</td>
<td>14,023</td>
<td>6,047</td>
<td>12</td>
<td>927</td>
<td>--</td>
<td>--</td>
<td>30</td>
</tr>
<tr>
<td>Ho-Chunk Gaming Wisconsin Dells</td>
<td>Wisconsin Dells, WI</td>
<td>52.3</td>
<td>Casino</td>
<td>26,810</td>
<td>0</td>
<td>26,588</td>
<td>13,299</td>
<td>3,212</td>
<td>5</td>
<td>302</td>
<td>1</td>
<td>302</td>
<td>10</td>
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<tr>
<td>Green Lake Conference Center &amp; Lakeside Hotels</td>
<td>Green Lake, WI</td>
<td>56.5</td>
<td>Hotel/Conference Center</td>
<td>28,950</td>
<td>0</td>
<td>19,688</td>
<td>7,957</td>
<td>9,262</td>
<td>13</td>
<td>213</td>
<td>1</td>
<td>213</td>
<td>7</td>
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<tr>
<td>The Pyle Center</td>
<td>Madison, WI</td>
<td>13.1</td>
<td>Conference Center</td>
<td>28,353</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>28,353</td>
<td>29</td>
<td>0</td>
<td>4</td>
<td>411</td>
<td>14</td>
</tr>
<tr>
<td>Lake Lawn Resort</td>
<td>Delavan, WI</td>
<td>69.3</td>
<td>Hotel</td>
<td>24,794</td>
<td>0</td>
<td>8,080</td>
<td>5,170</td>
<td>16,714</td>
<td>14</td>
<td>270</td>
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<td>11</td>
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<tr>
<td>The Ingleside Hotel</td>
<td>Pewaukee, WI</td>
<td>53.7</td>
<td>Hotel</td>
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<td>0</td>
<td>12,000</td>
<td>7,200</td>
<td>12,028</td>
<td>13</td>
<td>194</td>
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<tr>
<td>Devil's Head Resort</td>
<td>Merrimac, WI</td>
<td>43.8</td>
<td>Hotel</td>
<td>18,526</td>
<td>0</td>
<td>9,000</td>
<td>5,400</td>
<td>9,525</td>
<td>4</td>
<td>242</td>
<td>--</td>
<td>--</td>
<td>13</td>
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<tr>
<td>Best Western Premier Park Hotel</td>
<td>Madison, WI</td>
<td>12.6</td>
<td>Hotel</td>
<td>16,859</td>
<td>0</td>
<td>10,346</td>
<td>5,208</td>
<td>6,513</td>
<td>6</td>
<td>213</td>
<td>--</td>
<td>--</td>
<td>13</td>
</tr>
<tr>
<td>Sheraton Madison Hotel</td>
<td>Madison, WI</td>
<td>17.7</td>
<td>Hotel</td>
<td>16,065</td>
<td>0</td>
<td>7,100</td>
<td>5,300</td>
<td>8,355</td>
<td>10</td>
<td>239</td>
<td>--</td>
<td>--</td>
<td>15</td>
</tr>
<tr>
<td>The Edgewater</td>
<td>Madison, WI</td>
<td>12.6</td>
<td>Hotel</td>
<td>12,727</td>
<td>0</td>
<td>7,810</td>
<td>6,150</td>
<td>4,917</td>
<td>3</td>
<td>202</td>
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<td>--</td>
<td>16</td>
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<tr>
<td>Holiday Inn Express Hotel Janesville</td>
<td>Janesville, WI</td>
<td>40.7</td>
<td>Hotel</td>
<td>10,000</td>
<td>0</td>
<td>10,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>142</td>
<td>--</td>
<td>--</td>
<td>14</td>
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<tr>
<td>Average</td>
<td>--</td>
<td>38,077</td>
<td>9,029</td>
<td>16,902</td>
<td>8,725</td>
<td>12,146</td>
<td>13</td>
<td>305</td>
<td>2</td>
<td>365</td>
<td>11</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Alliant Energy Center

Rooms: 140

Meeting Space: 120,320 square feet

The Alliant Energy Center’s Exhibition Hall is the leading convention center in Wisconsin, hosting over 500 events annually. The type of events hosted at the facility include major international conventions, conferences and trade shows.

Some features of the expo hall include 100,000 square feet of unobstructed exhibit space and 20,000 square feet of meeting space. The venue offers amenities such as high-speed internet, in-house catering, in-house decorating, AV equipment, 5,800 onsite parking spaces, and an attached hotel connected by a climate-controlled walkway.
Kalahari Resorts and Conventions

Rooms: 756

Meeting Space: 96,954 square feet

The Kalahari Resorts and Convention Center is located off exit 92 in Wisconsin Dells. The facility has the Wisconsin's largest indoor waterpark, a 77,000-square foot outdoor waterpark, 110,000-square foot adventure park, and many other entertainment/dining options.

The facility has 18 meeting rooms and 3 ballrooms, the largest of which is 52,000 square feet. The largest ballroom was added in a recent expansion that nearly doubled the total meeting space offered by the facility. Some amenities included by the facility include complimentary Wifi, free parking, state-of-the-art Crestron lighting and A/V controls, available catering, and numerous built-in projectors/monitors.
Monona Terrace Community and Convention Center

Rooms: 240

Meeting Space: 62,830 square feet

The Monona Terrace Community and Convention Center is located in downtown Madison and hosts over 600 conventions, meetings, and weddings each year. The facility includes nearly 40,000 square feet of exhibit hall space, 20,000 square feet of ballroom space, and 11 meeting rooms totaling approximately 5,000 square feet.

Approximately 50% of the operating revenue is generated from the 60 conferences and conventions each year. The rest of the revenue is generated from wedding, entertainment and other events. In addition, 60% - 70% of the business consists of local, one-day meetings where visitors drive in. Some competitors include the Marriot Madison West, University of Wisconsin and Kalahari Resorts and Conventions.
Meetings Market Interview Feedback

• Meeting participants who visit Wisconsin for Madison will stay in Madison, not in surrounding cities like Sun Prairie.

• Larger conferences with more than 800 people are growing, as opposed to smaller conferences with under 400 people.

• It will be tough for any outlying communities to compete for Madison’s meeting demand due to the city’s abundant amenities, high-quality meeting facilities, and high number of hotel rooms.

• Madison is expensive and can be difficult to work with due to its licensing and structuring, which means nearby cities may have an opportunity to capture some meeting demand due to lost business.

• Increased event-specific marketing by local businesses can boost sales and overall boost the economic benefits of meetings and conventions.
Meeting Market Implications

• The Hilton Garden Inn is the only facility in Sun Prairie that can consistently host meetings and conventions.
• The regional meetings market has a large supply of hotels with attached total function space of up to 50,000 square feet.
• Few indoor/outdoor entertainment venues exist in the region and Sun Prairie could complement the existing supply by developing this type of facility.
• Due to new reduced capacities for event spaces, there may be opportunity for Sun Prairie to poach events that were previously held in Madison.
• Madison has a strong-hold on most large meetings and conventions due to its first-class facilities, multitude of entertainment/dining options, and number of walkable hotel rooms available.
Hotel
<table>
<thead>
<tr>
<th>Chainscale</th>
<th>Rooms</th>
<th>% of Total Rooms</th>
<th>Hotels</th>
<th>Rooms per Hotel</th>
<th>Avg Opening Year</th>
<th>Avg Age in Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxury</td>
<td>568</td>
<td>6%</td>
<td>3</td>
<td>189</td>
<td>Mar-00</td>
<td>20</td>
</tr>
<tr>
<td>Upper Upscale</td>
<td>685</td>
<td>7%</td>
<td>6</td>
<td>114</td>
<td>Dec-87</td>
<td>--</td>
</tr>
<tr>
<td>Upscale</td>
<td>2,032</td>
<td>21%</td>
<td>21</td>
<td>97</td>
<td>Apr-99</td>
<td>21</td>
</tr>
<tr>
<td>Upper Midscale</td>
<td>3,218</td>
<td>33%</td>
<td>29</td>
<td>111</td>
<td>Jun-03</td>
<td>17</td>
</tr>
<tr>
<td>Midscale</td>
<td>1,461</td>
<td>15%</td>
<td>21</td>
<td>70</td>
<td>Dec-95</td>
<td>25</td>
</tr>
<tr>
<td>Economy</td>
<td>1,872</td>
<td>19%</td>
<td>39</td>
<td>48</td>
<td>Oct-74</td>
<td>46</td>
</tr>
<tr>
<td><strong>Total/Average</strong></td>
<td><strong>9,836</strong></td>
<td><strong>100%</strong></td>
<td><strong>119</strong></td>
<td><strong>105</strong></td>
<td><strong>Aug-93</strong></td>
<td>26</td>
</tr>
</tbody>
</table>

Source: Smith Travel Research, Hunden Strategic Partners

HSP, using data from Smith Travel Research, identified the lodging supply in Dane County. This supply includes 119 hotels, equating to 9,836 rooms in the County. The largest percentage of room nights comes from upper midscale properties, followed by upscale properties. Approximately 71% of the hotels in Dane County are in Madison, Wisconsin. The Dane County lodging market contains 39 economy properties, 21 midscale properties, 29 upper midscale properties, 21 upscale properties, six upper upscale properties and three luxury properties.
Local Hotel Competitive Set Map

HSP identified nine hotels within 5.5 miles of Cannery Square in Sun Prairie. The Hilton Garden Inn is the only hotel in the competitive set that is in Sun Prairie. The rest of the hotels in the competitive set are in East Madison.

The cluster of upper midscale and upscale hotels are positioned at the intersection of Interstate 90/94 and US Highway 151.
HSP identified the Sun Prairie local hotel competitive set by conducting market research and interviewing local hoteliers. HSP believes that this hotel’s competitive set best reflects the local Sun Prairie hotel market and its performance. The competitive set contains nine hotels within roughly six miles of the OECC, ranging from 66 to 138 keys.

### Sun Prairie Hotel Competitive Set

<table>
<thead>
<tr>
<th>Property</th>
<th>Distance from Site (miles)</th>
<th># of Rooms</th>
<th>Chainscale</th>
<th>Open Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton Garden Inn Madison Sun Prairie</td>
<td>3.2</td>
<td>124</td>
<td>Upscale</td>
<td>Sep-18</td>
</tr>
<tr>
<td>Staybridge Suites Madison-East</td>
<td>4.9</td>
<td>90</td>
<td>Upscale</td>
<td>Mar-01</td>
</tr>
<tr>
<td>Cambria Hotels Madison East</td>
<td>5.0</td>
<td>121</td>
<td>Upscale</td>
<td>Jul-09</td>
</tr>
<tr>
<td>Holiday Inn Express &amp; Suites Madison</td>
<td>5.1</td>
<td>106</td>
<td>Upper Mid</td>
<td>Dec-16</td>
</tr>
<tr>
<td>Holiday Inn Madison @ The American Center</td>
<td>5.1</td>
<td>138</td>
<td>Upper Mid</td>
<td>Apr-07</td>
</tr>
<tr>
<td>Fairfield Inn &amp; Suites Madison East</td>
<td>5.3</td>
<td>130</td>
<td>Upper Mid</td>
<td>Aug-09</td>
</tr>
<tr>
<td>Courtyard Madison East</td>
<td>5.3</td>
<td>127</td>
<td>Upscale</td>
<td>Feb-03</td>
</tr>
<tr>
<td>Hampton Inn Madison East Towne Mall Area</td>
<td>5.5</td>
<td>115</td>
<td>Upper Mid</td>
<td>Sep-88</td>
</tr>
<tr>
<td>Residence Inn Madison East</td>
<td>5.5</td>
<td>66</td>
<td>Upscale</td>
<td>Dec-03</td>
</tr>
</tbody>
</table>

**Total/Average**

1,017 -- Jun-05

Source: Smith Travel Research
Hilton Garden Inn Madison Sun Prairie

Rooms: 124

The Hilton Garden Inn Madison Sun Prairie opened in 2018 and is the highest quality hotel in Sun Prairie, as well as the rate leader where it operates. It is located next to the Prairie Lakes Mall and offers free shuttles to and from the Dane County Regional Airport that is located seven miles away.

Roughly 60% - 65% of the hotel’s business stems from corporate travelers and 35-40% is from leisure. The only true competitor, in regard to pricing and management quality, is the Courtyard Madison East. The hotel does not compete with hotels in downtown Madison because people who go to Wisconsin for Madison will stay in the downtown area. The restaurant in the hotel, Johnny’s Italian Steakhouse, does well and is seen as an affordable option for high-quality dining.
Courtyard Madison East

Rooms: 127

The Courtyard Madison East opened in 2003 and is located on the intersection of Interstate 90 and US Highway 151. The hotel is near popular buildings such as the East Towne Mall, downtown Madison, the University of Wisconsin-Madison, Kohl Center and Alliant Energy Center. Some amenities offered include complimentary WiFi, an in-building restaurant, fitness center, indoor pool, and airport shuttle to and from the Dane County Regional Airport.

The hotel features a 1,080-square foot meeting room that is divisible into two rooms and may be used for meetings/events. There is AV equipment for rent as well. The meeting room was consistently used three to four days a week pre-COVID. Summer and fall are the peak months due to corporate travel, wedding season, and sports season.
Fairfield Inn & Suites Madison East

Rooms: 130

The Fairfield Inn & Suites Madison East opened in 2009 and is located off Interstate 90/94. Some major companies nearby include American Family Insurance, Alliant Energy, GE Healthcare, and QBE. The hotel has many amenities including a complimentary hot breakfast buffet, free WiFi, well-lit desks, 24-hour fitness center and an indoor pool. The facility does not have any meeting space on-site.

The location of the hotel and the Marriot brand name are both competitive advantages that the facility has over its competitors. Many travelers come from the interstate and stay the night at the Fairfield. Marriot.com is also very useful for marketing purposes and setting quality standards.
Competitive Hotel Performance

The local competitive set generally experienced strong growth during the past eight years. As the US economy continued its robust recovery from 2012 to 2015, ADR increased nearly 15%, occupancy increased roughly 10% and RevPAR grew approximately 27%. When 106 keys were added in December 2016 and 124 keys were added in September 2018, the competitive set continued to perform relatively well but the growth rate somewhat decelerated. From 2016 to 2019, ADR increased by 3.4% while occupancy decreased by 6%, which is expected when new supply enters the market and increases the number of rooms by nearly 28%.

<table>
<thead>
<tr>
<th>Year</th>
<th>Annual Avg. Available Rooms</th>
<th>Available Room Nights</th>
<th>% Change</th>
<th>Room Nights Sold</th>
<th>% Change</th>
<th>% Occ.</th>
<th>% Change</th>
<th>ADR</th>
<th>% Change</th>
<th>RevPar</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>787</td>
<td>287,255</td>
<td></td>
<td>188,079</td>
<td></td>
<td>65.5</td>
<td></td>
<td>$101.42</td>
<td></td>
<td>$66.40</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>787</td>
<td>287,255</td>
<td>0.0%</td>
<td>201,914</td>
<td>7.4%</td>
<td>70.3</td>
<td>7.4%</td>
<td>$103.35</td>
<td>1.9%</td>
<td>$72.65</td>
<td>9.4%</td>
</tr>
<tr>
<td>2014</td>
<td>787</td>
<td>287,255</td>
<td>0.0%</td>
<td>205,432</td>
<td>1.7%</td>
<td>71.5</td>
<td>1.7%</td>
<td>$108.45</td>
<td>4.9%</td>
<td>$77.56</td>
<td>6.8%</td>
</tr>
<tr>
<td>2015</td>
<td>787</td>
<td>287,255</td>
<td>0.0%</td>
<td>207,602</td>
<td>1.1%</td>
<td>72.3</td>
<td>1.1%</td>
<td>$116.27</td>
<td>7.2%</td>
<td>$84.03</td>
<td>8.3%</td>
</tr>
<tr>
<td>2016</td>
<td>796</td>
<td>290,541</td>
<td>1.1%</td>
<td>214,700</td>
<td>3.4%</td>
<td>73.9</td>
<td>2.2%</td>
<td>$118.64</td>
<td>2.2%</td>
<td>$87.82</td>
<td>4.5%</td>
</tr>
<tr>
<td>2017</td>
<td>893</td>
<td>325,945</td>
<td>12.2%</td>
<td>229,622</td>
<td>7.0%</td>
<td>70.4</td>
<td>-4.7%</td>
<td>$120.75</td>
<td>1.6%</td>
<td>$85.07</td>
<td>-3.1%</td>
</tr>
<tr>
<td>2018</td>
<td>934</td>
<td>341,073</td>
<td>4.6%</td>
<td>239,964</td>
<td>4.5%</td>
<td>70.4</td>
<td>-0.1%</td>
<td>$120.19</td>
<td>-0.5%</td>
<td>$84.56</td>
<td>-0.6%</td>
</tr>
<tr>
<td>2019</td>
<td>1,017</td>
<td>371,205</td>
<td>8.8%</td>
<td>257,808</td>
<td>7.4%</td>
<td>69.5</td>
<td>-1.3%</td>
<td>$122.86</td>
<td>2.2%</td>
<td>$85.33</td>
<td>0.9%</td>
</tr>
<tr>
<td>2020 (July)</td>
<td>1,012</td>
<td>215,604</td>
<td>0.0%</td>
<td>98,482</td>
<td>-35.5%</td>
<td>45.7</td>
<td>-35.5%</td>
<td>$98.25</td>
<td>-17.4%</td>
<td>$44.88</td>
<td>-46.7%</td>
</tr>
</tbody>
</table>

CAGR* (2012-2019) 4.2% 4.2% -- 5.3% -- 0.9% -- 3.0% -- 4.1% --

*Compound Annual Growth Rate

Source: Smith Travel Research, Hunden Strategic Partners
Supply & Demand Hotel Room Nights

The supply of room nights in the local area was stagnant from 2012 to 2015. The introduction of the Holiday Inn Express & Suites Madison in 2016 and the Hilton Garden Inn Madison Sun Prairie in 2018 brought 230 rooms to the market, which is why the supply increased in the last few years.

Demand followed supply as it steadily increased when the new, high-quality hotel rooms were added to the local market. COVID-19 is the reason why the demand trendline has recently declined.
Room Revenue Change

Any data point greater than zero is a positive indicator for the competitive set.

The year-over-year room revenue change for the competitive set has been positive overall, except for the negative period during early-2020. The large decrease from February 2020 to April 2020 is due to COVID-19.

The competitive set’s room revenue from January 2013 to February 2020 fluctuated between a positive 26% change and a negative 12% change. Throughout this time period, the positive trend has remained steady.
Revenue per Available Room

The trend line shows that RevPAR has steadily increased from the beginning of 2012 to the end of 2016. From early-2017 to early-2020, the RevPAR has overall hovered at the $85 range. The consistent increase in RevPAR is an indicator of a healthy market. As with most cities that have distinct seasons, RevPAR was lowest for the local competitive set during the winter months.
Seasonality – Occupancy and ADR

The adjacent tables detail the seasonal performance of the competitive hotel set over the last eight years. As shown, the local hotels experienced tremendous occupancy from June to October, which lines up with heavy leisure travel and warm weather. The lowest occupancy period is during the winter and early spring months. Rate generally mirrors occupancy (shown in the bottom chart) demonstrating that local hotels experience rate compression when demand is highest.
The adjacent figures demonstrate the day of week performance of the competitive hotel set from August 2019 through July 2020. The occupancy is highest from Monday to Wednesday, demonstrating a stronger corporate than leisure market. Average rates are highest during the week, reemphasizing the strong corporate demand. Average rates experience a notable decrease Thursday through Saturday, indicating the lesser leisure demand.
Heat Charts

The adjacent heat charts summarize the day of week by month performance of the hotel market over the last calendar year.

The heat charts further indicate how strong corporate demand is during summer and fall. Occupancy peaks in August, September and October, exceeding 74% in all months on average. Rate peaks in the same months, average rates for those months surpassing $129 per night.

As shown on the previous slide, occupancy is typically highest during weekdays when corporate travelers are staying in hotels. Average daily rate tends to mirror occupancy.

Sources: Smith Travel Research
Unaccommodated Room Nights

Based on existing occupancy levels, HSP estimates that there were 11,500 to 16,000 unaccommodated room nights in the competitive set during the past five years. As occupancy has been slightly increasing, unaccommodated room nights in this market has also increased.

Source: Hunden Strategic Partners
Some of the largest demand drivers include Epic Systems, Reebok CrossFit Games and the World Dairy Expo.

When large conventions or meetings are held in downtown Madison, the downtown hotels reach capacity before the demand compresses out to hotels in the suburbs.

Visitors who are traveling to Wisconsin to visit Madison will not stay in surrounding cities unless there are no more rooms available, or they are looking for cheaper rates.

The competitive set of hotels primarily operate in a business travel market but also generate strong demand from the sports market and proximate interstate.

The sports market brings room nights from hockey in the fall/winter and baseball or softball during the spring/summer. The University of Wisconsin-Madison sporting events like football games also drive demand.

The peak months for hotels are in the summer and fall when there is extensive corporate travel, frequent sporting events and numerous weddings.

Pre-COVID, the local area’s ADR was roughly $110-$120 and the occupancy ranged from 60% - 70%.

The segmentation for most hotels was approximately 40% corporate, 25% group, and 35% leisure. The hotels adjacent to the American Center business park absorb additional corporate demand.

At this time, corporate travel has evaporated because many people are working from home.
Hotel Market Implications

- The market absorbed the 124 keys from the upscale Hilton Garden Inn with minimal effects to ADR and occupancy. Pre-COVID, the market was generally performing well from the beginning of 2012 to early 2020.
- The introduction of an 80-100 key boutique hotel with attached experiential retail/restaurant/event space in downtown Sun Prairie could attract new tourists/visitors and increase the available room supply in the city.
- The growing local sports market will require more room nights and a new hotel could help satisfy this increasing demand.
- The development of a new event center would bring an inflow of new convention/meeting business, and an attached medium-large sized, upscale hotel would complement the space.
Retail & Food and Beverage
Sun Prairie Overview: Retail & Restaurant

Sun Prairie is situated northeast of the downtown Madison area, which is a major locale in this region for shopping, dining, and entertainment. Sun Prairie offers residents and those passing through a variety of options when it comes to restaurants and bars. Sun Prairie has two major areas that have high concentrations of retail and restaurant establishments, Prairie Lakes Shopping Center along Highway 151 and the historic downtown of Sun Prairie located adjacent to Cannery Square and stretching down Main Street towards Highway 151.

HSP believes that identifying the supply and demand of Sun Prairie’s retail and restaurant offerings will be critical in assessing potential sites for future community developments.
Restaurant Node Analysis

Two major restaurant nodes exist in the city of Sun Prairie. The first being downtown Sun Prairie, which is where Main Street stretches from the Highway 151 through the center of town and past Cannery Square. The local food and beverage supply in this area of Sun Prairie mainly consists of American bars and breweries around the center of downtown and around the highway the supply becomes more populated with fast food and fast casual restaurants and eateries. Few higher-priced restaurants in the City exist, however the supply is for the majority fast casual and fast-food.

The second restaurant node is located south of the downtown along Highway 151, Prairie Lakes Shopping Center. Prairie Lakes is anchored by several big box retailers with support by surrounding fast food and fast casual restaurants. A few higher-priced sit-down dining options are available, however the restaurants are largely focused on servicing daily shoppers passing through.

<table>
<thead>
<tr>
<th>Business Name</th>
<th>Type</th>
<th>Cuisine</th>
<th>Price Point</th>
<th>Google Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnny’s Italian Steakhouse</td>
<td>Casual Dining</td>
<td>Steakhouse</td>
<td>$$$</td>
<td>3.9</td>
</tr>
<tr>
<td>Buck &amp; Honey’s- Sun Prairie</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Meze Mediterranean Grill</td>
<td>Casual Dining</td>
<td>Mediterranean</td>
<td>$</td>
<td>4.7</td>
</tr>
<tr>
<td>Pat O’Malley’s Jet Room</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>Erin’s Snug Irish Pub and Restaurant</td>
<td>Casual Dining</td>
<td>Irish</td>
<td>$</td>
<td>4.3</td>
</tr>
<tr>
<td>Monk’s Bar &amp; Grill</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.3</td>
</tr>
<tr>
<td>Nitty Gritty</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>Sakura Shizen Japanese Restaurant</td>
<td>Casual Dining</td>
<td>Japanese</td>
<td>$</td>
<td>4.8</td>
</tr>
<tr>
<td>Tipsy Cow</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>Roadside Grill</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Dickey’s Bar &amp; Grill</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Full Mile Beer Company &amp; Kitchen</td>
<td>Casual Dining</td>
<td>Brewery</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Perkins Restaurant &amp; Bakery</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>El Patron Mexican Grill</td>
<td>Casual Dining</td>
<td>Mexican</td>
<td>$</td>
<td>4.0</td>
</tr>
<tr>
<td>Gehr’s Grill</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>3.4</td>
</tr>
<tr>
<td>Takumi Japanese Restaurant</td>
<td>Casual Dining</td>
<td>Japanese</td>
<td>$</td>
<td>4.5</td>
</tr>
<tr>
<td>Journey Sushi &amp; Seafood Buffet</td>
<td>Casual Dining</td>
<td>Seafood</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>Texas Roadhouse</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.3</td>
</tr>
<tr>
<td>Market Street Diner</td>
<td>Casual Dining</td>
<td>American Diner</td>
<td>$</td>
<td>4.0</td>
</tr>
<tr>
<td>Maharana Indian Restaurant</td>
<td>Casual Dining</td>
<td>Indian</td>
<td>$</td>
<td>4.2</td>
</tr>
<tr>
<td>Glass Nickel Pizza Co.</td>
<td>Casual Dining</td>
<td>Pizza</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>Eddie’s Alehouse &amp; Eatery</td>
<td>Casual Dining</td>
<td>Gastropub</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>MACS</td>
<td>Casual Dining</td>
<td>American</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>MOOYAH Burgers, Fries &amp; Shakes</td>
<td>Fast Casual</td>
<td>American</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>Salvatorino’s Tomato Pies</td>
<td>Fast Casual</td>
<td>Pizza</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>UNO Pizzeria &amp; Grill</td>
<td>Fast Casual</td>
<td>Pizza</td>
<td>$</td>
<td>4.0</td>
</tr>
<tr>
<td>Pizza Ranch</td>
<td>Fast Casual</td>
<td>American</td>
<td>$</td>
<td>4.1</td>
</tr>
<tr>
<td>Dickey’s Barbecue Pit</td>
<td>Fast Casual</td>
<td>Barbecue</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Guiller’s Mexican Restaurant</td>
<td>Fast Casual</td>
<td>Mexican</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>Pine Cone Restaurant</td>
<td>Fast Casual</td>
<td>American Diner</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Buranchos Fresh Mexican Grill</td>
<td>Fast Casual</td>
<td>Mexican</td>
<td>$</td>
<td>4.3</td>
</tr>
<tr>
<td>Chang Jiang</td>
<td>Fast Casual</td>
<td>Chinese</td>
<td>$</td>
<td>4.3</td>
</tr>
<tr>
<td>Varsity Bar &amp; Grill</td>
<td>Fast Casual</td>
<td>American</td>
<td>$</td>
<td>4.2</td>
</tr>
<tr>
<td>MOD Pizza</td>
<td>Fast Casual</td>
<td>Pizza</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>Chicken Licks</td>
<td>Fast Casual</td>
<td>American</td>
<td>$</td>
<td>4.6</td>
</tr>
<tr>
<td>McGee’s Chicken</td>
<td>Fast Casual</td>
<td>American</td>
<td>$</td>
<td>3.7</td>
</tr>
<tr>
<td>Amala’s Pizzeria</td>
<td>Fast Food</td>
<td>Pizza</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Culvers</td>
<td>Fast Food</td>
<td>American</td>
<td>$</td>
<td>4.5</td>
</tr>
<tr>
<td>A&amp;W Restaurant</td>
<td>Fast Food</td>
<td>American</td>
<td>$</td>
<td>4.4</td>
</tr>
<tr>
<td>Happy Wok</td>
<td>Fast Food</td>
<td>Chinese</td>
<td>$</td>
<td>4.2</td>
</tr>
<tr>
<td>Abameres El Primo</td>
<td>Fast Food</td>
<td>Mexican</td>
<td>$</td>
<td>4.7</td>
</tr>
<tr>
<td>Pizza Pit</td>
<td>Fast Food</td>
<td>Pizza</td>
<td>$</td>
<td>3.9</td>
</tr>
<tr>
<td>Noodlers and Company</td>
<td>Fast Food</td>
<td>International</td>
<td>$</td>
<td>3.7</td>
</tr>
<tr>
<td>Milli’s Sandwiches</td>
<td>Fast Food</td>
<td>Sandwich</td>
<td>$</td>
<td>4.1</td>
</tr>
</tbody>
</table>

Source: Various
Local Retail & Restaurant Supply

The map to the right shows the location of the retail and restaurant hubs in the city of Sun Prairie. As you can see, many of the offerings are centered along Highway 151, which runs directly though the city of Sun Prairie.

For its size, the city of Sun Prairie has a strong supply of retail and restaurant options.
Prairie Lakes

Size: 120-acre master planned retail

Retail: 890,000 square feet

Prairie Lakes Shopping Center is located on the southwest end of Sun Prairie on Highway 151 at the S Grand Ave exit. The shopping center is anchored by several major retailers including Costco, Target, Cabela’s, and Marcus Theaters. Prairie Lakes contains a well diversified mix of other retailers, which makes it a popular destination for residents of Sun Prairie and those passing through on their way to Madison.

The shopping center has excellent access via Highway 151 and I-90, which is less than one mile away. This highway interchange connects Sun Prairie and the shopping center to the rest of the state of Wisconsin providing significant foot traffic for the center.
HSP interviewed representatives from the development company of Prairie Lakes, Sun Prairie’s premier shopping, dining, and entertainment district, to understand the local retail market and propose potential unmet needs of the city. This interview indicated the following:

- Lease rates on the west side of Sun Prairie range from $25 per square foot to $35 per square foot. These rates are less of a function of the quality of tenant but more of a function of construction cost for a quality building in the area.
- Retail developments located downtown, in older buildings, may potentially be able to offer lower lease rates.
- New, well-built construction commands a premium on lease rates when large anchor tenants generate a lot of trips.
- In recent years there has been significant discussion on a large sports complex. The most logical place is just south of Prairie Lakes where the city of Madison has 200+ acres of green space. The advantages of this location are:
  - All major highways from surrounding areas and states converge approximately 1 mile away
  - Proximity to regional airport
  - Hotel, theater, dining, and retail within walking distance
  - Potential combined effort between Sun Prairie and Madison Parks to create a large complex that benefits both areas
HSP analyzed data, from Placer.ai, on the most visited shopping centers in Wisconsin in 2019. This analysis helped determine how impactful the Prairie Lakes Shopping Area is for the Sun Prairie area.

Prairie Lakes ranked second on this list with more than eight million visits in 2019. Prairie Lakes captures a significant amount of demand due to their interstate location. This further emphasizes the potential for a new, unique tourism asset in Sun Prairie to capture interstate demand.

### Most Visited Shopping Centers in Wisconsin

<table>
<thead>
<tr>
<th>Rank</th>
<th>Name</th>
<th>Visits</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mayfair</td>
<td>9,775,707</td>
<td>2500 N Mayfair Rd Ste M186, Wauwatosa, WI, United States</td>
</tr>
<tr>
<td>2</td>
<td>Prairie Lakes Shopping Area</td>
<td>8,322,706</td>
<td>2624 Prairie Lakes Dr, Sun Prairie, WI, United States</td>
</tr>
<tr>
<td>3</td>
<td>Fox River Mall</td>
<td>8,229,768</td>
<td>4531 W Wisconsin Ave, Grand Chute, WI, United States</td>
</tr>
<tr>
<td>4</td>
<td>Southridge Mall</td>
<td>6,823,888</td>
<td>5300 S 57th St, Greendale, WI, United States</td>
</tr>
<tr>
<td>5</td>
<td>West Towne Mall</td>
<td>6,159,587</td>
<td>430 S Gammon Rd, Madison, WI, United States</td>
</tr>
<tr>
<td>6</td>
<td>Bay Park Square</td>
<td>5,796,629</td>
<td>755 Willard Dr, Green Bay, WI, United States</td>
</tr>
<tr>
<td>7</td>
<td>East Towne Mall</td>
<td>5,735,474</td>
<td>4505 East Towne Blvd, Madison, WI, United States</td>
</tr>
<tr>
<td>8</td>
<td>Crossroads Commons</td>
<td>5,511,391</td>
<td>1150 Meridian Dr, Plover, WI, United States</td>
</tr>
<tr>
<td>9</td>
<td>Brookfield Square</td>
<td>5,356,897</td>
<td>95 N Moorland Rd, Brookfield, WI, United States</td>
</tr>
<tr>
<td>10</td>
<td>Bayshore Town Center</td>
<td>5,147,395</td>
<td>5600 N. Bayshore Drive, Glendale, WI, United States</td>
</tr>
<tr>
<td>11</td>
<td>Kopps Shopping Center</td>
<td>4,716,487</td>
<td>7631 W Layton Ave, Greenfield, WI, United States</td>
</tr>
<tr>
<td>12</td>
<td>Oakwood Mall</td>
<td>4,209,540</td>
<td>4600 Golf Rd, Eau Claire, WI, United States</td>
</tr>
<tr>
<td>13</td>
<td>The Mayfair Collection</td>
<td>4,217,737</td>
<td>11500 W Burleigh St, Wauwatosa, WI, United States</td>
</tr>
<tr>
<td>14</td>
<td>Pleasant Prairie Premium Outlets</td>
<td>4,196,137</td>
<td>11211 120th Ave Ste 80, Pleasant Prairie, WI, United States</td>
</tr>
<tr>
<td>15</td>
<td>Southgate Marketplace</td>
<td>3,896,015</td>
<td>3415 S. 27th Street, Milwaukee, WI, United States</td>
</tr>
<tr>
<td>16</td>
<td>White Stone Station</td>
<td>3,751,814</td>
<td>N91W15700 FallsPkwy, Menomonee Falls, WI, United States</td>
</tr>
<tr>
<td>17</td>
<td>2440-2470 W Mason St Shopping Center</td>
<td>3,680,980</td>
<td>2440 W Mason St, Green Bay, WI, United States</td>
</tr>
<tr>
<td>18</td>
<td>Hildale</td>
<td>3,565,740</td>
<td>728 N Michale Blvd, Madison, WI, United States</td>
</tr>
<tr>
<td>19</td>
<td>The Shoppes at Fox River</td>
<td>3,556,626</td>
<td>1160 W Sunset Dr, Ste 106, Waukesha, WI, United States</td>
</tr>
<tr>
<td>20</td>
<td>Commerce Street Commercial Area</td>
<td>3,512,443</td>
<td>130 Commerce St, Wisconsin Dells, WI, United States</td>
</tr>
<tr>
<td>21</td>
<td>Outlet At The Dells</td>
<td>3,305,185</td>
<td>150 Gasser Road, PO Box 258, Wisconsin Dells, WI, United States</td>
</tr>
<tr>
<td>22</td>
<td>Indian Trail Plaza</td>
<td>3,211,915</td>
<td>3500 Brumback Blvd, Kenosha, WI, United States</td>
</tr>
<tr>
<td>23</td>
<td>Pine Tree Plaza</td>
<td>3,207,834</td>
<td>3100 Deerfield Dr, Janesville, WI, United States</td>
</tr>
<tr>
<td>24</td>
<td>Deertrace Kohler</td>
<td>3,146,417</td>
<td>4115 State Highway 28, Sheboygan Falls, WI, United States</td>
</tr>
<tr>
<td>25</td>
<td>Calumet Retail Center</td>
<td>3,039,791</td>
<td>3701 E Calumet St, Appleton, WI, United States</td>
</tr>
<tr>
<td>26</td>
<td>Prairie Towne Center</td>
<td>3,034,439</td>
<td>201 Junction Rd, Madison, WI, United States</td>
</tr>
<tr>
<td>27</td>
<td>Delavan Crossings</td>
<td>2,984,245</td>
<td>1819 E Geneva St, Delavan, WI, United States</td>
</tr>
<tr>
<td>28</td>
<td>Gateway Station</td>
<td>2,983,899</td>
<td>1661 Deming Way #154, Middleton, WI, United States</td>
</tr>
<tr>
<td>29</td>
<td>Shoppers World of Brookfield</td>
<td>2,918,960</td>
<td>12625 W Capitol Dr, Brookfield, WI, United States</td>
</tr>
<tr>
<td>30</td>
<td>Shoppes at Prairie Ridge Marketplace</td>
<td>2,872,585</td>
<td>9901 77th St, Pleasant Prairie, WI, United States</td>
</tr>
</tbody>
</table>

Source: Placer.ai
Visitation

HSP analyzed data, from Placer.ai, to better understand the visitation that Prairie Lakes generates every year.

Prairie Lakes had more than one million unique visitors in 2019. Many of these visitors visited more than one time.

Prairie Lakes was the 2nd most visited shopping center in the State of Wisconsin in 2019.
Metro/Regional Visitation

Prairie Lakes is a major visitation driver for the Sun Prairie area. The critical mass of entertainment, big-box retail, and food and beverage offerings attracts strong visitation to Sun Prairie from Madison and the surrounding cities.

Roughly 25% of visitors to Prairie Lakes come from more than 25 miles away.

Locals (visitors that live within 25 miles from Prairie Lakes) visited Prairie Lakes roughly eight times, on average, in 2019, while visitors that live more than 25 miles away visited Prairie Lakes roughly three times, on average, in 2019.

This map shows the visitors, who live more than 25 miles from Prairie Lakes and that visited at least three times in 2019.
Regional Visitation

Prairie Lakes is a major generator of visitation for the Sun Prairie community and thrives off capturing demand from interstate traffic.

Roughly 11% of visits to Prairie Lakes come from over 50 miles away. Prairie Lakes especially draws visitation from the suburbs of Chicago, Minneapolis-St. Paul, and the State of Wisconsin.

<table>
<thead>
<tr>
<th>Estimated Visitation to Prairie Lakes 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor Origin Distance from Prairie Lakes</td>
</tr>
<tr>
<td>ALL visits</td>
</tr>
<tr>
<td>25 miles and beyond</td>
</tr>
<tr>
<td>50 miles and beyond</td>
</tr>
<tr>
<td>165 miles and beyond</td>
</tr>
</tbody>
</table>

Source: Placer.ai
Historical Downtown

The downtown of Sun Prairie has a diverse mix of restaurant and retail. Main Street runs for approximately two miles from its exit on Highway 151 until it reaches the downtown Sun Prairie area. Closer to the highway there is a mix of fast food, big box, and convenience retailers. As Main Street reaches the downtown area there are more boutique shops, bars, and higher-end dining options.

A few notable spots in this area include:

- Full Mile Beer Company & Kitchen
- Beans & Cream Coffeehouse
- Salvatore’s Tomato Pies
- Mezze Mediterranean Grill
Restaurant & Retail Implications

• The location and mixture of restaurant and retail in relation to a community development project can significantly impact its viability.

• The two major nodes of restaurant and retail offerings are located at Prairie Lakes Shopping Center and in downtown Sun Prairie. These nodes tend to split the city into two parts. If a new retail development were to be developed in the downtown area, it would need to be an experiential or high-quality offering that pulls visitors off the highway and into the downtown.

• Given Sun Prairie’s proximity to Madison, the city must differentiate its restaurant and retail offerings to attract new visitors and spur growth in the area.

• Depending on the location of development, retail and restaurant offerings can take multiple forms and be adapted to be major anchors of new development or ancillary pieces of a larger mixed-use development.

• For its size, Sun Prairie has a strong supply of restaurant and retail offerings. However, the area is lacking more quality dining options, such as a healthy fast-casual outlet or an upscale casual dining offerings.

• Critical mass of options, such as retail and food and beverage options drives visitation. If you don’t offer a critical mass of options, you could be turning away potential overnight stays.
Adult Beverage
Adult Beverage Experiences

Throughout Wisconsin and concentrated in the Madison MSA, adult beverage experiences are driving tourism and providing residents with leisure opportunities.

Wineries, breweries and distilleries are tourism staples and account for a notable share of the tourism traffic in and around Madison. These types of attractions could be an attractive addition to the tourism market in Sun Prairie.

- **Beer tourism** in on the rise, and relative to wine tourism, is a new trend that has gained popularity over the last five years. Brewery experiences are often paired with recreational activities, live concerts, and fine-dining.

- **Craft distillery tourism** is also on the rise, though spirits movement still lags local wine or beer. This is due, in part, to the fact that it is still illegal to distill at home, which means honing the hobby before going pro is a major challenge. As a result, fewer start-ups are entering the market.

- **Successful adult beverage destinations need additional programming.** Trivia nights, music, and games all provide added value to brewery customers and enhance the experience.
Adult Beverage Experiences

HSP identified 30 adult beverage experiences within the Madison MSA. The vast majority (22) are breweries, while distilleries and wineries count four each. As shown, five out of six of the adult beverage experiences are located within Madison itself, representing a critical mass of options.

Sun Prairie has joined the scene with two breweries in recent years, as well: Right Bauer Brewing and Full Mile Beer Co. & Kitchen. Sun Prairie also has Eddie’s Alehouse and Eatery, which while not a brewery does offer a wide variety of Wisconsin and nationwide craft beers.
Adult Beverage Experiences

The Greater Madison area has an abundant supply of breweries and there are two located in Sun Prairie. While this abundant supply would suggest to not develop another brewery in Sun Prairie, it presents the potential opportunity of creating a “brewery tour” type event across the metro.

Craft distillery tourism has experienced tremendous growth throughout the country, in terms of popularity, over the recent years. There are only four distilleries in the Madison metro. A distillery development in downtown Sun Prairie could capture unmet demand and drive visitation to the area.
Right Bauer Brewing, near the intersection of Main and Market Streets in Sun Prairie, opened in October 2018, which marked Sun Prairie’s entrance into Madison’s adult beverage experience market. The euchre-themed brewery was founded by five co-owners.

Right Bauer has a constantly rotating menu of in-house and guest brews on tap. They also serve a selection of staple cocktails. On the culinary side of things, Right Bauer offers southern-style smoked barbeque.
Full Mile Beer Co. & Kitchen

Opened in late 2018, Full Mile Beer Co. & Kitchen was the second brewery to open in downtown Sun Prairie. As of August 27, 2020, it is also the first brewery featured on the Destination Madison website when viewing the “Breweries” page.

The menu includes brunch, lunch and dinner with elevated (mostly) American fare. Full Mile also offers 13 of their in-house brews on top with a few bottled craft selections from other breweries, as well as many premium liquors and a handful of wines.
Adult Beverage Feedback & Implications

- All ages taprooms and dog-friendly spaces increase access for young families. Many breweries have recognized that the craft beer market is largely made up of young professionals and their new families. Catering specifically to these groups by making establishments family friendly is an important aspect of the craft beer culture.

- Successful projects need additional programming. Trivia nights, music and games all provide added value for customers and enhance the experience.

- Microbreweries are more successful when clustered. Places like Napa Valley and the Kentucky Bourbon Trail display the power of clustering and marketing adult beverage experiences on a national and international scale. Locally, as the cluster of breweries has developed in Madison, breweries have noticed an uptick in visitation despite the increased number of competitors.

- Destination experiences are gaining popularity, but similar efforts are now being taken by individual brands and projects to capture brand-loyal consumers and enthusiasts. For example, distilleries in Kentucky are adding lodging to their distillery campuses and many mid-sized breweries are opening their own concept hotels.

- Some brewery destinations are being planned by cities themselves. The City of Madras, Oregon recently released a request for proposals from breweries interested in developing a destination development in their downtown revitalization district, and other cities are following suit.
Recreation, Park, Nature-Oriented
Nature-Oriented assets can play a major role in enhancing city’s quality of life and provide visitors with an array of pre- and post-event activities. HSP believes that the increased utilization or active promotion of the following two nature assets would positively affect tourism and quality of life in Sun Prairie.

**Sheehan Park:** Sheehan Park is at 240-acre park located close to downtown Sun Prairie and is the largest park owned by the city. The park has a number of recreational activities for residents including picnicking, baseball, softball, basketball, hiking, and environment enjoyment. HSP believes that Sheehan Park has the most opportunity out of Sun Prairie’s nature-oriented assets, in terms of marketing potential, for the City to increase promotion.

**Patrick Marsh Nature Preserve:** Patrick Marsh is located just north of the city of Sun Prairie and is a 340-acre nature preserve that is owned and managed by the Wisconsin DNR, City of Sun Prairie and Groundswell Conservancy.
Nature-Oriented Feedback & Implications

- Nature-Oriented assets can enhance a community’s quality of life and if unique enough, drive visitation to a community, and if unique and large enough, generate overnight stays for a community. However, HSP does not believe that the City of Sun Prairie’s focus should be on enhancing their current supply of nature-oriented assets.

- The current supply of nature-oriented assets in Sun Prairie needs to be promoted better by the City. These attractions should be promoted along with other major attractions and major events.

- Simple, minor enhancements of nature-oriented assets in Sun Prairie could potentially generate new areas for community events or recreation events.

- The stretching of walking trails/biking trails into or the development of new trails in/around the downtown Sun Prairie area would help grow the downtown Sun Prairie area. Current bike routes and trail systems in Sun Prairie have continually improved over the last several years, but still lack connectivity.
Waterpark/Theme park
Regional Waterpark / Theme Park Supply

The supply of waterparks and theme parks is minimal within 50 miles of Sun Prairie. The two local facilities include PAC Dolphins Cove and Little Americka Amusement Park.

The adjacent table organizes these facilities by distance from Sun Prairie and details each feature that these parks provide.

The lack of large, quality facilities within a 50-mile radius from Sun Prairie creates an opportunity to capture unmet demand in the local and regional area.

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Type of Attraction</th>
<th>Location</th>
<th>Distance from Sun Prairie (miles)</th>
<th># Slides</th>
<th># of Rides</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAC Dolphins Cove</td>
<td>Waterpark / Athletic Club</td>
<td>Sun Prairie, WI</td>
<td>2</td>
<td>5</td>
<td></td>
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<tr>
<td>Little Americka Amusement Park</td>
<td>Amusement Park</td>
<td>Marshall, WI</td>
<td>11</td>
<td>24</td>
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<tr>
<td>Knuckkeheads Trampoline Park Rides And Bowling</td>
<td>Amusement Park</td>
<td>Wisconsin Dells, WI</td>
<td>51</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Wildemess Resort</td>
<td>Resort / Waterpark</td>
<td>Wisconsin Dells, WI</td>
<td>52</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Great Wolf Lodge - Wisconsin Dells</td>
<td>Resort / Waterpark</td>
<td>Wisconsin Dells, WI</td>
<td>52</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Kalahari Resorts Dells</td>
<td>Resort / Waterpark / Theme Park</td>
<td>Wisconsin Dells, WI</td>
<td>52</td>
<td>20</td>
<td>13</td>
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<td>Timbavati Wildlife Park</td>
<td>Theme Park</td>
<td>Wisconsin Dells, WI</td>
<td>53</td>
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<td>Springs Water Park at The Ingleside Hotel</td>
<td>Waterpark</td>
<td>Waukesha, WI</td>
<td>54</td>
<td>3</td>
<td></td>
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<td>Atlantis Hotel &amp; Family Waterpark</td>
<td>Resort / Waterpark</td>
<td>Wisconsin Dells, WI</td>
<td>55</td>
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<td>Noah's Ark Waterpark</td>
<td>Water Park</td>
<td>Wisconsin Dells, WI</td>
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<td>Mt. Olympus</td>
<td>Resort / Waterpark / Theme Park</td>
<td>Wisconsin Dells, WI</td>
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<td>18</td>
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<tr>
<td>Chula Vista Resort, Trademark Collection by Wyndham</td>
<td>Resort / Waterpark / Theme Park</td>
<td>Wisconsin Dells, WI</td>
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<td>1</td>
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<td>Pollock Community Water Park</td>
<td>Waterpark</td>
<td>Oshkosh, WI</td>
<td>73</td>
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<tr>
<td>Six Flags Hurricane Harbor Rockford</td>
<td>Waterpark</td>
<td>Cherry Valley, IL</td>
<td>77</td>
<td>7</td>
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<tr>
<td>America's Action Territory</td>
<td>Amusement Park</td>
<td>Kenosha, WI</td>
<td>100</td>
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<td>4</td>
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<tr>
<td>Blue Harbor Resort / Breaker Bay Waterpark</td>
<td>Waterpark</td>
<td>Sheboygan, WI</td>
<td>102</td>
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<tr>
<td>Bristol Renaissance Faire (seasonal)</td>
<td>Theme Park</td>
<td>Kenosha, WI</td>
<td>108</td>
<td></td>
<td>N/A</td>
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<tr>
<td>Santa's Village Azosment &amp; Water Park</td>
<td>Water Park / Theme Park</td>
<td>Dundee, IL</td>
<td>118</td>
<td>10</td>
<td>22</td>
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<tr>
<td>The Water Works</td>
<td>Waterpark</td>
<td>Schaumburg, IL</td>
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<td>Bay Beach Amusement Park</td>
<td>Amusement Park</td>
<td>Green Bay, WI</td>
<td>130</td>
<td></td>
<td>23</td>
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<tr>
<td>Great Wolf Lodge - Chicago / Gurnee</td>
<td>Resort / Waterpark</td>
<td>Gurnee, IL</td>
<td>130</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Six Flags Great America</td>
<td>Waterpark / Amusement Park</td>
<td>Gurnee, IL</td>
<td>130</td>
<td>16</td>
<td>47</td>
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<tr>
<td>Logger's Landing Indoor Waterpark</td>
<td>Waterpark</td>
<td>Rothschild, WI</td>
<td>132</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Rainbow Falls Waterpark</td>
<td>Waterpark</td>
<td>Village, IL</td>
<td>132</td>
<td>6</td>
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<tr>
<td>Raging Waves</td>
<td>Waterpark</td>
<td>Yorkville, IL</td>
<td>137</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Paradise Bay Water Park</td>
<td>Waterpark / Athletic Club</td>
<td>Lombard, IL</td>
<td>141</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Pirate's Cay Indoor Water Park</td>
<td>Waterpark</td>
<td>Sheridan, IL</td>
<td>145</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Grand Bear Resort Waterpark</td>
<td>Resort / Waterpark</td>
<td>Utica, IL</td>
<td>146</td>
<td>4</td>
<td></td>
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<tr>
<td>Odyssey Fun World</td>
<td>Amusement Park</td>
<td>Tinley Park, IL</td>
<td>175</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action City / Chaos Waterpark</td>
<td>Water Park / Theme Park</td>
<td>Eau Claire, WI</td>
<td>176</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Lost Island Water Park</td>
<td>Waterpark</td>
<td>Waterboro, IA</td>
<td>199</td>
<td></td>
<td>11</td>
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<tr>
<td>Wakanda Water Park</td>
<td>Waterpark</td>
<td>Menomonie, WI</td>
<td>203</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Source: Various Facility Websites, HSP
Sun Prairie Family Aquatic Center

The Sun Prairie Family Aquatic Center is a public water park that opened on May 30, 1992. It is only open in the summer. Some amenities offered by the facility include a 210-foot water slide, two kiddie slides, an 18-foot drop slide, two diving boards, water basketball, eight lane competitive area, sand playground two sand volleyball courts, a concession stand, and a bathhouse with coin-operated lockers.

The facility also offers swim lessons and open swim times. A few teams that use the aquatic center include the Tri-County Swim League, Piranhas Swim Team and Piranhas Mini Team. The Sun Prairie Family Aquatic Center did not open during the summer of 2020 due to COVID-19.

HSP to conduct additional interviews of stakeholders and aquatic center management, in a future phase of work, to better understand the impact a re-developed aquatic center would have on the Sun Prairie community.
Industry Implications – Waterpark / Theme Park

HSP interviewed experts in the waterpark and theme park industry to better understand how a waterpark/theme park development would potentially benefit the City of Sun Prairie. Key findings from these interviews are listed below:

• The Sun Prairie and Madison Metropolitan area provides an opportunity for a waterpark/theme park development due to the deficit of quality supply within a 50-mile radius of Sun Prairie and the strong accessibility, due to numerous interstates and highways.

• It is crucial to consider the governance structure when deciding on how to operate/own a commercial waterpark. Many ways to develop, own, and operate waterpark facilities and theme parks exist. Experts believe that either privately owned/operated or publicly owned/operated are the most successful types, but a combination of both is when challenges arise. Initial build costs for private waterparks range from $15 to $30 million, while costs for municipal waterparks/aquatic centers range from $10 to $15 million.

• Attendance at outdoor waterparks is key, as more than 30% of the revenue made by these parks is from gate fees. Annual projected attendance by acreage is as follows:
  • 4-acre park – 60,000 to 75,000
  • 8-acre park – 150,000
  • 16-acre park – 200,000 to 250,000

• Consider sizing and related costs. If the site of any proposed waterpark or theme park does not have market draw, the facility will increase expenses, but not revenues. Contrarily, too small a park may not have the amenities to attract a large segment of the population. Outside of construction costs, the most common pitfall is that the operating costs are underestimated.

• Support Spaces. Planning for proper support facilities like concessions, restrooms and other public gathering areas are as essential to the design of the park as the entertainment elements themselves.
3

Peer Cities Case Studies

Differentiating Factors
Peer Cities Overview

HSP identified six peer cities, based on city population, proximity to a major MSA, quality of life, and major attractions and events, that have bolstered their tourism attractions and events in recent years.

HSP profiled the major events and attractions that these peer cities have, to better understand how a city like Sun Prairie can enhance their current events and attractions and develop new events and attractions that bring tourism to the area. Having a major MSA population can be a benefit for a smaller, neighboring city.

### Peer Cities Summary

<table>
<thead>
<tr>
<th>Location</th>
<th>Major MSA</th>
<th>City Population</th>
<th>Median Household Income</th>
<th>MSA Population</th>
<th>City Pop as % of MSA Pop</th>
<th>Population within a 3-hour drive time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valparaiso, IN</td>
<td>Chicago</td>
<td>34,342</td>
<td>$53,240</td>
<td>9,578,424</td>
<td>0.4%</td>
<td>20,187,638</td>
</tr>
<tr>
<td>Northfield, MN</td>
<td>Minneapolis</td>
<td>20,968</td>
<td>$63,621</td>
<td>3,678,099</td>
<td>0.6%</td>
<td>6,461,078</td>
</tr>
<tr>
<td>Dublin, OH</td>
<td>Columbus</td>
<td>49,161</td>
<td>$124,952</td>
<td>2,126,001</td>
<td>2.3%</td>
<td>17,102,440</td>
</tr>
<tr>
<td>Westfield, IN</td>
<td>Indianapolis</td>
<td>45,752</td>
<td>$101,203</td>
<td>2,001,742</td>
<td>2.3%</td>
<td>15,909,519</td>
</tr>
<tr>
<td>Fishers, IN</td>
<td>Indianapolis</td>
<td>99,287</td>
<td>$106,399</td>
<td>2,089,486</td>
<td>4.8%</td>
<td>16,396,719</td>
</tr>
<tr>
<td>Franklin, TN</td>
<td>Nashville</td>
<td>85,994</td>
<td>$103,139</td>
<td>2,001,742</td>
<td>4.3%</td>
<td>8,786,992</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td></td>
<td><strong>55,917</strong></td>
<td><strong>$92,092</strong></td>
<td><strong>3,579,249</strong></td>
<td><strong>2.4%</strong></td>
<td><strong>14,140,731</strong></td>
</tr>
<tr>
<td><strong>Sun Prairie, WI</strong></td>
<td>Madison</td>
<td><strong>35,460</strong></td>
<td><strong>$74,176</strong></td>
<td><strong>677,926</strong></td>
<td><strong>5.2%</strong></td>
<td><strong>15,592,795</strong></td>
</tr>
</tbody>
</table>

Source: Various Sources, Esri, HSP
Peer Cities

Valparaiso, IN
Westfield, IN
Fishers, IN
Franklin, TN
Northfield, MN
Dublin, OH
Valparaiso, IN

Major MSA: Chicago
City Population: 34,342

Major Attractions:
- Valparaiso University
- Gabis Arboretum
- Four Fathers Brewing
- Anderson & Vineyard Winery
- 49er Drive-In Theatre

Major Events:
- Popcorn Festival
- Summer Rhapsody Festival
- Valpo Brewfest
- Central Park Plaza Market
- Holly Days

Key Takeaways: Valparaiso, Indiana is roughly 50 miles to downtown Chicago and is well-known for Valparaiso University and their annual Popcorn Fest. Valparaiso has a strong mix of events for all ages and an array of entertainment and recreation attractions.
Popcorn Fest

Popcorn Fest is a 1-day festival held annually in downtown Valparaiso on the first Saturday in September. This festival has been around since since 1979 and is a major driver of tourism to the Valparaiso area. This event takes up 15 blocks of closed-off streets throughout downtown Valparaiso.

This event event is successful due to its strong theme, ties to history, number of ancillary events, and the overall organization of the event.

Key Attributes:
- Two concert stages
- The Popcorn Panic (5-mile run)
- Mechanical rides
- 250 art vendors
- 30+ food booths
Metro/Regional Visitation

The majority of visitation to Valparaiso’s Popcorn Fest, comes from within 20 miles from the event site.

Roughly 25% of visits to Popcorn Fest come from over 20 miles. Popcorn Fest draws visitation from the suburbs of Chicago and Indianapolis.

<table>
<thead>
<tr>
<th>Visitor Origins by Distance from Site</th>
<th>Minimum of One Visit</th>
<th>Minimum of Two Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Est. Number of Visits</td>
<td>% of Total Visits</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
<td>39,200</td>
<td>74.1%</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
<td>13,600</td>
<td>25.7%</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
<td>3,900</td>
<td>7.4%</td>
</tr>
<tr>
<td>Total Visits</td>
<td>52,900</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

|                                      | Est. Number of Customers | % of Total Customers |
| Locals - Within 20 miles             | 39,200                   | 74.1%                |
| Regional & Long Distance - Over 20 miles | 13,600           | 25.7%                |
| Long Distance only - Over 75 miles  | 3,900                    | 7.4%                 |
| Total Visits                         | 52,900                   | 100.0%               |
Regional Visitation

While majority of the visitors to Popcorn Fest came from under 100 miles from downtown Valparaiso, these annual festivals go a long way towards improving the quality of life in the area, and has become the backbone (along with Valparaiso University) of NW Indiana’s community.

<table>
<thead>
<tr>
<th>Visitor Origins by Distance from Site</th>
<th>Estimated Percent staying in local hotels</th>
<th>Estimated number of visitors staying in area hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Immediately Prior to Visit</td>
<td>Immediately Following Visit</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
<td>0.6%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
<td>1.7%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
<td>5.3%</td>
<td>4.7%</td>
</tr>
<tr>
<td>All Visits from Any Distance</td>
<td>1.2%</td>
<td>1.4%</td>
</tr>
</tbody>
</table>
Downtown Valparaiso

The city of Valparaiso has done an amazing job drawing in the surrounding community to the historic downtown with its mixture of retail and dining options as well as community-oriented assets such as central park plaza with its outdoor amphitheater and outdoor ice rink.

Additionally, Valparaiso has its own events website where all the city events are posted along with directories of the different offerings that can be found in the city for shopping and dining.

The city’s diverse array of options when it comes to arts and entertainment make it a destination for people from surrounding cities in the northern Indiana region as well as southern Michigan.
Downtown Valparaiso has a strong community feel with an array of entertainment, restaurant, and retail offerings.

Roughly 22% of visits to downtown Valparaiso come from over 20 miles. Downtown Valparaiso attracts visitation from the suburbs of Chicago and Indianapolis.
Downtown Valparaiso has a variety of entertainment offerings, restaurant/retail outlets, and unique events that produce a regional attraction. These offerings produce overnight stays for the Valparaiso area.

Roughly 30,000 visitors to downtown Valparaiso also chose to stay overnight in the Valparaiso area in 2019.
Dublin, OH

Major MSA: Columbus
City Population: 49,161

Major Attractions:
- Historic downtown
- Muirfield Village Golf Club
- Bridge Park
- The Dublin Arts Center Gallery
- The Mall at Tuttle Crossing

Major Events:
- Irish Fest
- Memorial Golf Tournament
- Fore!Fest
- Dublin Market
- St. Patrick’s Day Parade

Key Takeaways: Dublin, Ohio is roughly 15 miles from downtown Columbus and is well-known for its historic downtown and the PGA Tour Memorial Golf Tournament. Dublin is a city that has strong accessibility with bridges, bike paths, and walking paths.
Irish Fest

The Irish Fest, held annually in Dublin, OH on the first weekend in August, attracts more than 100,000 guests into the Dublin area. The festival is the largest three-day Irish Festival in the world. Irish Fest takes place at the 105-acre Coffman Park.

Key Attributes:

- 7 concert stages for 65 musical acts
- Irish Cultural Activities
- ~100 retail vendors and food trucks
- Mezze Mediterranean Grill
Regional Visitation

The Irish Fest attracted nearly 113,000 visitors to Dublin throughout the 3-day event in 2019. While majority of the visitors came from under 20 miles from Coffman Park, roughly 17% came from over 75 miles and this event generated visitation from the northeast and mid-south.

The event attracts roughly 14,000 people people from outside of the Columbus metro area.
Visitation

In 2019, the Irish Fest attracted more than 112,000 visitors to the Dublin area. Total visitation on Saturday of the event pushed to more than 55,000.

The festival mainly draws from local/metro areas surrounding Dublin. Roughly 80% of visitors to the festival come from under 50 miles away.

The bottom figure shows the household incomes of the visitors to the festival in 2019. Majority of visitors have household incomes that range from $50,000 to $100,000 per year.
Westfield, IN

Major MSA: Indianapolis
City Population: 45,752

Major Attractions:
- Grand Park
- Monon Trail
- Cool Creek Park Nature Center
- Westfield Playhouse

Major Events:
- Westfield Rocks the Fourth
- Amigos de Westfield
- Indianapolis Colts Training Camp
- Westfield in Lights

Key Takeaways: Westfield, IN is roughly 20 miles north of downtown Indianapolis and is well-known for their major youth sports facility Grand Park. Grand Park has 31 multi-purpose fields, 26 diamonds, and three indoor facilities. Outside of Grand Park, Westfield has a mix of recreation attractions and events for all demographics and ages.
Grand Park

**Location:** Westfield, IN

**Owner:** City of Westfield

**Operator:** Multiple

- 31 outdoor, multipurpose fields
- 26 outdoor diamonds
- 3 indoor facilities
- 370,000-square foot event center (Room for three turf fields)
- 10 points of sale for food and beverage
- Running trails
- Athlete development facility

**Key Takeaways:**

Grand Park is known around the country for being one of the top youth sports facilities. The 400-acre development has a tremendous array of offerings that keep the facility busy year-round and drive economic impact for the City of Westfield.
Local/Regional Visitation

Grand Park attracted more than 5.6 million unique visitors to the Westfield area in 2019. Grand Park mainly draws visitation from the Midwest region, but captures visitation from all over the country for major tournaments.

More than 2.9 million visitors to Grand Park in 2019 came from more than 75 miles away. This visitation led to roughly one million overnight trips.
National Visitation

Grand Park draws visitors to Westfield from all over the U.S. While majority visitors to Grand Park are from the Midwest, this graphic shows that this facility pulls visitors from all over the country.

A major tournament-caliber youth sports park, if run well, can fill hundreds of thousands of room-nights annually, especially if there are indoor and outdoor facilities, and enough of each to have multiple tournaments playing simultaneously.

<table>
<thead>
<tr>
<th>Visitor Origins by Distance from Site</th>
<th>Estimated Percent staying in local hotels</th>
<th>Estimated number of visitors staying in area hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Immediately Prior to Visit</td>
<td>Immediately Following Visit</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
<td>0.3%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
<td>44.7%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
<td>55.7%</td>
<td>33.3%</td>
</tr>
<tr>
<td>All Visits from Any Distance</td>
<td>31.8%</td>
<td>18.7%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Visitation Cont.

Majority of the visitation to Grand Park happens on Friday through Sunday. This is due to the facility being a major youth sports tournament facility.

Grand Park has a strong national reputation as being one of the top youth sports facilities. Roughly 50% of visitors to Grand Park come from more than 100 miles away.

The bottom figure shows the top places that visitors to Grand Park visited pre- and post-event. This emphasizes the importance of having quality lodging close by and sufficient interstate/air access when developing a major youth sports facility.
Northfield, MN

Major MSA: Minneapolis
City Population: 20,968

Major Events/Attractions:
- Outlaw Trail
- Prestigious Colleges
- Loon Liquors
- Northfield Arts Guild
- Red Barn Farm of Northfield

Major Events:
- Defeat of Jesse James Days
- Riverwalk Market Fair
- Bridge Chamber Music Festival

Key Takeaways: Northfield, MN is roughly 44 miles south of downtown Minneapolis. This historic small-town has a variety of recreation attractions is known for the Jesse James Days, a four-day festival that attracts over 100,000 people to Northfield annually.
Jesse James Days – Northfield, MN

Jesse James Days is a multi-day festival located in the city of Northfield, MN. It began as the “Fall Festival” in 1948 with the premier event occurring on Saturday, “Jesse James Day.” It is one of the largest festivals in Minnesota with thousands of visitors coming to see the reenactments of the famous robbery that took place in 1876 at First National Bank on Davidson Street.

Additional events at the Jesse James Days include:

- Championship Rodeo
- Carnival
- Car Show
- Parade
- Horseshoe Hunt
- Arts & Crafts Expositions
- Musical Performances
Metro/Regional Visitation

The Defeat of Jesse James Days mainly draws visitation from the state, but captures major density from the Minneapolis area, roughly 40 miles away from Northfield.

Roughly 90% of visitation to The Defeat of Jesse James Days comes from under 75 miles away. As the map to the right shows, this visitation is heavily focused around the Minneapolis suburbs.

<table>
<thead>
<tr>
<th>Defeat of Jesse James Days - Northfield, MN (downtown street fair)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday - Sunday, Sept 5 - 8, 2019 (4 Days)</td>
</tr>
<tr>
<td>Visitor Origins by Distance from Site</td>
</tr>
<tr>
<td>Colors correspond to charts &amp; maps</td>
</tr>
<tr>
<td>Est. Number of Customers</td>
</tr>
<tr>
<td>-------------------------</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
</tr>
<tr>
<td>Total Visits</td>
</tr>
</tbody>
</table>
Regional Visitation

The Defeat of Jesse James Days has a strong local/metro attendance base. However, this data from Placer.ai only shows the street fair part of the event, and not the ancillary events that take place around the city during these days.

Roughly 1,750 visitors to the Defeat of Jesse James Days also chose to stay overnight in the Northfield area in 2019.

### Estimated Hotel Stays resulting from Generated Visits - Defeat of Jesse James Days - Northfield, MN - 2019

<table>
<thead>
<tr>
<th>Visitor Origins by Distance from Site</th>
<th>Estimated Percent staying in local hotels</th>
<th>Estimated number of visitors staying in area hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Immediately Prior to Visit</td>
<td>Immediately Following Visit</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
<td>0.9%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
<td>7.3%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
<td>16.4%</td>
<td>13.1%</td>
</tr>
<tr>
<td>All Visits from Any Distance</td>
<td>2.6%</td>
<td>2.5%</td>
</tr>
</tbody>
</table>
Visitation Cont.

In 2019, the Defeat of Jesse James Days attracted more than 68,000 visitors to the Northfield area. Total visitation on Saturday of the event pushed to more than 29,600.

As mentioned in previous slides, the festival has a strong local/metro reputation. Roughly 80% of visitors to the festival come from under 30 miles away.

The bottom figure shows the household incomes of the visitors to the festival in 2019. Majority of visitors have household incomes that range from $50,000 to $100,000 per year.
Franklin, TN

**Major MSA:** Nashville

**City Population:** 85,994

**Major Events/Attractions:**
- Franklin Theatre
- Leiper’s Fork Distillery
- Lotz House Museum
- Historic Downtown
- The Factory at Franklin

**Key Takeaways:** Franklin, TN is roughly 20 miles south of downtown Nashville. Franklin, TN is known for its historic landmarks and its 16-block historic downtown.

**Major Events:**
- Main Street Festival
- Pumpkinfest
- Wine Down Main Street
- Kids Arts Festival
Downtown Franklin

Although slightly larger than Sun Prairie, with a total population of 80,000 residents, the city of Franklin contains several similar aspects to that of Sun Prairie. Their historic downtown district is very walkable and hosts several events throughout the year such as the Main Street Festival, Pumpkinfoest and Wine down Main Street. All of these events bring in people for the surrounding area into Franklin and bolster business in the area.

The downtown area is anchored by a centrally located round about with a war memorial inside the inner circle. This makes the downtown area highly conducive for events and festivals.

The historic downtown and all of the amenities that are located there help Franklin differentiate itself from surrounding towns and the greater Nashville metro area.
Metro/Regional Visitation

The downtown Franklin area, including the Factory at Franklin, experiences strong local, metro, and regional visitation. The array of offerings and historic feel of Franklin’s downtown area generates significant annual visitation.

Roughly 70% of visitation to the downtown Franklin area comes from under 75 miles away. As the map to the right shows, this visitation is heavily focused around the Nashville metro and surrounding suburbs.
Regional Visitation

The figure to the right shows the regional visitation that downtown Franklin and the Factory at Franklin generates for the area.

**Roughly 20% of visitors to the Downtown Franklin area, that traveled from over 75 miles ways, also chose to stay overnight in the Franklin area in 2019.**
Visitation Cont.

In 2019, the downtown Franklin area and the Factory at Franklin attracted more than two million unique visitors to the Franklin area.

As mentioned in previous slides, Downtown Franklin attracts significant regional visitation. Roughly 32% of visitors to the area come from over 100 miles away.

The bottom figure shows the household incomes of the visitors to Downtown Franklin in 2019. Majority of visitors have household incomes that range from $50,000 to $125,000 per year.
Fishers, IN

Major MSA: Indianapolis
City Population: 99,287

Major Events/Attractions:
- Conner Prairie
- The Yard at Fishers District
- Four Day Ray Brewing
- The Nickel Plate District
- IKEA
- Topgolf

Major Events:
- Symphony on the Prairie
- Fishers Farmers Market
- Spark!Fishers
- Fishers Blue Fest
- Fishers Art Crawl

Key Takeaways: Fishers, IN is roughly 16 miles north of downtown Indianapolis. Fishers, IN has a walkable downtown and an array of entertainment offerings. Fishers hosts a variety of events and has experienced a rapid growth in mixed-use development lately.
The Yard at Fishers District

The Yard at Fishers District, in Fishers, Indiana, is located approximately 20 miles north of the downtown metropolitan area of Indianapolis. Fishers has witnessed sustained growth in the past decade with several new development projects.

The Yard is a $110 million open-air mixed-use development project with restaurant, retail, and multifamily apartments. The district is food centric with several restaurant and dining options. Additionally, the open-air concept and central plaza allows for community events during all times of the year, such as farmers markets in the summer months and possible Christmas Tree lighting events during winter.

Mixed-use development projects such as this attract people from the surrounding area due to the atmosphere and community feel they create.
Metro/Regional Visitation

The Yard at Fishers District experiences strong visitation from the Indianapolis metro area and surrounding suburbs.

Roughly 22% of visits to the Yard at Fishers District come from over 20 miles away. As the map to the right shows, this visitation is heavily focused from Indianapolis suburbs.

<table>
<thead>
<tr>
<th>Visitor Origins by Distance from Site</th>
<th>Minimum of One Visit</th>
<th>Minimum of Two Visits</th>
<th>Avg. Visits per Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Est. Number of Visits</td>
<td>Percent of Total Visits</td>
<td>Est. Number of Customers</td>
</tr>
<tr>
<td>Locals - Within 20 miles</td>
<td>244,600</td>
<td>77.4%</td>
<td>96,400</td>
</tr>
<tr>
<td>Regional &amp; Long Distance - Over 20 miles</td>
<td>71,400</td>
<td>22.6%</td>
<td>40,200</td>
</tr>
<tr>
<td>Long Distance only - Over 75 miles</td>
<td>41,300</td>
<td>13.1%</td>
<td>23,500</td>
</tr>
<tr>
<td>Total Visits</td>
<td>316,000</td>
<td>100.0%</td>
<td>136,600</td>
</tr>
</tbody>
</table>
Regional Visitation

The critical mass/array of offerings that the Yard at Fishers District has, attracts visitors from many major Midwestern cities.

Roughly 3,800 visitors to the Yard at Fishers District also chose to stay overnight in the Fishers area in 2019.
Visitation Cont.

The Yard at Fishers District began opening various retail and restaurant pieces in September of 2019. The top graphic shows the increase in visitation to the area after the opening.

The middle figure shows the household incomes of the visitors to the Yard within the last six months. Majority of visitors have household incomes that range from $50,000 to $125,000 per year.

The bottom figure shows the customer journey prior/post visit to the Yard. This emphasizes the effect that a large attraction has on surrounding businesses.
Peer Cities Implications

- **Walkable Downtown/Placemaking.** A walkable downtown can be a key driver for tourism for a small city. A downtown that is well connected with pedestrian-friendly paths, sidewalks, and small streets with little car traffic create a comfortable environment. Having attractive streetscapes, green spaces, and public art are minor enhancements that go a long way towards improving a city’s feel. The development of critical mass such as, retail, restaurant and entertainment offerings induces visitors to spend more time in the respective city.

- **Unique Event.** A unique event will drive consistent annual visitation to a small city. It is critical that this event be promoted properly and enhanced year-over-year. A large, unique event could provide a city with ancillary event opportunities and opportunities for local businesses to get involved.

- **Cultural Influence/Theme/Experience.** It is critical that a small city promote their community’s culture and theme throughout the city. This “sense of place” will influence visitation and provide visitors with a strong overall experience when they are there.

- **Major Attraction.** A major attraction, such as Westfield’s Grand Park, is a great way for a small city to get on the map and generate overnight stays. These attractions can take many forms, but are typically large enough to support simultaneous events and have great highway or air access.
Marketing Efforts & Media Analysis

Promoting Sun Prairie
SUN PRAIRIE STRENGTHS

• Marketing appeal as a charming city with established annual events
• Existing assets can be leveraged and repositioned

MISSED OPPORTUNITIES

• Sun Prairie is not highlighted as a tourist attraction
• Visitor information is hard to find
• Events are not receiving regional media coverage
• People and downtown business district can help generate free marketing content
  • Free online 3rd party resources not leveraged
  • Social media engagement
MARKETING GOAL:

Increase overnight stays
MARKETING ANALYSIS
### WEAKNESSES

<table>
<thead>
<tr>
<th>Weakness</th>
<th>Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is no messaging highlighting Sun Prairie as a tourist destination</td>
<td>Messaging to support a “Weekend in Sun Prairie”</td>
</tr>
<tr>
<td>Lacking consistent messaging</td>
<td>Develop a value promise from the city</td>
</tr>
<tr>
<td>Outdated graphics</td>
<td>Graphics, including the logo need to be updated to be fresher and more modern</td>
</tr>
<tr>
<td>Storytelling through video and pictures</td>
<td>Use more imagery from asset library as well as video to help tell the story of Sun Prairie, show its charm and diverse population</td>
</tr>
<tr>
<td>No designated tagline/slogan/motto</td>
<td>Develop the Sun Prairie brand to include a memorable slogan that can be used online and in print</td>
</tr>
<tr>
<td>PR is inconsistent and has limited reach</td>
<td>• Include a boilerplate with every press release. Send event releases out on the newswire, outreach to travel bloggers, news stations</td>
</tr>
<tr>
<td></td>
<td>• Market Sun Prairie to be included in lists about Wisconsin cities to visit</td>
</tr>
</tbody>
</table>
BRANDING AND MESSAGING COMPARISON

CITY OF SUN PRAIRIE, Wisconsin

VS

City of Brighton, Michigan
City of Hamilton County, Indiana
Visit Bothell

Reynoldsburg, Ohio - 1839
Waukee, Iowa
Lehi City

CITY OF VANCOUVER
Greenville, North Carolina
Dublin, Ohio

Find yourself in good company™
ONLINE MARKETING
<table>
<thead>
<tr>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does not highlight the popular annual events</td>
<td>• Break out by having calendar of events, while also having highlights for most popular annual events • Use more imagery with events</td>
</tr>
<tr>
<td>Events page not clearly found in current navigation besides on homepage</td>
<td>Add &quot;Events&quot; into the primary navigation</td>
</tr>
<tr>
<td>Sun Prairie video tour on homepage does not highlight the city's tourist attractions</td>
<td>Create shorter highlight reel to appear on homepage</td>
</tr>
<tr>
<td>Tourism is not highly promoted on current site</td>
<td>• Create separate visitsunprairie.com website for tourism • Create a “Weekend in Sun Prairie” campaign</td>
</tr>
<tr>
<td>Homepage promotes events and &quot;where to stay&quot; for tourism but is lacking all other touch points (attractions, restaurants, arts, etc.)</td>
<td>Highlight more attractions</td>
</tr>
<tr>
<td>Lacking in visuals and photos that are used aren’t high-res</td>
<td>Use more visuals and professional photography from current photo library</td>
</tr>
<tr>
<td>Unclear navigation</td>
<td>Current site is difficult to navigate from a usability standpoint depending on who is accessing and what information they are looking for (i.e. resident, tourist, etc.)</td>
</tr>
<tr>
<td>Google analytics</td>
<td>Setup Google Console for better understanding of search queries and start utilizing goal setting function</td>
</tr>
</tbody>
</table>
Only .24% of your website visitors go to the Visit Sun Prairie page from the homepage.
ENGAGEMENT TOOLS

COMPETITORS WEBSITE

Bothell uses their story of “beginning your next adventure” as a call-to-action to easily search for the information they want.

Peachtree City uses big, bold color blocks to guide visitors where to look based on their interests.
The site is missing the opportunity to help people visualize and plan their visit to Sun Prairie. Begin at Bothell is a great example of how visitors can plan their trip based on interests.
SUN PRAIRIE

Right now, tourism feels like an afterthought on the website. Creating a separate tourism website will allow visitors to be better able to see attractions and plan their visit.

SALEM, MA

Salem has a great campaign creating a “story” based around the user experience.
SUN PRAIRIE

The Sun Prairie video is too long and is hidden below the fold on the visitor’s page. The standard time limit for marketing videos is 2 minutes or less.

HAMLET COUNTY

Fishers, Indiana uses a :45 video on its homepage hero image. The video tells a story while showing their people and what they offer.
Visit Sun Prairie is missing an opportunity to engage with potential visitors and/or put something into the hands of visitors to promote itself as a destination.

**Visit Dublin** offers a free destination guide on their homepage. Users can either request a hard copy or download a digital version.
Sun Prairie needs to tap into resources that are not being used to their maximum capacity in order to **increase brand recognition**. This includes the following (oftentimes, free) resources:
Google, TripAdvisor and Yelp are not showing all of your top sites. More attractions need to be added and visitors and locals need to be encouraged to add reviews.

These sites have good search engine optimization and will be helpful in highlighting Sun Prairie as a tourist destination.
<table>
<thead>
<tr>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need to display more &quot;in season&quot; events and/or activities</td>
<td>Create a monthly adventure where you post one new activity to do in the area every week</td>
</tr>
<tr>
<td>Not leveraging opportunities to attract Madison area tourists</td>
<td>Sun Prairie track for activities/events on the West side of Madison, target using keywords and advertise Sun Prairie as a place to stay and visit during their time in Madison</td>
</tr>
</tbody>
</table>
| Video doesn’t show downtown or highlight all of the main attractions, just quick pictures of each would be effective | • Create a tourism video that is around 2 minutes or less that highlights all of the town’s attractions  
  • Feature more videos in general on FB page |
| No YouTube channel                                                       | Create a YouTube channel and use videos already created to populate the channel. Regularly create highlight videos from area events and use defined hashtags |
| No consistent hashtags                                                   | • Create hashtag #VisitSunPrairie to use on all Instagram and Facebook posts  
  • Define hashtags to be used across social media and on signage at events |
| Inactive Visit Sun Prairie Instagram page                                 | Feature photography in current photo library to help promote the town and attractions |
| Facebook targeting is not defined                                        | Create messaging and parameters depending on audience to expand reach |
SUN PRAIRIE
The Instagram is inactive and doesn’t rely on quality imagery. Little to no engagement with few followers.

DUBLIN, OH
Visit Dublin, OH encourages users’ participation with hashtags, example #SoDublin. Encourages users to post pictures - one picture is selected for their weekly e-newsletter. This turns to good engagement, averaging about 125-300+ likes per post.

ENGAGEMENT TOOLS
INSTAGRAM
ENGAGEMENT TOOLS
FACEBOOK

Facebook pages should have a defined audience.

EXAMPLE:

• “Visit Sun Prairie” should be topics of interests to visitors
• “Downtown Sun Prairie” should be of interest to locals

Right now it’s mixed - information of interest to visitors is sometimes on the downtown page and not on the visitor’s page, information for locals is on the visitor’s page, etc.
SOCIAL MEDIA

YOUTUBE

YouTube channels and videos provide search engine optimization benefits. Videos posted on YouTube can also be used on your website, Facebook and Instagram.

Visit Beloit is a good example of how YouTube can be leveraged properly to help showcase attractions.
ENGAGEMENT TOOLS
EMAIL MARKETING

SUN PRAIRIE

Does not have an email campaign for visitors and/or potential visitors.

VS

BOTHELL, WA

Begin at Bothell is a good example of how a tourism email campaign can help generate excitement for planning their next trip.
PRINT AND ADVERTISING
<table>
<thead>
<tr>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inconsistent look and message</td>
<td>Create brand standards for all Sun Prairie related ads with consistent messages</td>
</tr>
<tr>
<td>Call-to-action to cultivate tourism is missing</td>
<td>E.g. create visitors guide as downloadable link and/or a direct mail piece to those who request it</td>
</tr>
<tr>
<td>Reach of materials has a small radius</td>
<td>Utilize digital ads to broaden geographic reach on platforms such as Facebook and Trip Advisor</td>
</tr>
<tr>
<td>Print materials are not engaging (brochures at visitor centers, etc.)</td>
<td>Convert materials to digital platform to target travel teams, conventions, etc.</td>
</tr>
<tr>
<td>No consistent campaign buy or advertising program</td>
<td>Develop a campaign that leverages frequency and reach to have a meaningful impact</td>
</tr>
</tbody>
</table>
Sun Prairie materials are lacking a cohesive look and feel of branding and key messaging across all materials with no distinct advertising campaign in place.
PRINT AND ADVERTISING COMPARISON

BRYCE CANYON, UT

Visit Bryce Canyon is a good example of an advertising campaign and key messaging rolled out across various mediums.
PRINT AND ADVERTISING
COMPARISON, CON’T

BRYCE CANYON, UT

Visit Bryce Canyon is a good example of an advertising campaign rolled out across various mediums.
Sun Prairie ranks 3 out of 4 in the comparable campaigns provided by Discover Wisconsin. Ultimately, Sun Prairie needs its own short Sun Prairie Highlights reel for video engagement. There is no need to repeat this media buy.
MEDIA / EXPANDING YOUR REACH
MEDIA
TOTAL COVERAGE

This graphic shows the number of media hits with a comparison between 2018 and 2019. We should set a goal to see more coverage peaks during special events. There is not a lot of consistency in the number of coverage year over year (overlooking the media coverage in July of 2018 with the explosion).

BILLBOARD
Average daily traffic reach of 25,000

SUN PRAIRIE STAR
9,060 unique visitors monthly, circulation of 3,000

MADISON.COM
1,325,091 unique visitors monthly
This shows us that there is a lot of potential that is being missed based on the relatively low reach for majority of the year.
3rd party media coverage is primarily focused on Downtown Sun Prairie. Events that could help support the marketing goal of increasing overnight stays receive very limited exposure by comparison.
Once again, more than half of the media coverage is very locally focused. A broader reach is needed to support overnight stays.
SUN PRAIRIE

Images are not high-quality and don’t help tell a story

TASTE OF THE TOWN

Consistent images for a single event across media platforms creates better brand awareness for the public.
EXPAND MARKETING REACH THROUGH SOCIAL MEDIA

Visit Sun Prairie is not regularly engaging with visitor’s that would need an overnight stay.

A digital marketing campaign could attract visitors from other cities. Options for ads include Facebook, Instagram and Google.
STRATEGIC RECOMMENDATIONS
#1

Develop a Sun Prairie tourism brand and tools that support it.
#2

Market to a wider geographic and demographic audience.
#3

Proactively communicate with media and potential tourists.
TACTICAL RECONS & NEXT STEPS

- Develop a Marketing and PR campaign that supports the goal of increasing overnight stays.
- Develop a unified vision for the future and a constant restating of key messages.
- Build a separate branded tourism website.
- Develop a short highlight reel geared toward attracting tourists and consider supporting videos for separate attractions.
- To tap into resources that are not being used to their maximum capacity.
  - PSAs, Every Door Direct, TripAdvisor, Yelp
- Create social media, email and digital ad campaigns directed to visitors.
- Enhance and reposition existing events and community drivers to attract more visitors.
Implications, Priorities & Recommendations

Headlines and Recommendations
How to Capitalize on Strengths?

- Expand Sun Prairie Ice Arena (SPIA) - Demonstrated tournament success suggests opportunity for an impactful expansion
- Renovation/Adaptive Reuse of Angell Park in Multipurpose Event/Entertainment Complex
- Leverage more interstate-oriented attractions
- Develop a unique asset that allows visitors to have a Madison-affinity experience but in SP’s easily-accessible location
- Investigate additional transportation options re: hotels and major events/attractions
- Induce additional walkable restaurant, bar, retail, microbrewery, etc. in downtown (this will differentiate your community from numerous suburban, interstate-oriented areas)
How to Mitigate Weaknesses?

- Create Independent Tourism Website and Social Media Platform
- Create Unique Sun Prairie Brand; Consider Independent Tourism Entity (CVB/DMO separate from City)
- Develop an Indoor/Outdoor Multipurpose Event Center (concerts to conferences)
- Develop an Indoor or Outdoor Tournament Sports Complex
- Revamp Sweet Corn Fest to create impactful multi-day event
- Create “linger-longer” experiences relative to Groundhog Day for impact
- Create events unique to Sun Prairie that thread the needle of the busy calendar
- Angell Park: improve aesthetics and consider as site for additional event facility investment (to be studied in future phase)
- Opportunity: Implementation of a Food & Beverage Tax
Recommended Next Steps

- Engage in a deep dive feasibility study for added sports tournament facilities
- Engage in deep dive feasibility study for an entertainment facility
- Create a signature event to focus efforts and funds on and revamp/enhance existing events. (Reinvent Corn Fest?)
  - Identify and track benchmarks for tourism metrics (event attendance, regional influence, etc)
  - Potentially attract third party event team or promotion team
- Engage in Website and Branding Restructuring Process
HSP analyzed a wide range of potential developments and major events that would bolster tourism to the Sun Prairie community. These assessments were made based off market interviews, the current local, metro, and regional supply, and the room night demand that each development would generate.

HSP believes that events/festivals and youth sports are the two areas that provide Sun Prairie with the most opportunity to induce tourism, with several others with potential.
HSP filtered the opportunity analysis matrix into four specific recommendation categories. These categories were identified as the best possible asset classes to target for new development or re-development aimed at increasing tourism to Sun Prairie. Deeper studies/action steps are recommended for each.
Hunden Strategic Partners is a full-service real estate development advisory practice specializing in destination assets.

With professionals in Chicago, San Diego, Indianapolis and Minneapolis, HSP provides a variety of services for all stages of destination development in:

- Real Estate Market & Financial Feasibility
- Economic, Fiscal & Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
- Research & Statistical Analysis
- Developer Solicitation & Selection

The firm and its principal have performed more than 700 studies over the past 20 years, with more than $4.5 billion in built, successful projects.

For further information about Hunden Strategic Partners, please contact:

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COVID-19
Event & Facility Best Practices
In early June, the Sports Innovation Institute at IUPUI, a partnership between Purdue and Indiana universities in Indianapolis, and the Grand Park Sports Complex in Westfield, Indiana produced a study that detailed the perceived reaction among parents, athletes, coaches, officials, and administrators to COVID-related adaptations to the daily operations of sports facilities and events.

The study was conducted among 10,359 participants across 45 states, representing at least 13 different sports. Approximately 92 percent of the respondents were parents, with an option to select different roles such as coaches (25%), administrators (10%), athletes (9%), and officials (3%). The goal of the study was to better understand how the adjacent listed COVID-related adaptations are perceived by parents, athletes, coaches, and administrators.
Adaptation Results

A Kano Model was utilized to show the pairing of the COVID-related adaptations with differing levels of satisfaction. Each adaptation contained three questions.

1. **Functional Question**: How they feel with the adaptation present.
2. **Dysfunctional Question**: How they feel without the adaptation present.
3. **Importance Question**: How important is it to have the adaptation.

The survey concluded the adjacent results:
Event & Facility Best Practices

HSP has identified the following as being critical to visitor satisfaction:

**Sanitation & Ventilation**
The presence of frequent and visible cleaning, hand sanitizing stations, and professional cleaning crews lead to high levels of satisfaction among visitors. In the Sports Innovative Journal study, 65% of respondents indicated they would pay more in ticket costs or entrance fees to cover the costs of these efforts.

**Social Distancing & Limiting Personal Contact**
Implementing social distancing guidelines between visitors and staff personnel lead to higher levels of satisfaction. When these standards are not present, visitors have been shown to have high levels of dissatisfaction.

**Entry to Those Only Under 65 with No Preexisting Conditions**
Under current circumstances, limiting entry to those under 65 years of age with no preexisting conditions has been shown to be an attractive solution to the reopening of facilities and return of events.

**Health Survey & Temperature Checks**
Health surveys including questions on past travel, recent symptoms, and contact information are a must for entrance to any facility. For increased satisfaction, event and facility operators can implement temperature checks upon entrance.
Non-Critical Event & Facility Changes

NON-CRITICAL TO VISITOR SATISFACTION:

CAPACITY ALTERATIONS TO CERTAIN AREAS
Implementing restrictions and changes on areas of close contact have been shown to illicit an indifferent response, meaning these changes did not impact the overall satisfaction of visitors.

CLOSING FACILITY AMENITIES
The closing of amenities within facilities did not impact the satisfaction levels of visitors. If core essential features remain open such as access to bathrooms, visitors will be satisfied.

ARRIVAL AND DEPARTURE CHANGES
Changing the ways visitors much arrive and depart from facilities to limit congestion and personal conduct was found to be not as important to visitors.
CDC Guidelines

With regard to reopening of facilities, it is imperative for facility and event operators to learn and understand the guidelines presented by the CDC. The adjacent QR code links to the CDC’s guidance for cleaning and disinfection standards as well as countless other resources on the reopening standards for facility reopening.

The guidelines instruct facilities and businesses to:

1. Develop a plan
2. Implement the plan
3. Maintain and Revise the plan
Implications

• All facilities and events must adopt new health and safety guidelines in order to reopen safely.

• The changes that must be present for visitors to feel comfortable returning to these facilities include increased sanitation and ventilation, enacting social distancing guidelines and limiting personal contact, only permitting entry to those under 65 with no preexisting conditions, and providing health surveys and temperature checks upon entrance.

• Visitors are shown to not feel additional satisfaction from capacity alterations to certain areas, the closing of facility amenities, and changes to arrival and departure practices.

• It is imperative that facility and event operators abide by and understand the guidelines set forth by the CDC when it comes to sanitation and best facility practices for reopening.