



City of Ottawa, Illinois

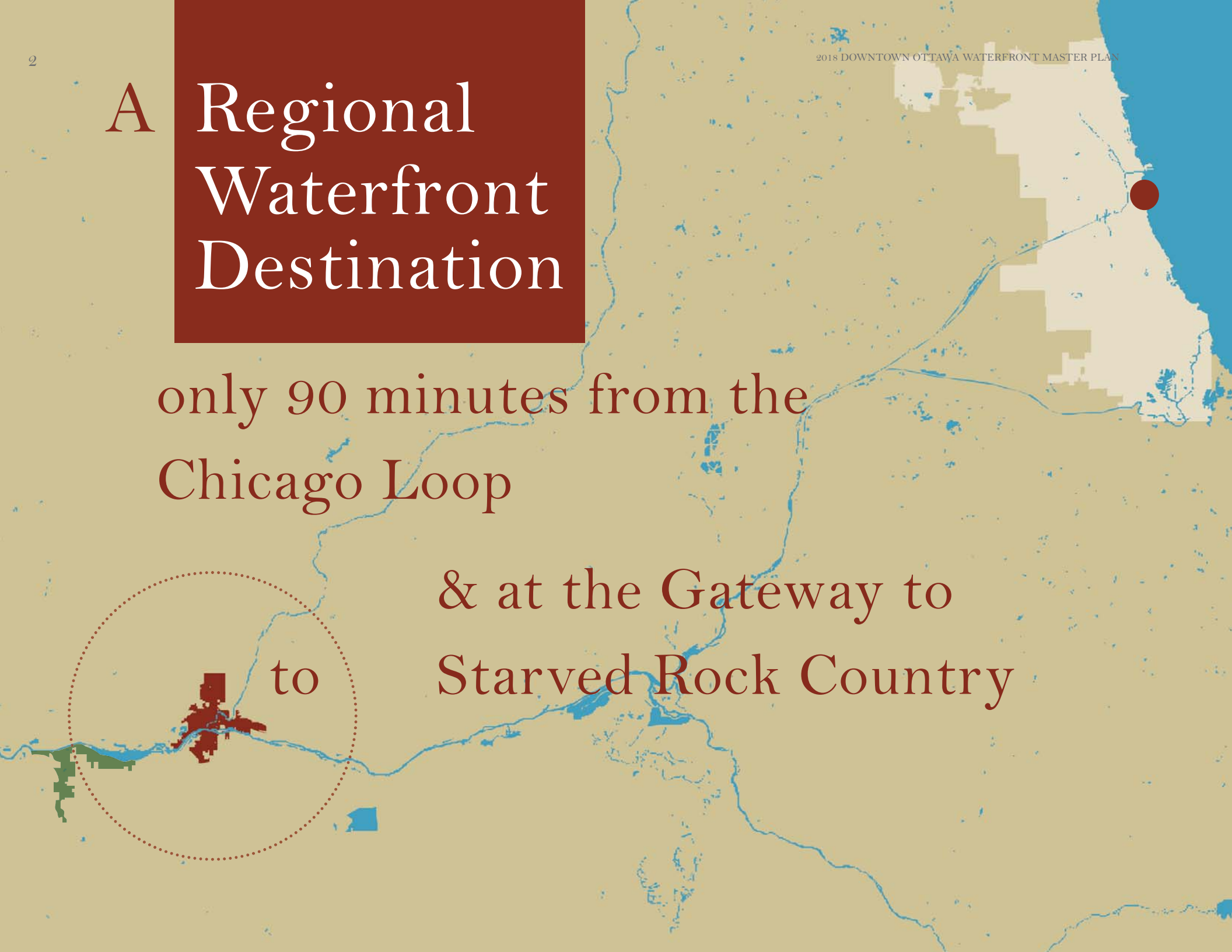
2016 Downtown Waterfront Master Plan

A Regional Waterfront Destination

only 90 minutes from the Chicago Loop



& at the Gateway to Starved Rock Country



2016 Downtown Ottawa Waterfront Master Plan

City of Ottawa, Illinois

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Prepared by
Hitchcock Design Group



with
Ginkgo Planning & Design, Inc.
Market & Feasibility Advisors





2013 view of the Waterfront Area at the confluence of the Fox and Illinois Rivers,
showing the now demolished Central School building

A Catalytic
Opportunity for
Ottawa's Economy



Plan Summary

1



Community Vision for the Downtown Waterfront

2014 Comprehensive Plan

Ottawa's leaders have long understood the value of their exceptional downtown assets. Fortunately for the community, as a direct result of decades of passionate nurturing by committed leaders and countless citizens, downtown Ottawa is uncommonly vibrant compared to its peers.

Located at the confluence of the Fox and Illinois Rivers, downtown Ottawa has endured more than its share of seasonal flooding, and as a result of extensive flooding in 1996, 1998, 2002 and 2008, city leaders acquired the Central School site, a strategic property that separated downtown from the Illinois River. In the 2014 Comprehensive Plan Ottawa enthusiastically embraced the economic, recreational and cultural potential of an expanded downtown riverfront, and urged leaders to further explore its powerful potential.

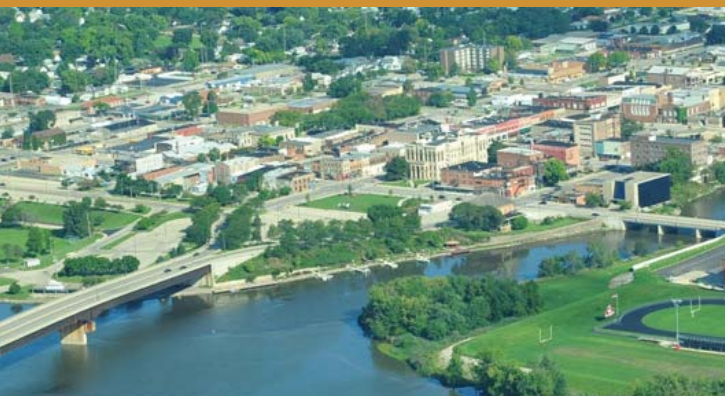
In 2015, City leaders engaged Hitchcock Design Group, in collaboration with Comprehensive Plan author Ginkgo Planning and Design, to define the newly coined "waterfront district" in greater detail. In particular, Hitchcock Design Group was asked to determine the appropriate district framework to guide long-term public policy and investment, and to establish a mass grading concept for short-term implementation in conjunction with grant-funded site remediation.

As the Hitchcock Design Group team advanced its assignment, they confirmed the community's exceptional legacy opportunity to create a lively waterfront district that strengthens downtown Ottawa's brand as a preferred regional destination.

A Catalytic Opportunity for Ottawa's Economy



Not only is Ottawa's Downtown Waterfront District at the literal confluence of two important rivers, but it is also at the figurative confluence of compelling Resources, Stakeholder Interests and Market Conditions.



Resources

Ottawa's history, just-far-enough-from-Chicago location, and well-documented reputation as the gateway to Starved Rock Country are critical assets. Moreover, the 35 acre study area can be easily accessed from the downtown street grid, has excellent exposure from the main Starved Rock route and offers extensive riverfront views framed by picturesque Allen Park along the south bank of the Illinois River.

Stakeholder Interests

Business and community leaders, residents, event promoters and boating enthusiasts all recognize the magnetic appeal of the riverfront and are extremely optimistic about the potential.

Market Conditions

Local demographics suggest modest support for a wide variety of everyday business, institutional, recreational and residential uses and recurring seasonal events. By comparison, the robust regional market and current traffic patterns will support attractions like hotels, restaurants, festivals, concerts and water-based recreation.

The study area, notorious for flooding, faces some other daunting environmental and regulatory challenges. Plus, the sheer scale of the waterfront, relative to other downtown and community interests, will require substantial and creative combinations of public and private funds to fully implement over many years- or even generations.

However, as the waterfront district takes shape, its remarkable confluence of resources, markets and stakeholder interests will grow into a distinct - potentially arresting- package of local and regional attractions that will advance Ottawa's compelling get-away reputation. How, then, do we create a multi-dimensional, attractive, distinctive, respectful, barrier-free, healthy and ultimately, sustainable waterfront district that strengthens Downtown Ottawa's brand?

To accomplish its ambitious goal, community leaders should execute a phased strategy that advances the Comprehensive Plan's downtown concepts by pursuing the following actions:

A Special Opportunity

Establish flexible development parcels

Extend Canal and Clinton Streets, re-align Woodward Memorial Drive, and reshape the site (in connection with statutory off-site compensatory storm water storage) to create accessible, right-sized development pads that offer 1300 feet of spectacular frontage along two sides of the park with ample on and off-street parking. Along with the “Jordan block,” these new pads will be ideal settings for a mix of future, market-supported hotel, restaurant, office and multi-family residential developments that can leverage the waterfront proximity and views. Restauranters who crave a downtown riverfront setting will be attracted to two prime sites, one at the south end of Canal Street and the other at the south end of the new festival street. In addition to private development options, the parcel fronting Canal Street extended is an ideal location for a desirable, multi-purpose recreation/library facility.

Build an attraction-packed park

Organized around dominant riverfront, harbor and concert lawn features, the multi-level, 12 acre park is large enough to accommodate an array of exceptional everyday destinations and extraordinary special-occasion attractions.

Residents and visitors of all ages will enjoy the handsomely appointed, 2500 foot Riverwalk, and families will be drawn to the themed children’s play/spray facility, zip-lines and small, protected harbor where they can rent kayaks, paddle boats and electric boats or even board a tour boat to Starved Rock State Park. The indoor/outdoor gardens will attract adults and adult-oriented social events such as weddings, and the transient docks in the protected harbor will give boating enthusiasts improved docks – steps from down destinations. The more adventurous water-lovers will be captivated by the carefully crafted whitewater course that parallels the river’s edge. Concert-goers will find spacious, purpose-built facilities that will readily accommodate the demanding expectations of regionally popular performers and their promoters, and festival organizers will have exceptional options to raise the bar even higher for Ottawa’s special event reputation.

Connect the downtown, park and rivers

Continuing downtown Ottawa’s distinctive tradition, spacious, landscaped, barrier-free walks will parallel the extended streets, and a series of flowing loops, ramps and grand steps will gracefully link the river, the park and the downtown. Two

existing passages under LaSalle Street provide an additional measure of connectivity to important adjacent development, and the adjacent rail right-of-way will provide a fantastic regional bike connection, in the future. The extensive park frontage with on-street parking, adjacent off-street lots and multiple connections to the downtown grid will easily accommodate parking, crowd movement and emergency services for events of any size.

Maintain, program and promote the waterfront

As it takes shape and when complete, City and private sector partners should collaborate to position the downtown waterfront district as the go-to riverfront destination in the market through a high-level of routine maintenance, aggressive seasonal and special events programming, and consistent, targeted communications.

Leverage local funding

The scale of the waterfront demands that City leaders continue to leverage limited taxpayer dollars with federal, state, corporate, developer and private dollars.

2016 Downtown Waterfront Master Plan



Playpedestr

- 1 Amphitheater, Open Lawn & Stage
- 2 Transient Harbor
- 3 New Market Street
- 4 Botanic Gardens & Conservatory
- 5 Riverwalk Promenade
- 6 Islands
- 7 Parking
- 8 Play Area
- 9 River Overlook
- 10 New Mixed Use Development
- 11 Hotel & Mixed Use Development
- 12 Restaurants
- 13 Community Facility

Downtown Waterfront Program Summary

1. Amphitheater, Open Lawn & Stage

for Regional and Local Festivals and Concerts

- 1A. OPEN LAWN: Approx. 3 acres of Open Lawn to accommodate approx. 5,000 TO 10,000 attendees for each regional event. Temporary Priority seating for larger programs.
- 1B STAGE: Approx. 2,400 sf covered and fully functional theatrical/concert stage facility, that can accommodate modern lighting and sound requirements and equipment.
- 1C. SERVICE ACCESS: provided at the end of new Market Street for loading and loadout for Stage

2. A Small Transient Harbor

providing docks for Tour Boats and transient boaters, and access for kayaks with boats

- 2A. Transient Harbor: approximately 1.5 acres in size, with a capacity of approx. 32 to 36 docks for transient boaters
- 2B. Dock for Tour Boats with pedestrian access from the Riverwalk
- 2C. Small Kayak course approx. 700 feet in length.

3. New Market & Canal Streets

Pedestrian oriented streets that create a beautifully defined public edge for the Waterfront Park

- 3A. New Market Street, approx. 1,000 feet in length, provides a grand entrance to the Waterfront, with wide sidewalks for street cafes and some on-street parking. Can be closed to traffic for community events to create a large pedestrian plaza.

- 3B. Grand Entrance to the Waterfront, at the intersection of New Market Street and LaSalle Street

- 3C. Street Termini, paved plazas that anchor the ends of the streets and also provide approx. feet wide car turnarounds

- 3D. Canal Street, approx. in length, defines the west edge of the Waterfront Park, and becomes an address for future community facilities

4. Riverwalk Promenade

that provides pedestrian access to the river's edge and harbor, and connects to the Fox River trail to the east

5. Botanic Gardens & Conservatory

that strengthen Ottawa's brand as a "Blooming City"

- Outdoor seasonal Botanic Gardens, with walking paths, benches and photo opportunity areas and ceremony event space
- Indoor Year round Conservatory with restaurant, shops and event space

6. Play Area for Children

with unique play equipment, potential participatory fountain, and seating for parents

7. Waterfront Parking

- 7A. East Lot: Approx. 75 spaces close to the waterfront amenities, Jordan Block and future restaurants.
- 7B. West Lot: Approx. 160 spaces close to waterfront amenities, Community Center, Botanical Garden & Conservatory, and future restaurants

- On-Street: Approx. 30 on-street spaces on new Market Street, and 16 on Canal Street.

- Structured Parking located on Jordan Block, approx. 300 spaces per level

8. Landscaped Barrier Islands

to protect the Riverwalk Promenade and Harbor free of floating debris and wakes created by passing boats.

9. Riverfront Overlooks

close to the river edge to experience spectacular river views and provide great photo opportunities

10. New Mixed Use Buildings

Mixed use, retail and restaurants along the street with residential above

11. Hotel & Mixed Use Development

Hotel, Banquet Hall, retail, restaurants and structured parking on the former Jordan Block

12. Waterfront Restaurants

Restaurants located near the river's edge with outdoor seating near the water and adjacent parking

13. Community Facility

A single facility could combine different community functions, including a new Library, History Museum, and Recreation Center, and also provide Event Space, Meeting Rooms, Public Bathrooms, relocated YMCA, and locker rooms and showering facilities for boaters staying overnight in the harbor.

See following pages for more details on key plan elements.

Key Plan Elements

1. Amphitheater, Open Lawn & Stage



1A Open Lawn, approx. 3 acres, gently sloping towards the stage, oriented to the southeast to maximize river views and minimize direct sun glare
1B Amphitheater and Stage 1C Access to Stage P Event Parking

1. Amphitheater, Open Lawn & Stage

The Master Plan recommends Ottawa's current festivals move to the new Waterfront Park and that up to five festivals are produced annually between May and October. The current roster of Two Rivers Wine and Jazz Festival (June), Riverfest (August), Oktoberfest (September), and the proposed craft beer festival is good. Technically, there already is a successful Ottawa Craft Beer Fest, but it's in Ottawa, Ontario. A fifth, probably musical genre-driven festival should be considered. The months of May and July are both open. The Craft Beer Fest is likely to take one of these.

With the top two festivals each drawing about 5,000 people over two/three days, the attendance for the Wine & Jazz and Riverfront festivals could double to 10,000 each, even possibly triple to 15,000 over three days with a new facility on the river.

Peak day attendance would be about 50% of the total attendance. That suggests that the park (and parking) needs to be planned for these high visitor loads but not have parking areas that look too big during everyday usage.

The other three festivals could draw 5,000 to 10,000, suggesting that at a new festival ground could expect annual attendance at five Ottawa Festivals to rise to more than 50,000 within three to five years.

New festival grounds can also accommodate concerts. While concert programs have been offered at the high school auditorium and other locales around Ottawa, those have been in less than ideal settings with capacities of fewer than 700.

The Plan recommends a regular program of sponsored low-cost concerts in the park from spring to fall.

Having both a large and small music venue will allow local groups like a high school band or community chorale group to have a space appropriate for their draw as well as a larger space that could be operated

The data in the table suggest that there may be room for an inflatable screen on the lawn in the park and a series of adult- and child-oriented movie festivals in the spring and fall when darkness falls earlier.

See Section 2 for the full market analysis on Festivals and Concerts.



The Waterfront Park will be regionally known as the location of Ottawa's Festivals and Concerts, drawing 5,000 to 10,000 people for each event in the future.

Key Plan Elements

2. A Small Transient Harbor



A small Transient Harbor as a Focal Point for the Waterfront Park and the Riverwalk, approximately 1.5 acres in size.

2. A Small Transient Harbor



The new harbor is a great opportunity to offer visitors ways to get out onto the Illinois and Fox Rivers. This basin of the Illinois River is especially attractive stretching from Marseilles to the east and Starved Rock to the west with numerous side channels and wooded shoreline.

Offering river access at this site will have a positive impact on the other assets on the site as they will benefit the river access programming as they draw people to the park. There is a similar mutually beneficial relationship to the adjacent downtown Ottawa. Overall, the park is also an

excellent location with high visibility as it will be just off Route 71 to Starved Rock and visible from the bridge.

The Master Plan recommends two ways to do this. One, provide docks for tour boats to ply the waters of the Illinois River and two, offer kayak and electric boat rental. The ability to offer docks to transient boaters will be an important bonus – especially for the loopers.

The demand for these docks will peak on summer weekends when boaters are most active. They will be largely vacant for most of the year.

Despite most boat owners' ambitions to get out on the water all of the time, in reality we estimate that as few as 60% of the boats in the area marinas are out at once during the summer weekends. Of those – up to 240 boats – we would estimate that no more than 10%, or 24 boats, would use the temporary docks at once. River boaters who arrived by trailers might use another 4 to 6 dock spaces.

The 300 loopers come primarily in the summer months

and they're reaching this point in the circle in midsummer. We expect that they would need another 4 to 6 dock spaces at peak times. There will have to be a policy decision as to whether they will be allowed to spend the night at these temporary slips.

In total, the peak demand for the temporary slips at this location is estimated to be approx. 36 slots.

See Section 2 for the full market analysis on River Tourism.

The Harbor provides docks for Tour Boats, kayak and boat access, and approximately 24 to 36 docks for transient boaters.

Key Plan Elements

3. New Market Street



Looking west along
Market Street



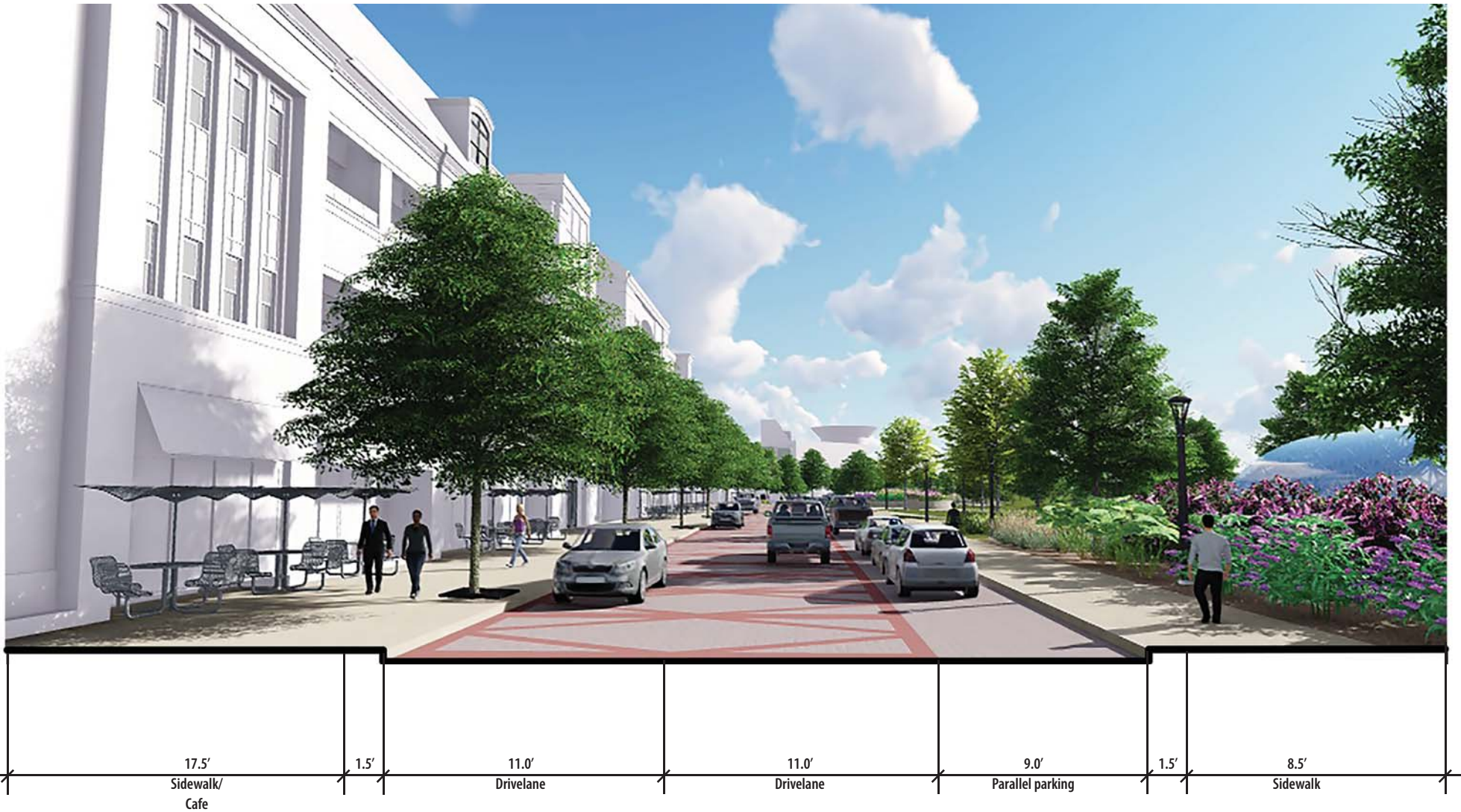
Decorative paving and crosswalks to create a
pedestrian friendly street



New Market Street will be a lively pedestrian oriented street that defines the front door to the Waterfront Park. The street will be lined with restaurants and shops facing the park, and provide wide sidewalks for outdoor seating. The street can be closed to traffic for community events to create a large public plaza.

New Market Street will create an attractive new “Front Door” to the Waterfront, with new restaurants and shops looking out into the park and the river.

3. New Market Street



Proposed Section for New Market Street, the pedestrian-oriented grand “Front Door” to the new Waterfront Park.

Key Plan Elements

3A. Grand Entrance to Waterfront on New Market Street



A Grand Entrance to the Waterfront Park from southbound LaSalle Street, with convenient public parking to the left

3A. Grand Entrance to Waterfront on New Market Street



Decorative paving and crosswalks to ensure that the intersection of Market Street and LaSalle Street is safe and attractive for pedestrians.

Key Plan Elements

4. Riverfront Promenade



A Riverfront Promenade to provide safe pedestrian access to the river's edge, and connect to the larger Fox River Trail system to the east

4. Riverfront Promenade



The Riverfront Promenade and paths in the waterfront park provide critical connections between key elements in the larger Ottawa Trail system, including the following:

- 5. Proposed Riverfront Promenade
- 5A. Existing underbridge connection
- 5B. Proposed Riverwalk connection along Fox River
- 5C. Future connection along Canal Street
- 5D. Existing I & M Canal Trail
- 5E. Existing Fox River Trail
- 5F. Future trails to High School and Harper's Farm



The Riverfront Promenade and paths in the waterfront park provide critical connections between the I & M Canal Trail, Downtown Ottawa and the Fox River Trails.

Key Plan Elements

5. Botanical Garden & Conservatory



5A. Outdoor seasonal Botanic Gardens, with walking paths, benches and photo opportunity areas and ceremony event space

5B. Indoor Year round Conservatory with restaurant, shops and event space



Botanic Gardens & Conservatory that strengthen Ottawa's brand as a "Blooming City"

6. A Fun Play Area for a Family Friendly Waterfront



6. Play Area for Children with unique play equipment, potential participatory fountain, and seating for parents

Transformation of a Catalytic Site



1



2



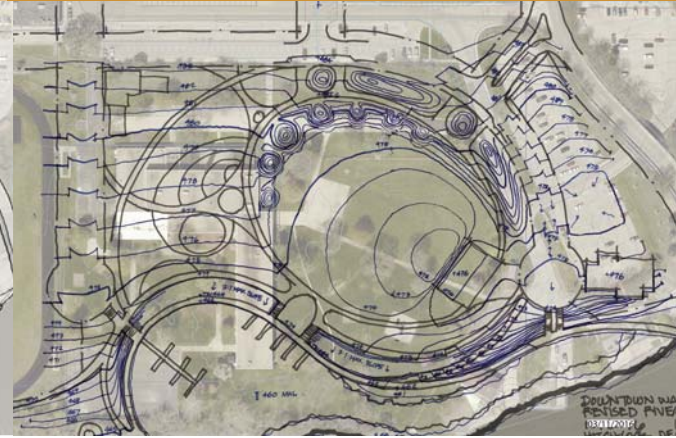
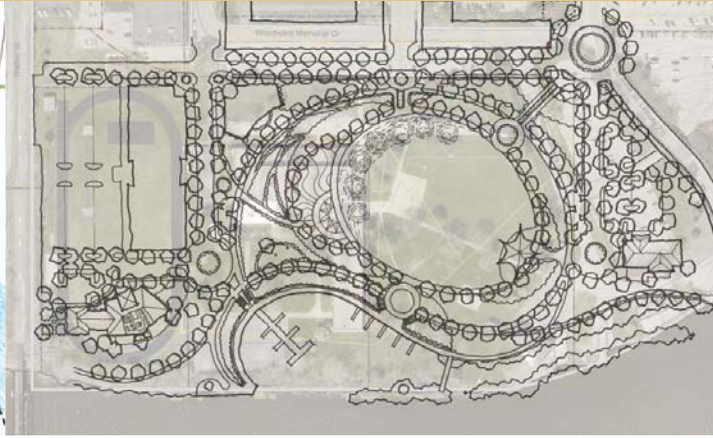
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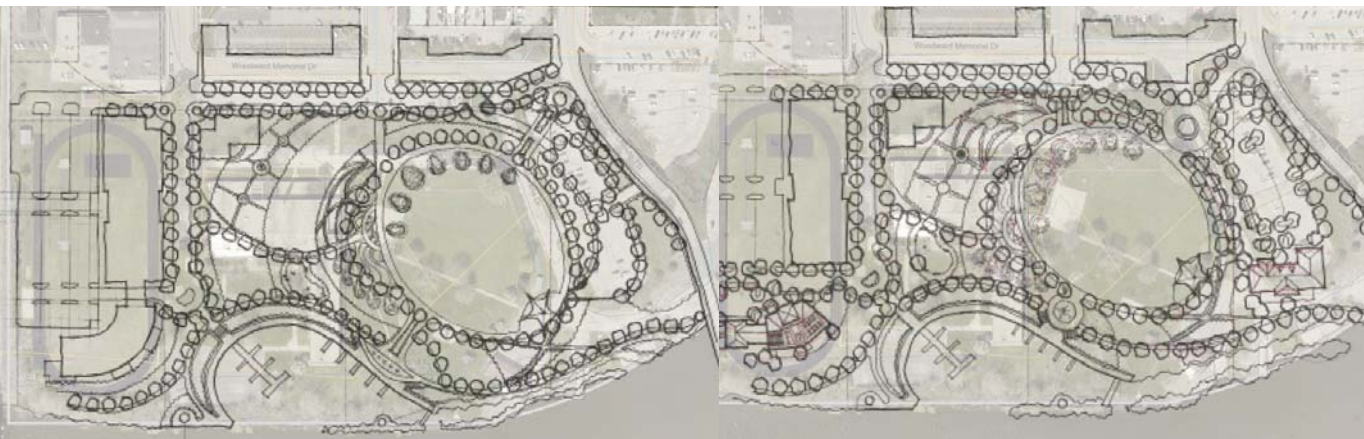
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1 HISTORIC PHOTO OF THE INDUSTRIAL WATERFRONT AREA, CIRCA 1914 2 CENTRAL SCHOOL ON THE WATERFRONT SITE, 2013
 3 COMPREHENSIVE PLAN WATERFRONT CONCEPT, 2016 4 WATERFRONT MASTER PLAN, 2016

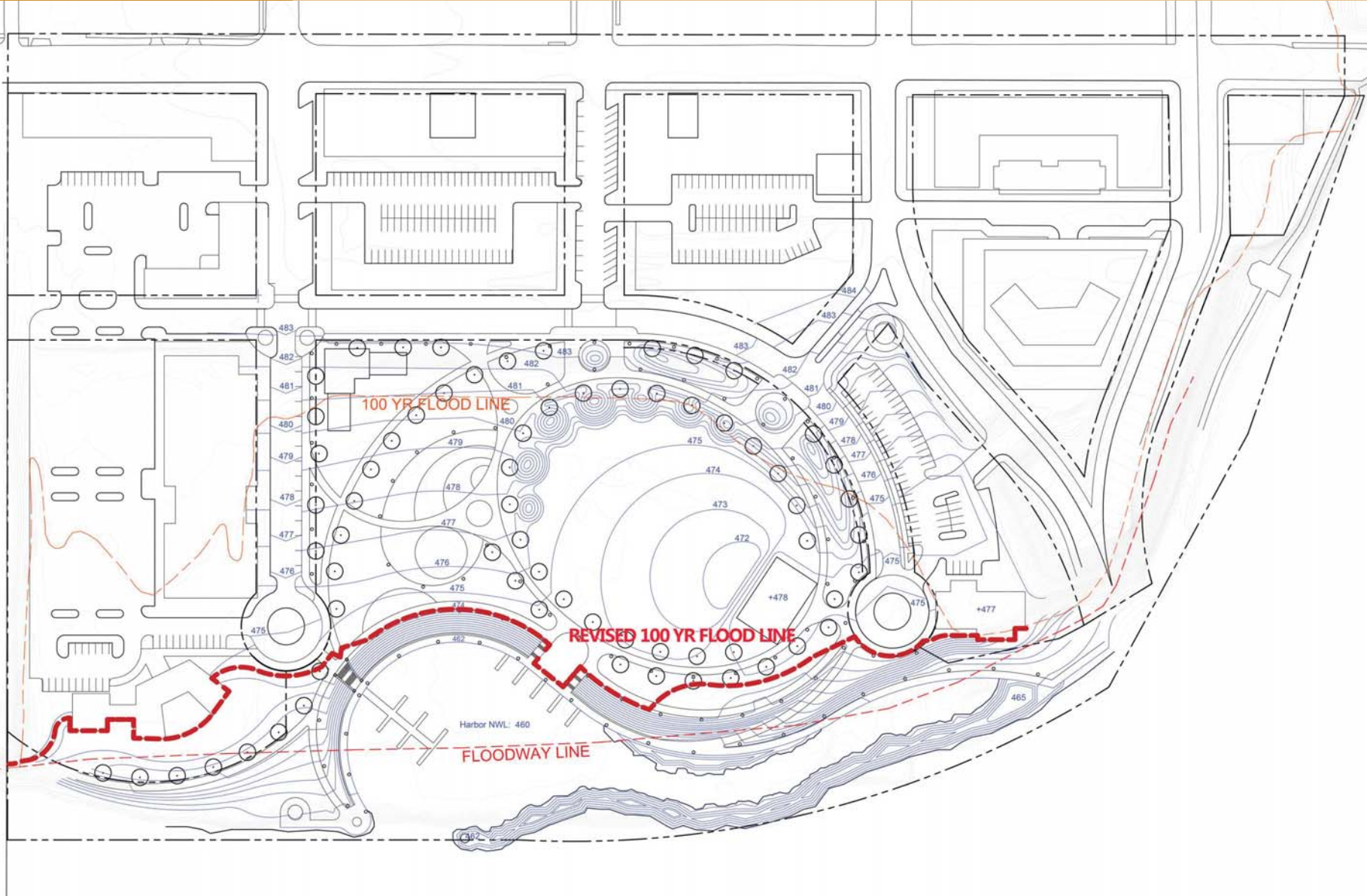
A Plan crafted with the Ottawa Community



Building on the concepts and community feedback from the 2014 Comprehensive Plan, the design team developed and tested many options with City leaders and staff to craft the final 2016 Waterfront Master Plan.



Proposed Grading Plan



Proposed Grading Plan

Existing Grade

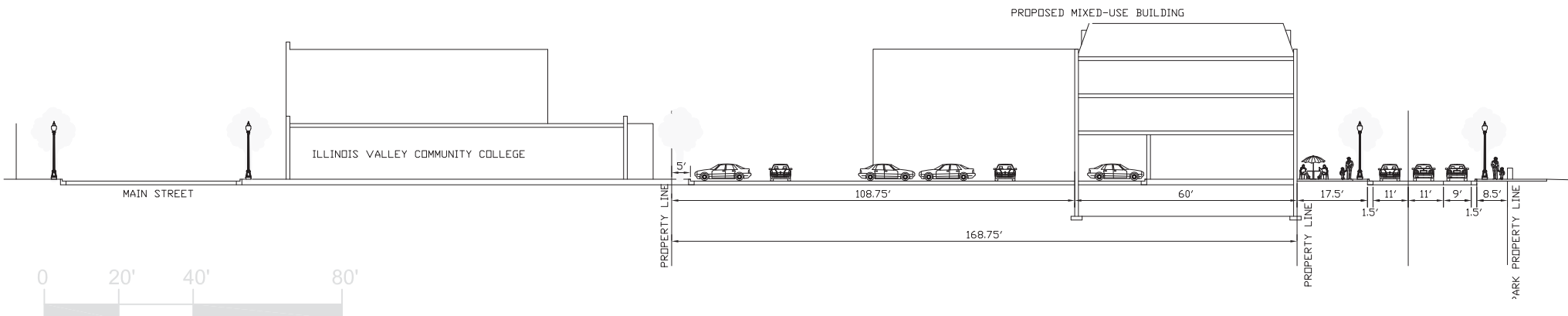
There is approximately 15' of grade change from Woodward Memorial Drive to the top of the riverbank. There is an additional 8' of grade change from the top of the riverbank to normal water level of the river.

Approximately 2/3rds of the current site is within the Illinois and Fox River base flood elevation and the floodway stretches along the entire south edge of the Downtown Waterfront Park.

Proposed Grading

The new Market Street street level is at 483 plus. 100 year flood elevation is currently 474, so all the improvements along this street will be out of the current base flood elevation. Based on discussions with regulatory agencies, the City minimally wants all improvements 3' above the existing base flood elevation.

Compensatory storage would be accommodated by the purchase and excavation of the Harpers Farm property east of the Downtown Waterfront Park, as detailed on the following pages.



Using existing site topography to create a multilevel waterfront destination.

Harper's Farm Potential Regional Compensatory Storage Strategy



1 Amphitheater, Open Lawn & Stage 2 Transient Harbor 3 New Market Street 4 Botanic Gardens 5 Riverwalk Promenade 6 Islands 7 Parking
 9 Play Area 10 Community Facility 10 Overlook 11 New Mixed Use 12 Hotel & Mixed Use Development 13 Restaurants 14 Community Facility

A Regional Compensatory Storage Solution

Harpers Farm

Harper’s Farm is a privately owned, 168 acre parcel located along the Illinois River approximately 1 mile east of the Downtown Waterfront Park site. Harper’s Farm is characterized by a large bluff running east and west along the northern edge and a weedy expanse with invasive volunteer shrubs and trees.

The site affords the opportunity to provide regional, compensatory flood storage needed for the Downtown Waterfront project and beyond, and also provide open space and parks for the public in a restored, natural river environment.

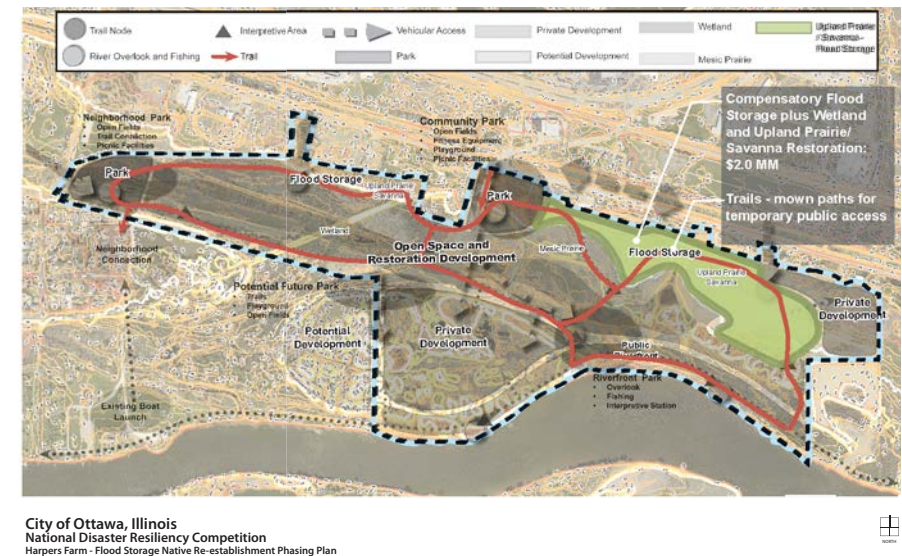
Existing Site Conditions

Approximately 2/3rds of the site sits within the 100 year floodplain of the Illinois and Fox Rivers, 1/4th of the site sits within the Illinois River Floodway, leaving approximately 1/3rd of the site as developable land.

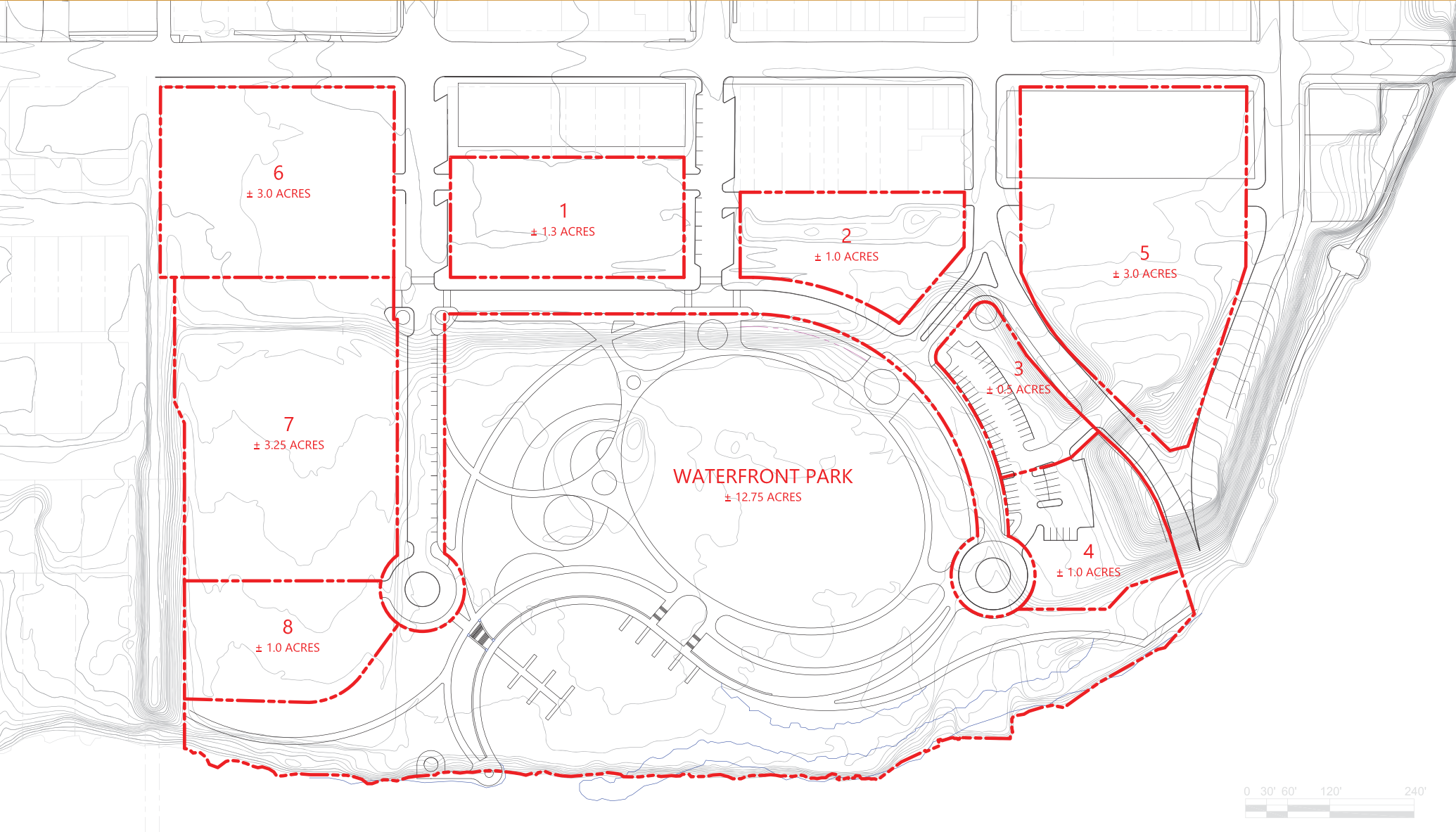
Anticipated Costs

This is a flood storage and native landscape re-establishment project to create new natural asset and compensate for Downtown Waterfront project.

The major cost categories for this project are: soft costs of \$450,000, site grading & earthwork of \$1.2 million, and landscape of \$400,000, and land acquisition costs of \$1.0 to \$1.1 million.



2016 Proposed Parcel Plan



The Proposed Waterfront Park location is right on the river and adjacent to the downtown, and a place ready to receive visitor spending and the resultant economic and fiscal impacts that drive job creation.



Market Analysis

3

The redevelopment of the Ottawa riverfront park with a package of attractive magnetic resident and visitor draws will create a series of market areas around the park defined by drive-times to the park. Some of the new uses in the park will be casual “drop by” uses, while others will be “plan-ahead” experiences that occur on a fixed day or at a date and time. An example would be attending a festival or concert.

MFA defines three market areas for these drop-by and plan-ahead experiences in the riverfront park venues. These are 0 to 15-minute drive-time, 15 to 30-minute drive-time, and 30 to 60-minute drive-time. These can be referred to as primary, secondary, and tertiary market areas. The 0 to 15-minute drive-time area includes all of Ottawa’s population and many of those who live just outside of town and think of themselves as Ottawa residents. A map showing the three market areas is on the Site Details Map on right.

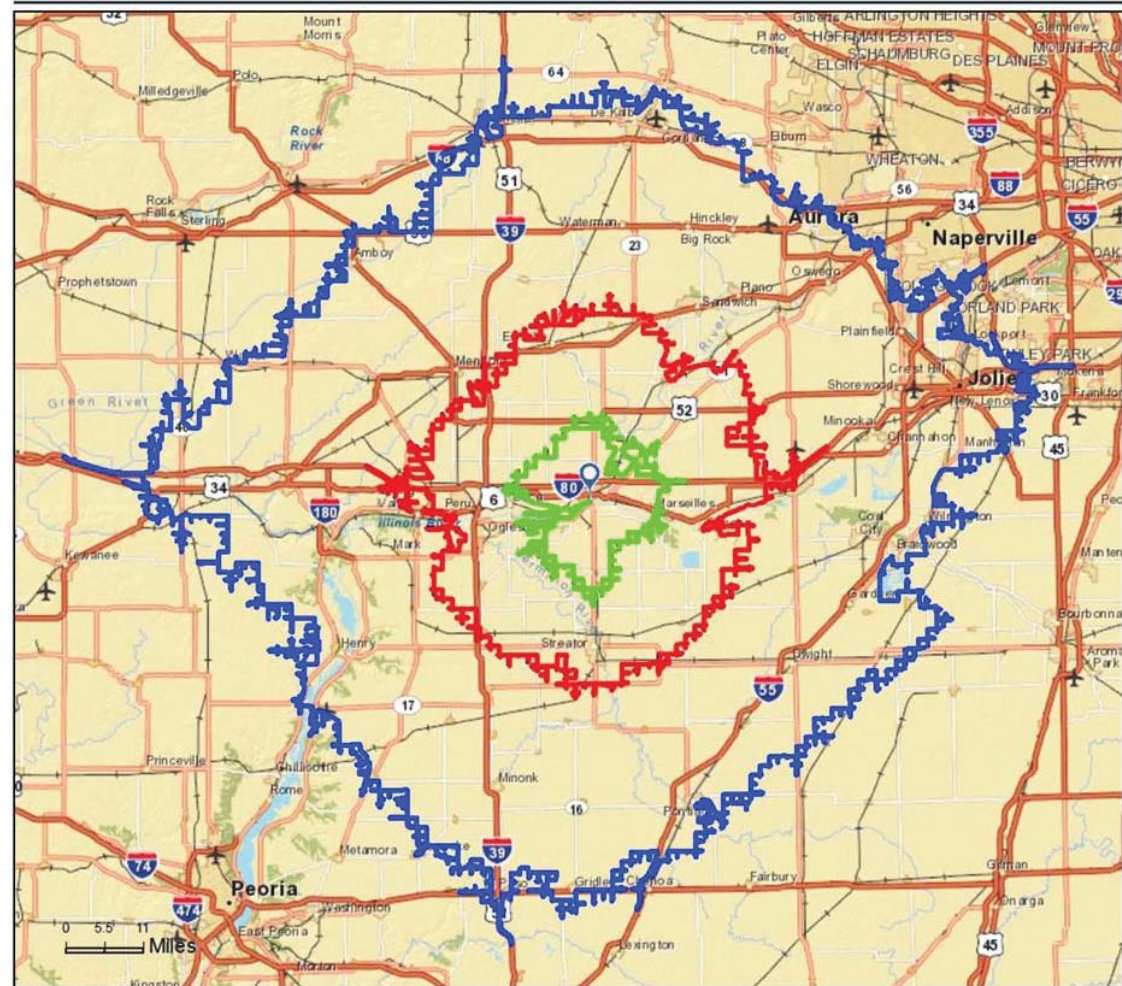
We don’t display a map for a theoretical fourth market area, of greater northern and central Illinois and areas beyond. Some of the festivals that already occur on the subject site have been known to draw people from more than an hours’ drive and several states away. We want to acknowledge this reality but the population of northern and central Illinois and beyond is very large compared to the number of visitors drawn from it. Projecting a reasonable capture rate of it is impractical.



Site Details Map

Ottawa, Illinois, United States 2
 Ottawa, Illinois, United States
 Drive Time Bands: 0-15, 15-30, 30-60 minute radii

Prepared by Esri
 Latitude: 41.34559
 Longitude: -88.84258



The Market Area

The population characteristics of the three drive-time market areas are shown in the table below. These three areas will be referenced repeatedly in this section.

Population & Household in Ottawa Drive-time Markets				
Market Area - Drive-Times around Ottawa	0 to 15 Minutes	15 to 30 Minutes	30 to 60 Minutes	Total
2020 Projections				
Population	28,353	79,073	819,844	927,270
Population 18+	22,204	62,369	603,861	688,434
Population 18 and below	6,149	16,704	215,983	238,836
Percent 18 and below	22%	21%	26%	26%
Households	11,672	31,732	280,699	324,103
Average Household Size	2.43	2.49	2.92	2.86
Median Household Income	\$54,055	\$56,755	\$76,559	
Source: ESRI & MFA				

The 2020 population projection for the 0 to 15-minute market is 28,353; in the 15 to 30-minute area it is 79,000, and in the 30 to 60-minute area it is 820,000. Altogether, the population for the three areas is 927,270.

The number and percentage breakdowns of children and adults in the populations are shown in the table are variations in household size among the three market areas. The age 18 and under cohort is only 22% of the population in the 0 to 15-minute drive-time area. It's even lower – 21% – in the secondary market. Not until the tertiary market of 30 to 60 minutes, does the 18+ population go higher to 26%.

The lower percentage of children in the primary market area population – Ottawa itself – helps explain why the households are smaller in this market area. Households in the primary market area are 2.43 people on average, while in the secondary and tertiary trade areas households have average sizes of 2.49 and 2.92 people respectively.

This is an important advisory that even though there are many children in the primary market area (Ottawa) 78% of them are over 18 years of age. Even in the tertiary area, with more children, 74% of the people are not children. Considering that data indicates that most traveling parties

(from that theoretical fourth market comprising the rest of Illinois and beyond) do not include children, our recommendation is that this new park should offer primarily adult-oriented activities if the intent is to draw visitation from the market areas detailed. Note that this does not mean that plans should exclude children's activities; it simply places children as not the "core" age group to draw.

The table below shows disposable income by household for just the core Ottawa primary market area. It shows the number households and the category of household income by the age of the head of the household.

2015 Disposable Income by Age of Householder for 0 to 15 minute Drive-time around the Riverfront Park Site									
Income Categories	Number of Households by Age of Head of Household								
	<25	25-34	35-44	45-54	55-64	65-74	75+		
Total	358	1,687	1,643	2,249	2,495	1,730	1,593	11,755	100%
<\$15,000	102	226	242	280	435	327	358	1,970	17%
\$15,000-\$24,999	79	244	152	241	334	324	710	2,084	18%
\$25,000-\$34,999	55	257	192	242	273	220	193	1,432	12%
\$35,000-\$49,999	54	321	265	304	365	267	188	1,764	15%
\$50,000-\$74,999	46	359	406	520	511	279	64	2,185	19%
\$75,000-\$99,999	16	145	222	281	292	110	43	1,109	9%
\$100,000-\$149,999	7	114	143	310	223	131	30	958	8%
\$150,000-\$199,999	0	13	14	40	38	42	5	152	1%
\$200,000+	0	7	7	31	24	31	3	103	1%
Percent Distribution	3%	14%	14%	19%	21%	15%	14%	100%	
Median Disposable Income	\$24,710	\$39,180	\$47,791	\$51,775	\$42,240	\$34,672	\$19,500		
Average Disposable Income	\$32,270	\$48,367	\$54,080	\$61,391	\$53,285	\$49,967	\$27,814		
Source: ESRI & MFA									

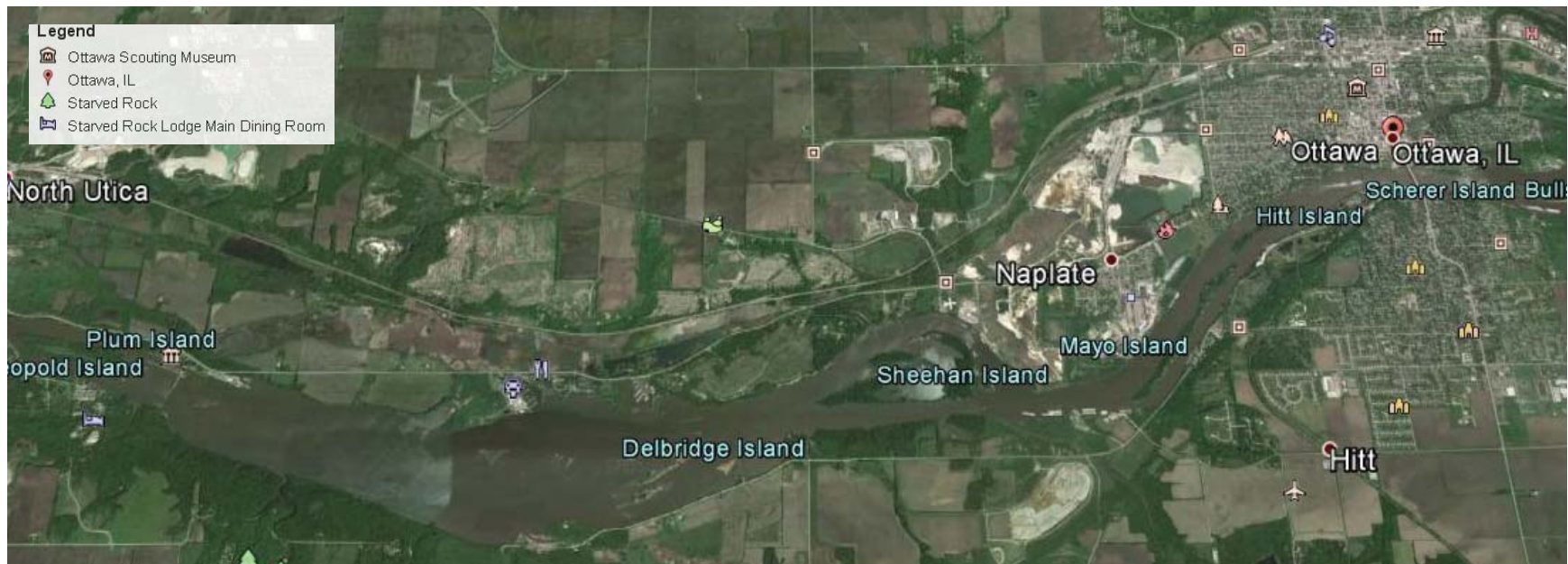
This data reveals that the largest number of households are led by people in the 45 to 54 and 55 to 65 age cohorts (40% together) and that the median and average household disposable incomes (\$51,000 and \$62,000 respectively) peak in the households led by people in the younger of the two, the 45 to 54 age group.

The closeness of the average and median household incomes for each age group suggests that this is not an area with wide income variability across the age cohorts than a bigger spread between the two numbers would suggest.

On the other hand, the shading on the table shows which are the income cohorts with the greatest number of households (the top two are highlighted) for each age cohort. Not surprisingly, the lower income categories are where most of the under 25-year-old headed-households and over 65-year-old headed households are. The \$35k to \$75k are the top categories for households headed by 25 to 44-year-olds. In the 45 to 54 age cohort, there are more in even higher income categories. The number falls in the next age category headed by those ages 55 to 64.

While there are a significant number of households with low household incomes, 17% with disposable incomes of less than \$15,000 a year, the balance of the households in the market area are what is can be termed middle class to upper-middle class. Just 2% of area households have disposable incomes of over \$150,000 a year.

Having reviewed the populations in the market areas, MFA evaluates the proposed project in the sections that follow.



Master Plan Objective: “To create a visitor destination at the Ottawa waterfront that will not only provide enjoyment for residents as well as visitors, but also create and maintain new employment.”

Ottawa’s tourism economy is largely centered on three very different segments:

- 1. A set of interstate highway-driven hotel properties**
- 2. A nationally known center for skydiving**
- 3. A passage to Starved Rock State Park.**

The first two have been extant for years, while the third is a relatively recent development. It takes people to Starved Rock State Park through the hotel cluster by I-80 to downtown Ottawa, across the Illinois River bridge and west along the south side of the Illinois River to Starved Rock State Park.

The award winning promotional campaign driving this business, along with the related sub-regional destination name that was created for the campaign: Starved Rock Country, has brought more tourism to the community than it has enjoyed in the past, but much of it passes, without stopping, right through the community. In this context, the idea of creating a visitor attraction right on the Illinois River in downtown Ottawa by the bridge that carries this Starved Rock bound traffic is an idea worth pursuing.

The Proposed Waterfront Park location is directly on this newly established pathway at a very attractive point – right on the river – and adjacent to the

downtown, a place ready to receive visitor spending and the resultant economic and fiscal impacts that drive job creation. Even with these positives, the package of attractions on the site will need to be visually appealing – even arresting – to draw the attention of passersby who may be focused on the approaching bridge and river.

This Starved Rock visitor flow, from which this visitor attraction will hope to draw, is largely a spring through fall flow. With the exception of guests staying at the Starved Rock Lodge or other unusual nearby lodging (a waterpark hotel), the attraction is an outdoor one. Visitation drops during the winter except for the few hardy visitors drawn to outdoor winter activities like cross country skiing

The visitor flow is also a flow that can be characterized as adult and families. Adults come throughout this nine-month spring to fall stretch, families largely in the summer months.

With this in mind, MFA suggests a nine-month attraction package that includes a family component, but focuses on adults and takes advantage of the site with plenty of river views and access and welcoming pedestrian urban design into the rest of the downtown.

These developments will also have a positive impact on Ottawa’s residential quality of life too for both adults and families.

In time, as Ottawa continues to develop as a tourism community, we recommend the following:

- **Creating a path off of the main one through town to an area known as Harpers Fame as an eco-tourism attraction element with some river frontage,**
- **The development of a set of city blocks along the north side of the riverfront visitor attraction with restaurants (on the ground levels and rooftops), a hotel or guesthouse, shops, residential, and possibly office space,**
- **The redevelopment of the I&M Canal path through Ottawa north of downtown, and**
- **The improvement of a roadways east and west along the north side of the Illinois River leading east to the Heritage Harbor development and west along Ottawa Avenue.**

For now, MFA recommends that the riverfront visitor attraction focus on developing facilities to support four programmatic tourism areas, as discussed in greater detail in the following pages:

1. Festival and concert-driven tourism
2. River tourism
3. Creating a fun spot, and
4. Creating a garden event space

Context and Recommendations

Ottawa has worked for a number of years to develop a yearly summer festival program. In recent years – perhaps in part because of its success with the Starved Rock Country marketing campaign – the festival program has become increasingly successful, despite a festival location that is between the two roads approaching the Illinois River Bridge.

In 2015 the Ottawa Two-Rivers Wine and Jazz Festival drew 4,900 people, primarily from the Chicago area (it was well promoted there). The festival grossed \$161,000 with expenses of \$143,000 (net \$18,000). In 2015 the 17 wineries were joined by a craft beer producer and fresh lobsters flown in from Maine. The festival constrained by where it currently exhibits but promoters believe that it could double in scale with sufficient space.

There are several great lessons to learn from the five-year-old festival Two-Rivers Wine and Jazz Festival:

- **An event like this can draw people from the Chicago area to Ottawa for a two-day festival,**
- **The festival can be profitable – before the economic impacts on the community are counted,**
- **A larger site is needed.**

The decades-old Ottawa Riverfest is a more locally oriented festival that also drew near 5,000 people in 2015. It also ran a small profit with revenue of \$113,000 and expenses of \$102,000.

The third festival in Ottawa in 2015 was Oktoberfest. In its second year it had revenues of \$36,000 with expenses at \$31,000. While not as large as the other two, it is also seen as having growth potential as it is roughly at the level that the Wine and Jazz Festival was at its age.

With Ottawa’s expanding craft beer industry (a small brewery is open, a larger one will open soon, and a third is planned) the addition of an annual craft beer festival is under consideration.

From these points we can draw several conclusions: Ottawa has learned how to stage and promote festivals profitably. While Riverfest has some family oriented elements (a midway with rides) Ottawa’s festivals target adults and do so with higher margin consumer products, a savvy approach.

The economic impact on the community of these festivals is significant although, as yet, uncalculated. The north side hotels are filled and the downtown merchants and restaurants reap an otherwise unanticipated weekend’s worth of business. There are employment and tax benefits as well.

MFA’s recommendation is that the festivals move to new festival grounds in the Ottawa Riverfront Park and that up to five be produced annually between May and October. The current roster of Two Rivers Wine and Jazz Festival (June), Riverfest (August), Oktoberfest (September), and the proposed craft beer festival is good. Technically, there already is a successful Ottawa Craft Beer Fest, but it’s in Ottawa, Ontario. A fifth, probably musical genre-driven festival should be considered. The months of May and July are both open. The Craft Beer Fest is likely to take one of these.

With the top two festivals each drawing about 5,000 people over two/three days, we believe that the attendance for the Wine & Jazz and Riverfront festivals could double to 10,000 each, even possibly triple to 15,000 over three days with a new facility on the river.

Peak day attendance would be about 50% of the total attendance. That suggests that the park (and parking) needs to be planned for these high visitor loads but not have parking areas that look too big during everyday usage.

The other three festivals could draw 5,000 to 10,000, suggesting that at a new festival ground we would expect annual attendance at five Ottawa Festivals to rise to more than 50,000 within three to five years.

1 Festivals and Concerts Demand

We also suggest the development of carefully targeted outdoor events at the festival grounds targeted to narrow niche groups that might draw as few as a thousand for the weekends between the larger fests. Ottawa is just the right size that a group of around a thousand would still make a significant impact on the local tourism industries.

Festival success is not new to the Illinois River Valley. Over 68 years the annual Corn Festival in Morris, Grundy County, 26 miles east on I-80, has grown to an estimated attendance of 30,000. The Burgoo Festival in Utica, LaSalle County, 10 miles west, is now 46 years old and also reports attendance of 30,000.

New festival grounds can also accommodate concerts. While concert programs have been offered at the high school auditorium and other locales around Ottawa, those have been in less than ideal settings with capacities of fewer than 700.

As noted previously, we also recommend a regular program of sponsored low-cost concerts in the park from spring to fall. It is likely that these concerts will primarily appeal to the Illinois River Valley population and the local greater Ottawa population. One-night events typically don't draw from very far and generate fewer overnights than multiday festivals.

Having both a large and small music venue will allow local groups like a high school band or community chorale group to have a space appropriate for their draw as well as a larger space that could be operated like the Arcada Theater in St. Charles where older (B and C list) artists can perform and still appear to be filling an appealing space. In Ottawa, some of these concerts could be timed to match the smaller groups of a thousand that we recommend above.

The table below shows some of the demand statistics for musical performance in three market areas around downtown Ottawa. Note that these charts include population figures for people 18 and over and for 2015, not the same as the 2020 figure presented earlier as the numbers below use the actual behavior of the current population. It is important note that the numbers shown are the number of people who engage in concert going,

Market Area - Drive-Times around Ottawa	0 to 15 Minutes	15 to 30 Minutes	30 to 60 Minutes	Total
2015 Population over 18	22,423	62,460	588,862	673,745
Musical Genre				
Classical Music /Opera	630	1,709	20,813	23,152
Country Music	1,445	4,209	34,808	40,462
Rock Music	2,096	5,516	58,299	65,911
Subtotal	4,171	11,434	113,920	129,525
Percent Participation				
Classical Music /Opera	3%	3%	4%	3%
Country Music	6%	7%	6%	6%
Rock Music	9%	9%	10%	10%
Subtotal	19%	18%	19%	19%

Source: ESRI & MFA

not the number of concerts they go to each year.

Notably, the number of people going to concerts comes close to 20% with attendance at rock concerts (including pop) topping the list, followed by country. We are a little surprised that the two genres of country and rock are not closer. We expected a better showing by country music.

Statistics on the table below show movie theater attendance statistics. Note that these stats are for all ages (not just over 18). Not surprisingly, seeing movies has twice the popularity of going to a concert. There are always movies appealing to all key market segments all year round and movie attendance is typically less expensive.

Market Area - Drive-Times around Ottawa	0 to 15 Minutes	15 to 30 Minutes	30 to 60 Minutes	Total
2015 Population all-ages	28,628	79,537	802,914	911,079
Attended Movie in Last 6 Months				
Total attendees	12,756	35,776	369,362	417,894
Capture of all age groups	45%	45%	46%	46%
Attended Movie in Last 90 Days				
Total attendees	11,535	32,149	338,357	382,041
Capture of all age groups	40%	40%	42%	42%

Source: ESRI & MFA

The data in the table suggest that there may be room for an inflatable screen on the lawn in the park and a series of adult- and child-oriented movie festivals in the spring and fall when darkness falls earlier.

The new harbor is a great opportunity to offer visitors ways to get out onto the Illinois and Fox Rivers. This basin of the Illinois River is especially attractive stretching from Marseilles to the east and Starved Rock to the west with numerous side channels and wooded shoreline.

Offering river access at this site will have a positive impact on the other assets on the site as they will benefit the river access programming as they draw people to the park. There is a similar mutually beneficial relationship to the adjacent downtown Ottawa. Overall, the park is also an excellent location with high visibility as it will be just off Route 71 to Starved Rock and visible from the bridge.

We recommend two ways to do this. One, provide docks for tour boats to ply the waters of the Illinois River and two, offer kayak and electric boat rental. The ability to offer docks to transient boaters will be an important bonus – especially for the loopers.

An operation here will join eight other river and lake tour boat operations in communities in the State of Illinois but outside of Chicago and St. Louis area. With a small tour boat offered at Starved Rock State Park itself, the I&M Canal Boat ride in nearby LaSalle (west), and two marinas offering rental boats nearby but in less visible and accessible sites east and west of downtown, the

result will be that Ottawa will become a tour boat marketplace, known for boat tours and getting on an attractive stretch of the Illinois River.

Meanwhile, a new Riverwalk along the harbor and connecting under the bridge to the Fox River Riverwalk will create an attractive promenade with almost two miles of river edge walk.

These attraction elements will hold appeal for both adults and families from spring through fall foliage rides along the river.

River Tours and Boat Dockage Demand

This category includes both temporary boat docks, tour boats for the river, and an array of rental craft for visitors to explore the river on.

Temporary Use Boat Docks

Temporary boat docks would draw boaters on the river to the park and downtown much as a parking lot does. Boaters tend to like to “go somewhere” on their boats; providing docks close to park activities and food and beverage outlets seems like a natural idea. There are approximately 400

slips in area marinas that would provide home port for river boaters while others take their boats off a trailer. Further, there are a reported 300 (roughly) “loopers” who are on a boat trek on the Illinois River/Mississippi system that, for many, extends across the Great Lakes, into the Eire Canal (or up the St. Lawrence Seaway), all the way to the east coast.

The demand for these docks will peak on summer weekends when boaters are most active. They will be largely vacant for most of the year.

Despite most boat owners’ ambitions to get out on the water all of the time, in reality we estimate that as few as 60% of the boats in the area marinas are out at once during the summer weekends. Of those – up to 240 boats – we would estimate that no more than 10%, or 24 boats, would use the temporary docks at once. River boaters who arrived by trailers might use another 4 to 6 dock spaces (as numerous as these river boaters are, they didn’t drive a boat in just to berth it at a dock).

The 300 loopers come primarily in the summer months and they’re reaching this point in the circle in midsummer. We expect that they would need another 4 to 6 dock spaces at peak times. There will have to be a policy decision as to whether they will be allowed to spend the night at these temporary slips.

2 River Tourism

In total, we estimate that peak demand for the temporary slips at this location would be for 34 to 36 slots.

Recognizing that these slips will not be heavily used outside of peak periods we would defer to a cost analysis to establish how much dock capacity should be provided. Revenue from these docks is akin to parking revenue – it isn't likely to be substantial enough to cover initial capital cost recovery and possibly not enough to cover dock maintenance.

Boat Rentals

The number of boat rental operations across the Midwest is growing as more city riverfronts are being improved. Communities with minimal tourism and rivers smaller than the Illinois now have places where canoes, kayaks, and paddleboards can be rented by local residents as well as visitors.

The Fox River has providers in Elgin, Aurora (two in each of these communities), Geneva, Richmond, Spring Grove, Sugar Grove, Wedron, and Yorkville. Two groups are listed for Ottawa as well (C&M and CanoeTheFox.com).

As the Illinois is a larger river than the Fox, we believe that the rental offerings can be expanded beyond canoes, kayaks and paddleboards to include battery powered Duffy boats (pictured below) and similar small capacity (up to 12) do-it-yourself boats for exploring the river. There are two successful Duffy Boat locations in the midwest including Chicago (Chicago River) and Frankenmuth, MI (Cass River). The 40-year-old company has produced more than 10,000 boats.

Houseboat rental options are also available on the Illinois River but we suggest that this is a specialty item designed to be accommodations as well as a boating experience and therefore less attractive for a leisure oriented waterfront park.



Tour Boats

The Belle of the Rock, shown below, already offers tours from the Starved Rock State Park marina and their own facility nearby on the river. The 49-passenger boat has validated the local market for tour boats for a number of years, but it is our expectation that the area could support additional operators and a larger vessel that would operate from the new park.

Seven tour boats profiled below are a sampling of boats that operate in Midwestern cities. More than 50 tour boat operations do business in Illinois and its adjoining states. Although two of the seven we profile are arguably in cities larger than Ottawa (Rockford and St. Charles, Illinois), we believe in their relevance as they compete with many other leisure time choices than a boat in Ottawa would have to face and we like the similarities of the rivers. It's the same Fox River in St. Charles as it is in Ottawa – just many miles upstream. The other communities that examples are drawn from are: South Haven, MI; North Webster, IN; LaSalle, IL; LaCrosse, WI; and Frankenmuth, MI.

The recommendation for a tour boat comes from MFA's expectation that it is a logical step as Ottawa creates more of a tourist economy. Several of the boats profiled are in small communities that have grown as tourist hubs in recent decades. Four of these seven communities – South Haven, MI; North Webster, IN; LaCrosse, WI; and Frankenmuth, MI – are also arguably tourism communities – especially Frankenmuth. We would not consider Rockford, LaSalle, and St. Charles as communities that have embraced a tourism economic development mission.

The smallest of the example boats is the 49-passenger Rockford boat. The others are 100- to 150-passenger capacity with 150-passenger capacity most typical. The boats run a regular tour schedule most days in-season (generally May to October) but are available for special events like weddings and birthdays as well. Special cruises that include food, wine and beer service run at sunset and seasonally (autumn foliage tours). Basic charges for these tours tend to be, at the low end, at \$5 to \$7.50 at the high end, \$10 to \$15 in the tourism destinations.

The tourism destinations also have the highest annual passenger counts, such as 27,000 to 30,000 in LaCrosse and 50,000 in Frankenmuth. In contrast, the annual passenger count in less tourism oriented cities like Rockford is 7,500 (note that the boat is a third the size of the others); St. Charles is 7,600.

Considering that these boats and others in MFA's midwestern database lead us to believe that a boat with a capacity of 150 in Ottawa could serve 30,000 annually with one boat and 50,000 annually with two boats. The value of two boats is that this can be a very seasonal business and have demand peaks on weekends from June through September that would be amplified in their success if there was available extra capacity at those times.

Having the additional capacity on the 16 summer weekends when demand is high would allow for higher revenues at these peak times due to higher capacity but also more frequent boat trips (possible with two vessels).

In some cases, these vessels are run by Illinois Park Districts and non-profits. We would encourage Ottawa to find a quality private concessionaire to run the operation.

The profiles of the seven cities follow.



River Tourism (contd.)

Forest City Queen, Rockford, IL

The Forest City Queen is operated by the Rockford Park District. A 7.2-mile ride on the scenic Rock River starting at downtown Riverview Park provides a view of stately riverbank homes along with natural beauty. The 45-minute cruise is available to the public daily June to early September plus several weekends in September. Several specialty cruises are offered throughout the season, many of which include lunch and dinner.

Built in 1979, the Forest City Queen carries a maximum of 49 passengers per cruise and about 7,500 passengers a year on public and private cruises. It offers 32 public cruises a week from May to October. Pricing changes annually but is currently at approximately \$5 to \$6 per rider. Some cruises include food and have higher charges.

A new dock at the Nichols Conservatory and Gardens, about three miles north on the river, has increased rideship. In conjunction, the Forest City Queen will offer additional rides and packages that offer discounts for riders who take the boat tour and visit the Conservatory.

Plans are eventually to add an additional dock at Rockford's Riverfront Museum Park and the Burpee Museum of Natural History, both just off the west bank of the river. After that expansion, the Park District will test a plan to broaden a now-small water taxi program it inaugurated recently: An expanded water taxi function throughout the year is envisioned to take people to strategic points along the river's two shores.

Fox River Queen and St. Charles Belle, St. Charles IL

Operating under a contract with the St. Charles Park District, Anderson Enterprises runs public and charter cruises on the Fox River on the River Queen and St. Charles Belle. Each has a capacity of 100 passengers. Cruises from May through mid-October each year board at St. Charles' Pottawatomie Park. Rates for public cruises are:

- Adults: \$7.50 per person
- Children 15 and under: \$6 per person
- Children 2 and under: Free

The cruise takes passengers along the river from a park in St. Charles, a northwest suburb of Chicago, in the Fox River Valley. The four-mile, one-hour trip at a leisurely pace, travels past forest preserve land that was once the domain of



River Tourism (contd.)

the Pottawatomie Indians. The boats are replicas of the steamboats that plied the Fox River a century ago.

In May and from September through mid-October, Fox River cruises are available only on weekends, Memorial Day, and Labor Day. During June, July, August, the boats are available seven days a week, including July 4. An estimated 215 total public cruises take place during the season. An average of 30-40 people takes each cruises, according to operator Anderson Enterprises. The approximate number of people taking public cruises over the season is 7,600.

Charters are a main part of the business for Anderson Enterprises. There is steady business from school picnics in May and June, and summer day camps, birthday parties, and senior, church, and civic groups throughout the summer. Charter groups have the choice of including a catered lunch or dinner with their cruise. Rates for charters are:

Charters are available seven days a week. Estimating an average of 35 people in a charter group and 10 charters a week during the summer months, at least 5000 people take the Fox River charters.

Passengers for both public and charter cruises tend to come to the attraction from neighboring Fox Valley communities such as Geneva and Batavia, surrounding suburban towns such as Aurora, Elgin, and Naperville, from the North Shore suburbs, from Chicago, and from southern Wisconsin.

Charter Rates without Catering			
	Adults	Children	30-passenger Minimum Charge
1 HR	\$7.50	\$6	\$225
1.5HR	\$11.25	\$9	\$337.50
2 HR	\$15	\$12	\$450
3 HR	\$22.50	\$18	\$675
Children's 50-minute Tour			
	\$7.50	\$6	\$180

Offering both a museum experience and cruises on historic replica Great Lake ships, the Michigan Maritime Museum in South Haven is in an expansion mode, and now has five on-water experiences for visitors. Located a 130-mile drive from Chicago along Lake Michigan's shore, the museum is in South Haven on the Black River.

The most comparable boat ride experience to what is proposed for Ottawa is the Lindy Lou, a replica of a 1890s river launch that transported passengers arriving from Illinois and Wisconsin up rivers to summer resorts and locals to picnic grounds. The Lindy Lou makes five trips along the Black River each day, seven days a week, during the season. The cruise duplicates a pleasure ride on a river as it was experienced in the Midwest from the late 1890s through the 1930s.

The Dixie, North Webster IN

North Webster is a small town in Kosciusko County about 80 miles east of Chicago. The Dixie has been cruising the 585-acre Webster Lake since 1929; she is listed on the National Register of Historic Places and is the oldest sternwheeler in Indiana.

The Dixie's history includes serving as a floating grocer, blacksmith and mail carrier for people living around Webster Lake. A series of private owners operated the Dixie from 1929 until 2007. Then, facing a needed restoration, the owners transferred ownership to a nonprofit organization, Dixie Sternwheeler, Inc. which began operating the Dixie in 2008.

With a capacity of 150, the steel-hulled steam wheel paddle boat makes 18 public cruises per week from Memorial Day weekend to Labor Day

weekend. The 75-minute evening (plus Sunday afternoons) cruise around Lake Webster costs \$7 per person and features period music and a narration of the history of the area, the lake, and the Dixie herself.

Passengers are generally tourists from Indiana, Chicago, and other Midwest locations; bus tours bring tourists from farther away. In recent years, the Dixie has carried 12,000 to 15,000 passengers on its public tours. From surveys, the Dixie's operators know that people from 22 counties in Indiana visited the Dixie in 2012, as well as people from 28 different U.S. states and six other countries.

During 2012, the Dixie also carried 94 charter parties, including weddings, retirement home outings, and company and community gatherings.

LaSalle Canal Boat and Lock 16 Center, LaSalle IL

An historical canal boat ride, a boat in a canal pulled by mules is available in nearby LaSalle. The LaSalle Canal Boat and its visitor center preserve the history and experience of the 19th century canal era in Illinois. Proceeds from the café, gift shop, and canal boat ticket sales are used to subsidize school trips to the site and to support the I&M Canal National Heritage Corridor.

With its extensive exhibit on Illinois canal history, the Lock 16 Café, gift shop, and the opportunity to meet the canal boat's "engine" – two mules – the visitor center attracts about 50,000 people annually including individual riders and those in some 89 groups, (including 10 school groups), approximately 10,000 people take the canal boat ride annually.



The LaCrosse Queen, LaCrosse WI

Billed as “more authentic than most Mississippi riverboats,” the LaCrosse Queen is unlike some other Mississippi paddle wheelers which often have a “free wheeling” paddle wheel at the stern for visual effect but use hidden traditional engines as their real means of propulsion. Instead, the LaCrosse Queen uses hydraulic powered diesel engines to turn its paddle wheels, giving a more authentic cruise experience.

The 149-passenger Lacrosse Queen leaves from Riverside Park on the shore of LaCrosse WI. Passengers can view Minnesota on the opposite shore as the Queen cruises into a wildlife refuge, an area of steep bluffs, as well as a trip through the Dresbach Lock and Dam in Minnesota. Wildlife, including eagles, is abundant.

Operated by LaCrosse Queen Cruises, the paddle wheeler takes between 27,000 and 30,000 people on more than 40 Mississippi River cruises, both public and charter, during its season from mid-April through October.

Tickets for the 90-minute public cruises are \$14.95 for adults, \$14.50 for seniors, and \$7.50 for children age 2-11. Several specialty cruises operate throughout the season, including a Sunday brunch cruise costing \$28.95 for adults, \$27.95 for seniors, and \$14 for children. The three-hour lunch cruise is \$33.95 for adults, \$32.95 for seniors, and \$17 for children.

Also available are Friday, Saturday, and Sunday dinner cruises once a month, a Moonlight

Cruise, and a 90-minute Cocktail Cruise with complimentary pizza, beer, and soda. The three-hour Paddlewheel Cruise, available once a week, travels to view one of the oldest railroad swing bridges still in operation.

The LaCrosse Queen is a popular venue for charters for receptions, weddings, reunions, business parties, convention entertainment, and the like. Basic prices for charters are \$1,095 for 80 or fewer people for two hours; for 81 to 149 passengers, the cost is \$1,295. Food and beverage is additional. LaCrosse Queen Cruises, however, often negotiates with charter customers individually. Charters are available seven days a week and take precedence over scheduled public tours.



River Tourism (contd.)



Bavarian Belle Riverboat, Frankenmuth, MI

The Bavarian Belle is a family operated restored Stern Driven paddle wheel riverboat. It offers a one-hour narrated historical tour along the Cass River in the Frankenmuth area. The 150-passenger Bavarian Belle has an open air and canopied upper deck and an enclosed lower deck. When the current owners purchased the Belle in 2000, it refitted the boat for cruises on the Cass River. Today, the Belle serves an estimated 50,000 passengers per season on its public cruises.

The Belle offers one-hour trips seven days a week from early May to mid-October, departing every 90 minutes. Tickets are \$10 for adults and \$4 for children 10 and under. Adult tickets are discounted to \$9 for groups of 20 or more.

One-hour charters are priced at \$850 Monday through Thursday and \$975 on weekends. A charter tour of over one hour is charged the same rate but can be billed in half-hour increments.

The Belle is also available for wedding ceremonies on its upper deck. The cost is \$450. After the ceremony an option is offered for up to 50 guests to ride along on the next scheduled tour of the day (for additional guests, the rate is \$9 per person).



In full view of the passing highway, a cluster of outdoor activities could be offered on Ottawa's water's edge east of the harbor and almost under the bridge.

This cluster could include a carousel (which will become a riverfront landmark lit up at night), mini-golf, a climbing tower with zip lines off the top (possibly running across the river), a destination playground, and a spray pad. The destination playground can be themed on the passing boats. The playground should be large enough to have discreet areas for at least three age groups of children.

A minimum of three elements (playground, mini-golf, etc.) should be planned for as that tends to be the baseline for successfully operating child-oriented packages that draw from farther away than an immediate neighborhood.

This package will benefit resident families and visitor families who will then find boat rides a few steps west. Nearby, small rentable shelters for birthday parties will stimulate a constant flow of young families to the site.

Creating a Garden Event Space

A small formal garden with photo spots for bridal parties would draw a whole new group of visitors to the park. Adding flowers and perennials that will bloom through the spring-fall seasons would add beautiful colors attracting the attention of brides for weddings. A colorful semi-permanent tent (capacity 150 would be about right for this market) with the ability to "dress-up" or down the tent depending on the formality of the wedding would attract weddings and many other types of events.

There are more than 50 of these tent structures across the State of Illinois. Some of them are kept up year-round and have heating and air conditioning. Our recommendation would be to include heating (to take off spring chills) and air conditioning (for the peak of summer weddings). An outdoor gazebo, perhaps near the formal garden, with a view of the river, would be another place for photo opportunities. This entire garden area should be about two to three acres. The formal gardens would also be a perfect spot to host a special event with no more than a few hundred people, allowing for a small quartet or classical ensemble to perform.

The number of unique wedding spots has grown in recent years to the point where some unexpectedly popular locales like zoos reduce

weekend overnight stays for youth groups (night at the zoo) to allow for those facilities to be used for more profitable weddings on weekends. Among the more popular venues that are doing well are weddings in very attractive parks, on the grounds of historic homes, and in farm and vineyard settings. The wedding season, which was once tilted towards spring, now goes all of the way to Christmas with a new popular peak in October.

Our expectation is that from late May to October, two weddings a weekend would be very possible, if the facility is well marketed. This means that 40 to 50 yearly could be reasonably expected. If this figure is daunting, note that more than 28,000 people in nearly 12,000 households live within 15 minutes of the site.

The next page includes profiles of five novel locations – as this would be – that have become successful wedding venues.

If a hotel or guesthouse were to be built north, in the new blocks across the street, the wedding and event programming and the hotel could be mutually supportive.

Eventually, a conservatory could be supported on this site with a tea room allowing for year-round events and programming. The whole floral package would reinforce the idea of Ottawa as a floral/garden city.

Profiles of 5 novel and successful wedding venues

Unusual Illinois Wedding Venues				
Venue Information	Room Count and Capacities	Tents & Outdoor Space	Rental Rate Information	Busiest Time
1 Alto Vineyards 4210 N. Duncan Rd. Champaign, IL 217.356.4784 www.altovineyards.net	5 spaces: Tasting Room (150 max.), Rooftop Vine Deck (50), Pergola (30), Gazebo (20), Screened-in Pavilion w/back deck (60). <i>Option of ceremonies near vines.</i>	No tent. Tasting Room opens onto back patio w/view of vineyards. Rooftop Deck is also off main tasting room with view of property.	The facility fee is \$250/hr. now but they are revamping prices for 2016. There is no caterer on site.	May-Oct.
2 The Farm 21648 Old Farm Ave. Petersburg, IL 217.632.2888 www.visit-thefarm.com	a barn with a tent that can be rented to expand space; weddings only held on Saturdays and only in May-June and September-mid-October. Completely rented through 2016; maximum: 150 people. Ceremonies held in the garden on the pasture.	A barn with tent can be rented.	\$1500, includes tables /chairs. Early access provided Friday for decorating and late access on Sunday for tearing down	May-Oct.
3 The Patrick Haley Mansion 17 S. Center St. Joliet, IL 815.726.6800 www.patrickhaleymansion.com	3 floors. Maximum capacity is 350 people seated.	No tent. Ceremony outside if you'd like, guests also have access to entire grounds (including gardens) but receptions are only held inside.	On-site chef, no outside caterers allowed.	May-Oct. already booking into 2017.
4 Pine Manor Estates 26 Pine Lake Dr. Carbondale, IL 312.884.1689 www.thepinemanor.com	All events are held outside - 250 max. Mansion not large enough to hold wedding reception.	Yes. Ceremony held by lake followed by reception near mansion in tent. Tent has max. capacity of 150 included in rental fee. Additional tent space or sides added for additional cost.	Flat facility fee is \$6650. It covers: use of the facility from 9am day before wedding until Noon the day after, both ceremony and reception, use of Pine Manor estates and 5 bedrooms the night of wedding, tent and lighting, all staff, including 24 hr. event planner (that weekend) and 1 hr. rehearsal	Apr-Oct.
5 Round Barn Centre 1900 Round Barn Rd. West Champaign, IL 217.359.9800 www.roundbarnbanquetcenter.com	400 people maximum; they can use up to 4 rooms; 50 minimum	no outdoors	max room rental rate is \$400; include tables chairs and tablewear; they referred me to website for catering	May-Oct.
Source: Venues and MFA Interviewers				



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The park plans make room for a number of shops and food and beverage outlets. Others can be expected to be opened across from the park. With that in mind, we prepared the following tables.

The first is a leakage analysis that shows that the 204 merchants (second row, retail trade) draw in \$171 million dollars of revenue from the surrounding countryside. Ottawa is a retail hub for its area with sales of \$551million or 45% more than the \$380 million more than would be expected from households living within the same 15-minute drive time. Interestingly, the 15 to 30-minute drive time area also draws in,

in this case, 38% more in retail sales than might be expected. People in the 15 to 30-minute drive time area aren't shopping in Ottawa. Someone else must be. If both areas are running a significant surplus, then where are the sales coming from? The one-word answer is visitors.

Note that in the table below, the red negative numbers are actually a positive. They show that sales are above and beyond what spending by local residents might be. For example, the potential for retail trade and food and drink of \$419 million is exceeded in actual sales by \$172 million in the first line.

What is surprising is that we are not seeing the same bump in food and drink sales. While both of the drive time areas are running a surplus in food and beverage sales, it is well below the retail one. It is 5% over local demand for food and beverage sales versus 45% over local demand for retail sales.

This could suggest that visitors aren't being offered what they want on their travel paths or in tourist-like settings such as by a river. Most of the retailers, at least the larger ones, vie for significant highways and arterial visibility under the assumption that when people see them, they will stop. Except for fast food restaurants, this is less common in the restaurant sector.

With the understanding that all restaurants seek to serve their local markets, we include the data in the two tables (left and next page) for the three market areas established earlier. There are only a few surprises in this data. The first table includes actual expenditure data for non-fast food restaurants area restaurants (in each area).

What we did find especially surprising can be seen in the shaded column of the first table below. This column is called MPI. An MPI of 100 is the national US norm. A 105 in this column shows that the area has 5% higher expenditures than the US norms. Typically, metro areas in the US

Leakage Analysis: Retail Trade, Food & Drink					
Market Area	Demand - Potential Sales	Supply - Actual Sales	Sales Gap	Leakage Surplus	Number of Businesses
0 to 15 Minute Drive-time					
Total Retail Trade and Food & Drink	\$419,447,858	\$592,301,586	-\$172,853,728	41%	310
Total Retail Trade	\$380,280,885	\$551,152,073	-\$170,871,188	45%	204
Total Food & Drink	\$39,166,973	\$41,149,514	-\$1,982,541	5%	106
15 to 30 Minute Drive-time					
Total Retail Trade and Food & Drink	\$1,139,149,761	\$1,540,842,085	-\$401,692,324	35%	764
Total Retail Trade	\$1,031,785,306	\$1,427,039,297	-\$395,253,991	38%	472
Total Food & Drink	\$107,364,455	\$113,802,788	-\$6,438,333	6%	292
Source ESRI & MFA					

Retail, Food and Beverage

run numbers that are all over the 100 norm while rural areas and small cities typically have MPIs lower than the 100 norm. There are many reasons for this. Some have to do with the availability of a variety of good places to eat in small cities

and rural areas. Another reason is that wages in smaller cities and rural areas are lower (as is the general cost of living). For whatever reason, in the Ottawa area, the primary 0 to 15-minute drive time area is holding its own with many MPI numbers at or over 100 – except in the fine dining

categories.

The last table (left) includes a theoretical exercise of “trying out” a number of nationally branded dining establishments on each of the market areas to see how they would do in that market area.

In real life, Ottawa is not likely to generate enough revenues to support a location for many of these branded properties, but it is interesting to note that the Ottawa primary market area holds up pretty well again – scoring close to or over a 100 for many of these brands.

The value this table may hold is that it suggests a number of themed restaurants that might do well with locals but, in the right location, might also appeal to visitors to the area who aren’t spending enough on food here (as the leakage analysis shows).

These are certainly not fine dining establishments (a category that apparently does not do well in Ottawa regardless) but restaurants that look like Texas Roadhouse, Logan’s Roadhouse, Cracker Barrel, Bob Evans, Applebees, Olive Garden, and the Old Country Buffet in locations where they can dip into the resident and visitor markets – like the park – could fare well. The also-rans (IHOP, Red Robin, California Pizza, Carrabas, Cheesecake Factory, & CiCis) are an interesting grouping also.

Resident Based Restaurant Demand by Market Area around Downtown Ottawa									
Restaurant Type	0 to 15 Minute Drive-time			15 to 30 Minute Drive Time			30 to 60 Minute Drive-time		
	Dinners	Percent Capture	MPI	Dinners	Percent Capture	MPI	Dinners	Percent Capture	MPI
Family Restaurant/Steakhouse									
Went in last 6 mo	17,216	76.8%	102	47,842	76.6%	101	465,843	79.1%	105
Went 4+ times/mo	6,689	29.8%	104	18,533	29.7%	103	181,285	30.8%	107
Spent in last 6 months: <\$31	2,030	9.1%	126	5,631	9.0%	125	42,269	7.2%	100
Spent in last 6 months: \$31-50	1,993	8.9%	104	5,389	8.6%	101	51,343	8.7%	102
Spent in last 6 months: \$51-100	3,799	16.9%	113	10,015	16.0%	107	95,738	16.3%	108
Spent in last 6 months: \$101-200	2,771	12.4%	102	7,387	11.8%	97	79,573	13.5%	111
Spent in last 6 months: \$201-300	1,322	5.9%	100	3,897	6.2%	105	37,698	6.4%	108
Spent in last 6 months: \$301+	1,474	6.6%	89	4,228	6.8%	91	50,039	8.5%	115
In Last 6 Months									
Breakfast	3,014	13.4%	107	8,219	13.2%	105	77,868	13.2%	106
Lunch	4,285	19.1%	98	12,029	19.3%	99	116,339	19.8%	102
Dinner	11,680	52.1%	109	31,809	50.9%	107	310,563	52.7%	110
Snack	299	1.3%	76	921	1.5%	84	9,740	1.7%	94
Weekday	7,595	33.9%	107	20,795	33.3%	105	198,554	33.7%	106
Weekend	10,190	45.4%	107	28,262	45.2%	107	273,289	46.4%	110
Fine Dining Restaurant									
Went in last month	2,147	9.6%	82	5,832	9.3%	80	66,526	11.3%	97
Went 3+ times in last month	534	2.4%	73	1,518	2.4%	75	17,355	2.9%	91
Spent in last 6 months: <\$51	501	2.2%	112	1,320	2.1%	106	11,911	2.0%	102
Spent in last 6 months: \$51-\$100	734	3.3%	88	2,108	3.4%	91	22,428	3.8%	102
Spent in last 6 months: \$101-\$200	641	2.9%	79	1,689	2.7%	74	20,077	3.4%	94
Spent in last 6 months: \$201+	544	2.4%	58	1,462	2.3%	56	22,477	3.8%	91

Source: ESRI & MFA

Overall, for the entire park project, we would expect many of the small businesses described in this package would be concession operations supported through a coordinated program of small business loans offered by a local bank with credit enhancement, if possible, by the city.

Theoretical Resident Based Restaurant Demand by Market Area around Downtown Ottawa for National Brands if in Market									
	0 to 15 Minute Drive-time			15 to 30 Minute Drive Time			30 to 60 Minute Drive-time		
	Dinners	Percent Capture	MPI	Dinners	Percent Capture	MPI	Dinners	Percent Capture	MPI
If in Market, Visited in Last 6 Months									
Applebee's	6,489	28.9%	116	18,165	29.1%	117	157,706	26.8%	108
Olive Garden	4,353	19.4%	111	11,563	18.5%	106	119,580	20.3%	116
Red Lobster	3,120	13.9%	110	8,484	13.6%	107	80,835	13.7%	109
Cracker Barrel	2,618	11.7%	120	7,478	12.0%	123	61,951	10.5%	108
Chili's Grill & Bar	2,297	10.2%	84	6,953	11.1%	91	84,894	14.4%	118
Texas Roadhouse	2,233	10.0%	135	6,369	10.2%	138	54,749	9.3%	126
Denny's	2,225	9.9%	105	5,664	9.1%	96	59,224	10.1%	106
IHOP	2,204	9.8%	84	6,092	9.8%	84	76,320	13.0%	111
Outback Steakhouse	2,197	9.8%	99	6,471	10.4%	104	63,865	10.8%	109
Golden Corral	2,090	9.3%	108	6,239	10.0%	116	53,190	9.0%	105
Buffalo Wild Wings	1,797	8.0%	105	5,322	8.5%	112	56,054	9.5%	125
Ruby Tuesday	1,734	7.7%	112	4,807	7.7%	112	42,824	7.3%	106
T.G.I. Friday's	1,603	7.1%	89	4,452	7.1%	89	49,366	8.4%	105
Bob Evans Farms	1,569	7.0%	188	4,035	6.5%	174	23,326	4.0%	106
Red Robin	1,142	5.1%	85	3,211	5.1%	86	42,968	7.3%	122
Waffle House	1,117	5.0%	92	3,478	5.6%	102	33,872	5.8%	106
Logan's Roadhouse	986	4.4%	123	2,962	4.7%	133	22,528	3.8%	107
LongHorn Steakhouse	929	4.1%	96	2,863	4.6%	107	28,701	4.9%	113
CiCi's Pizza	886	4.0%	89	2,838	4.5%	103	28,895	4.9%	111
The Cheesecake Factory	837	3.7%	55	2,605	4.2%	61	40,934	7.0%	102
Old Country Buffet	599	2.7%	127	1,726	2.8%	131	12,227	2.1%	99
Carrabba's Italian Grill	561	2.5%	82	1,582	2.5%	83	21,143	3.6%	117
California Pizza Kitchen	295	1.3%	40	827	1.3%	41	18,393	3.1%	96

Source: ESRI & MFA




Market Conclusion



Next Steps

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Next Steps Initial Phase: Market Street, earthwork & walks

-  1A & 1B NEW MARKET STREET
-  2 EARTHWORK
-  3 WALKS



New Market Street will create an attractive new “Front Door” to the Waterfront, with new restaurants and shops looking out into the park and the river.

In an era of instant everything, this ambitious, long-term strategy may seem overwhelming. Fortunately, citizens and City leaders have already demonstrated a passionate, yet patient commitment to their downtown. Considering the extraordinary waterfront district potential, community leaders should continue their determined (and not always linear) process to adopt and promote the strategy, remediate and entitle the property, recruit developers, fund and construct the improvements, and program the district.

After City leaders adopt the plan, and as they continue to press previous land owners to remediate isolated pockets of contamination, we recommend that leaders follow the Master Plan and accompanying mass grading concept and invest approximately \$3,000,000- \$4,000,000 to construct Phase 1A and 1B of New Market Street. The resulting “U” shaped link will create better circulation to the future park and provide a stable festival platform while establishing and showcasing the new development pads along the northern edge of the district. Then, as leaders secure additional funds, they can complete the balance of the site earthwork, extend the street infrastructure and improve the park.

Near-Term Implementation Steps

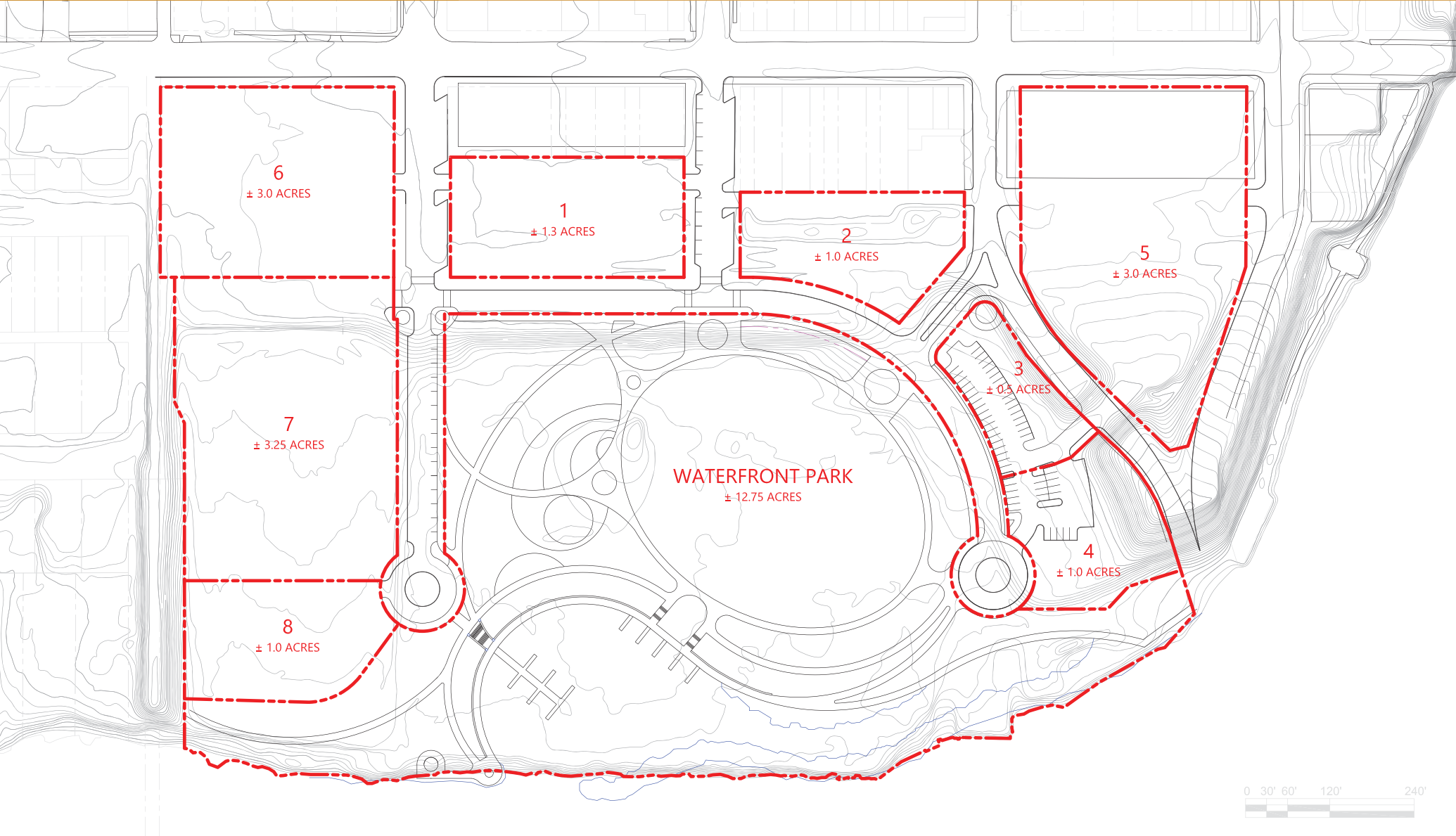
1. **Adopt:** Adopt this plan as the basis for public policy, priority actions and resource allocation.
2. **Entitle:** Plat the streets and zone the resulting parcels to accommodate a mix of creative, market-supported development types.
3. **Construct:** Build Phase 1A, and funding permitting, Phase 1B, of New Market Street to create a front door to the park.
4. **Market & Develop:** Pursue Private Mixed-use Development on Parcel 1 and Parcel 2 to bring restaurants and residents close to the waterfront, and create a vibrant street edge facing the park.

Continue to Pursue Long-Term Strategies

5. **Promote:** Enthusiastically communicate the plan to constituents, and stakeholders.
6. **Remediate:** Aggressively collaborate with regulators and prior owners to clean up contamination.
7. **Recruit:** Actively recruit complementary developers and businesses to invest in the district.
8. **Fund:** Leverage public funds with federal, state and private sector investments.
9. **Program:** Partner with others to operate an engaging variety of seasonal activities and special events.

Near Term Implementation Steps

Next Steps Approve the Plat & Construct New Market Street



Proposed Plat and Parcel Plan

Providing Parking for the Near Term

The Waterfront Park can continue to serve as a great regional and local destination with just Phase 1A and 1B of New Market Street completed. Parking for these interim phases prior to the full Waterfront Park development, include the following options:

Development Parcels 1 and 2

approx. 290 spaces on a surface lot for interim parking prior to being developed.

Development Parcel 5, Jordan Block

approx. 350 spaces on a surface lot for interim parking prior to being developed. When fully developed, structured parking could provide approx. 300 spaces per level.

Parcel 3 & 4

approx. 75 spaces to serve both the Waterfront Park and future restaurant(s) on Parcel 4

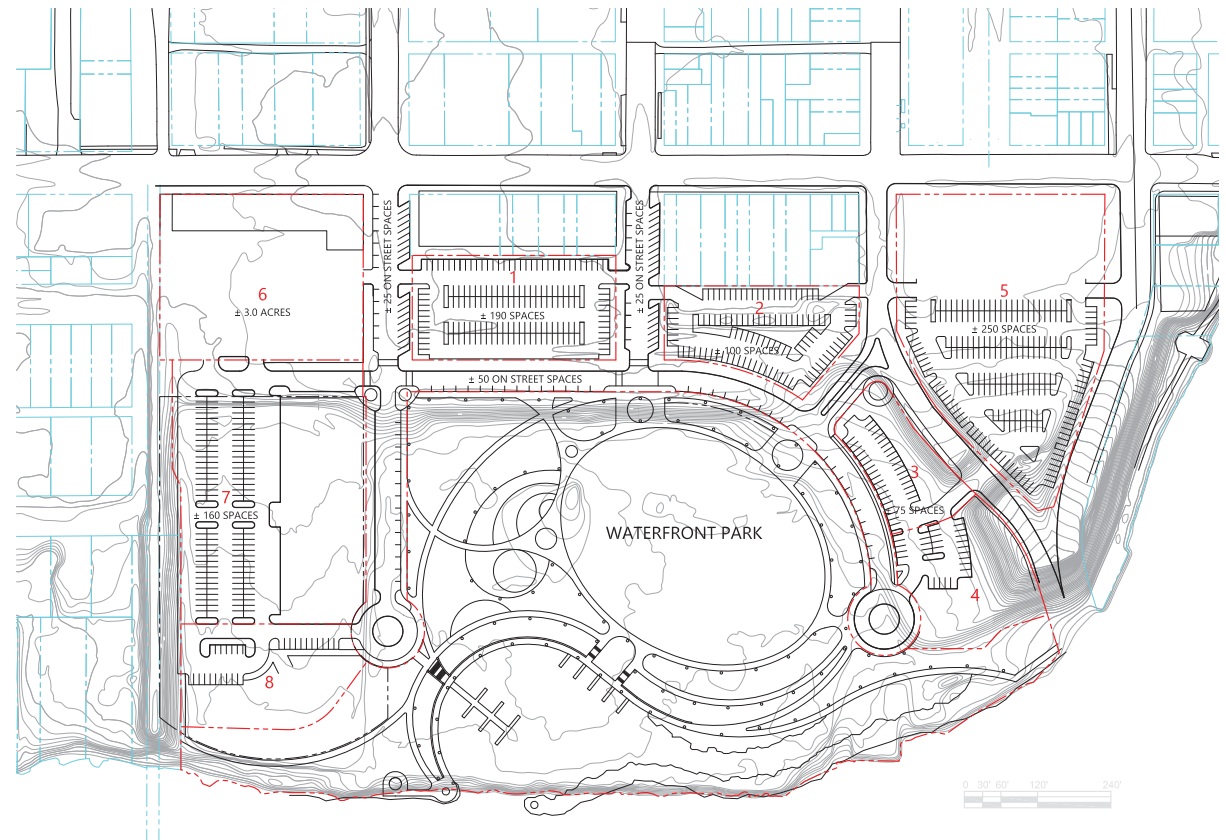
Parcel 7 & 8

approx. 160 spaces to serve both the Waterfront Park and future restaurant(s) on Parcel 8

Total Off-street Parking: approx. 875 spaces

Total On-street Parking: approx. 100 spaces

**TOTAL POTENTIAL INTERIM PARKING:
approx. 975 SPACES**



Over 800 spaces in the near term for the Waterfront

Interim Parking Strategy

	Streets	\$3.3M - \$4.4M
	Earthwork	\$4.7M - \$6.1M
	Walks	\$1.1M - \$1.5M
	Green Infrastructure	\$0.6M - \$0.75M
	Harbor/ Harbor Walk	\$2.3M - \$3.0M
	Other Site Amenities:	\$15.0M - \$20.0M
	Architecture	
	Play Environment	
	Water Course	
	Beach/ Water Feature	
	Landscape	
	Lighting	



Budget Cost Summary

Cost Implications

Hitchcock Design Group estimates that the extensive public infrastructure (including the park improvements and the related acquisition of and compensatory storage improvements at nearby Harper's Farm), will cost between \$34M and \$43M to construct across several decades. Consequently, near-term decisions, like the mass grading and alignment of the road network are critical to long-term success.

Once the basic framework is committed, leaders can capitalize on time and circumstance-sensitive opportunities from grants, to development proposals to leverage every dollar of local funding.

After City leaders adopt the plan, and as they continue to press previous land owners to remediate isolated pockets of contamination, we recommend that leaders follow the Master Plan and accompanying mass grading concept and invest reconstruct a key segment of realigned Woodward Memorial Drive. The resulting “U” shaped link will create better circulation to the future park and provide a stable festival platform while establishing and showcasing the new development pads along the northern edge of the district. Then, as leaders secure additional funds, they can complete the balance of the site earthwork, extend the street infrastructure and improve the park.