Agenda

- Key Outcomes
- Demographics
- Trends
- Market Analysis
- Community Survey
- Level of Service Standards
- Next Steps
- Questions
- Group Exercise
Outcomes
Desired Outcomes

- **Assess and inventory the current athletic field inventory**
- Complete a **competitive athletic field assessment** of the market.
- Determine **current and anticipated demand for athletic fields** as well as current and future supply to meet demands;
- Provide **industry best practices for sports complex development and management**;
- Develop scenarios and recommendations for New Braunfels to **ensure proper site location for a new sports complex**;
- Provide **conceptual cost estimating for capital and operations associated with recommended scenarios**;
- Deliver a **final Sports Complex Feasibility Study** to the New Braunfels Industrial Development Board (4B) incorporating all components of the project
Demographics
What Will New Braunfels Look Like?

- Population increase = 44% within next 15 years

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Census</td>
<td>57,740</td>
</tr>
<tr>
<td>2015 Estimate</td>
<td>68,441</td>
</tr>
<tr>
<td>2020 Projection</td>
<td>78,158</td>
</tr>
<tr>
<td>2025 Projection</td>
<td>88,531</td>
</tr>
<tr>
<td>2030 Projection</td>
<td>98,740</td>
</tr>
</tbody>
</table>
What Will Region Look Like?

- Population increase = 35% within next 15 years
Age segments are equitably distributed and will remain relatively the same over the next 15 years with a very slight aging trend.
What Will The Region Look Like?

- Age segments are equitably distributed and will remain relatively the same over the next 15 years with a very slight aging trend.
What Will New Braunfels Look Like?

### POPULATION BY RACE

- **White Alone**
  - 2010 Census: 86.82%
  - 2015 Estimate: 84.76%
  - 2020 Projection: 83.08%
  - 2025 Projection: 81.89%
  - 2030 Projection: 80.92%

- **Black Alone**
  - 2010 Census: 7.29%
  - 2015 Estimate: 8.13%
  - 2020 Projection: 8.49%
  - 2025 Projection: 8.91%
  - 2030 Projection: 9.22%

- **American Indian**
  - 2010 Census: 2.27%
  - 2015 Estimate: 2.65%
  - 2020 Projection: 2.96%
  - 2025 Projection: 3.18%
  - 2030 Projection: 3.36%

- **Asian**
  - 2010 Census: 2.27%
  - 2015 Estimate: 2.65%
  - 2020 Projection: 2.96%
  - 2025 Projection: 3.18%
  - 2030 Projection: 3.36%

- **Pacific Islander**
  - 2010 Census: 0%
  - 2015 Estimate: 0%
  - 2020 Projection: 0%
  - 2025 Projection: 0%
  - 2030 Projection: 0%

- **Some Other Race**
  - 2010 Census: 0%
  - 2015 Estimate: 0%
  - 2020 Projection: 0%
  - 2025 Projection: 0%
  - 2030 Projection: 0%

- **Two or More Races**
  - 2010 Census: 0%
  - 2015 Estimate: 0%
  - 2020 Projection: 0%
  - 2025 Projection: 0%
  - 2030 Projection: 0%

### HISPANIC POPULATION

- **2010 Census**
  - 35.04%

- **2030 Projection**
  - 42.67%
What Will The Region Look Like?

POPULATION BY RACE

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>White Alone</td>
<td>77.47%</td>
<td>75.54%</td>
<td>74.09%</td>
<td>72.86%</td>
<td>71.85%</td>
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<tr>
<td>Black Alone</td>
<td>3.42%</td>
<td>3.82%</td>
<td>4.15%</td>
<td>4.41%</td>
<td>4.63%</td>
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<tr>
<td>American Indian</td>
<td>8.09%</td>
<td>8.62%</td>
<td>8.73%</td>
<td>9.01%</td>
<td>9.20%</td>
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<tr>
<td>Asian</td>
<td>3.42%</td>
<td>3.82%</td>
<td>4.15%</td>
<td>4.41%</td>
<td>4.63%</td>
</tr>
<tr>
<td>Pacific Islander</td>
<td>8.09%</td>
<td>8.62%</td>
<td>8.73%</td>
<td>9.01%</td>
<td>9.20%</td>
</tr>
<tr>
<td>Some Other Race</td>
<td>2010 CENSUS</td>
<td>2015 ESTIMATE</td>
<td>2020 PROJECTION</td>
<td>2025 PROJECTION</td>
<td>2030 PROJECTION</td>
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<tr>
<td>Two or More Races</td>
<td>3.42%</td>
<td>3.82%</td>
<td>4.15%</td>
<td>4.41%</td>
<td>4.63%</td>
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HISPANIC POPULATION

<table>
<thead>
<tr>
<th>2010 Census</th>
<th>2030 Projection</th>
</tr>
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<tr>
<td>35.14%</td>
<td>41.23%</td>
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Trends
### National Baseball Trends Analysis

<table>
<thead>
<tr>
<th>Baseball</th>
<th>Definition</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year change</th>
<th>5 Year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>15,539</td>
<td>14,429</td>
<td>14,198</td>
<td>13,561</td>
<td>12,976</td>
<td>13,284</td>
<td>2.40%</td>
<td>-1.00%</td>
<td>-3.00%</td>
</tr>
<tr>
<td>Casual</td>
<td>1-12 times</td>
<td>4,674</td>
<td>4,639</td>
<td>4,640</td>
<td>4,212</td>
<td>3,931</td>
<td>4,201</td>
<td>6.90%</td>
<td>0.10%</td>
<td>-1.90%</td>
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<tr>
<td>CORE</td>
<td>13+ times</td>
<td>10,866</td>
<td>9,790</td>
<td>9,558</td>
<td>9,350</td>
<td>9,046</td>
<td>9,083</td>
<td>0.40%</td>
<td>-1.40%</td>
<td>-3.50%</td>
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</table>

- All participation figures are in thousands.

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
# National Football (Tackle) Trends Analysis

## Football - Tackle Trends

<table>
<thead>
<tr>
<th>Football - Tackle</th>
<th>Definition</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year Change</th>
<th>5 Year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>7,816</td>
<td>7,243</td>
<td>6,850</td>
<td>6,448</td>
<td>6,220</td>
<td>6,165</td>
<td>-0.90%</td>
<td>-2.20%</td>
<td>-4.60%</td>
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<tr>
<td>Casual</td>
<td>1-25 times</td>
<td>3,585</td>
<td>3,291</td>
<td>3,060</td>
<td>2,691</td>
<td>2,566</td>
<td>2,601</td>
<td>1.40%</td>
<td>-1.60%</td>
<td>-6.10%</td>
</tr>
<tr>
<td>CORE</td>
<td>26+ times</td>
<td>4,230</td>
<td>3,952</td>
<td>3,790</td>
<td>3,757</td>
<td>3,655</td>
<td>3,564</td>
<td>-2.50%</td>
<td>-2.60%</td>
<td>-3.30%</td>
</tr>
</tbody>
</table>

- All participation figures are in 000s

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
## National Lacrosse Trends Analysis

<table>
<thead>
<tr>
<th>Lacrosse</th>
<th>Definition</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year change</th>
<th>5 year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>1,092</td>
<td>1,162</td>
<td>1,423</td>
<td>1,501</td>
<td>1,607</td>
<td>1,813</td>
<td>12.80%</td>
<td>9.90%</td>
<td>10.80%</td>
</tr>
<tr>
<td>Casual</td>
<td>1-12 times</td>
<td>456</td>
<td>543</td>
<td>637</td>
<td>701</td>
<td>788</td>
<td>914</td>
<td>16.00%</td>
<td>14.20%</td>
<td>15.00%</td>
</tr>
<tr>
<td>CORE</td>
<td>13+ times</td>
<td>637</td>
<td>619</td>
<td>786</td>
<td>800</td>
<td>819</td>
<td>899</td>
<td>9.80%</td>
<td>6.10%</td>
<td>7.60%</td>
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</tbody>
</table>

- All participation figures are in 000s

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
**National Soccer (Outdoor) Trends Analysis**

<table>
<thead>
<tr>
<th>Soccer</th>
<th>Definition</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year change</th>
<th>5 Year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>13,966</td>
<td>13,957</td>
<td>13,883</td>
<td>13,667</td>
<td>12,944</td>
<td>12,726</td>
<td>-1.70%</td>
<td>-3.50%</td>
<td>-1.80%</td>
</tr>
<tr>
<td>Casual</td>
<td>1-25 times</td>
<td>7,542</td>
<td>7,545</td>
<td>7,418</td>
<td>7,314</td>
<td>6,740</td>
<td>6,532</td>
<td>-3.10%</td>
<td>-5.50%</td>
<td>-2.80%</td>
</tr>
<tr>
<td>CORE</td>
<td>26+ times</td>
<td>6,424</td>
<td>6,413</td>
<td>6,466</td>
<td>6,353</td>
<td>6,205</td>
<td>6,194</td>
<td>-0.20%</td>
<td>-1.30%</td>
<td>-0.70%</td>
</tr>
</tbody>
</table>

- All participation figures are in 000s

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
# National Softball (Fast Pitch) Trends Analysis

## Softball (Fast Pitch) Definition

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year Change</th>
<th>5 Year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>2,331</td>
<td>2,476</td>
<td>2,513</td>
<td>2,400</td>
<td>2,624</td>
<td>2,498</td>
<td>-4.80%</td>
<td>2.30%</td>
</tr>
<tr>
<td>Casual</td>
<td>1-25 times</td>
<td>1,055</td>
<td>1,166</td>
<td>1,317</td>
<td>1,235</td>
<td>1,245</td>
<td>1,117</td>
<td>-10.30%</td>
<td>-4.70%</td>
</tr>
<tr>
<td>CORE</td>
<td>26+ times</td>
<td>1,276</td>
<td>1,310</td>
<td>1,197</td>
<td>1,166</td>
<td>1,379</td>
<td>1,381</td>
<td>0.10%</td>
<td>9.20%</td>
</tr>
</tbody>
</table>

- All participation figures are in 000s

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
## National Softball (Slow Pitch) Trends Analysis

<table>
<thead>
<tr>
<th>Softball (Slow Pitch)</th>
<th>Definition</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Change 2012/2013</th>
<th>2 Year change</th>
<th>5 Year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total participation</td>
<td>1+ times</td>
<td>9,660</td>
<td>9,180</td>
<td>8,477</td>
<td>7,809</td>
<td>7,411</td>
<td>6,868</td>
<td>-7.30%</td>
<td>-6.20%</td>
<td>-6.60%</td>
</tr>
<tr>
<td>Casual</td>
<td>1-12 times</td>
<td>3,672</td>
<td>3,659</td>
<td>3,493</td>
<td>3,281</td>
<td>2,825</td>
<td>2,685</td>
<td>-5.00%</td>
<td>-9.40%</td>
<td>-6.00%</td>
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<tr>
<td>CORE</td>
<td>13+ times</td>
<td>5,988</td>
<td>5,522</td>
<td>4,985</td>
<td>4,528</td>
<td>4,586</td>
<td>4,183</td>
<td>-8.80%</td>
<td>-3.80%</td>
<td>-6.80%</td>
</tr>
</tbody>
</table>

- All participation figures are in 000s

**SOURCE:** Sports Fitness Industry Association 2014 Annual Report
Market
# Market Trends – New Braunfels

**Sports and Leisure Market Potential**

<table>
<thead>
<tr>
<th>Product/Consumer Behavior</th>
<th>Expected Number of Adults/HHs</th>
<th>Percent</th>
<th>MPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participated in baseball in last 12 months</td>
<td>2,229</td>
<td>4.4%</td>
<td>98</td>
</tr>
<tr>
<td>Participated in football in last 12 months</td>
<td>2,587</td>
<td>5.1%</td>
<td>102</td>
</tr>
<tr>
<td>Participated in soccer in last 12 months</td>
<td>1,953</td>
<td>3.8%</td>
<td>102</td>
</tr>
<tr>
<td>Participated in softball in last 12 months</td>
<td>1,717</td>
<td>3.4%</td>
<td>99</td>
</tr>
<tr>
<td>Participated in tennis in last 12 months</td>
<td>2,281</td>
<td>4.5%</td>
<td>105</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $1-99</td>
<td>3,176</td>
<td>6.2%</td>
<td>105</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $100-</td>
<td>3,488</td>
<td>6.9%</td>
<td>105</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $250+</td>
<td>4,014</td>
<td>7.9%</td>
<td>113</td>
</tr>
</tbody>
</table>

**SOURCE:** Environmental Systems Research Institute
## Market Trends – The Region

### Sports and Leisure Market Potential

New Braunfels, Texas, United States
Ring: 20 mile radius
Prepared by PROS Consulting

<table>
<thead>
<tr>
<th>Product/Consumer Behavior</th>
<th>Expected Number of Adults/HHs</th>
<th>Percent</th>
<th>MPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participated in baseball in last 12 months</td>
<td>18,514</td>
<td>4.4%</td>
<td>99</td>
</tr>
<tr>
<td>Participated in football in last 12 months</td>
<td>22,119</td>
<td>5.3%</td>
<td>106</td>
</tr>
<tr>
<td>Participated in soccer in last 12 months</td>
<td>16,474</td>
<td>3.9%</td>
<td>105</td>
</tr>
<tr>
<td>Participated in softball in last 12 months</td>
<td>15,262</td>
<td>3.7%</td>
<td>107</td>
</tr>
<tr>
<td>Participated in tennis in last 12 months</td>
<td>18,586</td>
<td>4.5%</td>
<td>105</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $1-99</td>
<td>27,358</td>
<td>6.6%</td>
<td>110</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $100-$249</td>
<td>29,769</td>
<td>7.1%</td>
<td>109</td>
</tr>
<tr>
<td>Spent on sports/rec equip in last 12 months: $250+</td>
<td>32,389</td>
<td>7.8%</td>
<td>111</td>
</tr>
</tbody>
</table>

**SOURCE:** Environmental Systems Research Institute
# Competitor Analysis

## Sports Complex Attractions

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Baseball/Softball Diamond</th>
<th>Soccer Field</th>
<th>Football Field</th>
<th>Basketball Court</th>
<th>Volleyball Court</th>
<th>Tennis Court</th>
<th>Swimming/Wave Pool</th>
<th>Golf Course</th>
<th>Playground</th>
<th>Picnic Area</th>
<th>Pavilion/Gazebo</th>
<th>Concession</th>
<th>Restrooms</th>
<th>Water Fountain</th>
<th>Skate Park</th>
<th>Dog Park</th>
<th>Batting Cage</th>
<th>Indoor Training Facility</th>
<th>Walking Trail</th>
<th>Biking Trail</th>
<th>Fitness Equipment</th>
<th>Free WiFi</th>
</tr>
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<tbody>
<tr>
<td>Weston Soccer Fields</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Huber Ranch</td>
<td>X</td>
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<td>Schertz Soccer Complex</td>
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<tr>
<td>Peyton Fields</td>
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<td>X</td>
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<td>X</td>
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<td>Seguin Little League Complex</td>
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<tr>
<td>Gary Sports Complex</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>South Texas Area Regional (STAR) Soccer Complex</td>
<td>X</td>
<td></td>
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<td></td>
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The Survey

Community Needs

Local Conditions

Best Practices
## 2015 Inventory - Facilities

<table>
<thead>
<tr>
<th>OUTDOOR AMENITIES:</th>
<th>NB Inventory</th>
<th>Other Provider Inventory</th>
<th>Total Inventory</th>
<th>Current Service Level</th>
<th>Recommended Service Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diamond, Baseball (Teen/Adult)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1.00 site per</td>
<td>#DIV/0!</td>
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<tr>
<td>Diamond, Softball/Baseball (Youth)</td>
<td>7.00</td>
<td>8.00</td>
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<td>1.00 field per</td>
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## Local Need for Athletic Fields

<table>
<thead>
<tr>
<th>2015 Inventory - Facilities</th>
<th>2015 Facility Standards</th>
<th>2025 Facility Standards</th>
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<tbody>
<tr>
<td><strong>Recommended Service Levels</strong></td>
<td><strong>Meet Standard/Need Exists</strong></td>
<td><strong>Additional Facilities/Amenities Needed</strong></td>
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<td><strong>OUTDOOR AMENITIES:</strong></td>
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<tr>
<td>Diamond, Baseball (Teen/Adult)</td>
<td>1.00 field per 15,000</td>
<td>Need Exists</td>
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<td>Diamond, /Softball/Baseball (Youth)</td>
<td>1.00 field per 4,000</td>
<td>Need Exists</td>
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<td>Diamond, Softball (Adult)</td>
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<td>Need Exists</td>
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<td>Rectangle Fields (Soccer, Lacrosse, Rugby)</td>
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<td>Need Exists</td>
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<td>Rectangle Fields Football (Youth)</td>
<td>1.00 field per 40,000</td>
<td>Meets Standard</td>
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</table>
Next Steps
Next Steps

- October - Synthesis of Data
- October - Community Survey through end of October
- November – Potential Site Identification
- November - Conceptual Designs
- November - Construction Cost Estimate
- December – Economic Impact Study
- December - Management Structure
- December - Operational Standards
- December - Financial Pro Forma
- January – Final Feasibility Study Report
Questions
1. What sports need to be most accommodated at a New Sports Complex?

2. Would you prefer a New Sports Complex to have natural grass or synthetic turf or a combination?

3. In addition to fields to accommodate sports, what additional amenities should be constructed at New Sports Complex?