

SPORTS FACILITY MARKET AND ECONOMIC ANALYSIS

As part of the park, recreation, and open space planning initiative, and because of existing needs for supporting youth and adult baseball, softball and soccer, consideration is being given to the costs and benefits of a new sports complex that would provide high quality new outdoor fields for baseball, softball and/or soccer. This section is focused on bringing economic information, reasoning, and analysis to the conversation about the prospective new sports complex.

Improving youth sports facilities can have an impact on the local economy. According to New York University's Tisch Center for Hospitality, Tourism and Sport, youth sports tourism is the fastest-growing segment in travel. Players and their families drive to other cities for game and tournament events, and while they are there, they may purchase food, gas, memorabilia, and other goods and services.

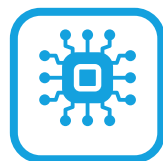
Investing in local sports facilities can bring an economic return. But a positive economic return is not a given. The number of spectators that come to a game or tournament, the length of time they stay, and the likelihood that they stay overnight is dependent on what other attractions the city offers, the quality of the options for sideline food or going out after the game, the hotel facilities that are available, and how far players and visitors have traveled to come to the event.

Economic analysis can illuminate important considerations relative to the sports complex, such as the following:

- **Competitive context.** Where are the other high-quality sports complexes near Bastrop?
- **Facility demand.** Is there a demand for additional sports facility capacity in the region?
- **Revenues.** What are the revenues that high quality sports complexes receive?
- **Economic impact.** What local economic benefit would be experienced as a result of hosting sports events at a prospective sports complex?

Different sports reside in different organizational, physical, and economic landscapes. Ball sports have an entirely different competitive context than soccer does because ballfield facilities and soccer facilities in surrounding communities are in different locations and have different levels of quality. Likewise, the organizational context, the demand environment, the revenue potential, and the economic impact is different for soccer than for ball sports. There are also important distinctions within ball sports. While youth baseball, youth fastpitch softball, and adult slow-pitch softball can to some degree share fields, there are also important distinctions in their organizational and economic contexts.

Four primary modes of research and analysis were utilized for this study:



Locational and competitive context analysis



Demographic review

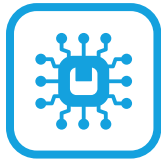


Research interviews



Economic impact analysis

(For a more detailed summary of study findings, please refer to Appendix B.)



LOCATIONAL AND COMPETITIVE CONTEXT ANALYSIS

For ball sports and soccer, nearby sports facilities were identified, researched, rated for quality, and mapped to understand the competitive context of a new sports facility in Bastrop. In addition to sports that would drive the potential demand for a field-based sports facility, the competitive conditions for pickleball and par-3 golf were also analyzed for comparison purposes as possible alternative investments of park resources. A summary of key competitive findings for each sport follows:



Baseball & Softball

The study identified and evaluated 13 baseball/softball facilities based on their location, number of fields, or quality of amenities. 5 facilities were ultimately deemed competitive as tournament-quality given their number and quality of fields and amenities. None of these 5 facilities are within 25 miles of Bastrop. The 5 standout facilities in terms of their ability to host tournaments are the Northeast Metropolitan Sports Complex in Pflugerville, Old Settlers Park in Round Rock, and Hohlt Park in Brenham. Old Settlers Park, with more than 25 ballfields, has hosted national and international tournaments.



Soccer

The study identified and evaluated 13 soccer facilities based on their location, number of fields, or quality of amenities. 6 facilities were ultimately deemed competitive as tournament-quality given their number and quality of fields and amenities. None of these 6 facilities are within 25 miles of Bastrop. The three standout facilities in terms of their ability to host tournaments are the Northeast Metropolitan Sports Complex in Pflugerville, Round Rock Multipurpose Complex, and Bee Creek Sports Complex in Spicewood.



Pickleball

The study identified and evaluated 33 facilities with a total of 105 pickleball courts within 35 miles of Bastrop. Only 2 facilities with a 10 combined courts are within 25 miles of Bastrop. Only five facilities (15%) have been constructed for pickleball usage. The vast majority (85%) have been adapted from other uses (e.g., tennis, basketball, etc.) and lack features like permanent nets and pickleball striping.

10 courts

within 25 miles of Bastrop

95 courts

between 25 to 35 miles from Bastrop - almost all within the Austin metro area



Par-3 Golf

The study identified and evaluated 8 par-3 golf courses within 150 miles of Bastrop. Only 1 course, Butler Pitch and Putt in Austin, is within 50 miles of Bastrop. However, this course would not meet the definition of a typical par-3 course as most holes are less than 50 yards in distance.

8 courses

open to the public within 150 miles of Bastrop

1 course

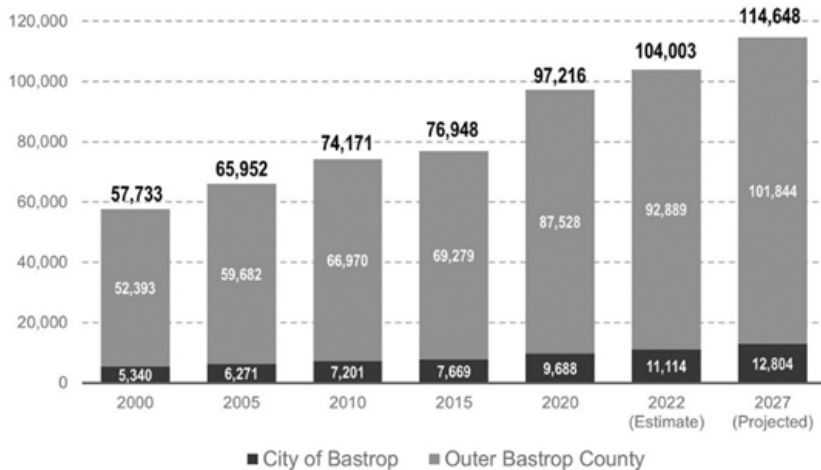
within 50 miles



DEMOGRAPHIC REVIEW

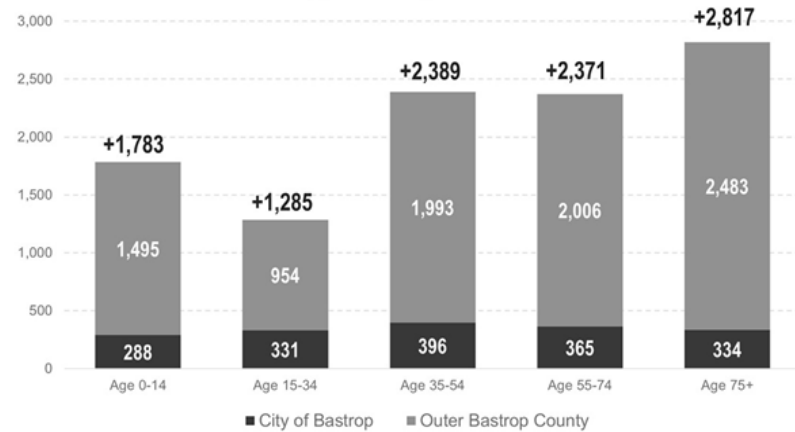
In order to better understand how future growth in the Bastrop area will impact the demand for a new sports facility, a review of demographic trends was conducted that focused on overall population growth, the age and racial/ethnic profile of the population, and income levels. The following are key findings from the analysis.

- Bastrop County is one of the fastest growing areas in Texas. Since 2015, the County has added 27,000 people, a growth rate of 35%. Over the next five years, the county is projected to grow by another 10,500 people.
- All age groups are forecasted to grow significantly in Bastrop County over the next five years. This will fuel demand for both organized youth sports as well as adult-oriented sports



Source: ESRI, US Census Bureau

POPULATION GROWTH TRENDS OF BASTROP AND BASTROP COUNTY



Source: ESRI, US Census Bureau

FORECASTED POPULATION GROWTH BY AGE GROUP



RESEARCH INTERVIEWS

Structured conversations with facility managers and organizational representatives yielded a wealth of information relative to facility demand, pricing, staffing, desirable features, and other things. Below are key findings from the interviews.

Local Youth Sports Organizations

1. All youth sports programs have been growing rapidly in recent years, which has generated a lot of demand for existing field facilities in Bastrop, especially soccer fields.

2. The number of fields and their quality is not adequate in Bastrop. This is beginning to impact the ability of youth programs to meet the growing needs of the community. Particular concerns were field conditions and lack of field amenities (e.g., adequate/safe parking, lighting, family areas, covered spectator seating, etc.)
3. All of those interviewed stated a desire to host larger events and tournaments, but that the inadequacy of the existing field facilities is the biggest barrier.
4. All of those interviewed felt that any additional investment in new or upgraded sports facilities would be money well spent regardless of its size or ability to host tournaments.

Regional Sports Facility Managers

1. Demand for field facilities is very strong, especially soccer fields and fields with artificial turf. Wait lists are lengthening and reservations are being made further in advance.
2. The minimum number of fields needed to host most events/tournaments is four for either soccer or baseball/softball.
3. It is very difficult to make money from tournament fees, unless your facility is very large (15+ fields).
4. Artificial turf or synthetic fields are becoming the norm due to higher demand (despite higher rental fees), much lower maintenance cost over the long term, and expanded availability.



ECONOMIC IMPACT ANALYSIS

With the use of an economic impact model for Bastrop County, and utilizing a set of initial assumptions, the economic impact of tournament events on Bastrop's economy was estimated for both a new baseball/softball complex and a new soccer complex. Assumptions were broken into two types. One set were related to tournament characteristics, such as number of fields, tournament days, teams per tournament, players per team, guest per player, and percent attendees from out of town. The other set were related to average spending for hotel stays, meals, retail goods, and transportation.

Given the specified assumptions, a new four-field complex in Bastrop would generate or support the following estimated impacts on an annual basis:

	Baseball/Softball Complex	Soccer Complex
Out of Town Visitors	87,552	98,496
New Visitor Spending	\$5.1 million	\$5.6 million
Additional Local Full-Time Equivalent Jobs	81	85
Additional Local Tax Receipts	\$218,263	\$226,668

Note that this analysis is focused on impacts from hosting tournament events. There are additional positive economic impacts from other uses of a sports complex. A new complex will capture a greater share of the games and practices that would otherwise go elsewhere. Although not as significant as the spending at tournaments (where visitors may spend all or most of a day in Bastrop), the local spending that occurs before and after regular games and practices has an additional positive impact on Bastrop's economy.