



# City of College Station

Market Analysis



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## Executive Summary

To explore the feasibility of a future community recreation center in College Station, TX, a market analysis was conducted. This analysis is one component of the feasibility study, examining potential demand, identifying other service providers in the area, and benchmarking against similar communities.

Some of the key findings are below:

- College Station's Parks and Recreation Department offers very limited indoor recreational opportunities. With the growing community, there will be additional opportunities to expand their offerings if the City provided indoor recreation facilities.
- The student population of College Station makes up approximately 56% of the overall population. The median age of College Station is 23.7 years old, primarily influenced by Texas A&M University. The Texas A&M Rec Sports facility has an estimated 1.2 million visits annually, potentially indicating that a significant portion of their target demographic is already well-served by existing university facilities. While the facility does offer non-affiliate memberships, it is not widely used by the general public (per conversations with TAMU Recreation staff).
- Visitation data of similar facilities indicate that most participants in the area are willing to travel 3-5 miles. This should be considered when identifying and planning any site for maximum utilization.
- Similar provider research indicated that eight similar providers and 30 niche fitness facilities currently serve the greater community of College Station. On the surface, one might assume saturation in the market, however the Community Survey indicates that only 27% of the market is being served by private niche facilities and that there is still substantial market demand for recreational needs in College Station.
- The Needs Assessment Findings (Appendix A) conducted as part of the overall feasibility study shows that recreational needs still exist in College Station. The top needs related to indoor spaces include indoor running/walking tracks (67%), swimming, pools for leisure/play (66%), cardio equipment/free weights (63%), swimming pool for lap swimming (61%), as well as other indoor based recreation spaces like indoor basketball, volleyball, pickleball, meeting rooms, senior center, etc.
- To be competitive and fill market gaps, a new center might focus on offering unique or underserved services, or alternatively, look for synergies with niche facilities to offer a comprehensive range of programs.
- A new center could incorporate or partner with niche fitness programs to broaden its appeal and cater to specific community interests, enhancing its overall marketability.

## Introduction

To understand the potential of a future community recreation center in College Station, TX, the consultant team completed a market analysis. In the context of a feasibility study, a market analysis is an important step that looks at the potential demand for a project, identifies other multi-service and niche providers in the area, and benchmarks against similar communities.

**The analysis can help determine if there is a market and a need for the City of College Station to provide a community recreation center. The market analysis can help determine who the potential users are and what potential amenities should be included in a potential community recreation center. While a market analysis can inform decision-making, it is just one part of the overall feasibility study.**

1. **Demographics:** This task aims to define the potential user base for the recreation center by analyzing demographic data and mobile user behavior in and around College Station. By understanding who lives in the area, their lifestyles, and their recreation habits, we can tailor the center's services to better fit the community's profile. (remove if demographics are pulled to a separate document)
2. **Benchmarking:** Incorporating benchmarking with national standards provided by the National Recreation and Park Association (NRPA), this task will set performance and operational targets for the recreation center. Benchmarking against existing parks, similar municipalities, and recreation metrics ensures that a potential center aims for best-in-class service and facility standards.
3. **Other Multi-service and Niche Providers:** By examining existing service providers, this analysis helps us understand the current landscape of recreational services in College Station and Bryan. This not only aids in identifying gaps in the market that the new center can fill but also highlights opportunities for collaboration and avoiding unnecessary duplication of services.
4. **Indoor Recreation Trends:** The trends analysis focuses on identifying the shifts in recreational preferences and the evolving needs of the community. This insight allows us to anticipate future demands and design the center to be adaptable to changing trends in sports, events, and community services.

## Sample Facility Definitions

The following are sample facility definitions to consider when reviewing this market analysis report.

### Community Centers

1. A place where people from our community can meet for social, educational, or recreational activities.
2. A building or group of buildings for a community's educational and recreational activities.
3. Public locations where members of a community gather for group activities, social support, public information, and other purposes.

### Potential amenities:

- A large multi-purpose activity space for health and wellness activities.
- An arts and crafts room.
- A large meeting room which can be divided into multiple sections.
- Outdoor gathering space.
- A demonstration/warming kitchen / space for food trucks / vending space for other onsite food and beverage sales.
- A reception area for registering for programs and obtaining information.
- Possibly parks and recreation department office space.
- Possibly an area to display art or an Art Gallery.

A community center's main purpose should be to provide opportunities for active living and recreation in a safe, inclusive environment. By creating a positive atmosphere, these facilities become essential to personal health and wellness, thereby reducing reliance on healthcare and other costly social services.

### Recreation Centers

1. Recreation Centers promote an active and healthy community.
2. A multi-sport and activity center designed for enhancing recreation and sport for the local community.
3. A building that is open to the public where classes are held, sports are played, and there are activities available for young and old people.

### Potential amenities:

- Multi-purpose gymnasium (basketball/volleyball/pickleball...) with optional suspended walking track.
- Aquatic facility
- Fitness/Wellness – weight room, cardiovascular equipment, group exercise studios.
- Classrooms - arts and crafts room.
- A reception area for registering for programs and obtaining information.
- Parks and Recreation Department office space.

### Other potential amenities:

- Indoor synthetic turf



- A large meeting room which can be divided into multiple sections.
- Outdoor patio space off the meeting rooms
- A full kitchen / dedicated space for food trucks / vending space for other onsite food and beverage sales
- Before school/after school/summer camp space
- Lawn – green space for play, gathering

A Recreation Center's main purpose should be to provide opportunities for active recreation in a safe, inclusive environment. Potentially hosting team practices, leagues, and tournaments.

## 1.0 Demographics

### Introduction

The demographics information can help inform the intended market audience of a potential community recreation center. The community makeup suggests that the young median age and growing population could be served by facilities that appeal to college students and young adults, while also offering amenities to serve a more family-friendly atmosphere.

### Population

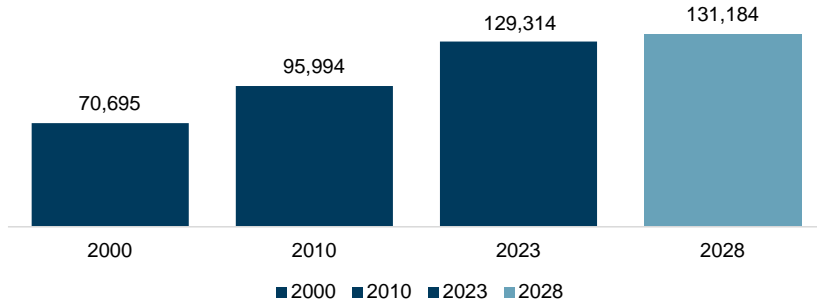
The City of College Station's Parks and Recreation Department is an award-winning agency, offering extensive recreational programs, events, parks, and facilities. The City of College Station is home to Texas A&M University. The collegiate presence is evident in the demographic data – impacting the overall population, median age, household income, and many other factors. The data for this report comes from Esri Business Analyst which provides estimates for 2023 from the 2020 U.S. Census. Population estimates for 2024 were provided by the City of College Station.

College Station's population was estimated at 129,314 residents in 2024 (including college students). This is an approximately a 79% increase from 2000 (70,695 residents). Texas A&M enrollment data from 2023 indicates that the number of students enrolled at the College Station Campus was 71,127.

The student population of College Station makes up approximately 56% of the overall population.

Future projections suggest slight growth over the next five years, with an anticipated population of 131,184 by 2028 (Figure 1.1). The variations in population projections can differ based on many factors including commercial and residential development, for example.

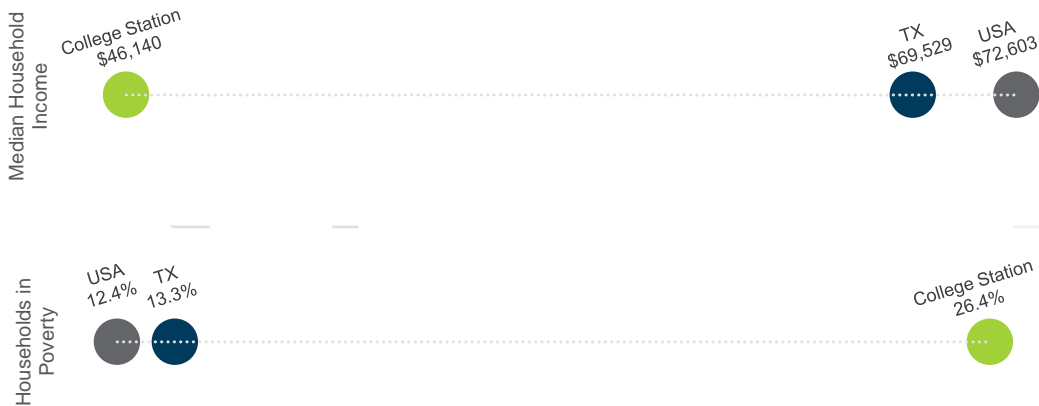
**Figure 1.1: Population Change (2000 to 2028)**



### Household Characteristics

The household characteristics in College Station indicate that the community earns a significantly lower median household income than TX and U.S., with a median household income of \$46,140. Over 26.4% of the population lives below the federal poverty line, more than twice the poverty rates for the State and County – most likely due to a high number of college students in the area.

**Figure 1.2: College Station Household Characteristics (2023)**

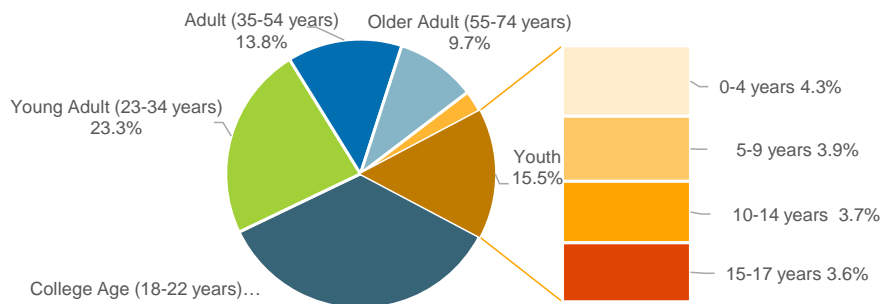


## Age Distribution

The median age of residents in College Station was 23.7 years old in 2023, notably younger to both the median age in TX (35.7) and the median age in the United States (39.1). Again, this demographic makeup is reflective of the collegiate presence.

The age groups making up the largest percentage of College Station's population were college age (18 – 22 years) at 35.1%, young adult (23 – 34 years) at 23.3%, and youth (0 – 17 years) at 15.5%.

**Figure 1.3 College Station Median Age by Block Group (2023)**

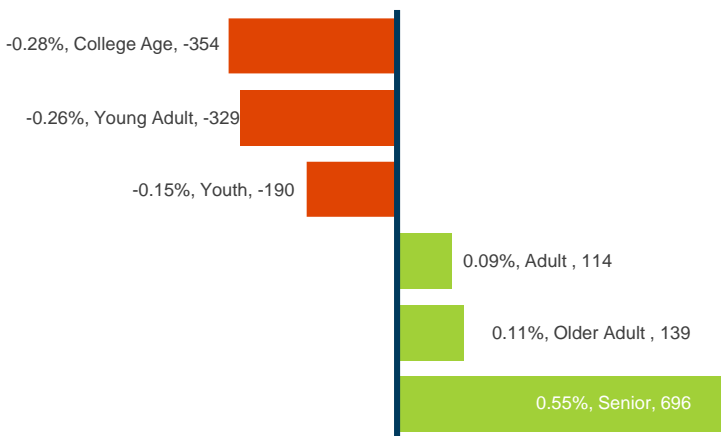




## Age Change Over Time

Over the next four years, the college age, young adult, and youth age groups in College Station are expected to decline slightly (-0.28%, -0.26%, and -0.15% respectively). Conversely, the adult, older adult, and senior groups are expected to see a slight increase, with seniors increasing up to 0.55% growth rate during the same period. Highlighting that although residents ages 0 to 34 years make over 73% of the population, there will be a growing need for increased older adult and senior programming and amenities looking forward.

**Figure 1.4: College Station Projected Age Change (2023)**

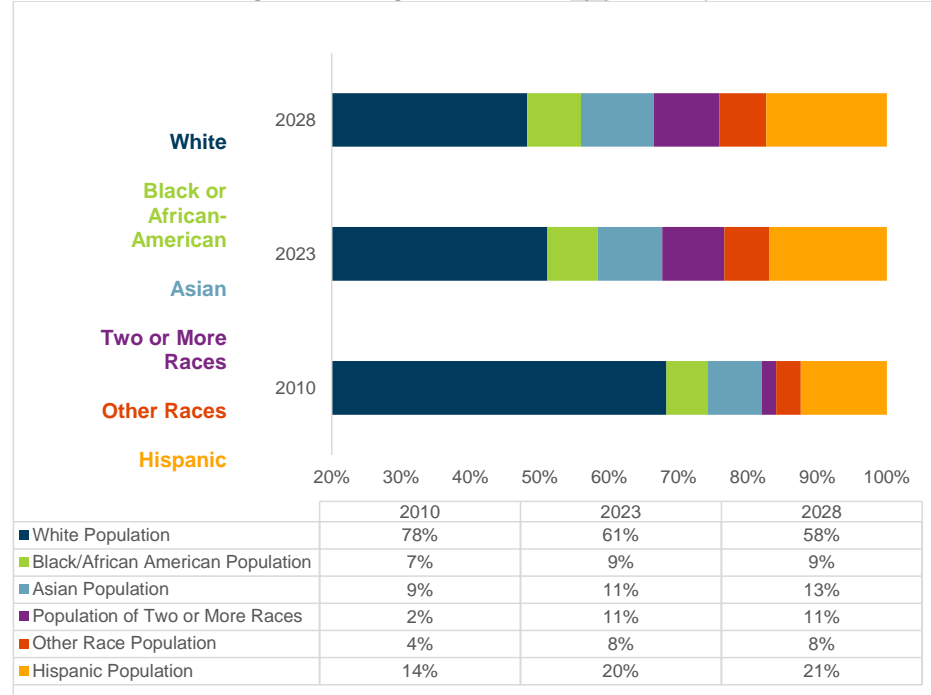


Racial Diversity

College Station became slightly more diverse over time from 2010 – 2023. The white population decreased by 16% while those who identify as two or more races increased by 8%. Those who identify as being of Hispanic origin (regardless of race) is projected to increase from 14% to 21% from 2010 – 2028. Notably, it is expected that the white population will decrease and additional 5% by 2028, while the asian population will increase by 2%.

These demographic shifts highlight the importance of designing a new community center that reflects the cultural diversity of College Station. As the Hispanic and Asian populations grow, the center can offer programs and services tailored to these communities, ensuring broad and inclusive engagement. By addressing the evolving needs and preferences of a diverse population, the center can enhance its relevance, attract more participants, and better serve the entire community.

Figure 1.5: Change in Racial Diversity (2010-2028)



## 2.0 Benchmarking Recreation Facility Operations

As part of the market analysis for the proposed community center in College Station, TX, an assessment of comparable parks and recreation agencies was conducted by the consulting team. Utilizing custom reports from NRPA (National Recreation and Park Association) Park Metrics provided a benchmarking tool for how similar agencies serve their communities through the infrastructure and operations of various recreation facilities.

This assessment provides an overview of these three comparisons with College Station (when applicable) focusing on the following metrics:

- Number of Operated Buildings
- Square Footage of Operated Buildings
- General Indoor Facilities Operations Overview
- Aquatic Facilities Operations Overview

The following descriptions provide details of the criteria used to generate the data for this study.



**Texas:** Median data from parks and recreation agencies in Texas with populations ranging from 100,000 to 150,000 residents. Nine agencies fitting this criteria provided data to NRPA Park Metrics in 2023.



**United States:** Median data from parks and recreation agencies in the United States with populations ranging from 100,000 to 150,000 residents. Forty-seven agencies falling into this criteria provided data to NRPA Park Metrics in 2023.



**College-Centric Communities:** A study of similar individual agencies in college-centric communities. Base data was compiled using NPRA Park Metrics, but follow-up calls and additional research provided information related to their non-affiliate memberships. Each agency uses different definitions for these metrics. Median data from this research served as the third benchmark for this study. These only include parks and recreation agency operated facilities with communities that have universities.

## College-Centric Communities

The following tables detail the similar agencies in college-centric communities. Median data from this research served as the third benchmark for this study. This information points to how the universities differ in their availability of non-affiliate memberships. Texas A&M University provides non-affiliate memberships but the usage is very limited from the general public. The University of Arkansas was the only university that reported that their center is heavily used by the public.

**Table 2.1: College-Centric Communities Benchmark Data**

	State	Population	University	Estimated Enrollment	University Community/ Rec Center	Non-Affiliate Membership	Usage
College Station	TX	126,459	Texas A&M	71,127	Yes	Yes	Limited
Athens	GA	131,086	University of Georgia	41,615	Yes	No	-
Blacksburg	VA	45,147	Virginia Tech	38,000	Yes	No	-
Fayetteville	AR	95,022	University of Arkansas	32,140	Yes	Yes	Heavily used
Fort Collins	CO	168,758	Colorado State University	33,403	Yes	No	-
Knoxville	TN	190,740	University of Tennessee	36,304	Yes	No	-
Lawrence	KS	95,103	University of Kansas	29,355	Yes	No	-
Norman	OK	94,503	University of Oklahoma	28,308	Yes	No	-
Springfield	MO	299,188	Missouri State University	24,224	Yes	Yes	Summer Only
<b>Median</b> *excluding College Station		<b>113,095</b>		<b>32,772</b>			

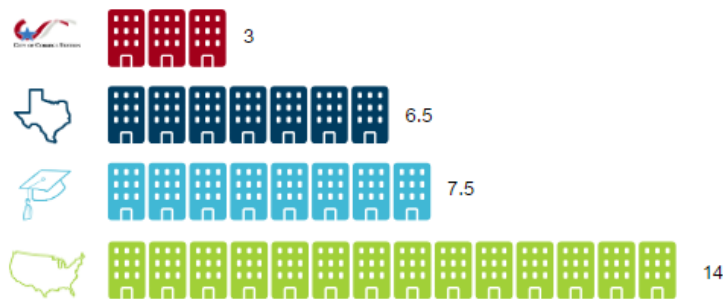
	Recreation Centers	Community Centers	Senior Centers	Aquatics Centers	Competitive Indoor Pools	Indoor Leisure Pools	Indoor Pools Total	Tennis Courts (Indoor)	Pickleball (Indoor)	Multituse Courts- Tennis, Pickleball
College Station	1	1	1	0	0	0	0	0	4	0
Athens	4	2	1	1	0	0	0	0	9	0
Blacksburg	1	1	1	1	1	1	2	0	0	0
Fayetteville	1	0	1	0	0	0	0	0	2	3
Fort Collins	5	7	1	0	3	1	4	0	6	0
Knoxville	1	10	2	0	2	1	3	0	27	0
Lawrence	4	4	0	2	4	1	5	0	12	0
Norman	0	1	1	1	1	1	2	6	14	0
Springfield	7	4	2	2	2	2	4	12	6	0
<b>Median</b> *excluding College Station	<b>2.5</b>	<b>3</b>	<b>1</b>	<b>1</b>	<b>1.5</b>	<b>1</b>	<b>2.5</b>	<b>0</b>	<b>7.5</b>	<b>0</b>

## Number of Operated Buildings

Operated buildings may refer to the recreation centers, community centers, senior or teen centers, indoor aquatics centers or similar.

- **Texas:** Texas agencies with populations ranging from 100,000 to 150,000 residents manage a median of 6.5 buildings, potentially indicating a focused investment in fewer, more centralized facilities that can deliver a wide range of services to the community – or it could point to a state-wide trend where there is reliance on other similar providers to offer recreation facilities or services.
- **College-Centric Communities:** College communities had a median of 7.5 buildings.
- **United States:** The median for agencies in the United States is 14 buildings.

Figure 2.1: Number of Buildings Operated (NRPA Park Metrics, 2023)

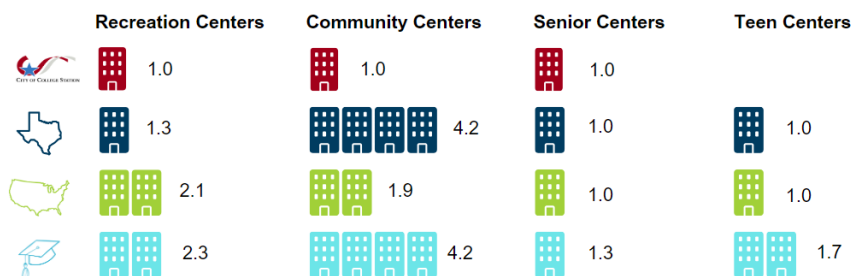


## General Indoor Facilities Operations Overview

- **Recreation Centers:** The data shows that Texas has a median of 1.3 recreation centers, lower than the national median of 2.1 and the college-centric median of 2.3. The interest in recreation centers in areas with a strong university presence indicates that College Station could benefit from enhancing recreational facilities to cater to its diverse population.
- **Community Centers:** The Texas and college communities' median of 4.2 community centers strongly suggests an established demand for such facilities within the state.
- **Senior Centers:** The consistency across Texas and national agencies at one senior center, and college-centric communities at 1.7 for senior centers indicates a shift in more multi-generational facilities rather than senior-specific facilities.
- **Teen Centers:** With teen centers also at a steady median of 1.0 across Texas and the United States, and slightly more prevalent in college communities, there is a movement

to more general facilities that offer specialized spaces rather than standalone buildings for teens.

**Figure 2.2: Number of Facilities Operated by Type (NRPA Park Metrics, 2023)**

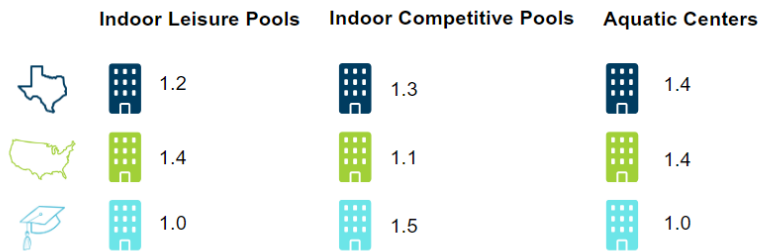


### Aquatic Facilities Operations Overview

- **Indoor Leisure Pools:** Leisure pools, with a median of 1.2 in Texas and 1.4 in both national and college settings, reflect the demand for more aquatic experiences designed for fun, fitness, and family oriented activities.
- **Indoor Competitive Pools:** Competitive swimming pools are slightly more prevalent in college settings, with a median of 1.5, suggesting that areas with younger populations are supported with facilities for structured, competitive aquatic activities. College Station, with its significant student population, could benefit from such facilities to support local and regional swimming competitions.
- **Indoor Aquatics Centers:** The data underscores the importance of aquatic centers, with Texas and national agencies typically offering around 1.4 centers. This standard is indicative of the broad appeal of aquatic activities and their role in promoting community health and wellness.

College Station has two outdoor pools and two splashpads, which are not directly comparable to the aquatics information available through NPRA Park Metrics.

**Figure 2.3: Average Number of Aquatic Facilities Operated by Type (NRPA Park Metrics, 2023)**



### Benchmarking Summary

The data provided from NRPA Park Metrics from the various comparisons in Texas, the United States, and College-centric communities offer most relevant key findings:

- Community centers are most prevalent in college-centric communities and in Texas.
- College-centric communities offer a higher number of indoor leisure and competitive pools.

Considering the City's unique demographic as a college town, emulating the strategies of college communities could be beneficial. For instance, providing more buildings of a larger size could allow for a greater variety of specialized spaces catering to different interests and age groups.

Given the student population in College Station, there may be a need for more expansive facilities that can accommodate a wider range of activities, from recreational sports for youth and young people to large community events for non-collegiate citizens.

On the other hand, if College Station were to only utilize the data from median agencies of similar population in Texas and the United States, it would miss the key data points of what college-centric communities around the country typically provide, potentially underserving the College Station community.

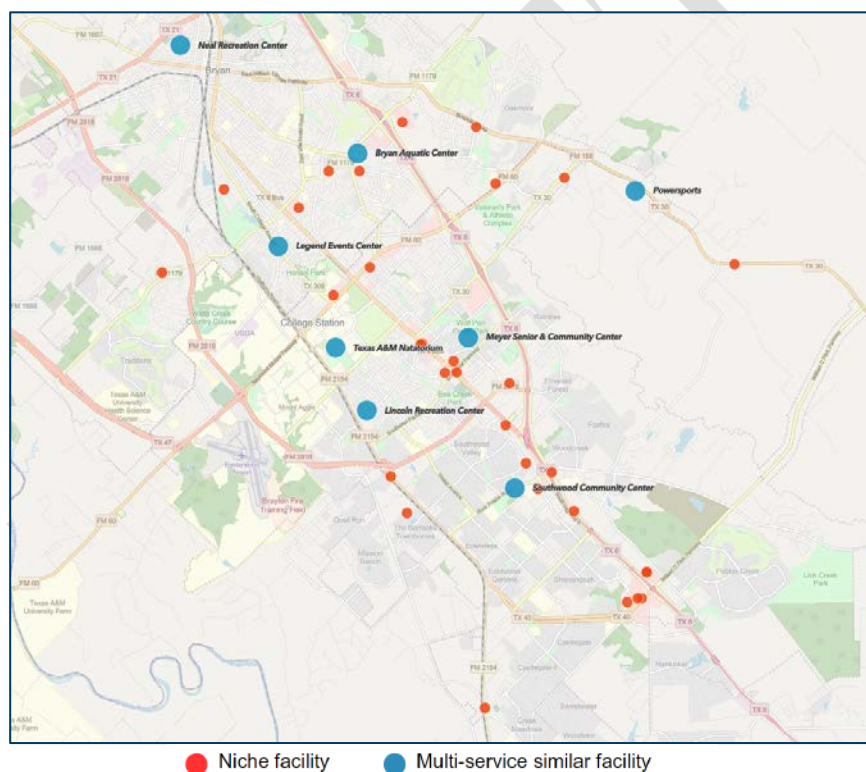
Balancing the number of buildings with the available square footage, and considering the specific use cases for each facility will be key to a center's long-term success and sustainability. Depending on the amenities in a recreation facility, the square footage will vary. The design team will recommend the appropriate square footage and mix of potential amenities for a potential community recreation center based on the entirety of the feasibility study.



### 3.0 Multi-service and Niche Facilities

To explore the feasibility of a new recreation center in College Station, a key step was to identify similar providers. For this process, multi-service facilities and niche fitness facilities were researched in College Station and the City of Bryan. This result ended with identification of eight similar providers (blue), and 30 niche fitness facilities (red), both of which are mapped in the map below. Mapping these facilities provides a visual representation of the market saturation and geographical distribution, assisting in the strategic placement of a new facility.

**Figure 3.1: Multi-service and Niche Facilities**



## Multi-service Facilities

The type of facility that College Station is considering is a community recreation center; these facilities offer a broad range of services such as fitness programs, recreational sports, meeting spaces, courts, among others. They often host community events and offer lifelong recreational programs. These amenities and services make them valuable comparisons when researching potential locations, programs, fees, and amenities for a new facility.

**Table 3.1: Multi-Service Facilities**

Similar Facilities	Street Address	City
<b>Bryan Aquatic Center</b>	3100 Oak Ridge Dr.	Bryan
<b>Legends Event Center</b>	2533 Midtown Pk Blvd	Bryan
<b>Lincoln Recreation Center*</b>	1000 Eleanor St	College Station
<b>Meyer Senior and Community Center*</b>	2275 Dartmouth St	College Station
<b>Neal Recreation Center</b>	600 North Randolph	Bryan
<b>Powersports</b>	10810 SH 30 Suite A	College Station
<b>Southwood Community Center*</b>	1520 Rock Prairie Rd	College Station
<b>Texas A&amp;M Student Recreation Center</b>	Texas A&M University 202 Student Rec Center	College Station

\*City of College Station facility

## Other Niche Fitness Facilities

Thirty niche fitness facilities identified in the analysis are specialized centers that focus on specific types of fitness or wellness activities. These are likely not an exhaustive list of all facilities in the area, although they do reflect a wide variety of niche services such as yoga studios, CrossFit gyms, or barre classes, which cater to a dedicated client base looking for particular types of fitness experiences. They are generally smaller and may offer progression programs that lead participants from introductory to advanced levels. Niche facilities can serve as potential partners or feeders into broader programs at larger community recreation centers. Niche facilities can also benefit by partnering with larger community recreation centers that offer beginner programs which could result in additional business opportunities for niche facilities.

**Table 3.2: Other Niche Fitness Facility Locations**

Niche Facilities	Street Address	City
<b>Anytime Fitness</b>	4421 State Highway 6 400	College Station
<b>Anytime Fitness CSTAT</b>	404 University Drive East	College Station
<b>BCS Swim School</b>	2413 Harvey Mitchell Parkway S	College Station
<b>Body20 Aggieland</b>	937 William D Fitch Pkwy	College Station
<b>BoomFit College Station CrossFit</b>	3200 Longmire Dr.	College Station
<b>BoomFit University</b>	3121 University Drive	Bryant
<b>Brazos Valley Barbell, LLC</b>	4421 Hwy 6 Suite 400	College Station
<b>College Station Fit Body Boot Camp</b>	4075 St. Hwy 6	College Station
<b>CrossFit Aggieland</b>	3815 General Pkwy	College Station
<b>CrossFit Obey</b>	408 W Carson St	Bryan
<b>F45 Training</b>	1904 Texas Ave S	College Station
<b>Gold's Gym</b>	3125 S Texas Ave	Bryan
<b>Gold's Gym</b>	1285 Arrington Rd	College Station
<b>Gold's Gym</b>	200 Brentwood Dr. E	College Station
<b>HOTWORX College Station</b>	1902 Texas Ave. South	College Station
<b>Innovative Fitness</b>	3024 Texas Ave S	College Station
<b>Lions Pride Sports</b>	1910 Greenfield Plaza	Bryan
<b>Orangetheory</b>	1025 University Dr.	College Station
<b>Orangetheory</b>	11655 Wellborn Rd	College Station
<b>Planet Fitness</b>	1673 Briarcrest Dr. Ste 100A	Bryan
<b>Planet Fitness</b>	2501B Texas Ave S.	College Station

Niche Facilities	Street Address	City
Pure Barre College Station	915 William D Fitch Pkwy	College Station
Row House College Station	4001 Texas 6 Frontage Road	College Station
Sawed-Off CrossFit	4000 Harvey Rd	College Station
Snap Fitness	4282 Boonville Rd #130	Bryan
Tru Fit Athletic Clubs	1900 W Villa Maria Rd	Bryan
Tru Fit Athletic Clubs	2412 Texas Ave S	College Station
Tru Fit Athletic Clubs-Longmire	3526 Longmire Dr.	College Station
Tru Fit Athletic Clubs-Wildflower	3155 Wildflower Dr.	Bryan
Wellborn CrossFit	14999 Farm to Market Rd 2154	College Station
Windy Sport and Fitness	12700 SH 30 #201	College Station

### Multi-service Amenities and Facilities

The following matrix shows the types of facilities and amenities available at multi-service facilities in the area. Lincoln Recreation Center, Southwood Community Center, and Meyer Senior and Community Center are existing City of College Station facilities. Based on this matrix, spaces for indoor cycling/spin classes, walking tracks, and recreational pools are potential opportunities to fill a gap.

**Table 3.3: Matrix of Similar Facilities, Amenities, and Programming**

Facility	Bryan Aquatic Center	Legends Events Center	Lincoln Recreation Center*	Meyer Senior and Community Center*	Neal Recreation Center	Powersports	Southwood Community Center*
Classrooms				•			•
Competitive/Lap Pool	•						
Cycling ("spin" Classes)							
Esports		•					
Gymnasium		•	•		•	•	
Indoor Walking Track							
Most Fitness Classes Included			•	•	•	•	•
Multi-purpose Meeting Space		•	•	•	•	•	•
On-Site Child Care, Program/Child Watch			•		•	•	•
Playground					•		
Recreation Pool	•						
Sauna/Steam Room							
Specialty Fitness		•		•		•	•
Splash Pads/Slides/Family-friendly					•		
Sports Training	•	•	•			•	•
Teaching Kitchen							
Weight Room/Cardio Room			•				
Whirlpools/Hot Tubs							

\*City of College Station facility



## Multi-service and Niche Facilities Visitation Analysis

Placer.ai is a location analytics platform that utilizes anonymous and aggregated data to provide insights into visitor behaviors and patterns. This platform can assist agencies in making data-driven decisions by offering a variety of insights into who visitors are and how/when facilities are being used. College Station can use the Placer.ai data from similar providers to understand what potential visitors may want from a new facility.

### Visitation Trends

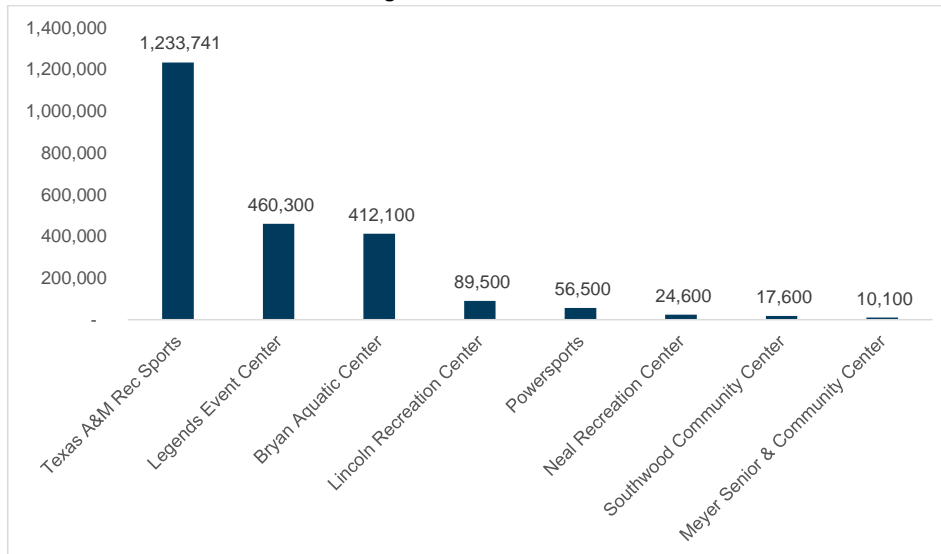
Table 3.4 reflects the similar providers data for annual visits and visitors in the last 12 months (February 2023 – 2024). The Texas A&M Rec Sports facility is the outlier with the most annual visits and visitors which may be due to increased visitation by those curious to see the Texas A&M campus and take tours.

**Table 3.4 Annual Visits and Visitors**

Facility	Visits	Visitors
<b>Bryan Aquatic Center</b>	412.1K	94.1K
<b>Legends Event Center</b>	460.3K	25.5K
<b>Lincoln Recreation Center*</b>	89.5K	24.1K
<b>Meyer Senior and Community Center*</b>	10.1K	3.9K
<b>Neal Recreation Center</b>	24.6K	7.9K
<b>Powersports</b>	56.5K	9.9K
<b>Southwood Community Center*</b>	17.6K	8K
<b>Texas A&amp;M Student Recreation Center</b>	1.2M	137.1K

*\*City of College Station facility*

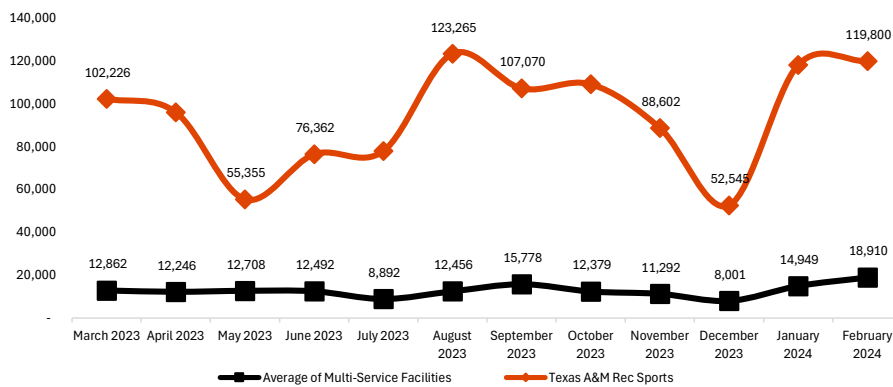
**Figure 3.2 Annual Visits**



## Average Monthly Visitation

Using the average number of visits across multi-service facilities provides an indication of overall trends to expect. The most visited months to these facilities include September, February, and October. The least most common months are April through July and December. Texas A&M was separated because of its significant visitation that differs greatly from the other facilities.

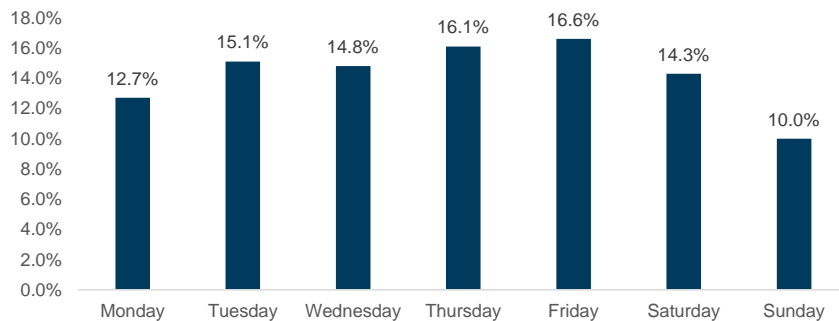
**Figure 3.3: Average Monthly Visitation**



## Average Daily Visitation

Across the multi-service facilities, the most popular days of the week on average were Fridays and Thursdays.

**Figure 3.4 Average Daily Visitation**

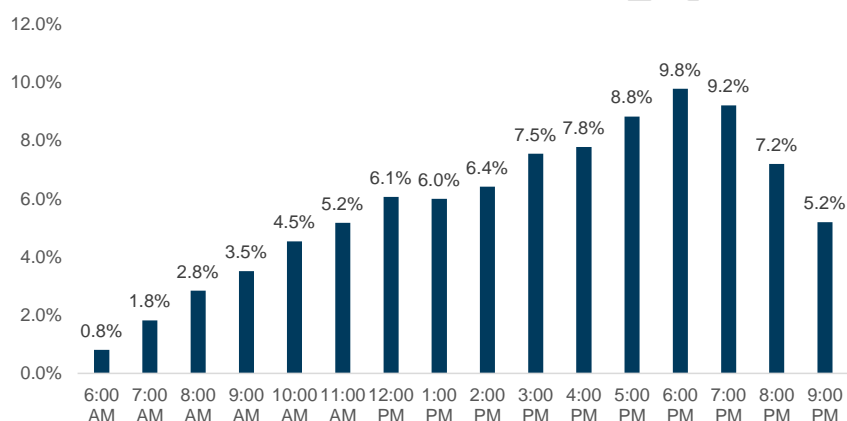




## Times of Day and Timing

Similar provider facilities saw peak attendance during the evening, typically between 4:00 p.m. to 8:00 p.m. On average, visitors are typically spending around 113 minutes at a facility.

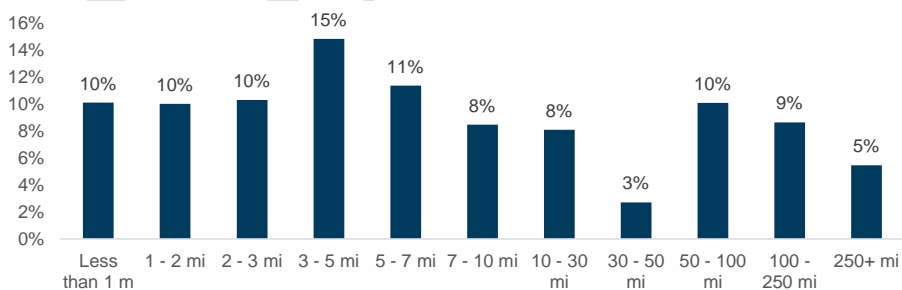
**Figure 3.5: Average Hourly Visitation**



## Willingness to Travel

Figure 3.6 reflects the average distance visitors are willing to travel to visit a facility. Visitors to similar facilities mostly live in a range of 3 – 5 miles from the facility.

**Figure 3.6: Distance Traveled to Facility**



## 4.0 Trends

### Introduction

This analysis examines current and future indoor recreation trends, levels of interest and participation in various activities, and overall trends in recreation relevant to College Station.

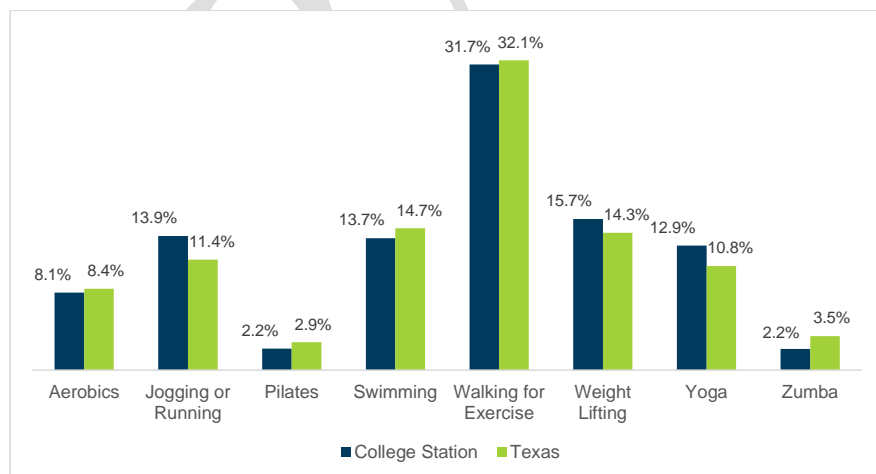
These types of trends can help the City of College Station understand how the community engages in fitness and sports activities, which can inform programming choices and facility design.

### Estimated Local Adult Participation for Fitness and Sports

Local adult participation was estimated for adult residents of College Station, 25 years and older. This analysis uses data from Esri Business Analyst, which combines information from the U.S. Census Bureau, Bureau of Labor Statistics, and other sources. These sources provide insights into national trends for participation and spending on various recreation, fitness, and leisure activities.

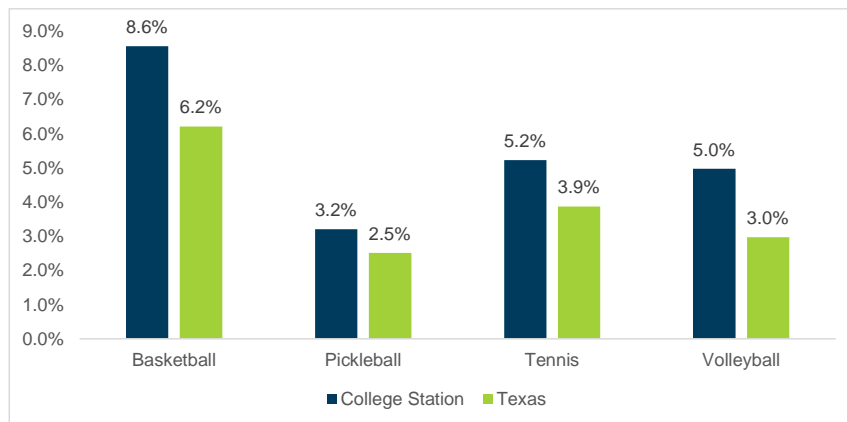
For general fitness activities, walking for exercise, weight-lifting, jogging or running, and swimming were the activities with the most participation.

**Figure 4.1: Local Participation in Fitness Activities**



The data below demonstrates that basketball has the highest participation of relevant indoor sports.

**Figure 4.2: Local Participation in Sport Activities**



Commented [BD1]: Remove baseball, football, golf, soccer, softball

Commented [BD2R1]: Add pickleball

## Fitness Trends

Each year, the American College of Sports Medicine (ACSM) conducts a survey of worldwide fitness trends. Now in its 18<sup>th</sup> year, the ACSM circulates an electronic survey to thousands of fitness professionals around the world to determine health and fitness trends. The list below includes the top 10 fitness trends for 2024.<sup>1</sup>

### 1. Wearable Technology

These devices can track heart rate, calories, sitting time, and much more.

### 2. Worksite Health Promotion

Employers can capitalize on this by fostering health-promoting behaviors such as physical activity and preventive screenings, leading to reduced insurance expenses, heightened productivity, and better mental health.

### 3. Fitness Programs for Older Adults

<sup>1</sup> Newsome, A. M. (n.d.). 2024 ACSM Worldwide Fitness Trends: Future Directions of ACSM's Health & Fitness Journal. Retrieved from <https://journals.lww.com/acsm-healthfitness/pages/articleviewer.aspx?year=2024&issue=01000&article=00007&type=Fulltext>

Aging heightens susceptibility to chronic illness, cognitive decline, and falls, making regular aerobic and muscle-strengthening exercises critical for mitigating these risks and preserving independence and quality of life as people age.

#### 4. Exercise for Weight Loss

By preserving lean body mass during weight loss endeavors, exercise facilitates sustained and lasting reductions in weight, underlining its significance in long-term weight management strategies.

#### 5. Reimbursement for Qualified Exercise Professionals (QEPs)

This trend represents a shift from previous years' advocacy for licensure for Qualified Exercise Professionals (QEPs), which faced significant policy-level obstacles, making it less feasible for the fitness industry globally. Instead, emphasis is now on reimbursement for services provided by QEPs, such as personal trainers and exercise physiologists, acknowledging their role within the healthcare continuum.

#### 6. Employing Certified Exercise Professionals

Employing certified professionals remains a top trend in the health and fitness industry, with companies recognizing the significance of hiring trained individuals to lead fitness programs. Accredited certifications signal to consumers that professionals possess proficient knowledge to assist them in achieving their fitness goals safely.

#### 7. Mobile Exercise Apps

These apps offer flexibility in program delivery, impacting the market with diverse options and proving effective in boosting users' physical activity levels.

#### 8. Exercise for Mental Health

Mental health, encompassing emotional, psychological, and social well-being, affects approximately one in every eight individuals globally according to the World Health Organization (WHO), highlighting the widespread significance of this trend. Resources provided by ACSM empower exercise professionals to integrate physical activity effectively to support mental health, underscoring the importance of exercise as a holistic approach to wellness.

#### 9. Youth Athletic Development

These initiatives focus on teaching fundamental movement patterns and preparing young individuals for skill acquisition, underscoring the importance of specialized training for exercise professionals working with this demographic.

#### 10. Personal Training



Consumers seeking effective exercise selection, safety protocols, and recovery techniques often find value in this personalized service. Exercise professionals equipped with nationally accredited credentials, such as those offered by ACSM, are well-prepared to cater to diverse client needs, underscoring the importance of professional certification for ensuring quality service delivery and client satisfaction.

### Pickleball Trends

Pickleball has seen exponential growth, becoming the fastest-growing sport in the U.S. due to its inclusive and accessible nature. The demand for court time is high, with an estimated need for 25,000 additional courts nationwide to meet current demand. The sport has experienced 223.50% participation growth in the last 3 years.

Converting vacant commercial and industrial spaces into pickleball centers is environmentally friendly and cost-effective, provided the spaces meet certain specifications.

Multi-court layouts maximize space efficiency and can facilitate tournaments. High-quality, gel-like soft surfaces mimic outdoor conditions and provide better player comfort. Noise reduction and LED lighting are also key features. Online reservations assist with attendance and help users book courts in advance.

Facilities are increasingly designed to be accessible to players of all ages and abilities, including wheelchair-friendly layouts and accessible amenities –broadening the play to elementary school students and beyond. This inclusivity broadens the sport's appeal and creates a welcoming environment for all.

**Table 4.1: Racquet Sport Participation Change Overtime**

Racquet Sport	1-year change (2019 – 2023)	3-year change (2020 – 2023)
Badminton	0.4%	11.1%
Pickleball	51.8%	223.5%
Racquetball	0.8%	3.6%
Squash	7.0%	13.0%
Table Tennis	-2.9%	-8.9%
Tennis	1.0%	10.1%

## Aquatic Trends

### Pool Design

Municipal pools have shifted away from the traditional rectangle shape, and instead have shifted to facilities that include zero-depth entry, play structures that include multiple levels, spray features, small to medium slides, and separate play areas segmented by age/ability.

Indoor warm water therapy pools continue to grow in popularity with the aging population; creating a shallow space for low-impact movement at a comfortable temperature enables programming options to multiply. “Endless” or current pools that are small and allow for “low-impact, high-intensity movement” are becoming popular, as well.

### Water Fitness

The concept of water fitness is a huge trend in the fitness industry, with many new programs popping up such as aqua yoga, aqua Zumba, aqua spin, aqua step, and aqua boot camp. Whether recovering from an injury, looking for ease-of-movement exercise for diseases such as arthritis, or simply shaking up a fitness routine, many demographics are gravitating toward the water for fitness. Partnerships can be important for parks and recreation agencies, such as working with hospitals to accommodate cardiac patients and those living with arthritis or multiple sclerosis.

### Youth Programming

Swim lessons generally include the most significant number of participants and revenues for public pool operations. Programs can be offered for all ages and levels, including private, semi-private, and group lessons. Access to swimming pools is a popular amenity for summer day camp programs, too.

### Spray Parks

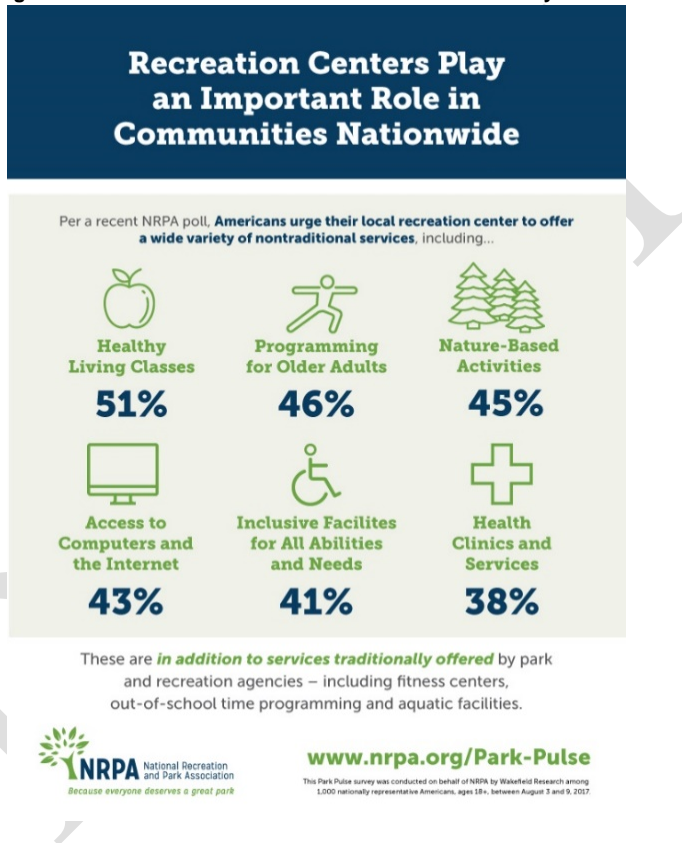
Spray parks (or spray grounds) are now a common replacement for aging swimming pools, particularly because they provide the community with an aquatic experience without the high cost of traditional pools. Spray parks do not require high levels of staffing, require only minimal maintenance, and offer a no-cost (or low-cost) alternative to a swimming pool. A spray park typically appeals to children ages 2 – 12 and can be a stand-alone facility in a community or incorporated inside a family aquatic center.

### Community Recreation Centers

Parks and recreation agencies serve their communities in many ways; one of the primary facilities that many agencies operate are community centers. These facilities may host a variety of amenities, such as sport courts, multi-purpose rooms, fitness gyms, aquatic facilities, and

much more. There has been a shift from traditional fitness and general activities in community centers to a more modern approach, which includes healthy living classes, computer classes/internet access, and older adult transportation. Data from NRPA indicates that recreation centers play an important role in communities across the country. The infographic in Figure 4.3 demonstrates the potential for non-traditional community services.<sup>2</sup>

**Figure 4.3 Non-Traditional Services Desired in Community Centers**



<sup>2</sup> NRPA. *Recreation Centers Play an Important Role in Communities*. National Recreation and Park Association. Accessed September 2019. [Recreation Centers Play an Important Role in Communities | Park Pulse | National Recreation and Park Association \(nrpa.org\)](http://www.nrpa.org/Park-Pulse)

## National Sports Participation

This section aims to identify and analyze current trends in sports and recreation, with a particular focus on participation trends derived from the Sports and Fitness Industry Association (SFIA) 2024 Report.<sup>3</sup> This data can help the City of College Station align its programs with current participation trends, ensuring they meet community interests.

For example, popular activities like basketball, tennis, and pickleball suggest that spaces like multi-use courts should be prioritized when planning a facility. However, declining activities like stationary cycling might help prevent unnecessary investment in expensive equipment. Recognizing these trends helps ensure efficient space utilization.

Basketball is the most popular team sport with 29.7 million participants.

Tennis is the most popular racquet sport with 23.8 million participants.

Pickleball participation grew by 51.8% in 2023.

Walking for fitness is the most prevalent form of aerobic exercise.

Tai chi saw a 16.3% increase in participation in one year; however, yoga continues to lead in popularity for conditioning activities.

Dance, step, and other choreographed exercises have grown by 3.3% since 2018, attracting 26.2 million participants each year.

Stationary cycling (group exercise) has been heavily impacted by at-home fitness equipment, declining by 6.2% in five years, with 6.2 million participants.

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<sup>3</sup> SFIA. February 27, 2024. *SFIA's Topline Participation Report Shows Strong Positive Trends Across All Sports and Fitness Categories*. Sports & Fitness Industry Association. Accessed April 8, 2024. [SFIA's Topline Participation Report Shows Strong Positive Trends Across All Sports and Fitness Categories](#)



## Top Trending Activities and Five-Year Growth

Figure 4.4 demonstrates the total U.S. participation rates for those 6 years and over from 2018 and 2023. Fitness has led in popularity the last five years.

**Figure 4.4: U.S. Participation 2018 vs 2023**

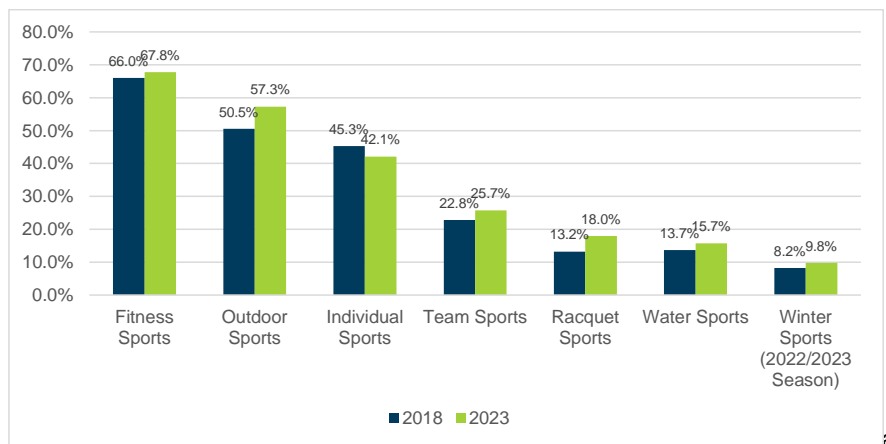


Table 5 shows the top activities by participation and growth rate over the past five years (2018 - 2023) from the latest SFIA report. This annual report tracks participation across the United States for ages six and older. Only participation for relevant activities to an indoor recreation center were included.

**Table 4.2 National Participation by Activity**

	2023 Participation (Millions)	5-Yr Growth (2018 - 2023)
<b>TEAM SPORTS</b>		
<b>Basketball</b>	29.7 M	+4.3%
<b>Swimming on a Team</b>	3.3 M	+2.1%
<b>Volleyball (Court)</b>	6.9 M	+2.3%
<b>RACQUET SPORTS</b>		
<b>Tennis</b>	23.8 M	+6.3%
<b>Badminton</b>	6.5 M	+0.6%
<b>Pickleball</b>	13.5 M	+35.7%
<b>STRENGTH AND CONDITIONING</b>		

Free Weights	53.8 M	+1.0%
Yoga	34.2 M	+3.6%
Weight-Resistance Machines	29.4 M	+1.0%
AEROBIC EXERCISE		
Treadmill	54.8 M	+0.7%
Running/Jogging	48.3 M	-0.5%
Stationary Cycling (Recumbent/Upright)	32.6 M	-2.0%

### Aspirational Activities of Inactive Americans

The SFIA report identifies the top indoor activities that inactive Americans are most interested in. This analysis summarizes the key themes from these activities. By understanding what activities might draw inactive residents in, the potential center can tailor its offerings to meet their needs and interests, potentially increasing membership and participation rates. This targeted approach can help ensure the center's programs are relevant, attract a broader audience, and promote a healthier community.

- **Aquatic Fitness:** Swimming for fitness is a popular choice across almost all age groups, indicating the value of having a swimming pool with programs for various skill levels and ages.
- **Gym and Strength Training:** Working out with weights and using machines is consistently popular from the teenage years into senior ages, suggesting a well-equipped gym area is essential.
- **Cardiovascular Health:** Activities such as running/jogging, which can be accommodated indoors on treadmills, and cardio fitness classes are important for a wide range of ages.
- **Group Exercise Classes:** Yoga appears in the aspirations of almost every age group, highlighting the demand for group fitness spaces that can accommodate yoga and other exercise classes.
- **Team Sports and Social Interaction:** Basketball and soccer are listed in the younger age groups, indicating an interest in team sports which can contribute to both physical fitness and social interaction.

## Summary

The discovery sessions conducted during engagement consisted of leadership interviews, stakeholder interviews, and community focus groups. The engagement findings can be found in Appendix B and needs assessment survey (Appendix A) confirms a need for the City to provide a community recreation center. The discovery sessions indicated that most community members aren't currently using the TAMU Recreation Facilities due to issues with parking, the young clientele (not family oriented), difficulty accessing facilities, and the facilities being overcrowded.

College Station's Parks and Recreation Department offers very limited indoor recreational opportunities. With the growing community, there will be additional opportunities to expand their offerings if the City provided indoor recreation facilities.

City of College Station facilities: The Lincoln Recreation Center, Southwood Community Center, and Meyer Senior and Community Center offer limited recreational opportunities, programs and amenities that cater to a minimal number of residents.

In future years, age distribution could prompt the College Station to diversify their offerings to older adults – prompting additional consideration for lifelong programs and events that cater to an older demographic. Data also suggests that the College Station will continue to see greater racial and ethnic diversity.

The facilities compared in the similar service provider analysis provide family-oriented community centers that offer multi-purpose spaces and a variety of health and wellness programs. This is the type of Community Recreation facility that the City of College Station needs to consider.

Insights from national trends highlight the necessity of adapting to emerging preferences, ensuring that the City of College Station remains a thriving hub for community engagement and healthy living. Key trends include:

- Shift toward enhancing in-person classes through additional online offerings and wearable technology
- Popularity of outdoor activities and holistic health approaches facilitated by the facility staff
- Growing importance of diversity, equity, and inclusion in recreational programming

Understanding these trends is necessary for informing potential development of an indoor recreational facility in the City of College Station.

Based on the market analysis and input received to date, there is market capacity to support a potentially successful municipally operated indoor community recreation center that will enhance the quality of life in College Station. This potential community recreation center could



address current facility and recreation program gaps in a continuously growing and evolving recreation/leisure services environment.

The following table summarizes the insights developed from the data presented in this market analysis, as well as the potential strategic impact if the facility was developed.

DRAFT

Market Analysis Insights	Potential Strategic Impact
<b>Demographics:</b> <p>College Station has a young median age (23.7 years) primarily due to the influence of Texas A&amp;M University. The City's population is expected to continue growing modestly over the next five years.</p>	<p>A new center could cater to the youthful and growing population, emphasizing facilities and programs that appeal to college students and young adults, such as fitness and recreational sports, while planning for slight growth.</p>
<b>Racial Diversity:</b> <p>Increases in Hispanic and Asian populations, with a decrease in the white population.</p>	<p>Programs and outreach could be inclusive and culturally diverse to engage the evolving demographic landscape effectively.</p>
<b>Benchmarking:</b> <p>College-centric communities typically have more and larger facilities compared to state and national averages.</p>	<p>A new center in College Station could consider emulating the larger space and diverse facility offerings found in other college-centric communities to meet the broad needs of its population.</p>
<b>Similar Providers:</b> <p>Eight similar providers and 30 niche fitness facilities identified that existing facilities include gyms, pools, and multi-purpose spaces.</p>	<p>To be competitive and fill market gaps, a new center might focus on offering unique or underserved services, or alternatively, look for synergies with niche facilities to offer a range of programs.</p>
<b>Visitation Data:</b> <p>High visitation rates at similar facilities, particularly Texas A&amp;M Rec Sports, which sees the most traffic.</p>	<p>Indicates a strong existing demand for recreational facilities. The new center would want to ensure it has the capacity and unique offerings to attract substantial patronage.</p>
<b>Amenities:</b> <p>Facilities like Lincoln, Southwood, and Meyer Senior Centers offer diverse amenities, including gymnasiums, fitness classes, and child care services.</p>	<p>A new center could consider incorporating diverse amenities that cater to a wide range of community needs, from youth to seniors, potentially including unique features that current providers do not offer.</p>

<b>Pricing Strategies:</b>  Different facilities have varying pricing strategies, some offering lower rates for residents and others providing tiered pricing for different services and age groups.	A flexible pricing strategy that offers value to both residents and non-residents could make a new center financially accessible while optimizing revenue potential.
<b>Annual Visits and Visitors:</b>  High visitation at facilities like Texas A&M Rec Sports (1.2 million visits annually) compared to other local facilities that also have high engagement, albeit at lower volumes.	High visitation at existing facilities suggests robust demand and indicates potential for a new facility if it can offer distinct or complementary services to what is already available.
<b>Peak Times and Duration of Visits:</b>  Peak visitation occurs in the evenings, with visitors spending an average of 113 minutes per visit.	A new center would need to plan for high capacity and extended hours during peak times and design spaces that can engage visitors for at least two hours, potentially with cafes or relaxation areas.
<b>Proximity of Visitors:</b>  Most visitors live within 3-5 miles of existing facilities.	The location of the new center would need to be strategically chosen to be easily accessible to the majority of its potential user base, ideally within a 3-5 mile radius of key residential areas.
<b>Niche Fitness Facilities:</b>  Existence of 30 niche fitness facilities, including yoga studios and CrossFit gyms, indicates a market for specialized fitness services.	A new center could incorporate or partner with niche fitness programs to broaden its appeal and cater to specific community interests, enhancing its overall marketability.
<b>Trends in Recreation:</b>  Increasing interest in personalized fitness programs, mental health-focused activities, and inclusive programs catering to a broader age range.	A center could incorporate flexible spaces for a variety of activities and programs that align with current and emerging fitness and wellness trends, such as spaces for mental health improvements and personalized training.