

# RYAN FIELD REBUILD ECONOMIC IMPACT STUDY

EVANSTON, IL  
SEPTEMBER, 2023



**JOHNSON  
CONSULTING**

# TRANSMITTAL LETTER

September 2023

Re: Ryan Field Rebuild and Economic Impact Study

Dear Luke Stowe, City Manager :

C.H. Johnson Consulting, Inc. (Johnson Consulting) and DESMAN (Consulting Team) are pleased to submit this report to you regarding the economic impact study of regional concerts and events at a rebuilt Ryan Field in Evanston, IL. Pursuant to our engagement, this report fulfills the scope of work outlined in the project proposal submitted by Johnson Consulting to Mr. Zalmezak and Members of the Selection Committee on April 4<sup>th</sup>, 2023.

Johnson Consulting has no responsibility to update this report for events and circumstances occurring after the date of this report. As the ongoing impacts of the global COVID-19 pandemic are still uncertain, this report outlines our assumptions based on experience from previous economic disruptions, but the actual impact will not be known for the foreseeable future. The findings presented herein reflect analyses of primary and secondary sources of information. Johnson Consulting used sources deemed to be reliable but cannot guarantee their accuracy. Moreover, some of the estimates and analyses presented in this study are based on trends and assumptions, which can result in differences between projected results and actual results. Because events and circumstances frequently do not occur as expected, those differences may be material.

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

Sincerely,

**DRAFT**

C.H. Johnson Consulting, Inc.

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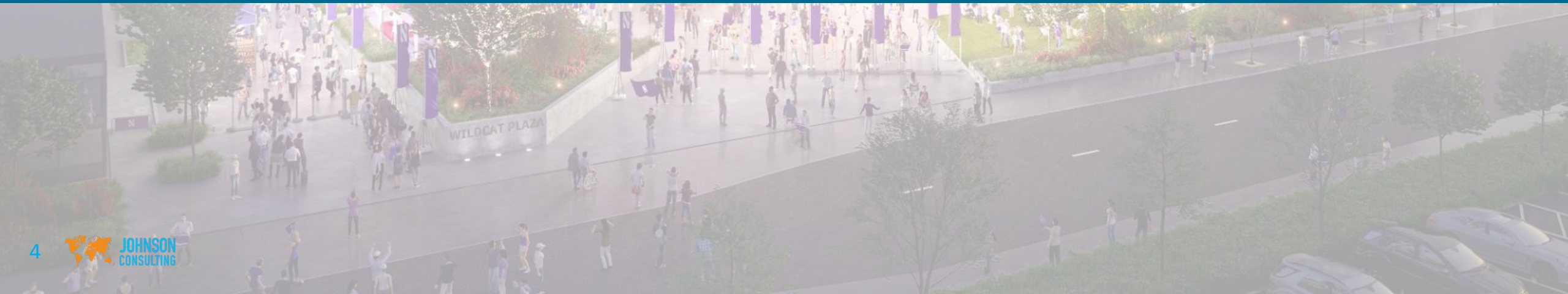
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# SEC 1. INTRODUCTION & EXECUTIVE SUMMARY

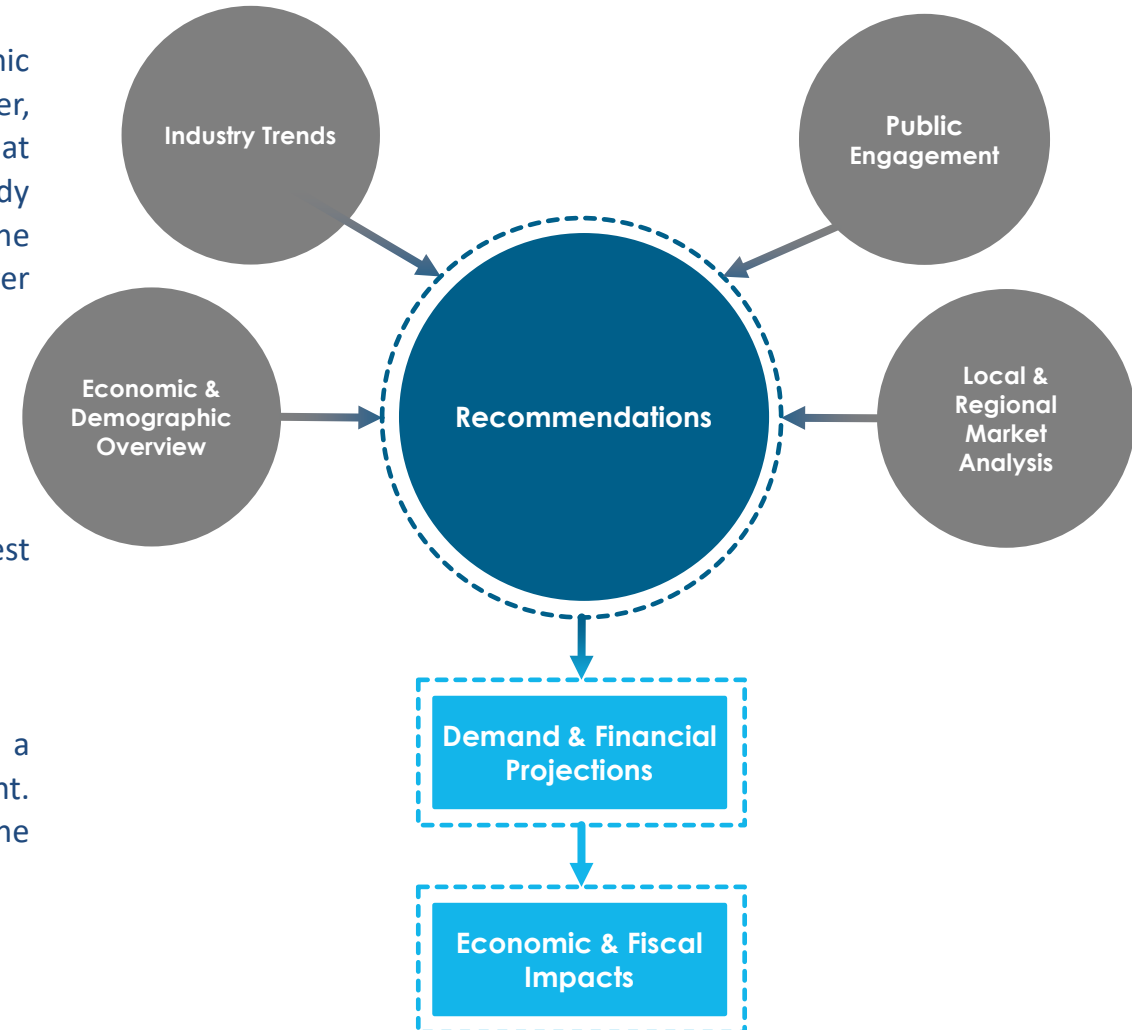


# METHODOLOGY

Johnson Consulting was retained by The City of Evanston to evaluate the economic impacts of a rebuilt Ryan Field and the associated development on the City. Further, Johnson Consulting conducted an analysis on the regional concert and events market that includes event attendee transportation preferences to provide a comprehensive study equipped with a detailed understanding of the economic and environmental impacts the project would have on the community. Broadly, the objective of this study is to answer the following questions:

- What are the key takeaways from previous studies?
- What is the local market's potential capacity to support the project?
- What can broader industry trends and specific case studies offer in terms of best practices for the proposed project?
- What local economic and fiscal impacts could be generated by the project?

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



# PROJECT OVERVIEW



Ryan Field is located in the northeast area of Evanston, IL, home of the Northwestern University Wildcats. Along with a proposed rebuild of Ryan Field that includes plans for overdue upgrades and improvements to the stadium, Northwestern is also proposing to introduce additional concerts and special events to Ryan Field and the adjacent planned public plaza(s) and social spaces. Additional events would require a zoning change, a decision to be made by the City of Evanston. The goal of this report is to provide material to stakeholders in order to inform their decision regarding the zoning change. At the onset of this project, Northwestern had proposed attracting 12 additional events, however, this number has decreased during the production of this report. That said, the fiscal and community impacts of a range of number of events will be evaluated.



## PRIOR WORK & STUDIES – TRIPP UMBACH

The Tripp Umbach Report from November 2022 analyzed the potential economic impact of Northwestern University's goal of renovating Ryan Field. The study identified four main areas of economic impact analysis:

- 1. Rebuild Ryan Field:** Tripp Umbach predicted the construction of the new stadium will generate \$1.3B in economic impact within Cook and Lake counties and \$659.9M specifically within the City of Evanston during the construction period. Tripp Umbach also projected the project will create 2,924 jobs and generate \$1.5M in indirect tax revenue.
- 2. Stadium Operations:** Ryan Field's current operations generate an annual economic impact of \$50.4M for the City of Evanston. It supports 376 jobs and generates \$1.4M in total tax payments. Tripp Umbach predicted if Ryan Field is rebuilt the annual economic impact would increase to \$101.9M, jobs to 827, and total tax payments to \$5.3M in 2031.
- 3. Gameday Visitors Impact:** The presence of Northwestern football games attracts fans, alumni, and visitors who spend money in Evanston. This generates an annual economic impact of \$88.9M within Cook and Lake counties, with \$43.7M specifically in the City of Evanston. Tripp Umbach predicted if Ryan Field is rebuilt the economic impact of Cook/Lake Counties and the City of Evanston would increase to \$106.1M and \$52.2M in 2031.
- 4. Special Events:** Hosting special events at Ryan Field, including concerts and ticketed amateur events, is projected to contribute an additional \$35M in new annual economic impact to Evanston. When combined with football game-day impact, the stadium is expected to generate approximately \$98M in annual economic impact to Evanston post-renovation.

# PRIOR WORK & STUDIES – TRIPP UMBACH

Areas of commentary focus on (i) basis for revenue assumptions, (ii) mid or low-case scenarios, and (iii) the application of induced multipliers. With the objectives to assess whether they within reason and/or whether they share the data, our review is as follows.

(i) Basis for revenue assumptions	Not provided in the Tripp Umbach report. Lack of case study support and absent of relevant historical visitation patterns.
(ii) Mid- or low-case scenarios	Not provided in the Tripp Umbach report. The report provides only one set of findings, without any sensitivity analysis that would result a range of scenarios, e.g., high-, mid-, low-case scenarios; optimistic, baseline, and pessimistic scenarios; etc.
(iii) The application of induced multipliers	The economic impact findings provided in the report reflect the total sum of direct, indirect, and induced impact, combined – without providing any breakdown of the components nor the underlying multiplier assumptions.

In summary, the Tripp Umbach report provides only its top-line findings without sufficient supporting data that would help explain how the analysis arrived at those findings and allow for thorough and careful weighing of evidence and testing of the analysis by the readers. There is a lack of input on negative impacts or cost of the projects such as substitution effect and incremental cost of the new project. Much more information would need to be provided for the readers to be able to assess the reasonableness of the overall analysis and of its analytical components.



## PRIOR WORK & STUDIES – CSL REPORT

A redacted version of the New Ryan Field Third-Party Event Analysis CSL report from July 2023 was provided to the Consulting Team that includes event market and industry trends and analysis of non-ticketed events such as social and meeting events.

- The industry and live event trends are similar to those that are included in our report, outlining the increase in sales and the concert industry in general, as well as types of concert events, and the impacts of the COVID-19 pandemic on the concert and live event industry. Overall, the CSL report identifies the North American concert market is growing, talent costs are increasing, and concert venue operators are increasingly reliant on ancillary revenue sources to generate a profit such as concessions, merchandise, parking, and advertising.
- The CSL report also identifies Chicago as a strong concert and event market and analyzed the top venues in the Chicago market and their associated concert event statistics, illustrating that the Northshore area is underserved, but has access to the full Chicago market.
- The balance of the report summarizes the strengths and challenges of hosting concert events at Ryan Field as well as a table of select Collegiate and NFL stadiums and their demand for non-ticketed events.

# EXECUTIVE SUMMARY

## Role of Ryan Field in the Community

It is not often a stadium is offered to a community with virtually no cost to the host community. This report summarizes the findings of the economic impact of the proposed stadium with three and six concerts. The proposed stadium will remove blight from Central Avenue. The new stadium will be complemented by a park setting and an urban plaza between the stadium and Ryan Arena. A concert has about the same economic contribution as a football game, so if six concerts were held, the experience would be similar to hosting a game, which the community does very well already.

- **Opportunity:** Hotels in Evanston are among the poorest performing in greater Chicagoland. This is due to a structural issue that affects the City- it is distant from the Interstate and people who wish to go to Evanston from the west and south have to generally want to go to the City. Evanston gets little incidental visitors that happen in the community, where a visitor could shop and buy local goods and services. There needs to be demand drivers to pull visitors to Evanston.
- **East Central Street:** East Central Street is not as attractive as West Central Street. There are two major institutional uses on East Central Street- Northshore Hospital and Northwestern Universities. If these institutions leveraged the stadium redevelopment, this street could become much more attractive and activated. The City should strive to induce these institutions to take a proprietary interest in the broader area like Abbott Labs has done in Lake Forest, with their redevelopment of the Deerpath Inn.

# EXECUTIVE SUMMARY

## Key Takeaways

- Attendance and Visitation:** Approximately 429,000 visitors are projected to visit the stadium annually, assuming six concerts. The stadium size will be reduced, so the largest games will be pared back in size- Michigan and Ohio State games.
- Spending, Jobs and Taxes:** The tables below summarize economic and fiscal impacts related to the proposed stadium development. The analysis presents total impact and the impacts captured by all jurisdictions and by the City of Evanston.

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Economic Impact (\$Million)			
	2018*	3-Concerts	6-Concerts
Direct Spending	\$37.7	\$51.7	\$60.4
Indirect Spending	13.9	19.1	22.3
Induced Spending	18.1	24.8	29.0
<b>Total Spending</b>	<b>\$51.6</b>	<b>\$70.8</b>	<b>\$82.8</b>
Increased Earnings	\$18.0	\$24.7	\$28.8
Employment (FTE)	340	470	540

*\*Reflecting historical best between 2015 thru 2019*  
*Source: Johnson Consulting*

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Overall Fiscal Impact (\$Million)			
	2018*	3-Concerts	6-Concerts
Sales Tax (State and Local)	\$3.1	\$3.7	\$4.6
Hotel Occupancy Tax	0.3	0.3	0.3
Amusement Tax	0.0	0.3	0.5
Taxes on athletics tickets	1.6	1.0	1.0
Liquor Consumption Tax	0.1	0.1	0.1
Parking Tax	0.03	0.03	0.04
<b>Total</b>	<b>\$5.0</b>	<b>\$5.5</b>	<b>\$6.6</b>

*\*Reflecting historical best between 2015 thru 2019*  
*Source: Johnson Consulting*

- The costs borne by the City to have the stadium in the community are believed to pale in comparison to the benefits received- notably no debt service and no ongoing operating cost liability. Northwestern has agreed to pay for costs related to the stadium game day expenses. If it is believed by the City that these costs are material, then an analysis of these costs would need to be prepared and submitted to Northwestern. Such a request is reasonable in any Community Benefits Agreement.

# EXECUTIVE SUMMARY

## Key Takeaways

- City of Evanston Economic Impact:** As illustrated in the tables to the right, the historical best economic impact of Ryan Field has been approximately \$47.2 million. The projected economic impact of three and six concerts is approximately \$66.7 and \$77.8 million respectively
- City of Evanston Fiscal Impact:** As illustrated, the historical fiscal impact has been approximately \$2.3 million. The projected fiscal impact for three and six concerts, is approximately \$2.2 and \$2.5 million.
- Tripp & Johnson Comparison:** The table below illustrated the key difference between the two reports.

Annual Total Economic Impact Comparison City of Evanston						
	Tripp Umbach			Johnson Consulting		
Year	Current (2022)	2026	2031	2018*	5-Year Average	
<b># of Concert Events</b>	10	10	10	0	3	6
<b>Economic Impact (millions)</b>	\$50.4	\$97.9	\$101.9	\$47.2	\$66.7	\$77.8
<b>Total Taxes Generated (millions)</b>	\$1.4	\$5.2	\$5.3	\$2.3	\$2.2	\$2.5
<b>Jobs</b>	376	792	827	310	440	510

\*Reflecting historical best between 2015-2019

Source: Tripp Umbach, Johnson Consulting

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Economic Impact within Evanston Only (\$Million)			
	2018*	3-Concerts	6-Concerts
Direct Spending	\$34.4	\$48.7	\$56.8
Indirect Spending	12.7	18.0	21.0
Induced Spending	16.5	23.4	27.3
<b>Total Spending</b>	<b>\$47.2</b>	<b>\$66.7</b>	<b>\$77.8</b>
Increased Earnings	\$16.4	\$23.3	\$27.1
Employment (FTE)	310	440	510

\*Reflecting historical best between 2015 thru 2019  
Source: Johnson Consulting

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Fiscal Impact to City of Evanston Only (\$Million)			
	2018*	3-Concerts	6-Concerts
Sales Tax	\$0.3	\$0.4	\$0.5
Hotel Occupancy Tax	0.3	0.3	0.3
Amusement Tax	0.0	0.3	0.5
Taxes on athletics tickets	1.6	1.0	1.0
Liquor Consumption Tax	0.1	0.1	0.1
Parking Tax	0.03	0.03	0.04
<b>Total</b>	<b>\$2.3</b>	<b>\$2.2</b>	<b>\$2.5</b>

\*Reflecting historical best between 2015 thru 2019  
Source: Johnson Consulting



# EXECUTIVE SUMMARY

## Key Takeaways

- **Parking Study Review:** There are a number of questions that remain unanswered in the transportation analysis. It is recommended that the transportation analysis be revised and a detailed operations plan be offered for a concert event to provide confidence that the attendees can be accommodated successfully.
- **Stakeholder Engagement:** It is likely that restaurants, bars, and hospitality businesses, including hotels, currently and will continue to benefit from events hosted at Ryan Field. It is of note that retail and other service-based business may not benefit to the same degree. Community pushback includes concerns about the impact on quality of life regarding concert events which should be addressed through a Community Benefits Agreement between the City and Northwestern University.
- **Market Analysis:** Existing market conditions and the results of the Placer.AI analytics reveal that Evanston and the greater community would benefit from additional events at Ryan Field along with the proposed rebuild. Increased foot traffic during well-attended football games proved to benefit local businesses, supporting the notion that concerts and other events would also positively impact Evanston businesses. Further, northern Chicagoland has a gap in the market for large-scale venues.

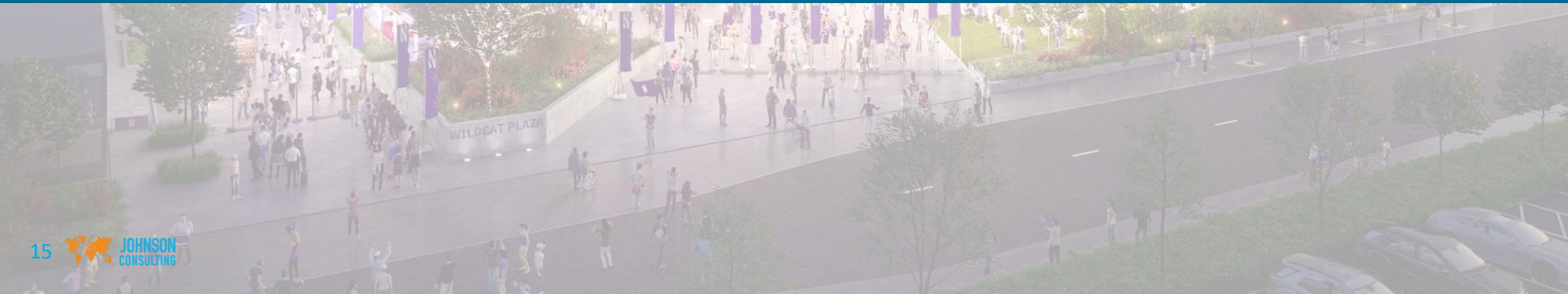
# EXECUTIVE SUMMARY

## Key Takeaways

- **Benchmarking:** Compared to the other schools in the Big 10 Conference, Ryan Field is the smallest and most outdated. If the City desires a new source of revenue as well as an improved community asset, the redeveloped stadium would meet those needs, especially with the additional concerts and special events.
- **Industry Trends:** National trends illustrate the potential for concerts as economic drivers within a community. Further, trends show that venues with multiple uses are the most highly utilized, so programming Ryan Field with events outside of athletics would contribute to activation of Ryan Field and the surrounding areas. It is also key to note the caliber of events that Ryan Field and Evanston will be able to attract being located just outside of the Chicago market and pending the effectiveness of the event management team.



## SEC 2. FINDINGS, PROJECTIONS & IMPACTS

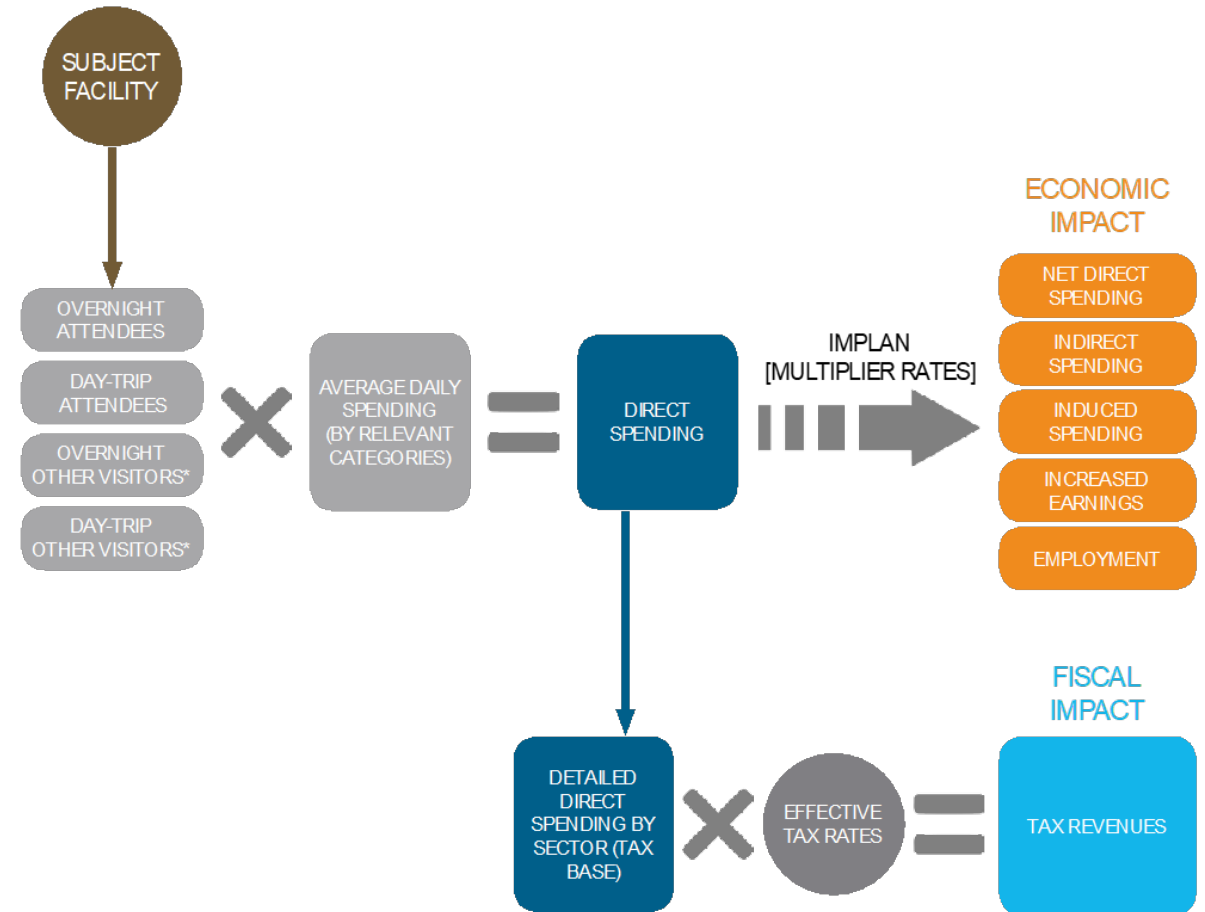


# DEFINITIONS

## Economic and Fiscal Impact Analysis

Economic Impact is defined as incremental new spending in an economy that is the direct result of certain activities, facilities, or events. For the purpose of this analysis, impact totals are discussed in terms of the Evanston economy. The levels of impacts are described as follows:

- **Direct Spending** – spending that occurs as a direct result of the stadium’s operation (example: attendee purchases meal at restaurant nearby)
- **Indirect Spending** – re-spending of the initial direct expenditures on goods and services (example: restaurant purchases more food from supplier)
- **Induced Spending** – changes in local consumption due to the personal spending by employees whose incomes are supported by direct and indirect spending (example: waiter at the restaurant has more personal income to spend)
- **Increased Earnings** – measures increased employee and worker compensation related to the facility’s operation
- **Employment** – measures the number of full-time equivalent (FTE) jobs supported in the local economy as a result of the stadium’s operation
- **Fiscal Impact** – reflects tax revenues to local and state governments that result from the stadium’s operation





# MULTIPLIERS & TAX RATES

## Applicable Multiplier Rates and Tax Rates

The table on the top right summarizes the multiplier rates utilized in the economic impact estimates to calculate indirect spending, induced spending, increased earnings, and employment. These multiplier rates are derived from an IMPLAN input-output model, which is a nationally recognized analytical tool commonly used to estimate economic impacts. An input-output model analyzes the commodities and income that normally flow through various sectors of the economy.

The table on the bottom right summarizes the applicable tax rates utilized in the fiscal impact estimates, focused on major categories of tax revenues that are directly affected by a Ryan Field visitor's activity: sales tax, hotel occupancy tax, amusement tax, taxes on athletic tickets, liquor consumption tax, and parking tax. The table also shows the jurisdictions where the taxes are levied.

Ryan Field, Northwestern University, Evanston, Illinois Economic Impact Multipliers		
Impact	Multiplier	Base
Indirect Spending	0.370	per \$1 of direct spending
Induced Spending	0.480	per \$1 of direct spending
Increased Earnings	0.477	per \$1 of direct spending
Increased Employment (FTE)	9.000	per \$1 million of direct spending

*Source: Implan, Johnson Consulting*

Evanston, Illinois Applicable Tax Rates					
	Tax Rate	State Tax	RTA Tax	County Tax	City Tax
Sales Tax					
State	6.250%	6.250%	-	-	-
Regional Transport Authority	1.000%	-	1.000%	-	-
County	1.750%	-	-	1.750%	-
City	1.250%	-	-	-	1.250%
<b>Sales Tax (State and Local)</b>	<b>10.250%</b>	<b>6.250%</b>	<b>1.000%</b>	<b>1.750%</b>	<b>1.250%</b>
Hotel Occupancy Tax	7.500%	-	-	-	7.500%
Amusement Tax	5.000%	-	-	-	5.000%
Taxes on athletics tickets	12.000%	-	-	-	12.000%*
Liquor Consumption Tax	6.000%	-	-	-	6.000%
Parking Tax	\$0.60*	-	-	-	\$0.60**

\*Comprising Athletic Contests And Exhibitions Tax (3%) and Athletic Contests And Exhibitions Attendance Tax (9%)

\*\*Per parking ticket

*Source: City of Evanston*

# HISTORICAL UTILIZATION

## Economic and Fiscal Impact of Existing Ryan Field

### Event Demand, Visitation, and Room Nights

The table on the right summarizes the historical event demand, visitation, and estimated room nights generated at the existing Ryan Field from 2015 through 2019. The number of events and event spectators are provided by the Northwestern University Athletics. The number of other visitors, non-local vs. local visitors, and room nights are estimated based on the following assumptions:

- **Other Visitors** – include visiting athletes, team officials, etc., and are assumed at 90 to 95 people per game, or approximately 0.25 percent of event spectators
- **Non-Local vs. Local Visitors** – are assumed to be equally distributed (50%-50%) among the event spectators, and 100 percent non-local for the other visitors.
- **Room Nights** – assume to be generated by 25 percent of visitors, at double occupancy for event spectators and single occupancy for other visitors.

As shown, in 2018 (which reflects the best historical year between 2015 and 2019), the seven football games at the existing Ryan Field are estimated to have generated approximately 262,210 visitors and over 33,300 room nights in the region.

Ryan Field, Northwestern University, Evanston, Illinois Capacity: 47,000 Event Demand 2015 thru 2019					
	2015	2016	2017	2018	2019
<b># of Events: Football Games</b>	7	7	7	7	7
<b>Visitors</b>					
Attendees (Event Spectators)	196,814	202,087	209,412	261,556	223,041
Other Visitors*	492	505	524	654	558
<b>Total Visitors</b>	<b>197,306</b>	<b>202,592</b>	<b>209,936</b>	<b>262,210</b>	<b>223,599</b>
Non-Local Visitors	98,899	101,549	105,230	131,432	112,079
Local Visitors	98,407	101,044	104,706	130,778	111,521
<b>Room Nights</b>	<b>25,094</b>	<b>25,766</b>	<b>26,701</b>	<b>33,349</b>	<b>28,438</b>

*\*Including visiting athletes, performers, event participants, team officials, production staff, etc.*  
*Source: Northwestern University Athletics, Johnson Consulting*

# ESTIMATED DIRECT SPEND

## Economic and Fiscal Impact of Existing Ryan Field

### Estimated Direct Spending

The table on the right summarizes the estimated direct spending at the existing Ryan Field from 2015 through 2019. The estimates are based on the assumed average daily spending for non-local and local visitors, also shown, amounting to \$270 and \$70, respectively.

As shown, including facility operation, direct spending at the existing Ryan Field is estimated to have amounted to \$29.5 million in 2015, \$37.7 million in 2018 (historical best), and \$33.4 million in 2019.

Ryan Field, Northwestern University, Evanston, Illinois Capacity: 47,000 Estimated Direct Spending							
	Average Spending (\$/day)		Total Direct Spending (\$000)				
	Non-Local	Local	2015	2016	2017	2018	2019
Lodging	\$141*	\$0	\$3,538	\$3,633	\$3,765	\$4,702	\$4,010
Meals and Incidental Expenses	53	15	6,685	6,864	7,113	8,884	7,576
Tickets	50	50	9,841	10,104	10,471	13,078	11,152
Shopping	26	5	3,096	3,179	3,295	4,115	3,509
<b>Total</b>	<b>\$270</b>	<b>\$70</b>	<b>\$23,160</b>	<b>\$23,781</b>	<b>\$24,643</b>	<b>\$30,779</b>	<b>\$26,246</b>
Facility Operation**			\$6,333	\$6,523	\$6,719	\$6,921	\$7,128
<b>Total</b>			<b>\$29,493</b>	<b>\$30,304</b>	<b>\$31,362</b>	<b>\$37,699</b>	<b>\$33,375</b>

\*Per room night

\*\*Estimated based on more recent budget trends

Source: Johnson Consulting

# HISTORICAL IMPACTS

## Economic and Fiscal Impact of Existing Ryan Field

### Historical Economic and Fiscal Impact

The table on the top right summarizes the estimated economic impact of the existing Ryan Field from 2015 through 2019, by applying the multiplier rates to the estimated direct spending amount. As shown, in 2018, the facility's economic impact is estimated to include \$69.7 million of total spending, \$18.0 million of increased earnings, and 340 jobs.

The table on the bottom right summarizes the estimated fiscal impact of the existing Ryan Field from 2015 through 2019, by applying the applicable tax rates to relevant components of direct spending amount. As shown, in 2018, the facility's fiscal impact is estimated to total \$5.0 million from sales tax, hotel occupancy tax, taxes on athletic tickets, liquor consumption tax, and parking tax.

Ryan Field, Northwestern University, Evanston, Illinois Capacity: 47,000 Estimated Current Economic Impact (\$Million)					
	2015	2016	2017	2018	2019
Direct Spending	\$29.5	\$30.3	\$31.4	\$37.7	\$33.4
Indirect Spending	10.9	11.2	11.6	13.9	12.3
Induced Spending	14.2	14.5	15.0	18.1	16.0
<b>Total Spending</b>	<b>\$54.6</b>	<b>\$56.1</b>	<b>\$58.0</b>	<b>\$69.7</b>	<b>\$61.7</b>
Increased Earnings	\$14.1	\$14.5	\$15.0	\$18.0	\$15.9
Employment (FTE)	270	270	280	340	300

Source: Johnson Consulting

Ryan Field, Northwestern University, Evanston, Illinois Capacity: 47,000 Estimated Current <u>Overall</u> Fiscal Impact (\$Million)					
	2015	2016	2017	2018	2019
Sales Tax (State and Local)	\$2.3	\$2.4	\$2.5	\$3.1	\$2.7
Hotel Occupancy Tax	0.2	0.2	0.2	0.3	0.2
Taxes on athletics tickets	1.2	1.2	1.3	1.6	1.3
Liquor Consumption Tax	0.1	0.1	0.1	0.1	0.1
Parking Tax	0.02	0.02	0.02	0.03	0.02
<b>Total</b>	<b>\$3.8</b>	<b>\$3.9</b>	<b>\$4.0</b>	<b>\$5.0</b>	<b>\$4.3</b>

Source: Johnson Consulting



# PROJECT DEMAND AND SCENARIOS

## Economic and Fiscal Impact of New Ryan Field

### Projected Event Demand

The table on the right summarizes the projected event demand at the new Ryan Field upon renovation. It is expected that the new facility will be able to accommodate other events such as concerts, high school sports, other ticketed events, and catered events. Two scenarios of event calendar are considered: one with three concerts and six concerts. In both scenarios, the number of Football games and other events remain the same.

- **Scenario with three concerts** – includes seven Football games, three concerts, five high school sports, four other ticketed events, and 150 catered events, totaling 169 events, combined.
- **Scenario with six concerts** – includes seven Football games, six concerts, five high school sports, four other ticketed events, and 150 catered events, totaling 172 events, combined.

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Projected Event Demand			
# of Events	2018*	3-Concerts	6-Concerts
Football	7	7	7
Concerts	na	3	6
High School Sports	na	5	5
Other Ticketed Events	na	4	4
Catered Events	na	150	150
<b>Total</b>	<b>7</b>	<b>169</b>	<b>172</b>

*\*Reflecting historical best between 2015 thru 2019*  
*Source: Northwestern University Athletics, Johnson Consulting*

# PROJECTED UTILIZATION

## Economic and Fiscal Impact of New Ryan Field

### Projected Attendance

The table on the right summarizes the projected total visitors at the new Ryan Field upon renovation. The estimates assume different average attendance and percentage of additional visitors for each event type, as shown in the second column of the table.

As shown, event activities at the new facility are projected to generate approximately 346,200 event spectators in the 3-concert Scenario, or 427,200 event spectators in the 6-concert Scenario. When other visitors such as visiting athletes, performers, event participants, team officials, production staff, and others are included, total visitors are projected at approximately 347,502 in the 3-concert Scenario, or approximately 428,907 in the 6-concert Scenario. Both are notably greater than historical visitation to the existing Ryan Field.

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Projected Visitation Statistics				
Event Spectators	Avg Attd	2018*	3-Concerts	6-Concerts
Football	24,600	261,556	172,200	172,200
Concerts	27,000	na	81,000	162,000
High School Sports	7,500	na	37,500	37,500
Other Ticketed Events	7,500	na	30,000	30,000
Catered Events	170	na	25,500	25,500
<b>Total Attendees</b>		<b>261,556</b>	<b>346,200</b>	<b>427,200</b>
Other Visitors**	% Additional	2018	3-Concerts	6-Concerts
Football	0.25%	654	431	431
Concerts	0.50%	na	405	810
High School Sports	0.50%	na	188	188
Other Ticketed Events	0.50%	na	150	150
Catered Events	0.50%	na	128	128
<b>Total Other Visitors</b>		<b>654</b>	<b>1,302</b>	<b>1,707</b>
Total Visitors		2018	3-Concerts	6-Concerts
Football		262,210	172,631	172,631
Concerts		na	81,405	162,810
High School Sports		na	37,688	37,688
Other Ticketed Events		na	30,150	30,150
Catered Events		na	25,628	25,628
<b>GRAND TOTAL VISITORS</b>		<b>262,210</b>	<b>347,502</b>	<b>428,907</b>

\*Reflecting historical best between 2015 thru 2019

\*\*Including visiting athletes, performers, participants, team officials, production staff, etc

Source: Northwestern University Athletics, Johnson Consulting

# PROJECTED ROOM NIGHTS

## Economic and Fiscal Impact of New Ryan Field

### Projected Room Nights

The table on the right summarizes the projected room nights at the new Ryan Field upon renovation. Room nights at the Football events are assumed to be generated by 25 percent of visitors. Room nights at concerts, high school sports, other ticketed events, and catered events are assumed to be generated by 10 percent of visitors. Event spectators are assumed to stay at double occupancy, on average; other visitors, single occupancy.

As shown, the 3-concert Scenario is estimated to generate approximately 31,500 room nights; the 6-concert Scenario, approximately 36,000 room nights.

New Ryan Field, Northwestern University, Evanston, Illinois					
Capacity: 35,000					
Room Night Estimates					
Total Visitors			2018	3-Concerts	6-Concerts
Football			262,210	172,631	172,631
Concerts			0	81,405	162,810
High School Sports			0	37,688	37,688
Other Ticketed Events			0	30,150	30,150
Catered Events			0	25,628	25,628
<b>Total</b>			<b>262,210</b>	<b>347,502</b>	<b>428,907</b>
Room Nights	%*	Occupancy**	2018	3-Concerts	6-Concerts
Football	25%	2.0	33,349	21,956	21,956
Concerts	10%	2.0	0	4,455	8,910
High School Sports	10%	2.0	0	2,063	2,063
Other Ticketed Events	10%	2.0	0	1,650	1,650
Catered Events	10%	2.0	0	1,403	1,403
<b>Total Room Nights</b>			<b>33,349</b>	<b>31,527</b>	<b>35,982</b>

\*Reflecting the assumed percentage of event spectators with room night generating-potential.

\*\*Reflecting the assumed typical room occupancy.

Note: Visiting athletes, coaches, performers, production staff etc are all assumed to generate room nights with a single occupancy.

Source: Northwestern University Athletics, Johnson Consulting

# PROJECTED DIRECT SPEND

## Economic and Fiscal Impact of New Ryan Field

### Estimated Average Daily Spending

The table on the bottom left summarizes the assumed average daily spending by visitors to the new Ryan Field upon renovation, across event type, spending type, and the origin of visitors. The table on the bottom right shows the resulting total direct spending at the new Ryan Field. As shown, the 3-concert Scenario is estimated to generate approximately \$51.7 million in direct spending; the 6-concert Scenario, \$60.4 million.

Ryan Field, Northwestern University, Evanston, Illinois Average Daily Spending by Non-Local Visitors					
	Football	Concerts	High School Sports	Other Ticketed Events	Catered Events
<b>Spending by Non-Local Visitors</b>					
Lodging	\$141	\$141	\$141	\$141	\$141 per room night
Meals and Incidental Expenses	53	53	53	53	53 per visitor
Tickets	50	50	20	30	30 per ticketed attendee
Shopping	26	26	26	26	26 per visitor
<b>Total</b>	<b>\$270</b>	<b>\$270</b>	<b>\$240</b>	<b>\$250</b>	<b>\$250</b>
<b>Spending by Local Visitors</b>					
Lodging	\$0	\$0	\$0	\$0	\$0 per room night
Meals and Incidental Expenses	15	15	15	15	15 per visitor
Tickets	50	50	20	30	30 per ticketed attendee
Shopping	5	5	5	5	5 per visitor
<b>Total</b>	<b>\$70</b>	<b>\$70</b>	<b>\$40</b>	<b>\$50</b>	<b>\$50</b>

Source: U.S. General Services Administration, Johnson Consulting

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Projected Direct Spending (\$000)			
	2018**	3-Concerts	6-Concerts
Football	\$30,779	\$20,264	\$20,264
Concerts	na	8,720	17,439
High School Sports	na	2,912	2,912
Other Ticketed Events	na	2,630	2,630
Catered Events	na	2,235	2,235
<b>Total</b>	<b>\$30,779</b>	<b>\$36,760</b>	<b>\$45,480</b>
Facility Operation*	\$6,921	\$14,931	\$14,931
<b>Total</b>	<b>\$37,699</b>	<b>\$51,691</b>	<b>\$60,411</b>

\*Estimated (facility operation is budgeted, independent of activity volume)

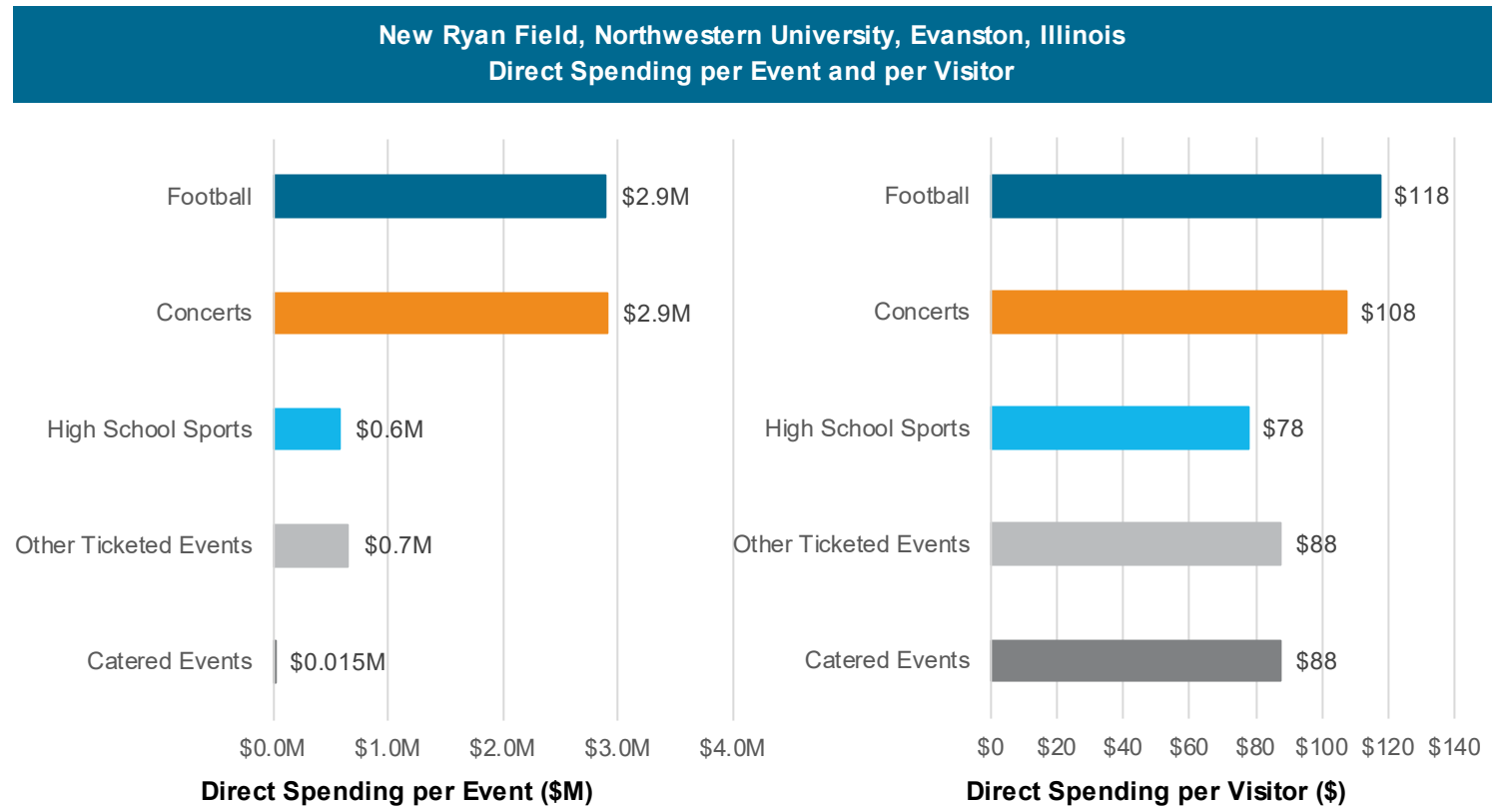
\*\*Reflecting historical best between 2015 thru 2019

Source: Johnson Consulting

# PER EVENT IMPACT

## Per Event and Per Attendee Impact

The bar chart on the right compares the estimated direct spending per event and per attendee by event types. Football games and concerts are comparable, generating approximately \$2.9 million of direct spending per event. Direct spending per attendee differs slightly, with the Football games and concerts generating \$118 and \$108 of direct spending per visitor, respectively.



Source: Johnson Consulting

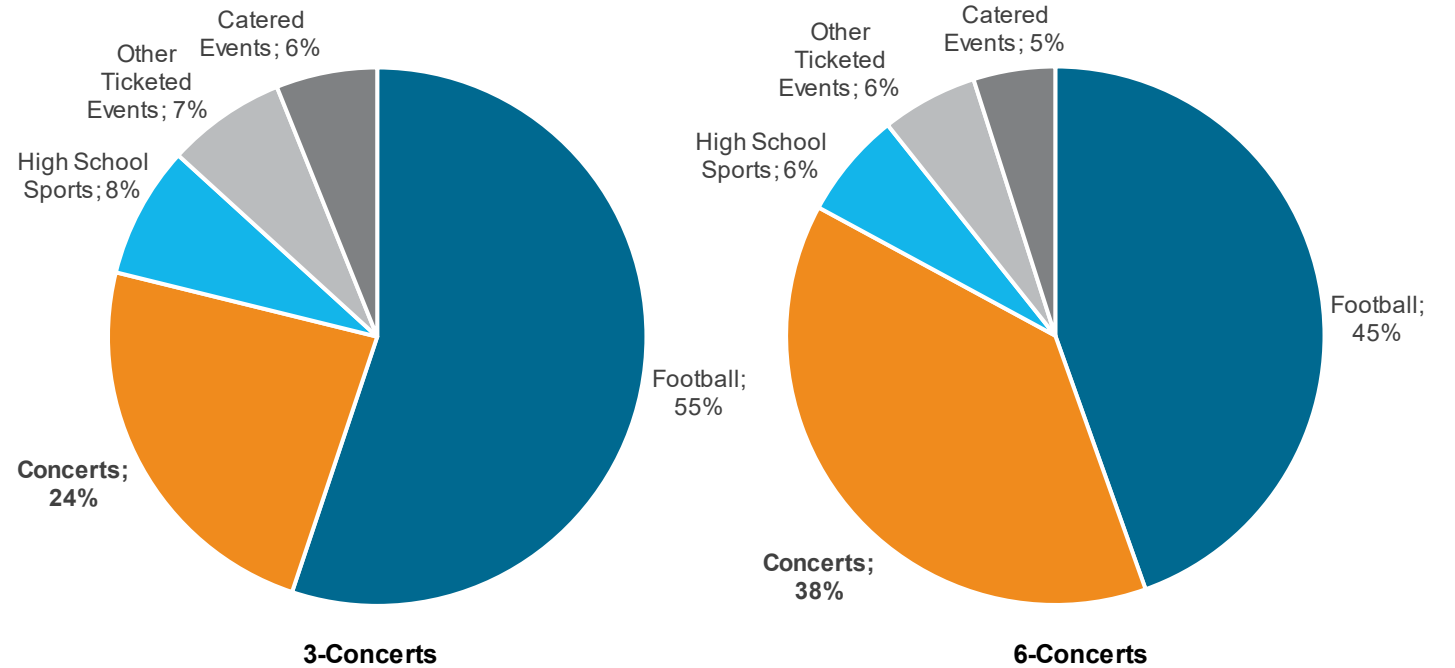


# DIRECT SPEND 3 VS 6 CONCERTS

## Direct Spending Distribution

The pie charts on the right compare the contribution of different event types to overall direct spending. As shown, in the 3-concert Scenario, the concerts contribute 24 percent of direct spending. In the 6-concert Scenario, the contribute 38 percent of direct spending.

New Ryan Field, Northwestern University, Evanston, Illinois  
Direct Spending Distribution



Source: Johnson Consulting

# PROJECTED TOTAL ECONOMIC AND FISCAL FISCAL IMPACT

## Economic and Fiscal Impact of New Ryan Field

### Estimated Economic and Fiscal Impact

The table on the top right summarizes the estimated economic impact of the new Ryan Field, by applying the multiplier rates to the estimated direct spending amount. As shown, the 3-concert Scenario is estimated to generate approximately \$70.8 million in total spending, \$24.7 million in increased earnings, and 470 jobs. The 6-concert Scenario is estimated to generate approximately \$82.8 million in total spending, \$28.8 million in increased earnings, and 540 jobs.

The table on the bottom right summarizes the estimated fiscal impact of the new Ryan Field, by applying the applicable tax rates to relevant components of direct spending amount. As shown, the 3-concert Scenario is estimated to generate approximately \$5.5 million in tax revenues from sales tax, hotel occupancy tax, amusement tax, taxes on athletic tickets, food and beverage sales tax, and parking tax. The 6-concert Scenario is estimated to generate approximately \$6.6 million in tax revenues from such taxes.

The estimated economic and fiscal impact in either scenario at the new Ryan Field are greater than the impact of the existing facility, with the 3-concert Scenario showing a nearly 13 percent increase from 2018 (historical best) and the 6-concert Scenario showing a 23 percent increase from 2018 (historical best).

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Economic Impact (\$Million)			
	2018*	3-Concerts	6-Concerts
Direct Spending	\$37.7	\$51.7	\$60.4
Indirect Spending	13.9	19.1	22.3
Induced Spending	18.1	24.8	29.0
<b>Total Spending</b>	<b>\$51.6</b>	<b>\$70.8</b>	<b>\$82.8</b>
Increased Earnings	\$18.0	\$24.7	\$28.8
Employment (FTE)	340	470	540

*\*Reflecting historical best between 2015 thru 2019*  
Source: Johnson Consulting

New Ryan Field, Northwestern University, Evanston, Illinois Capacity: 35,000 Estimated Overall Fiscal Impact (\$Million)			
	2018*	3-Concerts	6-Concerts
Sales Tax (State and Local)	\$3.1	\$3.7	\$4.6
Hotel Occupancy Tax	0.3	0.3	0.3
Amusement Tax	0.0	0.3	0.5
Taxes on athletics tickets	1.6	1.0	1.0
Liquor Consumption Tax	0.1	0.1	0.1
Parking Tax	0.03	0.03	0.04
<b>Total</b>	<b>\$5.0</b>	<b>\$5.5</b>	<b>\$6.6</b>

*\*Reflecting historical best between 2015 thru 2019*  
Source: Johnson Consulting

# CITY OF EVANSTON ECONOMIC AND FISCAL IMPACT

## Economic and Fiscal Impact of New Ryan Field to the City of Evanston Only

### Estimated Economic and Fiscal Impact

Some spending that has been quantified will not occur in Evanston. For example, there are 900 rooms in Evanston, but we estimate over 1,000 room nights occur per event, most with multiple people in each room. There are just not enough rooms in the City to accommodate demand. Further, some rooms are used for on-going purposes such as business customers and for special events. People will also choose to stay at golf resorts and in downtown Chicago. For football events, even the visiting teams stay in the Glenview area.

There is no data on who stays at which hotels. In our experience, and given the way the hotel market is organized in Evanston, it is estimated that approximately 20 percent to 25 percent stay outside the market.

Spending for food and beverage and shopping is much more locally kept, except for the visitors that stay out of the market already, but many do spend in Evanston. In our estimate, no more than 15 percent of other spend occurs outside Evanston.

Considering the estimated spending that leaks outside the City, the table on the right summarizes the estimated economic impact of the new Ryan Field that occurs within Evanston only. The 3-concert Scenario is estimated to generate approximately \$66.7 million in total spending, \$23.3 million in increased earnings, and 440 jobs in Evanston. The 6-concert Scenario is estimated to generate approximately \$77.8 million in total spending, \$27.1 million in increased earnings, and 510 jobs in Evanston.

**New Ryan Field, Northwestern University, Evanston, Illinois**  
**Capacity: 35,000**  
**Estimated Economic Impact within Evanston Only (\$Million)**

	2018*	3-Concerts	6-Concerts
Direct Spending	\$34.4	\$48.7	\$56.8
Indirect Spending	12.7	18.0	21.0
Induced Spending	16.5	23.4	27.3
<b>Total Spending</b>	<b>\$47.2</b>	<b>\$66.7</b>	<b>\$77.8</b>
Increased Earnings	\$16.4	\$23.3	\$27.1
Employment (FTE)	310	440	510

*\*Reflecting historical best between 2015 thru 2019*  
*Source: Johnson Consulting*

# CITY OF EVANSTON ECONOMIC AND FISCAL IMPACT

## Economic and Fiscal Impact of New Ryan Field to the City of Evanston Only

### Estimated Economic and Fiscal Impact

The table on the right summarizes the estimated fiscal impact of the new Ryan Field that benefits the City of Evanston only. The 3-concert Scenario is estimated to generate approximately \$2.2 million in tax revenues from City sales tax, hotel occupancy tax, amusement tax, taxes on athletic tickets, liquor consumption tax, and parking tax to the City of Evanston. The 6-concert Scenario is estimated to generate approximately \$2.5 million in tax revenues from such taxes to the City of Evanston.

In summation, the 3-concert Scenario is not significantly different compared to 2018 (historical best), however the 6-concert Scenario projects nearly a 12 percent increase in fiscal impacts compared to 2018 (historical best).

**New Ryan Field, Northwestern University, Evanston, Illinois  
Capacity: 35,000  
Estimated Fiscal Impact to City of Evanston Only (\$Million)**

	2018*	3-Concerts	6-Concerts
Sales Tax	\$0.3	\$0.4	\$0.5
Hotel Occupancy Tax	0.3	0.3	0.3
Amusement Tax	0.0	0.3	0.5
Taxes on athletics tickets	1.6	1.0	1.0
Liquor Consumption Tax	0.1	0.1	0.1
Parking Tax	0.03	0.03	0.04
<b>Total</b>	<b>\$2.3</b>	<b>\$2.2</b>	<b>\$2.5</b>

*\*Reflecting historical best between 2015 thru 2019*

*Source: Johnson Consulting*

# OTHER CONSIDERATIONS

## Conclusion

This analysis results in amounts close to that of Tripp Umbach. While assumptions and methodology may vary, the market demand remains and resulting analysis remains consistent. This analysis **has** considered:

- Reasonableness of multipliers: Our projections are similar to those in the Tripp Umbach report based on the newly accessed Implan analysis.
- Transfer/leakage of demand: Evanston does not have capacity to absorb all of the room nights, so some leak to other parts of the region- **recognized**
- Cannibalization: An individual may choose to go to a game versus another activity, causing a consequence at another activity they could have gone to. This is deemed to be immaterial as buying patterns are very ingrained in history. If there were to be consequences, it is feasible the impacts would be felt by another event venue.
- Incremental costs to the City: These costs have been considered. Northwestern has agreed to pay the event costs and already pay game day expenses. If there are incremental gameday expenses or other overhead incurred, these are not quantified by the City at this point. Once quantified, such costs should be addressed in a Community Benefits Agreement with Northwestern University.

The table at right compares the highlights of the findings of each analysis.

Annual Total Economic Impact Comparison City of Evanston						
	Tripp Umbach			Johnson Consulting		
Year	Current (2022)	2026	2031	2018*	5-Year Average	
<b># of Concert Events</b>	10	10	10	0	3	6
<b>Economic Impact (millions)</b>	\$50.4	\$97.9	\$101.9	\$47.2	\$66.7	\$77.8
<b>Total Taxes Generated (millions)</b>	\$1.4	\$5.2	\$5.3	\$2.3	\$2.2	\$2.5
<b>Jobs</b>	376	792	827	310	440	510

\*Reflecting historical best between 2015-2019

Source: Tripp Umbach, Johnson Consulting



# OTHER CONSIDERATIONS

## Vision

There is a positive outcome for the Cities of Evanston and Wilmette, if desired. A poorly performing asset that results in insufficient use of the area on Central Street would be replaced at virtually no cost to the City. The replacement would be a more utilized venue but with a lower capacity, rebuilt with attention to placemaking, parking and transit.

This project presents an opportunity to help address one of the City's major weaknesses, being that there is not enough critical mass to attract people to the City. Demand drivers, such as an improved venue, are needed to bring more weight to the east side of the community.

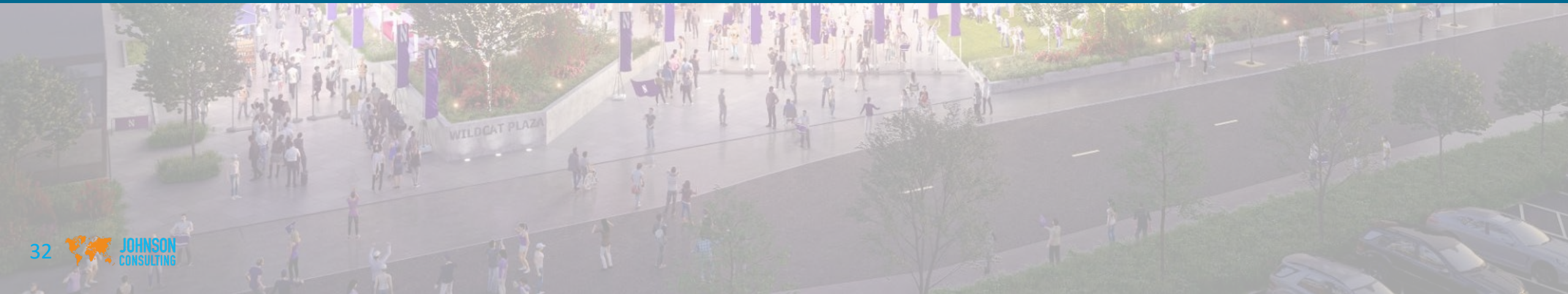
Economically to the City and to Northwestern, a larger concert has almost equal economic value to the market as a football game. It is reasonable for Northwestern to attempt to get some additional demand to cover costs.

The current stadium adds limited value beyond seven football game days. If the city is seeking new revenue sources, the redeveloped stadium would be a demand driver with its additional concerts and special events, along with activating the plaza spaces.





## SEC 3. TRAFFIC STUDY OBSERVATIONS



# CONCERT TRANSPORTATION

Desman’s analysis (full study found in Appendix A) of the impact of the use of Ryan Field as a concert venue is largely based on the Kimley-Horn “Concert Venue Traffic Impact Study”, April 2023. Our principal finding is that while technically accurate in identifying the magnitude of the problem, it does little or nothing to mitigate the impact. What solutions they offer the area not accompanied by a feasible implementation plan. These issues are discussed below.

The study identified 7,562 parking spaces on and off-site, of which they assumed 6,523 would be available for concert parkers. See Table 2. We would suggest that the 80 percent availability of off-site parking be confirmed at the times when concerts would likely be held (weekday and primarily weekend evenings).

The study also estimated the mode split for concert attendees. As shown in Table 3, 52 percent of attendees would drive and park, 30 percent by CTA, 10 percent by Metra and 5 percent by Taxi/TNC. Given this mode use, we translated the mode split into attendance by mode. Column 3 shows that of the 28,000 attendees 14,560 would come by car, 8,400 by CTA and 2,800 by Metra, etc. We then translated the attendance into number of vehicles required. This identifies 5,824 parkers (at 2.5 per car), 11 CTA size car trains, two 10 car Metra trains, and 681 pickup and drop offs each of which needs to be accommodated simultaneously. According to the traffic impact study, 85 percent of the attendees need to be accommodated in the peak hour after the event. That calculation is shown in the right most column.

**Table 2 Available Parking Spaces for Concerts**

<b>On Site</b>	Spaces
West Lot	901
East Lot	415
<i>On-site Total</i>	<u>1,316</u>
<b>Canal Shores</b>	
Lot #1	200
Lot #3 North	150
Lot #11	200
Lot #12	300
<i>Canal Shores Total</i>	<u>850</u>
<b>Popular Avenue (Metra)</b>	200
<i>Metra Total</i>	2,366
<b>Off-Site Downtown</b>	
Maple Street Garage	1,400
Sherman Street Garage	1,583
Church Street Garage	600
<i>Sub-total</i>	<u>3,583</u>
<i>80% available</i>	2,866
<b>Off-Site Northwestern Campus</b>	
North Campus Garage	500
South Campus Garage	621
Tennis Court Lot	161
Field Hockey Lot	182
Northwestern Place Lot	149
<i>Sub-total</i>	<u>1,613</u>
<i>80% available</i>	1,290

**Total Parking Available for Concert 6,523**

*Source: Concert Venue Traffic Impact Study, Johnson Consulting*

# CONCERT TRANSPORTATION

This analysis shows that in the peak hour 5,824 parked cars need to be accommodated along with 10 CTA trains, two Metra trains and 681 pickup and drop off vehicles. The traffic study suggests two areas for pick up and drop off. We believe a more detailed pickup and drop-off plan should be developed in coordination with the space needs of the other modes.

The questions that need to be answered include:

- Can the CTA provide 10 six car trains in the hour after an event?
- Can Metra provide two 10 car trains in the hour after an event?
- Will there be enough space to accommodate the loading of 579 Taxi's limos and TNC's in a geofenced area in the hour after an event? This would average 10 per minute.

We would suggest that the loading and unloading of all modes be shown on a single plan to show how they would be accommodated in the area around the stadium.

**Table 3 Concert Attendees by Mode of Travel**

Travel Mode	Share	Riders	People per Car/train	Cars per Train	Total People per trip	Trips	85% in Peak Hour
Auto & Park	52%	14,560	2.5	1	2.5	5,824	
CTA Purple line	30%	8,400	123	6	738	11	<b>10</b>
Metra	10%	2,800	148	10	1,480	2	<b>2</b>
Taxi/TNC	5%	1,400	3	1	3	560	<b>476</b>
Limo/Black Car	1%	280	3	1	3	112	<b>95</b>
Party Bus	1%	280	30	1	30	9	<b>8</b>
Ped/Bicycle	1%	280	1	1	1	280	<b>238</b>
<b>Total</b>	<b>100%</b>	<b>28,000</b>					

Columns 1-3 Sources: Kimley Horn Concert Venue Traffic Impact Study

Column 4 source: DESMAN CTA, Metra



# OFF-SITE LOCATION

The biggest issue is the transportation of parkers from off-site locations to and from the stadium. As shown in Table 4, of 14,560 attendees arriving by car, assuming there are 2,366 spaces available onsite or in walking distance (1,316 + 850 + 200), there would be 5,915 walking from their cars. The remaining 3,458 would be parking remotely. This would represent 8,645 attendees (2.5 per car). Assuming 50 attendees per bus and 85 percent in the peak hour, this represents the need for 147 bus trips in the peak hour. This means that 2.5 buses must depart from the stadium per minute after an event. With three minutes to load each bus, at least 7 or 8 busses would need to be loading on the curb front consistently throughout the hour (3\*2.5=7.5).

We also calculated the number of buses needed to accommodate 8,645 attendees parking remotely. Under nearly ideal conditions, each bus trip requires 3 minutes to load, at least 8 minutes to drive to the garage, 3 minutes to unload and another 8 minutes to return to Ryan Field. This is a total of 22 minutes per trip (50 passengers). To accommodate the 147 bus trips required in the peak hour would require 51 buses to make 3 trips each. The choreography required while possible theoretically would require extraordinary staffing and marshalling at the originating end. This is especially true because with three garages being used to accommodate the parkers, there will be confusion by attendees as to which bus they should be taking. A much more detailed operating plan is required.

We would also suggest a review of elevator capacity at the garages.

**Table 4 Bus Capacity and Demand**

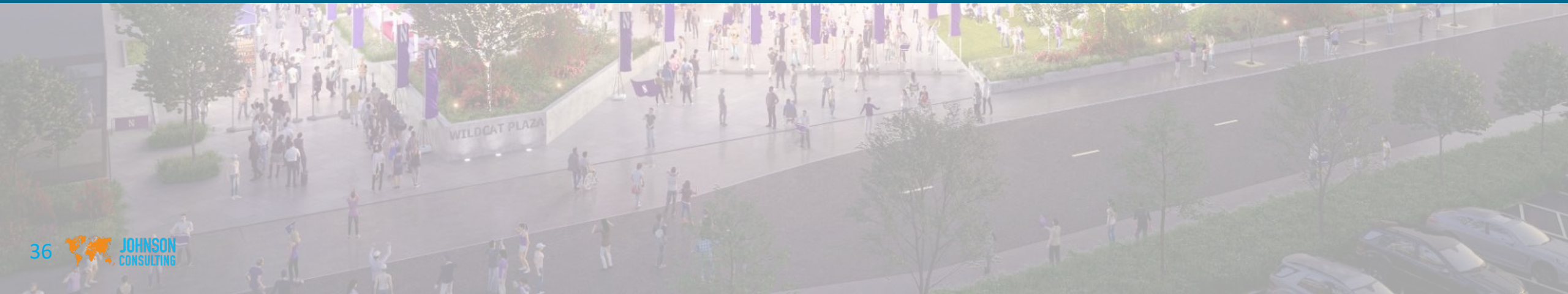
Category	Calc.	Number
Attendees by Auto	52%	14,560
Walking Distance Parking Space	2,366	2,366
Attendees per car	2.5	2.5
Walking Distance Attendees	2366*2.5	5,915
Off-site Attendees	14560-5915	8,645
Bus Capacity	50	50
Number of Bus Trips	8645/50	173
85%	173*85%	147
Bus loading time	3 min	3
Travell time to downtown	8 min	8
Unloading time	3 min	3
Return time	7min	7
Total time per trip	Sum	21
Trips per hour.	60/SUM	3
# of busses needed	85% #/3	<b>51</b>

Source: DESMAN, Johnson Consulting





# SEC 4. STAKEHOLDER ENGAGEMENT



# STAKEHOLDER ENGAGEMENT

This report section provides an overview of the stakeholder engagement conducted throughout the project. Johnson Consulting held both in-person and virtual interviews as well as distributed a questionnaire in order to engage with stakeholders and gain input. The feedback gathered contributed to the considerations and areas of focus relative to our engagement.

- Stakeholders include the following:
  - Evanston Residents
  - City of Evanston
  - Northwestern University
  - Central Street Businesses
  - Evanston Chamber of Commerce
  - Downtown Evanston
  - The Main-Dempster Mile, an Evanston Community Organization

# COMMUNITY INTERVIEW OBSERVATIONS

- Some Evanston residents believe the addition of concerts, especially in the summer, will help with the seasonality of business as Northwestern students leave Evanston during the summer
- Northwestern and the City of Evanston should establish an effective community benefits agreement
- Some Evanston Residents and residents in adjacent communities in close proximity to Ryan Field are concerned about excessive parking in their neighborhoods
- Some Evanston residents believed the addition of concerts is manageable and would have significant and positive impacts on the Evanston economy
- Downtown business owners were in favor of concert events bringing in more visitors and more dollars into Evanston, and possibly more hotel room nights
- There was a shared sentiment among Evanston residents that small businesses should be involved in Northwestern hosted events
- Some Evanston residents are concerned about noise, parking, traffic, crowding, and EMS vehicle accessibility and are not supportive of living near an entertainment hub; believe it will compromise quality of life
- Other community events and concerts that have taken place in Evanston have not generated major issues or concerns

# CENTRAL STREET BUSINESS QUESTIONNAIRE

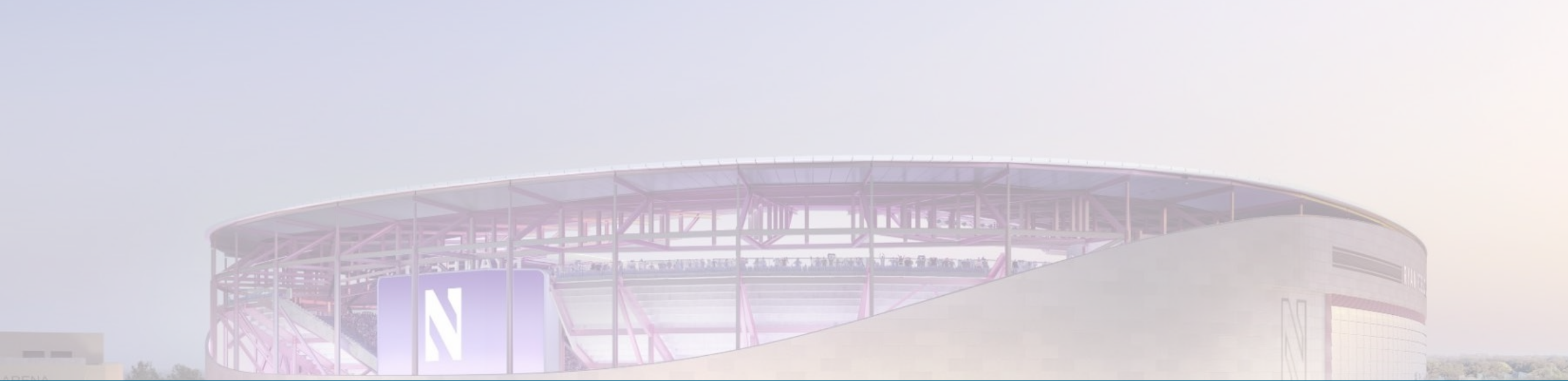
A questionnaire was distributed to Central Street Businesses and there were a total of 24 responses from Central Street Business Owners/General Managers

- Respondents were equally divided between being in support of or against the proposed zoning change to add concert events at Ryan Field
- Comments:
  - Some businesses will benefit, some will not
  - More events will bring in more customers during event days, showcase Central Street district and boost likelihood new and returning customers
  - A portion of event revenues should be reinvested into the Central Street Business district
  - Restaurants and bars benefit, but retail and service-based businesses suffer on game days
  - Concerns include traffic, parking, decrease in local customer activity, EMS accessibility, disruptive to businesses and Evanston residents, non-local's disorderly behavior, security, Northwestern's role in the Evanston community, crowd control, and noise

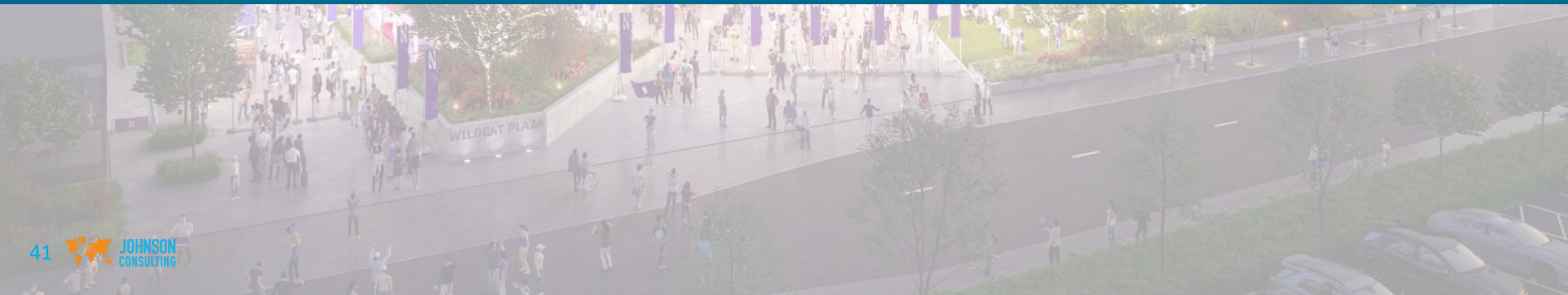
# IMPLICATIONS

- Overall, feedback was largely balance between residents and business owners in the community in regards to being in support of or opposed to concerts and other special events hosted at Northwestern University
- Evanston residents and Evanston business owners that are in support of additional concert events in Evanston believe that it will result in an increase in vibrancy and the positive economic impact it will have on the community, especially during the summer when Northwestern students have left Evanston
- Evanston Residents and business owners that are not in support of additional concert events at Ryan Field are concerned about traffic, parking, noise, accessibly, and security
- There is a shared sentiment that Northwestern and the City of Evanston should structure a community benefits agreement to ensure a portion of event revenue is reinvested into the community

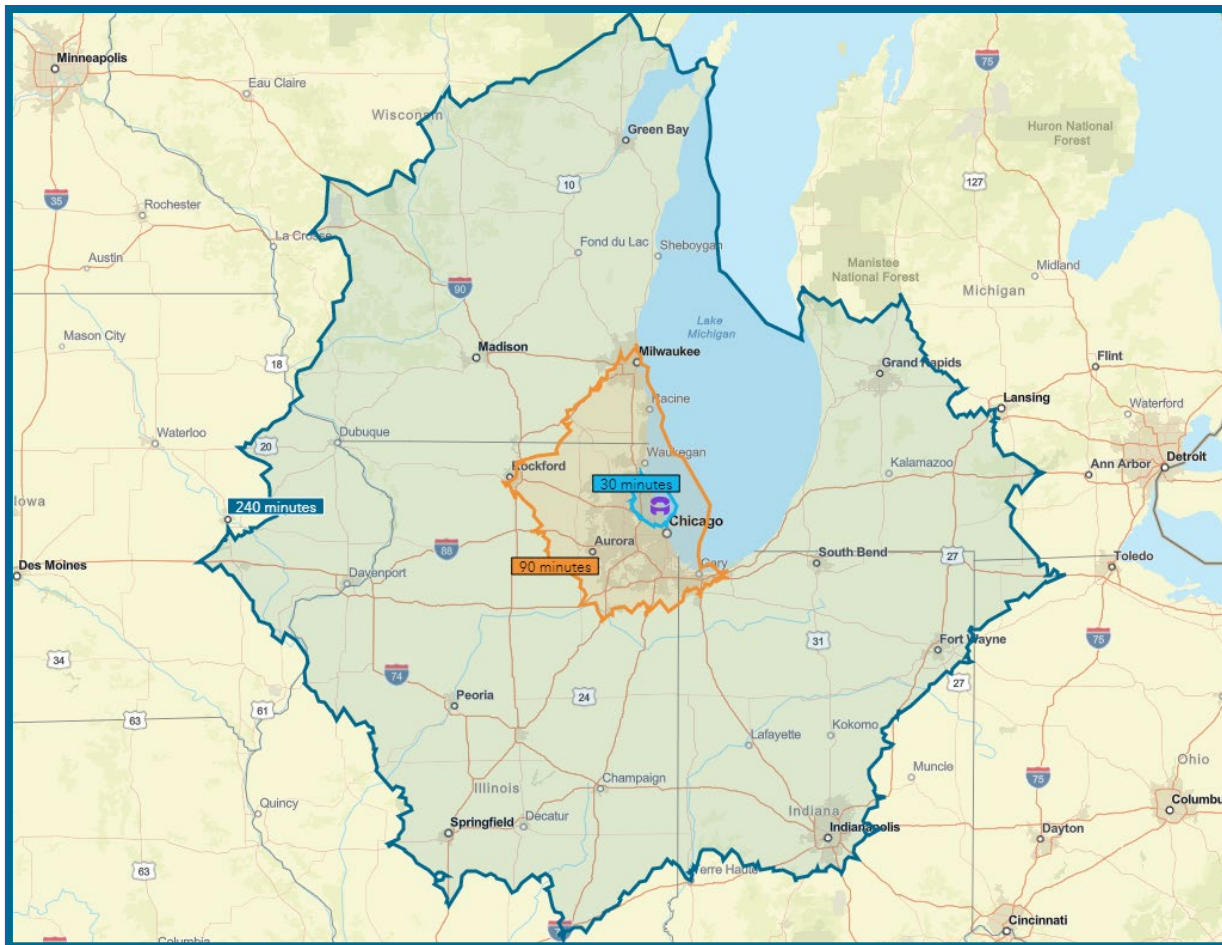




# SEC 5. MARKET ANALYSIS



# MARKET OVERVIEW



- Ryan Field is located in Evanston, Illinois, about 15 miles north of downtown Chicago.
- Evanston is easily accessible by car, public transit, (Chicago Transit Authority, Pace, and Metra) and the nearby O'Hare International Airport. The City is not on any Interstate, which can affect the ease of accessing the City.
- To analyze market opportunities in Evanston, an analysis of a 30-minute, 90-minute, and 240-minute drive time is conducted, which is the likely distance for travel to events at Ryan Field, and is compared to the demographics of the City, County, State, and Nation.

# POPULATION

## Economic & Demographic Trends – Population

- Large and growing population bases – particularly among individuals under the age of 25 – are critical for ensuring the success of sports, recreation, and entertainment facilities. Larger regional populations equate to more potential “drive-to” participants and locally based demand.
- The resident population of Evanston was nearly 78,000 persons in 2022. The 30-minute, 1.5-hour, and 4-hour drive time catchment areas, reflecting the primary draw of the contemplated facility, have populations ranging from roughly 1.4 million to over 23.6 million, with most of that concentrated within the 1.5-hour to 4-hour drive time window. Between 2010 and 2022, the population of Evanston had decreased at an average rate of (0.4) percent per annum. This growth rate is equal to or lower than the other comparative geographies, but follows a similar decrease or slow growth trend for the other geographies.
- The table below shows the population trends for the United States, Illinois, Cook County, and Evanston, as well as for the 30-minute, 1.5-hour, and 4-hour drive time catchment areas.

	Population				CAGR* 2010-2022	CAGR* 2022-2027
	2000	2010	2022	2027		
United States	281,421,906	308,745,538	335,707,897	339,902,796	0.8%	0.2%
Illinois	12,419,293	12,830,632	12,740,556	12,560,734	-0.1%	-0.3%
Cook County	5,376,819	5,194,680	5,260,375	5,151,356	0.1%	-0.4%
<b>Evanston</b>	74,270	74,486	77,915	76,251	<b>0.4%</b>	<b>-0.4%</b>
<b>30-Minute Drive Time</b>	<b>1,365,413</b>	<b>1,326,145</b>	<b>1,363,556</b>	<b>1,339,049</b>	<b>0.3%</b>	<b>-0.4%</b>
<b>90-Minute Drive Time</b>	<b>9,886,767</b>	<b>10,236,862</b>	<b>10,349,360</b>	<b>10,219,390</b>	<b>0.1%</b>	<b>-0.3%</b>
<b>240-Minute Drive Time</b>	<b>21,855,710</b>	<b>22,937,113</b>	<b>23,647,623</b>	<b>23,601,777</b>	<b>0.3%</b>	<b>0.0%</b>

\*Compounded Annual Growth Rate  
Sources: Esri, Johnson Consulting

# SPENDING BEHAVIOR

## Economic & Demographic Trends – Spending Behavior

- Taking into consideration the projected growth for the already high median household income, it is likely that the average spend for entertainment and recreation will also see an increase. As shown, Evanston is currently performing significantly above the national average and above the catchment areas. This shows a high propensity to spend on entertainment and recreation within Evanston.

Average Spending on Entertainment and Recreation - 2022								
Spending Category	Evanston		30-Minute Drive Time		90-Minute Drive Time		240-Minute Drive Time	
	Average Spend*	Index**	Average Spend*	Index**	Average Spend*	Index**	Average Spend*	Index**
Membership Fees for Clubs	\$173.43	152	\$160.01	138	\$122.33	112	\$107.47	96
Fees for Participant Sports	\$73.58	139	\$68.31	127	\$55.73	110	\$49.53	96
Admission to Sporting Events	\$42.15	142	\$38.94	129	\$31.14	110	\$28.10	97
Fees for Recreational Lessons	\$102.33	158	\$97.34	148	\$71.14	115	\$59.26	94
<b>TOTAL</b>	<b>\$391.49</b>		<b>\$364.59</b>	-	<b>\$280.34</b>	-	<b>\$244.37</b>	-

\* Average spend per person, per annum  
 \*\* National Average = 100  
 Source: Esri, Johnson Consulting



# FACILITY INVENTORY



The closest stadium venue to Ryan Field is Wrigley Field, located 10 miles from Ryan Field in the Wrigleyville neighborhood of Chicago. Wrigley Field opened in 1914 and is the home of the Chicago Cubs. The stadium was renovated in 2022 and has a seating capacity of 41,649. Wrigley Field regularly hosts concerts and other special events in addition to the baseball season

The following SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis evaluates the existing market conditions in Evanston, IL and the prospect of Ryan Field as a concert and special event venue.

# S

## Strengths

- Well educated population with a strong presence of educational institutions
- Young base
- High and growing median household incomes
- Low unemployment rates
- Existing facility that is highly accessible by road and rail
- High propensity to spend on recreation & entertainment

# O

## Opportunities

- Grow quality hotel supply and business
- Increased number of local events
- Draw from larger adjacent cities
- Innovative programmatic and operational modifications
- Corporate and institutional sponsorships and partnerships

# W

## Weaknesses

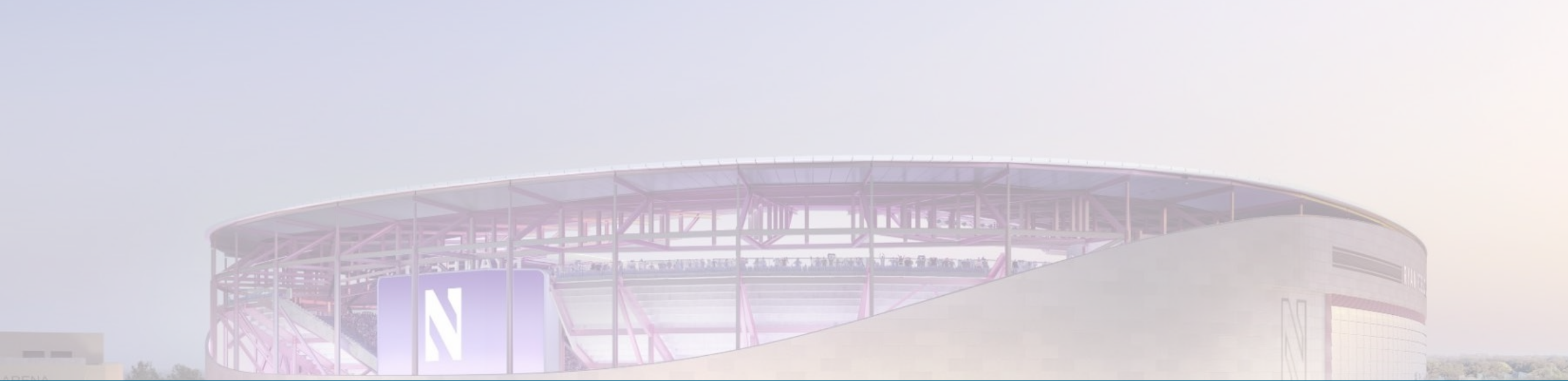
- Lack of a top tier draw
- Hotel supply & number and quality of establishments near Ryan Field (underbuilt with supportive land uses)
- Poor curb appeal

# T

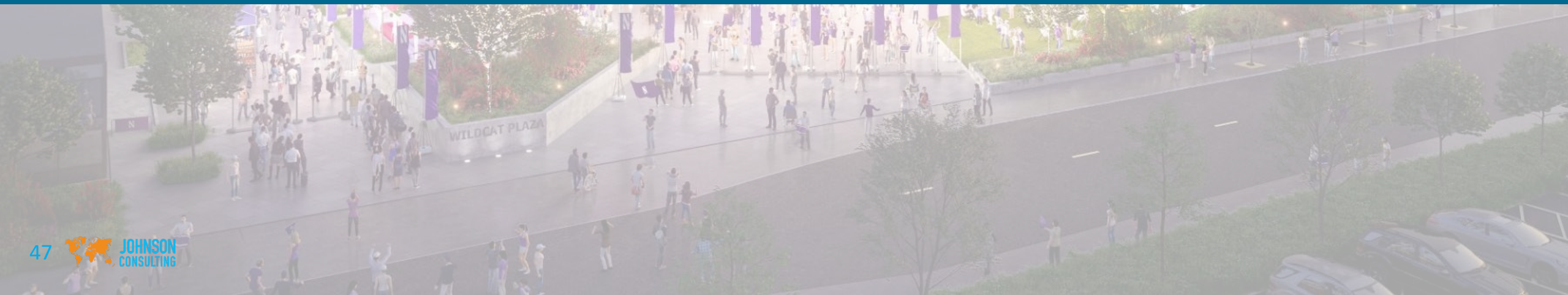
## Threats

- Competition with regional assets
- Cost recovery
- Existing hotel supply
- Limited parking in immediate proximity
- Noise

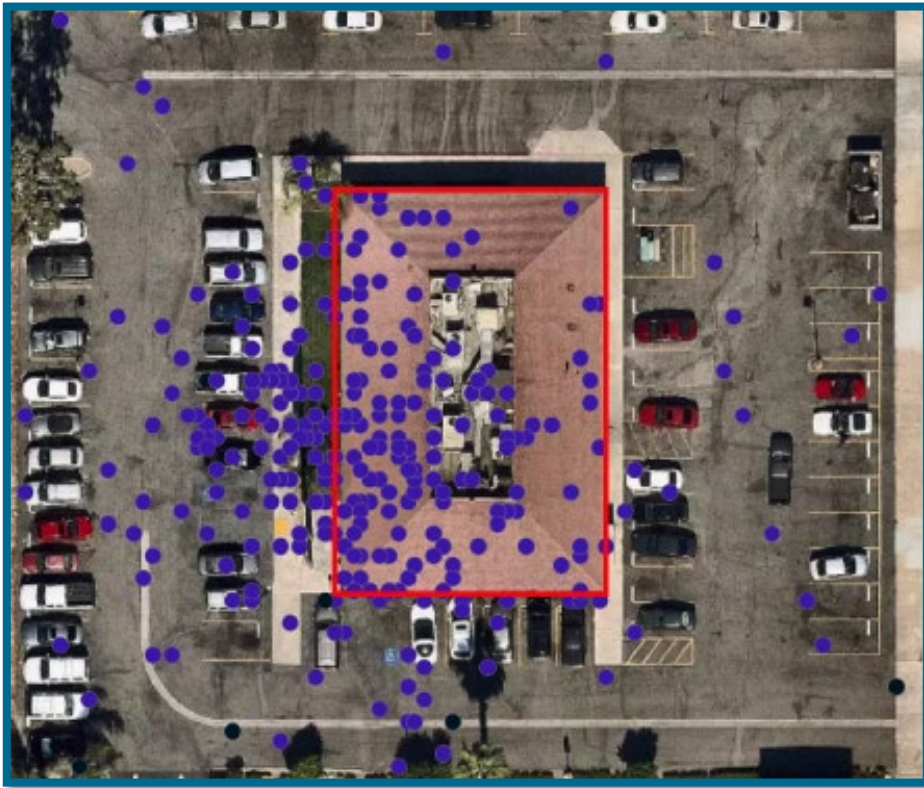




## SEC 6. VISITATION ANALYSIS



# PLACER.AI - OVERVIEW



Placer.ai is an advanced geofencing tool that provides insights into the foot traffic for sports venues, hotels, retailers, restaurants, downtowns and specific events. Placer runs tens of millions of anonymous mobile device data points through a machine learning algorithm to provide a complete picture of foot traffic and visitation trends. Johnson Consulting uses Placer.ai to create custom data analytics and maps.

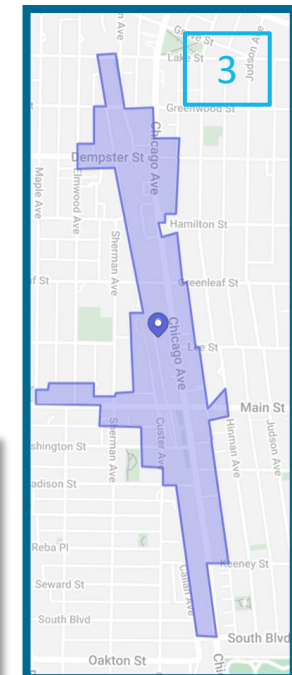
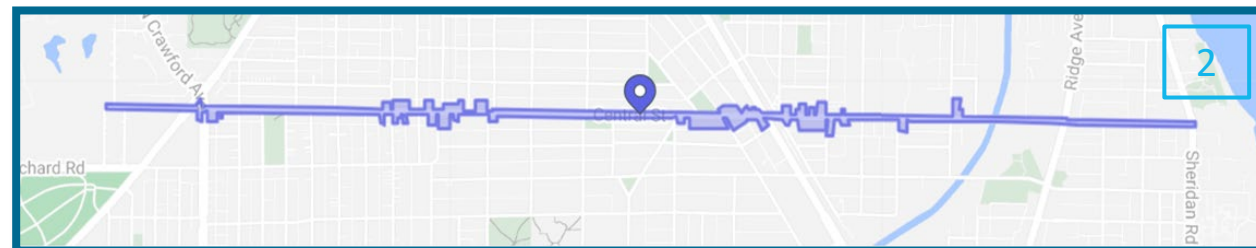
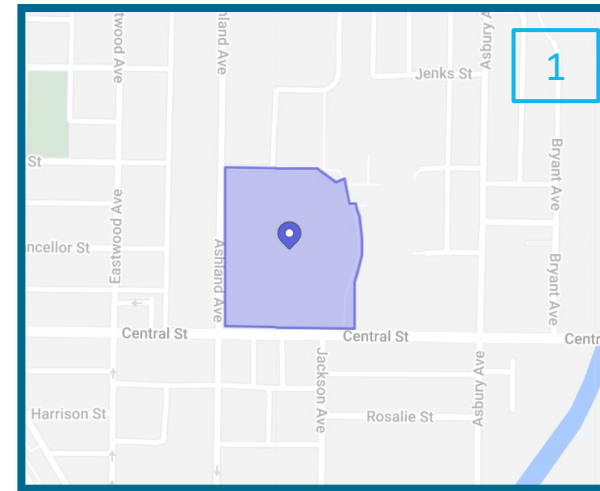
The graphic on the left shows an example of mobile device data points for a single business.

# PLACER.AI- VISITATION ANALYSIS

The following subsection provides foot traffic analysis for three focus areas in Evanston and compares average visitation to the area compared to a popular football game-day. This analysis compares the nature of demand at each location. The key is that Central Street may benefit most from increased volume and foot traffic in comparison to other areas of the City.

■ The three areas analyzed are:

1. Ryan Field
2. Central Street
3. Main-Dempster Mile

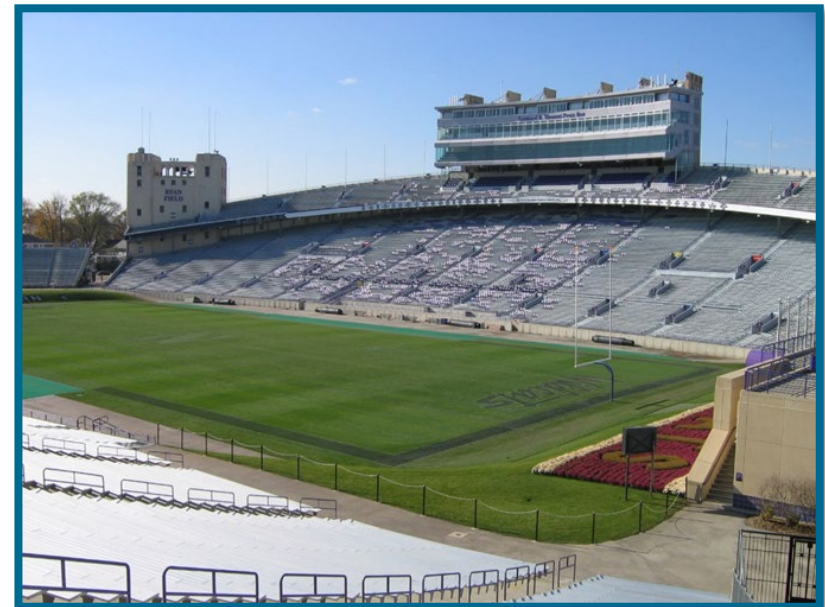




# PLACER.AI - RYAN FIELD

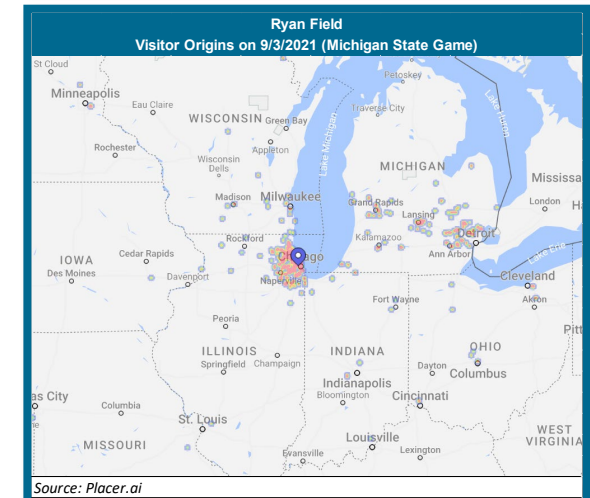
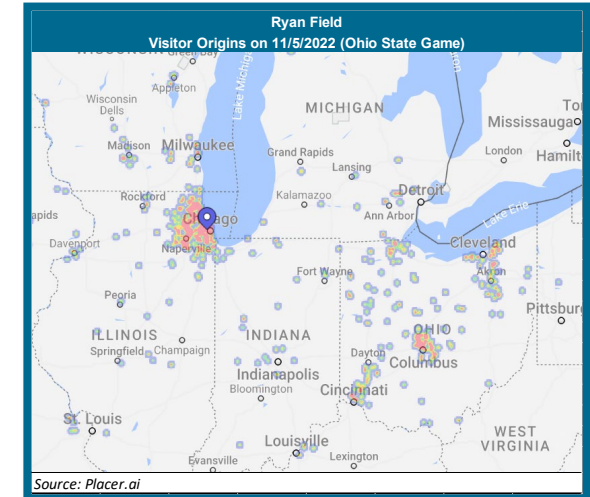
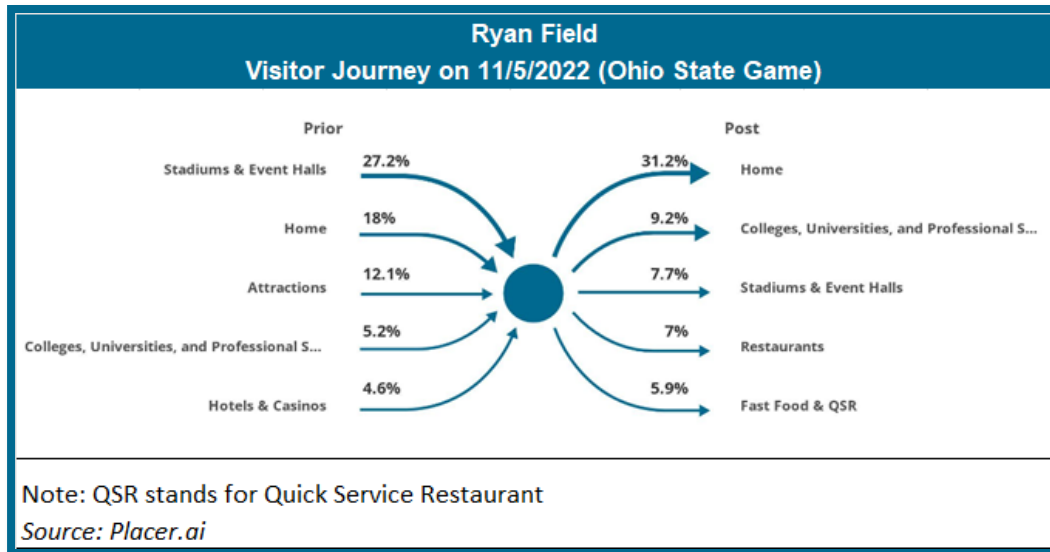


Ryan Field is home to the Northwestern Football team whose games dictate much of the activity in Evanston on Saturdays in the fall. The Northwestern Wildcats played eight home games in 2021 and six home games in 2022. It is one of the oldest stadiums in all of college football and the smallest in the Big 10. Ryan Field has a capacity of 47,130 but has failed to reach high occupancy rates in recent years. The proposed rebuilt Ryan Field will have a capacity of 5,000.



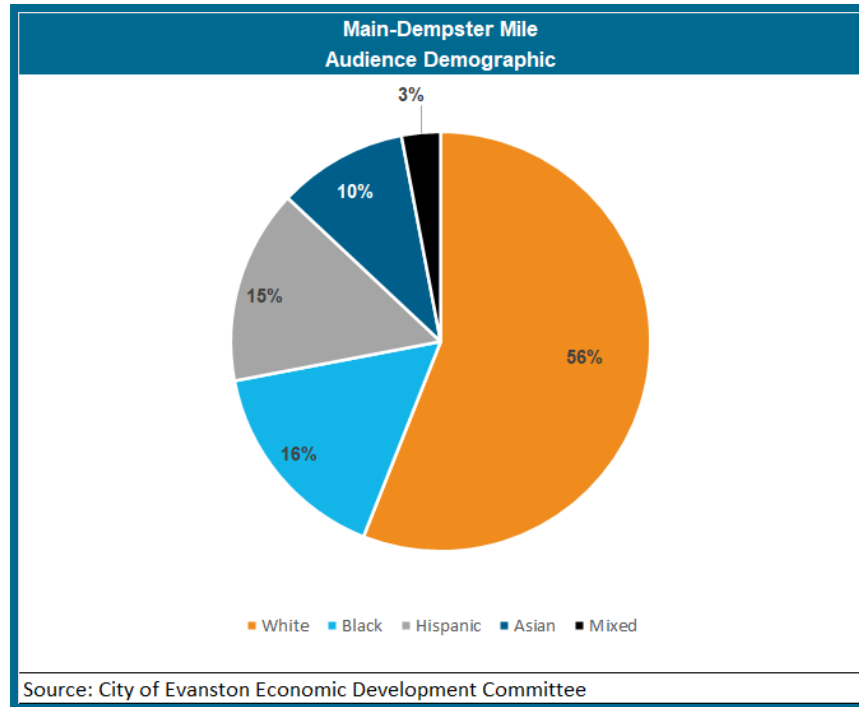
# PLACER.AI - RYAN FIELD - GAME DAY VISITATION

The non-local attendance at Ryan Field for Conference home games was highly concentrated. For the Michigan State game, 16 percent of all attendees came from Michigan zip codes and for the Ohio State game, 18 percent of all attendees came from Ohio zip codes. The distribution of non-conference home games was far less concentrated with a more even distribution of regional and nationwide non-local attendees. The visitor journey graph for the Ohio State game is similar to the visitor journeys for all other home games. Fans come to Ryan Field from home, Welsh Ryan Arena, the Canal Shores Golf Course (which is currently used for parking on game days), Rocky Miller Park and Northwestern University itself, and typically leave to go back to those same destinations.



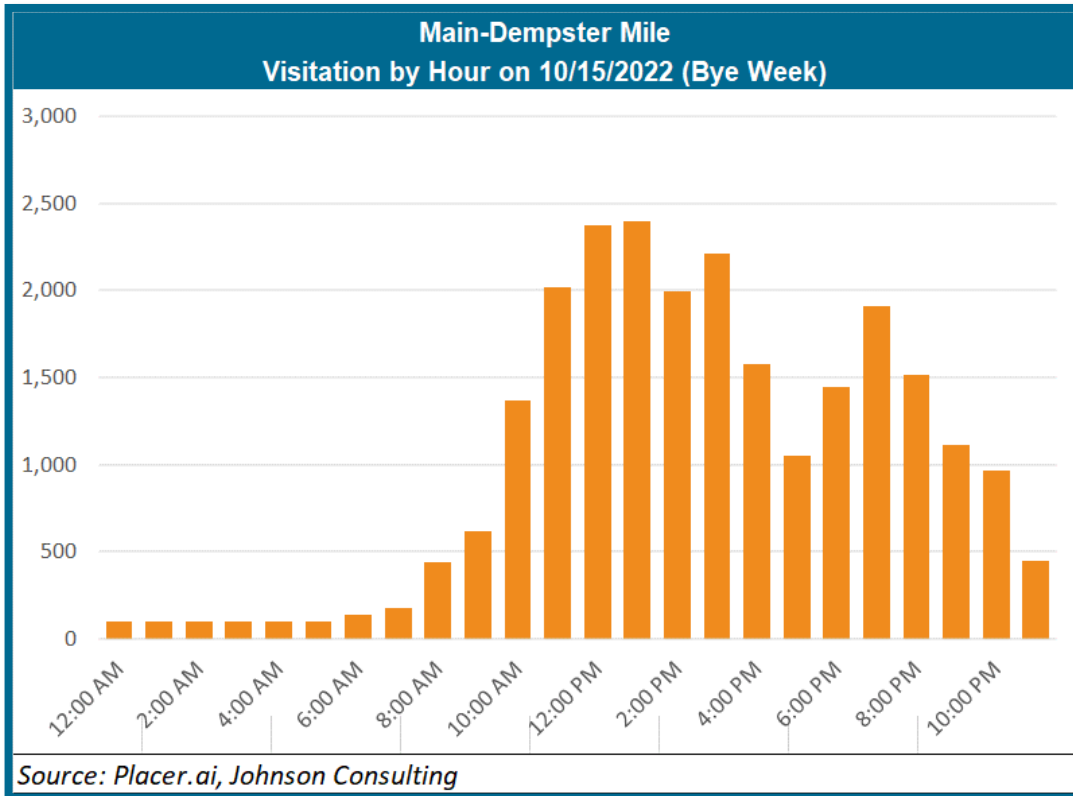
# PLACER.AI - MAIN-DEMPSTER MILE

The Main-Dempster Mile is an Evanston commercial district that is home to a collection of independent businesses, restaurants and artisanal shops. Of the 260+ businesses in the Main-Dempster Mile roughly 220 are locally owned businesses. In addition to seeing some traffic from Northwestern students, the Main-Dempster Mile is visited mainly by wealthy couples, baby boomers and starter families.

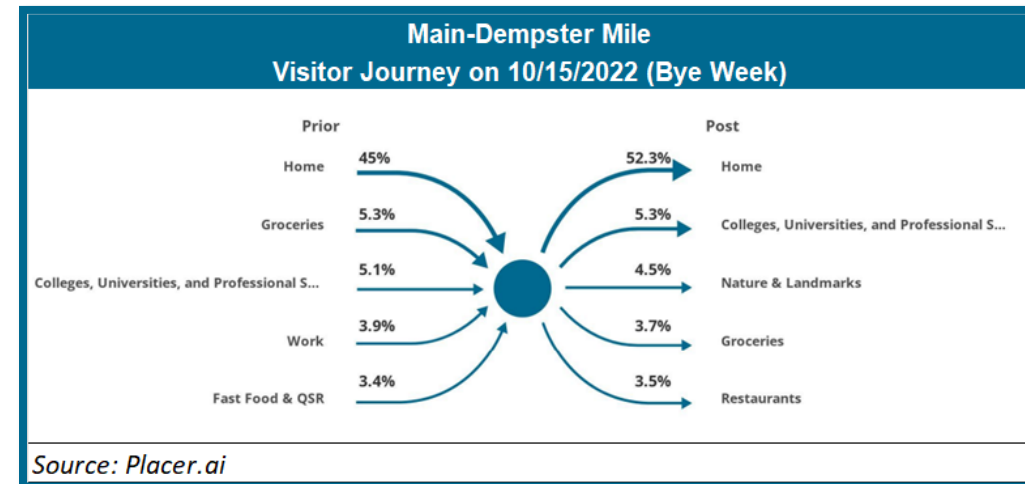




# PLACER.AI - MAIN-DEMPSTER MILE - BYE WEEK BASELINE

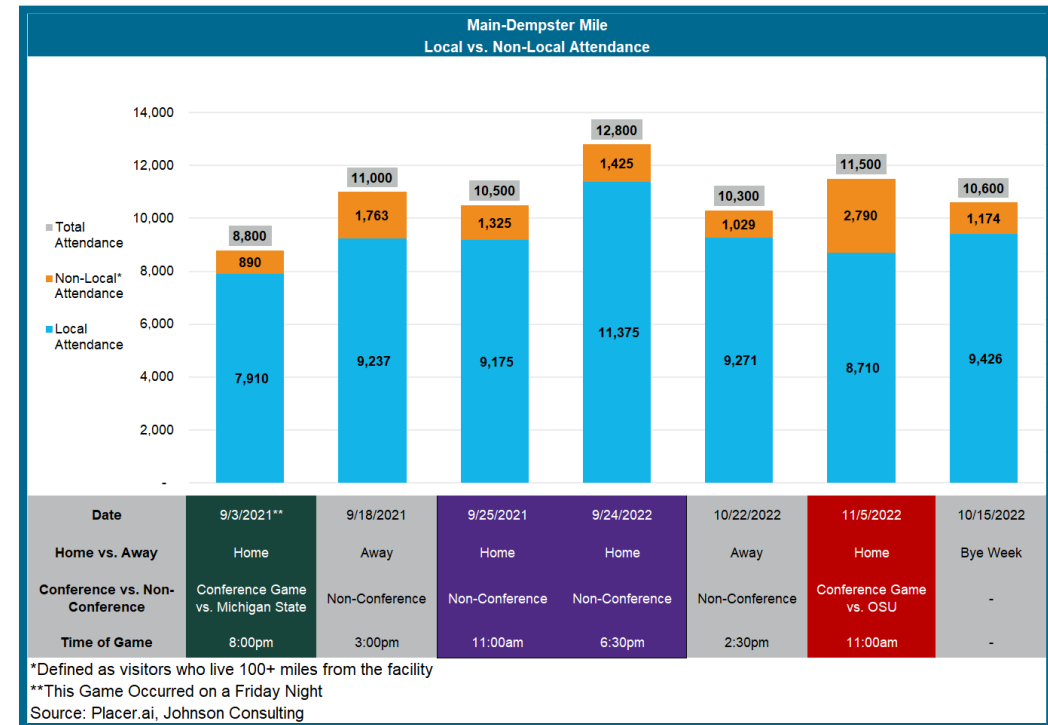
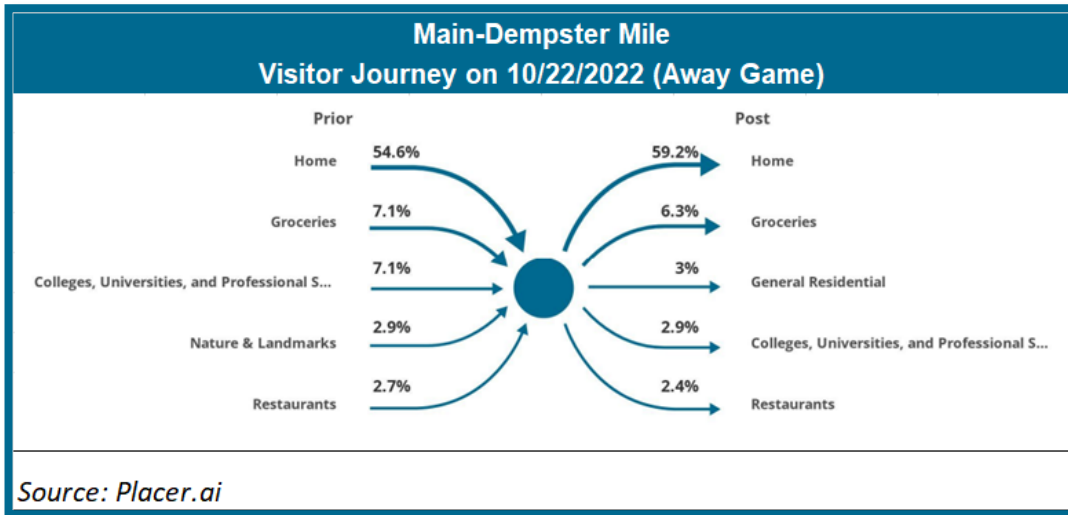


The graph on the left displays visitation for a typical Saturday in the fall without the impact of a Northwestern Football game. Visitation typically peaked around lunch with a second smaller peak around dinner as many of the local restaurants bring a significant draw from the surrounding area. While most visitors came from their homes, a significant amount of people came from Northwestern University. The Main-Dempster Mile also brought people from across the Chicagoland area shown by the Howard CTA station being a common place from where people came.



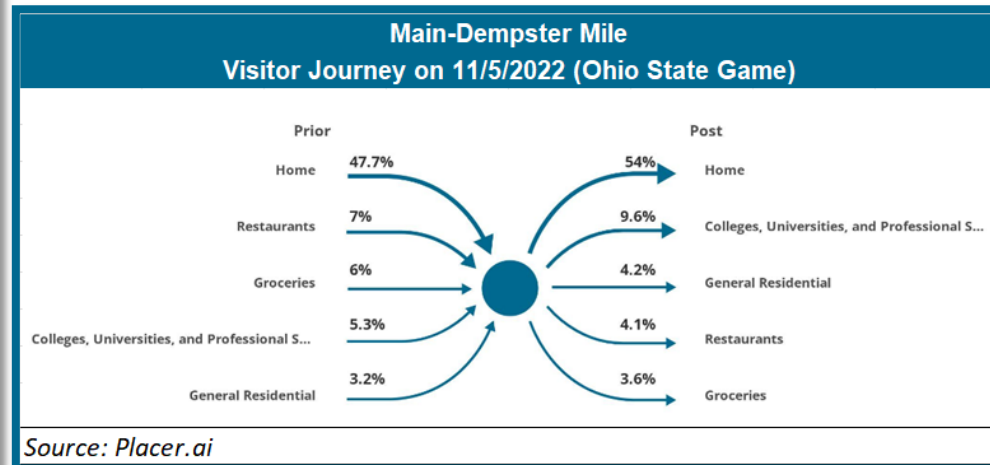
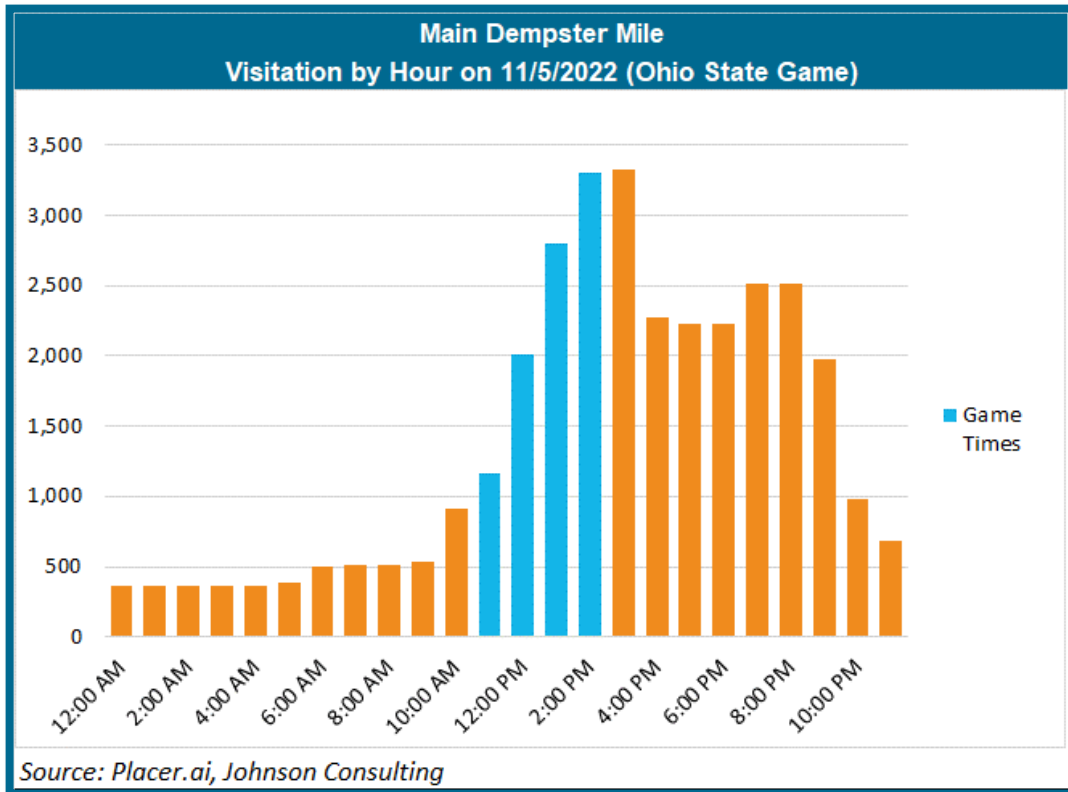
# PLACER.AI - MAIN-DEMPSTER MILE - GAME DAY VISITATION

To quantify the impact to the Main-Dempster Mile on gamedays, we analyzed four different types of days: home conference games against large opponents (in green and red), home non-conference games (purple), away games and a bye week (gray). Attendance to the Main-Dempster Mile was not significantly different whether or not there was a game in town. The two best days in terms of total visits were two home games (Ohio State and another Non-Conference Opponent). However, a home game against a highly ranked opponent in Michigan State made up the slowest day in terms of traffic to the Main Dempster Mile. Both the Bye Week and Away Games performed comparably to the large home games. Northwestern University represented a large portion of visitors even on away games as seen in the visitor journey chart below.



# PLACER.AI - MAIN-DEMPSTER MILE - OHIO STATE GAME

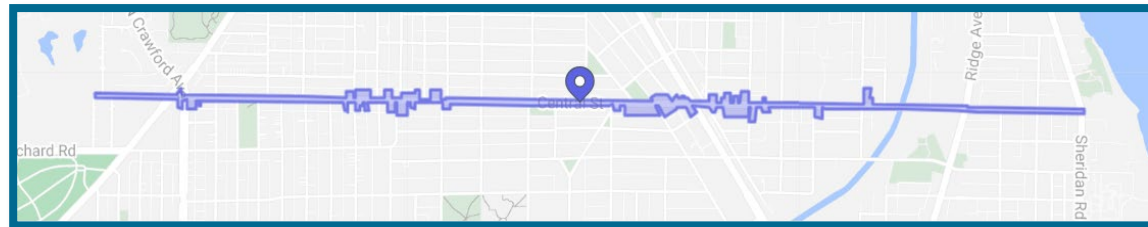
Visits to the Main-Dempster Mile follows a different trend for the Ohio State game. Visits ramp up during the hours of the game and peaks at 2 p.m. - 3 p.m., right as the game finishes. While visitation typically bottoms out sometime between lunch and dinner, visitation remained relatively high due to fans leaving the game. This is validated by the Visitor Journey graph that shows that 5.3 percent of visitors came from Ryan Field. It should be noted that there was an arts event hosted on this day in the area that may have impacted visitation.



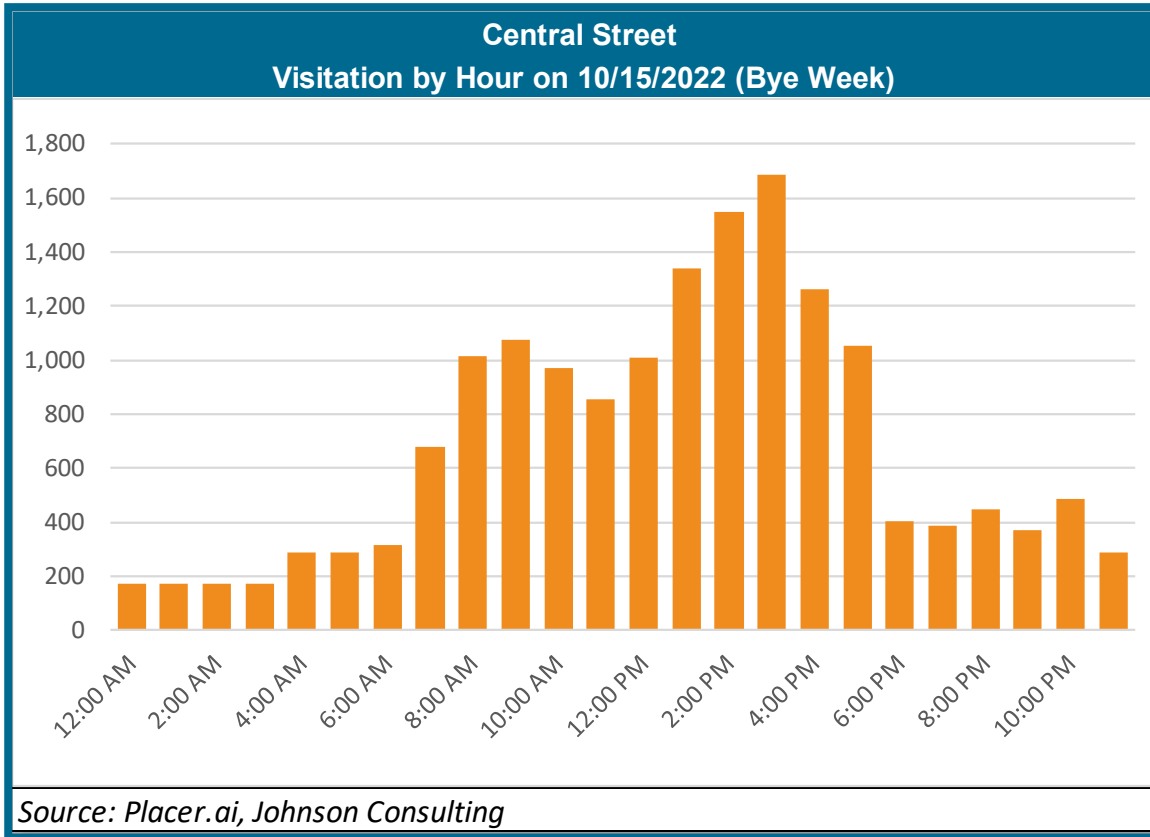
# PLACER.AI - CENTRAL STREET



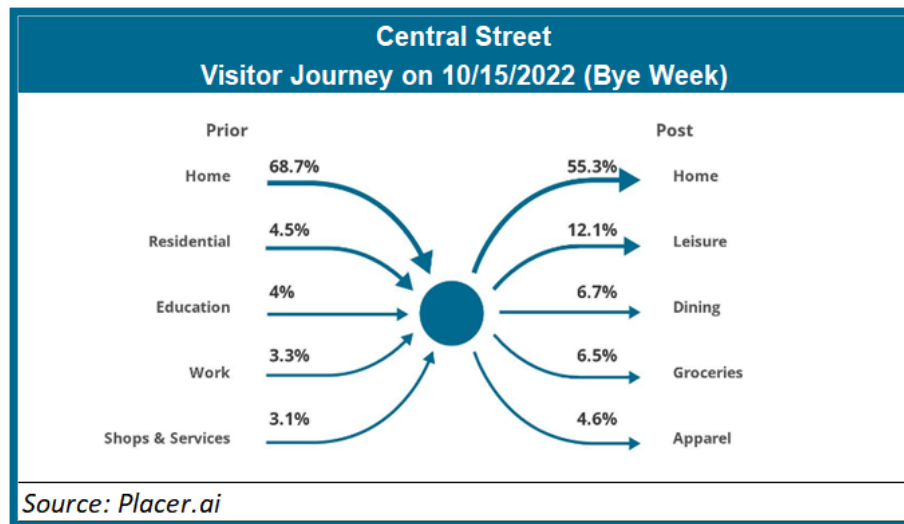
Central Street is the main street on which Ryan Field is located, thus the two locations' visitations are highly correlated on gamedays. Central Street runs from East to West from near the lake to Westmoreland Country Club, cutting through north Evanston. Central Street is a largely residential street along with some shops and businesses. Only retail shops and restaurants were included in the Placer analysis, excluding residential buildings.



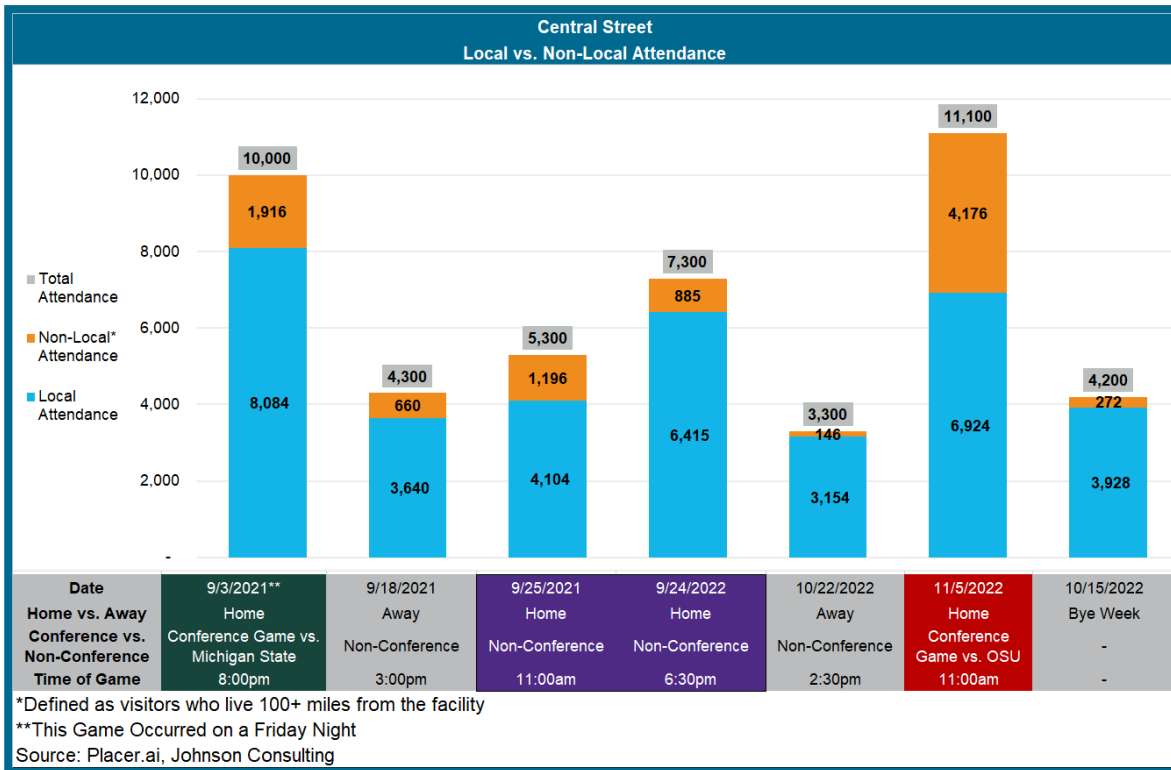
# PLACER.AI - CENTRAL STREET - BYE WEEK BASELINE



Visits by hour on a non-football Saturday in the fall are shown by the graph on the left. Activity peaks around 8 a.m. but then dips around noon and then peaks again around 3 p.m. after which it gradually decreases until 6 p.m. when most activity hits lows. This is largely due to the residential nature of Central Street; the residents of Central Street are typically up at 8 a.m. and back home before 6 p.m. This is also shown in the Visitor Journey graph below where 68.7 percent come to Central Street from their homes and either leave to go back home or get groceries at the Whole Foods on Green Bay Road.



# PLACER.AI - CENTRAL STREET - GAME DAY VISITATION

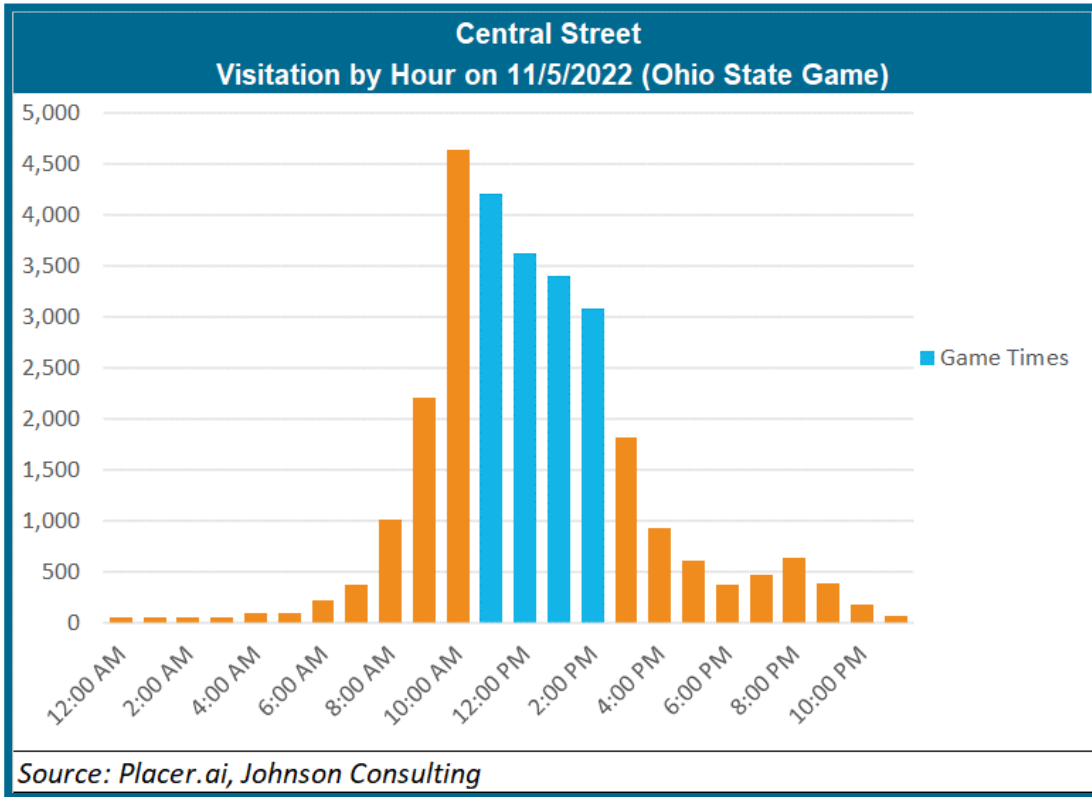


Central Street follows a visitation pattern similar to that of Ryan Field as it is the main major street on which Ryan Field is located. The difference in foot traffic between Conference game days and away games/bye weeks is stark. Central Street saw more than double the amount of foot traffic on the Ohio State game day in comparison to their bye week. Compared to the Main-Dempster Mile, Central Street attracts far fewer non-local visitors on non-game days. This highlights that Central Street's activities are dictated by whether or not Northwestern plays a home game or not. However, concert and other special events may attract visitors with a higher propensity to shop and spend as compared to the football game attendee.

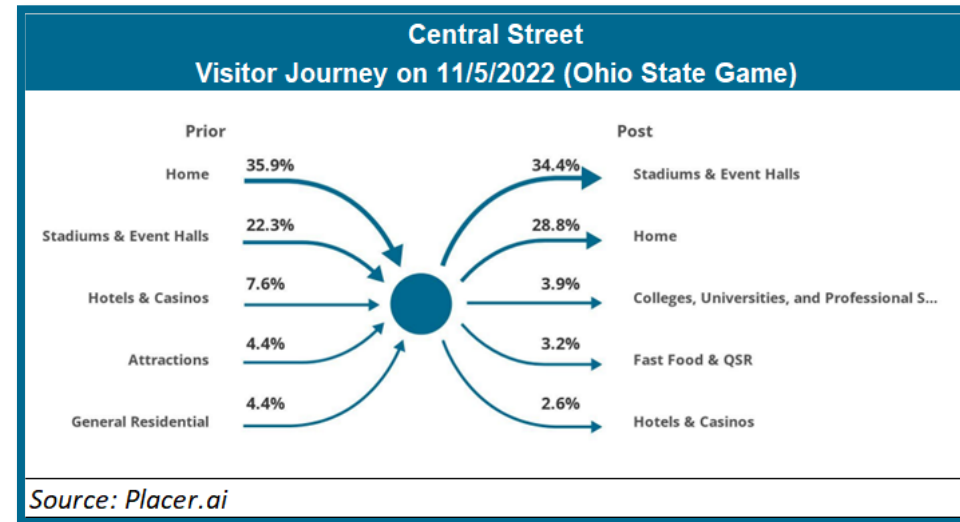




# PLACER.AI - CENTRAL STREET - OHIO STATE GAME

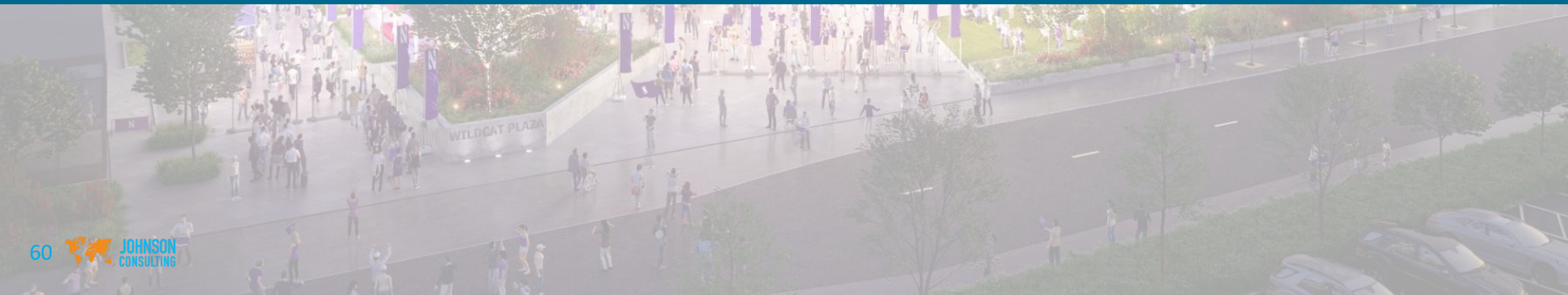


Visitor activity changes substantially during game days. Central Street activity peaks right before game time as people are entering the stadium and decreases but stays busy during the game. However, after the game, activity on Central Street drops off almost completely. This is shown in the Visitor Journey graph which shows that 27.5 percent of people left Central Street to go to Ryan Field.





# SEC 7. BIG 10 BENCHMARKING



# BIG 10 BENCHMARKING

- This report section benchmarks the colleges in the 2023 Big 10 Conference against market and stadium characteristics.
- The University of Wisconsin and the University of Maryland will be further highlighted as they are most comparable to Northwestern.
- The matrixes on the following two pages show an overall comparison between each college, the surrounding area, and their stadium programming.
- Supporting information for this section can be found in Appendix B.

2023 Big 10 Case Studies

	Northwestern University 	University of Michigan 	University of Maryland 	University of Wisconsin 	The Ohio State University 	University of Minnesota 	University of Illinois 
<b>Location</b>							
City	Evanston, IL	Ann Arbor, MI	College Park, MD	Madison, WI	Columbus, OH	Minneapolis, MN	Champaign, IL
CBSA	Chicago-Naperville-Elgin	Ann Arbor	Washington-Arlington-Alexandria	Madison	Columbus	Minneapolis-St. Paul-Bloomington	Champaign-Urbana
# of Undergraduate Students	8,800	32,700	30,100	35,100	44,500	30,600	34,500
<b>City Demographics (2023)</b>							
Population	77,884	125,490	34,276	279,716	927,305	434,244	89,500
Median Household Income	\$87,412	\$75,127	\$59,745	\$70,190	\$61,068	\$70,634	\$51,014
Median Age	36.4	28.7	23.7	33.0	33.9	33.9	27.0
Total Number of Businesses	3,050	5,246	1,089	11,450	28,035	17,055	3,355
<b>CBSA Demographics (2023)</b>							
Population	9,584,302	374,587	6,535,041	702,926	2,200,346	3,771,316	224,212
Median Household Income	\$80,564	\$80,904	\$113,353	\$80,076	\$75,464	\$89,972	\$59,433
Median Age	38.1	35.3	38.2	37.7	37.5	38.3	32.1
Total Number of Businesses	314,714	13,063	222,784	27,129	67,386	121,906	7,274
<b>Stadium</b>							
Name	Ryan Field	Michigan Stadium	SECU Stadium	Camp Randall Stadium	Ohio Stadium	Huntington Bank Stadium	Memorial Stadium
Program	Northwestern Wildcats	Michigan Wolverines	Maryland Terrapins	Wisconsin Badgers	Ohio State Buckeyes	Minnesota Golden Gophers	Illinois Fighting Illini
Seating Capacity	35,000	107,601	54,000	80,321	102,780	50,805	60,670
Premium Seating Available	X	✓	✓	✓	✓	✓	✓
Naming Rights	Individual Donors - Patrick & Shirley Ryan	-	State Employees Credit Union of Maryland	Summit Credit Union	Safelight Auto Glass	TCF Bank	-
Year Opened (Renovated)	1926 (1996)	1927 (2010)	1950 (2012)	1917 (2022)	1922 (2014)	2009 (2021)	1923 (2013)
Recent & Planned Improvements	Ryan Field Rebuild	New scoreboards, improved A/V, minor structural upgrades	New scoreboard	New premium seating south end zone section, other minor improvements	Upgraded seating	New club space, LED displays, increased seating	Daktronics video board, updated sound system, ribbon video boards
<b>Demand (2022)</b>							
Last 12 Months Total Stadium Visits	240,394	1,493,838	637,631	1,825,207	2,599,784	739,348	884,723
3-Year Total Average Attendance	152,520	1,050,459	463,630	1,293,064	1,640,075	521,873	562,674
% of Non-Local Visitors**	24%	30%	22%	25%	33%	15%	36%
Average Football Game Attendance	28,697	110,246	31,934	74,159	104,663	45,019	43,048
Football Attendance % of Capacity	82%	102%	59%	92%	102%	89%	71%
# of Annual Non-Football Events*	1	1	2	2	2	0	0
# of Annual Concert Events	0	0	0	0	4	1	0









\*Excluding concerts

\*\*Visitors over 100 miles from stadium

Note: Ryan Field seating capacity listed is for the proposed rebuild, current capacity is 47,130

Sources: Johnson Consulting, Esri BAO, Placer AI, Facility websites

2023 Big 10 Case Studies

	Northwestern University 	Purdue University 	Rutgers University 	Michigan State University 	Indiana University 	University of Nebraska 	The University of Iowa 	Penn State University 
<b>Location</b>								
City	Evanston, IL	West Lafayette, IN	New Brunswick, NJ	East Lansing, MI	Bloomington, IN	Lincoln, NE	Iowa City, IA	State College, PA
CBSA	Chicago-Naperville-Elgin	Lafayette-West Lafayette	New York-Newark-Jersey City	Lansing-East Lansing	Bloomington	Lincoln	Iowa City	Huntingdon
# of Undergraduate Students	8,800	37,100	36,100	39,200	34,300	23,800	24,000	40,600
<b>City Demographics (2023)</b>								
Population	77,884	46,456	55,214	47,600	80,332	298,733	77,700	40,067
Median Household Income	\$87,412	\$33,343	\$48,244	\$43,323	\$41,705	\$63,710	\$57,676	\$38,006
Median Age	36.4	22.9	24.8	23.0	25.1	34.9	27.6	22.6
Total Number of Businesses	3,050	1,057	1,770	1,524	3,226	10,351	2,404	1,251
<b>CBSA Demographics (2023)</b>								
Population	9,584,302	227,226	20,181,143	542,762	162,627	349,931	181,419	43,566
Median Household Income	\$80,564	\$56,963	\$87,926	\$62,981	\$55,744	\$67,539	\$70,960	\$57,700
Median Age	38.1	32.2	39.5	38.1	33.0	35.7	33.0	43.3
Total Number of Businesses	314,714	6,471	727,844	17,773	5,377	11,967	6,268	1,478
<b>Stadium</b>								
Name	Ryan Field	Ross-Ade Stadium	SHI Stadium	Spartan Stadium	Memorial Stadium	Memorial Stadium	Kinnick Stadium	Beaver Stadium
Program	Northwestern Wildcats	Purdue Boilermakers	Rutgers Scarlet Knights	Michigan State University Spartans	Indiana Hoosiers	Nebraska Cornhuskers	University of Iowa Hawkeyes	Penn State Nittany Lion
Seating Capacity	35,000	57,236	52,454	75,005	52,929	90,000	69,250	106,572
Premium Seating Available	X	Planned for 2023	✓	✓	✓	✓	✓	✓
Naming Rights	Individual Donors - Patrick & Shirley Ryan	Ruoff Mortgage	High Point Solutions	MSUFCU	Fanfare Tickets	AKRS Equipment Solutions	-	-
Year Opened (Renovated)	1926 (1996)	1924 (2020)	1994 (2009)	1923 (2014)	1960 (2016)	1923 (2013)	1929 (2019)	1960 (2014)
Recent & Planned Improvements	Ryan Field Rebuild	Daktronics video board	Recruiting Pavilion and Welcome Center	Athletics facility, new locker rooms, improved entrance and restrooms	New carpeting, lighting, new bulkhead ceiling, new lockers	East Stadium expansion completed with new skyboxes, club seating, and general admission seating	Tunnel connecting the home locker room to the field was upgraded, with the addition of black and gold signage, lighting, and logos	Scoreboards changed
<b>Demand (2022)</b>								
Last 12 Months Total Stadium Visits	240,394	662,333	784,766	1,770,611	1,231,650	1,672,982	822,820	1,237,399
3-Year Total Average Attendance	152,520	548,208	499,335	1,070,151	805,520	1,241,729	587,899	913,908
% of Non-Local Visitors**	24%	35%	7%	16%	39%	19%	44%	46%
Average Football Game Attendance	28,697	57,129	50,756	69,047	46,906	86,637	69,250	107,379
Football Attendance % of Capacity	82%	100%	97%	92%	89%	96%	100%	101%
# of Annual Non-Football Events*	1	0	0	0	0	1	1	0
# of Annual Concert Events	0	2	0	0	0	1	1	0

\*Excluding concerts

\*\*Visitors over 100 miles from stadium

Note: Ryan Field seating capacity listed is for the proposed rebuild, current capacity is 47,130

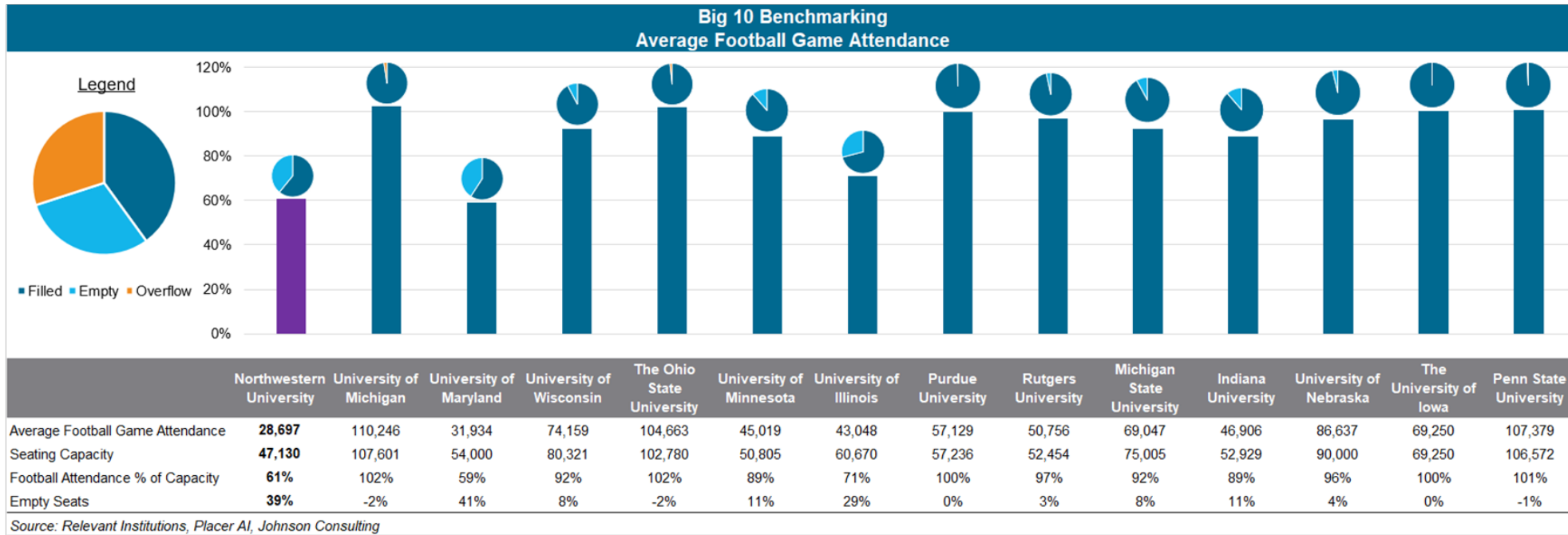
Sources: Johnson Consulting, Esri BAO, Placer AI, Facility websites

# BIG 10 BENCHMARKING

- The Big 10 Case Studies matrix shows:
  - Evanston is located in the second-most populated CBSA and offers the second-highest number of businesses (1<sup>st</sup> is Rutgers)
  - Northwestern has the lowest number of undergraduates enrolled
  - Northwestern is the only school without existing premium seating options; there are some planned premium seating options in the proposed rebuild
  - Ryan Field currently has the lowest seating capacity
  - Ryan Field has the oldest venue renovations; all other fields/stadiums were more recently updated
  - Ryan Field had the lowest average attendance in most recent years
  - All university stadiums support universities as a whole and are part of the overall student experience and tradition, so, if the University stays in Evanston, and if Northwestern University desires to compete with other schools in the Big 10 conference, it seems plausible that they would invest to improve the stadium experience for students, alumni, and fans.

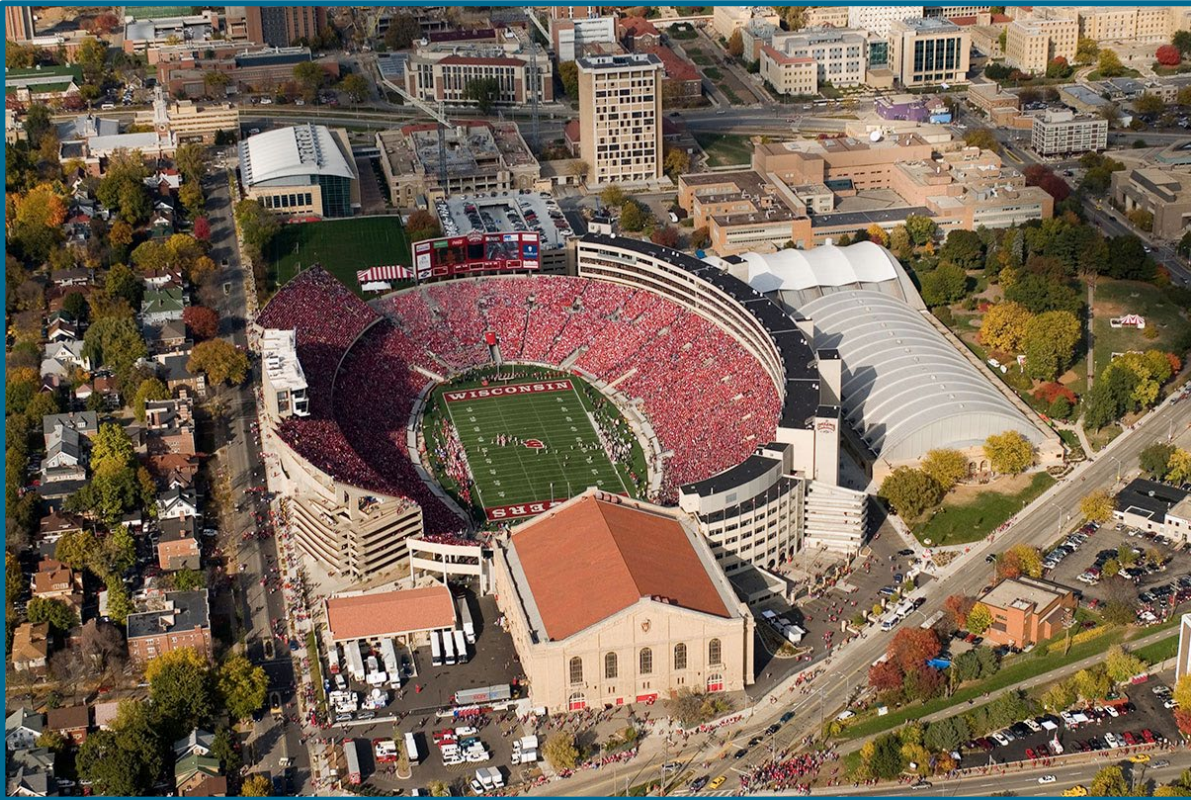


# BIG 10 BENCHMARKING



The Ohio State University and Penn State University have exceeded their stadium capacity during football games, while Northwestern has an average occupancy of 61 percent of Ryan Field during football games

# SPOTLIGHT: UNIVERSITY OF WISCONSIN



*Camp Randall Stadium*

- The University of Wisconsin's Camp Randall Stadium is similarly positioned to Ryan Field as it abuts residential neighborhoods
- Camp Randall attracted over 1.8M people over the last 12 months; the 3-year average being 1.3M
- 25 percent of visitors travel from over 100 miles away
- The fall schedule only includes Wisconsin Badgers football games; the most recent concert event held at Camp Randall was the Rolling Stones tour in 1997
- Recent stadium improvements include a new premium seating south end zone section, a new turf, and other small scale improvements around the stadium

# SPOTLIGHT: UNIVERSITY OF WISCONSIN

- Camp Randall has a seating capacity of 80,321
- There are 27,129 total businesses in the Madison CBSA and Camp Randall offers the following premium seating options each with a variety of viewing, food and beverage, and other comfort options:
  - Camp Randall Suites, Buckingham Club, Ford Varsity Club, Field Loge Boxes, Covered Loge Boxes, Open-Air Loge Boxes, Ledge Seats, Club Seats, Terrace Patio Seats, Terrace Patio Memberships, Touchdown Club Memberships, Group Seating, Roger Mansukhani & Family Terrace
- Average football game attendance is 74,159; 92 percent of the total stadium capacity



*Ford Varsity Club*



*Club Seats*



# SPOTLIGHT: UNIVERSITY OF WISCONSIN

- Using Placer AI to analyze visitation trends to Camp Randall Stadium in 2022, it was reported that there were over 2 million visitors throughout the year, 25 percent of which traveled from over 100 miles away. The average visitor frequented the stadium more than twice and stayed for an average of 150 minutes.
- Data also shows that- most visitors came from home and went home after, with some frequenting a bar or restaurant before or after
- The majority of visitors come from in and around Madison, as well as Milwaukee

## Camp Randall Stadium - 2022 Visitation



**716,700**  
Total Visitors



**150 Minutes**  
Average Dwell Time



**2.78**  
Visit Frequency



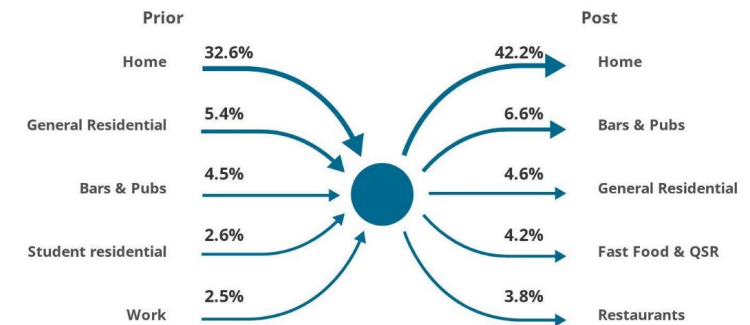
**2M**  
Total Visits



**25%**  
Non-Local Visitors

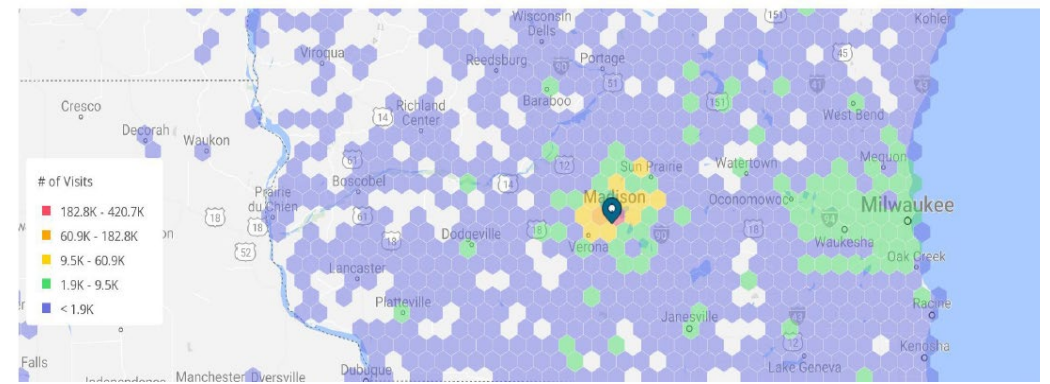
Source: Placer AI, Johnson Consulting

## Camp Randall Stadium - 2022 Visitor Journey



Source: Placer AI, Johnson Consulting

## Camp Randall Stadium - 2022 Visitation Heat Map



Source: Placer AI, Johnson Consulting

# SPOTLIGHT: UNIVERSITY OF MARYLAND

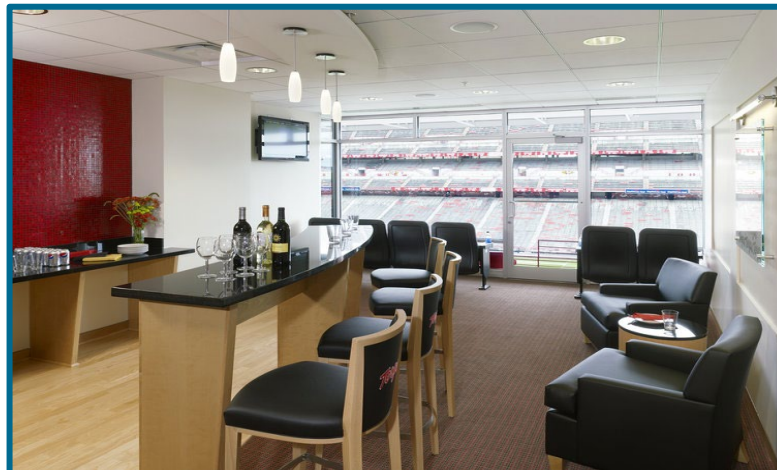
- The University of Maryland, located in College Park, MD compares most closely with Ryan Field in terms of City and CBSA demographic indicators. Ryan Field is located near Chicago and SECU Stadium is located near Washington D.C.
- SECU Stadium attracted nearly 640,00 people over the last 12 months; the 3-year average being 460,000
- 22 percent of visitors travel from over 100 miles away
- The fall schedule only includes Maryland Terrapin football games; other non-Terrapin football events that were historically held were other sporting events
- Last year, the football stadium was renamed from Capital One Stadium to SECU Stadium.
  - SECU (State Employees Credit Union of Maryland) will pay the university \$11 million over the course of 10 years, including a \$2.5 million gift dedicated to the construction of the new Barry P. Gossett Basketball Performance Center basketball practice facility.
- Other recent stadium improvements include updated lighting system, “CoolPlay” turf, and a new scoreboard



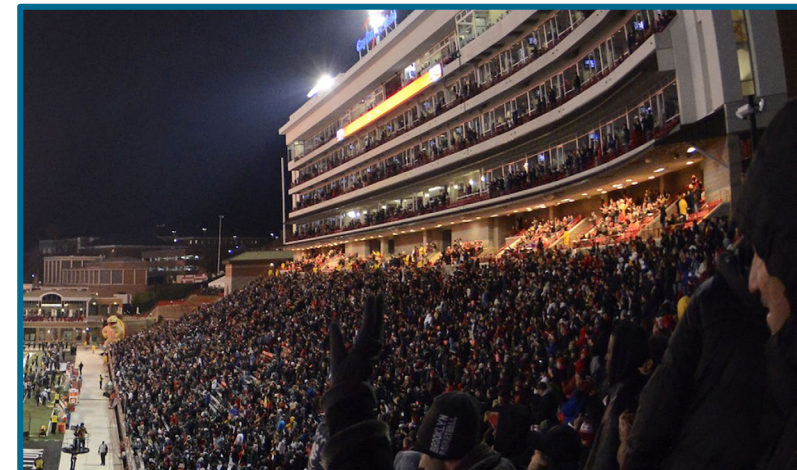
SECU Stadium

# SPOTLIGHT: UNIVERSITY OF MARYLAND

- SECU Stadium has a seating capacity of 54,000
- There are 222,784 total businesses in the Washington-Arlington-Alexandria CBSA and SECU Stadium offers the following premium seating options:
  - Luxury Suites at Tyser Tower → 61 luxury suites with a number of amenities
  - Mezzanine Seating → Located under Tyser Tower with a number of amenities
  - Pricing varies by game and length of lease
  - Average football game attendance is 31,934; 59 percent of the total stadium capacity



*Luxury Suites at Tyser Tower*



*Mezzanine Seating*



# SPOTLIGHT: UNIVERSITY OF MARYLAND

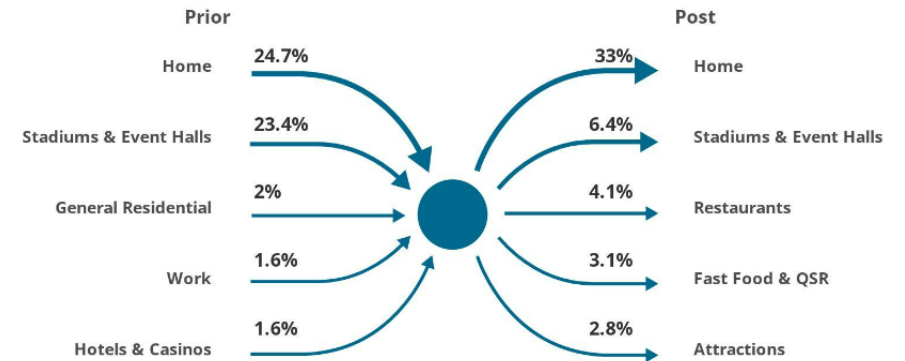
- Using Placer AI to analyze visitation trends to SECU Stadium in 2022, it was reported that there were over 684,000 visitors throughout the year, 22 percent of which traveled from over 100 miles away. The average visitor frequented the stadium more than twice and stayed for an average of 134 minutes.
- Data also shows that- most visitors came from home and went home after, with some tailgating around the stadium beforehand
- The majority of visitors come from in and around Washington and Baltimore

## SECU Stadium - 2022 Visitation



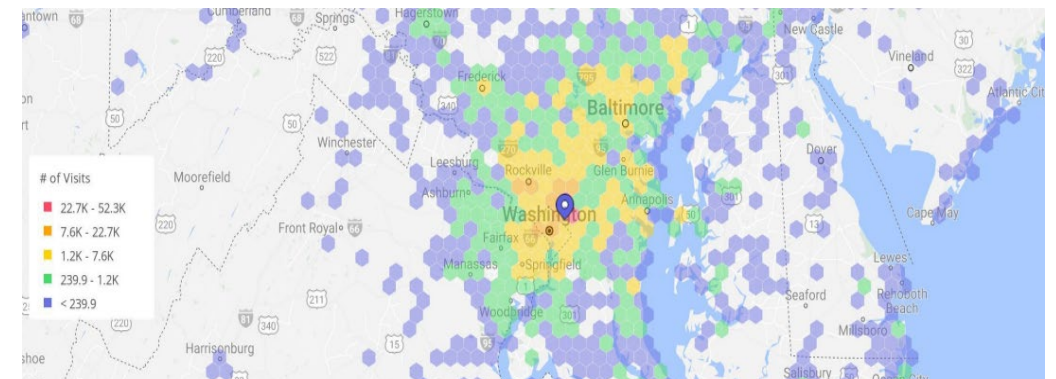
Source: Placer AI, Johnson Consulting

## SECU Stadium - 2022 Visitor Journey



Source: Placer AI, Johnson Consulting

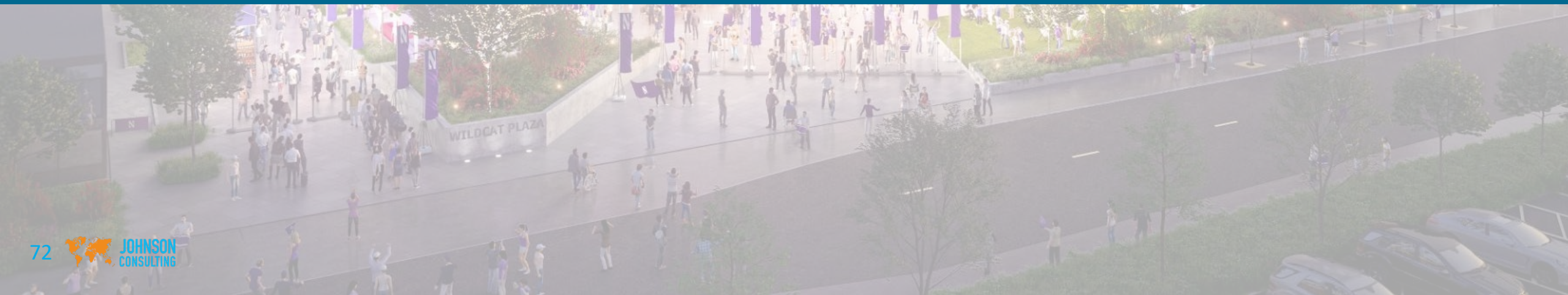
## SECU Stadium - 2022 Visitation Heat Map



Source: Placer AI, Johnson Consulting



# SEC 8. INDUSTRY TRENDS



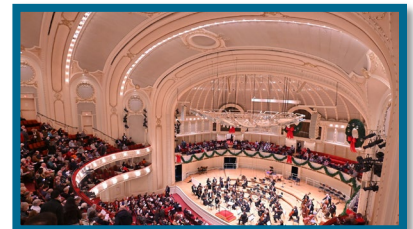
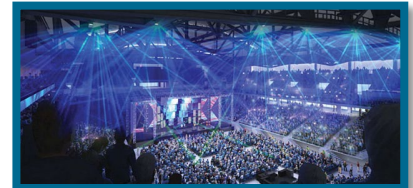
# INDUSTRY TRENDS

This report section provides an overview of industry trends for the event industry, primarily focused on stadiums and live events, such as concerts. Entertainment venues and event centers have long been at the forefront of live entertainment. While larger shows may take place in big stadiums or arenas, there are myriad events that thrive in a range of other smaller and purpose-built venues. Some of these events may include: multi-day music festivals, comedy shows, events like TED Talks, concerts, musical plays, dance productions, art and culinary events, and visual arts productions, among many others. Many people consider some combination of these entertainment offerings to be valuable to their community, and more importantly their overall quality of life. As an industry that supports millions of jobs and generates over \$166 billion of economic activity annually, it is easy to see why so many people support participation and funding for the arts.

While many understand the basics of performances such as comedy shows or concerts, theatrical, recitals, and dance productions, they prove to be more nuanced when it comes to the technical side of production and technical requirements. To help frame the different types of requirements, this section provides an overview of technical and operating trends for the performing arts and live entertainment industry.

# INDUSTRY TRENDS – VENUE TYPES

- **Festival Grounds:** Large outdoor spaces that often host multi-day music and arts festivals. Some festival grounds have permanent infrastructure and some require stages, restrooms, concessions, etc. to be set up and broken down for each event.
- **Amphitheaters:** Round or oval-shaped venues with tiered seating in front of a central stage. Amphitheaters are typically outside and are among the oldest types of performing arts venues.
- **Stadiums:** Typically used for sports such as baseball and football, concerts, and other large-scale entertainment events, stadiums are open-air venues elevated seating on one or more sides of a playing surfaces. For entertainment events, the stage is usually set up on part of the playing surface, with the rest of it sold as seating.
- **Arenas:** Similar to stadiums but generally smaller and indoors, arenas are typically used for entertainment events, as well as sports such as basketball and hockey.
- **Concert Halls:** Venues constructed specifically for classical music, with elevated and tiered seating sections and acoustics designed for symphony-orchestras.





# INDUSTRY TRENDS – TOP VENUES

The table on the top right shows the top amphitheater venues by 2022 ticket sales, while the table on the bottom right shows the top arena venues by 2022 ticket sales. These rankings are based on data from Pollstar, a trusted source for entertainment statistics, and includes ticket sales from January 1, 2022 – December 12, 2022. While both of these rankings include venues from around the world, the United States is well-represented. 8 of the top 10 amphitheater venues by ticket sales are in the United States, though the same can be said for only the 4 of the top 10 arena venues. The U.S. also has a significant concentration of music festivals, hosting 4 of the 10 largest by attendance in 2022, as is shown in the table below. The largest American music festival is Coachella, which welcomed 750,000 attendees in 2022.

Top Amphitheater Venues by Ticket Sales (2022)				
Rank	Venue	Location	Tickets Sold	Capacity
1	<b>Pine Knob Music Theatre</b>	Clarkston, MI	578,485	15,040
2	<b>The Cynthia Woods Mitchell Pavilion</b>	The Woodlands, TX	476,018	16,015
3	<b>Merriweather Post Pavilion</b>	Columbia, MD	394,514	19,316
4	<b>Ruoff Music Center</b>	Noblesville, IN	308,776	24,000
5	<b>Red Rocks Amphitheatre</b>	Morrison, CO	295,584	9,525
6	<b>Greek Theatre at UC Berkeley</b>	Berkeley, CA	270,456	8,500
7	Budweiser Stage	Toronto, Canada	269,899	16,000
8	<b>Hollywood Bowl</b>	Los Angeles, CA	264,965	17,500
9	Waldbühne Berlin	Berlin, Germany	258,281	22,290
10	<b>Gorge Amphitheatre</b>	George, WA	235,260	20,000

Source: Pollstar, Johnson Consulting

Includes ticket sales from January 1st, 2022 - December 12th, 2022

U.S. venues in bold

Top Festivals by Attendance (2022)				
Rank	Festival	Location	Attendance	Number of Days
1	Donauinselfest	Vienna, Austria	2,500,000	3
2	Montreal Jazz Festival	Montreal, Canada	2,000,000	10
3	<b>Coachella Music and Arts Festival</b>	<b>Indio, CA</b>	<b>750,000</b>	<b>6</b>
4	Rock in Rio	Rio de Janeiro, Brazil	700,000	7
5	Tomorrowland	Boom, Belgium	600,000	9
6	<b>Electric Daisy Carnival</b>	<b>Las Vegas, NV</b>	<b>475,000</b>	<b>3</b>
7	<b>New Orleans Jazz Fest</b>	<b>New Orleans, LA</b>	<b>475,000</b>	<b>7</b>
8	Primavera Sound Festival	Barcelona, Spain	460,000	11
9	Sziget Festival	Budapest, Hungary	450,000	6
10	<b>Summerfest</b>	<b>Milwaukee, WI</b>	<b>445,611</b>	<b>9</b>

Source: Music Festival Wizard, Various Festivals, Johnson Consulting

U.S. venues in bold

Top Arena Venues by Ticket Sales (2022)				
Rank	Venue	Location	Tickets Sold	Capacity
1	<b>Madison Square Garden</b>	<b>New York, NY</b>	<b>1,710,880</b>	<b>20,789</b>
2	<b>Kia Forum</b>	<b>Inglewood, CA</b>	<b>1,226,122</b>	<b>17,500</b>
3	Arena Monterrey	Monterrey, Mexico	1,103,693	17,500
4	The OVO Hydro	Glasgow, United Kingdom	1,058,073	14,300
5	WiZink Center	Madrid, Spain	987,323	17,453
6	Arena CDMX	Mexico City, Mexico	943,216	22,000
7	The O2 - London	London, United Kingdom	911,084	21,000
8	<b>Little Caesars Arena</b>	<b>Detroit, MI</b>	<b>878,885</b>	<b>20,000</b>
9	<b>Bridgestone Arena</b>	<b>Nashville, TN</b>	<b>815,926</b>	<b>20,000</b>
10	Lanxess Arena	Cologne, Germany	809,652	20,000

Source: Pollstar, Johnson Consulting

Includes ticket sales from January 1st, 2022 - December 12th, 2022

U.S. venues in bold

# INDUSTRY TRENDS – CONCERT INDUSTRY

- **Pollstar** published a 2023 report on national concert market rankings, showing Chicago ranked 4<sup>th</sup>.
- **ESRI Business Analyst** reported the total and average spending on concert tickets in 2023 and the forecasted spend for 2028.
- Both tables illustrate the health of the concert market in not only Chicago, but in Evanston as well. Residents in the local area and greater region have a high propensity to spend on concert tickets, further demonstrating a demand in the market.

2023 Pollstar Concert Market Rankings						
Rank	Market	2022 Reported Gross	2022 Reported Tickets Sold	2022 Average Ticket Price	2022 Reported Shows	2023 DMA Rank
1	New York	\$ 796,613,879	7,568,956	\$ 105.25	3,240	1
2	Las Vegas	518,813,927	3,420,314	151.69	966	40
3	Los Angeles	515,075,052	4,458,618	115.52	841	2
4	Chicago	295,681,068	3,291,100	89.84	1,207	3
5	San Francisco-Oakland-San Jose	276,405,667	3,029,716	91.23	803	6
6	Boston	241,196,035	3,007,936	80.19	1,756	9
7	Miami	207,883,962	1,812,116	114.72	399	16
8	Dallas-Ft. Worth	206,799,956	2,252,572	91.81	394	5
9	Seattle-Tacoma	199,495,942	2,377,347	83.92	1,137	14
10	Washington	194,070,404	2,642,273	73.45	1,789	7
11	Atlanta	170,879,598	2,088,706	81.81	748	10
12	Nashville	168,859,507	2,074,789	81.39	896	29
13	Philadelphia	164,812,261	2,013,176	81.87	811	4
14	Detroit	164,665,824	2,140,552	76.93	430	13
15	Houston	138,209,762	1,374,414	100.56	439	8
16	Denver	134,568,071	1,569,758	85.73	412	17
17	Minneapolis-St. Paul	129,671,417	1,964,182	66.02	974	15
18	Orlando-Daytona Beach	125,388,650	1,309,441	95.76	332	18
19	Phoenix	118,125,380	1,341,434	88.06	364	12
20	Tampa-St. Petersburg	110,729,314	1,272,964	86.99	480	11

Source: Pollstar

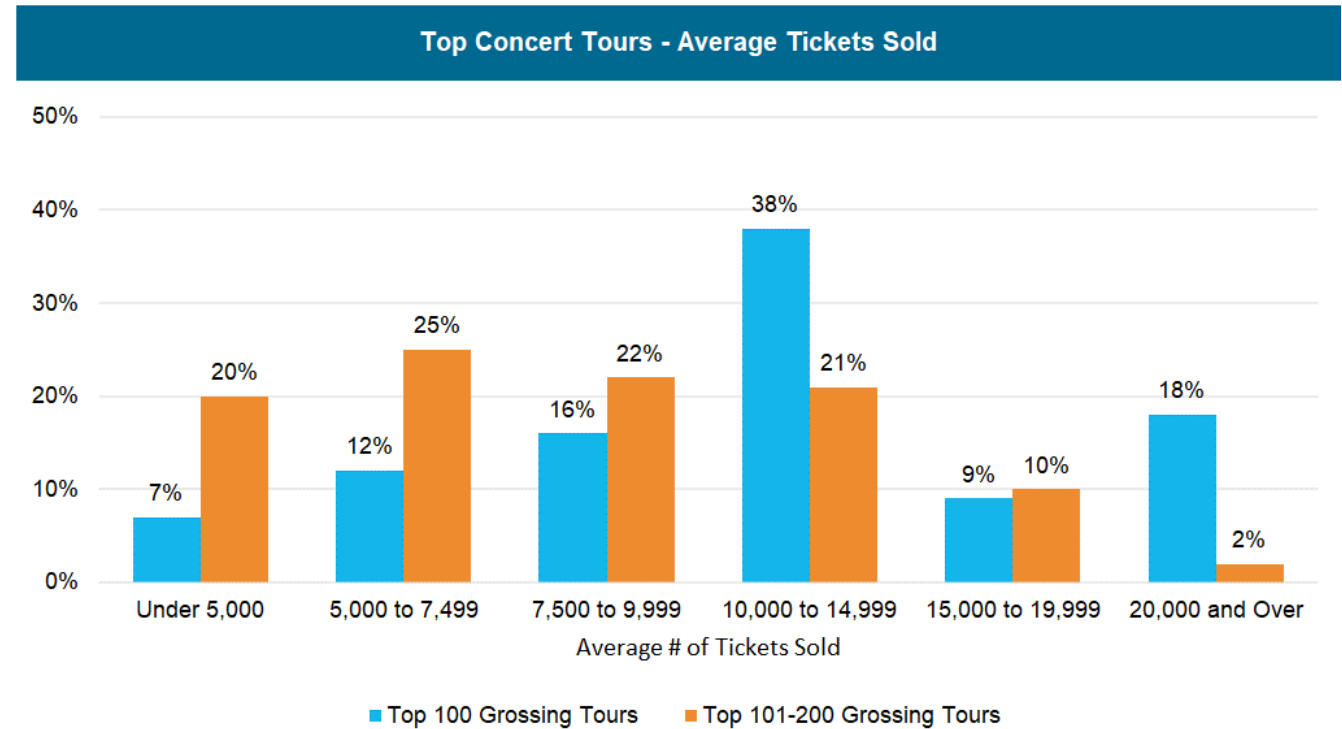
Location	Spending on Concert Tickets			
	2023		2028	
	Total	Average Per Household	Total	Average Per Household
<b>United States</b>	\$ 7,089,595,192	\$ 55	\$ 8,284,082,133	\$ 62
<b>Chicago</b>	\$ 63,098,531	\$ 55	\$ 73,061,726	\$ 63
<b>Evanston</b>	\$ 2,408,166	\$ 76	\$ 2,736,760	\$ 86

Source: Esri BAO, Johnson Consulting



# INDUSTRY TRENDS – CONCERT INDUSTRY

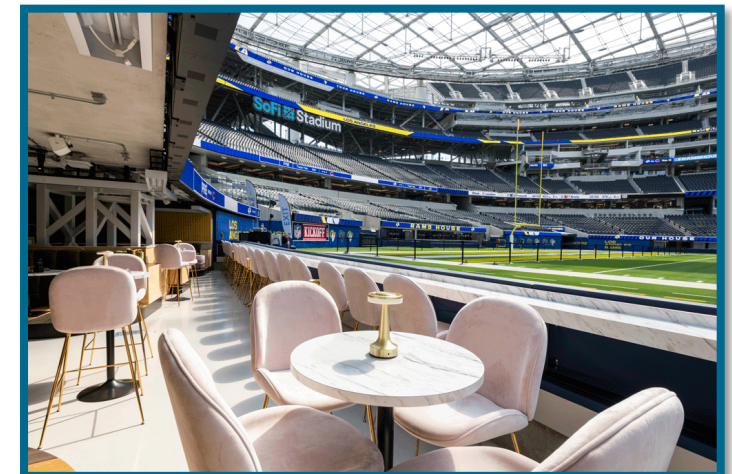
- **Pollstar** published a 2023 report on average tickets sold for the top 200 grossing tours
  - As shown, the majority of top concerts sell under 15,000 tickets



Source: Pollstar, Johnson Consulting

# INDUSTRY TRENDS – PREMIUM EXPERIENCE

- In recent years, more and more entertainment venues have been offering donor premium spaces and experiences in addition to typical seating options. These experiences can take many forms, with some common ones being dedicated VIP seating or standing sections (often with more comfortable seats), amenities such as higher-quality food and beverage options, dedicated restrooms and lounges, and backstage access where VIPs get to spend time before or after the show and even, in some cases, meet the entertainer or artist. VIP experiences provide venues the opportunity to sell premium tickets, often at multiple times the price of normal tickets, and serve customers who are interested in paying more for better experiences. They also provide sponsorship and partnership opportunities between venues and premium brands.



## INDUSTRY TRENDS – LIVE NATION & THE TALENT INDUSTRY

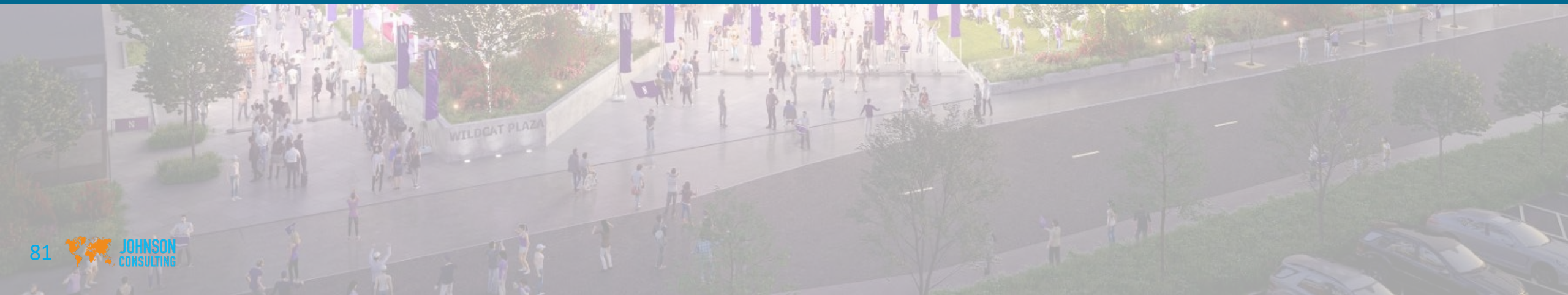
- Smaller venues of 500 to 5,000 seats are an important component of the entertainment industry. As Live Nation has gained dominance in the thinner market of large venues, the regional or smaller promoter has changed format. In order to adapt and survive, many of the local promoters are turning to smaller venues (500 to 5,000 seats) as baby boomers, Generation X, active adults and other attendee categories are finding entertainment events and facilities more enjoyable at this scale. Many of these promoters, both for profit and not for profit, are returning to subscription-based pricing strategies such as buy one get one free, or a mega ticket that can include parking costs along with access to a multi-day event, all for one price.
- Many facilities are municipally operated and are provided as a service to residents, as well as a way to attract out of town visitors. Universities and the private sector also build facilities. While many shows at the larger venues can do well, the number of acts available for these large venues limits the product. The number of small venues and acts is on the rise and the product diversification and more intimate atmosphere in a smaller venue have helped this sector of the live entertainment business grow.

# IMPLICATIONS

- The arts and entertainment industry is a billion dollar industry and will likely have positive economic impacts to the Evanston community.
- The proposed concert events in Evanston will be on a smaller scale relative to the number of concert events and type of concert events, as compared to a larger market such as Chicago. That said, an effective management team will be key to attracting concert events to Ryan Field.
- It will be important to consider features such as VIP experiences, quality food and beverage, excellent customer service, and a trusted venue management/ event promotion entity.



# APPENDIX A – PARKING STUDY MEMORANDUM





## MEMORANDUM

**DATE:** August 25, 2023

**TO:** Riane Federman

**FROM:** Gerald Salzman

**RE:** Ryan Field Rebuild - Parking Study Review

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The purpose of this memorandum is to summarize the results of a review of the Ryan Field Concert Venue traffic and parking study, prepared by Kimley Horn, dated April 2023 submitted by Northwestern University to the city of Evanston. This analysis focuses on the parking and transit portions of the study. Recently the University has reduced the projected number of events. This study also relies on some of the information contained in the WGI "Parking Study City of Evanston, IL" dated June 2022 and the "Ryan Field Redevelopment Project Narrative".

### *Scope of Services*

This study effort consisted of seven tasks.

- Comparison of existing and proposed events
- Estimated attendance
- Parking needs for typical concerts and high school events
- Discussion of Mode split
- Parking supply and demand
- Shuttle needs
- Conclusions and Recommendations

### *Number of Events*

The existing Ryan Field seats 47,000 spectators for football. There are few if any other events at the stadium. The proposed stadium would be reduced to 35,000 seats for football and approximately 28,500 for concerts based on the Project Narrative submitted to the City of Evanston. There would also be 1,365 surface parking spaces on site. In addition to the 7 football games, the redeveloped Ryan Field was projected by the April 2023 study to have 10 large concerts, 5 high school sports events and 2 other ticketed events. The number of concert events has been reduced by the University from 10 to 6. This reduction is shown in **Table 1**.

Football – The Ryan Field Operations data projected that football attendance would average 24,276 rather than current 31,863. This reflects the assumption that with the reduced size of the stadium, attendance at the high attendance events (Ohio State, Michigan etc.) would be reduced bringing the average attendance down. While that may be a reasonable assumption, it is hard to imagine that with 35,000 seats remaining that the average could be reduced by over 7,500. In Table 1, we have maintained the current 2019 average which approximates the 5-year average.



**Table 1 Existing and Projected Activity and Attendance at Ryan Field**

	# of Events	2015-19 Average	Total Annual	Projected # of Events	Projected Average	Projected Total
Football	7	31,863	223,041	7	31,863	223,041
Concerts	0	-	-	6	28,000	168,000
High School Sports	0	-	-	5	8,000	40,000
Other Ticketed	0	-	-	2	8,000	16,000
Catered Events	0	-	-	150	200	30,000
<b>Total</b>	<b>7</b>	<b>31,863</b>	<b>223,041</b>	<b>170</b>		<b>477,041</b>
<b>Total w/out Catering</b>	<b>0</b>	<b>-</b>	<b>-</b>	<b>24</b>	<b>18,627</b>	<b>447,041</b>

Assumes that current average attendance will continue not the 24,276 estimated originally  
Source: Ryan Field Operations Data

Concerts – Concerts are a new venture for Ryan Field. Projections suggest that maximum attendance would be 28,000 although the Traffic Impact Study is based on 28,500. The number of projected events has been reduced from 10 to 6 per year.

High School Sports and other ticketed events – It is planned that there would be seven High School Sports or other Ticketed Events each year with an attendance of 8,000 at each.

Catered Events – The largest number of events would be 150 small catered events for an average attendance of 200 people. These events can be easily accommodated on site and present few transportation problems.

Since the 7 largest events are already in place at Ryan Field and most of the other events have smaller attendance, the remainder of this analysis focuses on the transportation requirements of the concerts.

*Concert Transportation*

Our analysis of the impact of the use of Ryan Field as a concert venue is largely based on the Kimley-Horn “Concert Venue Traffic Impact Study”, April 2023. Our principal finding is that while technically accurate in identifying the magnitude of the problem, it does little or nothing to mitigate the impact. What solutions they offer are not accompanied by a feasible implementation plan. These issues are discussed below.

The study identified 7,562 parking spaces on and off-site of which they assumed 6,522 would be available for concert parkers. See **Table 2**. We would suggest that the 80% availability of off-site parking be confirmed at the times when concerts would likely be held (weekday and primarily weekend evenings).

The study also estimated the mode split for concert attendees. As shown in **Table 3** 52% of attendees would drive and park, 30% by CTA, 10% by Metra and 5% by Taxi/TNC. Given this mode use, we translated the mode split into attendance by mode. Column 3 shows that of the 28,000 attendees 14,560 would come by car, 8,400 by CTA and 2,800 by Metra, etc. We then translated the attendance into number of vehicles required. This identifies 5,824 parkers (at 2.5 per car), 11 CTA 6 car trains, 2 10 car Metra trains, and 681 pickup and drop offs each of which needs to be accommodated simultaneously. According to the traffic impact study 85% of the attendees need to be accommodated in the peak hour after the event. That calculation is shown in the right most column.

Table 2 Available Parking Spaces for Concerts

Parking Supply		Spaces
On site		
West Lot		901
East Lot		415
	<i>On-site Total</i>	<i>1,316</i>
Canal Shores		
Lot #1		200
Lot #3 North		150
Lot #11		200
Lot #12		300
	<i>Canal Shores Total</i>	<i>850</i>
Poplar Avenue (Metra)		200
	<i>Metra Total</i>	<i>2,366</i>
Off-Site Downtown		
Maple Street Garage		1,400
Sherman Street Garage		1,583
Church Street Garage		600
	<i>Sub-total</i>	<i>3,583</i>
	<i>80% available</i>	<i>2,866</i>
Off-Site Northwestern Campus		
North Campus Garage		500
South Campus Garage		621
Tennis Court lot		161
Field Hockey Lot		182
Northwestern Place Lot		149
	<i>Sub-total</i>	<i>1,613</i>
	<i>80% available</i>	<i>1,290</i>
<b>Total Parking Available for Concert</b>		<b>6,523</b>

Source: Concert Venue Traffic Impact Study

**Table 3 Concert Attendees by Mode of Travel**

Travel Mode	Share	Riders	People per Car/train	Cars per train	Total People per trip	Trips	85% in Peak Hour
Auto & Park	52%	14,560	2.5	1	2.5	5,824	
CTA Purple line	30%	8,400	123	6	738	11	10
Metra	10%	2,800	148	10	1,480	2	2
Taxi/ TNC	5%	1,400	3	1	3	560	476
Limo/Black Car	1%	280	3	1	3	112	95
Party Bus	1%	280	30	1	30	9	8
Ped/Bicycle	1%	280	1	1	1	280	238
<b>Total</b>	<b>100%</b>	<b>28,000</b>					

Columns 1 - 3 Source:Kimley Horn Concert Venue Traffic Impact Study

Column 4 source: DESMAN CTA, Metra

This analysis shows that in the peak hour 5,824 parked cars need to be accommodated along with 10 CTA trains, 2 Metra trains and 579 pickup and drop off vehicles. The traffic study suggests two areas for pick up and drop off. We believe a more detailed pickup and drop-off plan should be developed in coordination with the space needs of the other modes.

The questions that need to be answered include:

Can the CTA provide 10 6 car trains in the hour after an event?

Can Metra provide 2 10 car trains in the hour after an event?

Will there be enough space to accommodate the loading of 579 Taxi's limos and TNC's in a geofenced area in the hour after an event? This would average 10 per minute.

We would suggest that the loading and unloading of all modes be shown on a single site plan to show how they would be accommodated in the area around the stadium.

The biggest issue is the transportation of parkers from off-site locations to and from the stadium. As shown in **Table 4**, of 14,560 attendees arriving by car, assuming there are 2,366 spaces available onsite or in walking distance (1316 + 850 + 200), there would be 5,915 walking from their cars. The remaining 3,458 would be parking remotely. This would represent 8,645 attendees (2.5 per car). Assuming 50 attendees per bus and 85% in the peak hour, this represents the need for 147 bus trips in the peak hour. This means that 2.5 buses must depart from the stadium per minute after an event. With three minutes to load each bus, at least 7 or 8 busses would need to be loading on the curb front consistently throughout the hour (3\*2.5=7.5).

We also calculated the number of buses needed to accommodate 8,645 attendees parking remotely. Under nearly ideal conditions, each bus trip requires 3 minutes to load, at least 8 minutes to drive to the garage, 3 minutes to unload and another 8 minutes to return to Ryan Field. This is a total of 22 minutes per trip (50 passengers). To accommodate the 147 bus trips required in the peak hour would require 51 buses to make 3 trips each. The choreography required while possible theoretically would require extraordinary staffing and marshalling at the originating end. This is especially true because with three garages being used to accommodate the parkers, there will be confusion by attendees as to which bus they should be taking. A much more detailed operating plan is required.

We would also suggest a review of elevator capacity at the garages.

**Table 4 Bus Capacity and Demand**

Category	Calc.	Number
Attendees by Auto	52%	14,560
Walking Distance Parking Spaces	2,366	2,366
Attendees per car	2.5	2.5
Walking Distance Attendees	2366*2.5	5,915
Off-site Attendees	14560-5915	8,645
Bus Capacity	50	50
Number of Bus Trips	8645/50	173
85%	173*85%	147
Bus loading time	3 min	3
Travell time to downtown	8 min	8
Unloading time	3 min	3
Return time	7 min	7
Total time per trip	Sum	21
Trips per hour.	60/SUM	3
# of busses needed	85% #/3	<b>51</b>

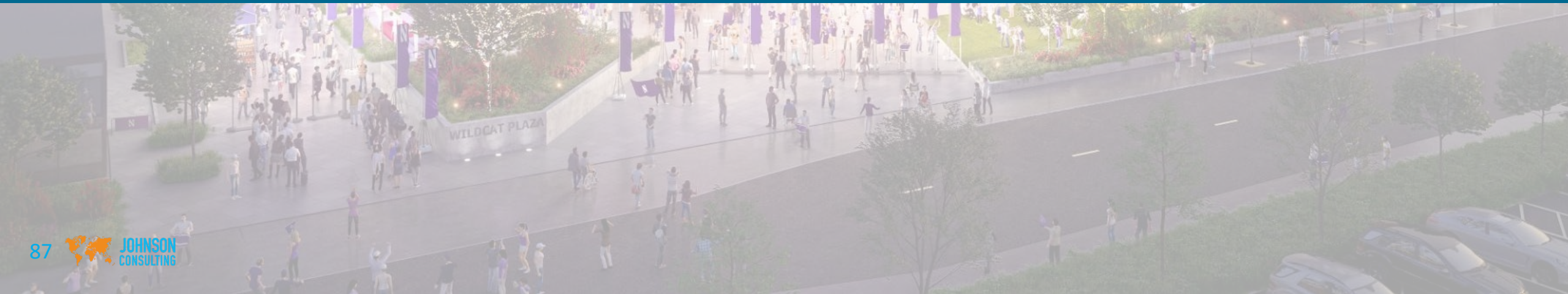
Source: DESMAN

*Conclusion*

There are a number of questions that remind unanswered in the transportation analysis. We recommend that the transportation analysis be reworked and a detailed operations plan be offered for a concert event to provide confidence that the attendees can be accommodated successfully.

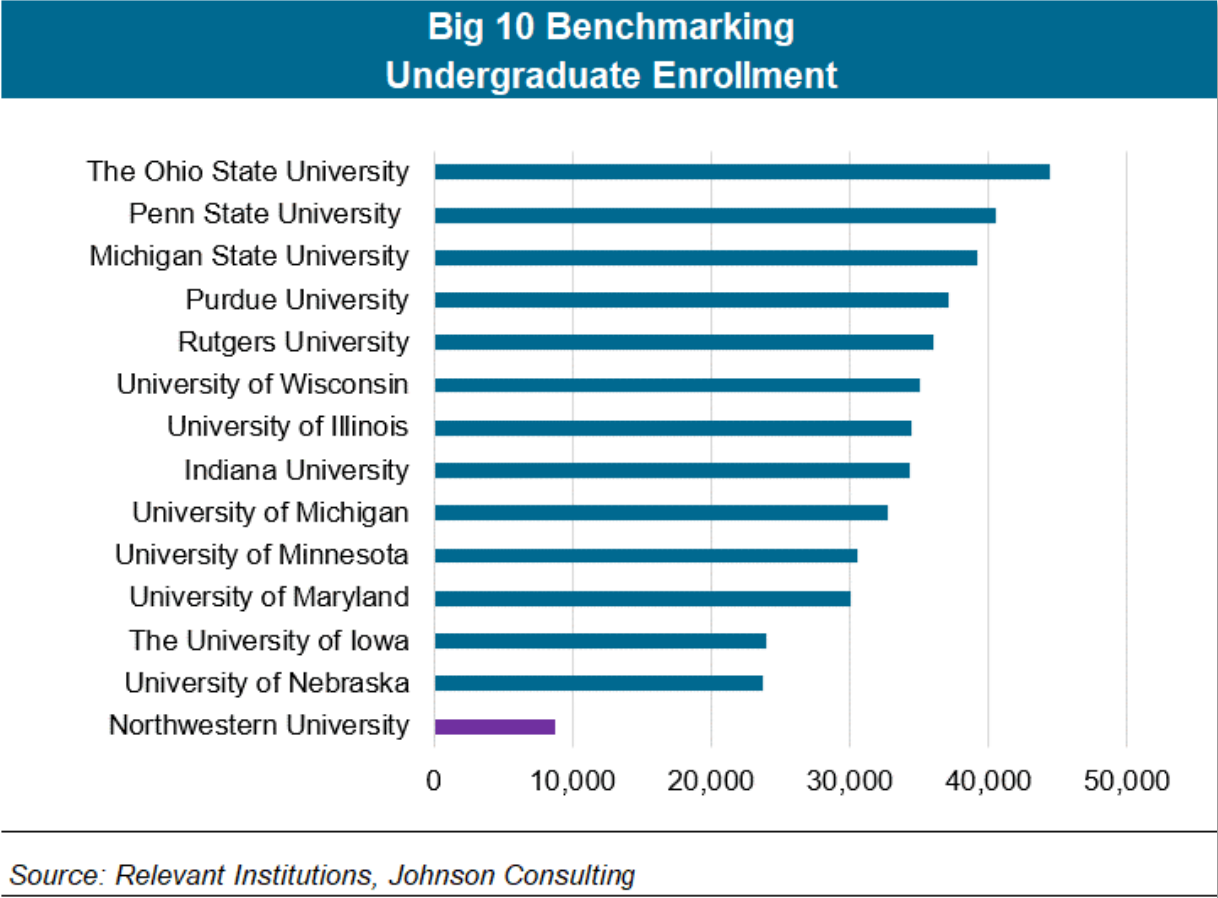


# APPENDIX B – BIG BENCHMARKING



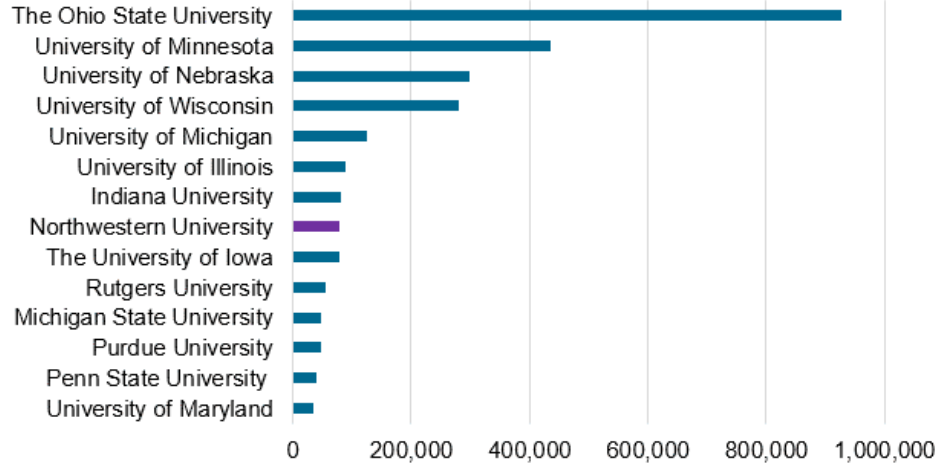
# UNDERGRADUATE ENROLLMENT

Northwestern has the lowest undergraduate enrollment.



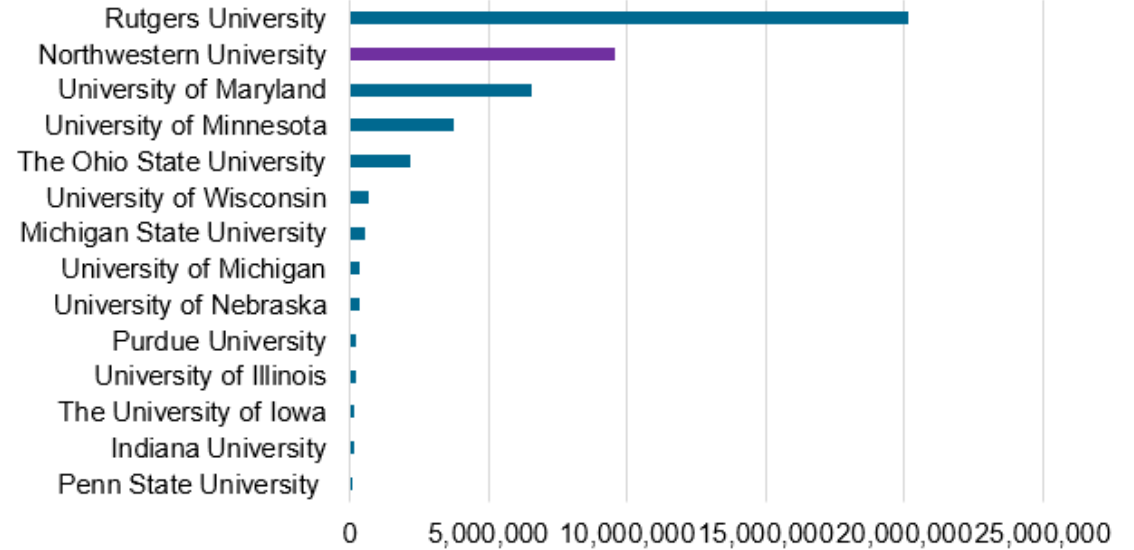


### Big 10 Benchmarking Population (City)



Source: Relevant Institutions, Johnson Consulting

### Big 10 Benchmarking CBSA Population

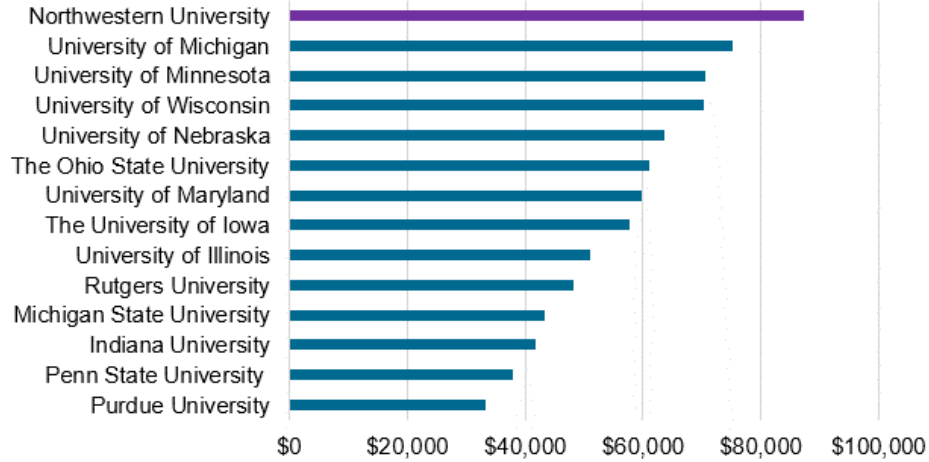


Source: Relevant Institutions, Johnson Consulting

## POPULATION

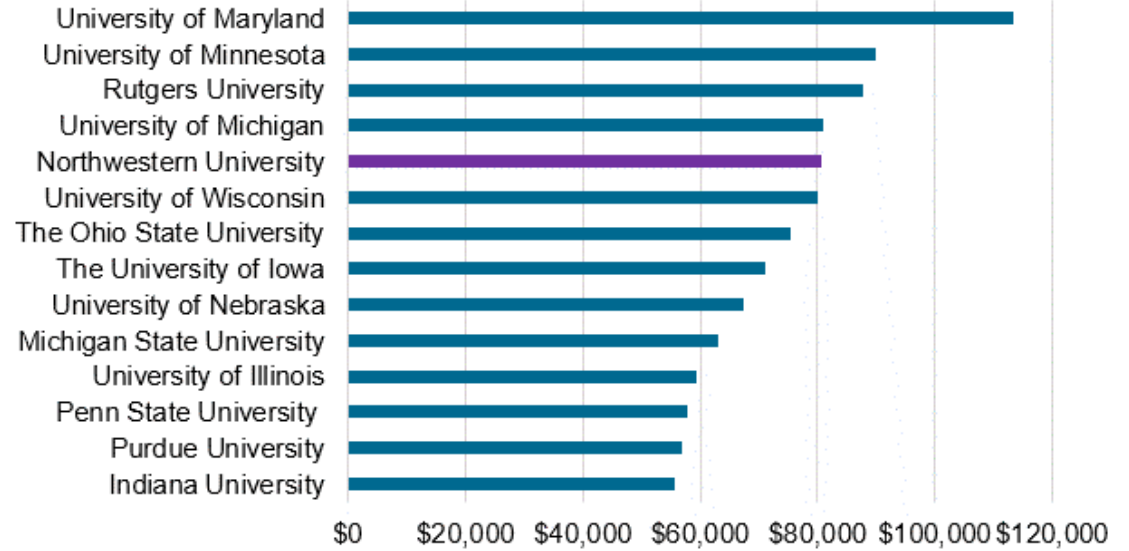
Northwestern has the second most populous CBSA behind Rutgers, which pulls from New York.

### Big 10 Benchmarking Median Household Income (City)



Source: Relevant Institutions, Johnson Consulting

### Big 10 Benchmarking Median Household Income (CBSA)

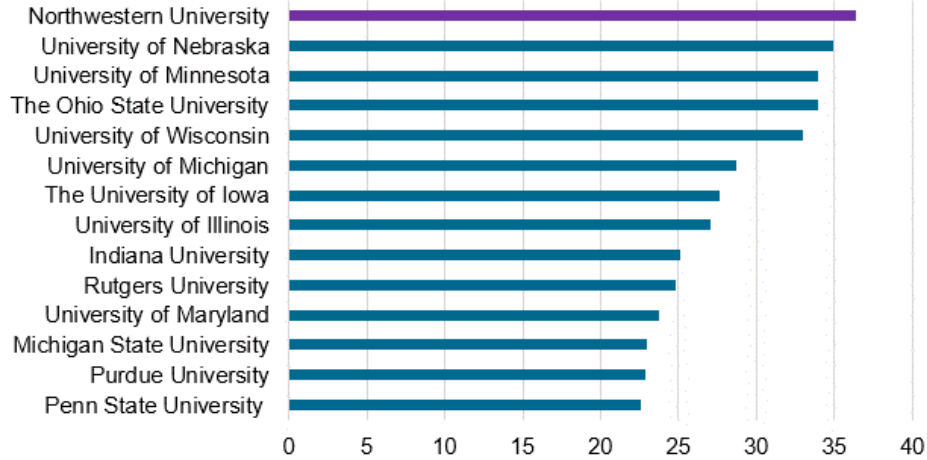


Source: Relevant Institutions, Johnson Consulting

## INCOME

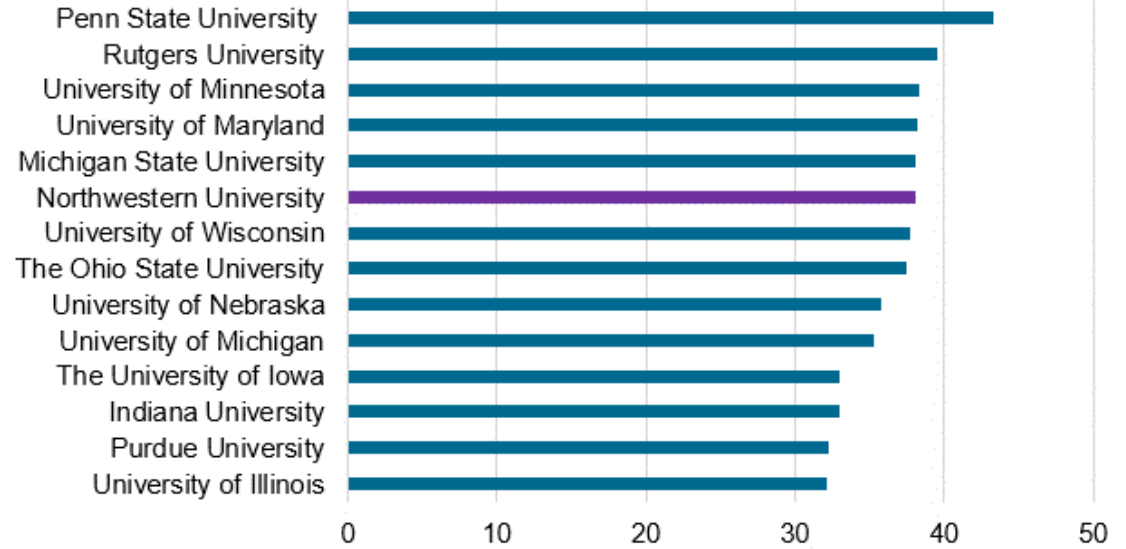
Evanston has the highest median household income, while the CBSA ranks 5<sup>th</sup> highest.

### Big 10 Benchmarking Median Age (City)



Source: Relevant Institutions, Johnson Consulting

### Big 10 Benchmarking Median Age (CBSA)

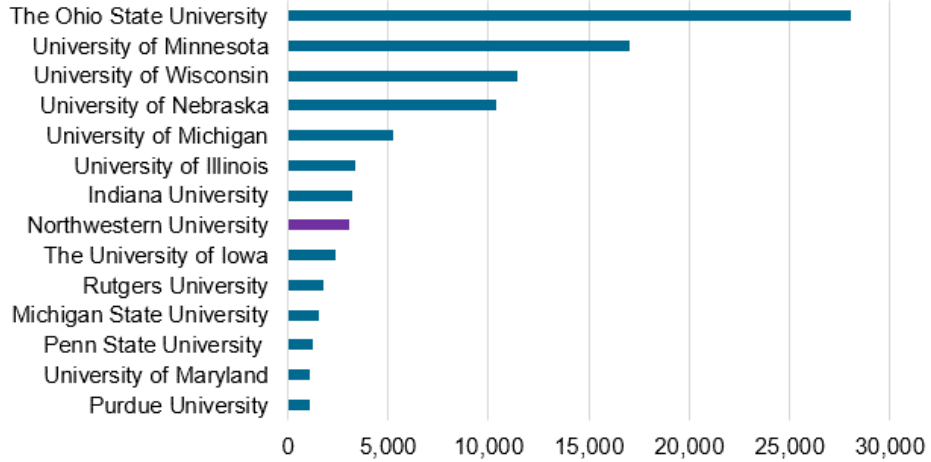


Source: Relevant Institutions, Johnson Consulting

## AGE

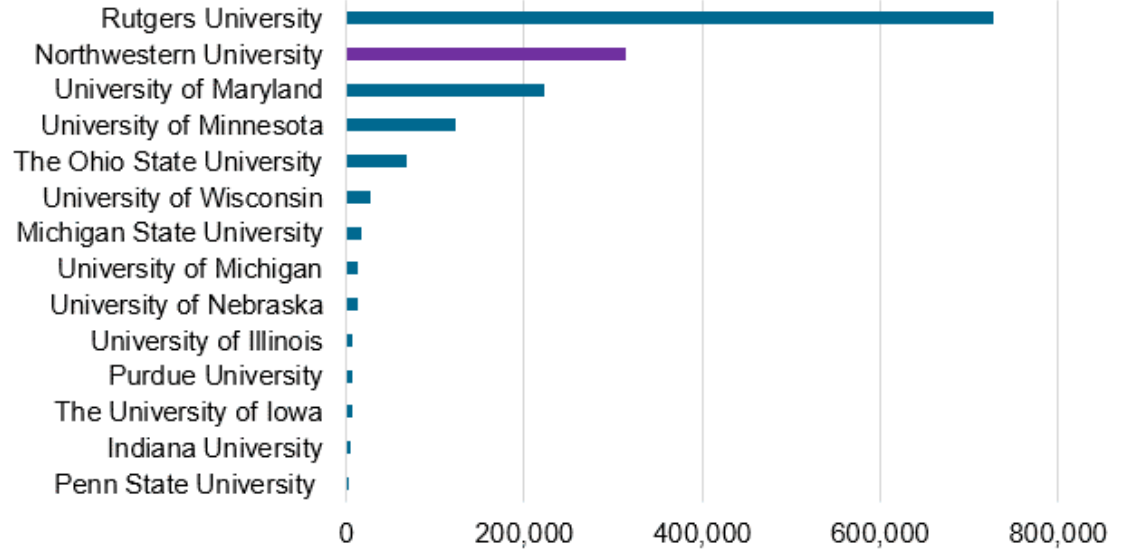
Evanston has the highest median age, while the CBSA ranks 6<sup>th</sup> oldest.

### Big 10 Benchmarking Total # of Businesses (City)



Source: Relevant Institutions, Johnson Consulting

### Big 10 Benchmarking Total # of Businesses (CBSA)



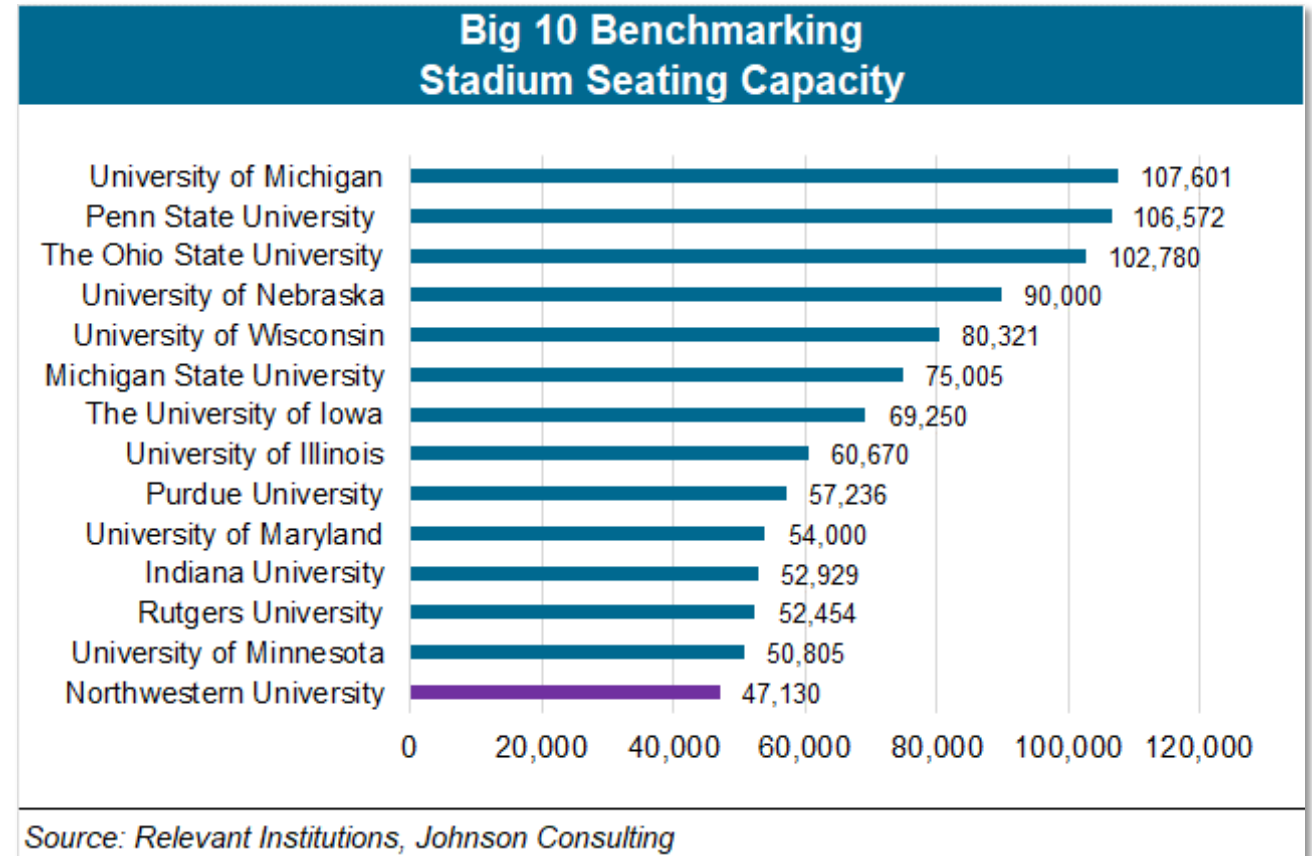
Source: Relevant Institutions, Johnson Consulting

## BUSINESSES

Evanston pulls from the Chicago-Naperville-Elgin CBSA, resulting in the 2<sup>nd</sup> highest total number of businesses.

## STADIUM CAPACITY

Ryan Field offers the least amount of seating capacity. The Ryan Field Rebuild would further reduce seating.





## PREMIUM SEATING

While there is some premium seating planned for the proposed rebuild, Ryan Field is one of two stadiums without current premium seating options, but has the 2<sup>nd</sup> highest number of businesses in the CBSA.

Big 10 Benchmarking Premium Seating		
School	Offered	Planned
<b>Northwestern University</b>	✗	✓
University of Michigan	✓	
University of Maryland	✓	
University of Wisconsin	✓	
The Ohio State University	✓	
University of Minnesota	✓	
University of Illinois	✓	
Purdue University	✗	✓
Rutgers University	✓	
Michigan State University	✓	
Indiana University	✓	
University of Nebraska	✓	
The University of Iowa	✓	
Penn State University	✓	

*Source: Relevant Institutions, Johnson Consulting*

## NAMING RIGHTS

Ryan Field is named after the Ryan family, recognized for leadership and contributions to Northwestern, however, there is a lack of corporate sponsorships and partnerships at the stadium.

Big 10 Benchmarking Naming Rights	
School	Existing Partnership(s)
<b>Northwestern University</b>	✓
University of Michigan	✗
University of Maryland	✓
University of Wisconsin	✓
The Ohio State University	✓
University of Minnesota	✓
University of Illinois	✗
Purdue University	✓
Rutgers University	✓
Michigan State University	✓
Indiana University	✓
University of Nebraska	✓
The University of Iowa	✗
Penn State University	✗

*Source: Relevant Institutions, Johnson Consulting*

## RECENT RENOVATIONS

Ryan Field was the last renovated stadium in 1996. The second last renovation was in 2010 at the University of Michigan, a 14 year difference.

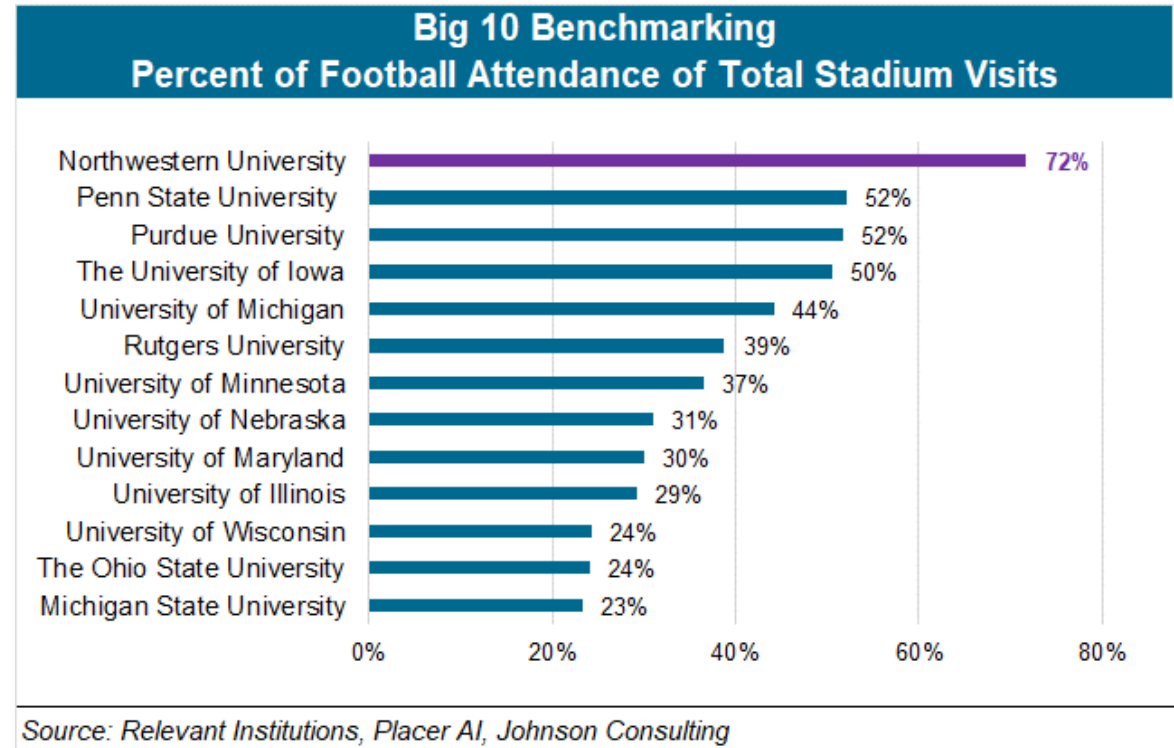
### Big 10 Benchmarking Most Recently Renovated

School	Year
<b>Northwestern University</b>	1996
University of Michigan	2010
University of Maryland	2012
University of Wisconsin	2022
The Ohio State University	2014
University of Minnesota	2021
University of Illinois	2013
Purdue University	2020
Rutgers University	2009
Michigan State University	2014
Indiana University	2016
University of Nebraska	2013
The University of Iowa	2019
Penn State University	2014

*Source: Relevant Institutions, Johnson Consulting*

## FOOTBALL ATTENDANCE

Ryan Field had the highest percentage of attendance that can be attributed to football games compared to non-football events.



## EVENTS

The table at right shows the inventory of non-football public events at each Big 10 Stadium.

Big 10 Benchmarking Average Annual Non-Football Events		
School	# of Annual Non-Football Events	# of Annual Concert Events
<b>Northwestern University</b>	<b>1</b>	<b>0</b>
University of Michigan	1	0
University of Maryland	2	0
University of Wisconsin	2	0
The Ohio State University	2	4
University of Minnesota	0	1
University of Illinois	0	0
Purdue University	0	2
Rutgers University	0	0
Michigan State University	0	0
Indiana University	0	0
University of Nebraska	1	1
The University of Iowa	1	1
Penn State University	0	0

*Source: Relevant Institutions, Johnson Consulting*



## VISITOR PROFILE

Of all Ryan Field attendees in the last 12 months, 24 percent of visitors were from over 100 miles away, ranking in the lower half of the 14 Big 10 schools.

