



College Station, TX

Meeting Agenda Tourism Committee

1207 Texas Ave, College Station, TX 77840

Internet: www.microsoft.com/microsoft-teams/join-a-meeting

Meeting ID: 213 389 976 297 Passcode: oG3vW2Mi

Phone: 979-431-4880 / Phone Conference ID: 833 345 516#

The City Council may or may not attend this meeting.

April 30, 2025

3:00 PM

Visit College Station Large
Conference Room

1. Call to order and introductions.

2. Hear Visitors.

At this time, the Chairperson will open the floor to citizens wishing to address issues not already scheduled on today's agenda. Each citizen's presentation will be limited to three minutes in order to allow adequate time for the completion of the agenda items. Comments will be received and city staff may be asked to look into the matter, or the matter may be placed on a future agenda for discussion. A recording may be made of the meeting; please give your name and address for the record.

3. Agenda Items

- 3.1. Presentation, discussion, and possible action on the minutes of the previous meeting.
- 3.2. Presentation, discussion, and possible action on data reports from the previous month.
- 3.3. Presentation, discussion, and possible action on the Tourism Strategic Plan.
- 3.4. Presentation, discussion, and possible action on the Convention Center Feasibility Study.
- 3.5. Presentation, discussion, and possible action on the FY25 use of the HOT Fund and FY26 Budget Requests.
- 3.6. Presentation, discussion, and possible action on current Hotel Occupancy Grants and processes.

4. Discussion and possible action on future agenda items.

A member may inquire about a subject for which notice has not been given. A statement of specific factual information or the recitation of existing policy may be given. Any deliberation shall be limited to a proposal to place the subject on an agenda for a subsequent meeting.

5. Adjourn.

The Board or Commission may adjourn into Executive Session to consider any item listed on the agenda if a matter is raised that is appropriate for Executive Session discussion.

I certify that the above Notice of Meeting was posted on the website and at College Station City Hall, 1101 Texas Avenue, College Station, Texas, on April 25, 2025 at 5:00 p.m.

City Secretary

This building is wheelchair accessible. Persons with disabilities who plan to attend this meeting and who may need accommodations, auxiliary aids, or services such as interpreters, readers, or large print are asked to contact the City Secretary's Office at (979) 764-3541, TDD at 1-800-735-2989, or email adaassistance@cstx.gov at least two business days prior to the meeting so that appropriate arrangements can be made. If the City does not receive notification at least two business days prior to the meeting, the City will make a reasonable attempt to provide the necessary accommodations.

Penal Code § 30.07. Trespass by License Holder with an Openly Carried Handgun.

"Pursuant to Section 30.07, Penal Code (Trespass by License Holder with an Openly Carried Handgun) A Person Licensed under Subchapter H, Chapter 411, Government Code (Handgun Licensing Law), may not enter this Property with a Handgun that is Carried Openly."

Codigo Penal § 30.07. Traspasar Portando Armas de Mano al Aire Libre con Licencia.

"Conforme a la Seccion 30.07 del codigo penal (traspasar portando armas de mano al aire libre con licencia), personas con licencia bajo del Sub-Capitulo H, Capitulo 411, Codigo de Gobierno (Ley de licencias de arma de mano), no deben entrar a esta propiedad portando arma de mano al aire libre."



College Station, TX

Minutes

Tourism Committee

1207 Texas Ave, College Station, TX 77840

Internet: www.microsoft.com/microsoft-teams/join-a-meeting

Meeting ID: 281 643 426 251 | Passcode: AU7Lx3FE

The City Council may or may not attend this meeting.

March 26, 2025

3:00 PM

1207 Event Space

Commission members present: Courtney Phillips, Greg Stafford, Connor Clark, Scott Logan, Paul Loy, Bill Peel, Jim Ross, Rhianon Whitney

Commission members absent: Costa Dallis, Hunter Goodwin, Brandy Tuck

Staff present: Bryan Woods, Michael Ostrowski, Kelsey Heiden, Jeremiah Cook, Jo Beth Wolfe, Alex Aguero, Angie Bertinot

1. Oath of Office and Statement of Appointed Officer.
2. **Call to order and introductions.**
Chairperson Phillips called the meeting to order at 3:06 PM.
3. **Hear Visitors.**
No visitors were present.
4. **Agenda Items**
 - 4.1. Presentation, discussion, and possible action on the appointment of a vice-chairperson.
Motion by Chairperson Phillips to appoint Greg Stafford as Vice Chair; seconded by Commissioner Logan. Motion carried 8-0.
 - 4.2. Presentation, discussion, and possible action on future meeting dates for the Tourism Committee.
Motion by Commissioner Logan to have the monthly meetings occur on the last Wednesday of the month at 3:00PM; seconded by Commissioner Whitney. Motion carried 8-0.
 - 4.3. Presentation, discussion, and possible action on an orientation to the Tourism Committee.
Staff gave a presentation on the role of the Tourism Committee and the work of the Tourism division of the Economic Development & Tourism Department. Members asked questions about the marketing, sports, and conventions work of the tourism division.
5. **Discussion and possible action on future agenda items.**
Members requested future agenda items on HOT grants, HOT funding, marketing plans, Convention Center Feasibility Study, Tourism Strategic Plan, and the College Station brand book.
6. **Adjourn.**
Motion by Commissioner Stafford to adjourn at 5:37PM; seconded by Commissioner Peel. Motion carried 8-0.

April 30, 2025
Item No. 3.2.
Data Reports

Sponsor: Jeremiah Cook, Assistant Director - Tourism

Reviewed By CBC:

Agenda Caption: Presentation, discussion, and possible action on data reports from the previous month.

Relationship to Strategic Goals:

Diverse & Growing Economy

Recommendation(s): Staff recommends the Committee receive the presentation and provide direction.

Summary: Staff will present on the data reports from the previous month.

Budget & Financial Summary: N/A

Attachments:

None

April 30, 2025
Item No. 3.3.
Tourism Strategic Plan

Sponsor: Jeremiah Cook, Assistant Director - Tourism

Reviewed By CBC: N/A

Agenda Caption: Presentation, discussion, and possible action on the Tourism Strategic Plan.

Relationship to Strategic Goals:

Diverse & Growing Economy

Recommendation(s): Staff recommends the Committee receive the presentation and provide direction.

Summary: Staff will provide an update on the Tourism Strategic Plan and its process.

Budget & Financial Summary: N/A

Attachments:

1. Tourism Strategic Plan Scope of Services

EXHIBIT A
SCOPE OF SERVICES/WORK

The terms and conditions of this Contract shall take precedence and control over any term or provision of the Scope of Services/Work that in any way conflicts with, differs from, or attempts to alter the terms of this Contract.

See attached Scope of Services/Work on following pages.

Our Understanding of the Project

JLL understands that Visit College Station, as the official destination marketing organization (DMO), is interested in developing a Strategic Plan for Tourism for the community and destination. Through the RFP process, JLL understands that the Client strives to achieve the following:

- Create a well-researched, data-driven plan for College Station's tourism development.
- Ensure broad participation and support from community partners, local stakeholders, and officials.
- Compare College Station with similar cities and aspirational destinations to set realistic goals and identify growth opportunities.
- Better demonstrate the economic impact of tourism, meetings and sports events on local communities.
- Create stronger brand perceptions for College Station and its key attributes.
- Develop priority recommendations for infrastructure projects that aid visitors as well as residents.
- Establish key performance indicators (KPIs) and monitoring processes to track progress and success.
- Establish stronger civic pride and community buy-in to tourism and its benefits.

JLL understands that the Client selected JLL to achieve the above based on the proposal submitted. Therefore, JLL has outlined the following scope of services to complete the Destination Strategic Plan development.

Scope of Services

Phase 1

1. Project Alignment
 - a. JLL will meet with key project stakeholders to kick off the project. JLL will interview key stakeholders identified to understand their perspectives and goals for College Station as a visitor destination. From these initial interviews, JLL will confirm the direction and gain consensus from vested parties on their respective positions to move forward.
2. Development of a Steering Committee
 - a. JLL will work with Visit College Station to develop a steering committee comprised of local tourism and thought leaders in the community. The group will meet monthly throughout the planning process to provide input, refine messaging and act as a sounding board for the team, in addition to helping focus concepts into priorities and measurable strategies for implementation.
3. Stakeholder Engagement
 - a. JLL will organize focus groups based on key industries and interview stakeholders in relation to the Plan's development. JLL will conduct 5-7 focus groups and individual interviews with key stakeholders. JLL will conduct a stakeholder survey and distribute that survey to Visit College Station stakeholders and community leaders. JLL will analyze results of the survey and aggregate key themes of stakeholder feedback for the Client's review.

Phase 2

4. Competitive Positioning Benchmarking
 - a. JLL will study up to five destinations that are part of College Station's competitive set. Separately, JLL will analyze up to five aspirational destinations that serve as benchmarks

for College Station's tourism development objectives. JLL will study these ten destinations in three areas: built environment, industry performance and organizational positioning.

5. Tourism Readiness & Sustainability Analysis
 - a. JLL will study the destination infrastructure and consider the impact tourism growth will have on the existing built environment as well as the long-term sustainability of the tourism ecosystem. This will include environmental sustainability as well as the overall tourism industry's ability to be regenerative.
6. Demand Driver Scorecard
 - a. JLL will study the inventory of tourism-facing assets as individual demand drivers. JLL will rate those individual assets and determine which and how many are resulting in overnight stays today and identify which assets could be enhanced or positioned differently in the future to drive incremental demand.
 - b. JLL will also study the inventory and performance of existing sports and conventions tourism infrastructure, locations, venues and events will be analyzed in the Demand Driver Scorecard.
7. Event Matrix
 - a. JLL will perform a detailed inventory and audit of existing leisure as well as sporting events in College Station and neighboring cities as applicable to include location, tourism draw, and recommendations on enhancement or additions.
 - b. Following the analysis, we will conduct interviews with at least 5 of the previously listed local event organizers to gain information about their events as well as priorities for future expansion.



Phase Three

8. Priority Identification
 - a. JLL will use the data and feedback gathered from Phases One and Two to classify destination priorities and key focus areas. JLL will develop priorities that will each include recommendations, milestone timelines, key action steps and identified lead partners.
9. Organizational Infrastructure and Positioning
 - b. JLL will review Visit College Station by department to understand current organizational needs and operational functionalities. JLL will also make recommendations for the organization based on the ability to implement the priorities identified.
10. Funding Source Strategies
 - c. JLL will review existing funding conditions and projected funding needs based on the priorities identified. JLL will recommend potential funding sources or additional ways to generate new revenue while not compromising Visit College Station's existing funds.
11. Development of Final Destination Strategic Plan
 - a. JLL will develop a draft report in Word for the Visit College Station internal team to review and provide feedback on. JLL will take all feedback received on the draft and finalize the plan to include an executive summary, market study, overarching goals, priority areas, recommendations objectives and tactics for implementation as well as milestones for implementation.
12. Final Presentation(s)
 - a. JLL will present the final plan materials to Visit College Station leadership and key stakeholders upon completion.

Visits & Team

JLL will travel to meet the Client for the duration of the scope of services up to three times. Travel time and all meetings are included in the scope above.

JLL Vice President, Shirin Jafari will lead the project and be responsible for service delivery. Ms. Jafari will be supported by additional members of the JLL Tourism & Destination Advisory team as needed.

Timeline

JLL estimates a 9-month timeline to complete the scope of services above.

Compensation

JLL's professional fees for the scope of services shall not exceed \$85,000. In addition to professional fees, JLL will also be reimbursed for actual out-of-pocket expenses incurred in conjunction with this engagement, to include such items as reasonable travel costs (including flights, meals and hotel accommodations), data purchases and reproduction with no mark-up. JLL must obtain Client written approval prior to incurring out-of-pocket expenses.

The provisions of this letter agreement shall be governed and controlled by the terms and conditions set forth in the General Services Contract ("Agreement") and Exhibit A attached hereto and incorporated by reference.



EXHIBIT A TERMS AND CONDITIONS

INDEPENDENT CONSULTANT STATUS AND SUBCONTRACTORS

JLL will act solely as an independent contractor in performing the Services, and nothing in this letter agreement will at any time be construed to create the relationship of employer and employee, principal and agent, partners, or joint venturers between Client and JLL, or Client's officers, directors, partners, managers, employees or agents and JLL's officers, directors, partners, managers, employees or agents. JLL shall be solely responsible for the compensation, benefits, contributions and taxes, if any, of its employees, subcontractors and agents.

CONFIDENTIALITY

Notwithstanding the terms herein, both parties acknowledge Client is subject to the Texas Public Information Act and may be required to release information in response to a request for information. Both parties shall treat as confidential property and not disclose to others during or subsequent to the term of this letter agreement, except as necessary to perform this letter agreement (and then only on a confidential basis satisfactory to both parties), any information and documents which are received from the other party and identified as "Confidential." Both JLL and Client shall also treat as confidential and shall not disclose to others, except as required by law, this form of letter agreement. Client shall automatically treat JLL's "copyrighted" work product and proprietary software programs as "Confidential" and shall not reuse or share such Confidential information with other outside consultants, or third parties, without the prior written consent of JLL.

Nothing above, however, shall prevent either party from disclosing to others or using in any manner information, which that party can demonstrate:

- A. Has been published and has become part of the public domain other than by acts, omissions or fault of the party to this letter agreement receiving such Confidential information, their employees, agents, contractors and/or consultants; or,
- B. Has been furnished or made known to the party to this letter agreement receiving the Confidential information by a third party (other than those acting directly or indirectly for or on behalf of JLL or Client) as a matter of legal right without restrictions on its disclosure; or,
- C. Was in either party's possession prior to disclosure thereof by the other party.
- D. Must be disclosed pursuant to any statute, law, regulation, ordinance, order or decree of any governmental authority having jurisdiction over the party to this letter agreement receiving the Confidential information or any of its employees, agents, contractors and/or consultants.

The foregoing obligations of confidentiality in this letter agreement shall survive for a period of one (1) year from the mutual execution of this letter agreement.

VERIFICATION AND RELIANCE

The data, documentation, and assumptions derived from information supplied by Client, published information, prepared by JLL in the regular course of its business, and other industry sources will not be independently verified by JLL for purposes of this Agreement. JLL will not be responsible for the accuracy of such data and information, and for any assumptions derived therefrom. The information furnished by others is believed to be reliable, but no warranty is given for its accuracy. However, JLL's performance will be based on JLL's professional evaluation of all such available sources of information. Client acknowledges and agrees that there may be differences between projected and actual results because events and circumstances frequently do not occur as predicted, and those differences may be material and hereby



releases JLL from any claims or liability arising from these differences. JLL is not obligated to predict future political, economic or social trends. JLL assumes no responsibility for economic factors that may affect or alter the opinions in this report if said economic factors were not present as of the date of the letter of transmittal accompanying this report.

The parties understand and agree that neither JLL's fees nor the payment thereof by Client is contingent upon the results, conclusions or recommendations provided by JLL.

INTELLECTUAL PROPERTY

Notwithstanding any term in this letter agreement to the contrary, JLL shall retain all right, title, and interest in any and all intellectual property: (i) created by JLL prior to this letter agreement, including (without limitation) JLL's proprietary software programs and processes for providing services and (ii) created by JLL during the term of this letter agreement in the normal course of business for JLL's clients generally.

April 30, 2025

Item No. 3.4.

Presentation, discussion, and possible action on the Convention Center Feasibility Study.

Sponsor: Jeremiah Cook, Assistant Director - Tourism

Reviewed By CBC: City Council

Agenda Caption: Presentation, discussion, and possible action on the Convention Center Feasibility Study.

Relationship to Strategic Goals:

Diverse & Growing Economy

Recommendation(s): Staff recommends the Committee receive the presentation and provide direction.

Summary: In October 2024, the City Council approved a contract with Hunden Strategic Partners to perform a convention center needs analysis. The analysis is broken into two phases, with phase one determining the potential market demand for a facility, and phase two determining the facility and programming, site evaluation, feasibility, financing options, economic impact analysis, and return on investment. The findings of phase one suggest a general market need for a center. Phase two is currently underway, and it is anticipated to be completed in June 2025. Attached are the findings of phase one.

Budget & Financial Summary: N/A

Attachments:

1. College Station CC & Hotel Phase I Findings 3-14-25 (Hunden)

College Station, Texas Convention Center & Hotel

Market Demand, Financial
Feasibility & Impact Study

Phase 1: Preliminary Findings

February 17, 2025



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Executive Summary



1. Economic, Demographic & Tourism Analysis



2. Convention & Meetings Market Analysis

Entertainment Market Analysis



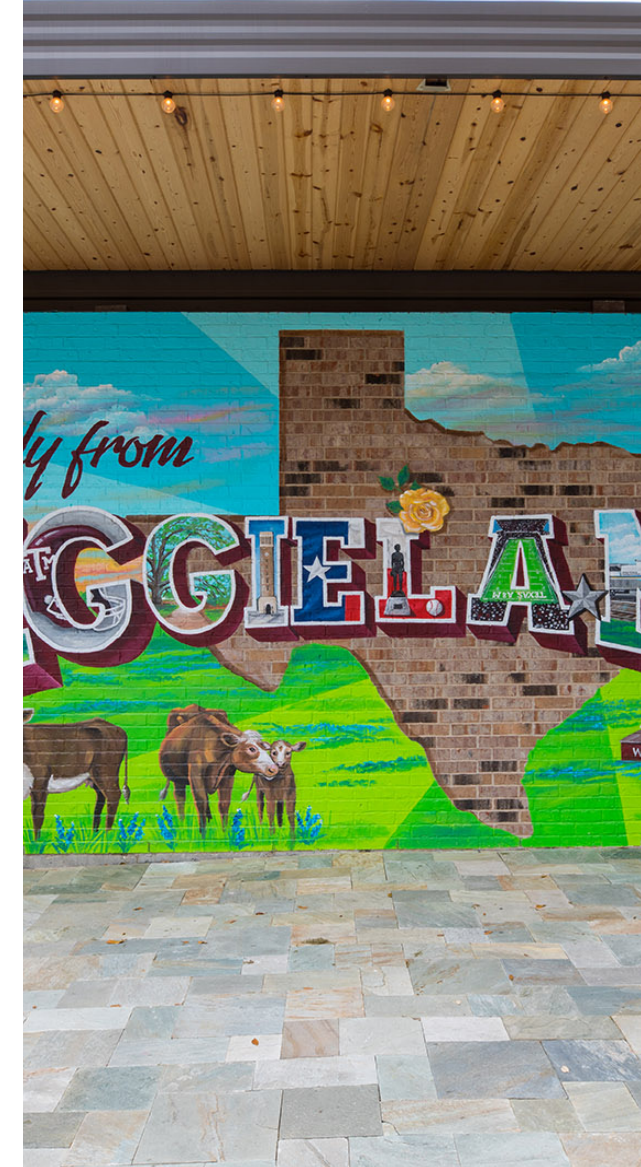
3. Hotel & Walkable Package Analysis



4. Case Studies & Best Practices



5. Recommendations & Next Steps



Executive Summary Overview



Why We're Here/Key Questions



Industry Trends & Best Practices



Demand Interviews Summary



Local & Regional Market Findings Headlines



Case Studies Summary



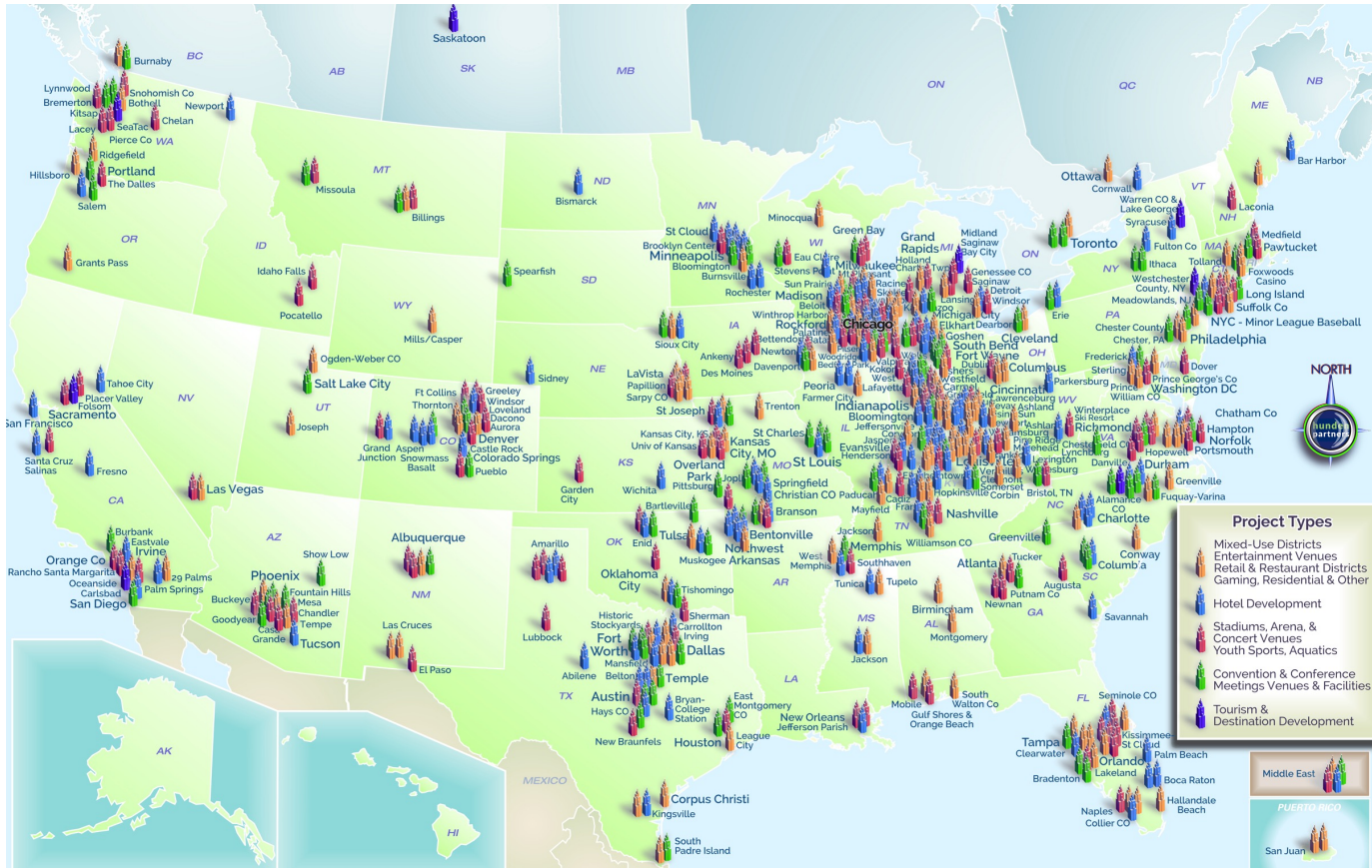
Preliminary Recommendations



Next Steps



hunden partners applies market realities to Live / Work / Play / Visit placemaking



HUNDEN QUALIFICATIONS: Hunden Partners is a full-service global real estate development advisory practice, providing public and private sector clients with confidence and results so they can move their projects from concept through execution. With more than 28 years of experience on 1,000+ projects, Mr. Hunden and his team are relied-upon guides and advisors that provide owner's representation services, project management and strategy, and the individual components of the process: feasibility and financing studies, impact analysis, governance/management structures, deal negotiation and team-assembly – managing RFQ/P processes for developers, architects, construction, management companies and service providers.

Hunden Partners professionals have provided all the above services for hundreds of client projects worldwide for the public, non-profit and private sectors. In addition, our professionals have prior professional career experience in municipal and state government, economic and real estate development, real estate law, hotel operations, and non-profit management. More than 80 percent of our clients are public entities, such as municipalities, counties, states, convention bureaus, authorities and other quasi-government entities empowered to conduct real estate, economic development, and tourism activities.

- Entertainment Venues & Mixed-Use Districts
- Stadiums, Arenas & Event Centers
- **Convention & Conference Centers**
- **Headquarters, Conference & Boutique Hotels**
- Tournament Sports Complexes
- Retail, Restaurant, Residential, Office
- University Assets & Districts
- Fairgrounds & Expos
- Fine Arts Venues, Distilleries & Attractions



Executive Summary

Introduction



hunden partners TVS

The City of College Station ("City") was engaged by Hunden Partners ("Hunden") to complete a market demand, feasibility, and economic impact study for a proposed convention center in College Station, Texas ("Study"). In collaboration with TVS Architecture and Design, the multidisciplinary team ("Team") will assess proposed sites, meeting space demand, and local competition.

ASSUMPTIONS AND CONDITIONS: This report has been prepared under the following general assumptions and limiting conditions:

The findings presented herein reflect analysis of primary and secondary sources of information assumed to be correct. Hunden utilized sources deemed to be reliable but cannot guarantee accuracy.

- Hunden's analysis is based on publicly available information and industry.
- No responsibility is taken for changes in market conditions after the date of this report and no obligation is assumed to revise this report to reflect events or conditions occurring thereafter.
- Hunden has no control over construction costs or timing of construction and opening.
- Macroeconomic events affecting events, travel, and the economy cannot be predicted and may impact the development and performance of the venues, real estate and overall organization.

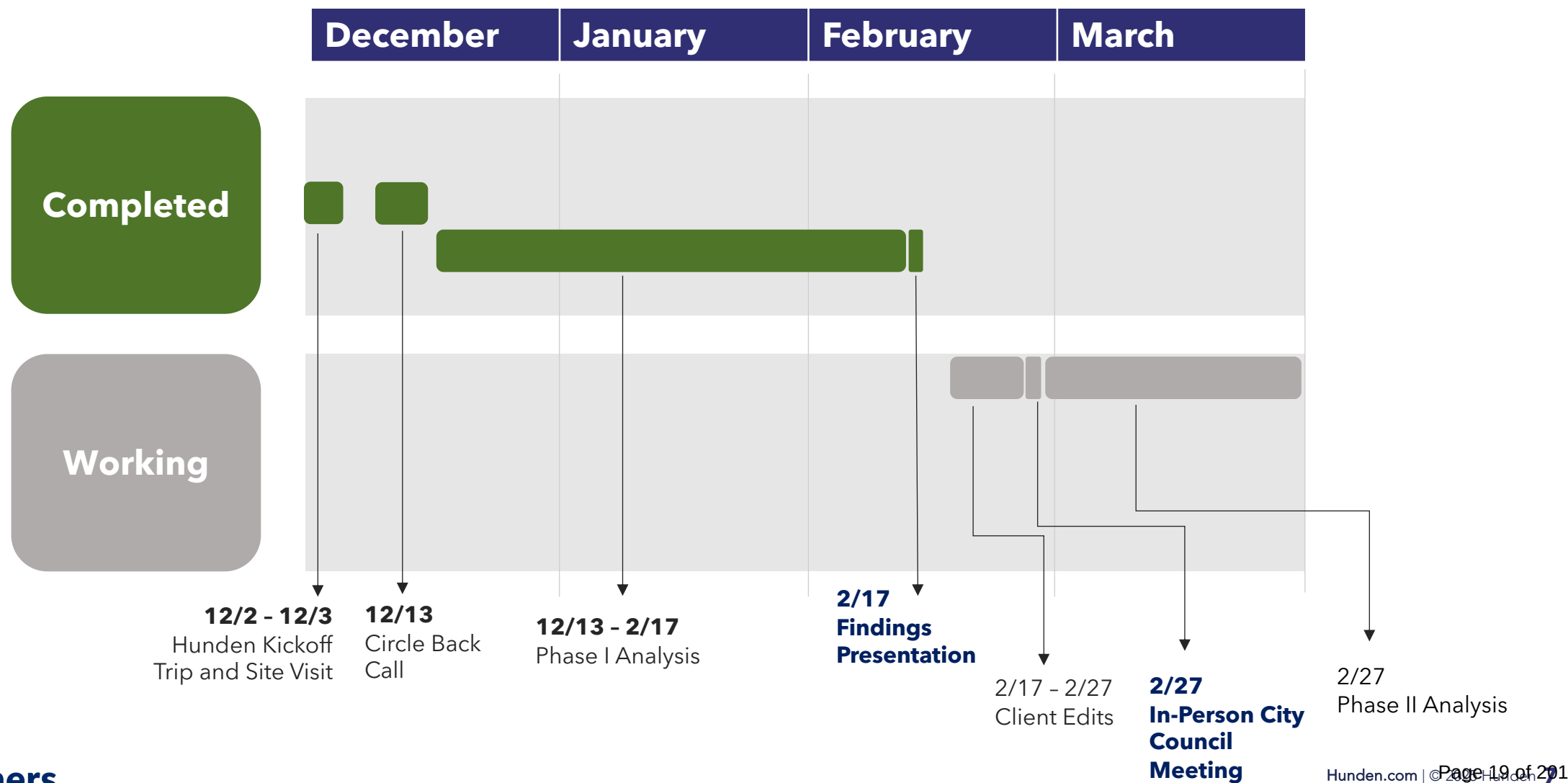
We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely yours,

Hunden Partners



Tentative Project Status & Timeline - 2024/2025



Contents of Study

Hunden's scope of work is divided into two phases. Phase One focuses on market demand for a convention center, along with facility and program recommendations. Phase Two (initiated upon written authorization from the City) includes site evaluations, financing considerations, and detailed demand, financial projections, and economic impact analyses.

Phase I

Task I. Market Demand Analysis

- Economic, Demographic and Tourism Analysis
- Convention and Meetings Market Analysis
- Hotel and Walkable Package Analysis
- Case Studies and Best Practices

Task II. Facility and Program Recommendations

Phase II

Task III. Site Evaluation

Task IV. Feasibility Study (Demand and Financial Projections)

Task V. Financing Options

Task VI. Economic Impact Analysis

Task VII. Return on Investment

Why We're Here

- College Station loses business without a dedicated convention center
- Texas A&M event space is hard to market to outside groups
- Rising A&M enrollment limits available space for external events
- Texas is in a competitive “space race” for convention facilities
- Growing statewide associations seek new venues and rotate often – College Station misses out
- Rapid growth justifies investment in economic development
- College Station can outcompete Houston on cost and convenience
- Local events are outgrowing available venues
- A multipurpose facility would recapture lost business (sports, entertainment, conventions, meetings)

Potential Opportunity: A multipurpose convention/event center designed to attract external business, including conventions, meetings, niche indoor sports, and live-ticketed entertainment.

Key Questions & Considerations

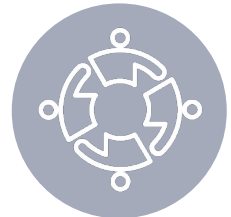
- How does the local and regional supply of meeting facilities, including Texas A&M's, impact the need for a dedicated convention center?
- What is the state of hotel supply and demand, and how does it affect development recommendations?
- Is College Station positioned for a convention center? What is the market opportunity for conventions and conferences?
- What are the key needs of user groups and meeting planners in the region?
- How strong is the market opportunity for rotating state associations and other event types?
- What is the demand for additional indoor events, such as sports tournaments and live entertainment?
- Is additional hotel product needed to support a convention center, and if so, how large and of what scale?
- Is a convention center supported in College Station? If so, what is the optimal program of the complex?
- Would the need for a dedicated convention center in College Station change if Texas A&M facilities were readily available to non-university groups?

Study Methodology & Project Overview

Phase I

Phase I

Phase II



Where are you now?



How do you stack up?



What are the opportunities?



How do we get there?

Current College Station & Surrounding Market Assessment

Hunden analyzed College Station's current competitive positioning, impact of nearby hotels, walkable amenities, and demand drivers to benchmark the market's appeal as a meetings and events destination. Several user group and meeting planner interviews were conducted to help inform the Project.

Market Opportunities Assessment & Future Recommendations

Based on local and competitive market research, comparable case studies and stakeholder engagement, Hunden formed recommendations for an optimal development scenario, a convention center and hotel.

Site Selection/ Financial & Impact Projections, Funding Analysis

If Phase Two proceeds, TVS will assess potential sites and develop layouts for the recommended development. Cost estimates will follow. Hunden will analyze demand, financial projections, and the Project's economic, fiscal, and employment impact, including tax revenue.

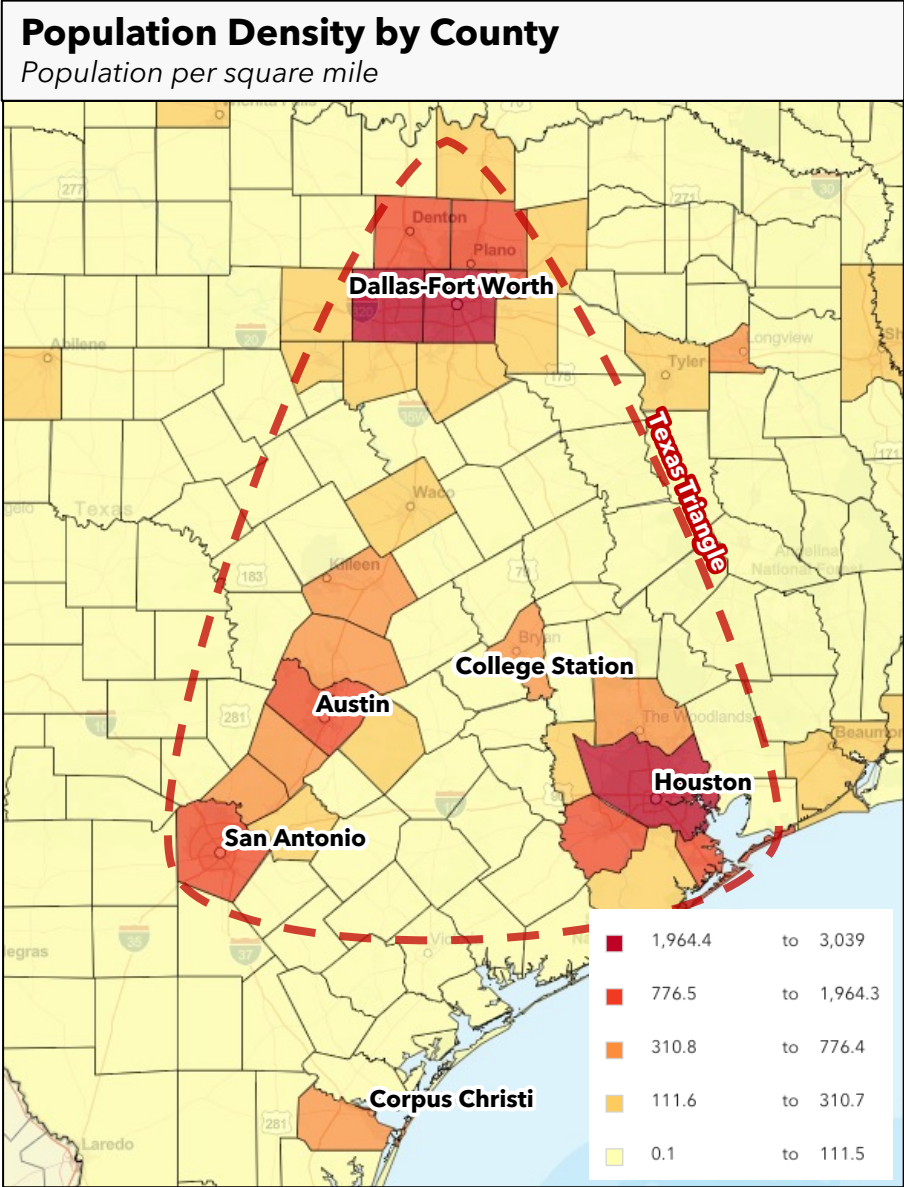
Population

College Station is located in the “Texas Triangle,” one of the most economically vibrant and fastest-growing regions in the nation.

During the period between 2010 to 2024, this region experienced significant population increases at the city, county, and state levels. The significant growth in College Station is primarily attributed to large increases in student enrollment at Texas A&M University in recent years. While population growth at the city level is projected to slow, it is expected to remain positive through 2029.

Population and Growth Rates					
	Population				Percent Change
	2010	2020	2024	2029 Projected	2010 - 2024
United States	308,745,538	331,449,281	338,440,954	344,873,411	9.6%
Texas	25,145,558	29,145,505	30,857,478	32,581,174	22.7%
College Station-Bryan, TX MSA	228,660	268,248	283,518	298,151	24.0%
Brazos County	194,851	233,849	247,878	261,606	27.2%
College Station	94,228	120,511	126,637	132,359	34.4%
Bryan	76,410	84,006	89,157	94,481	16.7%
Kurten	398	395	436	476	9.5%
Wixon Valley	254	228	257	273	1.2%

Source: U.S. Census Bureau



Meetings Industry Overview

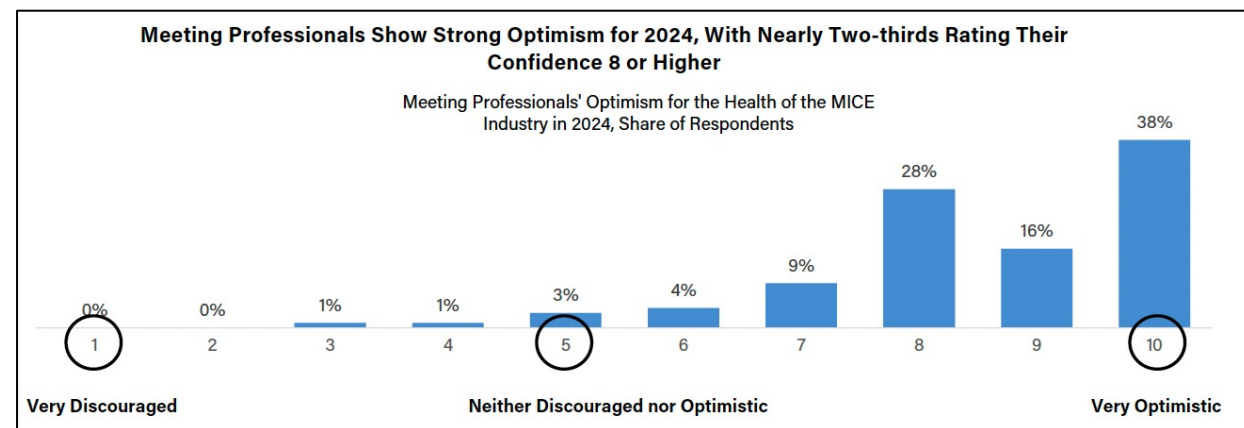
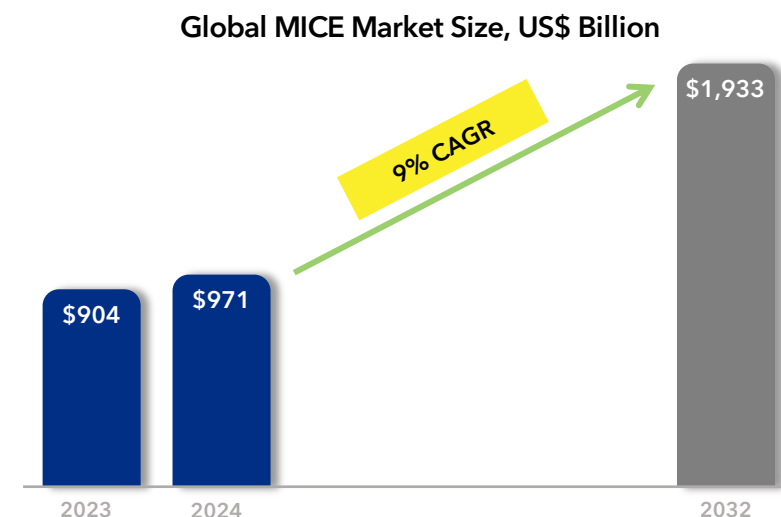
The meetings industry has evolved significantly since the pandemic. Meeting planners and user groups are now seeking innovative spaces that offer more flexibility and engagement options.

- Traditional large exhibit halls are no longer a necessity.
- Ballrooms and breakout rooms are in higher demand than ever.
- Outdoor and hybrid spaces have become popular for fostering engagement and comfort.



Meetings Industry Recovery and Growth Outlook

- **Demand Growth Accelerating:** The meetings sector is expected to achieve a compound annual growth rate (CAGR) of nine percent by 2032 as the demand for in-person meetings accelerates.
- **Industry Confidence Is High:** 82 percent of meetings professionals rate their optimism at 8 or above, with 38 percent giving a perfect 10 – mirroring the positive outlook of travel CEOs for the future of events.
- **Groups Implementing Cost Control Strategies:** Companies are adjusting budgets by opting for more cost-effective solutions, such as choosing three-star hotels instead of four-star accommodations.



Source: Skift Research State of Travel Report 2024

*MICE: Meetings, Incentives, Conferences, and Exhibitions

Convention Centers

Key Takeaways & Lessons Learned

Convention centers are vital community assets. While often operating at a loss, they play a crucial role in enhancing quality of life, attracting visitors, and spurring local development. Successful developments require strategic planning, innovative funding, and experienced management. Below are key takeaways and lessons learned for the Project through industry feedback and case study analysis:

- **Walkable/Connected Hotels:** Proximity to walkable or connected hotel accommodations is a critical factor in event and meeting venue selection.
- **Optimal Programming:** A well-balanced mix of meeting space sizes and types, paired with up-to-date AV and tech, maximizes the venue's appeal to diverse groups.
- **Professional Management:** Expert management with experience in multipurpose venues ensures operational efficiency, revenue growth, and alignment with community goals.
- **Creative Event Programming:** Diversify revenue streams by hosting a variety of events, from sporting activities to local community gatherings, beyond typical conferences.
- **Event Experience & Amenities:** Event organizers seek unique, interactive environments with natural light, open spaces, and engaging features. Accessible food & beverage options and entertainment are key to enhancing guests' experience.
- **Facility Upgrades:** Implement a capital improvement plan to support ongoing upgrades and ensure long-term viability.
- **Economic Catalyst:** Convention centers can drive surrounding development and serve as activity hubs, stimulating local economies.



Stakeholder Feedback Summary

20

Stakeholder Meetings

12

Associations, Event Planners, User Groups

2

Regional Convention Centers

Associations, Event Planners, User Groups

- Texas Society of Association Executives (TSAE)
- Meeting Planners International (MPI)
- Texas Association of School Administrators (TASA)
- Texas Energy Managers Association (TEMA)
- Texas Municipal League (TML)
- Texas Association of Counties (TAC)
- Texas Agricultural Aviation Association (TAAA)
- PRA Event Management
- Freeman Company
- Various Sports User Groups

Local & Regional Stakeholders

- Visit College Station
- Hilton College Station
- Texas A&M Conference Center Hotel
- Greater Brazos Partnership
- ASM Global
- Live Nation
- Waco Convention Center
- Plano Convention Center

Stakeholder Feedback Themes

The following themes capture the key focus areas from stakeholder discussions and support the formulation of recommendations and study conclusions.

Rotating state associations would consider College Station if a new convention center is built. These groups prioritize ample ballroom and breakout space

An optimal development would include approximately **100,000 to 200,000 square feet of sellable function** space and at **least 250 hotel rooms**

A new facility should feature a **50,000- to 75,000-square-foot exhibit hall** for trade shows and conferences. Exhibit space is oftentimes overdone; prioritize ballroom and meeting space

Divisible ballroom space of **25,000 to 55,000 square feet** with seating for at least 500 guests is crucial for larger gatherings. Ballroom space is often underserved in regional facilities

Walkable hotels are preferred; however, a connected hotel is most ideal

Limited airlift poses challenges for corporate events, but College Station's central location and drive-in accessibility appeal to state associations

The facility should be multipurpose, with the ability to accommodate live entertainment and various sports groups

Walkable amenities such as restaurants, bars, and attractions are highly desirable

Texas A&M's event facilities prioritize athletics and student groups, which can lead to scheduling challenges and limited reliability for corporate and association events

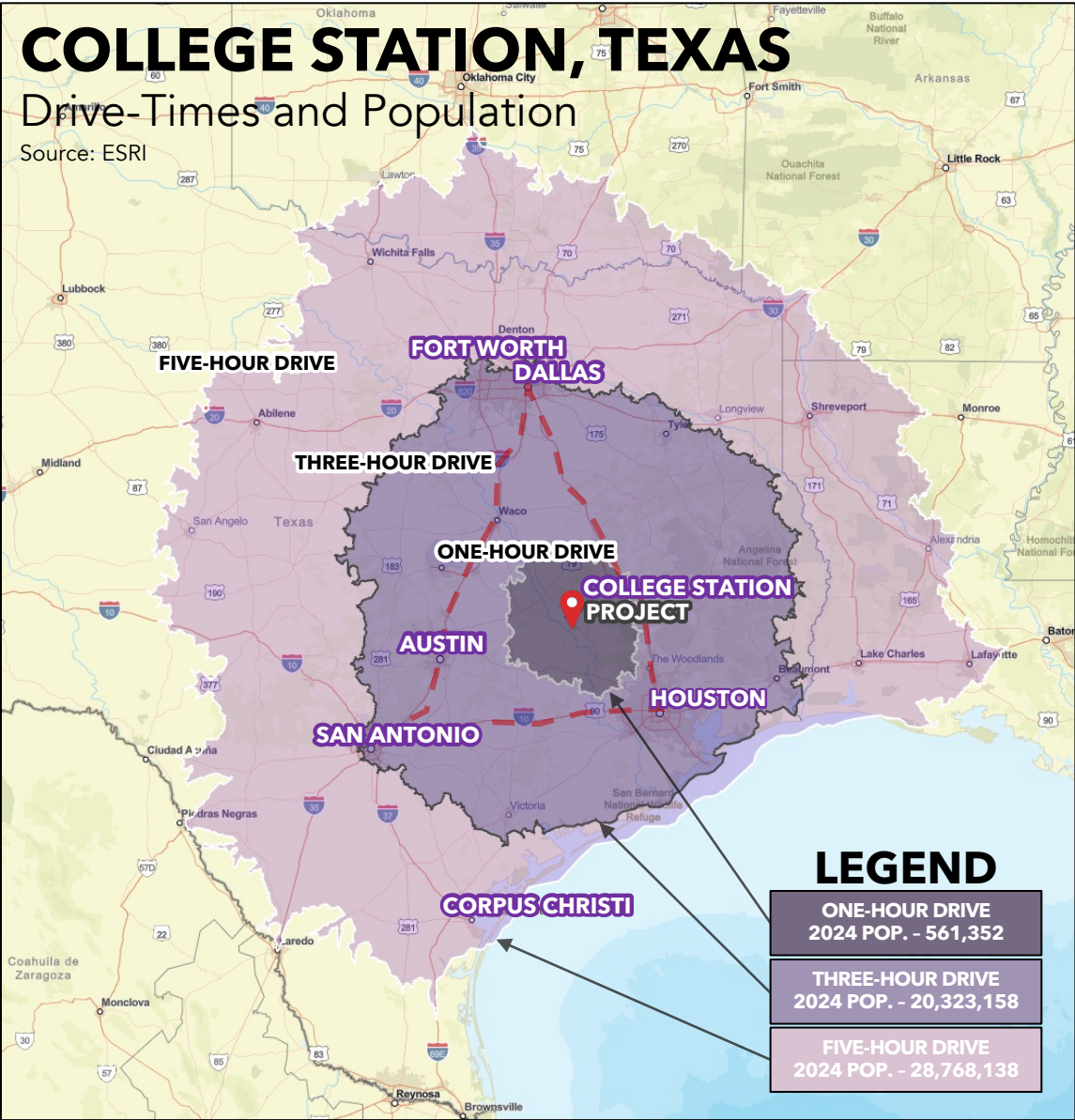
Market Findings Headlines

Robust Accessibility

More than 20.3 million people live within three hours of College Station, which captures large metropolitan areas such as Dallas-Fort Worth, Houston, Austin, and San Antonio. Known as the “Texas Triangle,” this region encompasses 66 percent of Texas’s population and generates 77 percent of its GDP. Over the next 40 years, the area is projected to grow by more than 65 percent.

This robust drive-in market creates substantial demand to support the development of a strategically positioned convention center in College Station.

Estimated Drive-Time Statistics from College Station (2024)			
	1-Hour	3-Hour	5-Hour
Population	561,352	20,323,158	28,768,138
Households	203,088	7,457,025	10,613,037
Median Household Income	\$69,790	\$78,405	\$77,882
Median Home Value	\$300,992	\$317,942	\$307,697
Median Age	33.4	36.2	36.7
Source: ESRI			



Texas A&M University

College Station is home to Texas A&M University's main campus, which boasts the second-largest student body in the nation.

- The Brazos Valley is a global leader in engineering, agriculture, and biomedical innovations due to the presence of the Texas A&M System, Texas A&M University, and several key state research and extension agencies
- More than 20 percent of the university's enrollment consists of graduate students
- By 2025, the university aims to enroll 25,000 students in its College of Engineering
- This area has the highest per capita concentration of material scientists and engineers among all 409 metropolitan statistical areas in the United States
- The 2,300-acre RELLIS campus located in Bryan, Texas, serves as a state-of-the-art hub for research, technology, and workforce development, fostering collaboration between the technology industry, educators, and students



593K+

Texas A&M University Alumni



72.6K

Fall 2024 Main Campus Enrollment



\$1.3B

Generated R&D Expenditures in 2023



#23rd

Rank in National Science Foundation's 2023 Survey

Implications

Economic, Demographic & Tourism Analysis

"Texas Triangle" Location

The Texas Triangle is among the fastest-growing economic regions in the United States, encompassing the state's five largest cities and home to 66 percent of Texas's population. By 2030, the area is projected to evolve into a single, giant metropolis.

Strong Highway Accessibility & Corporate Presence

Located within a three-hour drive of multiple major markets, Brazos County provides access to 53 of Texas's 54 Fortune 500 companies. This proximity to corporate headquarters, combined with key local employers, generates demand for conferences, trainings, and career fairs.

Innovation & Economic Growth

The presence of Texas A&M University and several key state research and extension agencies establishes Brazos County as a hub for innovation. The university's resources support the growth of new businesses, serving as a pipeline for the local events and meetings business.



Lost Business

The figure to the right outlines the reasons College Station lost business from 2022 to 2024.

- Of the 131 total lost events, 62 were due to facility gaps, unavailable dates, and other space-related reasons
- Lost events ranged from large conventions to youth sports tournaments
- Room night and economic impact calculations shown are based solely on the 62 events lost due to space constraints



62
Events Lost

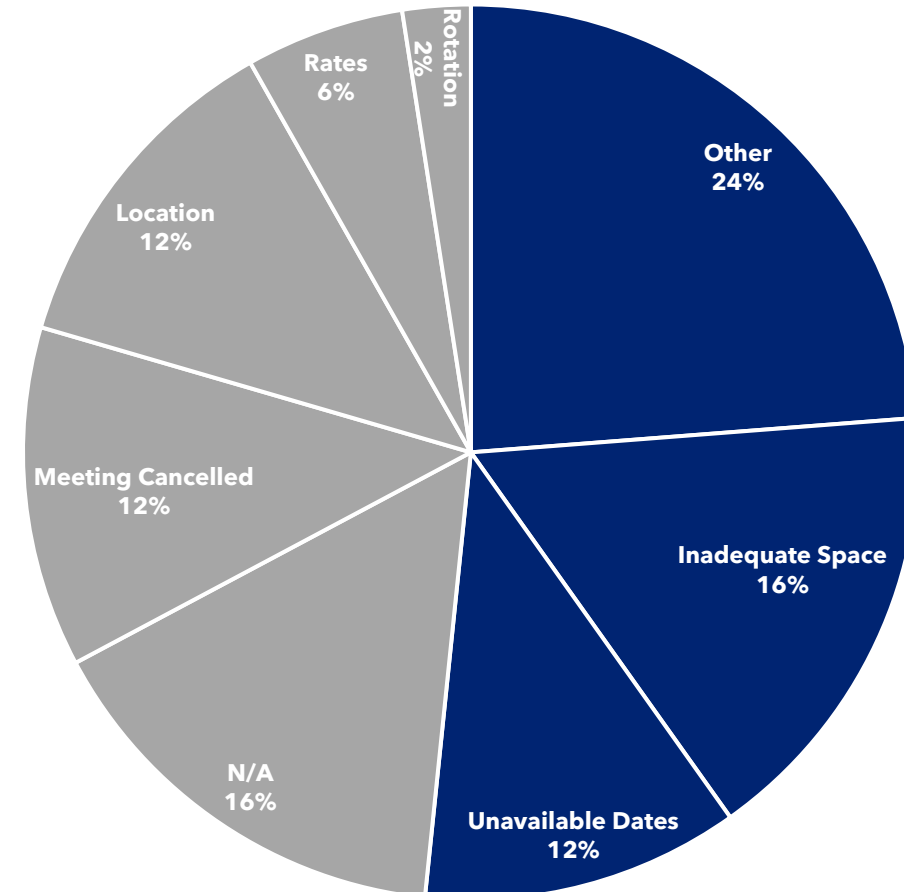


24.8K
Room Nights



\$13.2M
Economic Impact

2022-2024 Lost Business Report - Reasons



College Station Meetings Market

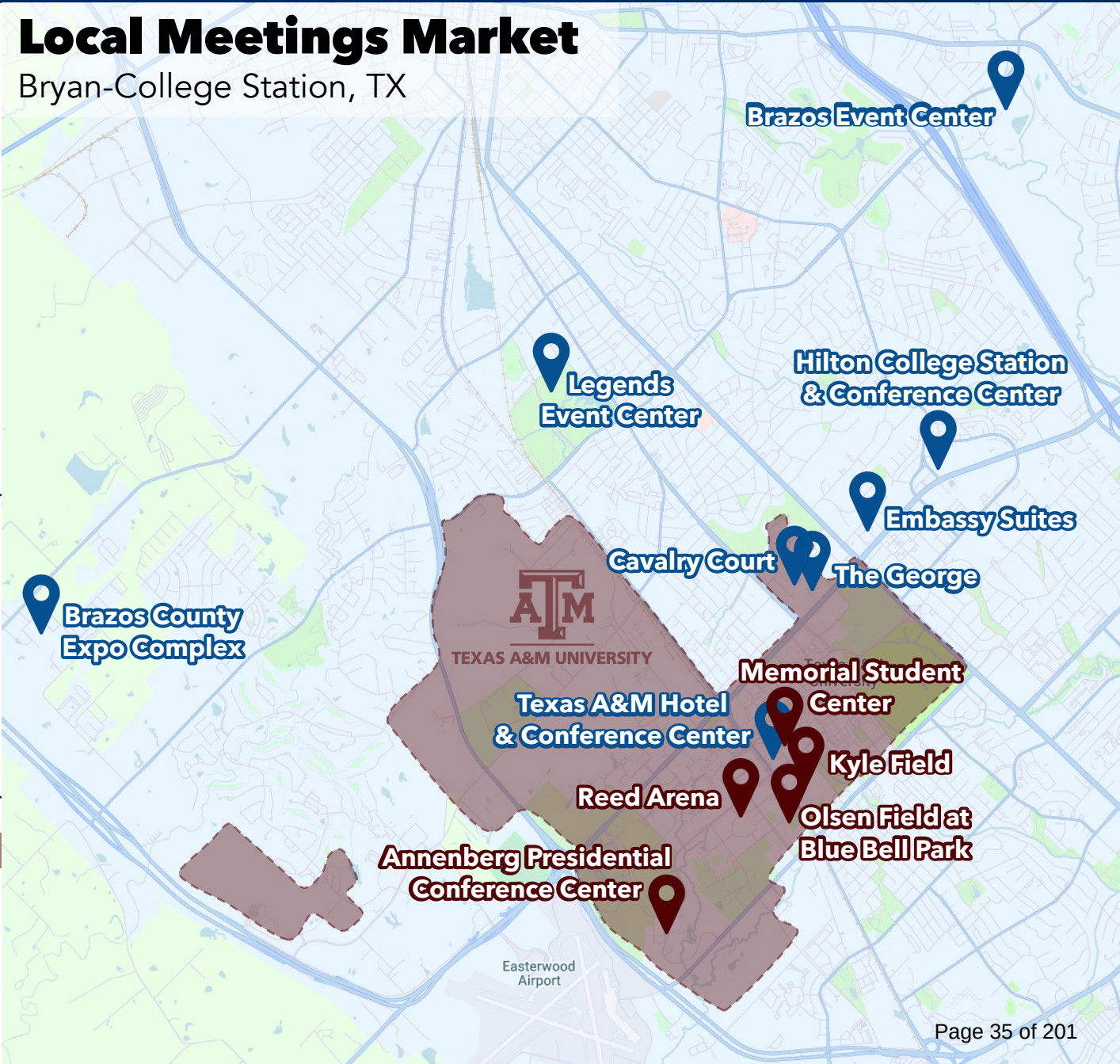
Bryan-College Station offers eight relevant meeting and event spaces with more than 5,000 square feet of function space. The Brazos County Expo is the only facility with exhibit space, while the Hilton Hotel & Conference Center is the only meeting venue that features sufficient function space along with a walkable hotel package. Texas A&M meetings facilities are not considered part of the competitive landscape due to their prioritization of university-affiliated events.

Facility	Location	Facility Type	Total Function Space (SF)
Brazos County Expo Center	Bryan, TX	Event Center	41,600
Legends Event Center	Bryan, TX	Sports Facility	41,500
Hilton College Station & Conference Center	College Station, TX	Conf. Center / Hotel	25,919
The Brazos Center	Bryan, TX	Event Center	20,468
Texas A&M Hotel and Conference Center	College Station, TX	Conf. Center / Hotel	20,453
Embassy Suites by Hilton College Station	College Station, TX	Hotel	7,296
Cavalry Court	College Station, TX	Hotel	6,270
The George	College Station, TX	Hotel	5,236

Average	21,093		
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TEXAS A&M FACILITIES

Kyle Field	College Station, TX	Football Stadium	87,913
Memorial Student Center	College Station, TX	Student Center	38,527
Reed Arena	College Station, TX	Basketball Arena	30,600
Annenberg Presidential Conference Center	College Station, TX	Conference Center	11,100
Olsen Field at Blue Bell Park	College Station, TX	Ball Park	5,478



Texas A&M University Meeting Facilities

Texas A&M University offers several of Brazos County's largest and highest-quality meeting facilities with extensive amenities. However, these venues are not considered part of the local competitive meeting supply due to their prioritization of student organizations. Meeting planners have reported challenges in working with the university, citing last-minute scheduling changes to accommodate university needs.

Texas A&M University's facilities include the following:

- Kyle Field
- Memorial Student Center
- Reed Arena
- Annenberg Presidential Conference Center
- Olsen Field at Blue Bell Park
- Texas A&M Hotel and Conference Center
 - Unlike other university-affiliated facilities, the Texas A&M Hotel and Conference Center operates as a for-profit commercial venture and is included in the competitive supply



Texas A&M University Meeting Facilities Cont.

In 2013, a 30-year Preferred Access Agreement was signed between Brazos County, Texas A&M University, College Station's CVB, and the City of College Station to secure preferred access to Texas A&M University facilities for promoting tourism and supporting the convention and hotel industry in Brazos County.

- As part of this, the CVB would receive preferred rates to facilitate group programming at university facilities.
- \$36 million in hotel tax funding was allocated to Texas A&M University for facility access, with \$22 million contributed by Brazos County and an estimated \$14 million from the City of College Station. All parties acknowledged that these funds would support the renovation of Kyle Field.
- Despite this agreement, third-party users remain a low priority for many of the university's facilities. **Stakeholders have reaffirmed this, citing challenges in securing event space due to scheduling conflicts with university organizations.**

Annenberg Presidential Conference Center's Order of Priority (example):

1. George Bush Presidential Library Foundation
2. Bush School of Government and Public Service (including Institutes)
3. George H.W. Bush Presidential Library and Museum and Education Department
4. Texas A&M University-recognized academic departments as predetermined by the Office of the Provost
5. Recognized student organizations of Texas A&M
6. Agencies within the Texas A&M University System
7. Affiliated Texas A&M organizations (e.g., the Association of Former Students, Texas A&M Development Foundation, and Texas A&M Research Foundation).
8. Non-university affiliates (approved by the director)

Competitive Regional Texas Meetings Market (50K – 200K SF)

The State of Texas offers a wide range of convention and conference facilities and ranks third in the nation for prime exhibit space. The following list outlines mid-sized meeting facilities with 50,000 to 200,000 square feet of function space in suburban-urban markets. These facilities primarily target local corporate business and rotating state associations.

Regional Competitive Environment - Convention Centers (sorted by total function space)							
Facility	Location	Miles from Project	Facility Type	Total Function Space	Number of Adjacent / Connected Hotels	Adjacent / Connected Hotel Rooms	Hotel Rooms / 1,000 SF of Exhibit Space
Loews Arlington Hotel & Convention Center	Arlington	188	Conv. Center / Hotel	191,504	2	1,188	27.5
Lone Star Convention Center & Expo Center	Conroe	66	Convention Center	141,700	–	–	0.0
American Bank Center Convention Center	Corpus Christi	237	Conv. Center	135,588	–	–	0.0
Richard M. Borchard Regional Fairgrounds	Robstown	239	Fairgrounds	102,651	–	–	0.0
El Paso / Judson F. Williams Convention Center	El Paso	665	Convention Center	94,900	–	–	10.4
Moody Gardens Hotel, Spa and Convention Center	Galveston	143	Conv. Center / Hotel	92,945	1	433	8.2
McAllen Convention Center	McAllen	371	Convention Center	87,272	–	–	10.2
Irving Convention Center at Las Colinas	Irving	192	Convention Center	85,459	–	–	12.9
Amarillo Civic Center	Amarillo	512	Civic Center	82,178	–	–	3.7
Waco Convention Center	Waco	90	Convention Center	80,309	1	195	14.9
Galveston Island Convention Center at The San Luis Resort	Galveston	142	Convention Center	69,800	–	–	16.8
Kalahari Resorts & Conventions - Austin	Round Rock, TX	92	Resort	71,796	1	975	–
Lubbock Memorial Civic Center	Lubbock	431	Civic Center	67,334	–	–	14.3
Marriott Dallas Allen Hotel & Convention Center	Allen	195	Conv. Center / Hotel	66,600	1	300	11.3
The Woodlands Waterway Marriott Hotel & Convention Center	The Woodlands	72	Conv. Center / Hotel	66,532	1	348	17.5
Hampton Inn & Suites Dallas-Mesquite	Mesquite	174	Conv. Center / Hotel	57,738	1	160	9.3
Wichita Falls Multi-Purpose Events Center	Wichita Falls	289	Event Center	57,270	–	–	5.3
Ford Arena	Beaumont	169	Arena	56,332	–	–	0.0
Embassy Suites Frisco Hotel & Convention Center	Frisco	204	Conf. Center / Hotel	60,338	1	330	0.0
Hilton DFW Lakes Executive Conference Center	Grapevine	202	Conf. Center / Hotel	53,558	1	397	0.0
The Woodlands Resort & Conference Center	The Woodlands	70	Conf. Center / Resort	52,679	1	402	0.0
Average				84,499	1	225	8.1
Source: Various Facilities, Smith Travel Research							

Why HQ Hotels Are Needed

Headquarters hotels are found next to many of the major convention centers across the country and development of these hotels has exploded over the past decade. This increase encourages the questions: What makes these hotels special, and why are they needed to have a strong convention and meetings destination? The following bullets outline the importance of headquarters hotels and why they are critical for any convention destination:

- Meeting planners and attendees want to have a **connected hotel where they can walk back and forth easily from their meeting to their hotel room.** Convention destinations that do not have a connected hotel lose significant business to other destinations with this capability.
- Groups will hold other events in the function space at the headquarters hotel or there can be simultaneous events occurring at one time.
- Room counts need to be high because it is important to have a large enough room block in the hotel to host a majority of the attendees. A **destination may lose out on a large event if another city has a larger headquarters hotel with a larger available room block.**
- These hotels are typically full-service because during non-convention days it is **important that the hotel can show self-reliance and generate its own meetings business.** This means that the hotel has ballroom and meeting room space, several dining options, and other amenities typically found in full-service properties such as a spa, fitness center, and pool.

Impact of HQ Hotel Development

Hunden recently conducted an exhaustive analysis of more than 12 convention markets that did or did not introduce a convention headquarters hotel to determine how rates, occupancies, RevPAR (a product of occupancy and ADR), and total hotel revenue changed.

Hunden conducted this analysis on not only the Primary competitive set of walkable hotels around the convention center, but also on a Secondary set of hotels that are lower quality, older, and/or farther away (up to three miles), to understand how compression from new business helps or hurts these properties.

The results are impressive and show positive impacts for both the Primary and Secondary sets of hotels, with even more pronounced benefits for the Secondary set. A hotel adjacent or connected to a convention center venue in College Station is imperative.

Performance of Primary & Secondary Hotel Sets

10 Years Before & After Introduction of a Convention Headquarters Hotel*

ADR - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	1.3%	3.5%	2.2%	22.4%
B - Secondary Set	1.3%	4.6%	3.3%	32.9%

Occupancy - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	0.6%	1.4%	0.8%	8.0%
B - Secondary Set	0.2%	1.6%	1.4%	14.1%

RevPAR - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	1.9%	5.1%	3.2%	31.8%
B - Secondary Set	1.5%	6.5%	5.0%	49.9%

Total Revenue - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	5.1%	9.0%	3.9%	39.0%
B - Secondary Set	7.0%	9.7%	2.7%	27.5%

Source: STR, Hunden Partners

Regional Entertainment Market Overview

Pollstar compiled data between January 2022 and December 2022 to publish their Concert Market Rankings report. College Station is uniquely located between major concert markets. While difficult to attract headlining shows, College Station can serve as a midway point between the major markets and host mid-sized acts within a new event facility.

- The Dallas-Fort Worth market ranked **8th overall** in 2022 with a reported \$206.8 million in ticket sales (2.25 million tickets sold).
- The Houston market ranked **15th overall** in reported gross dollars of ticket sales. Over the period, there was a reported \$138.2 million in ticket sales (1.37 million tickets sold).
- The Austin market ranked **22nd overall** in 2022 with a reported \$91.5 million in ticket sales (785,333 tickets sold).

A conversation with Live Nation highlighted College Station's potential role in the regional routing landscape, particularly from Houston. A multipurpose facility with a 2,000- to 5,000-capacity could attract college-targeted acts. The region's entertainment and concert market is expanding rapidly.



College Station

Entertainment Venues: Local Market Overview

Hunden identified relevant and competitive entertainment venues with the potential to host ticketed events.

Bryan-College Station has a limited supply of high-quality entertainment venues capable of hosting large events or concerts outside of Texas A&M University’s facilities. Historically, Kyle Field and Reed Arena have attracted major acts. From Elvis to George Strait, these venues serve as a tour stop for artists performing in other major Texas markets. Notably, Rudder Auditorium, a smaller entertainment facility, does not currently route regular entertainment acts that could drive interest from Texas A&M students. A gap exists in the entertainment market for a well-programmed, mid-sized facility that can drive acts targeting students.

Local Music & Entertainment Venue Supply							
Venue	Concert Capacity	Venue Type	Location	Estimated 2024 Events	Average Attendance	Average Occupancy %	Average Ticket Price
Kyle Field	110,905	Stadium	College Station, TX	1	110,905	100%	\$231.65
Reed Arena	13,000	Arena	College Station, TX	0	4,161	63%	\$30.79
Wolf Pen Creek Amphitheater	7,500	Auditorium/Theater	College Station, TX	1	738	82%	\$29.46
Rudder Auditorium	2,500	Auditorium/Theater	College Station, TX	2	1,758	68%	\$40.11
Central Baptist Church	1,400	Auditorium/Theater	College Station, TX	0	1,697	61%	\$25.98
The Tap	600	Club	College Station, TX	3	498	84%	\$16.78
Grand Stafford Theater	400	Auditorium/Theater	Bryan, TX	0	281	75%	\$12.68
Palace Theater	400	Auditorium/Theater	Bryan, TX	–	–	–	–
Average	17,088			1	17,148	76%	\$55.35

Source: Pollstar

* Some venues do not report all events. True event data may be skewed or underestimated.



Implications

Convention Center, Meetings & Entertainment Market Analysis

State Association Demand

Rotating state associations have shown interest in College Station and would consider the city as a host destination if a new convention center were developed. However, College Station has not fully leveraged this demand, as only 37 association events were reported in the market between 2022 and 2024.

Limited Supply

College Station lacks high-quality meeting space necessary to attract regional events. Inadequate hotel and meeting space was the most common reason for lost business between 2022 and 2024. Texas A&M University's facilities prioritize university-affiliated organizations and are generally not considered accessible by meeting planners.

Flexible Space

A new convention center should prioritize ballroom space and breakout rooms to attract local and regional meetings. However, incorporating a versatile exhibit hall would allow the venue to host sports tournaments and entertainment events, further expanding its market reach.



Competitive Hotel Market Overview

Hunden's key takeaways from the competitive hotel set are as follows:

- The competitive set has experienced steady growth in both demand and supply since the pandemic, with occupancy and Average Daily Rate (ADR) surpassing 2019 levels
- The market has more than doubled in supply since 2016, primarily due to the addition of five properties in 2017 and 2018, though demand has yet to fully absorb this increased inventory
- Over the past two years, 229 rooms have been added to the market, including the 160-room upscale Drury Plaza Hotel, which is expected to open in February 2025

Historical Supply, Demand, Occupancy, ADR, and RevPar for Competitive Hotels College Station, TX Competitive Set										
Year	Annual Avg. Available Rooms	% Change	Room Nights Sold	% Change	% Occupancy	% Change	ADR	% Change	RevPar	% Change
2016	939	–	231,745	–	67.6	–	\$134.06	–	\$90.61	–
2017	1,327	41.2%	285,777	23.3%	59.0	-12.7%	\$131.64	-1.8%	\$77.69	-14.3%
2018	1,840	38.7%	375,102	31.3%	55.9	-5.4%	\$134.58	2.2%	\$75.17	-3.2%
2019	1,985	7.9%	412,924	10.1%	57.0	2.0%	\$130.24	-3.2%	\$74.23	-1.3%
2020	1,804	-9.1%	230,423	-44.2%	35.0	-38.6%	\$108.79	-16.5%	\$38.08	-48.7%
2021	1,818	0.8%	381,109	65.4%	57.4	64.1%	\$135.91	24.9%	\$78.07	105.0%
2022	2,062	13.4%	451,461	18.5%	60.0	4.4%	\$153.10	12.6%	\$91.84	17.6%
2023	2,084	1.1%	458,225	1.5%	60.2	0.4%	\$163.38	6.7%	\$98.41	7.2%
2024	2,055	-1.4%	480,768	4.9%	64.1	6.4%	\$177.95	8.9%	\$114.04	15.9%
CAGR (2016-2024)		14.9%	13.4%		-0.6%		4.1%		3.2%	

Source: Smith Travel Research, Hunden Partners

2024 Key Market Indicators (Competitive Set)

Occupancy

64.1%

ADR

\$177.95

YOY ADR Growth

8.9%

RevPAR

\$114.04

Development Pipeline (10-Mile Radius)

Current Supply

6,268 Rooms

Delivered Past 2 Yrs

229 Rooms

Delivered Next 2 Yrs

0 Rooms

Proposed Next 2 Yrs

272 Rooms

Heat Chart

The adjacent tables detail the performance of the local competitive set by month and day of week from January 2024 through December 2024, providing insight into seasonality and daily performance.

As shown, both occupancy and rates peak on weekends, particularly in late spring and fall. This trend is likely driven by Texas A&M University’s academic and athletic calendar, with graduations occurring in May and the NCAA football season taking place in the fall.

Conversely, Sundays through Tuesdays consistently recorded the lowest ADR and weakest occupancy levels, reflecting a market driven more by leisure than corporate and association business.

ADR by Day of Week by Month - January 2024 - December 2024								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jan - 24	\$124	\$128	\$134	\$132	\$132	\$147	\$147	\$136
Feb - 24	\$131	\$135	\$137	\$149	\$147	\$176	\$172	\$153
Mar - 24	\$135	\$141	\$141	\$140	\$145	\$165	\$157	\$148
Apr - 24	\$136	\$135	\$138	\$144	\$163	\$250	\$248	\$181
May - 24	\$135	\$135	\$143	\$161	\$203	\$220	\$198	\$179
Jun - 24	\$136	\$142	\$151	\$149	\$161	\$204	\$256	\$176
Jul - 24	\$143	\$147	\$161	\$164	\$168	\$174	\$169	\$162
Aug - 24	\$134	\$135	\$138	\$148	\$158	\$291	\$299	\$206
Sep - 24	\$133	\$134	\$141	\$149	\$149	\$229	\$242	\$169
Oct - 24	\$145	\$157	\$151	\$149	\$156	\$361	\$365	\$216
Nov - 24	\$132	\$134	\$138	\$141	\$151	\$343	\$360	\$236
Dec - 24	\$129	\$130	\$136	\$151	\$175	\$167	\$161	\$152
Average	\$134	\$138	\$143	\$148	\$159	\$227	\$231	

Sources: Smith Travel Research

Occupancy Percent by Day of Week by Month - January 2024 - December 2024								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jan - 24	35.1%	40.2%	51.8%	56.5%	54.1%	67.8%	70.3%	53.3%
Feb - 24	41.5%	58.9%	65.8%	68.7%	63.4%	86.6%	82.4%	66.7%
Mar - 24	41.0%	65.8%	72.3%	69.9%	62.4%	74.4%	72.2%	65.1%
Apr - 24	48.3%	51.9%	66.5%	67.5%	71.0%	92.9%	90.2%	69.1%
May - 24	40.4%	48.8%	65.2%	73.7%	73.6%	81.5%	84.9%	67.8%
Jun - 24	46.0%	71.8%	75.3%	79.3%	84.8%	79.8%	79.2%	73.0%
Jul - 24	47.7%	64.8%	73.8%	77.0%	78.9%	74.0%	70.3%	69.7%
Aug - 24	40.3%	56.1%	57.1%	58.4%	60.3%	78.1%	80.8%	62.7%
Sep - 24	31.7%	48.1%	66.4%	76.2%	65.5%	61.2%	62.4%	57.5%
Oct - 24	53.3%	74.7%	72.5%	70.4%	71.5%	85.8%	84.7%	73.1%
Nov - 24	41.6%	50.6%	60.1%	62.6%	58.4%	87.6%	93.3%	66.6%
Dec - 24	27.4%	38.2%	41.3%	48.8%	53.7%	57.4%	58.1%	45.4%
Average	40.8%	55.1%	63.7%	67.6%	66.5%	77.4%	77.7%	

Sources: Smith Travel Research

Implications

Hotel Market Analysis

Supply Growth & Demand Lag

The College Station competitive hotel market has expanded significantly over the past decade, with available supply doubling since 2016. As a result, the market has not yet fully absorbed the additional rooms, and occupancy levels remain below 2016 levels.

Seasonality Trends

As the home of one of the largest universities in the country, College Station's hospitality performance is heavily influenced by Texas A&M University's academic and athletic calendar. Both occupancy and rates peak on weekends during the NCAA football season and the university's graduation ceremonies.

Limited Group Business

College Station's hotel market offers limited meeting space to attract group business. As a result, occupancy and rates are weakest on weekdays, creating a missed opportunity for the city to capture additional overnight stays and event-driven spending.



Flexible Music & Entertainment Venues for Inspiration



Mission Ballroom

Year Opened: 2019

Function Space: 60,000 SF (9,000 SF Ballroom)

Arena Capacity: 3,950

Cost: \$38 Million

Funding Tools: Private



Stride Bank Center

Year Opened: 2013

Function Space: 51,500 SF (20,000 SF Event Center)

Arena Capacity: 5,000

Cost: \$24 Million

Funding Tools: The project was funded through a one-percent sales tax increase approved by voters, with municipal bonds issued against the revenue. Later, Stride Bank's naming rights provided private funding for operations and improvements.

Convention Center Case Studies Overview



Year Opened: 1972

Function Space: 80,309 SF

Cost: \$17.5 Million (2012 Renovations)

Funding Tools: The City of Waco approved a bond package totaling \$63 million in 2007, with \$17.5 million allocated for the extensive renovations of the convention center.



Year Opened: 2021

Function Space: 32,903 SF

Cost: \$2.5 Million (2017 Renovations)

Funding Tools: The City of Plano financed the most recent facility renovation through municipal funding.



Year Opened: 2002

Function Space: 98,530 SF

Cost: \$46 Million

Funding Tools: The City of Overland Park issued \$33 million in bonds to refinance debt tied to the construction of the Overland Park Convention Center.



Year Opened: 2005

Function Space: 56,849 SF

Cost: \$36 Million

Funding Tools: Funded through TIF and a five-percent county-wide hotel tax approved by St. Charles County Convention and Sports Facilities Authority.

Case Study & Private Management Feedback Themes

The following themes capture the key focus areas from stakeholder discussions with case study facilities and private management representatives.

During the planning stages, it is critical to align on the true purpose of the event facility and the primary group types it will serve (e.g., local organizations vs. regional and statewide groups)

A connected or adjacent full-service hotel and walkable mixed-use district is crucial for attracting high-value groups and association events. The impact of compression should not be overlooked

Consider private management for operation efficiency and a dedicated maintenance reserve fund for long-term sustainability

Build a flexible, tech-ready venue with ample networking spaces (indoor & outdoor) to cater to evolving event needs

New build design should include adequate pre-function areas, flexible exhibit/ballroom space, high ceilings, and modern tech infrastructure for multipurpose use

Target corporate and association business by ensuring a flexible facility. A connected hotel will be essential for attracting conventions

Implications

Case Studies & Best Practices Analysis

HQ Hotels Boost Competitiveness

Developing an HQ hotel has significantly improved convention centers' ability to attract regional and national events, expanding their market reach beyond local business.

Walkability & Activation Drives Success

A lack of walkable hotels is a key competitive disadvantage. Adjacent retail, dining, and entertainment enhance destination appeal for meetings and events.

Private Management Ensures Smooth Operations

While not all successful convention centers are privately operated, leading private firms drive revenue, align with municipal goals, and maximize economic impact.



Preliminary Conclusions

Flexibility: College Station lacks high-quality, flexible space to accommodate a variety of events. A versatile venue would ensure steady activity year-round, capturing not only conventions and conferences but also sporting and entertainment events, which are currently underserved and in demand.

Need for Lodging: A successful convention facility requires a connected hotel. A walkable hotel package – including full-service, select-service, and limited-service properties – is essential to attract overnight events.

Affordability & Size: A suburban facility offers meeting planners a more affordable option than large, full-service hotels. It also provides an appropriately sized space for small to mid-sized functions, as compared to large downtown convention centers or major suburban expo facilities.

Competitive Supply: The proposed development will have to differentiate itself from the already established destinations in downtown Houston and in the suburbs that have been able to capture corporate and convention demand through the attractiveness of walkability and support amenities (shopping, dining, hotels). Complementary nearby assets, such as restaurants and entertainment, are recommended to ensure the development has a destination appeal outside of the venue itself.

Market Contingencies: Better integration with Texas A&M's event facilities could help College Station capture more association, group business, and entertainment acts, potentially reducing the need for a fully dedicated convention center.

Recommendation - Scenario One

Convention Center Program

	Feature	Capacity	Estimated Maximum Capacity
	Exhibit Hall/ Flexible Event Floor	45,000 SF 3 divisible spaces	3,000
	Ballroom Junior Ballroom	20,000 SF (8 divisible spaces, incl. in Exhibit Hall) 10,000 SF (4 divisible spaces)	1,333 667
	Meeting Rooms	15,000 SF 15 divisible spaces	Variable
	Back of House, Front of House, Circulation	77,500	
	Parking	~1,000 Spaces	
			70,000 SF Total (Sellable)
			147,000 SF Total (Full CC)
			Minimum Land w/ Structured Parking: 7 Acres*
			Minimum Land w/ Surface Parking: 15 Acres*
			*acreage includes hotel

Hotel Program

	Hotel	275 keys	--
	Ballroom Junior Ballroom	12,000 SF (3 divisible spaces) 5,000 SF (3 divisible spaces)	800 333
	Meeting Rooms	4,000 SF 4 divisible spaces	Variable
			24,000 SF Total

Recommendation - Scenario Two

Convention Center Program

	Feature	Capacity	Estimated Maximum Capacity
	Exhibit Hall/ Flexible Event Floor	65,000 SF 3 divisible spaces	4,667
	Ballroom Junior Ballroom	30,000 SF (12 divisible spaces, incl. in Exhibit Hall) 12,000 SF (6 divisible spaces)	2,000 1,333
	Meeting Rooms	24,000 SF 15 divisible spaces	Variable
	Back of House, Front of House, Circulation	111,100	
	Parking	~1,000 Spaces	
			212,100 SF Total (Full CC) Minimum Land w/ Structured Parking: 9.5 Acres* Minimum Land w/ Surface Parking: 20 Acres* *acreage includes hotel

Hotel Program

	Hotel	400 keys	--
	Ballroom Junior Ballroom	15,000 SF (3 divisible spaces) 8,000 SF (3 divisible spaces)	1,000 533
	Meeting Rooms	7,000 SF 4 divisible spaces	Variable

How College Station Would Stack Up Regionally.

Hunden's two recommended scenarios will enhance College Station's ability to compete with regional facilities in terms of size and connected hotel supply. Scenario one would make College Station regionally competitive, with slightly less function, exhibit, and meeting space than its peers but a larger ballroom. **Scenario two would surpass the competitive set in all studied categories, including connected hotel footprint and convention center program.**

Regional Competitive Environment - Convention Centers (sorted by total function space)											
Facility	Location	Total Function Space	Exhibit Space	Ballroom Space	Largest Ballroom	Meeting Space	Meeting Rooms	Avg. Meeting Room SF	Number of Adjacent / Connected Hotels	Adjacent / Connected Hotel Rooms	Hotel Rooms / 1,000 SF of Exhibit Space
Loews Arlington Hotel & Convention Center	Arlington	191,504	43,269	98,887	51,224	49,348	44	1,122	2	1,188	27.5
Lone Star Convention Center & Expo Center	Conroe	141,700	111,000	22,300	22,300	8,400	7	1,200	—	—	0.0
American Bank Center Convention Center	Corpus Christi	135,588	76,500	43,790	25,366	15,298	14	1,093	—	—	0.0
Richard M. Borchard Regional Fairgrounds	Robstown	102,651	80,000	20,000	20,000	2,651	4	663	—	—	0.0
El Paso / Judson F. Williams Convention Center	El Paso	94,900	80,000	—	—	14,900	5	2,980	—	—	10.4
Moody Gardens Hotel, Spa and Convention Center	Galveston	92,945	52,780	15,180	15,180	24,985	22	1,136	1	433	8.2
McAllen Convention Center	McAllen	87,272	61,482	10,659	10,659	15,131	12	1,261	—	—	10.2
Irving Convention Center at Las Colinas	Irving	85,459	48,576	26,104	19,264	10,779	12	898	—	—	12.9
Amarillo Civic Center	Amarillo	82,178	61,333	20,845	20,845	—	—	—	—	—	3.7
Waco Convention Center	Waco	80,309	47,976	13,818	13,818	18,515	13	1,424	1	195	14.9
Galveston Island Convention Center at The San Luis Resort	Galveston	69,800	43,100	15,000	15,000	11,700	11	1,064	—	—	16.8
Kalahari Resorts & Conventions - Austin	Round Rock, TX	71,796	—	61,936	40,040	9,860	6	1,643	1	975	—
Lubbock Memorial Civic Center	Lubbock	67,334	40,000	14,105	14,105	13,229	14	945	—	—	14.3
Mariott Dallas Allen Hotel & Convention Center	Allen	66,600	40,000	12,000	12,000	14,600	15	973	1	300	11.3
The Woodlands Waterway Marriott Hotel & Convention Center	The Woodlands	66,532	37,180	22,050	18,000	7,302	14	522	1	348	17.5
Hampton Inn & Suites Dallas-Mesquite	Mesquite	57,738	35,250	18,000	18,000	4,488	9	499	1	160	9.3
Wichita Falls Multi-Purpose Events Center	Wichita Falls	57,270	38,088	—	—	19,182	10	1,918	—	—	5.3
Ford Arena	Beaumont	56,332	48,600	—	—	7,732	8	967	—	—	0.0
Embassy Suites Frisco Hotel & Convention Center	Frisco	60,338	—	42,154	42,154	18,184	27	673	1	330	0.0
Hilton DFW Lakes Executive Conference Center	Grapevine	53,558	—	23,780	14,400	29,778	31	961	1	397	0.0
The Woodlands Resort & Conference Center	The Woodlands	52,679	—	26,690	13,430	25,989	23	1,130	1	402	0.0
Average		84,499	52,507	24,157	18,371	15,336	14	1,154	1	225	8.1
Scenario One Recommendation	College Station, TX	70,000	45,000	30,000	20,000	15,000	15	1,000	1	275	6.1
Difference from Average	—	(14,499)	(7,507)	5,843	1,629	(336)	1	(154)	0	50	(2)
Scenario Two Recommendation	College Station, TX	101,000	65,000	42,000	30,000	24,000	15	1,600	1	400	6.2
Difference from Average	—	16,501	12,493	17,843	11,629	8,664	1	446	0	175	(2)

Source: Various Facilities, Smith Travel Research

Next Steps

February 27 - In-Person City Council Meeting

Determination to Proceed with Phase II

TVS site assessment, layouts, and cost estimates

Demand & Financial Projections/Economic & Fiscal Impacts



01

Economic, Demographic & Tourism Analysis

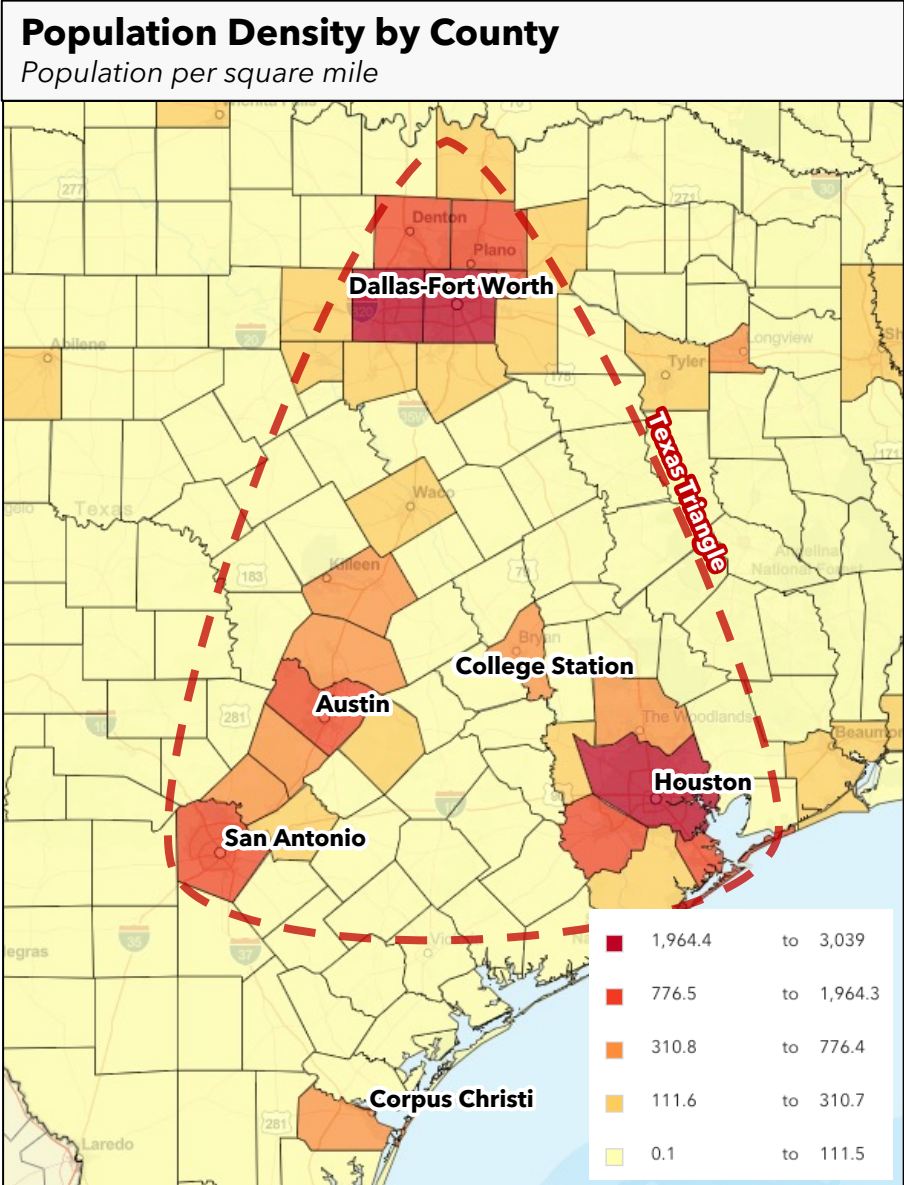
Population

College Station is located in the “Texas Triangle,” one of the most economically vibrant and fastest-growing regions in the nation.

During the period between 2010 to 2024, this region experienced significant population increases at the city, county, and state levels. The significant growth in College Station is primarily attributed to large increases in student enrollment at Texas A&M University in recent years. While population growth at the city level is projected to slow, it is expected to remain positive through 2029.

Population and Growth Rates					
	Population				Percent Change
	2010	2020	2024	2029 Projected	2010 - 2024
United States	308,745,538	331,449,281	338,440,954	344,873,411	9.6%
Texas	25,145,558	29,145,505	30,857,478	32,581,174	22.7%
College Station-Bryan, TX MSA	228,660	268,248	283,518	298,151	24.0%
Brazos County	194,851	233,849	247,878	261,606	27.2%
College Station	94,228	120,511	126,637	132,359	34.4%
Bryan	76,410	84,006	89,157	94,481	16.7%
Kurten	398	395	436	476	9.5%
Wixon Valley	254	228	257	273	1.2%

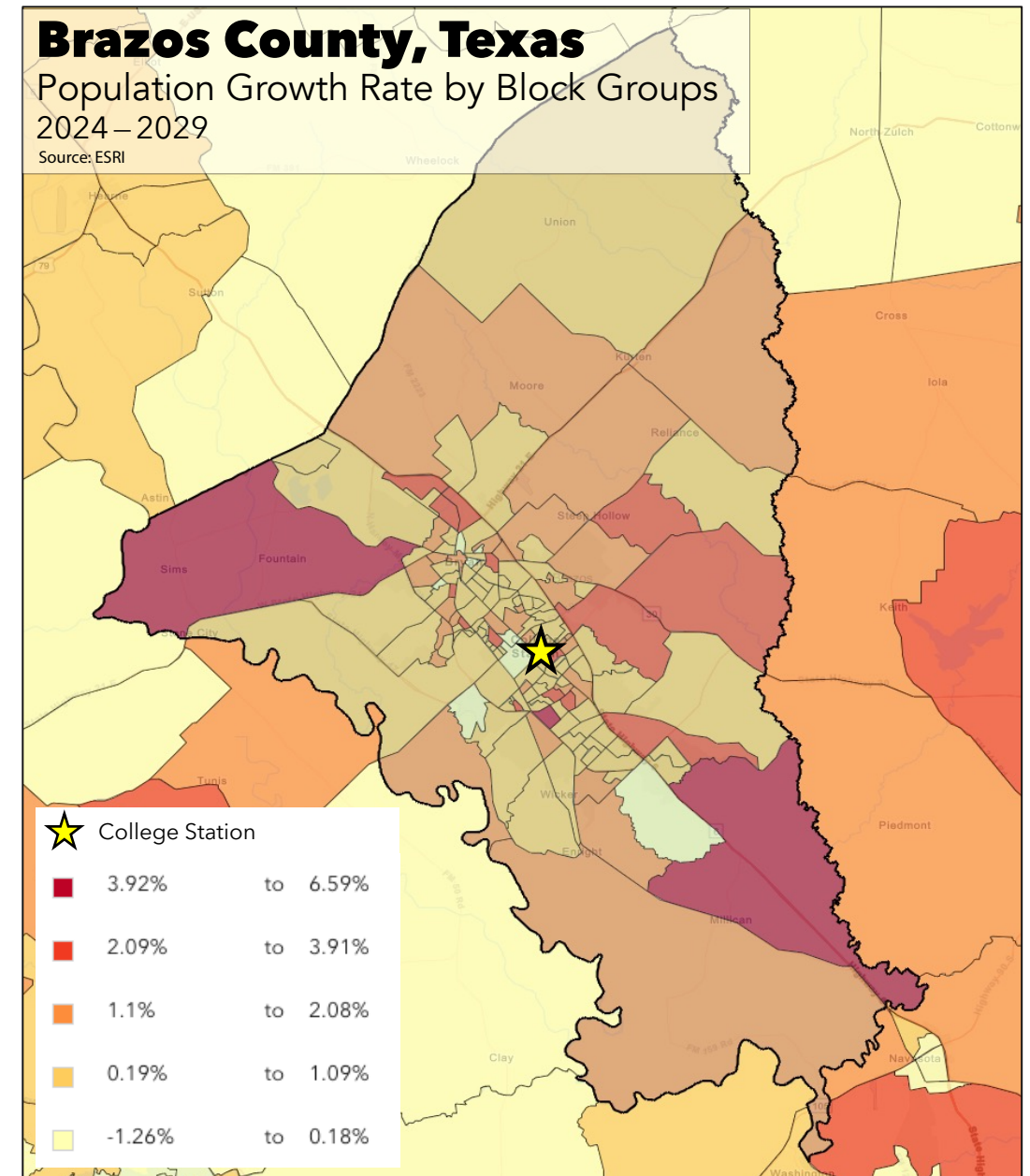
Source: U.S. Census Bureau



Population Growth Trend

The adjacent map details the projected annual growth rate in Brazos County and the surrounding region from 2024 to 2029, based on block group data. Key takeaways include:

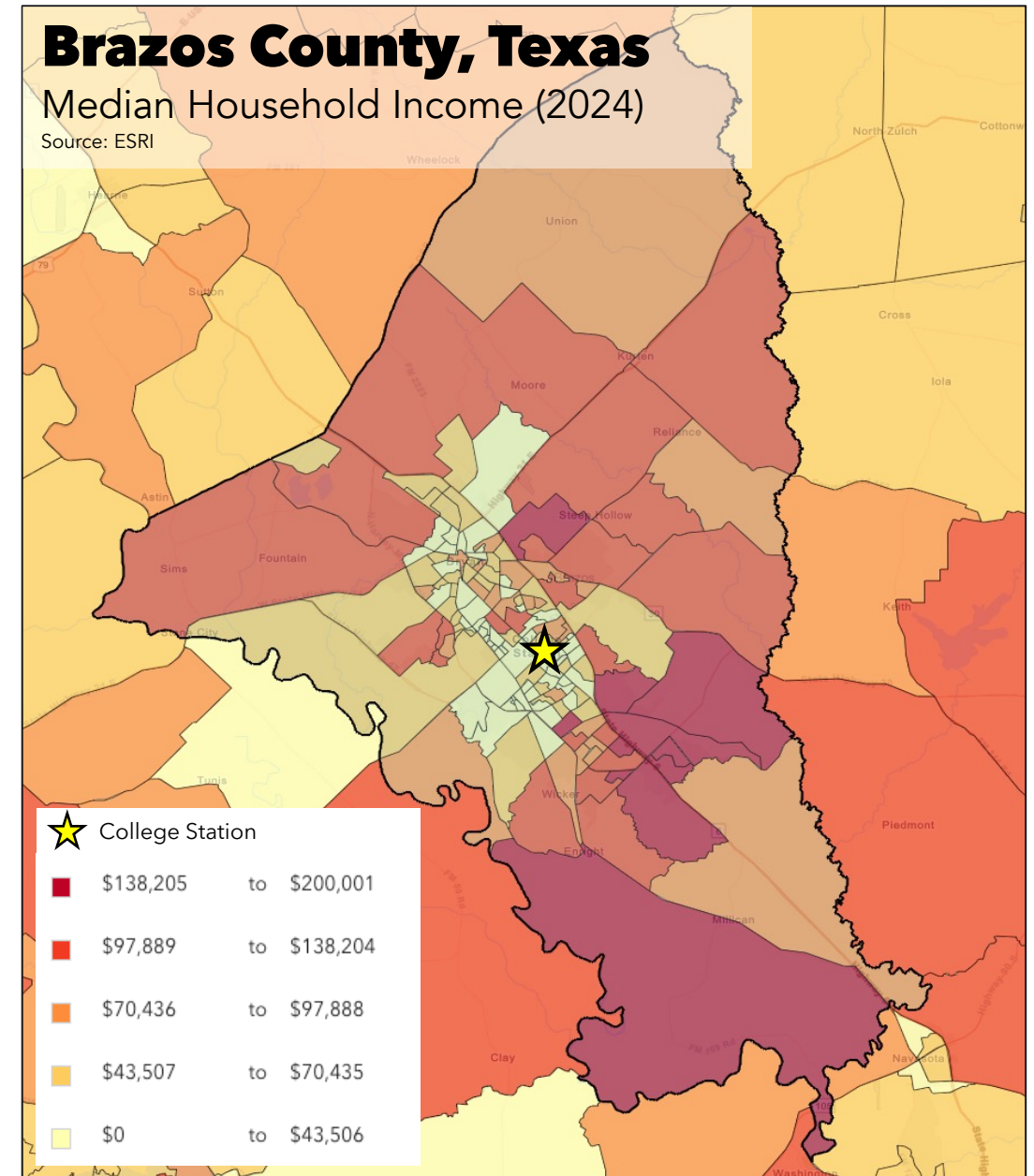
- Growth corridors are fairly spread across the county, with the highest projected growth in College Station's Steeplechase neighborhood at 6.6 percent.
- Additional areas with notable growth include the western and southern regions of Brazos County. However, the overall projected growth for the county remains minimal.
- Texas A&M University reported a record enrollment of 72,560 for fall 2024, a two-percent increase over the previous year. However, the university's 2024 Capacity Study Report recommended pausing undergraduate enrollment growth for five years to address infrastructure and service gaps, shown by the negative projected population growth around the campus.



Median Household Income

The adjacent map shows the median household income throughout Brazos County and the regional area in 2024 by block groups. The following are key takeaways:

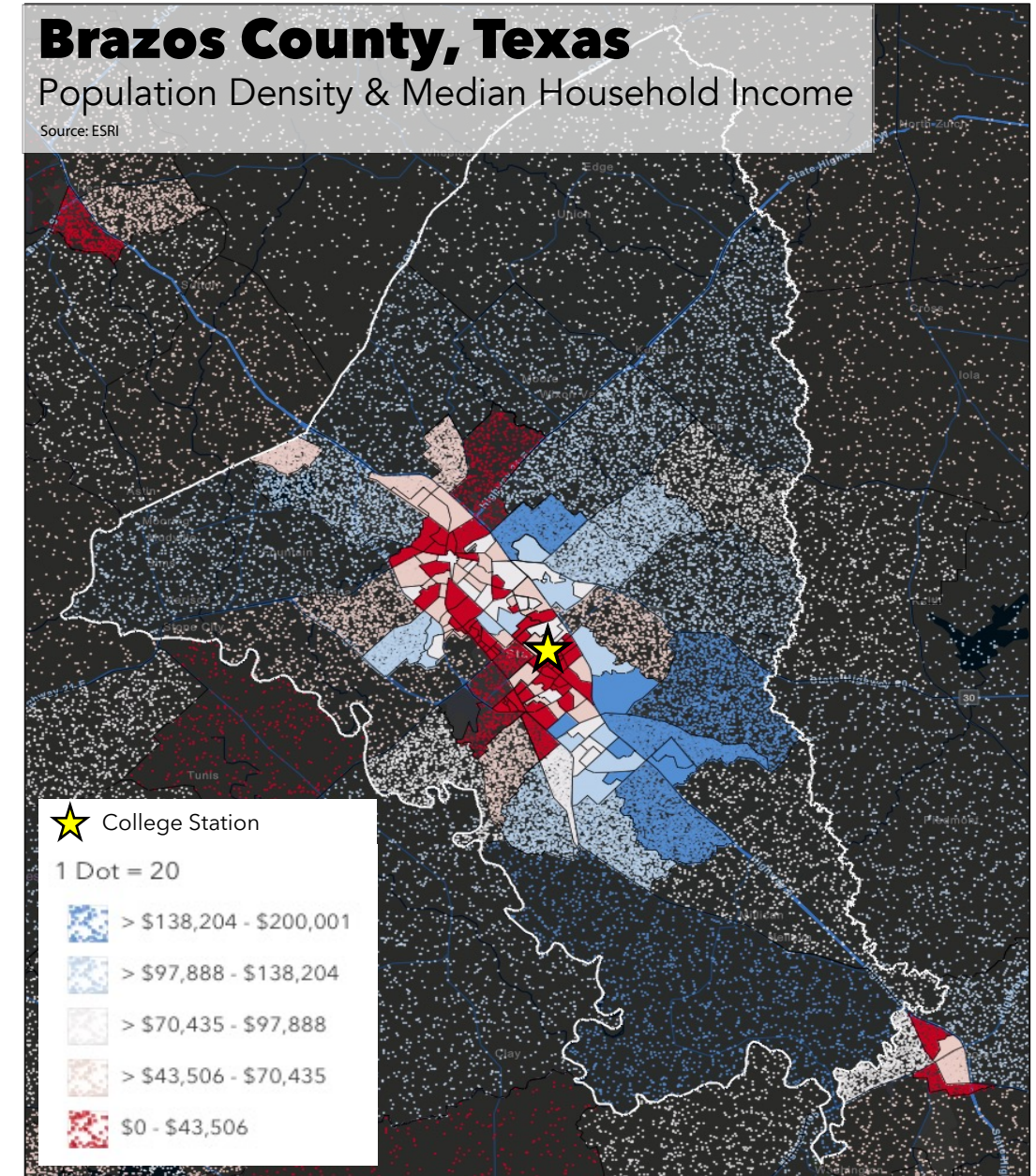
- Brazos County has an average median household income of \$62,900, lower than the State of Texas's average of \$77,169.
- Downtown College Station reports some of the lowest median household income levels in the county, primarily due to the large undergraduate student population at Texas A&M University.
- The most affluent area in the county are the southeast neighborhoods of College Station, with a median household income of up to \$200,000. This is likely a result of the presence of highly educated faculty, researchers, and retired alumni returning to the area.



Population Density & Median Household Income Map

The adjacent map is both a population density and median household income dot map throughout Brazos County and the regional area in 2024. The following are key takeaways:

- Texas A&M University's main campus, located in College Station, likely explains the area's high population density and comparatively lower household incomes.
- Although the populations in South College Station are not as dense as downtown, residents of these neighborhoods boast high household incomes of more than \$100,000. This area often houses affluent individuals, including university employees, researchers, and retired alumni.
- The county's population density gets noticeably lower while household income levels increase as it moves further away from Downtown College Station and Bryan. This pattern suggests a higher prevalence of families with children and single-family homes in these areas.



Income and Housing

The following table provides data on local, regional, and national housing and income characteristics.

Compared to the County and State, College Station has lower median household income, homeownership rate, average household size, and median age—characteristics commonly associated with an undergraduate student population. The City has a higher median household value than that of the county and state, which is primarily due to limited land availability and increasing material costs.

Income and Housing Data (2024)				
Category	United States	Texas	Brazos County	College Station
Median Household Income	\$79,068	\$77,169	\$62,900	\$54,347
Homeownership Rate	57.9%	56.5%	39.0%	28.9%
Median Home Value	\$355,577	\$297,822	\$293,429	\$318,122
Average Household Size	2.53	2.70	2.48	2.41
Median Age	39.3	36.3	27.0	23.8
Persons Below Poverty Level (2022)	11.1%	13.7%	22.2%	28.6%
Employee Population	166,125,745	15,048,852	116,174	57,589
Source: ESRI, U.S. Census Bureau				

Accessibility

Highway Access

The Project's central position within the "Texas Triangle" offers convenient access to one of the nation's highest concentrations of corporate headquarters, adding to the Project's potential user base. It is accessible via TX-6 and Route 190, which connects to TX-249 as well as Interstates 10, 35, and 45, providing transportation links to Texas's largest metropolitan areas.

Air Access

The Project is served by Easterwood Regional Airport in College Station, which offers nonstop flights to Dallas/Fort Worth (DFW) through American Airlines. The closest international airports are George Bush Intercontinental Airport (IAH), located 88 miles away, and Austin-Bergstrom International Airport (AUS), 101 miles away. The lack of major airports near the Project may deter some meeting planners and poses a challenge for attracting larger conventions.

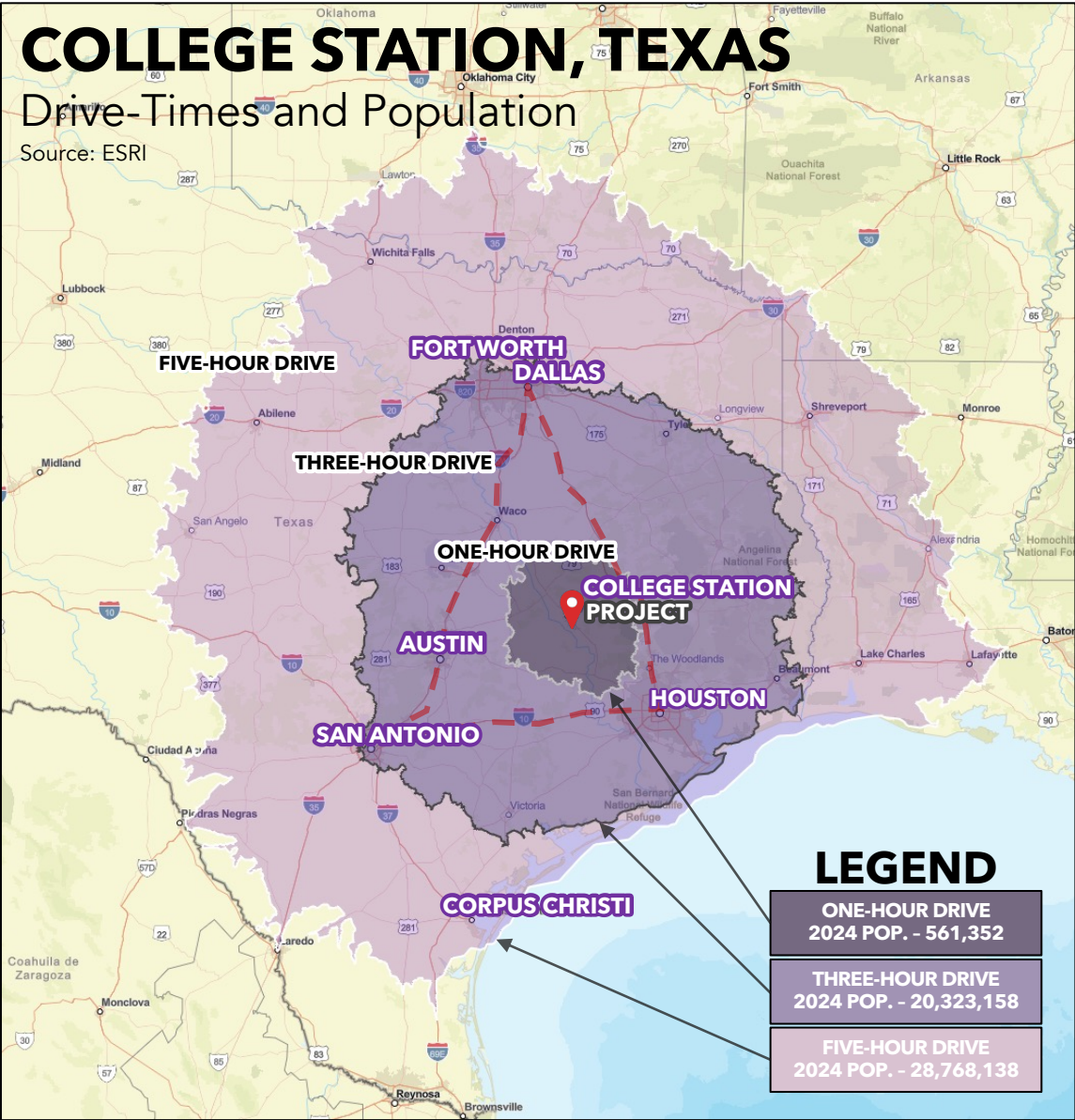


Drive-Time Statistics

More than 20.3 million people live within three hours of College Station, which captures large metropolitan areas such as Dallas-Fort Worth, Houston, Austin, and San Antonio. Known as the “Texas Triangle,” this region encompasses 66 percent of Texas’s population and generates 77 percent of its GDP. Over the next 40 years, the area is projected to grow by more than 65 percent.

This robust drive-in market creates substantial demand to support the development of a strategically positioned convention center in College Station.

Estimated Drive-Time Statistics from College Station (2024)			
	1-Hour	3-Hour	5-Hour
Population	561,352	20,323,158	28,768,138
Households	203,088	7,457,025	10,613,037
Median Household Income	\$69,790	\$78,405	\$77,882
Median Home Value	\$300,992	\$317,942	\$307,697
Median Age	33.4	36.2	36.7
Source: ESRI			



Corporate Presence

Growing Corporate Presence = More Events

- Educational services form the largest industry in the county, employing nearly 17,000 people, with Texas A&M University serving as the city's largest employer, contributing more than 5,000 jobs
- According to a Lightcast Economy Overview report, jobs in Brazos County grew by 13.8 percent from 2017 to 2022, outpacing the national growth rate by 10 percent
- The university provides a steady influx of highly educated workers, supporting business growth and the meetings market
- The "Texas Triangle" region is home to 53 of the state's 54 Fortune 500 companies, adding to the potential users of the proposed Project
- The county's position in the heart of the "Texas Triangle," combined with its highway accessibility and skilled workforce, continues to attract businesses to the area

Brazos County-Area Major Employers



Colleges & Universities

The table below provides data on colleges and universities within 50 miles of the Project ZIP code, based on the latest data from the National Center for Education Statistics. Universities can generate significant economic impact for local municipalities, driving strong visitor impact through events such as graduations and athletic games, and providing a foundation for attracting and retaining young workforce talent upon graduation. Furthermore, this segment often provides inelastic demand for housing.

Texas A&M University, the largest and closest institution in the area, is by far the dominant academic and economic driver, offering the highest degree level.

Regional Colleges & Universities				
Institution	Location	Distance from Site	Highest Degree Offered	Enrollment
Texas A&M University	College Station	2.4 miles	Doctoral	74,014
Blinn College District	Brenham	30.9 miles	Associate's	17,909
Prairie View A&M University	Prairie View	41.0 miles	Doctoral	9,056
Sam Houston State University	Huntsville	46.1 miles	Doctoral	21,480
Total				122,459
Source: National Center for Education Statistics				

Texas A&M University - College Station

College Station is home to Texas A&M University's main campus, which boasts the second-largest student body in the nation.

- The Brazos Valley is a global leader in engineering, agriculture, and biomedical innovations due to the presence of the Texas A&M System, Texas A&M University, and several key state research and extension agencies
- More than 20 percent of the university's enrollment consists of graduate students
- By 2025, the university aims to enroll 25,000 students in its College of Engineering
- This area has the highest per capita concentration of material scientists and engineers among all 409 metropolitan statistical areas in the United States
- The 2,300-acre RELLIS campus, located in Bryan, Texas, serves as a state-of-the-art hub for research, technology, and workforce development, fostering collaboration between the technology industry, educators, and students



593K+

Texas A&M University
Alumni



72.6K

Fall 2024 Main Campus
Enrollment



\$1.3B

Generated R&D
Expenditures in 2023



#23rd

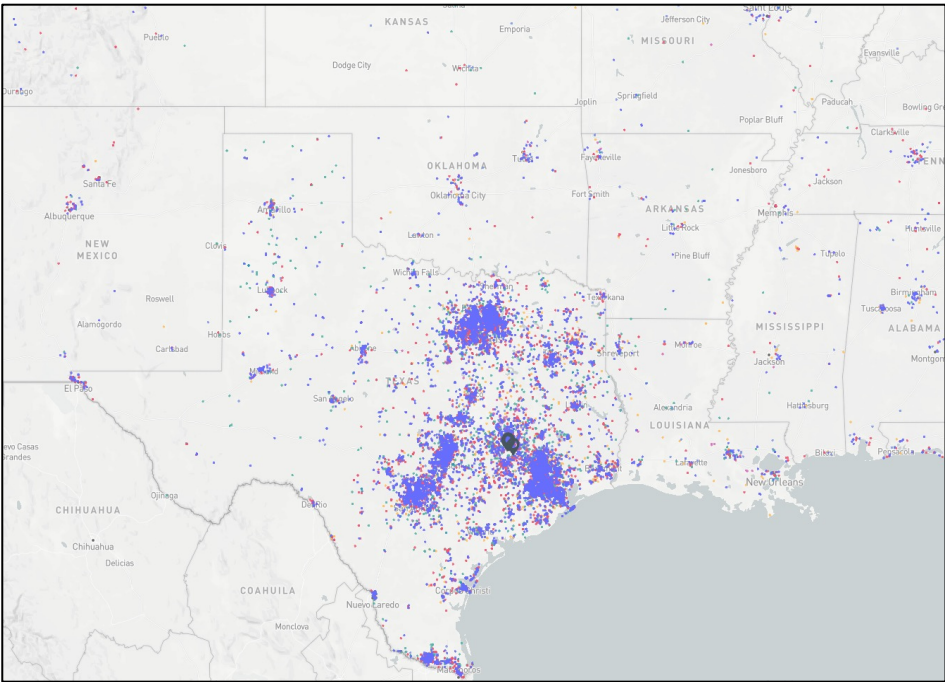
Rank in National Science
Foundation's 2023 Survey

Tourism Assets

Hunden utilized Placer.ai to assess visitation trends in 2023 for several of College Station’s regional attractions.

The Texas A&M Aggies are one of the most recognized college football teams in the nation. Both Kyle Field and Reed Arena draw hundreds of thousands of long-distance visitors to College Station each year.

The George H. W. Bush Presidential Library and Museum, which also serves as the burial site of the 41st president of the United States, attracts the highest proportion of long-distance visitors. The archives hold more than 43 million pages of official records and personal papers documenting the president’s life and career.



Visitation to Regional Attractions January 1, 2023 - December 31, 2023								
Visitor Origins by Distance from Site	Kyle Field	Aggie Park	Reed Arena	Olsen Field at Blue Bell Park	George H. W. Bush Presidential Library & Museum	Bee Creek Park	Bonfire Memorial	Museum of the American GI
Locals - Within 25 miles	512,700	385,100	249,900	175,200	33,000	46,500	8,400	886
% of Total Visits	43%	38%	46%	50%	31%	62%	46%	22%
Regional - Over 25 miles & Less Than 100 miles	298,500	245,200	158,200	85,100	28,900	20,000	2,500	1,600
% of Total Visits	25%	24%	29%	25%	27%	27%	14%	40%
Long Distance - Over 100 miles	387,100	375,900	138,500	86,800	45,400	8,600	7,400	1,500
% of Total Visits	32%	37%	25%	25%	42%	11%	40%	38%
Total Visits	1,198,300	1,006,200	546,600	347,100	107,300	75,100	18,300	3,986

Source: Placer.ai

Implications

Economic, Demographic & Tourism Analysis

"Texas Triangle" Location

The Texas Triangle is among the fastest-growing economic regions in the United States, encompassing the state's five largest cities and home to 66 percent of Texas's population. By 2030, the area is projected to evolve into a single, giant metropolis.

Strong Highway Accessibility & Corporate Presence

Located within a three-hour drive of multiple major markets, Brazos County provides access to 53 of Texas's 54 Fortune 500 companies. This proximity to corporate headquarters, combined with key local employers, generates demand for conferences, trainings, and career fairs.

Innovation & Economic Growth

The presence of Texas A&M University and several key state research and extension agencies establishes Brazos County as a hub for innovation. The university's resources support the growth of new businesses, serving as a pipeline for the local events and meetings business.





02

Convention & Meetings Market Analysis

Convention Center & Event Venue Industry Trends

Meetings Industry Overview

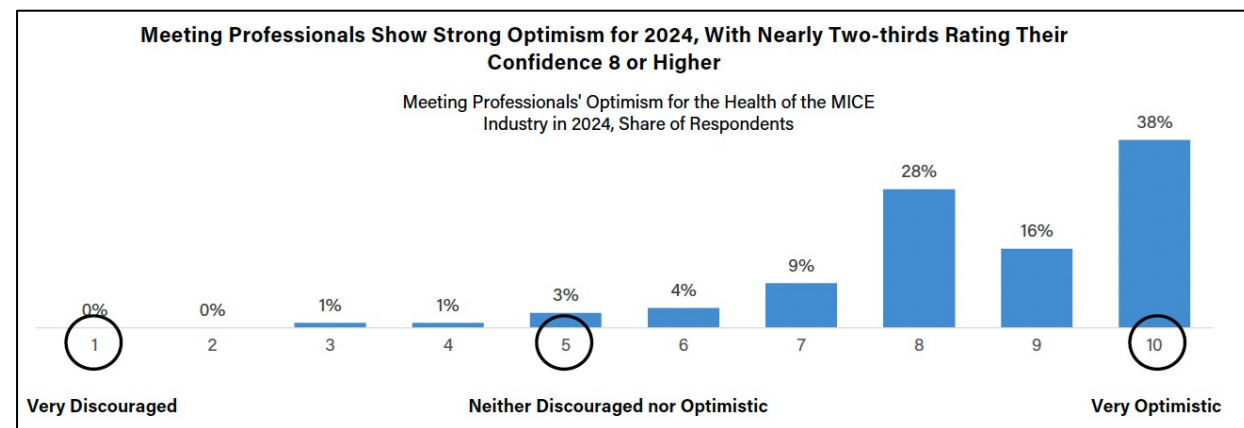
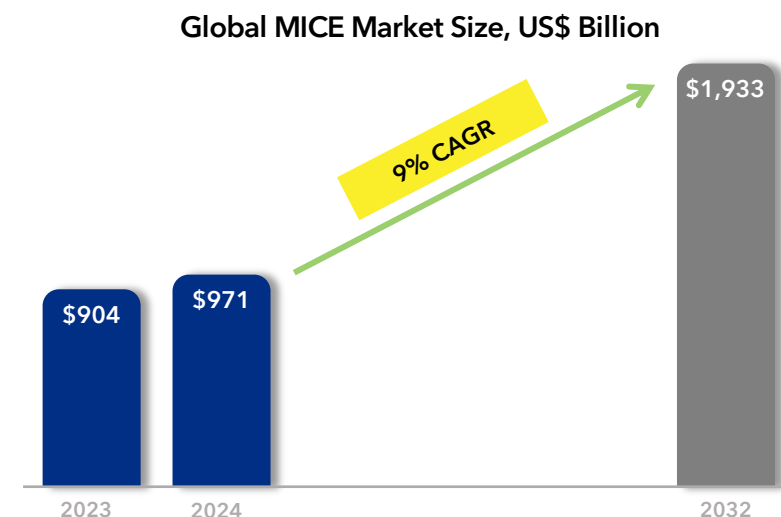
The meetings industry has evolved significantly since the pandemic. Meeting planners and user groups are now seeking innovative spaces that offer more flexibility and engagement options.

- Traditional large exhibit halls are no longer a necessity.
- Ballrooms and breakout rooms are in higher demand than ever.
- Outdoor and hybrid spaces have become popular for fostering engagement and comfort.



Meetings Industry Recovery and Growth Outlook

- **Demand Growth Accelerating:** The meetings sector is expected to achieve a compound annual growth rate (CAGR) of nine percent by 2032 as the demand for in-person meetings accelerates.
- **Industry Confidence Is High:** 82 percent of meetings professionals rate their optimism at 8 or above, with 38 percent giving a perfect 10 – mirroring the positive outlook of travel CEOs for the future of events.
- **Groups Implementing Cost Control Strategies:** Companies are adjusting budgets by opting for more cost-effective solutions, such as choosing three-star hotels instead of four-star accommodations.



Source: Skift Research State of Travel Report 2024

*MICE: Meetings, Incentives, Conferences, and Exhibitions

Convention & Meetings Industry Trends

Major trends in the ever-changing convention and meetings industry include the increasing need for seamless service, rising costs, demand for flexible meeting spaces, and locations with walkable amenities and headquarters hotels. Convenience and affordability for meeting planners are of critical importance.



SEAMLESS SERVICE

Events are better facilitated when the event planning experience is seamless.



EVENT COST

Rising transportation, catering, and services costs are driving venue selection.



TECHNOLOGY

Demand for venues that can accommodate various technological needs is rising.



FLEXIBLE SPACE

Meeting planners are interested in venues that offer high-quality flexible spaces.



WALKABLE AMENITIES

Restaurants and attractions nearby make a destination more desirable.



HEADQUARTERS HOTELS

Convention centers with headquarters hotels are more attractive to meeting planners.

What it Means

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



Rising transportation, catering, and services costs are driving venue selection.



CVBs and DMOs can provide financing incentives for convention centers to ensure both parties optimize ROI.



To maximize operational efficiency, venues will need to incorporate with sustainable features in mind that reduce long-term expenses.



Meeting planners are interested in venues that offer high-quality flexible spaces.



Venues should leverage modular design that accommodates engaging, multi-use spaces.



Increased space utilization allows venues to be more flexible and profitable. Vertical expansion is becoming a popular solution.

What it Means cont'd

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



SEAMLESS SERVICE

Events are better facilitated when the event planning experience is seamless.



CONSOLIDATION

Convention centers and DMOs will need to work in conjunction to have fewer points of contact for event planners.



INCENTIVES

DMOs and CVBs should help convention centers offer financial incentives to attract more events.



TECHNOLOGY

Demand for venues that can accommodate various technological needs is rising.



BANDWIDTH

Venues should prioritize increasing their bandwidth capabilities to allow for increased connectivity.



ENGAGEMENT

Venues will need to incorporate collaborative spaces that can accommodate immersive experiences within building design.

What it Means cont'd

Trends in the meetings and events industry indicate important factors in the decision-making process of choosing a meeting or event site. Consideration of these factors will help any proposed conference center development's competitiveness among other local and regional facilities.



Convention centers with headquarters hotels are more attractive to meeting planners.



Convention centers should form lasting relationships with local hotels.



Cities should explore opportunities to connect existing hotels to convention centers or develop a headquarters hotel, if necessary.



Restaurants and attractions nearby make a destination more desirable.



New conference centers should be designed with a campus style in mind to maximize economic impact.



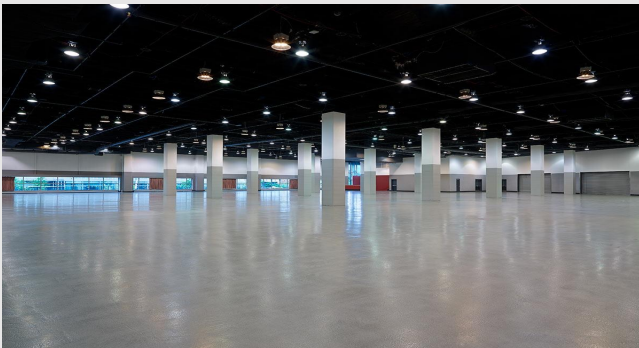
Cities can create strategic layouts in collaboration with local retailers to ensure amenities synergize with the conference center.

Function Space Types

The following outlines the three main function space types for convention and event facilities along with their design elements that are often required by event groups. An optimal development in College Station would include a diverse mix of these spaces.

Exhibit Hall

Exhibit hall space tends to accommodate the largest group sizes and typically hosts conventions, trade shows, and sporting events. These spaces often emphasize simplicity, consisting of concrete flat floors, high ceiling heights, and large open areas that can allow for a variety of event types and setups.



Ballroom Space

Ballrooms are typically larger than meeting rooms and primarily host banquets, conferences, and smaller conventions. Flexibility of these spaces is a crucial element. Quality ballrooms must offer column-free spaces and moveable walls, patterned carpeting, chandeliers, and an overall sleek and swanky design.



Meeting Space

Meeting rooms and boardrooms tend to accommodate smaller audiences and are typically used for business meetings or breakout space during conferences. These spaces are often occupied by table setups. Although design standards for meeting spaces are not as high compared to ballrooms, quality is still a valuable component for many groups.



Industry Trends: Meeting & Event Planner Survey Implications

Pre-Pandemic Level Recovery

The tables below highlight the expected recovery timeline for the meetings and events industry and the main reasons that attendee numbers have not yet returned to pre-pandemic levels.

Expectations on Return to Pre-Pandemic Attendee Levels	
Expectation	Percentage
Attendee numbers already recovered	35%
In 2024	42%
Within 2 years	15%
Within 3-5 years	5%
Not expected to return to 2019 levels	3%
Source: 2024 Global Meetings & Events Forecast	

Factors Impacting Pre-Pandemic Level Recovery	
Factor	Percentage
Attendee health concerns	44%
Cost	42%
Attendee safety concerns	41%
Hosting fewer events for people to attend	29%
Other	5%
Source: 2024 Global Meetings & Events Forecast	

Site Selection & Meeting Format

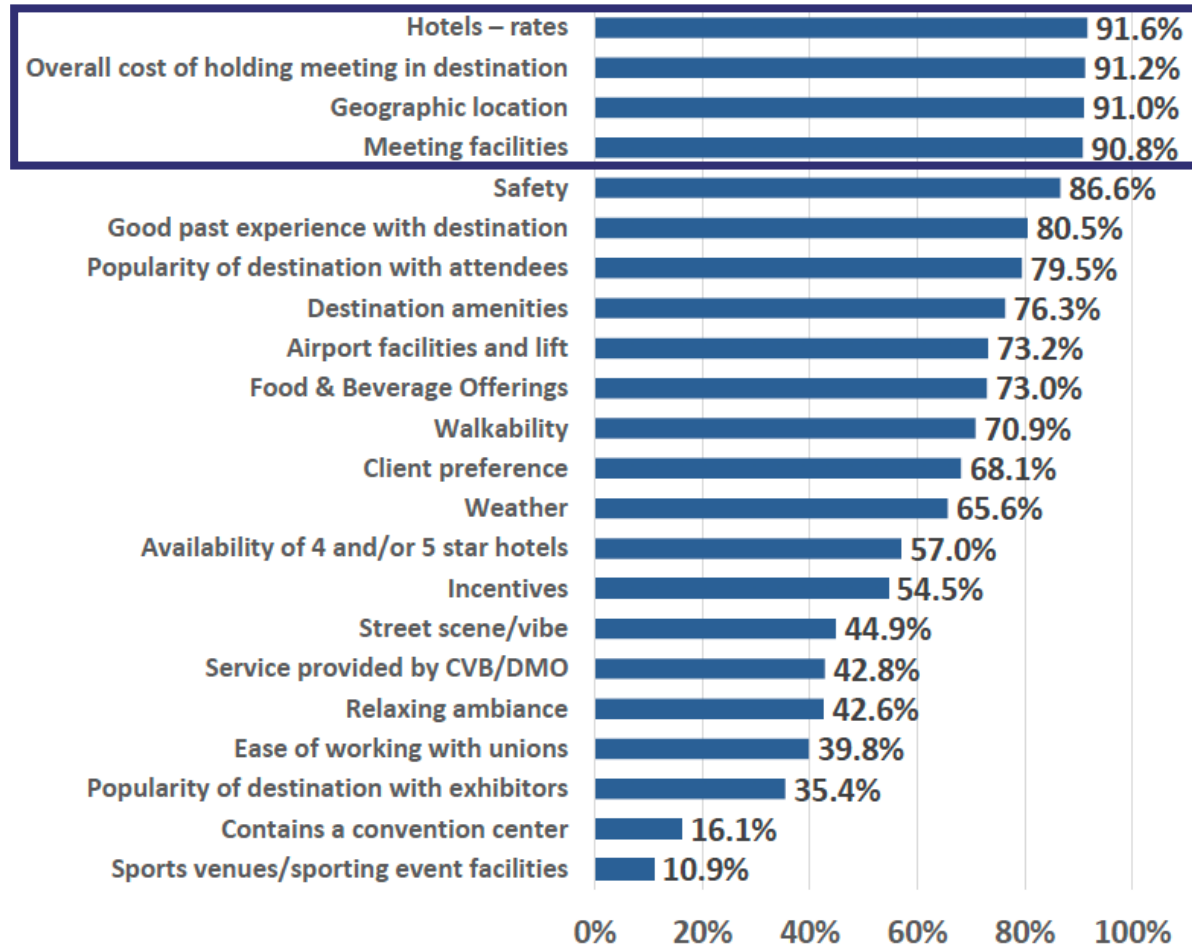
The 2024 Global Meetings & Events Forecast was developed through meeting and event data sources, interviews with industry leaders, and proprietary surveys of meeting professionals.

Selection of meeting location and planned meeting formats are summarized in the adjacent tables. Location and size are the most influential factors for event planners.

Planned Meeting Format		
Format	2021	2024
In-person only	31%	63%
Hybrid	31%	19%
Virtual Only	38%	18%
Source: 2024 Global Meetings & Events Forecast		

Site Selection Influencing Factors	
Factor	Percentage
Ease of travel to location for attendees	35%
Specific location type need (near airport, customer, etc.)	28%
Size of meeting space	25%
Past experience with site	17%
Ability to host hybrid meetings	16%
Preferred supplier programs	16%
Safety concerns	13%
Safety and health protocols	12%
Sustainability	11%
Repeat destination	8%
Resort destination	8%
Food & beverage service	8%
Online reviews	6%
Source: 2024 Global Meetings & Events Forecast	

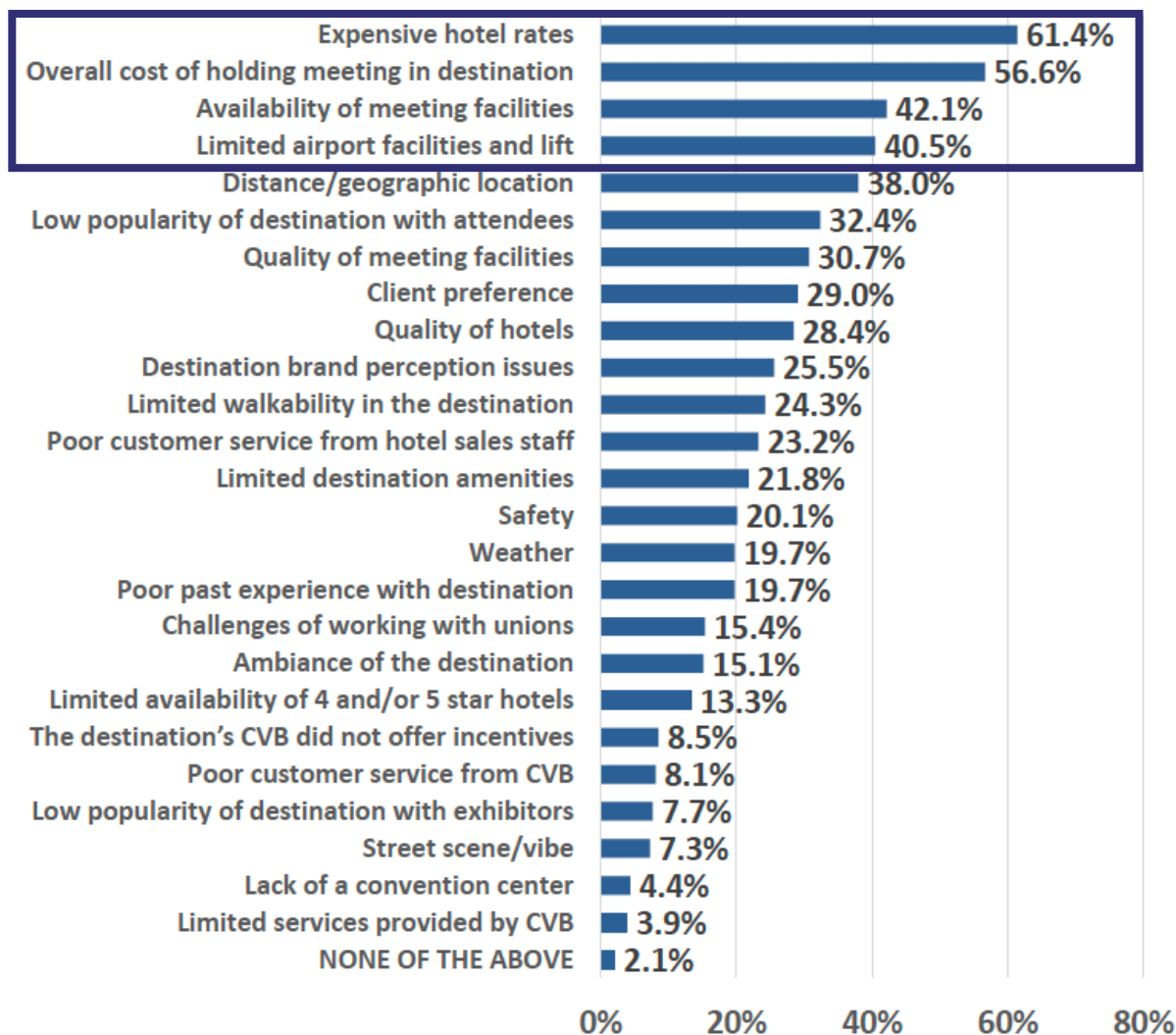
HOTELS - COST - LOCATION - FACILITIES: What Groups Demand



TOP TWO BOX SCORE	CORP.	3RD PARTY	ASSOC.	SMERF
Hotels – quality	95.3%	96.5%	93.0%	93.0%
Hotels – rates	91.3%	95.1%	95.2%	91.1%
Overall cost of holding meeting in destination	89.7%	95.1%	95.6%	93.0%
Geographic location	92.1%	95.1%	91.1%	89.7%
Meeting facilities	91.7%	95.1%	91.9%	91.1%
Safety	86.6%	89.5%	89.6%	87.8%
Good past experience with destination	82.6%	88.1%	82.2%	81.7%
Popularity of destination with attendees	81.0%	88.1%	83.3%	78.9%
Destination amenities (restaurants, entertainment, etc.)	80.6%	83.9%	79.3%	75.1%
Airport facilities and lift	77.1%	79.0%	74.4%	70.4%
Food & Beverage Offerings	78.7%	76.2%	74.8%	73.2%
Walkability	68.0%	69.2%	75.2%	69.0%
Client preference	78.7%	95.1%	71.9%	75.6%
Weather	71.5%	67.1%	67.4%	63.8%
Availability of 4 and/or 5 star hotels	69.2%	69.9%	57.8%	54.5%
Incentives	59.7%	69.9%	56.7%	58.2%
Street scene/vibe	46.2%	45.5%	46.3%	43.2%
Service provided by CVB?DMO	40.3%	55.2%	49.3%	50.7%
Relaxing ambiance	46.6%	44.8%	43.7%	47.4%
Ease of working with unions	44.3%	53.1%	44.1%	36.6%
Popularity of destination with exhibitors	39.9%	49.0%	40.4%	39.4%
Contains a convention center	14.2%	13.3%	17.8%	12.2%
Sports venues/sporting event facilities	16.6%	12.6%	8.5%	11.7%

Source: Destination Analysts - The CVB and the Future of the Meetings Industry

What Causes Groups to Go Elsewhere



	CORP.	3RD PARTY	ASSOC.	SMERF
Expensive hotel rates	54.7%	64.3%	68.4%	66.2%
Overall cost of holding meeting in destination	51.6%	58.0%	62.9%	58.3%
Availability of meeting facilities	37.9%	39.2%	42.3%	40.7%
Limited airport facilities and lift	42.6%	43.4%	40.8%	40.3%
Distance/geographic location	34.4%	35.7%	39.3%	35.2%
Low popularity of destination with attendees	33.2%	42.0%	37.1%	37.5%
Quality of meeting facilities	29.3%	31.5%	33.1%	37.0%
Client preference	36.7%	53.1%	31.3%	34.7%
Quality of hotels	33.6%	32.9%	28.7%	29.6%
Destination brand perception issues	26.2%	37.1%	30.9%	27.8%
Limited walkability in the destination	18.0%	21.0%	27.6%	27.3%
Poor customer service from hotel sales staff	25.4%	27.3%	27.2%	29.2%
Limited destination amenities (restaurants, entertainment, etc.)	21.1%	21.0%	22.4%	24.1%
Safety	20.7%	21.7%	23.2%	20.8%
Poor past experience with destination	22.7%	26.6%	22.8%	25.9%
Weather	23.0%	27.3%	23.2%	21.8%
Challenges of working with unions	18.0%	18.9%	15.4%	12.0%
Ambiance of the destination did not fit the meeting	16.4%	16.1%	16.5%	13.4%
Limited availability of 4 and/or 5 star hotels	18.0%	17.5%	14.0%	13.0%
The destination's CVB did not offer incentives	7.0%	12.6%	11.4%	11.1%
Poor customer service from Convention & Visitors Bureau	7.8%	7.7%	8.5%	8.8%
Low popularity of destination with exhibitors	7.4%	9.1%	10.3%	7.9%
Street scene/vibe	6.6%	4.9%	9.6%	4.6%
Lack of a convention center	2.7%	3.5%	5.1%	3.2%
Limited services provided by Convention & Visitors Bureau	4.3%	4.2%	5.5%	5.1%

Source: Destination Analysts – The CVB and the Future of the Meetings Industry

Complementary District Offerings

Many of the top districts create a density of retail, restaurant, entertainment, multifamily, office, and hotel offerings adjacent to major demand inducing assets such as arenas, stadiums or event centers in order to create a critical mass of people 24/7.

The top entertainment districts across the country infuse a variety of elements that synergize together to draw in both locals and visitors. This is executed in many ways. Many times, a “hero and halo” effect occurs, where there is a central demand driver such as a convention or event center and then surrounding supportive uses that facilitate 24/7 activity.

The best districts implement the following:

- Recreational biking and fitness trails running near the development and connect a loop path to it, linking the ample lushly landscaped public green spaces, nooks, playground, and festival plazas
- Vehicular through-streets that allow cars to drive through the development for better visibility and access, just as a village “main street” is a commuting crossroads
- Street grid extends outward to other community uses, particularly residential neighborhoods and existing street network for a seamless walkable and urban transition
- All-year programmed events catering to all age groups create a true community civic space, often in a central green space and inside food hall buildings during colder seasons
- Wide shady sidewalks and various levels of pedestrian platforms and bridges create unique restaurant seating areas, allowing for vertical visual variety and scenic vistas

It will be important to position complementary development adjacent or walkable to the Project site to maximize the destination appeal to groups and meeting planners.

Industry Trends: Headquarters (HQ) Hotel

Tiered Convention Markets

Meeting planners often refer to the meetings market as a tier one, two, or three destination. Tiers are often descriptions rather than designations, which are subject to perception. Although meetings destinations do not have a concrete rating system such as hotels have, each tier has distinct attributes and advantages. Tiers do not denote quality or size. The following descriptions were sourced from the MINT database.



First-Tier Destination

First-tier destinations may be the easiest to define and are typically the biggest convention cities in the country such as Las Vegas, Orlando, Chicago, etc. Key characteristics that these destinations have in common include an airport with ample nonstop and international access, hotel inventory with a minimum of 10,000 committable sleeping rooms, convention centers with a minimum of 500,000 gross square feet of exhibit space, distinctive leisure-travel appeal, and abundant dining, entertainment, and attraction options for attendees. These places are typically major metropolitan hubs with strong travel infrastructure.

Second-Tier Destination

A destination is often categorized as a second-tier destination simply because of its size and affordability perception. Second-tier cities include Austin, Baltimore, Tampa, Charlotte, Columbus, etc. Key attributes include convention facilities with less than 500,000 gross square feet, airlift with nonstop domestic options, attractizn of a regional drive market, adjacent or connected hotel rooms, variety of entertainment options, and sufficient dining establishments.

Third-Tier Destination

The key is to not consider a third-tier destination as being third-class, because this tier is really based on the size of the city and its convention offerings, not quality or even cost. Examples of third-tier cities include Atlantic City, Reno, Milwaukee, Portland, Cleveland, Louisville, Raleigh, etc. Measurable attributes include a regional airport with less nonstop or direct airlift, function space less than 350,000 gross square feet, and distinctive leisure travel appeal. Often, third-tier destinations are the choice for incentive travel and find themselves competing for the business along with first- and second-tier destinations.

HQ Hotel Trends

In the past, in order to service a convention, meeting planners were typically expected to contract with multiple hotels, pay for their own transportation, and seek additional event and meeting locations. In recent years, however, cities have begun to offer room packages within a few large hotels adjacent to convention centers. This improvement in packaging the convention product led to expectations by the market and competitive pressure for all convention facilities to offer a convenient package of hotels attached, adjacent or within immediate walking distance of the convention facility. This eliminates the need for shuttle service in most cases and often the hotels provide enough meeting and event spaces for the planners' additional needs.

HQ hotels that do not offer such a package suffer considerably when competing for meetings, conferences, conventions, and other events. HQ hotels that offer the best packages, such as those in Indianapolis, San Diego, Charlotte, and San Antonio, have shown excellent convention center performance.



Why HQ Hotels Are Needed

Headquarters hotels are found next to many of the major convention centers across the country and development of these hotels has exploded over the past decade. This increase encourages the questions: What makes these hotels special, and why are they needed to have a strong convention and meetings destination? The following bullets outline the importance of headquarters hotels and why they are critical for any convention destination:

- Meeting planners and attendees want to have a **connected hotel where they can walk back and forth easily from their meeting to their hotel room.** Convention destinations that do not have this lose significant business to other destinations with this capability.
- Groups will hold other events in the function space at the headquarters hotel or there can be simultaneous events occurring at one time.
- Room counts need to be high because it is important to have a large enough room block in the hotel to host a majority of the attendees. A **destination may lose out on a large event if another city has a larger headquarters hotel with a larger available room block.**
- These hotels are typically full-service because during non-convention days it is **important that the hotel show self-reliance and generate its own meetings business.** This means that the hotel has ballroom and meeting room space, several dining options, and other amenities typically found in full-service properties such as a spa, fitness center, and pool.

Impact of HQ Hotel Development

Hunden recently conducted an exhaustive analysis of more than 12 convention markets that did or did not introduce a convention headquarters hotel to determine how rates, occupancies, RevPAR (a product of occupancy and ADR), and total hotel revenue changed.

Hunden conducted this analysis on not only the Primary competitive set of walkable hotels around the convention center, but also on a Secondary set of hotels that are lower quality, older, and/or farther away (up to three miles), to understand how compression from new business helps or hurts these properties.

The results are impressive and show positive impacts for both the Primary and Secondary sets of hotels, with even more pronounced benefits for the Secondary set. A hotel adjacent or connected to a convention center venue in College Station is imperative.

Performance of Primary & Secondary Hotel Sets

10 Years Before & After Introduction of a Convention Headquarters Hotel*

ADR - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	1.3%	3.5%	2.2%	22.4%
B - Secondary Set	1.3%	4.6%	3.3%	32.9%

Occupancy - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	0.6%	1.4%	0.8%	8.0%
B - Secondary Set	0.2%	1.6%	1.4%	14.1%

RevPAR - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	1.9%	5.1%	3.2%	31.8%
B - Secondary Set	1.5%	6.5%	5.0%	49.9%

Total Revenue - Average Annual Growth Rate

	Performance Before HQ Hotel	Performance After HQ Hotel	Annual Difference	10-Year Cumulative Diff
A - Primary Set	5.1%	9.0%	3.9%	39.0%
B - Secondary Set	7.0%	9.7%	2.7%	27.5%

Source: STR, Hunden Partners

P3 Hotel Trends

The following table details some of the major public-private partnership (P3) headquarters hotel developments that have occurred across the country in primarily tier one and tier two cities. The following key headlines were determined:

- Over the past decade, headquarters hotel development has increased across the country and become more costly.
- On average, **over the past decade**, the **public sector has covered approximately 41 percent of the total development** cost of headquarters hotel development.
- On a per room basis, total development cost over the past decade was approximately **\$416,000. With recent accelerated inflation, costs per key have surpassed \$500,000 and in many markets are more than \$600,000 per key.**
- Average development cost over the past decade was **\$305 million.**
- Municipalities utilize creative financing tools to mitigate the high development cost.

Public-Private Hotel Developments										
City	State	Brand	Opening	Rooms	Total Hotel Costs (millions)	Cost/Room (000s)	Public Sector*		Private Sector	
							Investment (millions)	Percentage of Total Cost	Investment (millions)	Percentage of Total Cost
Minneapolis	MN	Hilton	1992	816	\$145	\$177	\$89.2	61.6%	\$55.6	38.4%
Norfolk	VA	Mariott	1992	405	\$60	\$148	\$23.0	38.3%	\$37.0	61.7%
Philadelphia	PA	Mariott	1995	1,408	\$237	\$168	\$36.5	15.4%	\$200.0	84.6%
Atlantic City	NJ	Sheraton	1997	502	\$85	\$169	\$38.2	44.9%	\$46.8	55.1%
Philadelphia	PA	Loews	1998	350	\$54	\$154	\$18.0	33.3%	\$36.0	66.7%
Denver	CO	Adam's Mark	1998	1,230	\$135	\$110	\$25.0	18.5%	\$110.0	81.5%
Tampa	FL	Mariott	1998	716	\$105	\$146	\$27.0	25.8%	\$77.5	74.2%
Wichita	KS	Hyatt	1998	303	\$42	\$140	\$20.1	47.3%	\$22.3	52.7%
Miami Beach	FL	Loews	1998	800	\$110	\$138	\$29.0	26.4%	\$81.0	73.6%
Franklin	TN	Mariott	1999	300	\$30	\$100	\$12.0	40.0%	\$18.0	60.0%
Madison	WI	Hilton	2000	222	\$29	\$131	\$10.0	34.5%	\$19.0	65.5%
Baltimore	MD	Mariott	2001	750	\$133	\$177	\$10.0	7.5%	\$123.0	92.5%
Chattanooga	TN	Chattanooga	2001	202	\$43	\$213	\$20.0	46.5%	\$23.0	53.5%
Indianapolis	IN	Mariott	2001	615	\$100	\$163	\$23.0	23.0%	\$77.0	77.0%
Charlotte	NC	Westin	2003	700	\$143	\$204	\$16.0	11.2%	\$127.0	88.8%
Louisville	KY	Mariott	2005	617	\$111	\$180	\$57.5	51.8%	\$53.5	48.2%
Boston	MA	Westin	2007	793	\$200	\$252	\$15.0	7.5%	\$185.0	92.5%
San Antonio	TX	Hyatt	2008	1,003	\$280	\$279	\$208.0	74.3%	\$72.0	25.7%
Lancaster	PA	Mariott	2009	294	\$45	\$153	\$20.0	44.4%	\$25.0	55.6%
Fort Worth	TX	Omni	2009	600	\$160	\$267	\$89.0	55.6%	\$71.0	44.4%
Fort Wayne	IN	Courtyard by Marriott	2010	250	\$47	\$188	\$12.0	25.5%	\$35.0	74.5%
Indianapolis	IN	JW Marriott, Courtyard, Springhill Suites	2011	1,568	\$354	\$226	\$48.5	13.7%	\$305.5	86.3%
Nashville	TN	Omni	2013	800	\$272	\$340	\$128.0	47.1%	\$144.0	52.9%
Washington	DC	Mariott	2013	1,167	\$639	\$548	\$308.0	48.2%	\$331.0	51.8%
Austin	TX	JW Marriott	2015	1,012	\$303	\$299	\$3.0	1.0%	\$300.0	99.0%
Evansville	IN	Doubletree	2015	253	\$44	\$174	\$20.0	45.5%	\$24.0	54.5%
Louisville	KY	Omni	2016	612	\$289	\$472	\$139.0	48.1%	\$150.0	51.9%
Houston	TX	Mariott	2016	1,000	\$335	\$335	N/A	N/A	N/A	N/A
Austin	TX	Fairmont	2018	1,048	\$370	\$353	TBD	TBD	TBD	TBD
Irvine	TX	Mariott	2018	350	\$113	\$323	\$55.0	48.7%	\$58.0	51.3%
Portland	OR	Hyatt	2019	600	\$224	\$373	\$74.0	33.0%	\$150.0	67.0%
Austin	TX	Mariott	2020	613	\$275	\$449	TBD	TBD	TBD	TBD
Kansas City	MO	Loews	2020	800	\$325	\$406	\$265.0	81.5%	\$60.0	18.5%
Oklahoma City	OK	Omni	2021	605	\$241	\$398	\$85.4	35.4%	\$155.6	64.6%
Salt Lake City	UT	Hyatt Regency	2022	700	\$377	\$539	N/A	N/A	N/A	N/A
Fort Worth	TX	Omni (Expansion)	2026	400	\$217	\$543	\$53.0	24.4%	\$164.0	75.6%
Indianapolis	IN	Hilton Signia	2026	800	\$550	\$688	N/A	N/A	N/A	N/A
Average	-	-	2008	681	\$195	\$274	\$61.8	31.7%	\$104.3	68.3%
Average, Last 10 Years	-	-	2019	717	\$305	\$416	\$119.7	41.3%	\$153.7	58.7%
Total	-	-	-	25,204	\$7,221	-	\$1,924.4	-	\$3,336.8	-
* Public participation may be upfront capital only, or could include value of abatements and other incentives over time										
Source: Hunden Strategic Partners										

Publicly-Funded Hotels

The adjacent table shows tax-exempt bond financing of headquarters hotels across the country, some of which were entirely financed and thereby owned by the public sector.

The following key headlines were identified:

- In many situations the public sector owns the headquarters hotel entirely and finances the project completely with tax-exempt bonds.
- This has been demonstrated in Houston with the Hilton Hotel, as well as in Dallas with the Omni, a hotel that was developed in 2012.

Tax-Exempt Financing with Bonds Supported by Project Revenues						
City	State	Brand	Opening	Rooms	Public Bond Issue (millions)	Cost/Room (000s)
Indianapolis	IN	Signia	2026	800	\$625.0	\$781
Columbus	OH	Hilton (468-key Expansion)	2022	1,000	\$210.0	\$449
Chicago	IL	Marriott	2016	1,200	\$400.0	\$333
Cleveland	OH	Hilton	2016	600	\$272.0	\$453
Chicago	IL	Hyatt Expansion	2013	451	\$180.0	\$399
Columbus	OH	Hilton	2012	532	\$178.0	\$335
Dallas	TX	Omni	2012	1,001	\$479.2	\$479
Fort Lauderdale	FL	Hilton	2011	1,000	\$415.0	\$415
Omaha	NE	Hilton (Expansion)	2011	150	\$37.0	\$247
Baltimore	MD	Hilton	2008	757	\$305.0	\$403
Erie	PA	Sheraton	2008	200	\$45.4	\$227
Phoenix	AZ	Sheraton	2008	1,000	\$346.1	\$346
Columbia	SC	Hilton	2006	300	\$67.0	\$223
Coralville	IA	Marriott	2006	286	\$33.0	\$115
Baltimore	MD	Hilton	2005	756	\$200.9	\$266
Denver	CO	Hyatt	2005	1,100	\$394.8	\$359
Providence*	RI	Hilton	2005	392	\$78.4	\$200
Vancouver	WA	Hilton	2005	226	\$47.5	\$210
Austin	TX	Hilton	2004	800	\$280.1	\$350
Bay City	MI	Doubletree	2004	150	\$32.9	\$219
Houston	TX	Hilton	2004	1,200	\$326.2	\$272
Omaha	NE	Hilton	2004	450	\$112.0	\$249
St. Louis	MO	Renaissance Suites	2003	1,081	\$276.6	\$256
Chesapeake	NY	Hyatt	2002	400	\$193.0	\$483
Overland Park	KS	Sheraton	2002	412	\$105.7	\$257
Trenton	NJ	Marriott	2002	197	\$58.0	\$294
Myrtle Beach	SC	Radisson	2001	404	\$76.5	\$189
Sacramento	CA	Sheraton	2000	503	\$104.9	\$209
Chicago	IL	Hyatt	1998	800	\$108.0	\$135
Providence*	RI	Westin	1995	364	\$70.0	\$192
Average	-	-	2007	617	\$202	\$312

* Estimated Cost
Source: Hunden Strategic Partners

Proposed HQ Hotels

In order to remain competitive in this market, the following markets in different parts of the country have proposed to either add or expand their respective convention center headquarters hotel based on market realities:

- Tulsa, Oklahoma - Cox Business Convention Center
- Cincinnati, Ohio - Duke Energy Convention Center
- Corpus Christi, Texas - American Bank Center



College Station Meetings Market Summary

Lost Business

The figure to the right outlines the reasons College Station lost business from 2022 to 2024.

- Of the 131 total lost events, 62 were due to facility gaps, unavailable dates, and other space-related reasons
- Lost events ranged from large conventions to youth sports tournaments
- Room night and economic impact calculations shown are based solely on the 62 events lost due to space constraints



62
Events Lost

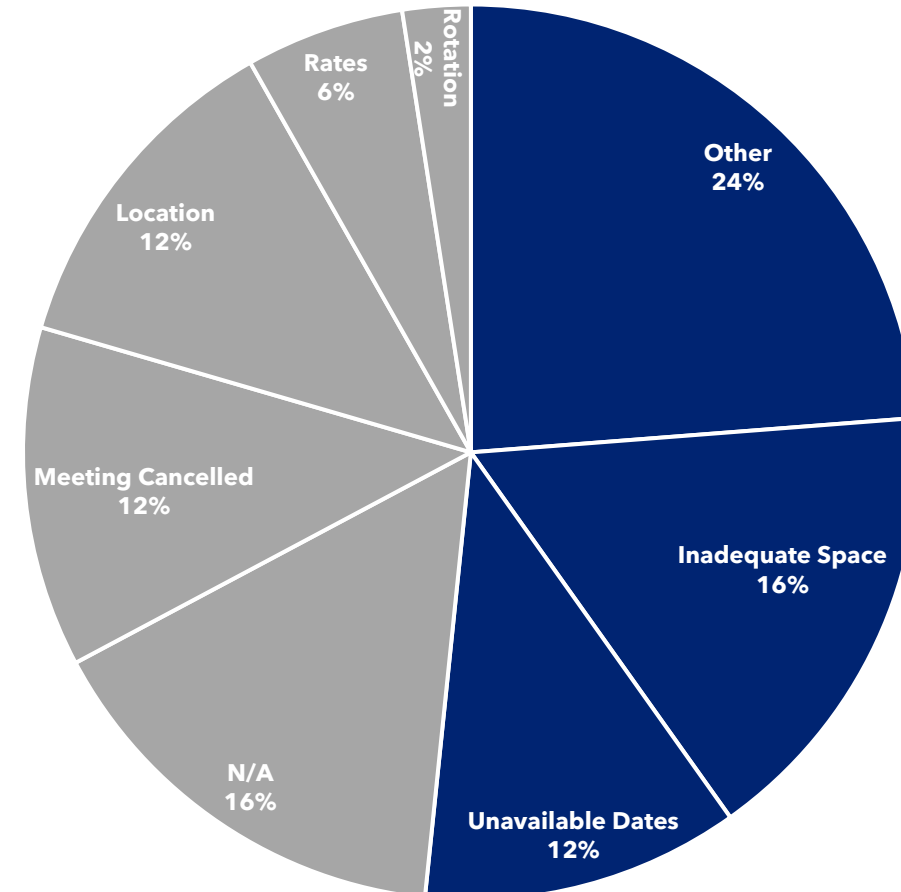


24.8K
Room Nights



\$13.2M
Economic Impact

2022-2024 Lost Business Report - Reasons



Booked Business – Events & Event Days

The tables to the right outline the number of events and event days sourced by Visit College Station at various local facilities from 2022 to 2024.

On average, Visit College Station sourced 146 events annually during this period, with stagnant growth across the studied time period. Conventions accounted for the highest share of booked events (30 percent), followed by meetings (25 percent).

Event days increased at an average annual rate of 24 percent. Similarly, conventions generated the largest share of event days (31 percent), followed by meetings (25 percent).

College Station Booked Events			
Event Type	2022	2023	2024
Banquet	0	2	4
City Wide	3	5	3
Convention	40	39	51
Event/Festival	2	1	1
Meeting	23	46	42
Other	6	3	3
Reunion	0	3	2
Seminar	8	15	18
Sport	41	29	27
Student	2	6	12
Trade Show	0	1	0
Total	125	150	163
Source: Visit College Station			

College Station Booked Events Days			
Event Type	2022	2023	2024
Banquet	0	4	5
City Wide	10	19	10
Convention	150	150	186
Event/Festival	5	2	3
Meeting	83	159	151
Other	19	10	10
Reunion	0	8	9
Seminar	24	40	95
Sport	124	103	88
Student	9	27	68
Trade Show	0	3	0
Total	424	525	625
Source: Visit College Station			

Booked Business - Attendance

The tables below summarize attendance metrics based on the previously presented event data. In 2024, College Station hosted approximately 103,500 attendees, reflecting a 32-percent decrease from 2022 and a 19-percent year-over-year decline.

Sports accounted for the largest share of total attendees (46 percent), while festivals events had the highest attendance per event, underscoring their potential impact on market visitation if bookings increased. Sports and meetings generated the highest estimated visitation based on event days, contributing 44 percent and 27 percent of the total, respectively.

College Station Total Attendance Per Event			
Event Type	2022	2023	2024
Banquet	–	450	570
City Wide	12,900	12,700	7,500
Convention	12,715	12,779	14,406
Event/Festival	10,200	6,700	500
Meeting	17,491	51,328	30,572
Other	9,402	126	1,410
Reunion	–	180	550
Seminar	965	1,311	1,097
Sport	87,989	41,739	46,560
Student	100	310	301
Trade Show	–	35	–
Total	151,762	127,658	103,466
"–" denotes unavailable data			
Source: Visit College Station			

College Station Average Attendance Per Event			
Event Type	2022	2023	2024
Banquet	–	225	143
City Wide	4,300	2,540	2,500
Convention	318	328	282
Event/Festival	5,100	6,700	500
Meeting	760	1,116	728
Other	1,567	42	470
Reunion	–	60	275
Seminar	121	87	61
Sport	2,146	1,439	1,724
Student	50	52	25
Trade Show	–	35	–
Average	1,214	851	635
"–" denotes unavailable data			
Source: Visit College Station			

College Station Estimated Visitation (Based on Event Days)			
Event Type	2022	2023	2024
Banquet	–	900	713
City Wide	43,000	48,260	25,000
Convention	47,681	49,150	52,540
Event/Festival	25,500	13,400	1,500
Meeting	63,120	177,416	109,914
Other	29,773	420	4,700
Reunion	–	480	2,475
Seminar	2,895	3,496	5,790
Sport	266,113	148,245	151,751
Student	450	1,395	1,706
Trade Show	–	105	–
Total	478,532	443,268	356,087
"–" denotes unavailable data			
Source: Visit College Station			

Booked Business – Room Nights

The table to the right summarizes room night generation for events hosted in the College Station market.

The Hilton College Station & Conference Center and the Texas A&M Hotel and Conference Center contracted the highest number of room nights, contributing 22.4 percent and 21.9 percent of the total, respectively. The remaining events used other properties, likely due to the insufficient room block at these two properties.

Sports accounted for the largest share of total room nights (33 percent), followed by conventions (27 percent). In 2024, total room nights reached 46,184, reflecting a decrease from the past two years.

College Station Room Nights Contracted			
Event Type	2022	2023	2024
Banquet	–	100	180
City Wide	4,657	4,877	3,125
Convention	13,554	13,220	15,676
Event/Festival	530	240	300
Meeting	12,426	14,432	8,727
Other	1,324	199	360
Reunion	–	60	447
Seminar	1,540	1,901	3,816
Sport	26,207	12,043	12,295
Student	140	798	1,258
Trade Show	–	20	–
Total	60,378	47,890	46,184
"–" denotes unavailable data			
Source: Visit College Station			

Meetings

College Station Meetings Market

Bryan-College Station offers seven relevant meeting and event spaces with more than 5,000 square feet of function space. The Brazos County Expo is the only facility with exhibit space, while the Hilton Hotel & Conference Center is the only meeting venue that features sufficient function space along with a walkable hotel package. Texas A&M meeting facilities are not considered part of the competitive landscape due to their prioritization of university-affiliated events.

Local Environment - Meetings and Conference Spaces (sorted by total function space)												
Facility	Location	Facility Type	Total Function Space	Exhibit Space	Ballroom Space	Largest Ballroom	Meeting Space	Meeting Rooms	Walkable Hotels	Largest Walkable Hotel	Total Walkable Hotel Rooms	Average Rooms per Walkable Hotel
Brazos County Expo Complex*	Bryan, TX	Event Center	41,600	28,000	13,600	13,600	–	–	–	–	–	0
Legends Event Center**	Bryan, TX	Sports Facility	41,500	–	36,000	36,000	5,500	5	–	–	–	0
Hilton College Station & Conference Center	College Station, TX	Conf. Center / Hotel	25,919	–	18,935	11,360	6,984	7	4	301	624	156
The Brazos Center	Bryan, TX	Event Center	20,468	–	12,320	7,920	8,148	6	1	112	112	112
Texas A&M Hotel and Conference Center	College Station, TX	Conf. Center / Hotel	20,453	–	8,205	8,205	12,248	21	1	247	247	247
Embassy Suites by Hilton College Station	College Station, TX	Hotel	7,296	–	2,964	2,964	4,332	5	6	176	631	105
Cavalry Court	College Station, TX	Hotel	6,270	–	–	–	6,270	4	2	162	303	152
The George	College Station, TX	Hotel	5,236	–	–	–	5,236	2	2	162	303	152
Average			21,093	7,000	15,337	13,342	6,090	6	2	145	278	115
TEXAS A&M FACILITIES												
Kyle Field	College Station, TX	Football Stadium	87,913	–	17,507	17,507	70,406	8	1	247	247	247
Memorial Student Center	College Station, TX	Student Center	38,527	–	20,144	15,824	18,383	27	1	247	247	247
Reed Arena*	College Station, TX	Basketball Arena	30,600	–	12,700	6,500	17,900	7	–	–	–	–
Annenberg Presidential Conference Center	College Station, TX	Conference Center	11,100	–	–	–	11,100	4	–	–	–	–
Olsen Field at Blue Bell Park	College Station, TX	Ball Park	5,478	–	–	–	5,478	1	–	–	–	–

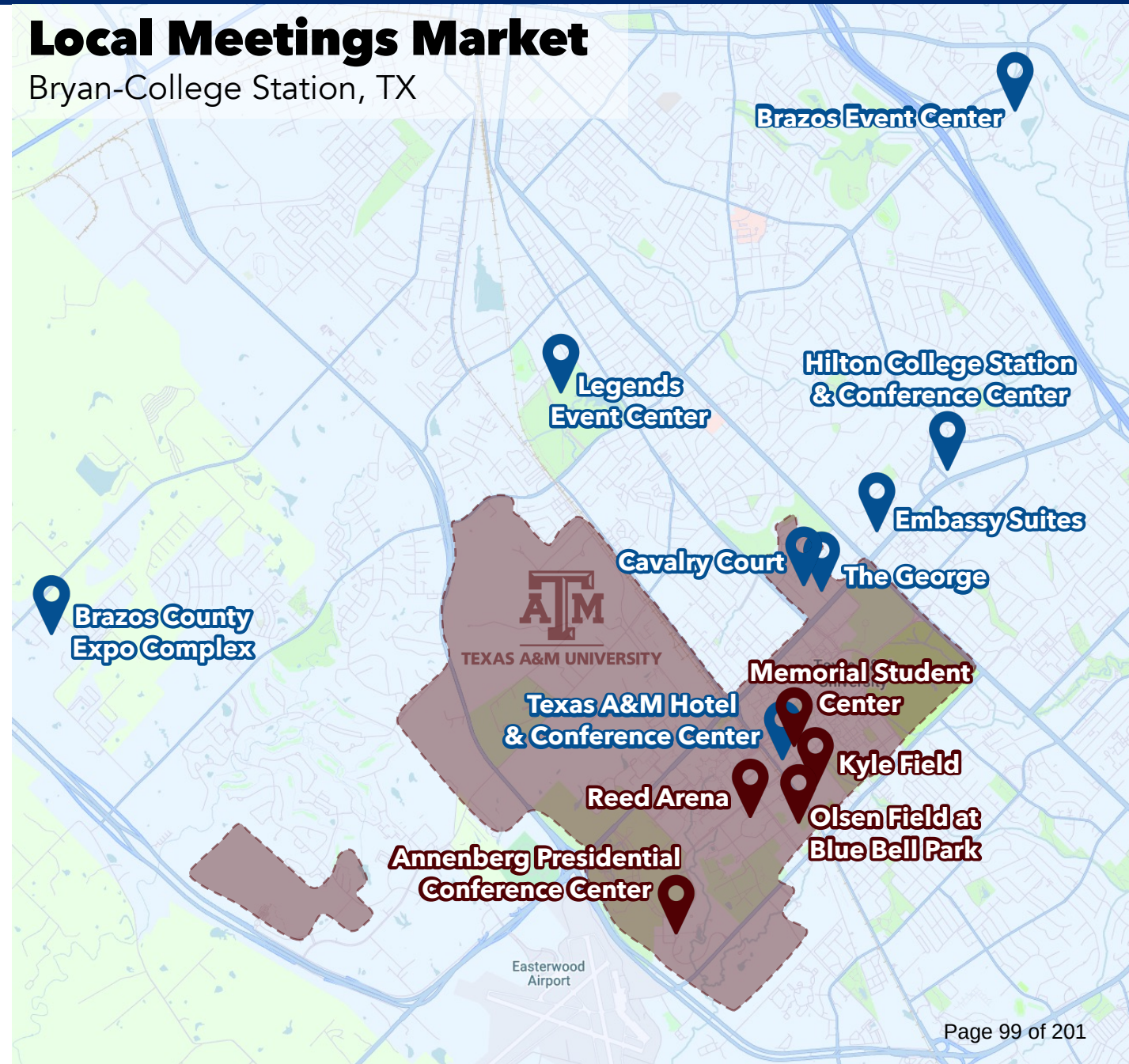
* Total function space does not include arena
 ** SF of function space estimated
 Source: Various Facilities, Smith Travel Research

College Station Meetings Market Cont.

The adjacent map shows the location of local meetings facilities, with Texas A&M facilities outlined and those outside of the university system shown in blue.

Local Meetings Market

Bryan-College Station, TX



Competitive Regional Texas Meetings Market (50K – 200K SF)

The State of Texas offers a wide range of convention and conference facilities and ranks third in the nation for prime exhibit space. The following list outlines mid-sized meeting facilities with 50,000 to 200,000 square feet of function space in suburban-urban markets. These facilities primarily target local corporate business and rotating state associations.

Regional Competitive Environment - Convention Centers (sorted by total function space)																
Facility	Location	Miles from Project	Facility Type	Total Function Space	Exhibit Space	Ballroom Space	Largest Ballroom	Meeting Space	Meeting Rooms	Number of Adjacent / Connected Hotels	Adjacent / Connected Hotel Rooms	Walkable Hotels	Largest Walkable Hotel	Total Walkable Hotel Rooms	Average Rooms per Walkable Hotel	Hotel Rooms / 1,000 SF of Exhibit Space
Loews Arlington Hotel & Convention Center	Arlington	188	Conv. Center / Hotel	191,504	43,269	98,887	51,224	49,348	44	2	1,188	–	–	–	0	27.5
Lone Star Convention Center & Expo Center	Conroe	66	Convention Center	141,700	111,000	22,300	22,300	8,400	7	–	–	–	–	–	0	0.0
American Bank Center Convention Center	Corpus Christi	237	Conv. Center	135,588	76,500	43,790	25,366	15,298	14	–	–	–	–	–	0	0.0
Richard M. Borchard Regional Fairgrounds	Robstown	239	Fairgrounds	102,651	80,000	20,000	20,000	2,651	4	–	–	–	–	–	0	0.0
El Paso / Judson F. Williams Convention Center	El Paso	665	Convention Center	94,900	80,000	–	–	14,900	5	–	–	4	351	832	208	10.4
Moody Gardens Hotel, Spa and Convention Center	Galveston	143	Conv. Center / Hotel	92,945	52,780	15,180	15,180	24,985	22	1	433	–	–	–	0	8.2
McAllen Convention Center	McAllen	371	Convention Center	87,272	61,482	10,659	10,659	15,131	12	–	–	5	150	628	126	10.2
Irving Convention Center at Las Colinas	Irving	192	Convention Center	85,459	48,576	26,104	19,264	10,779	12	–	–	3	350	629	210	12.9
Amarillo Civic Center	Amarillo	512	Civic Center	82,178	61,333	20,845	20,845	–	–	–	–	1	226	226	226	3.7
Waco Convention Center	Waco	90	Convention Center	80,309	47,976	13,818	13,818	18,515	13	1	195	4	153	518	130	14.9
Galveston Island Convention Center at The San Luis Resort	Galveston	142	Convention Center	69,800	43,100	15,000	15,000	11,700	11	–	–	4	242	725	181	16.8
Kalahari Resorts & Conventions - Austin	Round Rock, TX	92	Resort	71,796	–	61,936	40,040	9,860	6	1	975	–	–	–	–	–
Lubbock Memorial Civic Center	Lubbock	431	Civic Center	67,334	40,000	14,105	14,105	13,229	14	–	–	3	293	571	190	14.3
Mariott Dallas Allen Hotel & Convention Center	Allen	195	Conv. Center / Hotel	66,600	40,000	12,000	12,000	14,600	15	1	300	1	150	150	150	11.3
The Woodlands Waterway Marriott Hotel & Convention Center	The Woodlands	72	Conv. Center / Hotel	66,532	37,180	22,050	18,000	7,302	14	1	348	1	302	302	302	17.5
Hampton Inn & Suites Dallas-Mesquite	Mesquite	174	Conv. Center / Hotel	57,738	35,250	18,000	18,000	4,488	9	1	160	2	96	169	85	9.3
Wichita Falls Multi-Purpose Events Center	Wichita Falls	289	Event Center	57,270	38,088	–	–	19,182	10	–	–	1	200	200	200	5.3
Ford Arena	Beaumont	169	Arena	56,332	48,600	–	–	7,732	8	–	–	–	–	–	0	0.0
Embassy Suites Frisco Hotel & Convention Center	Frisco	204	Conf. Center / Hotel	60,338	–	42,154	42,154	18,184	27	1	330	7	303	1,072	153	0.0
Hilton DFW Lakes Executive Conference Center	Grapevine	202	Conf. Center / Hotel	53,558	–	23,780	14,400	29,778	31	1	397	5	329	803	161	0.0
The Woodlands Resort & Conference Center	The Woodlands	70	Conf. Center / Resort	52,679	–	26,690	13,430	25,989	23	1	402	–	–	–	0	0.0
Average				84,499	52,507	24,157	18,371	15,336	14	1	225	2	150	325	116	8.1

Source: Various Facilities, Smith Travel Research

Texas A&M University Meeting Facilities

Texas A&M University offers several of Brazos County's largest and highest-quality meeting facilities with extensive amenities. However, these venues are not considered part of the local competitive meeting supply due to their prioritization of student organizations. Meeting planners have reported challenges in working with the university, citing last-minute scheduling changes to accommodate university needs.

Texas A&M University's facilities include the following:

- Kyle Field
- Memorial Student Center
- Reed Arena
- Annenberg Presidential Conference Center
- Olsen Field at Blue Bell Park
- Texas A&M Hotel and Conference Center
 - Unlike other university-affiliated facilities, the Texas A&M Hotel and Conference Center operates as a for-profit commercial venture and is included in the competitive supply



Texas A&M University Meeting Facilities Cont.

In 2013, a 30-year Preferred Access Agreement was signed between Brazos County, Texas A&M University, College Station's CVB, and the City of College Station to secure preferred access to Texas A&M University facilities for promoting tourism and supporting the convention and hotel industry in Brazos County.

- As part of this, the CVB would receive preferred rates to facilitate group programming at university facilities.
- \$36 million in hotel tax funding was allocated to Texas A&M University for facility access, with \$22 million contributed by Brazos County and an estimated \$14 million from the City of College Station. All parties acknowledged that these funds would support the renovation of Kyle Field.
- Despite this agreement, third-party users remain a low priority for many of the university's facilities. **Stakeholders have reaffirmed this, citing challenges in securing event space due to scheduling conflicts with university organizations.**

Annenberg Presidential Conference Center's Order of Priority (example):

1. George Bush Presidential Library Foundation
2. Bush School of Government and Public Service (including Institutes)
3. George H.W. Bush Presidential Library and Museum and Education Department
4. Texas A&M University-recognized academic departments as predetermined by the Office of the Provost
5. Recognized student organizations of Texas A&M
6. Agencies within the Texas A&M University System
7. Affiliated Texas A&M organizations (e.g., the Association of Former Students, Texas A&M Development Foundation, and Texas A&M Research Foundation).
8. Non-university affiliates (approved by the director)

Texas A&M Meeting Facilities Cont.

Kyle Field



Total Function Space: 87,913 SF

Home to the Texas A&M Aggies, Kyle Field is one of the largest college football stadiums in the nation. In addition to accommodating more than 100,000 fans, the facility can host events ranging from a 10-person business meeting to a 1,000-person gala. Its largest space, the Ford Hall of Champions, offers more than 32,000 square feet of function space. The stadium features eight distinct meeting spaces, not including multiple reception areas.

Memorial Student Center



Total Function Space: 38,527 SF

The Memorial Student Center (MSC) serves as both a gathering place for students and a memorial honoring Aggies who lost their lives in the World Wars. Additionally, the MSC offers a variety of rentable event spaces for small meetings, large conferences, and celebratory events. These include the 15,800-square-foot Bethancourt Grand Ballroom, which can accommodate up to 1,700 guests, as well as 27 other meeting rooms.

Reed Arena



Total Function Space: 30,600 SF

Reed Arena serves as the home court for Texas A&M's men's and women's basketball teams. The 12,989-seat arena offers 30,600 square feet of function space, excluding its flexible 24,800-square-foot arena floor where graduations are held. The venue includes two newly renovated ballrooms and seven meeting rooms.

Texas A&M Meeting Facilities Cont.

Texas A&M Hotel and Conference Center



Total Function Space: 20,453 SF

The Texas A&M Hotel and Conference Center provides accommodations for current and former students, their parents, wedding celebrations, meetings and conferences, and visitors conducting business with the university. The conference center features an 8,200-square-foot ballroom, along with 21 boardrooms and meeting rooms. The facility offers state-of-the-art technology and in-house catering.

Annenberg Presidential Conference Center



Total Function Space: 11,100 SF

The Annenberg Presidential Conference Center is part of the George Bush Presidential Library Complex, which houses the George H.W. Bush Presidential Library and Museum. The conference center features more than 11,000 square feet of banquet space, along with two large auditoriums used for distinguished lectures, panels, performances, graduations, and award ceremonies.

Olsen Field at Blue Bell Park



Total Function Space: 5,478 SF

Olsen Field at Blue Bell Park is home to the Texas A&M baseball program. The facility features the premier Cox Diamond Club, a 5,478-square-foot event space with a full-service bar and diverse catering options. On non-game days, this space can be rented for wedding receptions, corporate events, banquets, luncheons, seminars, and other special occasions.

Texas A&M Hotel and Conference Center

Location: College Station, TX

Opened: 2018

Cost: \$134 million

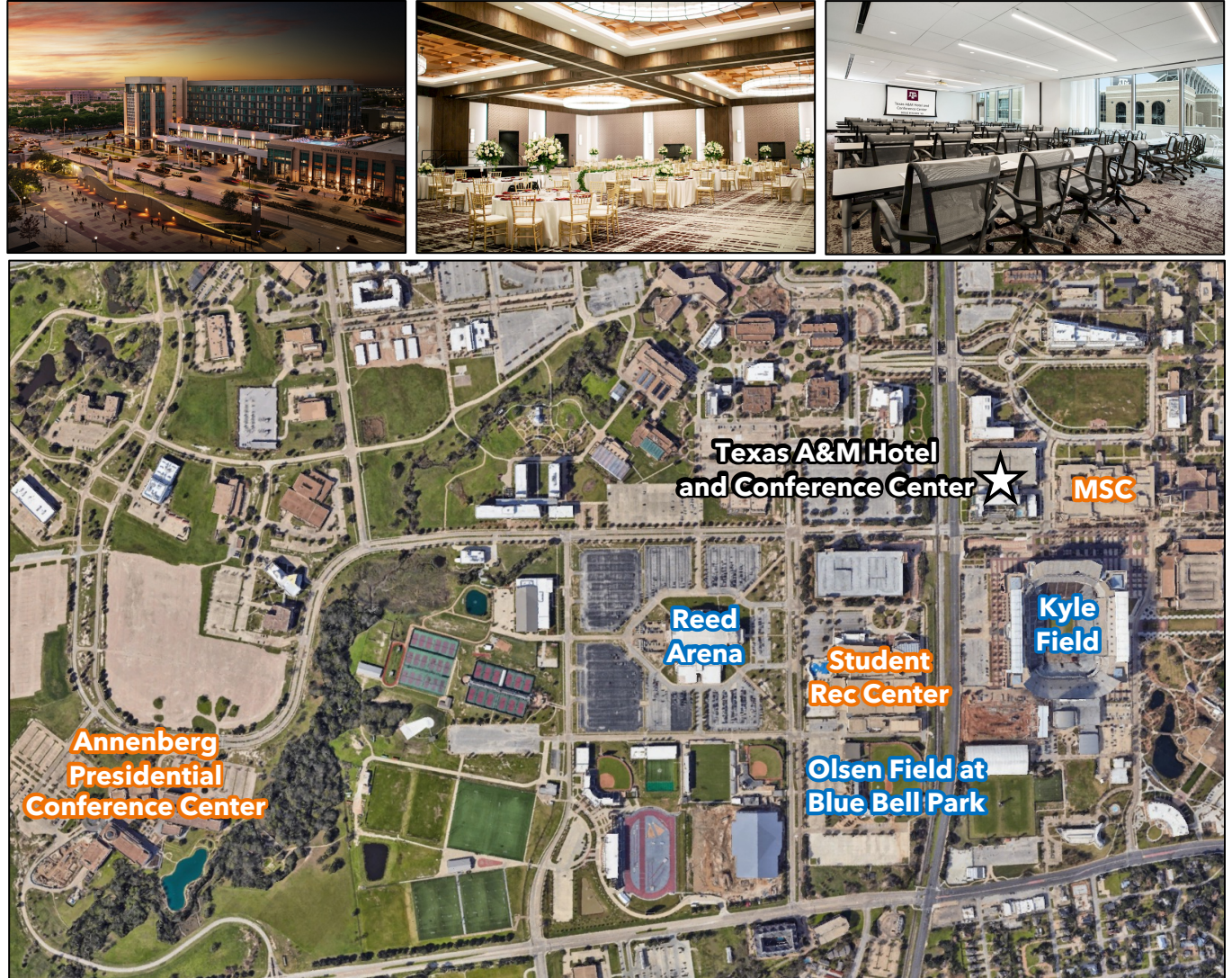
Hotel Rooms: 247

Function Space: 20,453 SF

Operator: Benchmark Pyramid

The Texas A&M Hotel and Conference Center is located in the heart of Texas A&M's historic campus, across from Kyle Field and the Memorial Student Center (MSC). Developed through a public-private partnership (P3), the property is the only luxury hospitality offering in the market.

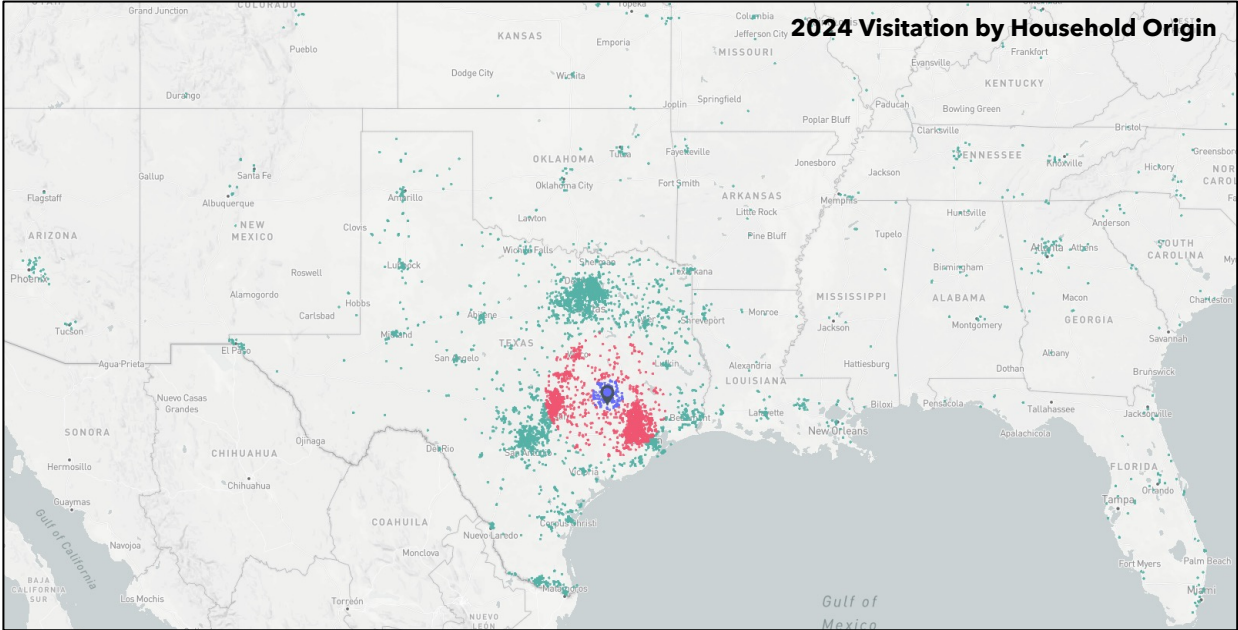
The 250,000-square-foot hotel features nearly 250 rooms and more than 20,000 square feet of function space. It provides accommodations for current and former students, their families, wedding celebrations, meetings and conferences, and visitors conducting business with the university.



Texas A&M Hotel and Conference Center - Visitation (2024)

Key Takeaways

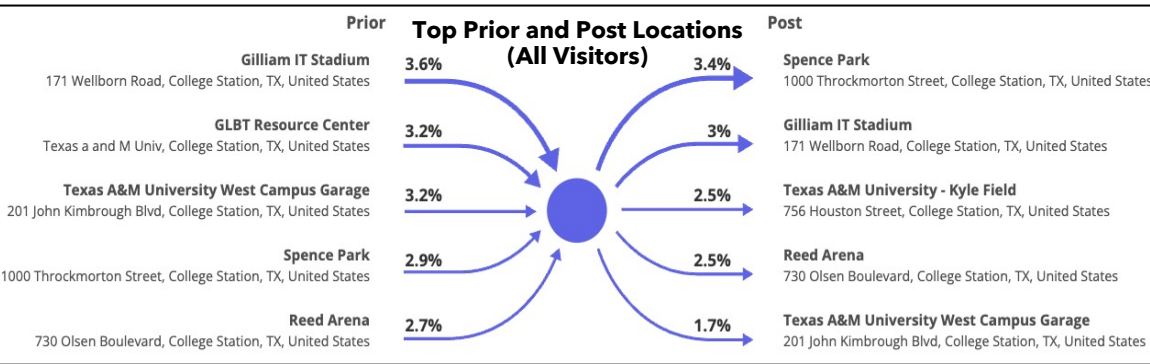
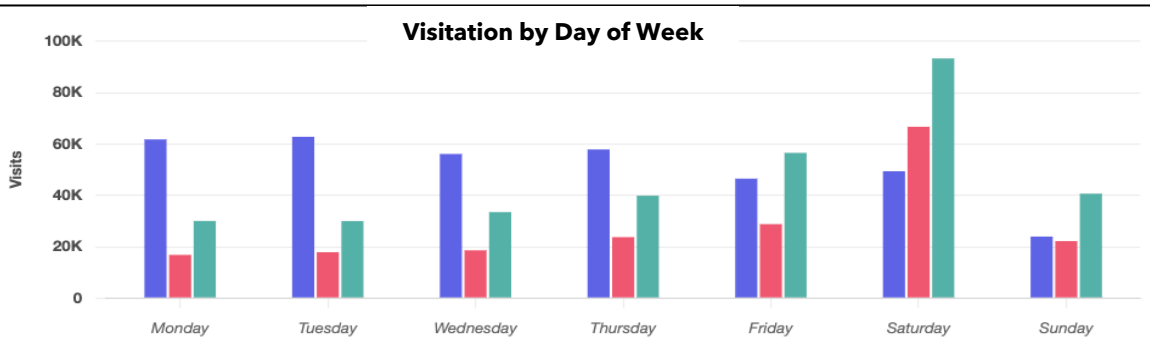
- Most of the venue's long-distance visitors are within driving distance, likely due to limited national air access
- Long-distance visitors primarily attend the venue on weekends, reflecting strong demand for transient travel, likely driven by the university's home football games
- The majority of visits to the hotel and conference center originate within 25 miles, suggesting high usage of the meeting space by university-affiliated groups



Texas A&M Hotel & Conference Center (College Station, TX) - Total Visitation
January 1, 2024 - December 31, 2024

Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	358,627	40.9%	85,675	28.3%	4.19
Regional & Long Distance - Over 25 miles and Less Than 100 miles	194,816	22.2%	88,699	29.3%	2.20
Long Distance only - Over 100 miles	324,068	36.9%	128,554	42.4%	2.52
Total Visits	877,511	100.0%	302,928	100.0%	2.90

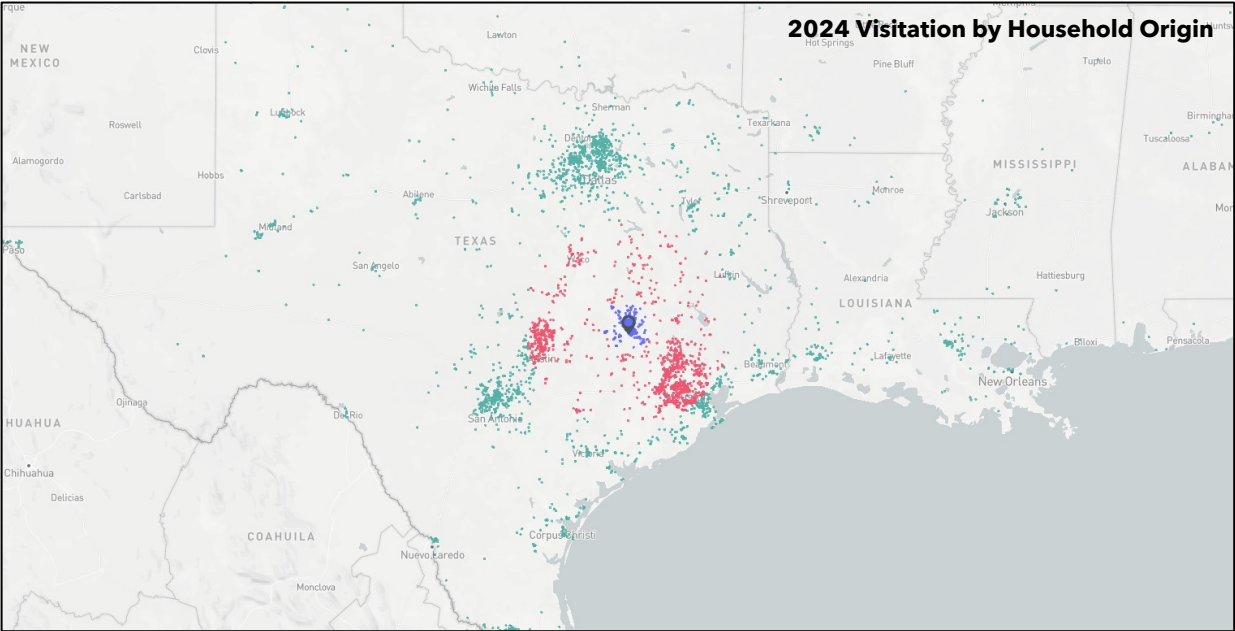
Source: Placer.ai



Hilton College Station & Conference Center – Visitation (2024)

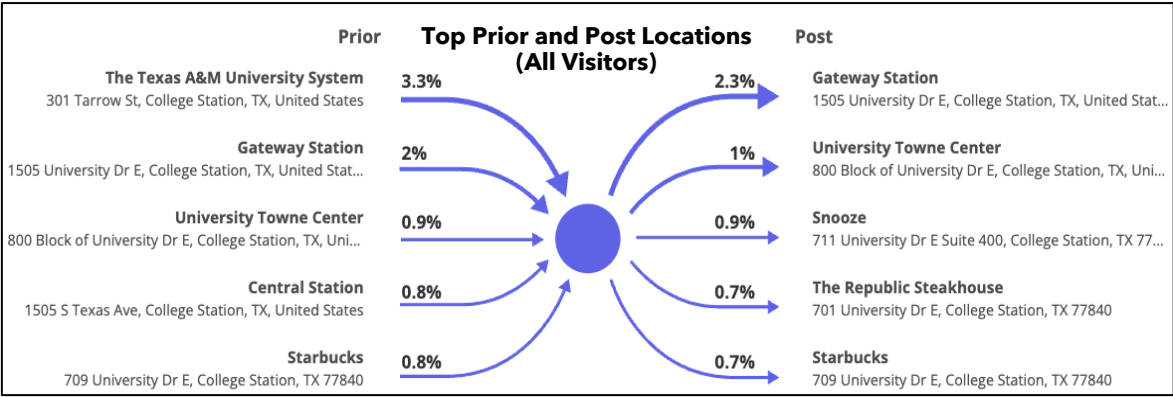
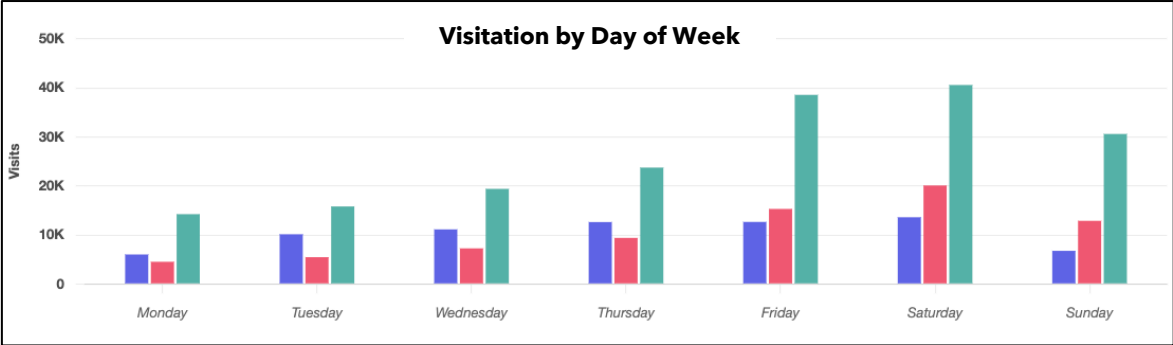
Key Takeaways:

- Most of the venue’s long-distance visitors are within driving distance, likely due to limited national air access
- Long-distance visitors primarily visit the hotel on weekends, reflecting strong demand for transient travel, likely driven by the Texas A&M football schedule and regional tournaments
- The majority of visits to the Hotel and Conference Center arrive from the Texas A&M campus, reflecting the significant usage by both students and employees of the university



Hilton College Station & Conference Center (College Station, TX) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	72,997	22.0%	30,878	25.5%	2.36
Regional Distance - Over 25 miles and Less Than 100 miles	75,006	22.7%	30,505	25.2%	2.46
Long Distance only - Over 100+ miles	183,081	55.3%	59,563	49.2%	3.07
Total Visits	331,084	100.0%	120,946	100.0%	2.74

Source: Placer.ai



Regional Development Pipeline

The Board of Directors of the East Montgomery County Improvement District (EMCID) has announced plans for a proposed 210,000-square-foot convention center in the Valley Ranch Town Center's Entertainment District in New Caney. New Caney is located approximately 90 miles southeast of College Station in the Houston metropolitan area.

The facility will feature a 55,000-square-foot exhibit/banquet hall, close to 20,000 square feet of breakout meeting space, pre-function areas, and back-of-house facilities, along with an 813-space parking structure. The site is designed to enhance the area's retail, dining, and entertainment offerings, catering to both residents and the business community.

Due to its proximity to downtown Houston, the project aims to position itself as a premier destination for corporate events, trade shows, local and regional youth sporting events, consumer shows, galas, wedding receptions, graduations, proms, and other private events.



Meeting Planner Takeaways

Hunden interviewed more than 20 meeting planners, state associations, convention center general managers, and other relevant stakeholders to gain insights into programming best practices and successful business strategies for mid-size convention center developments. The following key implications were drawn:

- **Event Space Requirements:** Event organizers increasingly require a minimum 500-seat ballroom for larger gatherings, along with multiple breakout rooms for educational and association-focused events. Trade shows and conferences typically need 50,000 to 75,000 square feet of exhibit space and 25,000 to 55,000 square feet of ballroom space. All meeting types have a high demand for fast, complimentary Wi-Fi (minimum 10GB) and on-site AV/tech support.
- **Hotel and Lodging Needs:** Meeting planners prefer one to two main hotels to consolidate attendees, with peak room night demand typically ranging from 250 to 450 rooms. While connected hotels are preferred for convenience, walkable hotels are acceptable for some events. Many respondents emphasized the importance of hotel-based meeting spaces with additional capacity for sessions and breakout rooms. Additionally, many events require tiered room options, ranging from executive suites to more budget-friendly accommodations.
- **Location Considerations:** While not a deal-breaker, walkable amenities such as restaurants, bars, and attractions are highly desirable, as attendees often seek opportunities to explore the destination during downtime. Accessibility needs vary by group, with some attendees willing to drive, while others require strong airlift infrastructure to justify the location.
- **College Station's Future:** Many stakeholders view College Station as a promising market, but its existing infrastructure – particularly convention space and hotel capacity – requires expansion. A new, larger convention center and additional hotels would significantly enhance the city's attractiveness as a meetings and events destination.
- **Texas A&M Meetings Facilities:** While College Station offers several upscale meeting and event venues through Texas A&M University, these facilities are largely unavailable for third-party use. In the case of corporate or association utilization, last-minute scheduling changes have sometimes occurred, and working directly with university facility planners has posed various challenges. Texas A&M prioritizes athletics in its group scheduling, making it difficult for outside organizations to plan events, especially when requiring long-term advance bookings.

Meeting Planner Takeaways Cont.

State Associations

- Associations tend to be more flexible with hotel requirements and may have attendees share rooms.
- Association-focused events typically require four to six breakout rooms per session.
- College Station's central location in Texas and easy drive-in access make it an attractive option for mid-sized events and regional associations.
- Cost-effectiveness and flexibility are key priorities for associations, favoring mid-sized venues with strong on-site AV support and ample breakout room options.
- Exhibit space is considered an add-on to users; exhibit space is often overdone, and meeting rooms and ballrooms tend to be underserved.

Corporate Business

- Corporate meeting planners prefer 80- to 100-percent single-occupancy rooms, with tiered options ranging from executive suites to budget-friendly accommodations.
- A persistent challenge for corporate groups is College Station's limited airlift. The lack of direct flights and convenient airport access remains a significant barrier to attracting corporate events.
- Corporate events – particularly in the pharmaceutical, medical, tech, and financial industries – require larger, tech-equipped venues with extensive meeting spaces.

Additional Uses: Entertainment/Sports Market Analysis

Live Entertainment Industry Trends

\$17B

Music Events' projected revenue in 2024

9.4%

Increase in ticket pricing since 2023

14.9%

Decrease in average tickets sold since 2023

8.7%

Increase in total gross revenue for top 100 global tours



Progress Slowing

Post-pandemic progress is slowing down. Major industry names are taking risks by inflating ticket prices and testing fans' spending limits. Reports show empty seats and lower turnouts, and music festivals that once sold out in minutes are now struggling to do so this season.



New Technology

Immersive experiences are becoming more common, with the Las Vegas Sphere setting a new standard to differentiate live events from at-home entertainment. Concerts are using advanced technology to create enhanced visual experiences for audiences.



Social Media Marketing

Social media and streaming have made it easier to discover artists, boosting demand for live music. Platforms like TikTok, Facebook Watch, and IGTV allow entertainers to connect with audiences and offer fans new ways to experience live events.



Exclusive Events

While large-scale festivals remain popular, demand is increasing for smaller concerts that offer a personal, immersive experience, allowing attendees to connect with artists on a deeper level. Artists recognize the value of these performances and are incorporating them into tour schedules.

Source: Statista, Live Nation, Variety

Regional Entertainment Market Overview

Pollstar compiled data between January 2022 and December 2022 to publish their Concert Market Rankings report. College Station is uniquely located between major concert markets. While difficult to attract headlining shows, College Station can serve as a midway point between the major markets and host mid-sized acts within a new event facility.

- The Dallas-Fort Worth market ranked **8th overall** in 2022 with a reported \$206.8 million in ticket sales (2.25 million tickets sold).
- The Houston market ranked **15th overall** in reported gross dollars of ticket sales. Over the period, there was a reported \$138.2 million in ticket sales (1.37 million tickets sold).
- The Austin market ranked **22nd overall** in 2022 with a reported \$91.5 million in ticket sales (785,333 tickets sold)

A conversation with Live Nation highlighted College Station's potential role in the regional routing landscape, particularly from Houston. A multipurpose facility with a 2,000- to 5,000-capacity could attract college-targeted acts. The region's entertainment and concert market is expanding rapidly.



College Station

Entertainment Venues: Local Market Overview

Hunden identified relevant and competitive entertainment venues with the potential to host ticketed events.

Bryan-College Station has a limited supply of high-quality entertainment venues capable of hosting large events or concerts outside of Texas A&M University’s facilities. Historically, Kyle Field and Reed Arena have attracted major acts. From Elvis to George Strait, these venues serve as a tour stop for artists performing in other major Texas markets. Notably, Rudder Auditorium, a smaller entertainment facility, does not currently route regular entertainment acts that could drive interest from Texas A&M students. A gap exists in the entertainment market for a well-programmed, mid-sized facility that can drive acts targeting students.

Local Music & Entertainment Venue Supply							
Venue	Concert Capacity	Venue Type	Location	Estimated 2024 Events	Average Attendance	Average Occupancy %	Average Ticket Price
Kyle Field	110,905	Stadium	College Station, TX	1	110,905	100%	\$231.65
Reed Arena	13,000	Arena	College Station, TX	0	4,161	63%	\$30.79
Wolf Pen Creek Amphitheater	7,500	Auditorium/Theater	College Station, TX	1	738	82%	\$29.46
Rudder Auditorium	2,500	Auditorium/Theater	College Station, TX	2	1,758	68%	\$40.11
Central Baptist Church	1,400	Auditorium/Theater	College Station, TX	0	1,697	61%	\$25.98
The Tap	600	Club	College Station, TX	3	498	84%	\$16.78
Grand Stafford Theater	400	Auditorium/Theater	Bryan, TX	0	281	75%	\$12.68
Palace Theater	400	Auditorium/Theater	Bryan, TX	–	–	–	–
Average	17,088			1	17,148	76%	\$55.35

Source: Pollstar

* Some venues do not report all events. True event data may be skewed or underestimated.

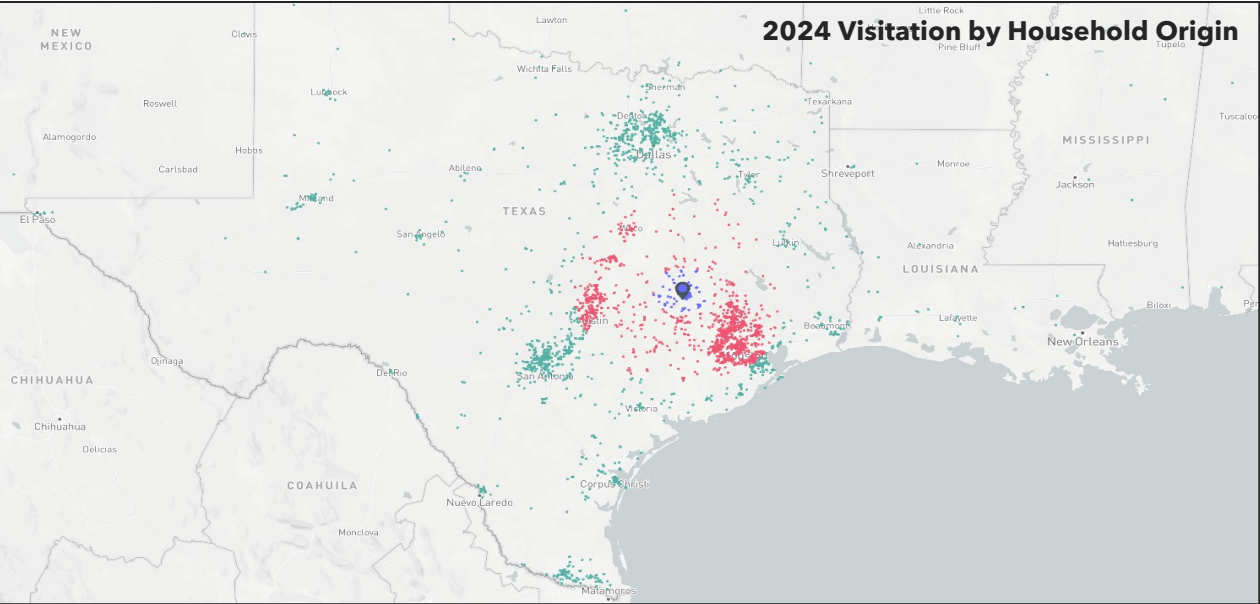


George Strait Concert

Texas A&M University's Kyle Field

On June 15, 2024, George Strait and Texas A&M University made American music history by breaking the record for the largest U.S. ticketed show. The event drew 110,905 fans to Kyle Field, attracting visitors from across the state and country, with nearly 45 percent traveling more than 100 miles.

According to a June 2024 economic impact report, gross ticket sales for the concert totaled \$27.8 million, while net revenue exceeded \$33 million. Additionally, in June alone, College Station recorded \$221.7 million in taxable sales, \$11 million in mixed beverage sales, and \$6.7 million in hotel revenues.



George Strait Concert (College Station, TX) - Total Visitation					
Saturday, June 15, 2024					
Visitor Origins by Distance from Stadium (Colors correspond to charts & maps)	Total Visits		Total Unique Visitors		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Visitors	Percent of Total Visitors	
Locals - Within 25 miles	24,838	15.0%	25,217	15.3%	0.98
Regional Distance - Over 25 miles & Less Than 100 miles	66,485	40.2%	65,988	39.9%	1.01
Long Distance - Over 100+ miles	73,984	44.8%	74,061	44.8%	1.00
Total Visits	165,307	100.0%	165,266	100.0%	1.00
Source: Placer.ai					

Legends Event Center

Location: Bryan, TX

Owner/Operator: City of Bryan/Sports Facilities Companies

Opened/Cost: 2022/\$41 million

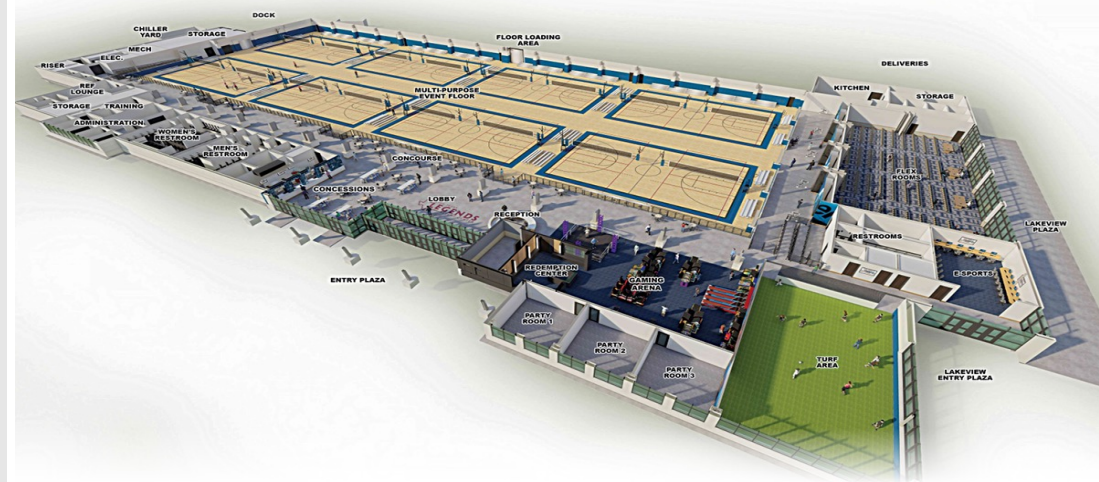
Sports Features:

- Eight basketball courts/16 indoor volleyball courts/four outdoor sand volleyball courts
- Turf field for special programming and training

Notes:

Legends Event Center is a 122,000-square-foot facility. It includes eight basketball courts, which can be converted into 16 volleyball courts, four outdoor sand volleyball courts, a 5,500-square-foot banquet room, concessions, a kitchen for catering companies, and a turf area for special events. Additionally, there is a gaming arena and an e-sports lounge. The complex hosts a variety of local and regional sports tournaments, leagues, camps, clinics, practices, trade shows, markets, and other special events.

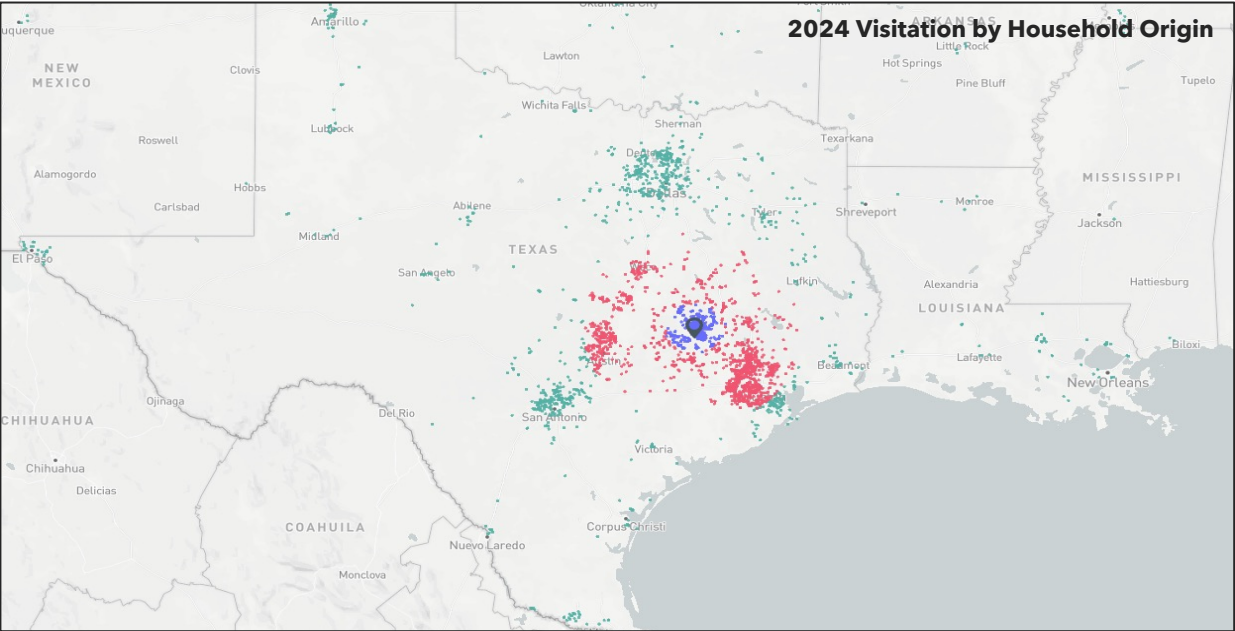
Legends Event Center has become an anchor for Bryan, drawing visitors from all over the U.S. who generate local sales tax as they stay, eat, and shop in local stores. The center is a part of a larger master plan to improve Bryan's economic vitality, serving the community not only through local sports availability, but also through significant economic impact. Hunden interviewed management and discovered that Texas A&M utilizes the facility often for special events such as banquets and galas, which contributed approximately 15 percent of their overall business.



Legends Event Center - Visitation (2024)

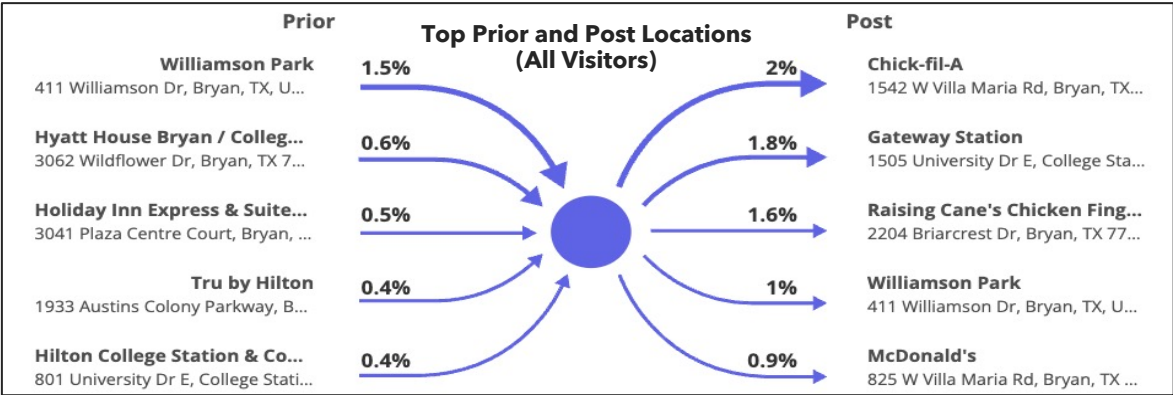
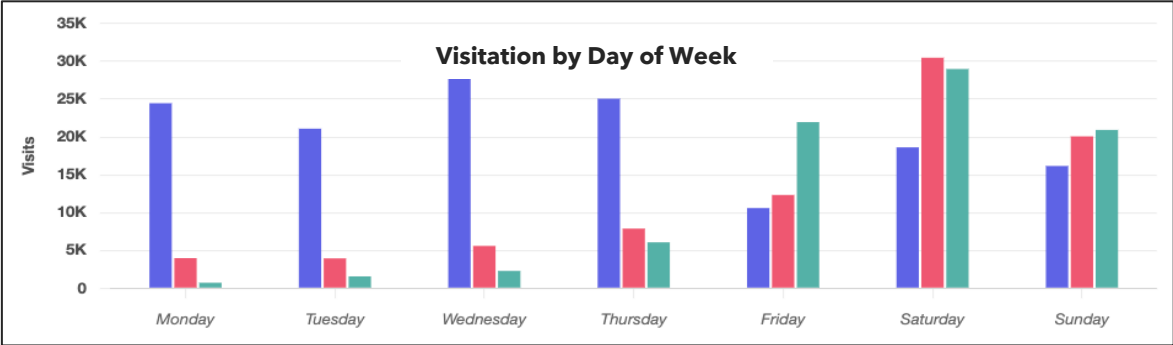
Key Takeaways

- Most of the venue’s long-distance visitors are within driving distance, likely due to limited national air access
- Long-distance visitors primarily attend the venue on weekends, reflecting strong demand for transient travel, likely driven by the regional tournaments
- The majority of visits to the event center occur during the week and originate within 25 miles, suggesting high usage of the sport amenities for local team practices



Legends Event Center (Bryan, TX) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	217,300	48.9%	55,600	34.0%	3.91
Regional & Long Distance - Over 25 miles and Less Than 100 miles	117,300	26.4%	54,300	33.2%	2.16
Long Distance only - Over 100 miles	109,500	24.7%	53,700	32.8%	2.04
Total Visits	444,100	100.0%	163,600	100.0%	2.71

Source: Placer.ai



Event Organizers Takeaways

Hunden interviewed event planners from national sports leagues and live music organizations to gain insights into programming best practices and strategies for designing a flexible convention center capable of attracting such events. The following key takeaways were identified:

Sport Tournaments

- Large national sports leagues rotate host cities annually, selecting both large and small markets.
- National events that attract athletes from across the country require strong airlift accessibility, while regional and local leagues are more willing to drive long distances
- Some sporting events have highly specific facility requirements – designing a versatile exhibit hall will enhance College Station’s ability to secure major events
- Cost-effectiveness is a key factor for event organizers; leveraging Texas’ available sports grants will be critical in attracting groups

Entertainment

- The ideal capacity for an entertainment venue in a college town ranges from 2,000 to 2,500 attendees
- Texas’s live entertainment industry is rapidly growing, particularly in the concert sector
- College Station’s proximity to Houston presents an opportunity for smaller acts performing in Houston to consider College Station as an additional stop
- Concerts should be scheduled during the academic year to capitalize on the university’s student population
- Events featuring country, electronic dance music (EDM), comedians, or boutique festivals would likely perform exceptionally well with college audiences

Implications

Convention Center, Meetings & Entertainment Market Analysis

State Association Demand

Rotating state associations have shown interest in College Station and would consider the city as a host destination if a new convention center were developed. However, College Station has not fully leveraged this demand, as only 37 association events were reported in the market between 2022 and 2024.

Limited Supply

College Station lacks high-quality meeting space necessary to attract regional events. Inadequate hotel and meeting space was the most common reason for lost business between 2022 and 2024. Texas A&M University's facilities prioritize university-affiliated organizations and are generally not considered accessible by meeting planners.

Flexible Space

A new convention center should prioritize ballroom space and breakout rooms to attract local and regional meetings. However, incorporating a versatile exhibit hall would allow the venue to host sports tournaments and entertainment events, further expanding its market reach.





03

Hotel & Walkable Package Analysis

Trends & National Market

Hotel Industry Trends

REVENUE GROWTH

As of 2024, U.S. RevPAR is 16 percent above 2019 levels, driven primarily by price growth, with ADR now 21 percent higher than in 2019

DEMAND FOR QUALITY

Luxury and Upper Upscale hotels have experienced increased room demand, meanwhile economy hotels have experienced a decline in RevPAR and room demand

BRANDED HOTELS

Since 2019, major branded hotel groups have seen double-digit growth in market share, driven by operational efficiencies, loyalty programs, and acquisitions of independent hotels

LEISURE & GROUP DYNAMICS

Leisure travelers are increasingly drawn to international destinations due to the strong dollar and pent-up demand following Covid-19. However, group demand for domestic high-end hotels also continues to grow

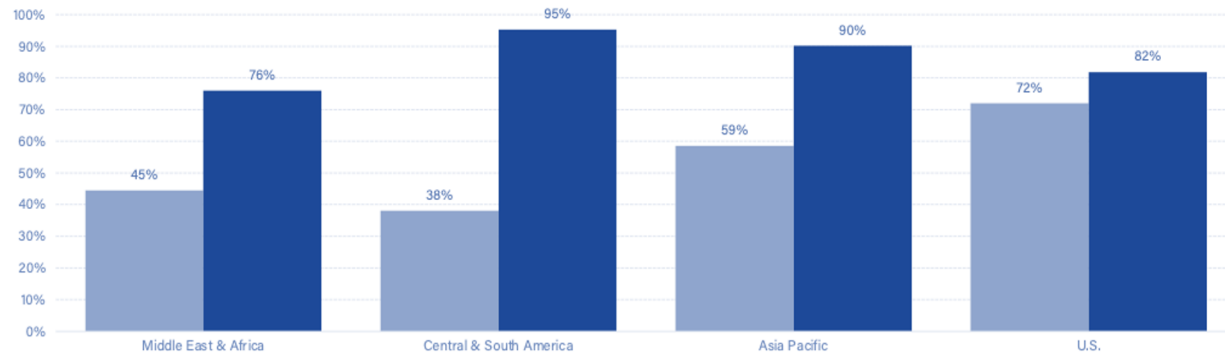
Global Hotel Revenues (\$ Billions)

Global hotel revenues have exceeded 2019 levels for the first time since the pandemic.



Hotels: Branded Existing Supply vs Future Pipeline

Brands as % of total current supply Brands as % of total future pipeline



Hotel Industry Trends Cont.

- Leisure travelers have driven ADR increases of around 20 percent since 2019. However, some markets that previously performed well by attracting leisure travelers are now experiencing slower growth due to increased overseas travel.
- Group travel RevPAR rose by 6.9 percent, driven by a 4.1-percent increase in ADR. Lower office occupancy has led companies to hold group events to strengthen team cohesion, often utilizing full-service hotels with meeting spaces.
- High interest rates have stabilized the number of rooms under construction, reducing the pipeline from pre-pandemic levels.

Source: Costar



Trends of Note

Brands Multiply

Major hotel brands dominate the market with advanced strategies, leaving independent hotels to rely on pricing to compete.

Companies Consolidate

The Marriott-Starwood merger highlights the trend of hotel companies consolidating to improve scale, market power, and leverage current market dynamics.

Boutique Brands

Major hotel brands are expanding into the independent boutique hotel market by creating “soft brands” that benefit from the main brand’s resources, like Marriott’s Autograph Collection.

Shared Spaces and Rentals

Airbnb and similar platforms like VRBO and HomeAway have transformed the lodging industry by adding inventory to expensive hotel markets, allowing residents in high-cost areas to rent their homes to travelers, making it a viable option for both parties.

Work from Anywhere

The trend of lifestyle hotels targeting Millennials and Gen Z features active social spaces, minimalist rooms, and retro-modern designs, helping mitigate construction and labor costs, while accommodating the “work-from-anywhere” concept, popular among younger professionals.

Micro Hotels

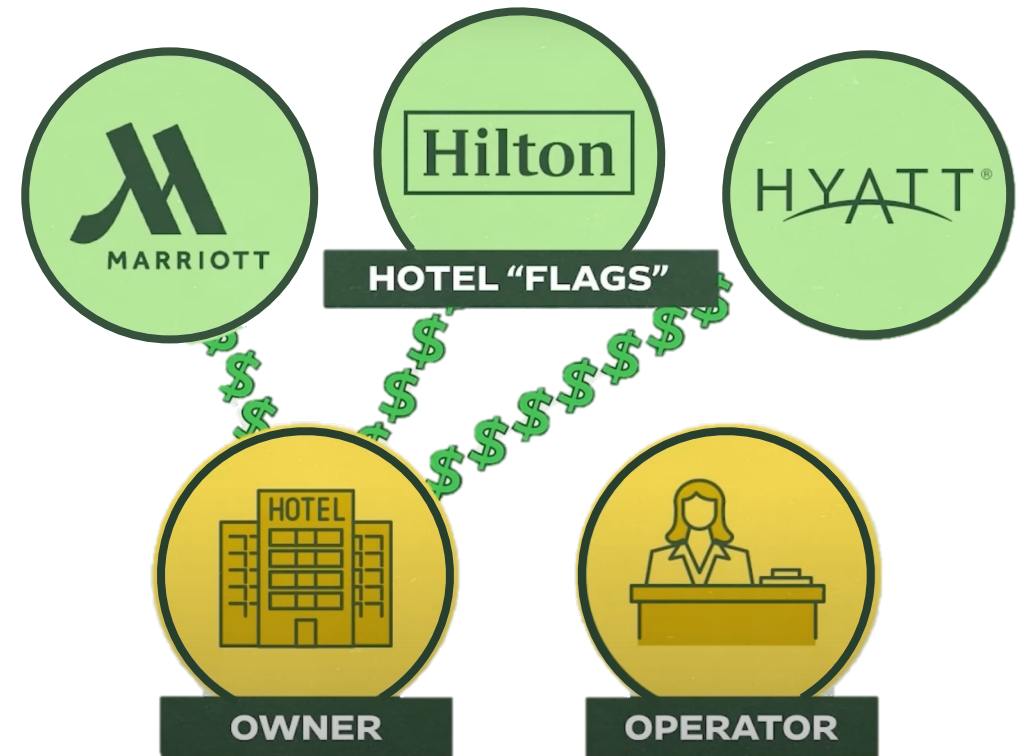
Micro hotel rooms, like Marriott’s Moxy brand, are half the size of traditional rooms, designed for efficiency and essentials due to high real estate costs in urban areas, featuring extensive shared spaces and appealing to millennials who prioritize experiences over room size.



Hotel Ownership Trends

Hotel Franchises vs. Owner/Operators

- Marriott, Hilton, and Hyatt moved to franchising to avoid financial risks associated with real estate and to scale up their companies much faster. Each now owns less than two percent of their properties.
- Companies like MCR own and operate the hotels and pay a 5- to 15-percent franchise fee to larger hotel brands to use its “flags” for recognition.
- In addition to the profile that comes with the “flag,” those brands also provide operators with data on lobby design, suggested amenities, and strategies to maximize nightly room revenue.



Local Hotel Market

Local Hotel Performance

Based on 2023 data from Smith Travel Research, College Station and Bryan have a combined total of 6,175 hotel rooms available per night, including three properties currently under construction.

The Bryan-College Station market ranks ninth in RevPAR among 13 comparable markets in Texas, with occupancy, ADR, RevPAR, supply, and demand all increasing from the previous year.

The majority of hotels in these markets are classified as Upper Midscale and Upscale properties, at 24 percent and 20 percent, respectively.

City of College Station Performance (2023):

12-Month Key Market Indicators:		Development Pipeline:	
Occupancy	53.1%	Total Room Supply	4,458 Rooms
ADR	\$127.62	Total Properties	46 Hotels
YOY ADR Growth	4.04%	Delivered Past 2 Yrs	0 Rooms
RevPAR	\$67.79	Under Construction	160 Rooms

City of Bryan Performance (2023):

12-Month Key Market Indicators:		Development Pipeline:	
Occupancy	60.7%	Total Room Supply	1,717 Rooms
ADR	\$98.05	Total Properties	24 Hotels
YOY ADR Growth	3.70%	Delivered Past 2 Yrs	112 Rooms
RevPAR	\$59.55	Under Construction	139 Rooms

Local Hotel Environment

Based on raw data from Smith Travel Research, there are 6,175 hotel rooms available per night in the Bryan-College Station combined market, including one 160-room property currently under construction.

The Texas A&M Hotel and Conference Center is the only luxury property in the market, with the majority of hotel supply classified as Upper Midscale and Upscale.

The average property age is 16 years, reflecting the introduction of higher-end hotels to the College Station market in recent years.

Lodging Summary Bryan-College Station, TX						
Chainscale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg Year Open / Renovated	Avg Age (Years)
Luxury	247	4%	1	247	Jun-20	05 Years
Upper Upscale	997	16%	6	166	Jan-14	11 Years
Upscale	1,233	20%	11	112	Jul-13	12 Years
Upper Midscale	1,471	24%	15	98	Nov-06	18 Years
Midscale	751	12%	11	68	Nov-15	09 Years
Economy	1,056	17%	12	88	Dec-10	14 Years
Independent	420	7%	7	60	Jan-81	44 Years
Total/Average	6,175	100%	63	120	Dec-08	16 Years

Source: Smith Travel Research

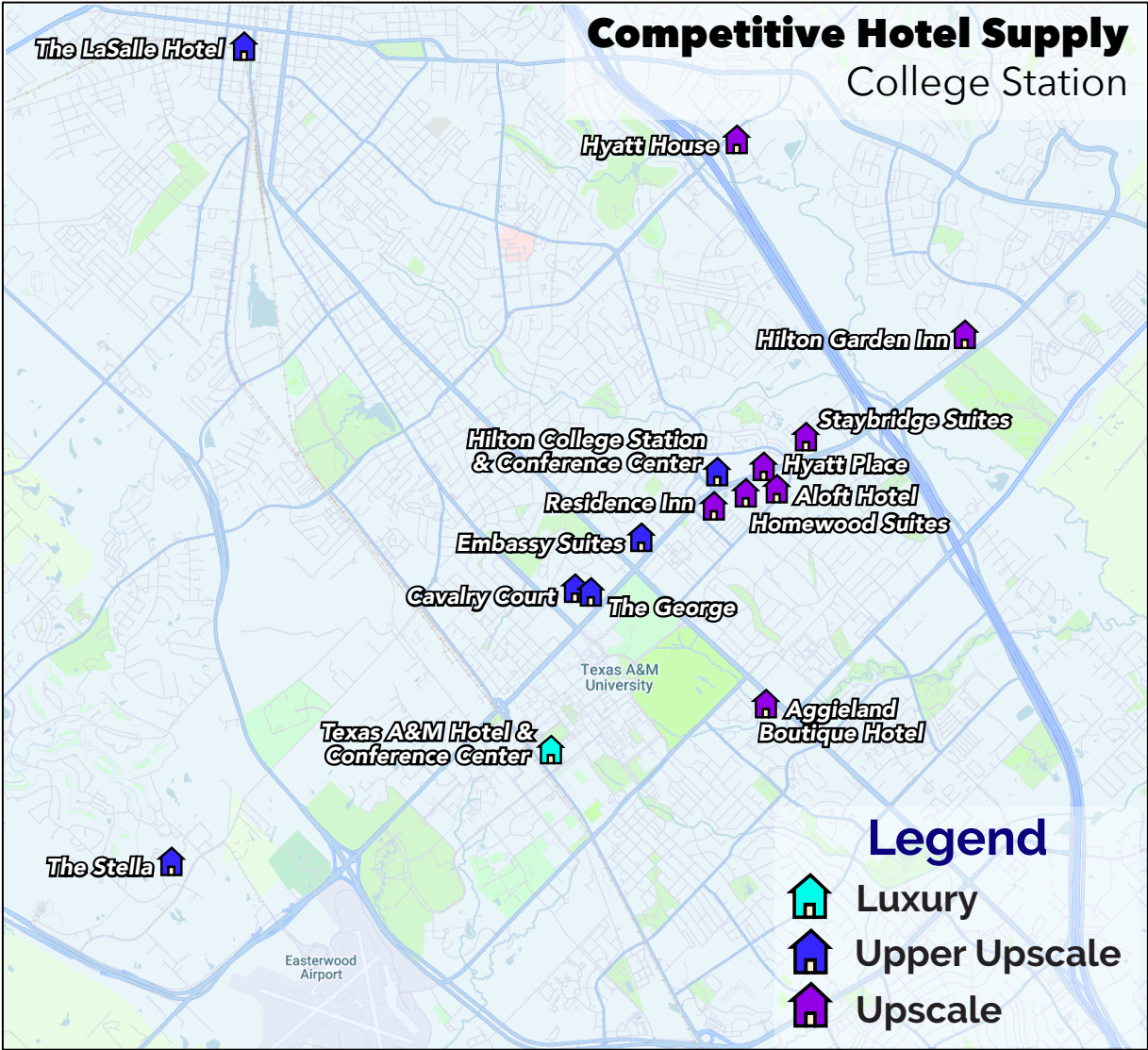
Competitive Hotel Supply Analysis

Hunden analyzed 15 hotels within the selected competitive set, based on quality, inclusion of meeting space, and targeting of group business.

The Hilton College Station & Conference Center has the largest room count in the competitive set, accounting for 14.4 percent of total rooms. Most properties in the set are located near University Drive, highlighting the concentration of activity around Texas A&M University's campus and its strong demand for hospitality services.

Relevant Local Hotel Supply List College Station , TX				
Property Name	Rooms	% Rooms	Scale	Date Opened
Hilton College Station & Conference Center	301	14.4%	Upper Upscale	Jun-85
Texas A&M Hotel and Conference Center	247	11.8%	Luxury	Aug-18
The Stella Hotel, Autograph Collection	176	8.4%	Upper Upscale	Apr-17
Aggieland Boutique Hotel	166	7.9%	Upscale	Oct-17
The George	162	7.7%	Upper Upscale	Sep-17
Embassy Suites by Hilton College Station	162	7.7%	Upper Upscale	Oct-17
Cavalry Court	141	6.7%	Upper Upscale	Nov-16
Hilton Garden Inn College Station	119	5.7%	Upscale	Nov-13
Hyatt House Bryan College Station	112	5.4%	Upscale	Mar-22
aloft Hotel College Station	105	5.0%	Upscale	Sep-15
Hyatt Place College Station	91	4.3%	Upscale	Sep-05
Staybridge Suites College Station	88	4.2%	Upscale	Sep-14
Residence Inn Bryan College Station	84	4.0%	Upscale	Oct-08
Homewood Suites by Hilton College Station	83	4.0%	Upscale	Dec-04
The LaSalle Hotel, Bryan College Station, A Tribute Portfolio Hotel	55	2.6%	Upper Upscale	Jun-28
Average/Total	2092	100%	15 Hotels	Jan-07

Source: Smith Travel Research



Competitive Set Performance

Hunden analyzed data from Smith Travel Research to assess the competitive set’s performance from January 2016 through December 2024.

The average room supply has more than doubled since 2016, reflecting a historical surge in hotel development within the local market. Recent occupancy rates have been notably high, exceeding pre-pandemic levels by more than seven percent. Additionally, the Average Daily Rate (ADR) has shown consistent growth, particularly since 2020. As of December, year-to-date Revenue per Available Room (RevPAR) has increased significantly from 2023, driven by higher ADR and occupancy levels.

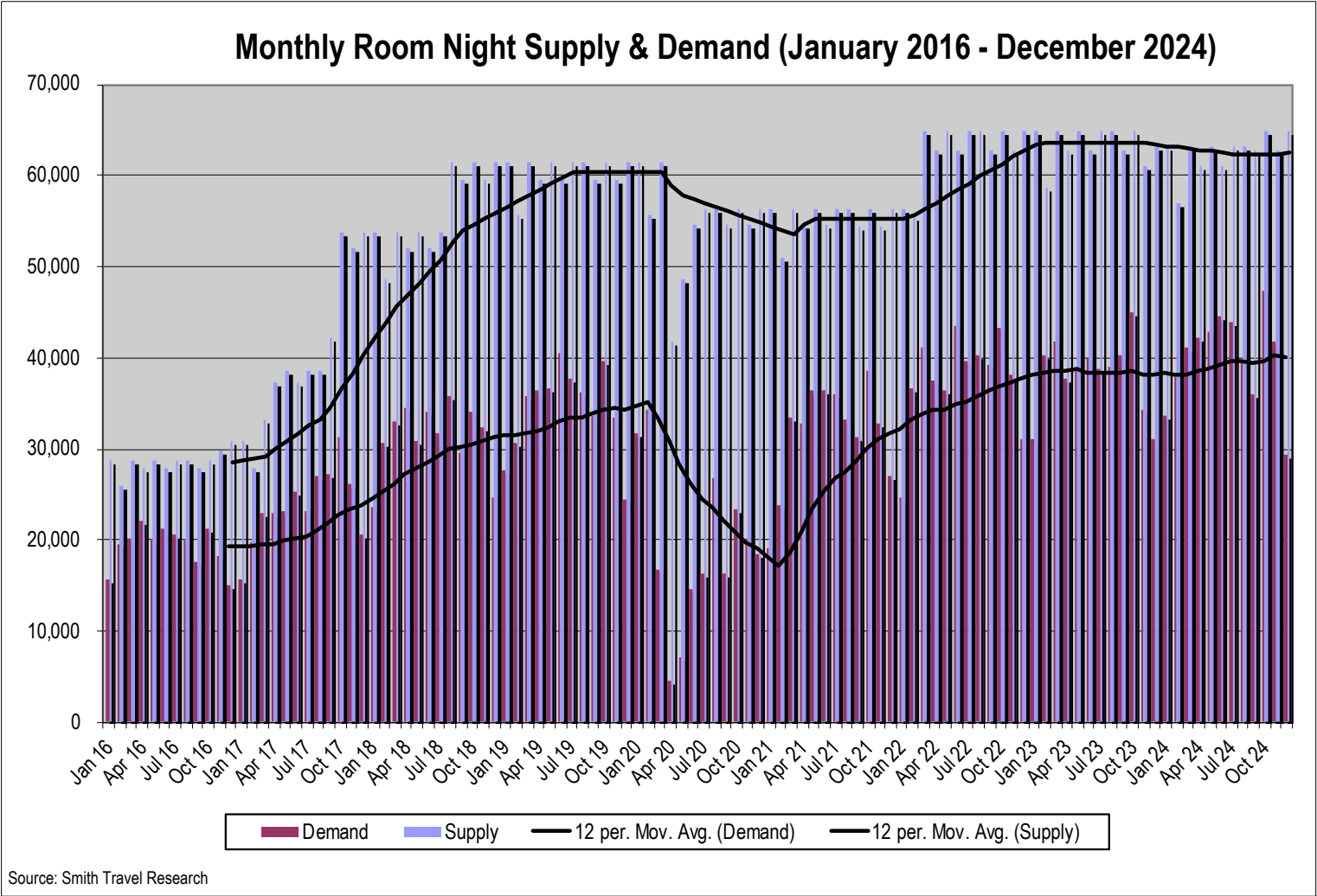
Historical Supply, Demand, Occupancy, ADR, and RevPar for Competitive Hotels											
College Station, TX Competitive Set											
Year	Annual Avg. Available Rooms	Available Room Nights	% Change	Room Nights Sold	% Change	% Occupancy	% Change	ADR	% Change	RevPar	% Change
2016	939	342,868	–	231,745	–	67.6	–	\$134.06	–	\$90.61	–
2017	1,327	484,218	41.2%	285,777	23.3%	59.0	-12.7%	\$131.64	-1.8%	\$77.69	-14.3%
2018	1,840	671,525	38.7%	375,102	31.3%	55.9	-5.4%	\$134.58	2.2%	\$75.17	-3.2%
2019	1,985	724,525	7.9%	412,924	10.1%	57.0	2.0%	\$130.24	-3.2%	\$74.23	-1.3%
2020	1,804	658,345	-9.1%	230,423	-44.2%	35.0	-38.6%	\$108.79	-16.5%	\$38.08	-48.7%
2021	1,818	663,476	0.8%	381,109	65.4%	57.4	64.1%	\$135.91	24.9%	\$78.07	105.0%
2022	2,062	752,556	13.4%	451,461	18.5%	60.0	4.4%	\$153.10	12.6%	\$91.84	17.6%
2023	2,084	760,742	1.1%	458,225	1.5%	60.2	0.4%	\$163.38	6.7%	\$98.41	7.2%
2024	2,055	750,215	-1.4%	480,768	4.9%	64.1	6.4%	\$177.95	8.9%	\$114.04	15.9%
CAGR (2016-2024)		14.9%		13.4%		-0.6%		4.1%		3.2%	
Source: Smith Travel Research, Hunden Partners											

Supply and Demand

The local competitive set experienced a sharp increase in room supply during 2017 and 2018, with the addition of 913 rooms across five new properties. However, the onset of the pandemic in March 2020 led to hotel closures, resulting in a decline in both available supply and demand.

Hotel room demand follows consistent seasonal trends, with significantly lower demand during winter months compared to spring and early fall.

While demand has steadily increased in recent years, it has not kept pace with the growth in hotel supply, leaving 2024 occupancy levels below those of 2016.



Heat Chart

The adjacent tables detail the performance of the local competitive set by month and day of week from January 2024 through December 2024, providing insight into seasonality and daily performance.

As shown, both occupancy and rates peak on weekends, particularly in late spring and fall. This trend is likely driven by Texas A&M University’s academic and athletic calendar, with graduations occurring in May and the NCAA football season taking place in the fall.

Conversely, Sundays through Tuesdays consistently recorded the lowest ADR and weakest occupancy levels, reflecting a market driven more by leisure than corporate business.

ADR by Day of Week by Month - January 2024 - December 2024								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jan - 24	\$124	\$128	\$134	\$132	\$132	\$147	\$147	\$136
Feb - 24	\$131	\$135	\$137	\$149	\$147	\$176	\$172	\$153
Mar - 24	\$135	\$141	\$141	\$140	\$145	\$165	\$157	\$148
Apr - 24	\$136	\$135	\$138	\$144	\$163	\$250	\$248	\$181
May - 24	\$135	\$135	\$143	\$161	\$203	\$220	\$198	\$179
Jun - 24	\$136	\$142	\$151	\$149	\$161	\$204	\$256	\$176
Jul - 24	\$143	\$147	\$161	\$164	\$168	\$174	\$169	\$162
Aug - 24	\$134	\$135	\$138	\$148	\$158	\$291	\$299	\$206
Sep - 24	\$133	\$134	\$141	\$149	\$149	\$229	\$242	\$169
Oct - 24	\$145	\$157	\$151	\$149	\$156	\$361	\$365	\$216
Nov - 24	\$132	\$134	\$138	\$141	\$151	\$343	\$360	\$236
Dec - 24	\$129	\$130	\$136	\$151	\$175	\$167	\$161	\$152
Average	\$134	\$138	\$143	\$148	\$159	\$227	\$231	

Sources: Smith Travel Research

Occupancy Percent by Day of Week by Month - January 2024 - December 2024								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Avg
Jan - 24	35.1%	40.2%	51.8%	56.5%	54.1%	67.8%	70.3%	53.3%
Feb - 24	41.5%	58.9%	65.8%	68.7%	63.4%	86.6%	82.4%	66.7%
Mar - 24	41.0%	65.8%	72.3%	69.9%	62.4%	74.4%	72.2%	65.1%
Apr - 24	48.3%	51.9%	66.5%	67.5%	71.0%	92.9%	90.2%	69.1%
May - 24	40.4%	48.8%	65.2%	73.7%	73.6%	81.5%	84.9%	67.8%
Jun - 24	46.0%	71.8%	75.3%	79.3%	84.8%	79.8%	79.2%	73.0%
Jul - 24	47.7%	64.8%	73.8%	77.0%	78.9%	74.0%	70.3%	69.7%
Aug - 24	40.3%	56.1%	57.1%	58.4%	60.3%	78.1%	80.8%	62.7%
Sep - 24	31.7%	48.1%	66.4%	76.2%	65.5%	61.2%	62.4%	57.5%
Oct - 24	53.3%	74.7%	72.5%	70.4%	71.5%	85.8%	84.7%	73.1%
Nov - 24	41.6%	50.6%	60.1%	62.6%	58.4%	87.6%	93.3%	66.6%
Dec - 24	27.4%	38.2%	41.3%	48.8%	53.7%	57.4%	58.1%	45.4%
Average	40.8%	55.1%	63.7%	67.6%	66.5%	77.4%	77.7%	

Sources: Smith Travel Research

Implications

Hotel & Walkable Package Analysis

Supply Growth & Demand Lag

The College Station competitive hotel market has expanded significantly over the past decade, with available supply doubling since 2016. As a result, the market has not yet fully absorbed the additional rooms, and occupancy levels remain below 2016 levels.

Seasonality Trends

As the home of one of the largest universities in the country, College Station's hospitality performance is heavily influenced by Texas A&M University's academic and athletic calendar. Both occupancy and rates peak on weekends during the NCAA football season and the university's graduation ceremonies.

Limited Group Business

College Station's hotel market offers limited meeting space to attract group business. As a result, occupancy and rates are weakest on weekdays, creating a missed opportunity for the city to capture additional overnight stays and event-driven spending.





04

Case Studies & Best Practices

Case Study Methodology

Hunden conducted an in-depth analysis of comparable hotel and convention centers across the U.S. with programming similar to the proposed Project and market similarities to College Station. These case studies highlight facility offerings, performance, and best practices from discussions with management. Additionally, Hunden identified entertainment venues that also serve as meeting and conference spaces, illustrating how a multipurpose facility in College Station could accommodate sports, entertainment, and traditional conventions and meetings.

In the case studies chapter, Hunden will identify:

- Relevant convention & hotel facilities in various markets across the United States,
- Funding mechanisms associated with development,
- Annual visitation and visitor trends, utilizing geofencing tracking analytics, and
- Best practices derived from private management related to facility operations.

Entertainment Venues

Flexible Music & Entertainment Venues for Inspiration



Mission Ballroom

Year Opened: 2019

Function Space: 60,000 SF (9,000 SF Ballroom)

Arena Capacity: 3,950

Cost: \$38 Million

Funding Tools: Private



Stride Bank Center

Year Opened: 2013

Function Space: 51,500 SF (20,000 SF Event Center)

Arena Capacity: 5,000

Cost: \$24 Million

Funding Tools: The project was funded through a one-percent sales tax increase approved by voters, with municipal bonds issued against the revenue. Later, Stride Bank's naming rights provided private funding for operations and improvements.

Mission Ballroom

The Mission Ballroom is one of the country's leading music and entertainment venues. The site provides an inspirational case study for a multipurpose concert and event space.

Location: Denver, CO

Operator: AEG

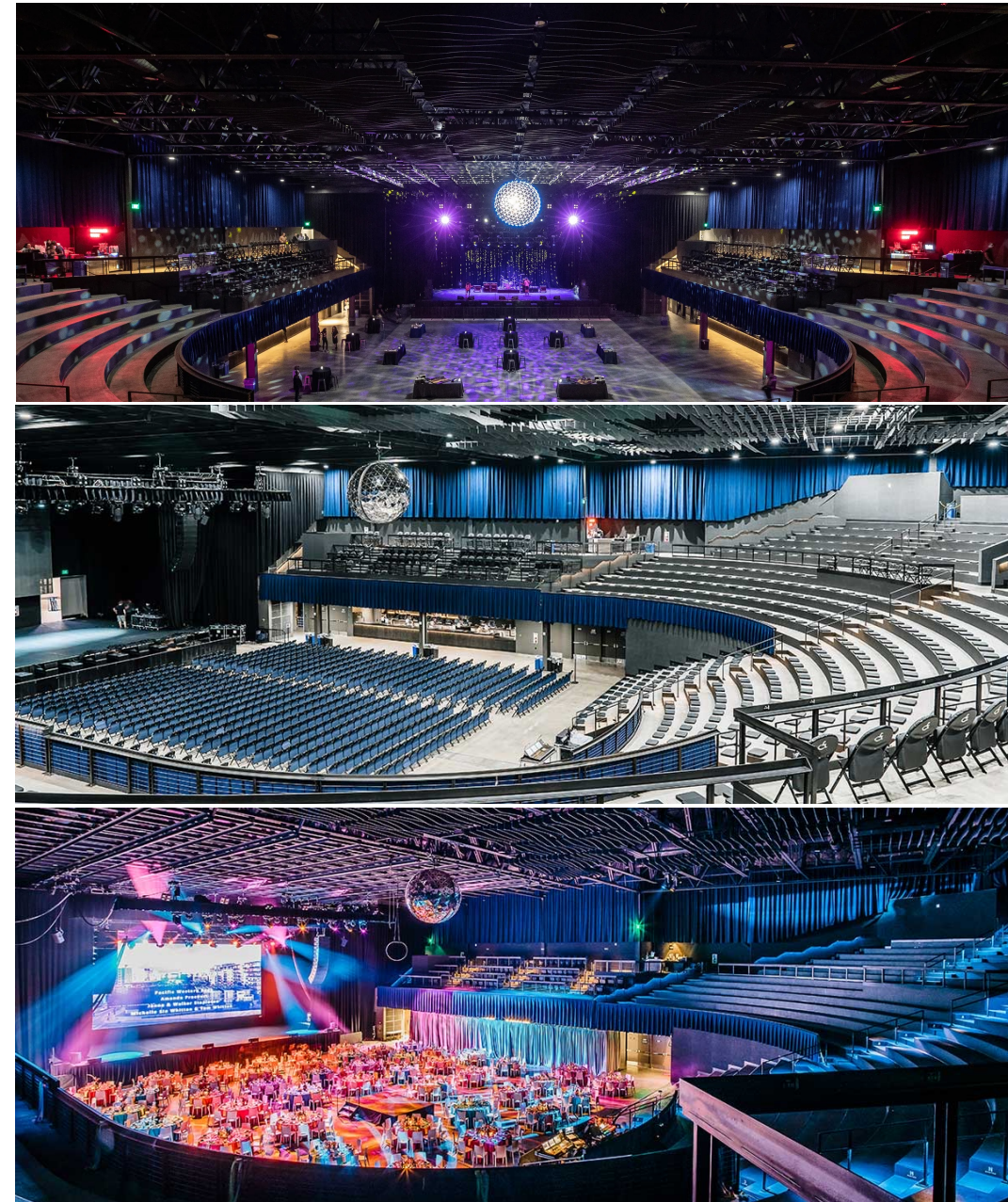
Year Open: 2019

Capacity: 3,950

Notes:

The Mission Ballroom, opened in August 2019 and operated by AEG, is a flexible 60,000-square-foot concert and event space featuring a 9,000-square-foot ballroom for corporate meetings, galas, weddings, and trade shows.

In 2023, the venue hosted 155 events and ranked 107th on Pollstar's list of top-grossing auditoriums and theaters.



Stride Bank Center

The Stride Bank Center serves as a relevant case study of a venue that has both an arena and adjacent conference facility.

Location: Enid, OK
Owner: City of Enid
Operator: OVG
Year Open: 2013
Capacity: 5,000
Notes:

The Stride Bank Center opened in 2013 and was known as the Enid Event Center and the Central National Bank Center before becoming the Stride Bank Center in 2018. Built at a cost of \$24 million, the complex features a 5,000-seat arena that converts into a 30,000-square-foot event space. An adjacent 20,000-square-foot facility includes a divisible ballroom for meetings, conferences, weddings, and banquets.



Stride Bank Center

- The Stride Bank Center is Enid's convention center and most popular event facility.
- The venue features an 11,000-square-foot Grand Ballroom, a 3,000-square-foot Benson Ballroom, and more than 5,500 square feet of meeting rooms.
- Connected to the Stride Bank Center (formerly the Enid Event Center), which opened in June 2013, the arena seats 3,200 for sports and 3,800 for concerts, with a 31,500-square-foot show floor for trade shows.
- Both buildings provide additional meeting space for events.
- The Best Western, opened in 2021, offers 96 rooms adjacent to the center.

Stride Bank Center - Enid, OK			
	Total (SF)	By Division (SF)	Divisions
Exhibit Space	31,500		–
Stride Bank Center Arena (5,000 capacity)		31,500	
Ballroom Space (Event Center)	14,500		–
Grand Ballroom		11,000	
Benson Ballroom		3,500	
Meeting Space (Event Center)	5,500		9
Total	51,500		9
Summary	SF	Rooms/1000 SF	Divisions
Exhibit	31,500	31.5	–
Ballroom	14,500	14.5	–
Meeting Rooms	5,500	5.5	9
Total	51,500	51.5	9
Walkable Hotels	Room Count	Distance (Miles)	Hotel Class
GLo Best Western Enid OK Downtown/Conven	96	0	Upper Midscale
Total	96		
Source: Stride Bank Center, STR			

Convention Center

Convention Center Case Studies Overview



Waco Convention Center

Year Opened: 1972

Function Space: 80,309 SF

Cost: \$17.5 Million (2012 Renovations)

Funding Tools: The City of Waco approved a bond package totaling \$63 million in 2007, with \$17.5 million allocated for the extensive renovations of the convention center.



Plano Event Center

Year Opened: 1990

Function Space: 32,903 SF

Cost: \$2.5 Million (2017 Renovation)

Funding Tools: The City of Plano financed the most recent facility renovation through municipal funding.



Overland Park Convention Center

Year Opened: 2002

Function Space: 98,530 SF

Cost: \$46 Million

Funding Tools: The City of Overland Park issued \$33 million in bonds to refinance debt tied to the construction of the Overland Park Convention Center.



St. Charles Convention Center

Year Opened: 2005

Function Space: 56,849 SF

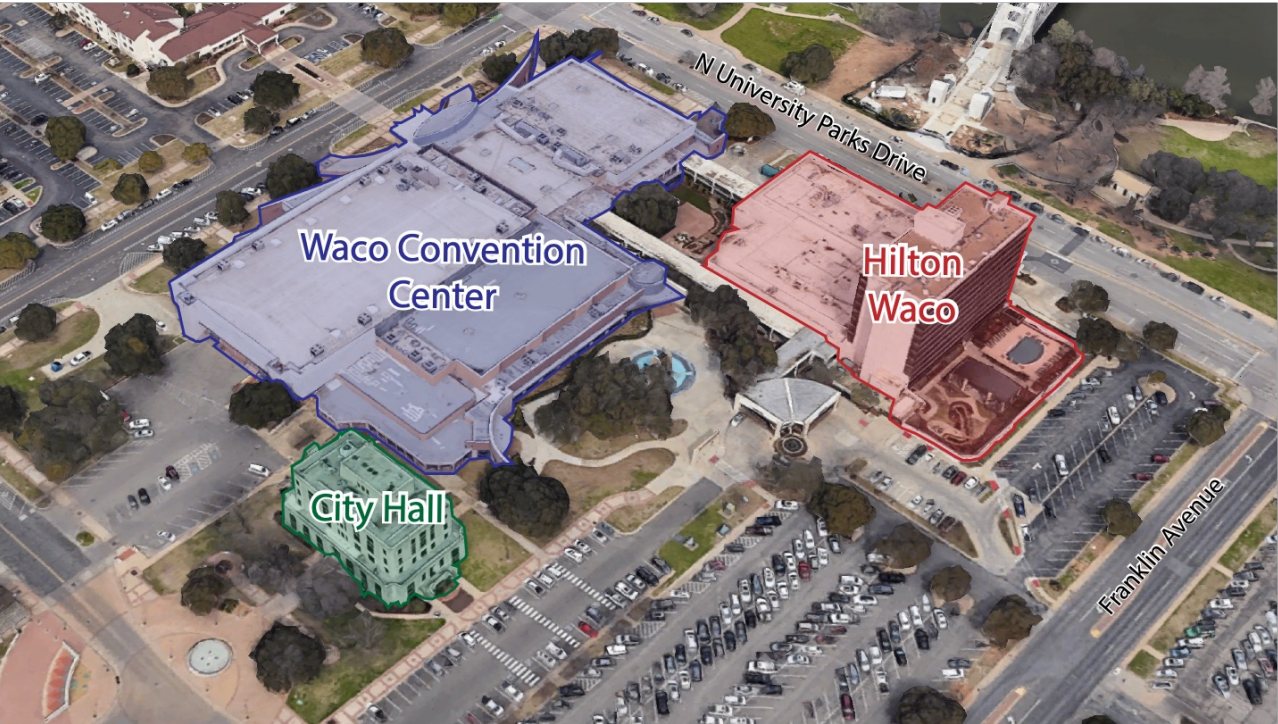
Cost: \$36 Million

Funding Tools: Funded through TIF and a five-percent county-wide hotel tax approved by St. Charles County Convention and Sports Facilities Authority.

Waco Convention Center Breakdown

The Waco Convention Center (WCC) opened in 1972 in downtown Waco along the Brazos River. The convention center is connected to the 195-key Hilton Waco.

The convention center features two exhibit halls (32,976-square-foot Chisholm Hall exhibit hall and 15,000-square-foot McLennan Hall), a 13,818-square-foot Brazos Ballroom (divisible by two) and a total of 18,515 square feet of meeting space across 13 rooms. The facility overlooks Indian Spring Park and the Brazos River and is located six blocks from Interstate 35.



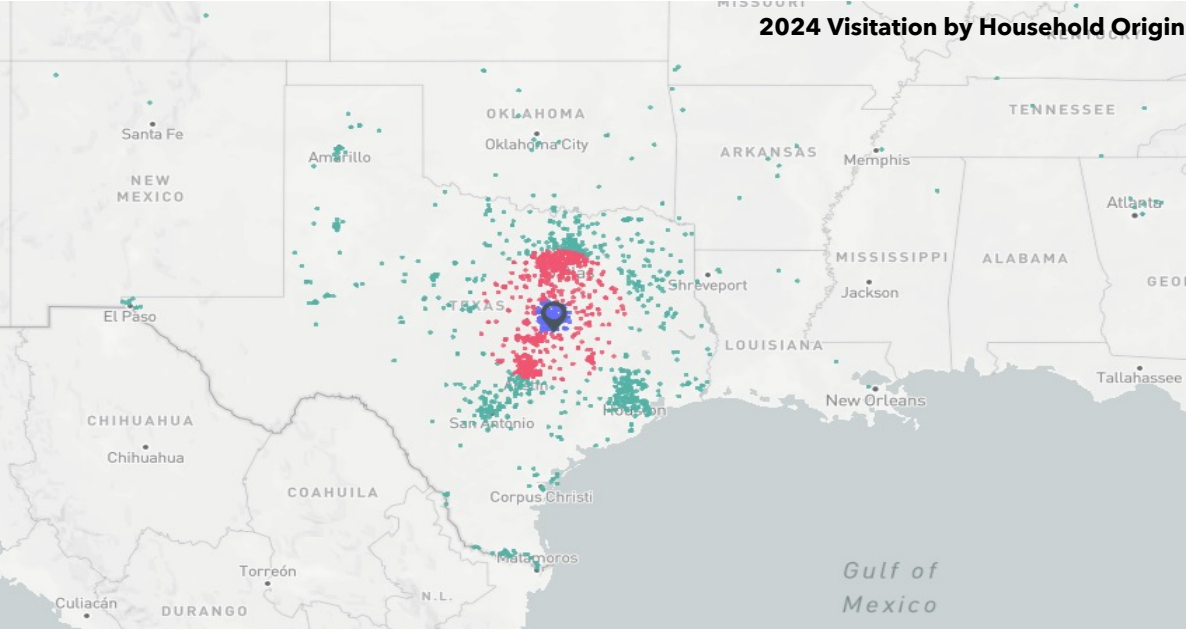
Waco Convention Center, Waco, TX			
	Total (SF)	By Division (SF)	Divisions
Exhibit Space	47,976		3
Chisholm Hall		32,976	
McLennan Hall		15,000	3
Ballroom Space	13,818		2
Brazos Ballroom North		7,252	
Brazos Ballroom South		6,566	
Meeting Space	18,515		13
DeCordova Room		3,332	
Event Office		1,632	
Waco Room		1,612	
Texas North 113		1,560	
Texas North 114		1,540	
Texas North 115		1,530	
Texas South 116		1,428	
Texas South 117		1,404	
Texas South 118		1,372	
Ranger Rooms		864	
Lone Star 103		780	
Lone Star 104		763	
Lone Star 105		698	
Total	80,309		21
Summary	SF	Rooms/1000 SF	Divisions
Exhibit	47,976	16.9	3
Ballroom	13,818	58.8	2
Meeting Rooms	18,515	43.9	13
Total	80,309	10.1	18
Walkable Hotels	Room Count	Distance	Hotel Class
Hilton Waco (connected)	195	0.1	Upper Upscale
Courtyard Waco	153	0.1	Upscale
EVEN Hotels Waco - University Area (U/C)	132	0.3	Upscale
Cambria Hotels Waco University	130	0.3	Upscale
Residence Inn Waco	78	0.3	Upscale
Hotel Herringbone (U/C)	21	0.3	Independent
Holiday Inn Express Waco Downtown (U/C)	104	0.3	Upper Midscale
Total	813		

Source: Waco Convention Center, Hunden Partners

Waco Convention Center - Visitation (2024)

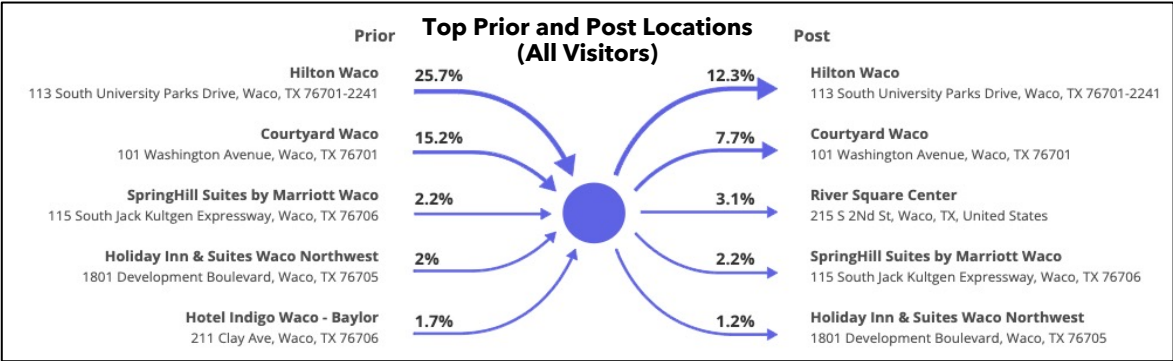
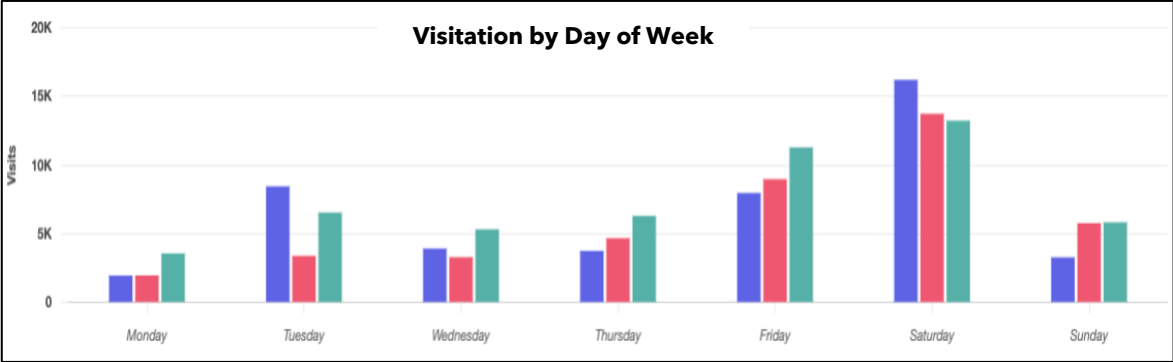
Key Takeaways

- In 2024, nearly 40 percent of all visitors traveled long distances, though most remained within the state. About 60 percent came from within 100 miles
- Visitation peaked on Fridays and Saturdays, while activity was more stagnant during weekdays
- The Hilton Waco was the most frequented pre- and post-event location for Waco Convention Center visitors, highlighting the impact of direct connectivity between the two properties



Waco Convention Center (Waco, TX) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	45,700	32.7%	29,100	35.7%	1.57
Regional Distance - Over 25 miles and Less Than 100 miles	42,000	30.0%	25,200	30.9%	1.67
Long Distance only - Over 100+ miles	52,200	37.3%	27,200	33.4%	1.92
Total Visits	139,900	100.0%	81,500	100.0%	1.72

Source: Placer.ai



Waco Convention Center – Lost Business Overview

The table to the right outlines the reasons that Waco Convention Center lost business from FY 2022 to FY 2026.

The majority of lost business simply indicated there was a vote to select another location for a group’s event. Lack of date availability was noted as the second most common reason for lost business.

The estimated lost revenue during this period exceeds \$1 million across 95 events.

Waco is currently losing business to other secondary and tertiary markets that cater toward groups looking for mid-sized venues due to the quality of the facility, size constraints, and lack of date availability.

Lost Business Summary (2022-2026)		
Reason	Event Count	Event Ordered Revenue
Board/Committee/Member Vote	48	\$589,362
Desired Dates Not Available / Insufficient Space	22	\$238,014
Customer Preference/Politics	7	\$55,752
Postponed	5	\$27,960
Safety Concerns	5	\$67,879
Can't Meet Client Specs/Special Accommodations	4	\$7,759
Hotel Rates Too High	2	\$17,937
Transportation Needs Not Met	2	\$22,167
Total	95	\$1,065,759
Source: Visit Waco		

The Future of Waco as a Convention Destination

- The major markets within Texas (Dallas, Fort Worth, San Antonio, Austin, and Houston) are all simultaneously making major investments in their convention center and/or headquarters hotel packages. Through meeting planner interviews, Hunden concluded there are a high volume of groups rotating business through Texas that prefer secondary markets for their events. As the major metros continue to grow, they will continue to pursue larger city-wide events, leaving opportunity for smaller, yet impactful regional/national events for a mid-sized center within the state.
- With a larger convention center, Waco is likely to compete with a new set of cities for business such as Arlington and Irvine. These cities have completed their facilities, preventing them from pursuing incentives that could be leveraged by Waco.
- Waco has emerged as a prominent leisure destination that meeting planners view as an attractive location for events with a growing hotel supply and unique entertainment assets.



Plano Event Center Breakdown

Opened in 1990, the Plano Event Center (PEC) lacks a connected hotel, a key barrier to attracting more business. Plans for adjacent mixed-use and hotel development are under discussion.

The facility offers approximately 32,903 square feet of designated indoor function space. This includes 21,600 square feet of divisible exhibit space, 3,556 square feet of ballroom space, and 7,747 square feet of meeting space spread across 12 breakout rooms. The exhibit hall also frequently serves as flexible ballroom space. The City of Plano owns and manages the facility. The PEC’s catering department serves as the exclusive caterer.

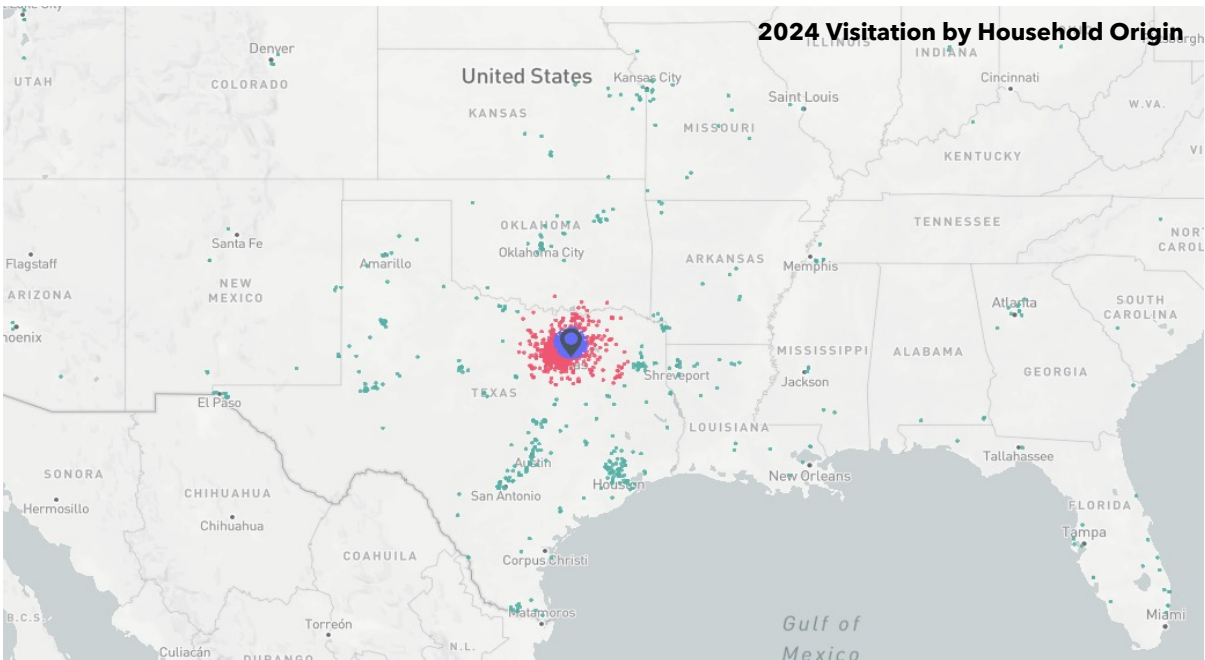


Plano Event Center			
	Total (SF)	By Division (SF)	Divisions
Exhibit Space	21,600		3
Collinwood Hall	21,600		3
Collinwood 1		14,400	
Collinwood 2		3,600	
Collinwood 3		3,600	
Ballroom Space	3,556		1
Windhaven	3,556		1
Meeting Space	7,747		12
Northbrook	2,778		3
Northbrook 1		926	
Northbrook 2		926	
Northbrook 3		926	
Spring Glade	1,099		2
Spring Glade 1		556	
Spring Glade 2		543	
Sunny Slope	1,087		2
Sunny Slope 1		544	
Sunny Slope 2		543	
Fairview	1,087		2
Fairview 1		544	
Fairview 2		543	
Lavon	587	587	1
Hillhaven	574	574	1
Shady Grove	535	535	1
Summary	Total SF		Divisions
Exhibit	21,600	-	3
Ballroom	3,556		1
Meeting Rooms	7,747		12
Total	32,903	-	16
Source: Plano Event Center			

Plano Convention Center - Visitation (2024)

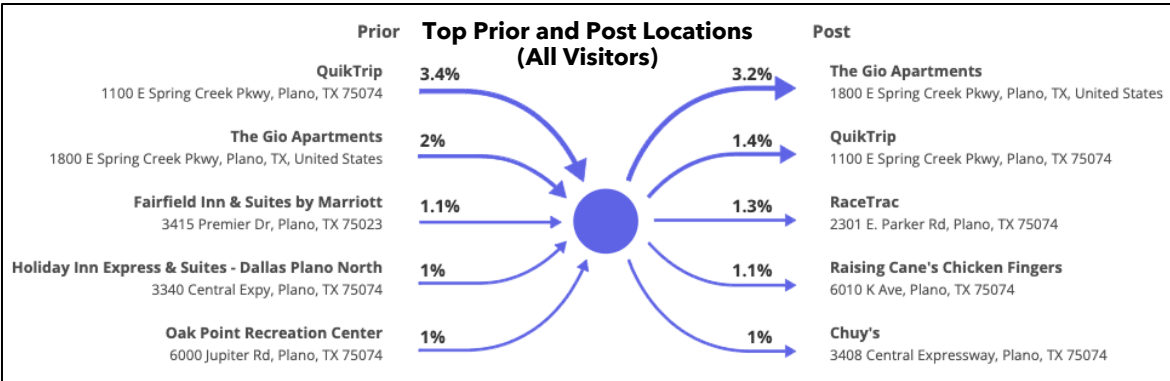
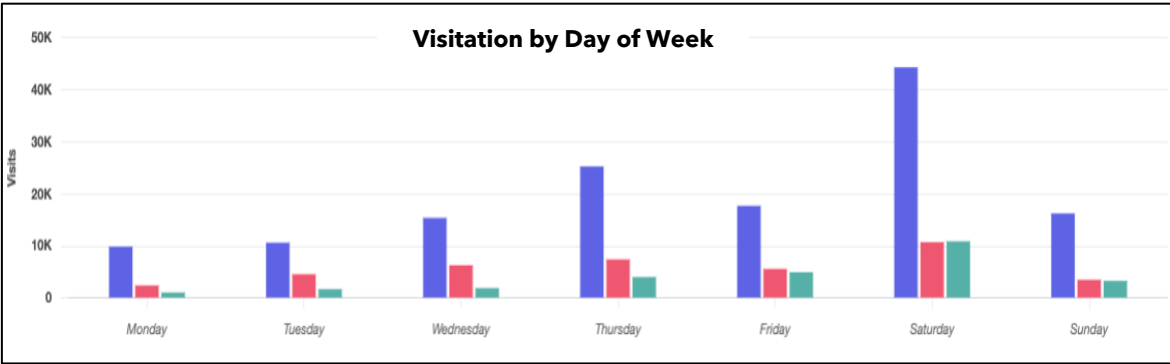
Key Takeaways

- The majority of visitors came from within 25 miles, highlighting the facility's primarily local business segment. Only 13.5 percent traveled from more than 100 miles away
- Visitation peaked on Saturday, while other days remained relatively stagnant
- The absence of a connected hotel is reflected in pre- and post-visitation trends. Limited interaction with hotel properties suggests minimal hotel room night generation and a focus on localized events



Plano Event Center (Plano, TX) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	139,500	66.9%	106,400	68.9%	1.31
Regional & Long Distance - Over 25 miles and Less Than 100 miles	40,800	19.6%	30,400	19.7%	1.34
Long Distance only - Over 100 miles	28,100	13.5%	17,700	11.5%	1.59
Total Visits	208,400	100.0%	154,500	100.0%	1.35

Source: Placer.ai



Overland Park Convention Center Breakdown

The Overland Park Convention Center (OPCC) opened in 2002 and cost \$46 million to build. The convention center is connected to the 412-key Sheraton Overland Park Hotel.

The facility boasts 98,530 square feet of total function space, which includes a 58,494-square-foot exhibit hall, a 24,991-square-foot ballroom, and additional meeting rooms. On-site amenities include restaurant, catering, private outdoor space, and meeting rooms. The facility can accommodate meetings and conferences, consumer trade shows, banquets and galas, and weddings. This facility is one of the most utilized event spaces in the local market.

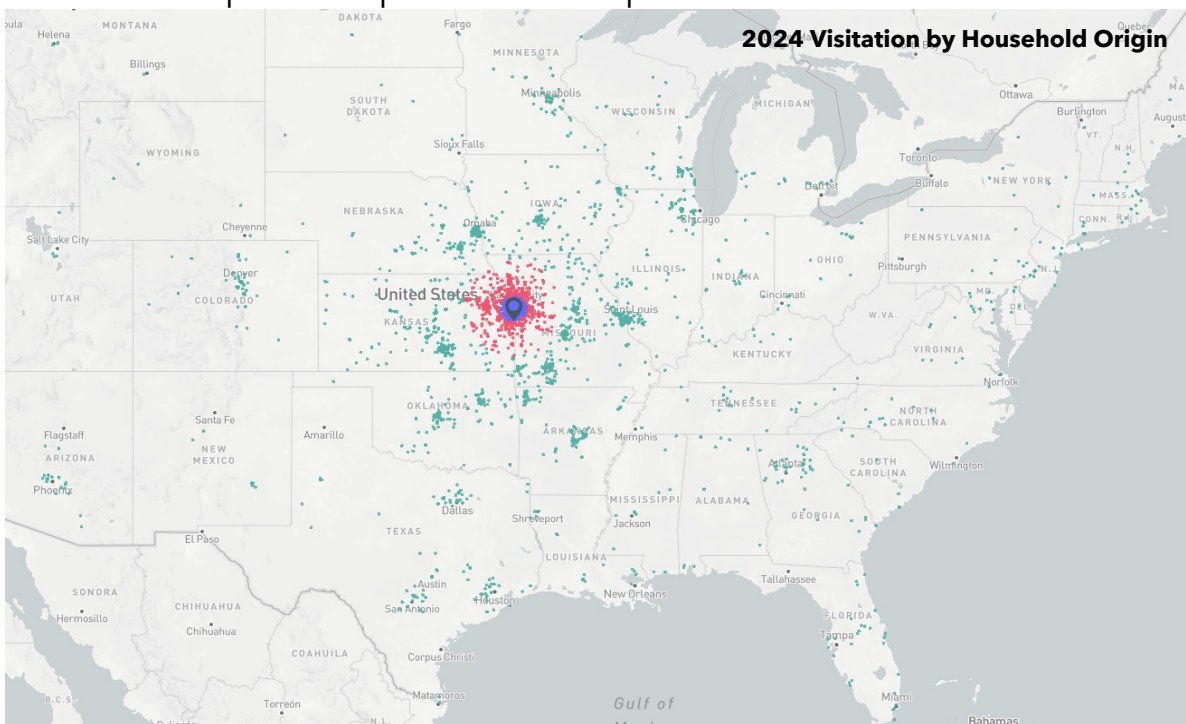


Overland Park Convention Center, Overland Park, KS			
	Total (SF)	By Division (SF)	Divisions
Exhibit Space	58,494		2
Hall A		29,030	
Hall B		29,464	
Ballroom Space	24,991		4
Ballroom A1		4,232	
Ballroom A2		4,250	
Ballroom B		7,830	
Ballroom C		8,679	
Meeting Space	15,045		8
Courtyard Room 1		3,093	
Courtyard Room 2		1,858	
Courtyard Room 3		1,810	
Courtyard Room 4		1,810	
Courtyard Room 5		1,858	
Courtyard Room 6		1,858	
Courtyard Room 7		1,858	
Executive Conference Room		900	
	98,530		14
Summary	SF	Rooms/1000 SF	Divisions
Exhibit	58,494	14.1	2
Ballroom	24,991	33.0	4
Meeting Rooms	15,045	54.8	8
Total	98,530	8.4	14
Walkable Hotels	Room Count	Distance	
Sheraton Hotel	412	0	
Hilton Garden Inn	125	0.1	
Courtyard Kansas City	168	0.1	
Holiday Inn & Suites	119	0.3	
Total	824		
Source: Cvent			

Overland Park Convention Center - Visitation (2024)

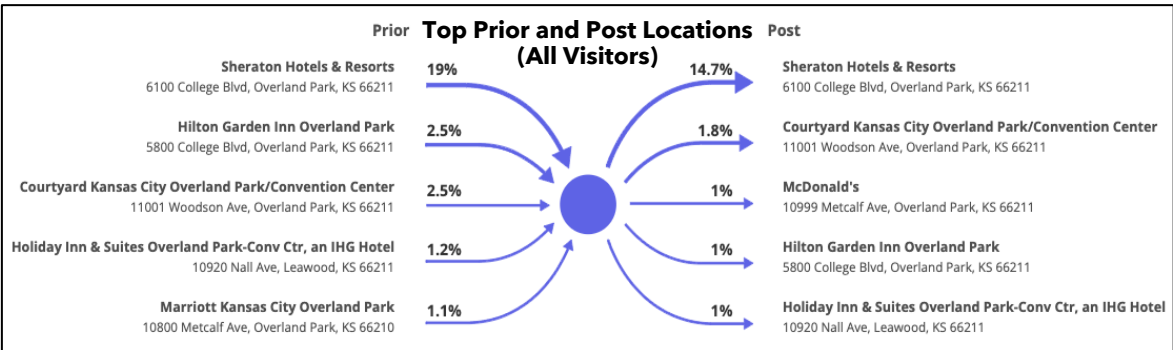
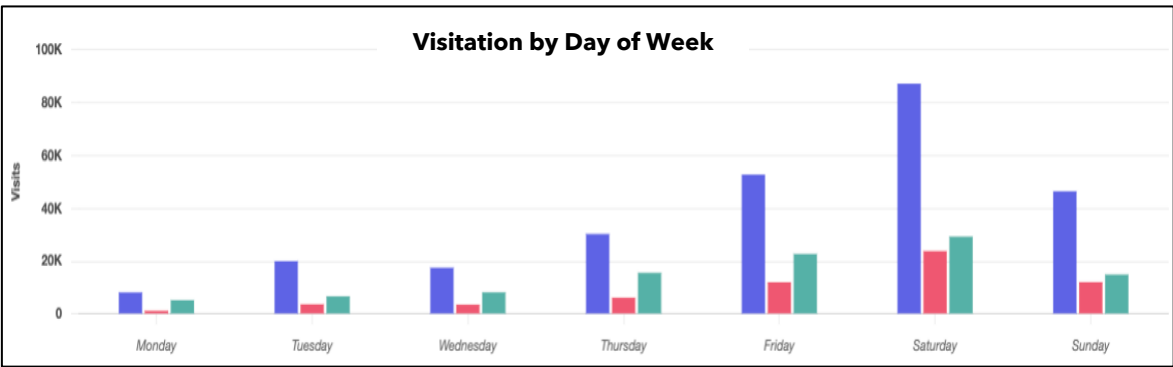
Key Takeaways

- More than 60 percent of 2024 visitors came from within 25 miles, but out-of-state travelers from multiple markets highlight broader appeal
- Saturdays saw the highest visitor traffic
- The OPCC's connected, walkable hotels drive visitor activity, as reflected in pre- and post-visitation patterns



Overland Park Convention Center (Overland Park, KS) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	262,300	61.3%	161,100	63.3%	1.63
Regional Distance - Over 25 miles and Less Than 100 miles	62,700	14.7%	42,400	16.6%	1.48
Long Distance only - Over 100+ miles	102,900	24.0%	51,200	20.1%	2.01
Total Visits	427,900	100.0%	254,700	100.0%	1.68

Source: Placer.ai



St. Charles Convention Center Breakdown

The St. Charles Convention Center (SCCC) opened in 2005 and cost \$36 million to build. The convention center is connected to the 296-key Embassy Suites Hotel.

The facility boasts 56,849 square feet of total function space, which includes a 27,600-square-foot exhibit hall, a 22,225-square-foot ballroom, and additional meeting rooms. Most events hosted at the property are corporate events or banquets. Three walkable hotels are within 0.3 miles from the event center, totaling 405 rooms. On-site amenities include restaurant, catering, and a gift shop.

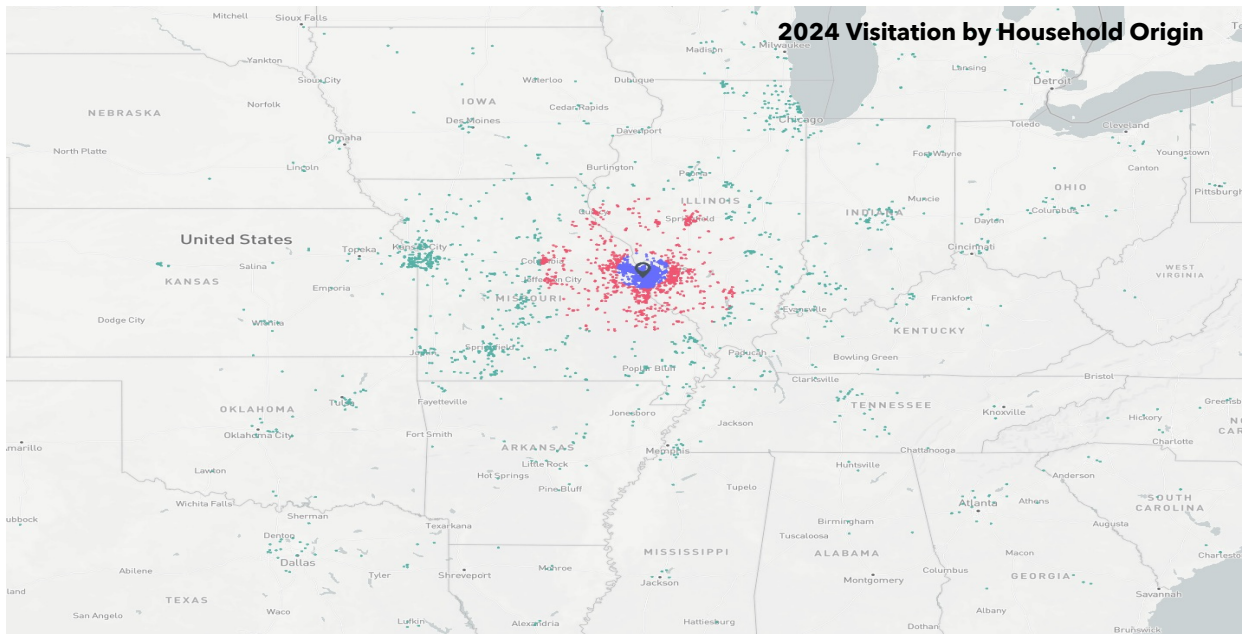


St. Charles Convention Center, St. Charles, MO			
	Total (SF)	By Division (SF)	Divisions
Exhibit Space	27,600		2
North Hall		14,500	
South Hall		13,100	
Ballroom Space	22,225		10
Ballroom A		4,010	
Ballroom B		4,010	
Ballroom C		4,010	
Ballroom D1		1,390	
Ballroom D2		1,410	
Ballroom D3		1,370	
Jr. Ballroom A		1,450	
Jr. Ballroom B		1,530	
Jr. Ballroom C		1,530	
Jr. Ballroom D		1,515	
Meeting Space	7,024		7
Meeting Room 101		1,100	
Meeting Room 102		1,000	
Meeting Room 103		1,000	
Meeting Room 104		840	
Meeting Room 105		1,310	
Executive Board Room		1,270	
Conference Room		504	
	56,849		19
Summary	SF	Rooms/1000 SF	Divisions
Exhibit	27,600	14.7	2
Ballroom	22,225	18.2	10
Meeting Rooms	7,024	57.7	7
Total	56,849	7.1	19
Walkable Hotels	Room Count	Distance	
Embassy Suites	296	0	
Baymont	45	0.1	
Americas Best Value Inn	64	0.3	
Total	405		
Source: St Charles Convention Center			

St. Charles Convention Center - Visitation (2024)

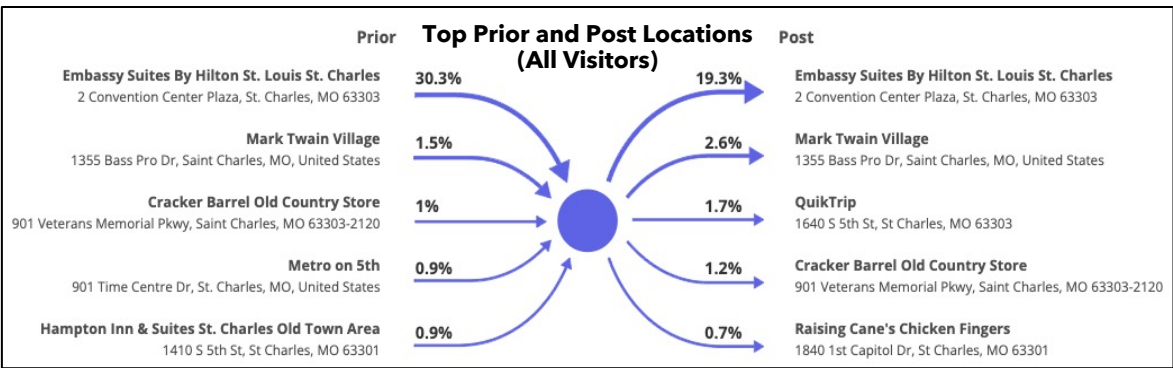
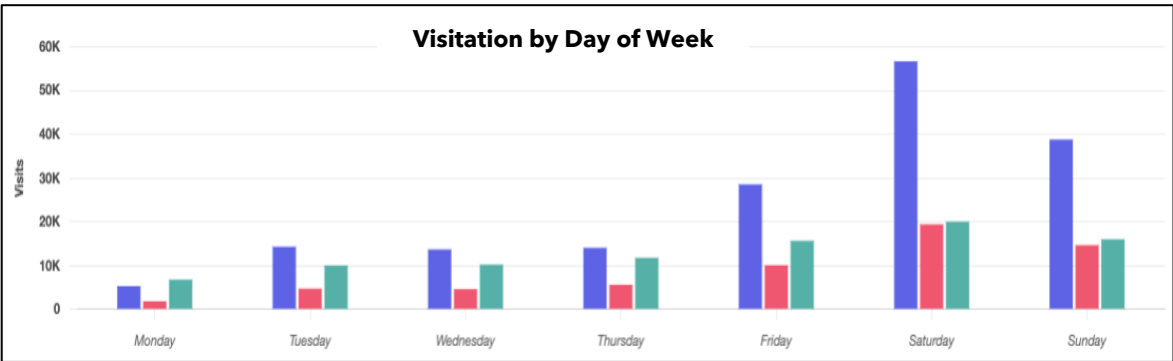
Key Takeaways

- More than half of visitors traveled from within 25 miles, while long-distance travelers came mainly from neighboring states and major metros like Chicago and Dallas
- Visitation remained steady on weekdays, with peak traffic on Saturdays and Sundays
- Embassy Suites (connected to SCCC) was the top pre- and post-visit destination, followed by Mark Twain Village, highlighting the strong synergy between nearby hotels, retail, and dining



St. Charles Convention Center (St. Charles, MO) - Total Visitation January 1, 2024 - December 31, 2024					
Visitor Origins by Distance from Site (Colors correspond to charts & maps)	Total Visits		Total Unique Customers		Avg. Visits per Customer
	Est. Number of Visits	Percent of Total Visits	Est. Number of Customers	Percent of Total Customers	
Locals - Within 25 miles	171,600	53.0%	98,800	56.5%	1.74
Regional & Long Distance - Over 25 miles and Less Than 100 miles	61,300	18.9%	35,600	20.4%	1.72
Long Distance only - Over 100 miles	90,700	28.0%	40,400	23.1%	2.25
Total Visits	323,600	100.0%	174,800	100.0%	1.85

Source: Placer.ai



Case Study & Private Management Feedback Themes

The following themes capture the key focus areas from stakeholder discussions with case study facilities and private management representatives.

During the planning stages, it is critical to align on the true purpose of the event facility and the primary group types it will serve (e.g., local organizations vs. regional and statewide groups).

A connected or adjacent full-service hotel and walkable mixed-use district is crucial for attracting high-value groups and association events.

Consider private management for operation efficiency and a dedicated maintenance reserve fund for long-term sustainability.

Build a flexible, tech-ready venue with ample networking spaces (indoor and outdoor) to cater to evolving event needs.

New build design should include adequate pre-function areas, flexible exhibit/ballroom space, high ceilings, and modern tech infrastructure for multipurpose use.

Target corporate and association business by ensuring a flexible facility. A connected hotel will be essential for attracting conventions.

Benefits of Private Management

1

Municipal Partners Maintain Control

Municipalities maintain approval of operating and capital budgets, direction, and supervision of policy, and regular financial and management reports. Municipal partners benefit from the implementation of best practices accumulated by the large portfolios of private firms.

2

Financial Operations

Municipalities benefit from standardized reporting, benchmarking, lead generation, and national ticketing deals, internal controls and audits, and transparency. Private firms leverage expertise, experience, and resources to serve municipalities and boost impact.

3

Human Resources & Professional Development

Municipalities benefit from professionally trained and experienced managers, freedom from municipal hiring restrictions and bargaining units, training programs and conferences, and organized labor negotiations and relationships. ASM Global has historically transitioned more than 90 percent of municipal employees at the venues they manage.

4

Risk Management

Municipalities benefit from contracts and license agreement support, standardized agreements, and insurance procurement and leverage. Private firms provide programs that create safe environments and promote high levels of guest service.

5

Operations

Municipalities benefit from best practices programs, proprietary software, master service agreements, preferred vendor relationships and pricing, and venue assessments. Private firms' teams provide excellence and fiduciary care for their venues.

Implications

Case Studies & Best Practices Analysis

HQ Hotels Boost Competitiveness

Developing an HQ hotel has significantly improved convention centers' ability to attract regional and national events, expanding their market reach beyond local business.

Walkability & Activation Drives Success

A lack of walkable hotels is a key competitive disadvantage. Adjacent retail, dining, and entertainment enhance destination appeal for meetings and events.

Private Management Ensures Smooth Operations

While not all successful convention centers are privately operated, leading private firms drive revenue, align with municipal goals, and maximize economic impact.





05

Recommendations & Next Steps

Preliminary Conclusions

Flexibility: College Station lacks high-quality, flexible space to accommodate a variety of events. A versatile venue would ensure steady activity year-round, capturing not only conventions and conferences but also sporting and entertainment events, which are currently underserved and in demand.

Need for Lodging: A successful convention facility requires a connected hotel. A walkable hotel package – including full-service, select-service, and limited-service properties – is essential to attract overnight events.

Affordability & Size: A suburban facility offers meeting planners a more affordable option than large, full-service hotels. It also provides an appropriately sized space for small to mid-sized functions, as compared to large downtown convention centers or major suburban expo facilities.

Competitive Supply: The proposed Project will have to differentiate itself from the already established destinations in downtown Houston and in the suburbs that have been able to capture corporate and convention demand through the attractiveness of walkability and support amenities (shopping, dining, hotels). Complimentary nearby assets, such as restaurants and entertainment, are recommended to ensure the development has a destination appeal outside of the venue itself.

Market Contingencies: Better integration with Texas A&M's event facilities could help College Station capture more association, group business, and entertainment acts, potentially reducing the need for a fully dedicated convention center.

Recommendation - Scenario One

Convention Center Program

	Feature	Capacity	Estimated Maximum Capacity
	Exhibit Hall/ Flexible Event Floor	45,000 SF 3 divisible spaces	3,000
	Ballroom Junior Ballroom	20,000 SF (8 divisible spaces, incl. in Exhibit Hall) 10,000 SF (4 divisible spaces)	1,333 667
	Meeting Rooms	15,000 SF 15 divisible spaces	Variable
	Back of House, Front of House, Circulation	77,500	
	Parking	~1,000 Spaces	
			70,000 SF Total (Sellable)
			147,000 SF Total (Full CC)
			Minimum Land w/ Structured Parking: 7 Acres*
			Minimum Land w/ Surface Parking: 15 Acres*
			*acreage includes hotel

Hotel Program

	Hotel	275 keys	--
	Ballroom Junior Ballroom	12,000 SF (3 divisible spaces) 5,000 SF (3 divisible spaces)	800 333
	Meeting Rooms	4,000 SF 4 divisible spaces	Variable
			24,000 SF Total

Recommendation - Scenario Two

Convention Center Program

	Feature	Capacity	Estimated Maximum Capacity
	Exhibit Hall/ Flexible Event Floor	65,000 SF 3 divisible spaces	4,667
	Ballroom Junior Ballroom	30,000 SF (12 divisible spaces, incl. in Exhibit Hall) 12,000 SF (6 divisible spaces)	2,000 1,333
	Meeting Rooms	24,000 SF 15 divisible spaces	Variable
	Back of House, Front of House, Circulation	111,100	
	Parking	~1,000 Spaces	
			101,000 SF Total (Sellable)
			212,100 SF Total (Full CC)
			Minimum Land w/ Structured Parking: 9.5 Acres*
			Minimum Land w/ Surface Parking: 20 Acres*
			*acreage includes hotel

Hotel Program

	Hotel	400 keys	--
	Ballroom Junior Ballroom	15,000 SF (3 divisible spaces) 8,000 SF (3 divisible spaces)	1,000 533
	Meeting Rooms	7,000 SF 4 divisible spaces	Variable
			30,000 SF Total

Next Steps

February 27 - In-Person City Council Meeting

Determination to Proceed with Phase II

TVS site assessment, layouts, and cost estimates

Demand & Financial Projections/Economic & Fiscal Impacts



213 W. INSTITUTE PLACE
SUITE 707
CHICAGO, IL 60610



312.643.2500



WWW.HUNDEN.COM

Hunden Partners is a full-service real estate development advisory practice specializing in destination assets.

With professionals in Chicago, New York, Dallas, Washington, and Minneapolis, Hunden provides a variety of services for all stages of destination development in:

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

The firm and its principal have performed more than 1,000 studies over the past 29 years, with more than \$20 billion in built, successful projects.

April 30, 2025

Item No. 3.5.

Presentation, discussion, and possible action on the FY25 use of the HOT Fund and FY26 Budget Requests.

Sponsor: Jeremiah Cook, Assistant Director - Tourism

Reviewed By CBC: N/A

Agenda Caption: Presentation, discussion, and possible action on the FY25 use of the HOT Fund and FY26 Budget Requests.

Relationship to Strategic Goals:

Diverse & Growing Economy

Recommendation(s): Staff recommends the Committee receive the presentation and provide direction.

Summary: See attached memo

Budget & Financial Summary: N/A

Attachments:

1. Budget Memo
2. FY25 Budget

Memorandum

To: Tourism Committee Members

From: Jeremiah Cook, Assistant Director- Tourism, City of College Station

Subject: FY26 Budget Discussion

Current Year Staffing Status

Current Vacant Positions within the Department include:

1. District Manager
2. Marketing Coordinator
3. Servicing Coordinator - Sports
4. Visitor Engagement Assistant Part Time (qty. 2)
5. Visitor Engagement Manager

FY25 Budget Breakdown

Overall	
Salary & Benefits	\$ 1,668,562
Marketing	\$ 766,853
Total Grants & Sponsorships	\$ 870,510
<i>HOT Grants</i>	<i>\$ 754,010</i>
<i>Sponsorships</i>	<i>\$ 116,500</i>
Christmas (earmarked)	\$ 200,000
Servicing	\$ 172,487
Sales	\$ 486,086
Administrative (office supplies, research, etc...)	\$ 375,918
Total Budget	\$ 4,540,416

	Conventions	Sports
Salary & Benefits	\$ 285,324	\$ 299,506
Marketing	\$ 21,797	\$ 23,312
Total Grants & Sponsorships	\$ 376,650	\$ 481,360
<i>HOT Grants</i>	<i>\$ 296,800</i>	<i>\$ 457,210</i>
<i>Sponsorships</i>	<i>\$ 79,850</i>	<i>\$ 24,150</i>
Servicing	\$ 20,930	\$ 88,890
Sales	\$ 131,260	\$ 224,915
Total Budget	\$ 835,961	\$ 1,117,983

FY25 SLA Status

1. **Events & Servicing Coordinator:** This position was hired in October and has been working to ensure that our conventions clients receive College Station hospitality during their conferences.
2. **HOT Grants:** Events such as the American Public Works Association and the Rotary District 5890 Conference have occurred in College Station. This SLA is still ongoing as some events have not yet occurred.
3. **Tourism Marketing & Advertising:** The additional funding provided through this recurring SLA was built into the marketing contract with The Zimmerman Agency, Visit College Station's agency of record. These funds are being utilized toward paid media to enhance the College Station brand, broadening our reach through the partnership with Zimmerman.
4. **Visitor Guides and Digital Marketing Content:** Contract was executed and remains in effect with Crowdriff to support VCS' inclusion of user generated content in social media. Additionally, this SLA provided funding for the printing costs associated with our "College Station Insider's Guide." Funds will be expended for additional visitor guides as needed through the remainder of the fiscal year.
5. **Games of Texas:** The Games of Texas event will be in College Station July 31st through August 3rd, 2025. The event is expected to bring in over 8,000 attendees and provide a direct economic impact of over \$12 million.

Proposed FY26 SLA's

SLA Description	One Time Cost	Recurring Cost	Total Cost
HOT Grants	\$ 75,000		\$ 75,000
Signature Leisure Event Attraction	\$ 225,000		\$ 225,000
Sales Event Attraction		\$ 100,000	\$ 100,000
Marketing & Information Resources		\$ 70,000	\$ 70,000
PR & Influencer Marketing		\$ 55,000	\$ 55,000
New Business Development – TAMU		\$ 25,000	\$ 25,000
Experiential Marketing	\$ 25,000		\$ 25,000
Holiday Kickoff	\$ 50,000		\$ 50,000
Music Sponsorship	\$ 100,000		\$ 100,000
Games of Texas	\$ 750,000		\$ 750,000
Total	\$ 1,225,000	\$ 250,000	\$ 1,475,000

1. HOT Grants:

Ensuring that College Station is able to attract new business and fulfill prior obligations is critical to the continuation of Meeting/Conventions attraction. As a result, and in order to remain competitive and nimble for FY26, additional funding in the form of HOT grants can be utilized to incent additional business, especially those with a significant return on investment. Some of the groups funded could include the American Planning Association Texas chapter and the International Town and Gown Association.

2. Signature Leisure Event Attraction:

As part of our goal to attract and develop new signature events that drive tourism while also enriching the local community, a food festival presents a unique opportunity to position College Station as a premier destination for culinary experiences. We are proposing to partner with the Chefs For Farmers Food & Wine Festival (CFF), a premier culinary event that originated in 2010 as an intimate farm-to-table dinner in Dallas, TX. Over the years, it has grown into multi-day festivals in Dallas and Houston that attracts over 7,500 affluent food and wine enthusiasts annually, solidifying its reputation as must-attend events on the culinary calendar. By highlighting the vibrant food culture of each host city and/or region, the festival not only delivers world-class culinary experiences but also fosters a deep connection between the community and its local food producers. With a strong emphasis on sustainability, eco-conscious practices, and philanthropy, CFF strives to set the standard for best-in-class food festivals across Texas.

3. Sales Event Attraction:

Requested funds would support a targeted initiative aimed at attracting high-impact event, such as trade shows, conferences, and conventions, that bring together meeting planners and suppliers. These events provide a unique opportunity to increase tourism, generate significant revenue for local businesses, and position our city as a prime destination for future business events. It is essential that we secure the necessary funding before bidding on events, as we cannot confidently proceed with a bid without necessary resources. The proposed budget will fund marketing, outreach, and event coordination efforts to secure and host these high-profile gatherings, ultimately enhancing the city's reputation as a leading destination for business tourism. Measurable returns that will continue to benefit our community for years to come are anticipated.

4. Marketing & Information Resources

Visit College Station provides a suite of essential marketing and informational resources, both digital and printed, designed to enhance the visitor experience, support business development and drive tourism. These resources include visitor guides, maps, sales and business collateral and environmental graphics—all of which play a critical role in promoting the city to potential travelers, assisting them with planning their trip and connecting them to additional resources for what to do and where to go while visiting. Staff currently maintains an inventory of approximately 14,000 visitor guides which continue to be disseminated to the local hospitality industry, regional centers of tourism, and prospective visitors.

Investing in these materials ensures that College Station is positioned as a premier destination, offering clear, compelling and visually engaging information that inspires visitors to explore, stay longer and return. Visitor guides and maps serve as navigational tools that highlight attractions, dining and accommodations, making it easier for guests to experience all the city has to offer. Sales and business collateral provide essential support for meeting planners, sports organizers and industry partners, reinforcing College Station's appeal as a top-tier event destination. Additionally, we'd like to deploy environmental graphics—signage and super graphics-- in high traffic public spaces to engage with visitors and residents.

5. PR & Influencer Marketing

To generate impactful buzz and position College Station as a premier destination for visitors, meeting planners and sports organizers, we must implement a robust storytelling strategy targeting regional, national and trade media. This approach will spotlight College Station's unique offerings while reinforcing its identity as a dynamic and versatile destination. The chosen PR firm will have a robust media network and experience with tourism, hospitality, events and economic development. Their scope of work will include crafting story ideas and case studies, pitching and securing media coverage, coordinating interviews and FAM trips, tracking and reporting coverage and providing insights and recommendations for future strategy.

As part of this effort, the PR agency's scope of work will also include an Influencer Marketing component, which aligns with the core principles of public relations. With traditional media declining and social media's influence rising, influencers now serve as modern-day media outlets, shaping public perception much like journalists. PR professionals are best suited to manage these partnerships, ensuring authentic messaging, mitigating risks and integrating influencer content into broader earned and shared media strategies.

6. New Business Development (Texas A&M)

The Texas A&M Sales Coordinator role is charged with creating and maintaining relationships with key personnel on campus who both have the ability to bring conventions and events to College Station as well as create new opportunities. The Economic Development and Tourism Plan of Work outlines Collegiate Short Courses at Texas A&M as a priority for staff. The expectation of working in partnership to create short courses is those events can live and grow here rather than being bid on competitively.

7. Experiential Marketing

Experiential marketing supports both tourism and economic development by creating hands-on opportunities for potential visitors to engage with College Station in an authentic way. These events not only drive visitation and spending but also serve as valuable platforms for FAM trips and recruitment, allowing meeting planners, sports organizers, businesses and key stakeholders to experience the city in a creative out-of-the-box way.

Visit College Station is proposing a series of pop-up events at Texas A&M football games, local festivals and major events like the Houston Livestock Show & Rodeo or SXSW, bringing College Station to key audiences. Offering local food samples, exclusive giveaways and interactive experiences encourages social sharing and brand engagement. By creating immersive and shareable experiences, experiential marketing leaves a lasting impression, transforming interest into action and positioning College Station as a dynamic destination.

8. Holiday Kickoff

As part of our goal to attract and develop new signature events that drive tourism while also enriching the local community, this new Christmas event will serve as the official launch of the holiday season in College Station, drawing visitors and residents to College Station for a high-impact celebration. The event will prospectively feature a program that could include musical guests and performances, the lighting of the City's official Christmas tree and a choreographed light show projected onto City Hall, creating a visually stunning and engaging experience.

A key feature of the event will be an interactive art installation, designed to enhance visitor engagement and remain on display throughout the holiday season, providing an ongoing attraction that drives foot traffic. This installation will encourage social sharing and repeat visits, adding long-term value beyond the event itself.

This investment supports economic impact by increasing seasonal visitation, encouraging overnight stays and strengthening College Station's position as a holiday destination. With a focus on community engagement and tourism growth, this event will set the foundation for an annual tradition that attracts regional audiences and enhances the city's holiday offerings.

9. Music Sponsorship

We would like to welcome back The Texas Music Scene and have the opportunity to sponsor the 16th season of The Texas Music Scene for 13 weeks. This sponsorship includes a prominent 30-second promotional spot during each episode, featuring Visit College Station, as well as prime visibility through the opening and closing sponsor billboards. Marketing exposure includes television (estimated 18M impressions), social, and digital media.

The Texas Music Scene is a dynamic, half-hour live music television series that airs weekly in over 21.5 million households across Texas and parts of the U.S. The show is a celebration of the best in alt-country, Americana, folk, and songwriter-driven roots music. Each episode features three talented bands or solo artists, offering live performances and engaging on-camera discussions.

As part of the sponsorship, a taping event will be held at a local venue, further increasing the exposure of the vibrant music industry in College Station.



CITY OF COLLEGE STATION

PROPOSED ANNUAL BUDGET

2024 - 2025

CITY OF COLLEGE STATION

FISCAL YEAR 2024-2025 PROPOSED BUDGET COVER PAGE AS PROPOSED ON JULY 8, 2024

In accordance with Texas Local Government Code, Sec. 102.005, a proposed municipal budget must contain a cover page that includes the following statement. The revenues described are calculated using the latest property value estimate received at the time of publication.

This budget will raise more total property taxes than last year's budget by \$5,212,000 or 7.4%, and of that amount \$1,486,000 is tax revenue to be raised from new property added to the tax roll this year.

The above amounts are estimated and will not be final until the approved document is prepared.

CITY OF COLLEGE STATION, TEXAS BUDGET FOR FISCAL YEAR 2025

OCTOBER 1, 2024 TO SEPTEMBER 30, 2025



Elected Officials

Mayor

John Nichols

City Council Place 1

Mark Smith

City Council Place 2

William Wright

City Council Place 3

Linda Harvell

City Council Place 4

Elizabeth Cunha

City Council Place 5

Bob Yancy

City Council Place 6

Dennis Maloney

Mayor Pro Tem

PRINCIPAL CITY OFFICIALS, OCTOBER 2024

City Administration



City Manager

Bryan C. Woods

Deputy City Manager

Jeff Capps

Assistant City Manager/CFO

Jeff Kersten

Assistant City Manager

Jennifer Prochazka

Chief Development Officer

Michael Ostrowski

City Secretary

Tanya Smith

Internal Auditor

Ty Elliott

City Attorney

Adam Falco

Chief of Police

Billy Couch

Fire Chief

Richard Mann

Director of Public Works

Emily Fisher

Director of Parks and Recreation

Kelsey Heiden

Director of Planning and Development

Anthony Armstrong

Chief Information Officer

Sam Rivera

Director of Fiscal Services

Mary Ellen Leonard

Director of Capital Projects

Jennifer Cain

Director of Public Communications

Colin Killian

Director of Community Services

Debbie Eller

Director of Human Resources

Alison Pond

Director of Electric Utility

Timothy Crabb

Director of Water Services

Gary Mechler



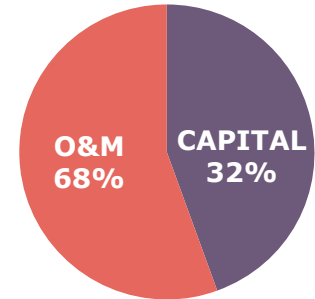
CITY OF COLLEGE STATION
Home of Texas A&M University®

PROPOSED ANNUAL BUDGET

2024 - 2025

PROPOSED EST. HOUSEHOLD TAX RATE 51.3086¢
No Change

TOTAL BUDGET: \$540.5M



GROWTH AFFECTING THE FY25 BUDGET



UNIVERSITY GROWTH
Enrollment on campus ↑



RESIDENT GROWTH
80% since 2000 ↑



COMMUNITY LIVING DEMANDS
Reliable infrastructure needs
and community activities ↑

ESTIMATED PROPERTY VALUES



\$14.8B in taxable value
\$289.7M in new value

ANNUAL ESTIMATED PROPERTY TAX BILL



56% CSISD
24% College Station
20% Brazos County

SALES TAX PROJECTIONS

FY23 ACTUAL	FY24 PROJECTION	FY25 BUDGET
\$40.0M	\$40.8M	\$41.3M



GENERAL FUND REVENUES

34% sales taxes
35% property taxes
18% other revenues
13% utility transfer

GENERAL FUND EXPENSES

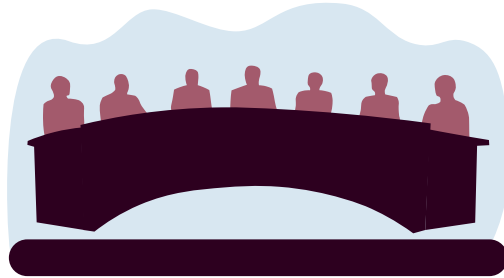
48% Public Safety (Police, Fire, EMS)	5% Fiscal Services
10% Parks & Recreation	5% Planning & Development Services
9% General Government	5% Other Expenses
7% Information Technology	4% Capital Projects Operations
7% Public Works	

UTILITY RATE CHANGES

↑ 10% increase in water rates
No increase in electric rates & sewer
3.5% increase in other rates



COUNCIL STRATEGIC PLAN FY25 STRATEGIES



CITY COUNCIL MISSION

On behalf of the citizens of College Station, home of Texas A&M University, we will continue to promote and advance the community's quality of life.

COMMUNITY VISION

College Station, the proud home of Texas A&M University and the heart of Aggieland, will serve as an example of a vibrant, forward thinking, knowledge-based community, that promotes the highest quality of life.

CORE VALUES

- The health, safety, and general well-being of the community.
- Excellence in customer service.
- Fiscal responsibility.
- Citizen involvement and participation.
- Collaboration and cooperation.
- Regionalism as an active member of the Brazos Valley community and beyond.
- Activities that promote local autonomy.
- Plan and collaborate with Texas A&M University.

WHY HAVE A PLAN?

To maintain and enhance College Station's high quality of life and unique community character, the College Station City Council works closely with residents and the city's experienced management team to plan for current and future needs. The Strategic Plan identifies shared priorities and goals and provides a cohesive framework for the annual budget process.

The Strategic Plan's seven initiatives include specific objectives and actions designed to meet the initiatives' goals. The plan also outlines performance measures to mark each initiative's progress and the plan's overall success.



GOOD GOVERNANCE

GOAL THE CITY IS GOVERNED IN A TRANSPARENT, EFFICIENT, ACCOUNTABLE, AND RESPONSIVE MANNER ON BEHALF OF ITS CITIZENS THAT ACTIVELY PROMOTES CITIZEN INVOLVEMENT.

OBJECTIVES: What does this mean for citizens?

- The city conducts business in an open and inclusive fashion.
- The city delivers services in an efficient, practical manner.
- The city actively pursues the aspirations, goals, and expectations of its citizens.
- Citizens are encouraged to serve on city boards, commissions, and other volunteer capacities.
- Citizens are satisfied with city services and facilities.

ACTIONS: How will we achieve success?

- The council will annually review and implement the Strategic Plan.
- The city will ensure all agreements with external entities are fair and beneficial to the citizens of College Station.
- The city will conduct regular citizen surveys about city services and priorities.
- The council will conduct regular internal audits of city services, practices and programs and report the results to the public.
- The city will televise, livestream, and record council meetings.
- Critical governance information such as plans, budgets, ordinances, expenditures, etc., will be available on the city's website and in city offices.
- The council will ensure its funding partners remain wise stewards of tax funds.
- The council will adopt and adhere to a series of practices for conducting its meetings.
- The city will ensure notices are posted and readily available to the public.
- The city will share information and communicate with citizens about city issues through owned, earned, and paid media.
- The city will implement strategies to engage with the public safely and effectively.



FINANCIAL SUSTAINABILITY

GOAL WISE STEWARDSHIP OF FINANCIAL RESOURCES RESULTS IN THE CITY'S ABILITY TO MEET SERVICE DEMANDS AND OBLIGATIONS WITHOUT COMPROMISING THE ABILITY OF FUTURE GENERATIONS TO DO THE SAME.

OBJECTIVES: What does this mean for citizens?

- The city maintains diverse sources of revenue and a comparable property tax rate for growing cities of comparable size.
- The city maintains adequate reserves to ease the impact of economic fluctuations.
- The city maintains economic competitiveness measured by comparable trends.
- Citizens know where city revenue comes from and how it is spent.
- Citizens are satisfied with city services and facilities.

ACTIONS: How will we achieve success?

- The city will have an annual balanced budget and a diversity of revenue sources.
- The city will endeavor to maintain or improve its bond ratings.
- Enterprise operation rates will be set to meet service demands.
- The city will seek grants and other outside funding.
- The city will strive to maintain and rehabilitate equipment, facilities, and infrastructure on a strategic schedule and establish reserve funds to enable replacement.
- The city will seek the efficient delivery of services and facilities.
- The city will maximize the transparency of expenditures, policies, and procedures.
- The city will conduct routine audits to ensure accountability and maximize efficiency.
- The city will set fees at appropriate levels to recover the costs of service delivery.



CORE SERVICES & INFRASTRUCTURE

GOAL THE CITY'S CORE SERVICES AND INFRASTRUCTURE ARE EFFICIENTLY, EFFECTIVELY AND STRATEGICALLY DELIVERED TO ENABLE ECONOMIC GROWTH AND DEVELOPMENT, AND TO MAINTAIN CITIZENS' HEALTH, SAFETY AND GENERAL WELFARE.

OBJECTIVES: What does this mean for citizens?

- The city has few utility failures and outages.
- The city reduces crime and fear of crime, including risk of injury or property damage.
- The city protects life and property.
- City services and facilities are adequate in size, location, and timing.
- City services and utilities are safe and efficient.
- The city assists at-risk and low-income residents.
- Citizens are satisfied with city services and facilities.

ACTIONS: How will we achieve success?

- The city will maintain program accreditations and certifications.
- The city will attract and retain professional staff and be an employer of choice.
- The city will guide private and public land use for business development.
- The city will plan for, maintain, and invest in the infrastructure, facilities, services, personnel, and equipment needed to meet projected needs and opportunities.
- The city will provide immersive learning experiences for citizens.
- The city will use technology to deliver services effectively and efficiently.
- The city will continue to support community development agencies that demonstrate good stewardship of public funds.
- The city will continue to support fair and workforce housing programs.
- The city will explore potential partnerships to enhance core services.



NEIGHBORHOOD INTEGRITY

GOAL THE CITY'S NEIGHBORHOODS ARE LONG-TERM, VIABLE, SAFE, AND APPEALING.

OBJECTIVES: What does this mean for citizens?

- The city has diverse housing choices, and property values are stable or increasing.
- The city strives to ensure citizens are satisfied with the quality of life in their neighborhoods.
- The city strives to mitigate the negative impacts of neglected properties.
- Citizens have numerous opportunities to actively engage in decisions affecting their neighborhoods.

ACTIONS: How will we achieve success?

- The city will strive to have proactive code enforcement.
- Federal and state funds will be used to help provide workforce housing and address community development needs and opportunities.
- The city will use a geographic-based approach to deliver police services.
- The Police Department's Community Enhancement Unit will provide proactive neighborhood support.
- The city will continue to invest in the maintenance and rehabilitation of neighborhood infrastructure and facilities.
- The city will continue its partnerships with Texas A&M University to educate renters.
- The city will expand mobile-ready technologies to inform citizens and engage them on city issues and concerns.
- The city will continue to plan with neighborhood residents to address concerns and capitalize on opportunities.
- The city will continue to support and partner with homeowner and neighborhood associations to proactively address their priorities and interests.



DIVERSE & GROWING ECONOMY

GOAL THE CITY'S DIVERSE ECONOMY GENERATES HIGH-QUALITY, STABLE JOBS THAT STRENGTHEN THE SALES AND PROPERTY TAX BASE AND CONTRIBUTE TO AN EXCEPTIONAL QUALITY OF LIFE.

OBJECTIVES: What does this mean for citizens?

- The city's annual taxable value increases.
- The city's annual sales tax and hotel occupancy tax receipts increase.
- The number of high-paying, full-time private sector jobs increases.
- Adequate, serviceable land is available for economic development opportunities.
- Opportunities are available for starting and operating businesses.
- The city will foster a culture of entrepreneurship.

ACTIONS: How will we achieve success?

- The city will support, expand, and diversify a consumer-oriented economy.
- The city will protect major economic assets from incompatible encroachments.
- The city will support efforts to expand and enhance broadband internet services.
- The city will support diverse, business-to-business services.
- The city will expand and diversify efforts to generate job growth.
- The city will plan and invest in infrastructure, facilities, services, personnel, and equipment needed to meet projected needs and opportunities.
- The city will ensure business impacts are considered in the development of regulations and standards.
- The city will ensure adequate, serviceable land is available for economic needs.
- The city will maintain and increase relationships with local, regional, and public/private economic partners.
- The city will promote the College Station brand through business recruitment and destination marketing efforts.
- The city will continue to develop and promote signature events, features, and venues for residents and visitors.



IMPROVING MOBILITY

GOAL THE CITY HAS A SAFE, EFFICIENT, SUSTAINABLE AND WELL-CONNECTED MULTIMODAL AND INNOVATIVE TRANSPORTATION SYSTEM WHICH CONTRIBUTES TO A HIGH QUALITY OF LIFE AND IS SENSITIVE TO SURROUNDING USES.

OBJECTIVES: What does this mean for citizens?

- The city increases the number of safe and complete ways to travel in town.
- The city increases the enforcement of traffic offenses in an effort to decrease vehicle accidents.
- City streets are not heavily congested for extended periods of time.
- City streets, sidewalks, bike lanes, and multi-modal paths are well-maintained and free of hazards.

ACTIONS: How will we achieve success?

- The city will provide streets which safely accommodate multimodal transportation.
- The city will ensure streets and sidewalks have features which promote pedestrian and bicycle safety.
- The city will seek transit opportunities through partnerships.
- The city will provide for land uses which support multimodal opportunities.
- The city will plan for infrastructure which meets projected growth and development.
- The city will seek federal and state funds to construct facilities.
- The city will make investments to help avoid long periods of traffic congestion.
- The city will promote a well-connected system of residential streets and collector avenues to ease the strain on expensive arterial boulevards.
- The city will identify and fund a multi-year capital improvements program.
- The city will maintain and rehabilitate the system to avoid costly replacement.
- The city will maximize the system's efficiency, including intersection improvements, traffic signal timing and signage.



SUSTAINABLE CITY

GOAL THE CITY'S CONSERVATION AND ENVIRONMENTAL AWARENESS IS FISCALLY RESPONSIBLE AND RESULTS IN A REAL AND TANGIBLE RETURN ON INVESTMENT.

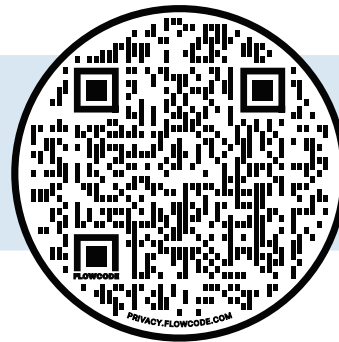
OBJECTIVES: What does this mean for citizens?

- The city utilizes and purchases power from renewable energy sources.
- The city reduces energy and water consumption.
- The city reduces the volume of waste generated.
- The city uses land efficiently, effectively, and equitably.
- The city protects vulnerable environmental features.
- The city reduces the risk associated with flooding and other natural hazards.

ACTIONS: How will we achieve success?

- The city will enhance its conservation and recycling efforts.
- The city will utilize renewable energy.
- The city will purchase renewable energy.
- The city will protect its potable water supply and its ability to meet projected demands.
- The city will conduct sound land use planning guided by its Comprehensive Plan.
- The city will increase participation in FEMA's Community Rating System program.
- The city will acquire flood-prone areas and their associated riparian areas through its Greenway Acquisition program.
- The city will seek grants and other sources of outside funding to support sustainability efforts.
- The city will encourage education about city conservation efforts and programs.
- The city will invest in co-production in service delivery where applicable.
- The city will identify strategies to utilize publicly owned land for future investments.

View the full City Council Strategic Plan at
cstx.gov/CouncilStrategicPlan.



FY25 Strategies

GOOD GOVERNANCE

- Increase transparency and improve the public's ability to participate in government through efforts such as continuing to offer virtual options for public meetings, providing a centralized calendar for public meetings and events, and allowing citizens to book city facilities from the city's website.
- Work with College Station ISD to form a joint legislative committee.
- Explore annexation opportunities.

FINANCIAL SUSTAINABILITY

- Explore and pursue methods of diversifying the city's sources of revenue.
- Consider alternative infrastructure funding opportunities.

CORE SERVICES & INFRASTRUCTURE

- Evaluate options for a community recreation center.
- Explore opportunities for a conference center or convention center.
- Increase and expand programming in our parks system.
- Begin planning and design of Southwest Park.
- Consider opportunities for Southeast Park and options for expanded baseball fields.
- Make infrastructure improvements in aging areas.

NEIGHBORHOOD INTEGRITY

- Provide options for affordable, dense housing in Northgate, Wolf Pen Creek, and other targeted areas to relieve housing pressure in existing neighborhoods.

DIVERSE & GROWING ECONOMY

- Expand and diversify efforts to attract high-quality, stable jobs.
- Find opportunities to connect Century Square with Hensel Park.
- Pursue options for redevelopment of Wolf Pen Creek corridor and Post Oak Mall.
- Expand Christmas in College Station.
- Improve infrastructure, programming, and opportunities in the Northgate area.
- Add gateway signage at every major entrance to College Station.

IMPROVING MOBILITY

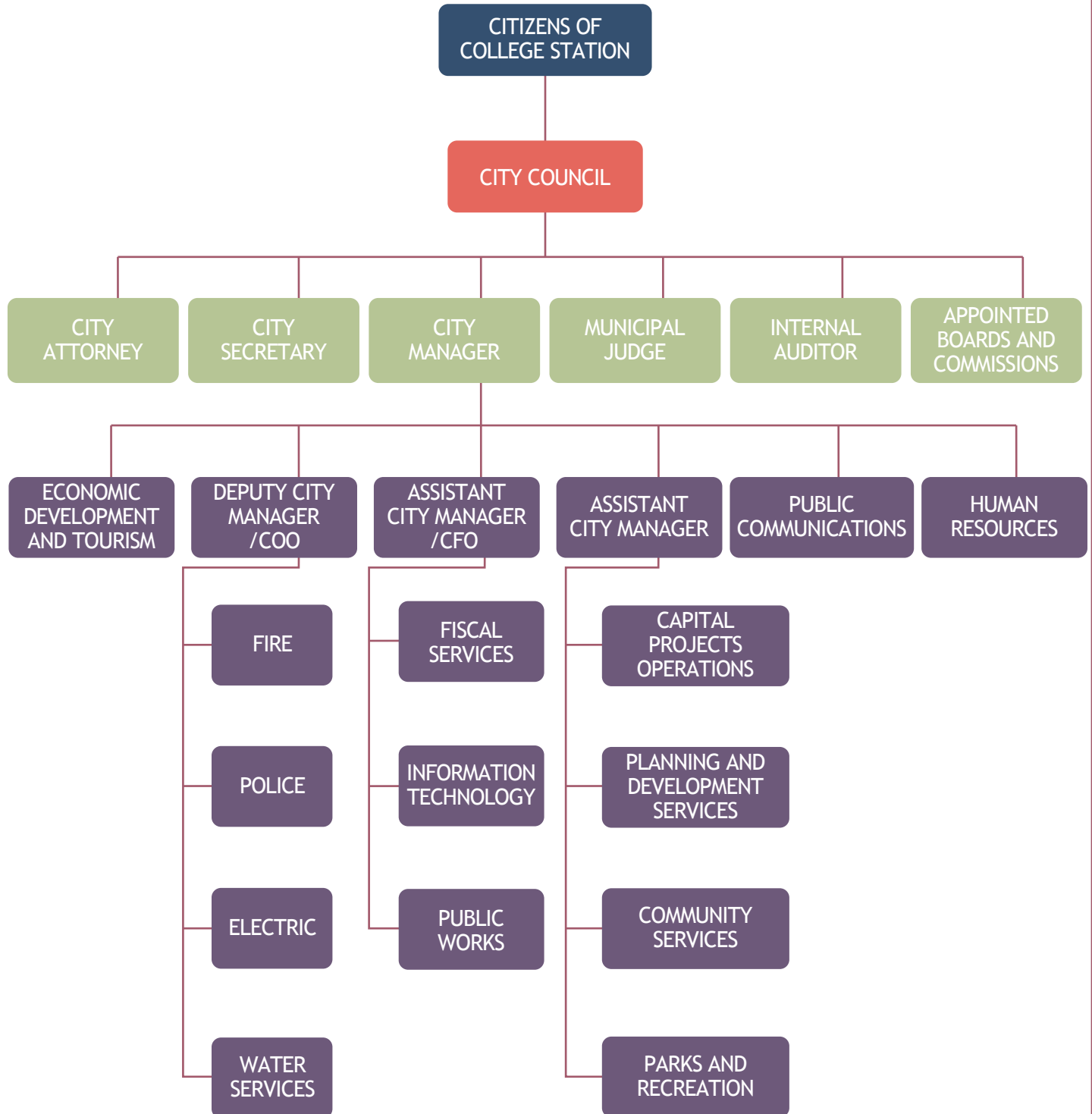
- Expand public transit options and increase multimodal infrastructure.
- Work with contractors to ensure multimodal infrastructure is included in project design.
- Develop a new, broader relationship with Brazos Transit based on federal direction, including the need for local representation.

SUSTAINABLE CITY

- Examine ways to utilize co-production for service delivery.

CITY ORGANIZATION

CITY OF COLLEGE STATION





July 8, 2024

Honorable Mayor and City Council:

I am pleased to present the Fiscal Year 2024-2025 Budget for the City of College Station.

The City of College Station is consistently among places named for its high quality of life, sound fiscal management and value to citizens. The Budget and this document reflect the strong foundation that has been established and the strategic outlook for the future of our community. This budget provides for continued investments in core services, critical infrastructure and quality of life while reducing the annual operations and maintenance spending when compared to inflation. Through a continuous process of strategic direction by the City Council, citizen feedback, and input from staff leadership and subject matter experts we have compiled what we believe to be a plan that will allow us to continue on a positive trajectory while meeting the short and long-term challenges ahead.

BUDGET SUMMARY

The Fiscal Year 2024-2025 Net Budget for the City of College Station totals \$540,511,673 for all funds. \$366,160,031 is included for the operations and maintenance budget, and \$174,351,642 is included for the capital budget. Compared to FY24, the operating and maintenance budget increased approximately 2.5% while the capital budget increased 29%. The Budget was prepared using policy direction from the City Council through the Strategic Plan, Fiscal and Budgetary Policies, and previous City Council policy direction.

COUNCIL STRATEGIC INITIATIVES

Council directed staff to develop the Budget to address the following strategic goals:

- A City governed in a transparent, efficient, accountable, and responsive manner on behalf of its citizens that actively promotes citizen involvement.
- Wise stewardship of financial resources so the City can meet services demands and obligations without compromising future generations' ability to do the same.
- The City's core services, and infrastructure are efficiently, effectively and consistently delivered to enable economic growth and development, and to maintain citizens health, safety, and general welfare.
- The City's neighborhoods are long-term, viable, safe, and appealing.
- The City's diverse economy generates high-quality, stable jobs that strengthen the sales and property tax base and contribute to an exceptional quality of life.
- Conservation and environmental awareness that is fiscally responsible and results in a real and tangible return on investment.

FOCUSED ON THE FUTURE

Significant changes and unique local demands on City services will impact the FY25 Budget. The Budget lays the foundation to address these challenges both in the short-term and into the future.

- **Public Safety Investments:** While we have consistently made investments in public safety above their proportionate amount of the budget, the expansion of fire services and the desire to reach a better proactive policing ratio necessitates significant investment beyond what future budgets can support without an additional revenue source.
- **Partner & Outside Agency Funding:** COCS provides substantial funding for both taxpayer supported governmental organizations and non-profits in the Brazos Valley. Annual examination of these relationships and the cost/benefit of each is critical.
- **Water Supply & Demand:** The demand for water in our area and the exporting to other regions continues to put pressure on our water supply. Substantial investments in infrastructure as well as strategic planning related to growth and conservation will be required to maintain our high quality of service and provide for our future water needs.
- **City & University Growth:** Texas A&M had a record Fall 2023 enrollment of 71,127 at the College Station campus and anticipates exceeding that enrollment in Fall 2024. As of April 2024, the estimated City population is 128,758. P&DS projects a population growth of 2,500 residents annually.
- **State Legislative Impacts:** Legislative changes related to local control, land use, and municipal financing impacts the Council's ability to provide critical decision-making for College Station.

FUNDING REQUESTS

- The Budget includes various funding requests related to new capital infrastructure, including a new Public Works Operations Center, relocated City baseball fields, the planned construction of Fire Station #7, and additional parks amenities and multi-use paths/trails.
- Additional operational staffing for Fire Station #7 will be considered in a future fiscal year, as well as additional Police officers above those that are added annually to keep up with organic growth.
- The Budget also includes pay adjustments for current staff while holding the cost of healthcare insurance steady to address workforce changes in the local marketplace. Also included is a TMRS adjustment for eligible retirees.
- The City must also consider increased operating costs due to events held at Texas A&M. These events rival the impact of football games and require additional or expanded City services.
- Other coordination and shared cost items in the Budget include Outside Agency funding and a library ILA with the City of Bryan. We have started receiving funding requests from other organizations outside of the traditional process; as a result, the City may incur additional recurring costs if these requests are granted by Council.

REVENUE SOURCES

- Our overall property tax rate as well as the operations and maintenance portion of the tax rate continue to be low when compared to our peers. Additional property tax revenue could help to fund future requests such as additional public safety investments.
- Sales tax is expected to see moderate and consistent growth in the near future but that growth is impacted by inflation and the rising costs of materials and services critical to basic governmental operations.
- Tourism and visitor spending in conjunction with the work done by Visit College Station, Texas A&M University and our private sector partners provides additional revenue to the COCS.

- The Water utility rate has not increased since 2020 but will require an increase in FY25 to address the cost of building new wells, rehabilitating existing wells, and building the related collection lines to secure our current and future water supply.

GROWING CAPITAL NEEDS

- The growth of our city, the need to replace infrastructure at the end of its life and maintaining a high quality of life will necessitate additional capital projects. These include projects supported by the property tax rate and others supported by utility revenues.
- New projects include expanded roads, additional City facilities and improvements, rehabilitated Parks amenities, traffic signals, and the replacement of Public Safety radios.
- Also included to address the mobility and alternative transportation methods are funds for sidewalks, multi-use paths, and bike lanes.
- Utility projects include Electric transmission line relocations and a new substation as well as the construction of 3 new water wells and related collection lines. Also forecasted are additional well rehabilitation projects.

PROPERTY VALUATIONS

Administered by a chief appraiser, the taxable value within the City is determined by a county agency as of January 1 of each year. Market conditions and other factors determine that valuation. For College Station, the Brazos Central Appraisal District (BCAD) provided a preliminary property valuation number in April for property within City limits. The estimated preliminary values provided by BCAD were used to prepare the FY25 Proposed Budget. Total taxable values before the freeze adjustment are approximately \$14.8 billion dollars. Estimated new value added to the tax rolls as of January 1, 2024, totaled \$289,700,394. The net taxable valuations on existing property assessed by BCAD increased by 7.14% over prior year values.

COMPENSATION AND BENEFITS

The City of College Station desires to be the “employer of choice” and a leader in recruiting and retaining the top talent in our region. The City Council has continued to support this vision by providing the resources for competitive compensation and addressing non-financial compensation. Strategies to address competition in the marketplace include:

- Pay scales will increase 3.0% for all employees. There is a 1.5% - 3.0% step increase for public safety and step plan employees. There is a 1.0% market adjustment and .5% performance pool (only top 25%) for non-step employees.
- Adopting a new benefit provided by the Texas Legislature for personnel eligible to retire from the City.
- Added non-monetary compensation such as variable work schedules, wellness benefits, hiring incentives and more.
- Continuing to hold the cost of healthcare insurance to employees flat for the 5th consecutive year and providing an Employee Health Clinic at no cost.

The employee health benefit package includes one Preferred Provider Organization (PPO) option and one High Deductible option. Holding the cost of healthcare insurance to employees flat for the 5th consecutive year is a significant benefit as health care costs have skyrocketed since 2020.

KEY SERVICE LEVEL ADJUSTMENTS

As a growing service organization, the City's salaries, and benefits account for approximately 71% of General Fund operating expenses and 60% of total operating expenses. This budget also proposes an additional 23 Full-Time Equivalents (FTEs), and other Service Level Adjustments (SLAs). In addition the initial 12 firefighter positions for the Station #7 will be added through a budget amendment. These requests, among others, include:

- **Fire** - 12 Firefighters (to be added in Spring FY 25 budget amendment), an improved alert system and electric vehicle blankets.
- **Police** - 2 Police Officers (partially grant funded); 1 K9 Officer; 1 Support Assistant; and various software and technology licenses.
- **Public Works** - 1 additional dump truck, a small pad foot roller, an additional Traffic technician, and additional traffic calming funds.
- **Parks** - 1 Volunteer/Engagement Coordinator, various equipment and supplies, and a Wolf Pen Creek Masterplan Study.
- **Fiscal Services** - 3 new positions, including a new payroll specialist, a full-time payables clerk, an additional buyer.
- **Municipal Court** - 2 deputy court clerks, and a vehicle upgrade for the Court marshals.
- **Water Services** - includes 3 positions in Water-Wastewater, 2 of which will help maintain the City's Wastewater treatment plants.
- **Drainage** - 2 additional positions, a crew leader and an equipment operator to help assess and maintain the City's drainage infrastructure.
- **Fleet Maintenance** - 2 additional after-hours maintenance technicians to provide additional service for City vehicles.
- **Capital Projects Operations and Facilities** - 1 additional Facilities Asset Manager.

Additional detail regarding departments' SLAs are included in the Executive Summary, the departmental narratives in this document, and in Appendix B.

PROPERTY TAX RATE

Property or Ad Valorem Tax revenue accounts for approximately 36% of General Fund revenues. General Fund revenues pay governmental services, including public safety, public works, parks, and other community needs.

As a result of legislative changes from prior years, the City is limited to a 3.5% increase in the O&M tax revenue without going out for an election. The Proposed FY25 property tax rate is 51.3086 cents per \$100 of assessed valuation; the same as the rate approved with the FY24 Budget.

The increase in property valuations coupled with the tax rate will result in approximately \$3,726,000 of additional revenue to fund governmental operations. The estimated revenue raised from new property added to the tax roll this year is approximately \$1,486,000.

The proposed ad valorem tax rates per \$100 of assessed valuation is as follows:

	Current Rate	Change	Proposed Rate
Debt Service Fund	21.1442	0.0000	21.1442
General Fund	30.1644	0.0000	30.1644
Total	51.3086	0.0000	51.3086
Estimated No-New-Revenue Rate	45.5159		50.0202
Estimated Voter Approval Rate	51.3086		52.4914
Rates above are in cents per \$100 assessed valuation			

The no-new-revenue rate is a benchmark tax rate needed to raise the same amount of maintenance and operations property taxes on existing property as the previous year, after accounting for changes in the appraised values. The voter-approval tax rate is the tax rate that requires a city to hold an automatic election on the November uniform election date if it adopts a rate exceeding that rate. No-New-Revenue and Voter Approval rates will not be finalized until the first week in August 2024.

ENTERPRISE FUNDS

The City provides the following utilities: Electric, Water, Wastewater, Roadway Maintenance, Solid Waste, and Drainage. For FY25, the budget is proposing a 10.0% increase in water rates to address the capital needs to secure future water supplies. FY25 Electric, and Wastewater rates remain unchanged. We anticipate additional rate increases will be needed for the Water utility to fund the new wells, water collection lines and well rehabilitation projects needed to secure our current and future water supply.

The Roadway Maintenance, Solid Waste, and Drainage fees are indexed to the Consumer Price Index - All Urban Areas (CPI-U) to keep pace with inflation which rose approximately 3.5% during the last year. Therefore, an increase of 3.5% is also included for these three utilities.

CAPITAL PROJECTS

The Capital Improvements Project Budget totals \$174.3 million for all funds that include capital projects. These capital appropriations can span multiple fiscal years as projects progress. As a result, these appropriations may not equal projected expenses in FY25. These capital projects will help the City meet its strategic goals while providing proper transportation, park, utility, and facility infrastructure for a growing population. Specific capital projects, funding sources, and projected expenses are presented in the Capital Projects section of this document.

During the November 2022 bond election, voters approved three of the five bond propositions, funding projects totaling \$56.1 million. The FY25 Budget includes additional General Obligation bonds for these projects. We anticipate starting construction on several of these projects in FY25, including the Bachmann Senior/Little League Buildings.

The FY25 capital budget increased 29% due to the significant budgets needed for the new water well and rehabilitation projects. We anticipate additional increases in Water's capital project budget over the next few years. The capital budget also increased due to moving voter approved projects into the construction phase and initiating projects to address current operational and community needs.

CONCLUSION

For the coming fiscal year, the budget seeks to address ongoing operational needs and demands. At the same time, the budget lays the groundwork to address possible future funding challenges and projected needs, both from our residents and the broader community. As a City, we are contending with increased demands for services from outside organizations, increasing pressure from general population and student body growth, and increasing operational costs and higher interest rates. However, with the support of the City Council and community, we remain confident in our ability to maintain our service delivery for our residents in FY25 and the years to come.

This document, and the effort required to produce it, would not be possible without the expertise and dedication of those who have prepared it. I would like to personally thank the Finance Department as well as the Management Team throughout the organization for all the time, effort, and crucial input they provided in preparing this Budget.

In closing, I appreciate the leadership of the City Council, hard work of City staff and the continued resiliency and support of the community. While there will inevitably be challenges and opportunities that necessitate changes in FY25, I believe this budget represents the best path forward to position the City for continued success in the future.

One City, One Team

Sincerely,



Bryan C. Woods

City Manager

NEW POSITIONS IN THE FY25 BUDGET

Approximately 60% of total City operating expenses (excluding Purchase Power in the Electric Fund) are salaries and benefits. In the General Fund, these costs account for approximately 71% of operating expenses. ***Twelve firefighters will be added to the budget via a Budget Amendment during FY25 with costs showing up in FY26.**

The FY25 Budget includes funding for 23 new positions with another 12 firefighters to be added via budget amendment:

Dept	One-Time Cost	Recurring Cost	Total	Increase FTE	Vehicle
Planned FY25 Budget Amendment					
Fire Station #7 Staffing*	\$277,270	\$1,241,260	\$1,518,530	12.0	-
FY25 Proposed Budget					
Police	\$353,379	\$524,321	\$877,700	4.0	2
Public Works	-	75,649	75,649	1.0	-
Parks	-	117,889	117,889	1.0	-
Capital Projects Operations	42,810	136,743	179,553	1.0	1
Fiscal Services	5,620	233,434	239,054	3.0	-
Municipal Court	5,620	133,980	139,600	2.0	-
Total General Fund	407,429	1,222,016	1,629,445	12.0	3
Fleet Maintenance Fund	5,900	219,192	225,092	3.0	-
Hotel Tax Fund	2,810	113,879	116,689	1.0	-
Drainage Fund	89,500	172,974	262,474	2.0	1
Electric Fund	52,810	209,974	262,784	1.0	1
Water Fund	4,810	135,621	140,431	1.0	-
Wastewater Fund	80,000	169,034	249,034	2.0	1
Solid Waste Fund	492,543	251,289	743,832	1.0	1
Grand Total (All Funds)	\$1,135,802	\$2,493,979	\$3,629,781	23.0	7

The FY25 Budget reflects the impact of positions that were reclassified, reallocated or exchanged with other departments in order to meet service requirements. The current Appendix C details the City's 1071.5 Full and Part Time positions by department and fund. These totals may change as Council may approve additional positions via Budget Amendments or when departments reorganize their divisions.

Temporary/seasonal and part-time non-benefitted (PTNB) employees are budgeted by calculating the number of hours worked compared to historical costs. Most PTNB positions are in the Parks and Recreation Department for seasonal programs. Other departments also utilize these types of positions to a lesser extent. A table detailing the specific types of these positions is included in Appendix C.

SERVICE LEVEL ADJUSTMENTS (SLA)

In addition to the positions discussed above, departments requested additional expense adjustments to meet the needs of our growing City. Departments are required to submit Strategic Goals or operational Key Performance Indicators to justify the request. The below requests are included in the FY25 Budget. As a result, the included SLAs, detailed below, will help departments meet current service levels. Further details are included in the departmental summaries and in Appendix B.

Dept	One-Time Cost	Recurring Cost	Total	Vehicle
General Fund				
Police	\$14,800	\$13,700	\$28,500	-
Fire	25,550	8,064	33,614	-
Public Works	438,800	280,300	719,100	2
PARD	260,000	46,000	306,000	5
P&DS	229,125	3,000	232,125	-
IT	13,400	24,400	37,800	-
Fiscal Services	35,000	9,300	44,300	-
General Govt - City Attorney	-	10,775	10,775	-
General Govt - City Manager	15,000	-	15,000	-
General Govt - City Secretary	-	25,000	25,000	-
General Govt - Human Resources	225,000	35,100	260,100	1
General Govt - Tourism Admin	60,000	-	60,000	-
General Govt - Economic Dev	150,000	-	150,000	-
General Govt - Public Communications	85,000	3,500	88,500	-
General Fund Total	1,551,675	459,139	2,010,814	8
Employee Benefits Fund	50,000	-	50,000	-
Hotel Tax Fund	870,000	155,000	1,025,000	-
Drainage Fund	625,000	171,500	796,500	1
Northgate Parking Fund	358,154	7,000	365,154	-
Water Fund	600,000	10,000	610,000	-
Wastewater Fund	350,000	-	350,000	-
Solid Waste Fund	349,425	104,391	453,816	1
Grand Total (All Funds)	\$4,754,254	\$907,030	\$5,661,284	10

FY25 NET EXPENDITURE BUDGET

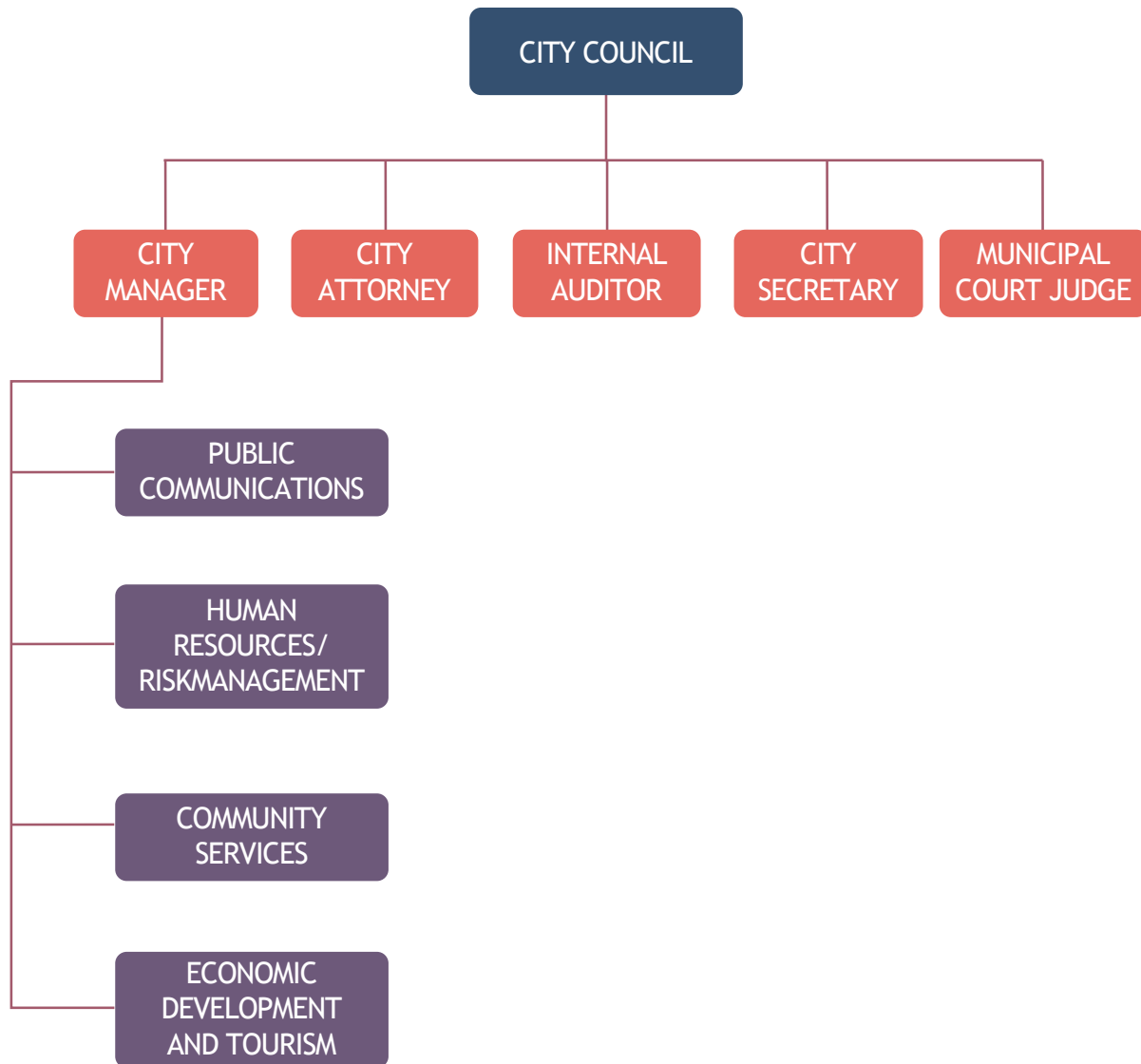
Net Budget Summary			
Fund Type	Net Budget		
Governmental Funds	\$151,754,058		
Enterprise Funds	186,207,217		
Special Revenue Funds	28,198,756		
	Subtotal O&M	\$366,160,031	
	Subtotal Net Capital	\$174,351,642	
Total Net Budget	\$540,511,673		

Fund	Approved FY24 Budget	Proposed FY25 Budget	% Change
General Fund	\$117,471,784	\$120,931,703	2.95%
Electric Fund	129,056,385	125,564,420	-2.71%
Water Fund	22,036,956	23,090,891	4.78%
Wastewater Fund	19,025,254	19,907,048	4.63%
Solid Waste Fund	14,948,811	15,557,401	4.07%
Drainage Fund (O&M)	3,277,852	4,202,652	28.21%
Roadway Maintenance Fund	6,577,783	6,877,900	4.56%
Debt Service Fund	29,011,900	30,513,245	5.17%
Hotel Tax Fund	7,146,421	7,662,823	7.23%
Northgate Parking Fund	1,779,646	2,087,457	17.30%
Police Seizure Fund	33,080	283,080	755.74%
East Medical District TIRZ #19	-	-	-
Dartmouth Synthetic TIRZ	-	-	-
SW Roadway Impact Fee Funds	-	-	-
SW Water Impact Fee Fund	500,000	600,000	20.00%
SW Wastewater Impact Fee Fund	2,000,000	2,500,000	25.00%
PEG Access Channel Fee Fund	136,000	136,000	0.00%
Municipal Court Funds	132,237	138,773	4.94%
Community Development Fund	3,078,993	5,226,533	69.75%
Federal Relief Fund	400,000	-	-100%
Economic Development Fund	374,100	300,000	-19.81%
Spring Creek Local Govt Fund	-	-	-
Efficiency Time Payment Fund	9,110	9,110	0.00%
R.E. Meyer Fund	20,500	10,000	-51.22%
Fun For All Fund	-	-	-
Texas Ave Cemetery Fund	3,000	3,000	0.00%
Memorial Cemetery Maint. Fund	42,540	42,540	0.00%
Memorial Cemetery Fund	35,000	515,455	1372.73%
Total Net Operating Expenditures	\$357,097,352	\$366,160,031	2.54%
Facilities/IT CIP	6,405,802	16,953,895	164.66%
Parks CIP	2,111,351	14,030,297	564.52%
Streets CIP	18,067,801	30,078,294	66.47%
Electric CIP	24,265,087	31,995,349	31.86%
Water CIP	23,965,493	66,101,007	175.82%
Wastewater CIP	54,435,882	12,742,800	-76.59%
Northgate CIP	100,000	100,000	0.00%
Special Revenue CIP	5,604,000	2,350,000	-58.07%
Total Net Capital Expenditures ¹	\$134,955,416	\$174,351,642	29.19%
TOTAL NET EXPENDITURES	\$492,052,768	\$540,511,673	9.85%

¹ Total net capital expenditures includes capital transfers from other funds and net capital appropriations.

GENERAL GOVERNMENT

CITY OF COLLEGE STATION





GENERAL GOVERNMENT DEPARTMENT

The General Government Department includes administrative functions of the City.

MAYOR AND COUNCIL

The **Mayor and Council** Division accounts for expenditures related to Council functions such as education and travel. The city council also establishes policies regarding zoning, parks, master greenway plan and development of annual strategic issues.

CITY SECRETARY

The **City Secretary's Office** provides citizens with public information and implements requests for city records, prepares official minutes for city council meetings, conducts city elections, coordinates boards and commissions appointments, provides staff support to the mayor and council, and manages the council and city secretary budgets.

INTERNAL AUDITOR

The **Internal Auditor** conducts independent financial and performance audits of departments, offices, boards, activities, and agencies of the city to independently determine whether City resources and public funds are utilized efficiently, effectively, economically.

CITY MANAGER OFFICE

The **City Manager's Office** is responsible for the day-to-day operations of the city, offers recommendations to City Council, and provides short- and long-term direction for the organization. This office also includes the **Neighborhood Services Division** that maintains collaborative partnerships among neighborhoods, partner jurisdictions, community organizations, and the city. Associations can develop regular communication with staff regarding area development and city services.



ECONOMIC DEVELOPMENT AND TOURISM

The **Economic Development and Tourism Division** provides guidance for retail planning and developing incentive programs to encourage prospective businesses to locate in the City of College Station. Tourism focuses on selling and marketing events the College Station. They are funded by the Motel Occupancy Tax Fund. In the summer of 2024, College Station and Texas A&M University will be hosting USA Track and Field's Junior Olympic Track and Field Championships. A one-time FY24 SLA will cover the costs of this event out the General Fund. Most of the event expenses will be covered by a state-grant, which will not be received until early 2025.

CITY ATTORNEY

The **City Attorney's Office** provides municipal legal services and support to the City Council and City staff, including legal advice, real estate, contract drafting, open records, municipal court prosecution and litigation.

PUBLIC COMMUNICATIONS

The **Public Communications Division** markets the City's services in ways that appeal to the needs of citizens and keeps them informed, involved, and up to date on the work of the City government.

COMMUNITY SERVICES

The **Community Services Division** is responsible for Community Services Administration, Community Development, Code Enforcement, and Northgate District Management. Community Services seek to deliver high-quality programs, services, and facilities to enrich the lives of College Station residents. Northgate District Management operates a surface parking lot and parking garage in the Northgate area of town. Operations in Northgate are funded by its own enterprise fund.

HUMAN RESOURCES

The **Human Resources Division** consists of Human Resources and Risk Management. The Human Resources Division is responsible for the strategy and implementation of all HR-related functions including recruiting, hiring, training & development, employee engagement, overseeing compensation and benefits programs, and providing support for employee relations, safety, and related policy interpretations. Risk Management seeks to limit City exposure to physical and financial losses through programs that include managing property casualty claims and worker safety programs.

LARRY J. RINGER LIBRARY

In 1986, the Cities of Bryan and College Station signed an inter-local agreement (ILA) for Bryan to operate a branch **library** in College Station. This branch first opened in 1987, and the present location opened in 1998. The College Station Public Library was renamed Larry J. Ringer Library in 2004 in honor of former College Station Mayor Larry J. Ringer, who was very active in establishing the library branch. After years of growth, a newly expanded and renovated Ringer Library facility opened in 2019. As of 2023, the library ILA is managed by the City Manager's Office, previously it was in the Parks and Recreation Department. In FY23, the Ringer Library went over budget due to extenuating one-time costs. This has increased the FY25 payment to the City of Bryan. Bryan Library and Fiscal Services staff estimate that these one-time events will not occur in FY24 and that the FY26 payment will not be as high as FY25. This is reflected in the Five-Year General Fund forecast.



The budget for FY25 includes the following service level adjustments:

<i>Service Level Adjustments</i>	<i>One-Time</i>	<i>Recurring</i>	<i>Total</i>	<i>Strategic Plan</i>	<u>KPI</u>
City Attorney-Summer Law Clerk	\$ -	\$10,775	\$10,775	Goal 2 & 3	KPI 2
City Secretary-Community Sponsorships	25,000	-	25,000	Goal 2	KPI 3
City Manager-History Book	15,000	-	15,000	Goal 4	-
Human Resources-CDL Program Truck	225,000	35,100	260,100	Goal 1 & 2	KPI 2
Economic Development/Tourism-Event Space Supplies	10,000	-	10,000	Goal 4	-
Economic Development/Tourism-Hometown Tailgates	40,000	-	40,000	Goal 3	KPI 3 & 4
Economic Development/Tourism-Lobby Merchandise	10,000	-	10,000	Goal 4	-
Economic Development/Tourism-Master Plan	150,000	-	150,000	Goal 1	-
Public Communications-New City Website	60,000	3,500	63,500	Goal 1, 2, & 3	KPI 2
Public Communications-Citizen Survey	25,000	-	25,000	Goal 1	-
General Government SLAs Total	\$560,000	\$49,375	\$609,375		

KPIs are available at the link in the SLA table or in Appendix K.

- An additional paid law clerk for the summers will increase the productivity of the City Attorney's Office. Moreover, adding this paid position will keep the department competitive and attract qualified law professionals.
- City Secretary's Office will increase the annual budget for community sponsorships. Sponsoring community activities and organizations demonstrates goodwill toward citizens as well as provides marketing for the city at public events.
- The City Manager's Office aims to create a history book of the City of College Station.
- The CDL Program Truck, initiated by Human Resources, will allow the city to finance its own CDL vehicle to utilize in the training program for city employees.
- Event Space Supplies will be used by Economic Development to acquire necessary supplies for hosting functions and events in the 1207 Visitor Center.
- Economic Development is seeking one-time funding for Texas A&M Football tailgates.
- Lobby Merchandise will be used by Economic Development to increase merchandise inventory and improve the aesthetic appeal of the 1207 Visitor Center.
- Economic Development is requesting and update to the city's economic development master plan given economic events in recent years.
- Public Communications is requesting to implement a new city website. This will allow the department to improve the overall functionality and interface of the city's website.
- A citizen survey will be performed by Public Communications to gauge the overall sentiment and priorities of the citizens in College Station.

HOTEL TAX FUND

The Hotel Occupancy Tax Fund (HOT), a consumption tax authorized under state statute, is used to record Hotel/Motel tax revenues. This tax allows the City to collect up to its current tax rate of 7% on rental income of hotels, motels and short-term rentals within the city limits. In accordance with Chapter 351 of the Tax Code, expenditures from this fund must directly enhance and promote tourism and the hotel industry in the City.



REVENUES

Hotel/Motel taxes across Texas and the United States have been increasing the past few years in a good recovery from 2020-2021 when travel had declined drastically. The hotel economy has seen a 15% increase over April 2019 rates nationally (as of April 2024), which reflects in the City of College Station's increase in tax collection in FY23 and FY24. This is due to increased travel but also a high increase in hotel prices due to inflation. Industry leaders expect that this year and recent future year revenue growth should follow the standard CPI inflation rates.

The City and surrounding entities have been at work getting large events in the typically slower summer season. Planned events include an international soccer game and large country concert hosted at Kyle Field in 2024 to be reflected in FY24 revenue estimates. FY25 will also see special events from USA Track and Field and Games of Texas.

OPERATIONAL EXPENSES

Funds Derived from the Hotel Tax Fund can only be spent if the following two-part test is met:

- I. Every expenditure must directly enhance and promote tourism and the convention and hotel industry.
- II. Every expenditure must clearly fit into one of nine statutorily defined categories:
 1. Funding the establishment, improvement, or maintenance of a convention or visitor information center.
 2. Paying for the administrative costs for facilitating convention registration.
 3. Paying for tourism related advertising, and promotion of the city or its vicinity.
 4. Funding programs that enhance the arts.
 5. Funding historical restoration or preservation projects.
 6. Sporting events where the majority of participants are tourists in cities located in a county with a population of 290,000 or less.
 7. Enhancing and upgrading existing sport facilities or fields for certain municipalities.
 8. Funding transportation systems for tourists.
 9. Signage directing the public to sights and attractions frequently visited by hotel guest in the municipality.



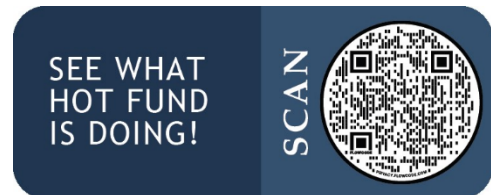
FY25 Proposed Budget Total Expenditures and Transfers*		\$ 7,662,823
1. Visitor Center		190,413
2. Admin Costs for Convention Registration		1,792,615
3. Advertising		1,972,136
4. Arts Enhancement		590,953
5. Historical Restoration		-
6. Sporting Events		3,116,706
7. Upgrading Sports Facilities		-
8. Tourist Transportation		-
9. Signage for public direction to sights and attractions		-

*Some funding may be applicable to multiple categories

Parks Programs and Events: The FY25 budget for Parks Programs and Events includes expenditures related to athletic events such as national & regional athletic tournaments. The budget includes salaries and benefits for employees dedicated to tourism, hosting supplies, field maintenance supplies and staff time to prepare the facilities for each event. The Parks department will again be hosting the Games of Texas in Summer 2025 and Summer 2026. The budget is reflected as a one-time SLA in FY25.

Public Communications: Public Communications staff develops brochures, promotional videos, and other marketing and advertising materials with the primary focus of creating high-quality collaterals to bring tourism dollars to College Station. Expenditures are budgeted for staff time associated with these duties.

Tourism Division: The Tourism Division is focused on supporting the hospitality industry through increased overnight stays and leisure travel and a return to meetings, conventions, and reunions. It includes specialized areas such as conventions, leisure, and sports tourism. Tourism personnel combine sports sales experience with the City's tournament facilitation team, renowned facilities, and marketing expertise. Some employees that cover both the General Fund's Economic Development division and will charge their time into the HOT funded Tourism Division when applicable.



Outside Agency Funding - Several outside agencies are supported each fiscal year to provide services for the citizens of College Station. The amount of funding received by each agency depends on Council direction and the availability of funds. See Appendix J for additional details regarding Outside Agency Funding.

TAMU Preferred Access Payment: The agreement with Texas A&M University for the use of A&M facilities provides that a maximum of \$1.225M be contributed each year between Brazos County and the City. A payment of \$135,700 is budgeted for FY25 and is included in the public agency line of the fund summary.

SERVICE LEVEL ADJUSTMENTS

<i>Service Level Adjustments</i>	<i>One-Time</i>	<i>Recurring</i>	<i>Total</i>	<i>Strategic Plan</i>	<u>KPI</u>
Events Servicing Coordinator	\$ 2,810	\$ 113,879	\$ 116,689	Goal 3	KPI 2
HOT Grants	120,000	-	120,000	Goal 3	KPI 1
Tourism Marketing and Advertising	-	100,000	100,000	Goal 3	KPI 1
Visitor Guides and Digital Marketing Content	55,000		55,000	Goal 3	-
Games of Texas Summer 2025	750,000	-	750,000	Goal 1	KPI 1
HOT Fund SLAs Total	\$ 927,810	\$ 213,879	\$1,141,689		

KPIs are available at the link in the SLA table or in Appendix K.

Additions to the FY25 budget for the Tourism Division and Parks Department:

- An additional Events and Servicing Coordinator position is to work with the entire Tourism Division to support convention sports clients and creating new programming for tourism events.
- A one-time increase to the available funds for HOT Grants for tourism events in College Station.
- A recurring expense to allocate towards digital marketing and targeted advertising efforts.
- Print new visitor guides to give to people at events and those who come to the visitor center along with digital scrolling information to be presented at the visitor center and online.
- The Texas Amateur Athletic Federation Games of Texas is made up of over 150 municipal parks and recreation departments and various other local and state organizations that offer athletic competition. TAAF conducts the athletic programs for teams and individuals once they advance from local competition. TAAF has 17 regions holding sports competition with the top finishers qualifying to advance to the sport's state championship at the Games of Texas. This event is expected to provide an economic impact greater than \$8 million per year to the College Station community. College Station will host in 2026 as well with similar one-time funding.



CITY OF COLLEGE STATION

HOTEL TAX FUND SUMMARY

	FY23 Actual	FY24 Revised Budget	FY24 Year-End Estimate	FY25 Base Budget	FY25 Proposed SLAs	FY25 Proposed Budget	% Change Budget FY24 to FY25
Beginning Fund Balance	\$ 12,359,179	\$ 14,383,060	\$ 14,383,060	\$ 15,702,738		\$ 15,702,738	
Revenues							
Hotel Tax	\$ 7,362,872	\$ 6,900,000	\$ 7,857,000	\$ 8,400,000	\$ -	\$ 8,400,000	21.74%
Investment Earnings	570,662	400,000	637,000	700,000	-	700,000	75.00%
Misc Non-Operating	8,298	10,000	10,000	10,000	-	10,000	0.00%
Total Revenues	<u>\$ 7,941,831</u>	<u>\$ 7,310,000</u>	<u>\$ 8,504,000</u>	<u>\$ 9,110,000</u>	<u>\$ -</u>	<u>\$ 9,110,000</u>	<u>24.62%</u>
Total Funds Available	<u>\$ 20,301,010</u>	<u>\$ 21,693,060</u>	<u>\$ 22,887,060</u>	<u>\$ 24,812,738</u>	<u>\$ -</u>	<u>\$ 24,812,738</u>	<u>-</u>
Expenditures:							
Parks & Recreation Dept	567,818	766,234	814,660	783,501	750,000	1,533,501	100.13%
Fiscal Services Dept	32,577	35,000	87,286	56,000	-	56,000	60.00%
General Govt Dept*	3,558,062	4,470,220	4,149,219	4,167,200	391,689	4,558,889	1.98%
Pay Plan Contingency	-	3,747	3,747	11,873	-	11,873	
Total Operating Expenditures	<u>\$ 4,158,458</u>	<u>\$ 5,275,201</u>	<u>\$ 5,054,912</u>	<u>\$ 5,018,574</u>	<u>\$ 1,141,689</u>	<u>\$ 6,160,263</u>	<u>16.78%</u>
Transfers:							
Transfers Out	-	100,000	100,000	-	-	-	-100.00%
G&A Transfers Out	213,169	520,467	520,467	574,907	-	574,907	10.46%
Capital Transfers Out	-	-	-	-	-	-	-
Total Transfers (Sources) Uses	<u>213,169</u>	<u>620,467</u>	<u>620,467</u>	<u>574,907</u>	<u>-</u>	<u>574,907</u>	<u>-7.34%</u>
Other (Sources) Uses							
Public Agency	854,935	825,753	811,445	726,653	-	726,653	-12.00%
Capital Outlay - CIP	707,968	109,631	272,498	-	-	-	-100.00%
Other	273	25,000	25,000	1,000	-	1,000	-96.00%
Contingency	-	400,000	400,000	200,000	-	200,000	-50.00%
Total Other (Sources) Uses	<u>1,563,176</u>	<u>1,360,384</u>	<u>1,508,943</u>	<u>927,653</u>	<u>-</u>	<u>927,653</u>	<u>-31.81%</u>
Total Expenditures & Transfers	<u>\$ 5,934,803</u>	<u>\$ 7,256,052</u>	<u>\$ 7,184,322</u>	<u>\$ 6,521,134</u>	<u>\$ 1,141,689</u>	<u>\$ 7,662,823</u>	<u>5.61%</u>
Total Increase (Decrease)	<u>\$ 2,007,029</u>	<u>\$ 53,948</u>	<u>\$ 1,319,678</u>	<u>\$ 2,588,866</u>	<u>\$ (1,141,689)</u>	<u>\$ 1,447,177</u>	
Measurement Focus Increase (Decrease)	16,852						
Ending Assigned and Unassigned Fund Balance	<u>\$ 14,383,060</u>	<u>\$ 14,437,008</u>	<u>\$ 15,702,738</u>	<u>\$ 18,291,604</u>	<u>\$ (1,141,689)</u>	<u>\$ 17,149,915</u>	<u>18.79%</u>

*See Operational Expenditure Summary for Department Detail

CITY OF COLLEGE STATION

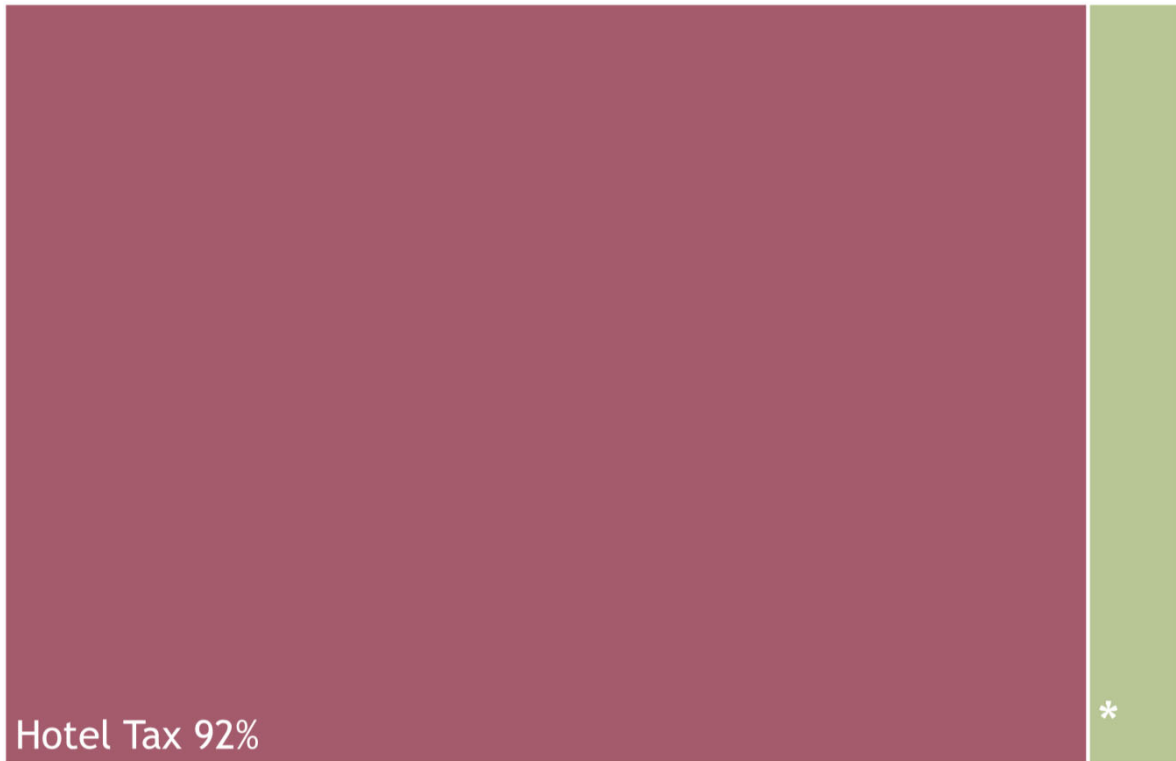
HOTEL TAX FUND FIVE YEAR FORECAST

	FY24 Year-End Estimate	FY25 Proposed Budget	FY26 Forecasted	FY27 Forecasted	FY28 Forecasted	FY29 Forecasted
Beginning Fund Balance	\$ 14,383,060	\$ 15,702,738	\$ 17,149,915	\$ 17,762,944	\$ 18,102,099	\$ 18,318,120
Total Revenues	8,504,000	9,110,000	8,675,926	8,653,032	8,786,533	8,919,471
Total Funds Available	\$ 22,887,060	\$ 24,812,738	\$ 25,825,841	\$ 26,415,976	\$ 26,888,632	\$ 27,237,591
Total Operating Expenditures	5,054,912	6,160,263	6,433,348	6,631,330	6,824,591	7,004,895
Total Transfers (Sources) Uses	620,467	574,907	626,649	683,047	744,521	811,528
Total Other (Sources) Uses	1,508,943	927,653	1,002,900	999,500	1,001,400	1,003,600
Total Expenditures & Transfers	\$ 7,184,322	\$ 7,662,823	\$ 8,062,897	\$ 8,313,877	\$ 8,570,512	\$ 8,820,023
Total Increase (Decrease)	\$ 1,319,678	\$ 1,447,177	\$ 613,030	\$ 339,155	\$ 216,020	\$ 99,448
Measurement Focus Increase (Decrease)						
Ending Assigned and Unassigned Fund Balance	\$ 15,702,738	\$ 17,149,915	\$ 17,762,944	\$ 18,102,099	\$ 18,318,120	\$ 18,417,568
Add: Unassigned Fund Balances						
Games of Texas Future Years		-	750,000	-	-	-
Unfunded CIP VPAC Projects		-	8,000,000	-	-	-
Special Events Bids	-	500,000	-	-	-	-
Unassigned Fund Balance	\$ -	\$ 500,000	\$ 8,750,000	\$ -	\$ -	\$ -
Ending Unassigned Fund Balance	\$ 15,702,738	\$ 16,649,915	\$ 7,899,915	\$ 8,852,099	\$ 9,068,120	\$ 9,167,568

* Forecast includes 1-time expenses.

Forecast developed in 2024 - future years are subject to change based on the facts and circumstances at the time of analysis.

HOTEL TAX FUND- SOURCES



*Other Revenue Totals to 8%

HOTEL TAX FUND- USES



CITY OF COLLEGE STATION

HOTEL TAX FUND

OPERATIONS EXPENDITURE SUMMARY

EXPENDITURE BY DEPARTMENT							
	FY23 Actual	FY24 Revised Budget	FY24 Year-End Estimate	FY25 Proposed Base Budget	FY25 Proposed SLAs	FY25 Proposed Budget	% Change in Budget from FY24 to FY25
Public Communications	\$ 5,428	\$ 124,579	\$ 34,072	\$ 125,613	\$ -	\$ 125,613	0.83%
Tourism	3,552,634	4,345,641	4,115,147	4,041,587	391,689	4,433,276	2.02%
Hotel Tax Collections/Audits Admin	32,577	35,000	87,286	56,000	-	56,000	60.00%
Parks & Recreation Dept	567,818	766,234	814,660	783,501	750,000	1,533,501	100.13%
Pay Plan Contingency	-	3,747	3,747	11,873	-	11,873	
TOTAL	\$ 4,158,458	\$ 5,275,201	\$ 5,054,912	\$ 5,018,574	\$ 1,141,689	\$ 6,160,263	16.78%

EXPENDITURE BY CLASSIFICATION							
	FY23 Actual	FY24 Revised Budget	FY24 Year-End Estimate	FY25 Proposed Base Budget	FY25 Proposed SLAs	FY25 Proposed Budget	% Change in Budget from FY24 to FY25
Salaries and Benefits	\$ 1,344,789	\$ 1,801,504	\$ 1,493,128	\$ 1,865,417	\$ 98,206	\$ 1,963,623	9.00%
Health Insurance	217,999	218,606	242,068	245,089	15,292	260,381	19.11%
Supplies	347,578	753,159	747,740	625,988	803,191	1,429,179	89.76%
Maintenance	22,769	5,270	23,499	5,270	-	5,270	0.00%
Purchased Services	2,225,322	2,492,915	2,544,730	2,264,937	225,000	2,489,937	-0.12%
Capital Outlay	-	-	-	-	-	-	-
Pay Plan Contingency	-	3,747	3,747	11,873	-	11,873	
TOTAL	\$ 4,158,458	\$ 5,275,201	\$ 5,054,912	\$ 5,018,574	\$ 1,141,689	\$ 6,160,263	16.78%

PERSONNEL							
	FY23 Actual	FY24 Revised Budget		FY25 Proposed Base Budget	FY25 Proposed SLAs	FY25 Proposed Budget	% Change in Budget from FY24 to FY25
Tourism	14.00	14.00		14.00	1.00	15.00	7.14%
Parks & Recreation Dept	3.30	2.50		2.50	-	2.50	0.00%
TOTAL	17.30	16.50		16.50	1.00	17.50	6.06%

April 30, 2025

Item No. 3.6.

Presentation, discussion, and possible action on current Hotel Occupancy Grants and processes.

Sponsor: Jeremiah Cook, Assistant Director - Tourism

Reviewed By CBC: N/A

Agenda Caption: Presentation, discussion, and possible action on current Hotel Occupancy Grants and processes.

Relationship to Strategic Goals:

Diverse & Growing Economy

Recommendation(s): Staff recommends the Committee receive the presentation and provide direction.

Summary: See memo

Budget & Financial Summary: N/A

Attachments:

1. HOT Grants Memo

Memorandum

To: Tourism Committee Members

From: Jeremiah Cook, Assistant Director- Tourism, City of College Station

Subject: HOT Grant Discussion

A Hotel Occupancy Tax (HOT) Grant is a grant that is meant to stimulate the economy by offering groups and event owners funding to bringing events to College Station.

1. The following parameters were put into effect in December 2020.

a. Conventions/Meetings Breakdown of Funds:

Conventions/Meetings focuses on the number of room nights associated with the event.

Number of Room Nights	Stimulus
200	\$5,000
300	\$10,000
400	\$15,000

For every additional 100 Room Nights beyond 400, the stimulus will increase by \$5,000.

b. Sports Breakdown of Funds:

Sports focuses on the number of participants and expected spectators for each event. Sports also breaks down into Regional Event and National Events. Regional Events are defined as those events that a majority of the people are from the Texas area. National Events are defined as those events that a majority of the people are from around the country. National Events typically invoke longer stays and impact the economy in other areas like vehicle rentals, flights, etc.

Sports	
Regional Events	
Number of People	Stimulus
1,000-3,000	\$10,000
3,001-5,000	\$20,000
5,001-7,500	\$30,000
7,501-10,000	\$40,000
10,001+	Discretion of the Needs for the Event

National Events	
Number of People	Stimulus
500-2,500	\$20,000
2,501-5,000	\$30,000
5,001-7,500	\$40,000
7,501-10,000	\$50,000
10,001+	Discretion of the Needs for the Event

Other Criteria (Conventions & Sports):

- Groups that opt for a multiple year contract will be eligible for an increase of \$5,000 in the second year of the stimulus contingent upon the performance of the first year of the event.
- To be eligible for the stimulus, groups must show a history participant/spectator numbers/room nights from previous events held.
- All contracts must be for the total number of room nights listed in the stimulus.
- Need dates will be considered for funding.
- All stimulus amounts are “up to” amounts.
- Media coverage and ancillary needs (vehicle rental, flights, etc.) will be considered in determining eligibility.
- Cannot include dates over Texas A&M Home Football Games, Texas A&M Graduations, or Texas A&M Family Weekend.

2. Current Process:

- Sales teams work with groups to bring events to College Station.
- Group applies for grant within the Foundant Grant Interface providing all pertinent event information including dates, anticipated room nights and anticipated attendees.
- Sales team, in consultation with the Assistant Director- Tourism, formulate recommendations to the Tourism Committee based on group needs and current parameters.
- Full application and staff evaluation is sent to the Tourism Committee.
- Tourism Committee makes final recommendation on Grant Funding to the City Manager.
- Following the completion of the convention or sports event, group will complete the post-event analysis in the Foundant Grant Interface.
- Stimulus will be sent.

	Budget	Utilized	% Utilized
FY23	\$ 616,710.00	\$ 816,579.00	132%
FY24	\$ 774,010.00	\$ 544,530.00	70%
FY25	\$ 754,010.00	\$ 526,830.00	70%