

SEPTEMBER 25, 2025

# CITY OF COLLEGE STATION ECONOMIC DEVELOPMENT MASTER PLAN

## CITY COUNCIL BRIEFING

- ▶ TRACYE MCDANIEL, PRESIDENT
- ▶ JENN TODD-GOYNES, SENIOR CONSULTANT
- ▶ ERICA COLSTON, CONSULTANT



Photo Credit: City of College Station

# AGENDA

- ▶ Project Overview
- ▶ What We've Learned
- ▶ Draft Framework
- ▶ Next Steps



# PROJECT OVERVIEW

# PROJECT GOAL

To prepare a ~~five-year~~ economic development master plan that provides a roadmap for **sustainable economic growth and development** tailored to the needs and opportunities of College Station.



# SPECIFIC CONSIDERATIONS AND ANTICIPATED OUTCOMES

## Key Sectors and Innovation-Driven Industries

- ▶ Analyze **target industry sectors** and **alignment with the current workforce**
- ▶ Examine opportunities for **future growth**
- ▶ Encourage **resilient, sustainable** economic growth

## Real Estate and Development Opportunities

- ▶ Prepare an analysis of **real estate fundamentals** for major commercial or investible properties
- ▶ Identify **development and redevelopment** opportunities
- ▶ Examine **emerging infrastructure needs and gaps** with an emphasis on supporting economic growth and entrepreneurship
- ▶ Examine the extent to which **development and redevelopment opportunities align with industry investment trends and workforce capacity**

## Entrepreneurial Ecosystem

- ▶ Strengthen **innovation and entrepreneurial ecosystems**
- ▶ Improve **technology transfer and commercialization**

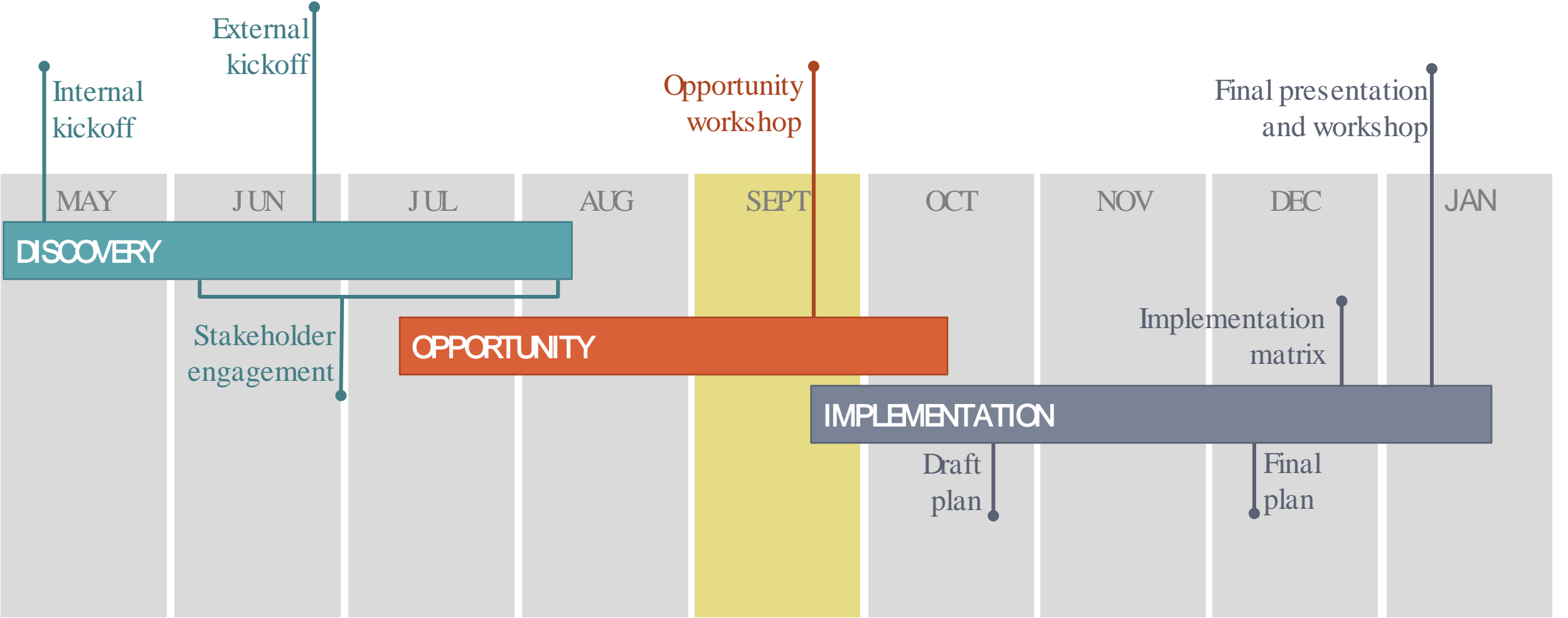
## Talent and Workforce

- ▶ **Align the talent pipeline** with the needs of current and future employers, key sectors, and the entrepreneurial ecosystem

## Resource Alignment

- ▶ Evaluate potential **public-private partnerships**
- ▶ Suggest **organizational frameworks** for accomplishing the plan's objectives
- ▶ Create a **plan for implementation** that identifies roles and responsibilities, timelines, resource impacts, and performance metrics

# PROJECT SCHEDULE



# BENCHMARK COMMUNITIES

## National Peers

- Ann Arbor, MI
- Athens, GA
- Auburn, AL
- Blacksburg, VA
- Champaign, IL
- Charlottesville, VA
- Columbia, SC
- Fayetteville, AR
- Gainesville, FL
- Lubbock, TX
- Tuscaloosa, AL
- San Marcos, TX
- State College, PA
- Waco, TX

*(Alignment with current Tourism Strategic Plan)*

## Texas Triangle Peers

- Austin
- Bryan
- Conroe
- Dallas
- Fort Worth
- Georgetown
- Killeen
- New Braunfels
- San Antonio
- San Marcos
- Temple
- Waco

# WHAT WE'VE LEARNED



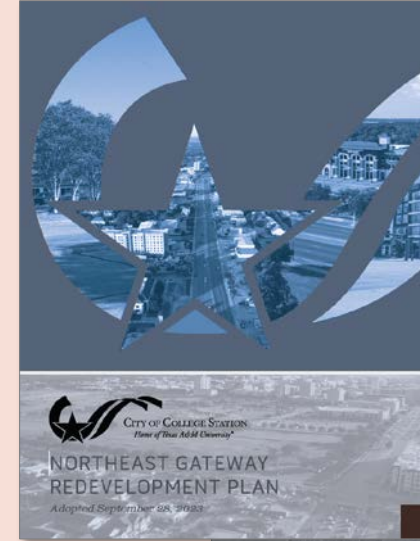
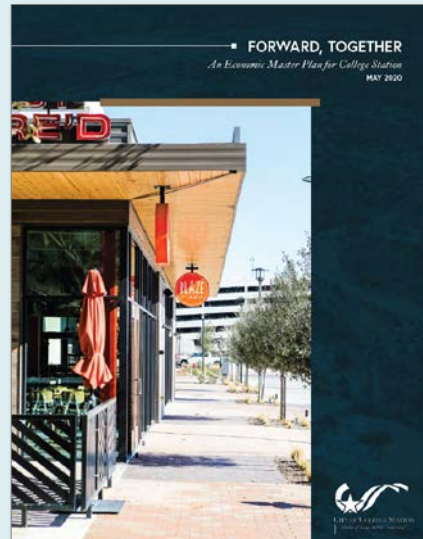
# WHAT WE'VE LEARNED FROM PRIOR WORK

## *Summary of background documents reviewed*



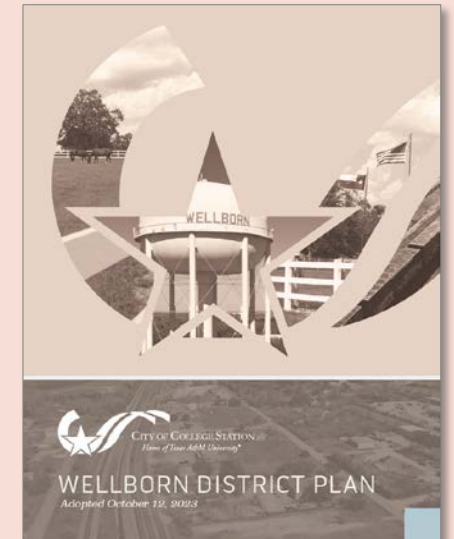
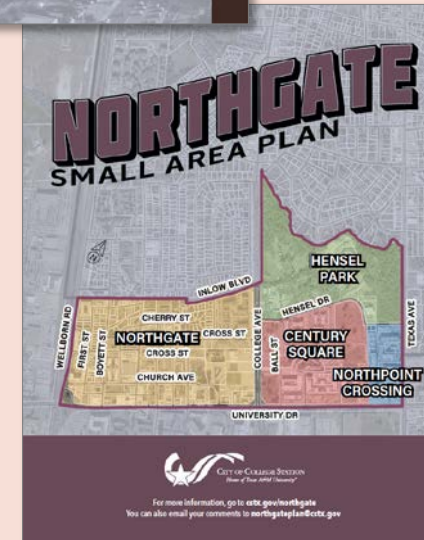
### Citywide Plans

- ▶ City of College Station Comprehensive Plan
- ▶ City of College Station Existing Conditions Report
- ▶ Forward, Together Economic Master Plan
- ▶ Housing Action Plan



### Small Area Plans

- ▶ Northgate Small Area Plan
- ▶ Northeast Gateway Redevelopment Plan
- ▶ Wellborn District Plan



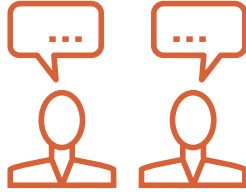
# WHAT WE'VE LEARNED FROM YOU

*Illustration of stakeholder engagement to date*



**7**  
ROUNDTABLES

Business Retention and Expansion • City Staff • Economic Sustainability • Education and Workforce • Entrepreneurship and Innovation • Infrastructure and Real Estate Development



**10**  
INTERVIEWS

In-depth conversations with leaders in local government, higher education, entrepreneurship, and business



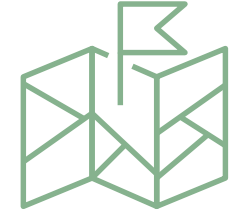
**3**  
LEADERSHIP  
ENGAGEMENTS

Council and Committee Updates • Steering Committee Meetings



**1**  
PUBLIC INPUT  
SESSION

Business Over Breakfast



**2**  
SITE VISITS

In-person consultant trips, including site visits to potential and emerging development sites, commercial areas, and quality-of-place amenities.

# WHAT DOES ECONOMIC DEVELOPMENT MEAN TO YOU?

*Business Over Breakfast live polling results*



# WHAT WE'VE LEARNED FROM YOU

*Themes and priorities from stakeholder engagement*



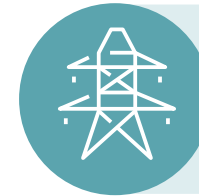
**Placemaking and Real Estate**  
*Creating experiential destinations*



**Entrepreneurial Support**  
*Providing mentorship, capital, and real estate*



**Housing**  
*Ensuring options at affordable price points*



**Infrastructure**  
*Expanding with population growth*



**Workforce Development**  
*Upskilling, recruitment, & retention*



**Community Character and Identity**  
*Discovering how we want to grow and change*



**Business Recruitment and Retention**  
*Aligning industry with competitive position*



**Coordination and Collaboration**  
*Breaking through institutional silos*



# WHAT WE'VE LEARNED FROM THE DATA

## *Quantitative analysis components*



### CITYWIDE BASELINE & PEER ANALYSIS

#### DEMOGRAPHICS

Population Trend	Population Change
City Share of MSA Population	
Population Drivers	Population Pyramid
Texas Triangle Peer Map	
Socioeconomic Peers	Socioeconomic Map

#### EMPLOYMENT & INDUSTRIES

Employment Trend	Employment Recovery
City Share of MSA Employment	
Employment Annual Change	
Major Industries	
Industry Employment Share of MSA	
Net Employment Change by Industry	
Industry Trends	Industry Specialization

#### COMMERCIAL PROPERTY DYNAMICS

Texas Triangle Peer MSA Comparisons
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### INNOVATION INFRASTRUCTURE

#### PRIORITY SECTOR ALIGNMENT

Job Posting Demand	Job Qualifications	Skills Needed	Job Posting Trends
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#### WORKFORCE ALIGNMENT | Postsecondary

Awarding Institutions Map	General Program Distribution	General Program Trends
Detailed Program Distribution	Detailed Program Trends	

#### WORKFORCE ALIGNMENT | Alternative career paths

CTE Learners Map	Apprenticeship Trends	Apprentice Organizations
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#### CAPITAL INVESTMENT | Private

Investment Value	Investment Distribution	Investment Timeline
Out of State Investors	Investment Destination	Investment Origins
Venture Equity Timeline	Venture Equity Destinations	Venture Equity Stages
Venture Equity Origins	Venture Equity Investors	

#### CAPITAL INVESTMENT | Public

SBIR / STTR Locations	SBIR / STTR Timeline	SBIR / STTR Recipients
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#### CAPITAL INVESTMENT | Academic

R&D Expenditures	R&D by Field of Study
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### COMMERCIAL REAL ESTATE & DEVELOPMENT OPPORTUNITIES

#### FISCAL TRENDS

Revenue & Debt
Property Taxes
Sales Taxes

#### COMMERCIAL PROPERTY & LAND USE

Commercial Real Estate Comparisons
Commercial Real Estate Share of MSA
Commercial Real Estate Maps
Infrastructure & Developable Land Maps
Priority Districts & Density

# WHAT WE'VE LEARNED FROM THE DATA

*Key findings from the quantitative analysis*



## **Diversifying Revenue Sources**

*Residential drives growing property tax base*



## **Educational Attainment**

*Educated population, increasing post-secondary completion rates*



## **Resident Mobility**

*A highly transient student population*



## **Housing Cost Burden**

*Low affordability for owners and renters*



## **Innovation and Tech Transfer**

*Outsized share of federal seed funding*



## **Private Sector Expansion**

*Regional industry growth beyond education*



## **Distinct Workforce Demand**

*Industries and qualifications requirements different from regional benchmarks*



## **Corridor and Node Investment**

*Retail infill and densification opportunities*

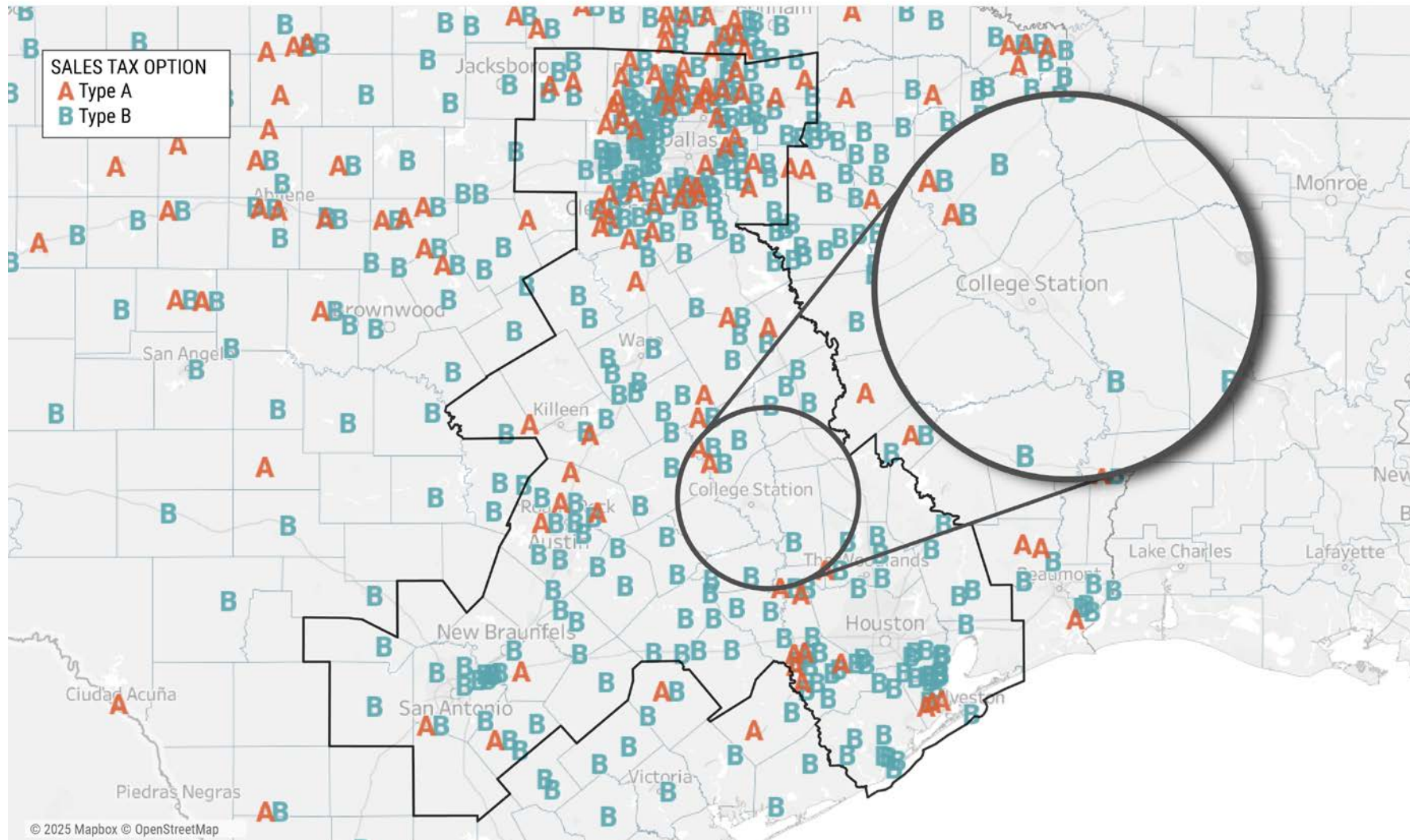


# LOCAL SALES TAX OPTIONS



Diversifying Revenue Sources

*TYPE A and TYPE B options around the Texas Triangle region*



*With voter approval, eligible Texas cities can impose local sales and use tax to finance economic development via one or both types of options: Types A and/or B.*

*Type A is limited to uses supporting primary job creation, like manufacturing, industrial development and R&D, whereas Type B has a broader range of use, including quality of life improvements which support business attraction and retention.*

Sources: Texas Comptroller of Public Accounts; TIP Strategies, Inc.

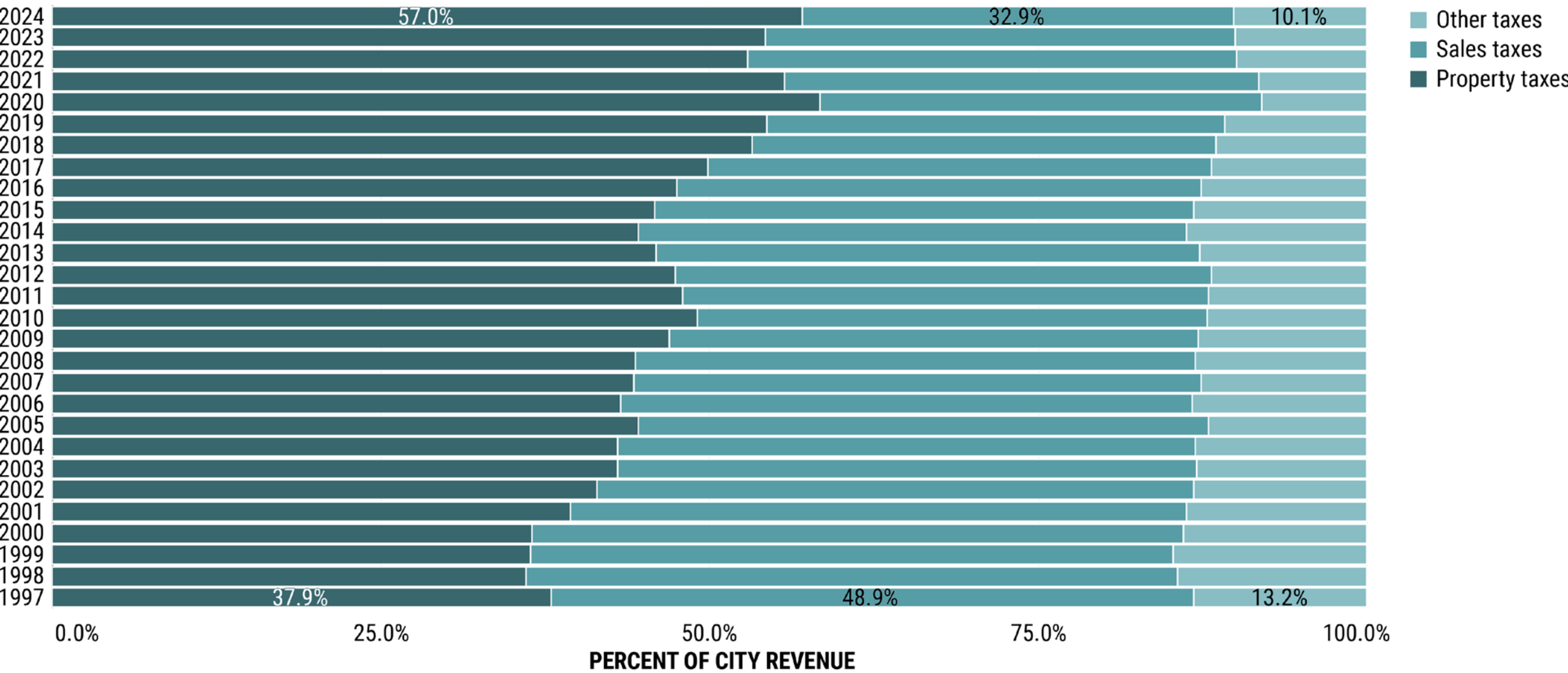
Notes: Type A/B electives are as of August 2023. The "Texas Triangle" region includes the Dallas-Fort Worth-Arlington MSA, the Houston-Pasadena-The Woodlands MSA, the Austin-Round Rock-San Marcos MSA, and the San Antonio-New Braunfels MSA, along with other MSAs and non-MSA counties located along or within the interstate corridors (I-10, I-35, and I-45) that connect them.

# MUNICIPAL REVENUE SOURCES



Diversifying Revenue Sources

*Annual distribution of City of College Station revenues as a share of total, 1997–2024*



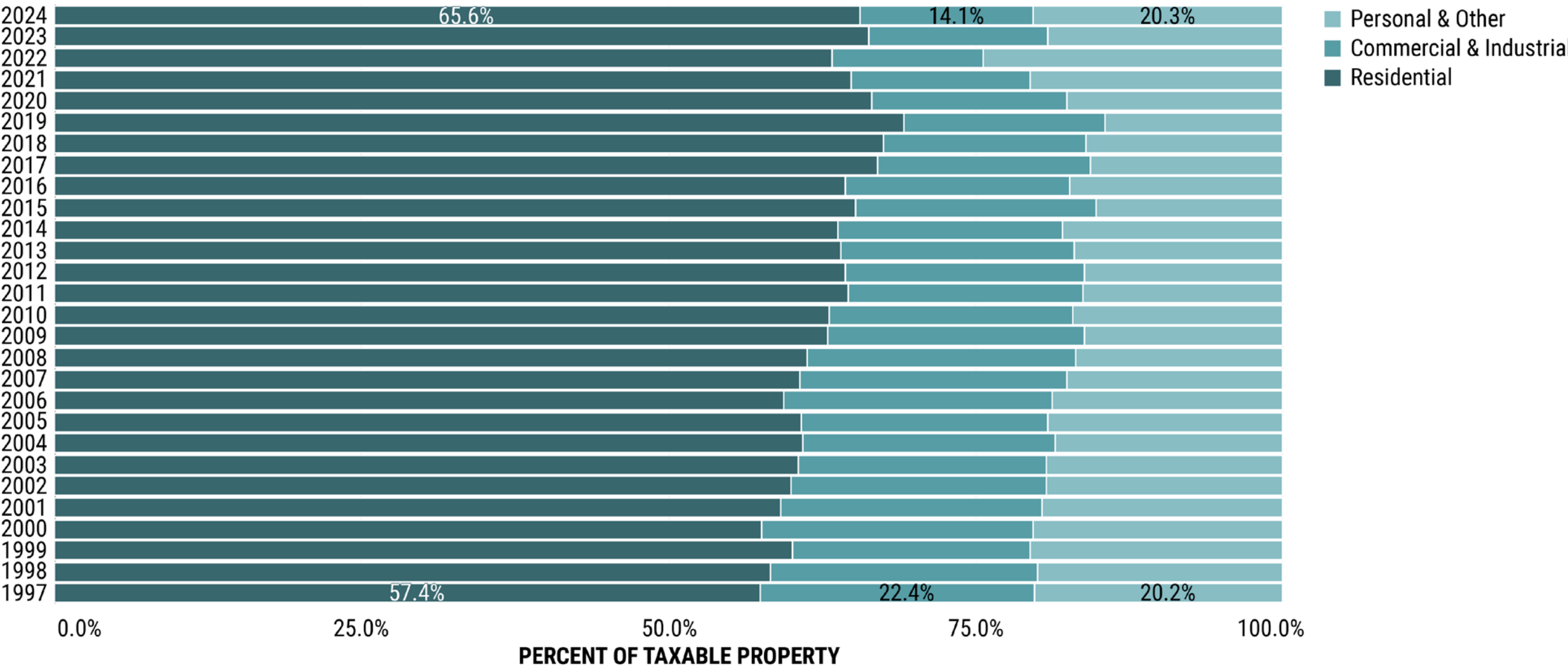
Sources: City of College Station, *Comprehensive Annual Financial Report* (various years); TIP Strategies, Inc.  
Notes: The City of College Station's fiscal year ends on September 30 annually.

# MUNICIPAL PROPERTY TAX BASE



Diversifying Revenue Sources

*Annual distribution of taxable property in the City of College Station, 1997–2024*



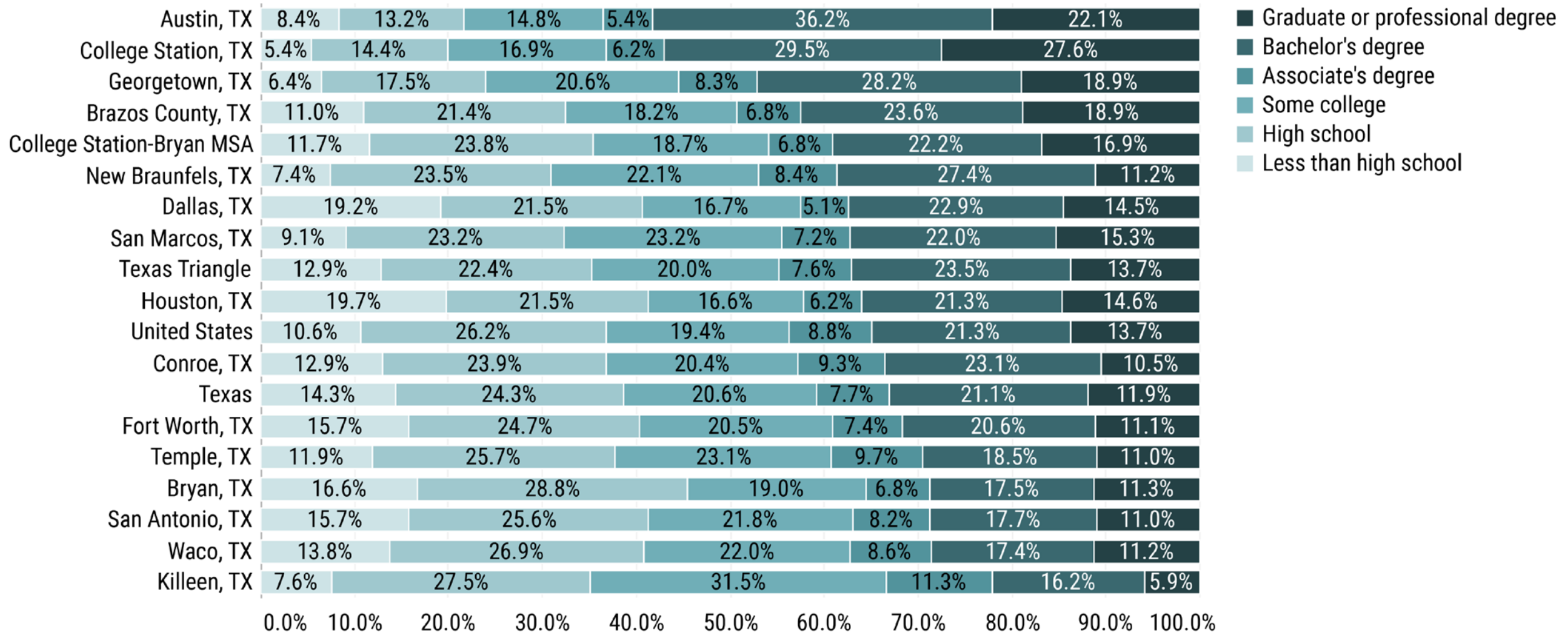
Sources: City of College Station, *Comprehensive Annual Financial Report* (various years); TIP Strategies, Inc.  
Notes: The City of College Station's fiscal year ends on September 30 annually.

# EDUCATIONAL ATTAINMENT, 2023



Educational Attainment

*Resident population 25 years and over*



Sources: 2023 American Community Survey (ACS) 5-year sample, TIP Strategies, Inc.

Notes: Educational attainment only measured for population 25 and older. High school includes equivalency. Some college indicates no degree was received. Graduate degree includes professional degrees and doctoral programs.

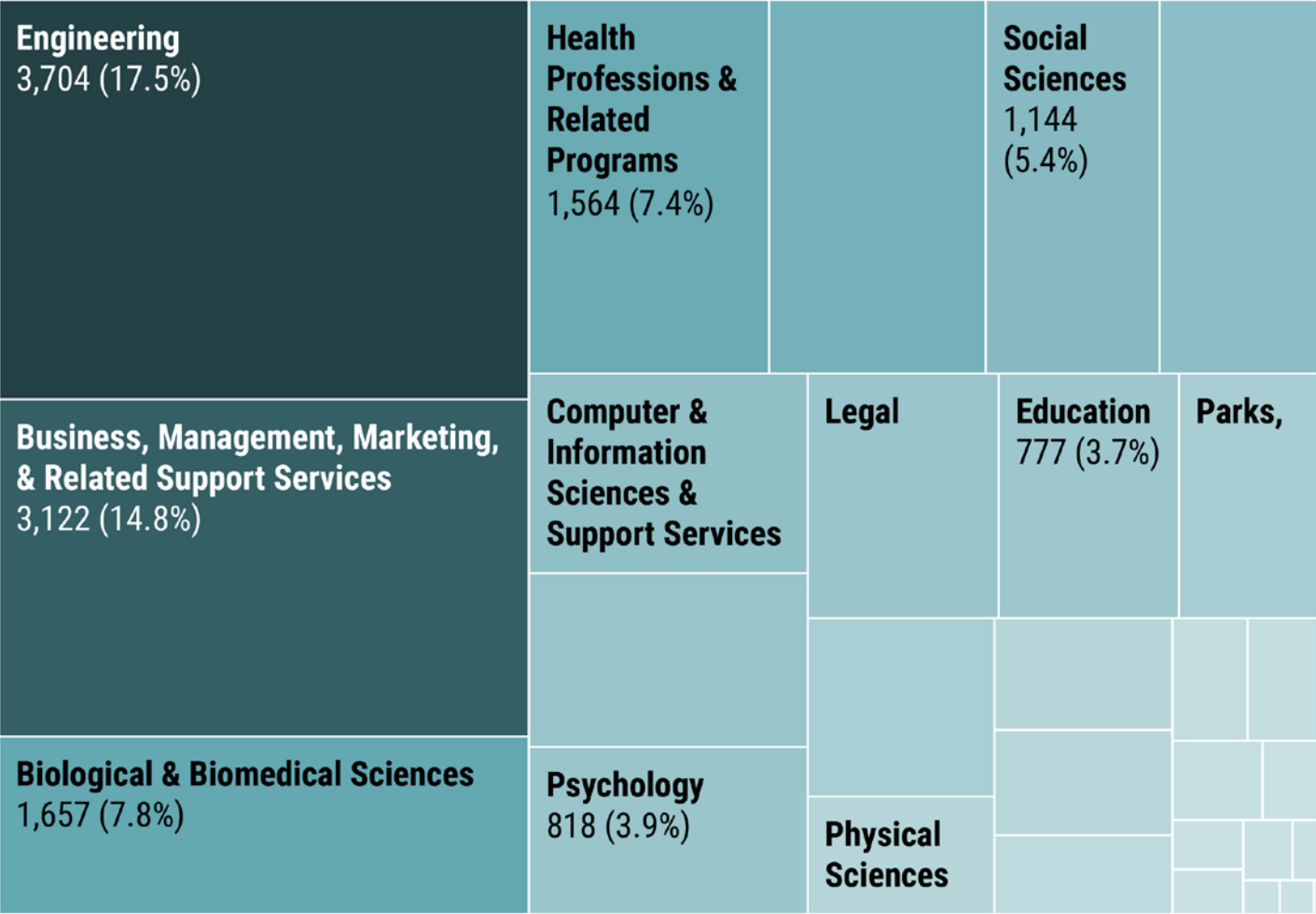


# GENERAL PROGRAM COMPLETIONS

Completions in College Station-Bryan MSA institutions, 2023



Educational Attainment



## COMPLETIONS BY LEVEL

Awards of less than 2 years	4.8%
Bachelor's Degrees	64.2%
Graduate Degrees	31.1%

## COMPLETIONS BY LARGEST DETAILED PROGRAMS

Biomedical Sciences, General	3.3%
Mechanical Engineering	3.0%
Multi-/Interdisciplinary Studies, Other	3.0%
Computer Science	2.8%
Psychology, General	2.7%

## COMPLETIONS BY LARGEST INSTITUTIONS

Texas A&M University-College Station	99.6%
Charles and Sues School of Hair Design	0.3%
Manuel and Theresa's School of Hair Design-Bryan	0.0%

Sources: National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Bureau of Labor Statistics (BLS); US Department of Homeland Security (DHS), Student and Exchange Visitor Program; TIP Strategies, Inc.

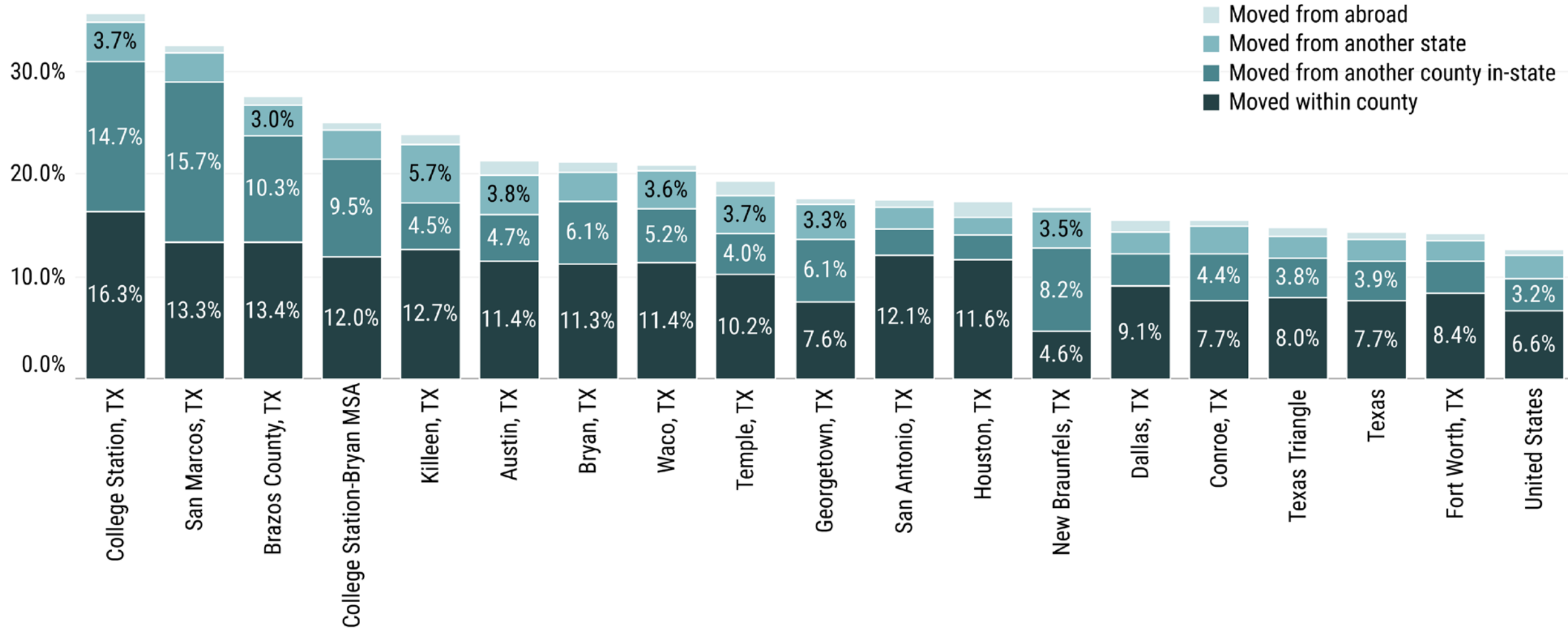
Notes: Includes only general programs with at least 25 average annual completions between 2013 and 2023. Associate's Degrees include certificates earned in more than two years and less than four years. Graduate Degrees includes professional certificates, master's degrees, and doctoral degrees. A single program may lead to multiple occupational pathways, and a single occupation is often related to multiple programs. Jobs and earnings data represents the Texas Triangle in 2024. Science, Technology, Engineering, and Mathematics (STEM) designations are determined by the DHS for programs and by the BLS for occupations. The "Texas Triangle" region includes the Dallas-Fort Worth-Arlington MSA, the Houston-Pasadena-The Woodlands MSA, the Austin-Round Rock-San Marcos MSA, and the San Antonio-New Braunfels MSA, along with other MSAs and non-MSA counties located along or within the interstate corridors (I-10, I-35, and I-45) that connect them.

# POPULATION THAT MOVED LAST YEAR, 2023

*Resident population 1 year and over*



Resident Mobility



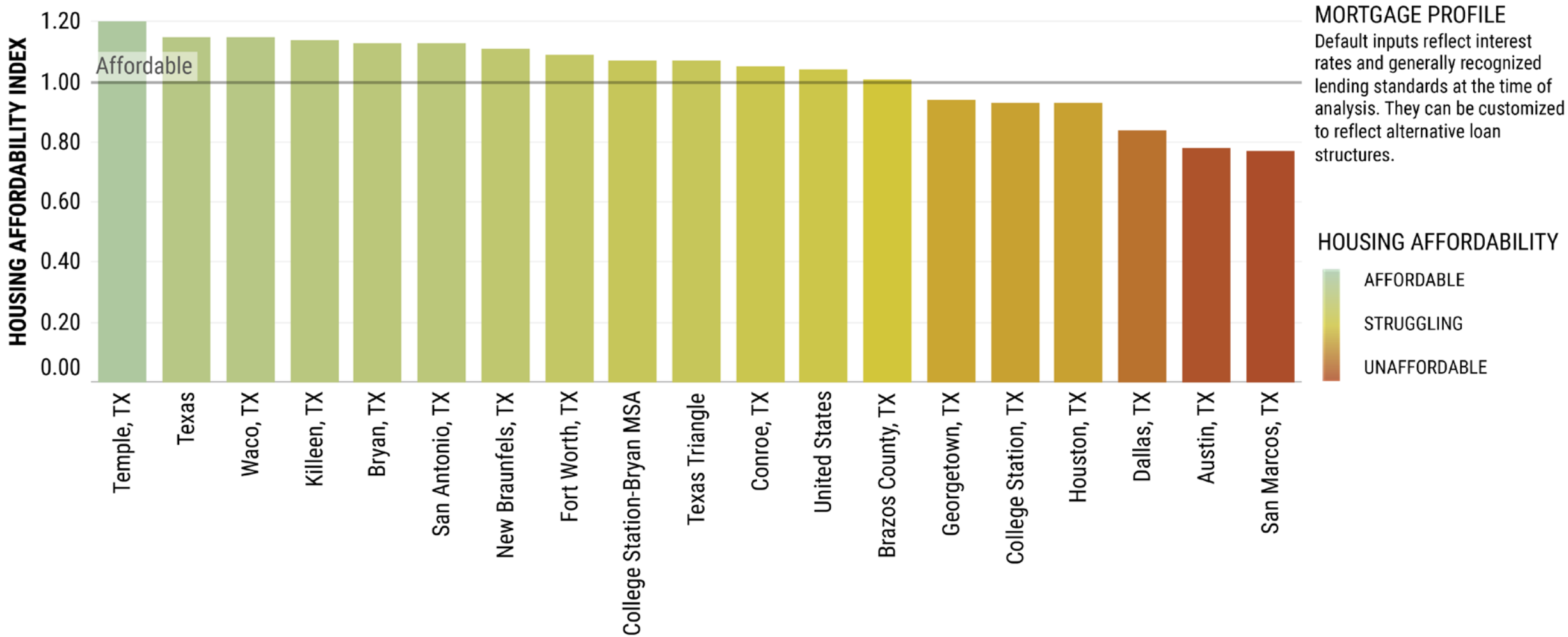


# HOUSING AFFORDABILITY INDEX, 2023



Housing Cost Burden

*Median mortgage of owner-occupied housing units vs. median family income*

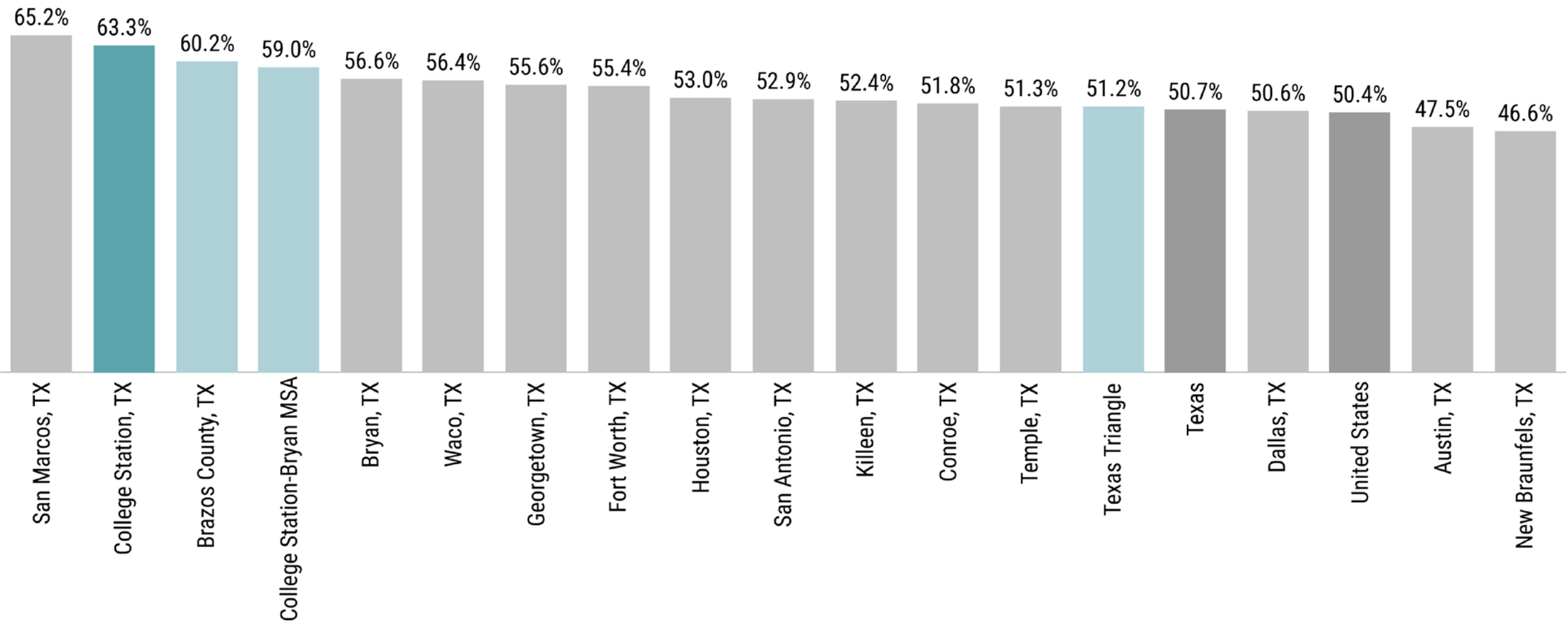


Sources: 2023 American Community Survey (ACS) 5-year sample, TIP Strategies, Inc.

Notes: The Housing Affordability Index was adapted from Texas A&M University's Real Estate Center by TIP Strategies, Inc. The index compares median income to a typical mortgage payment on a median-priced home. A value of 1 indicates the median income is exactly enough to purchase a median home. Values <1 (redder bars) indicate unaffordability, and values >1 (greener bars) indicate affordability. Estimated mortgage payments only include the monthly payments on the loan; they do not include insurance or tax payments. Down payment is the percentage of the home value paid before the mortgage. Mortgage interest rate is the APR. Mortgage term is the length of the loan in years. Qualifying ratio (debt: income) is the maximum debt-to-income ratio that still qualifies for a mortgage.

# HOUSING COST-BURDENED RENTERS, 2023

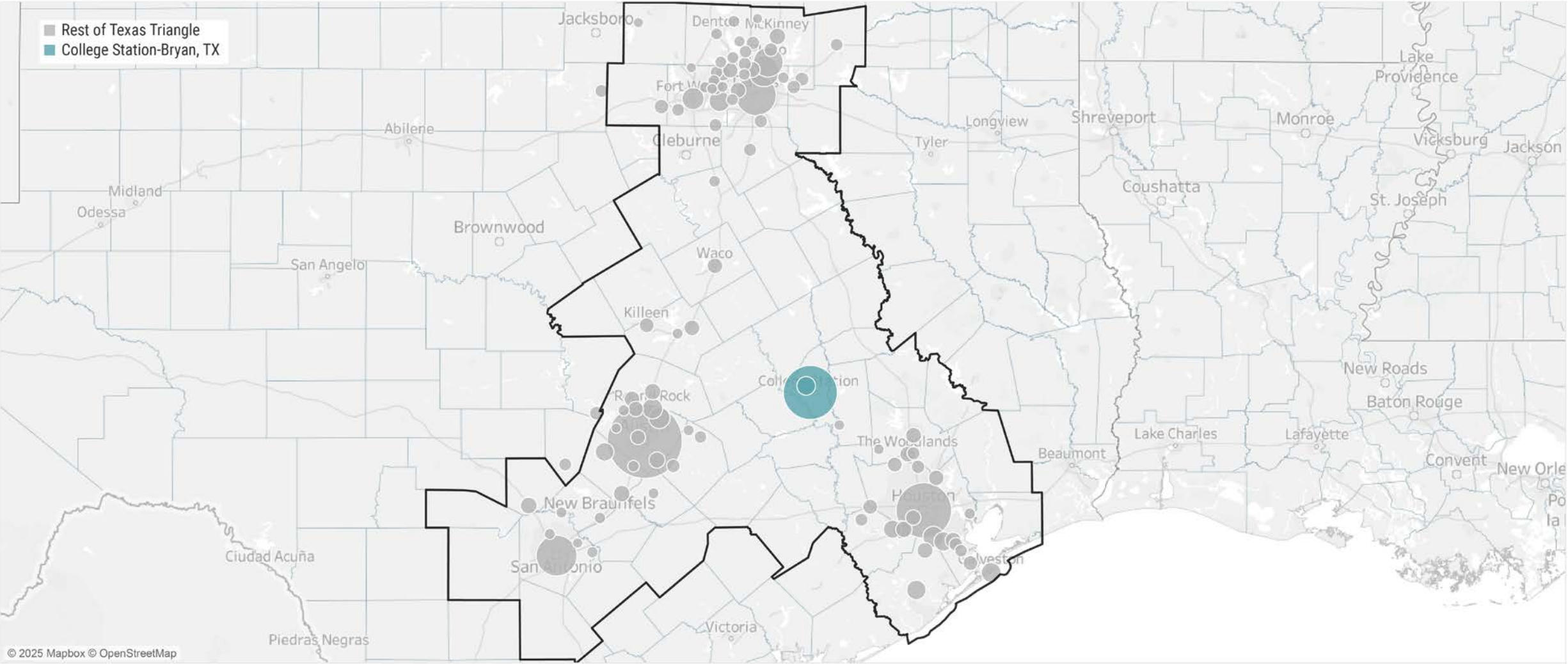
*Renter-occupied housing units*



Sources: 2023 American Community Survey (ACS) 5-year sample, TIP Strategies, Inc.  
Notes: Housing-cost burdened households are those spending 30 percent or more of income on housing costs. Only includes households where housing costs and household income can both be determined.



## SBIR and STTR awards in the Texas Triangle by city and region, 2010–2024

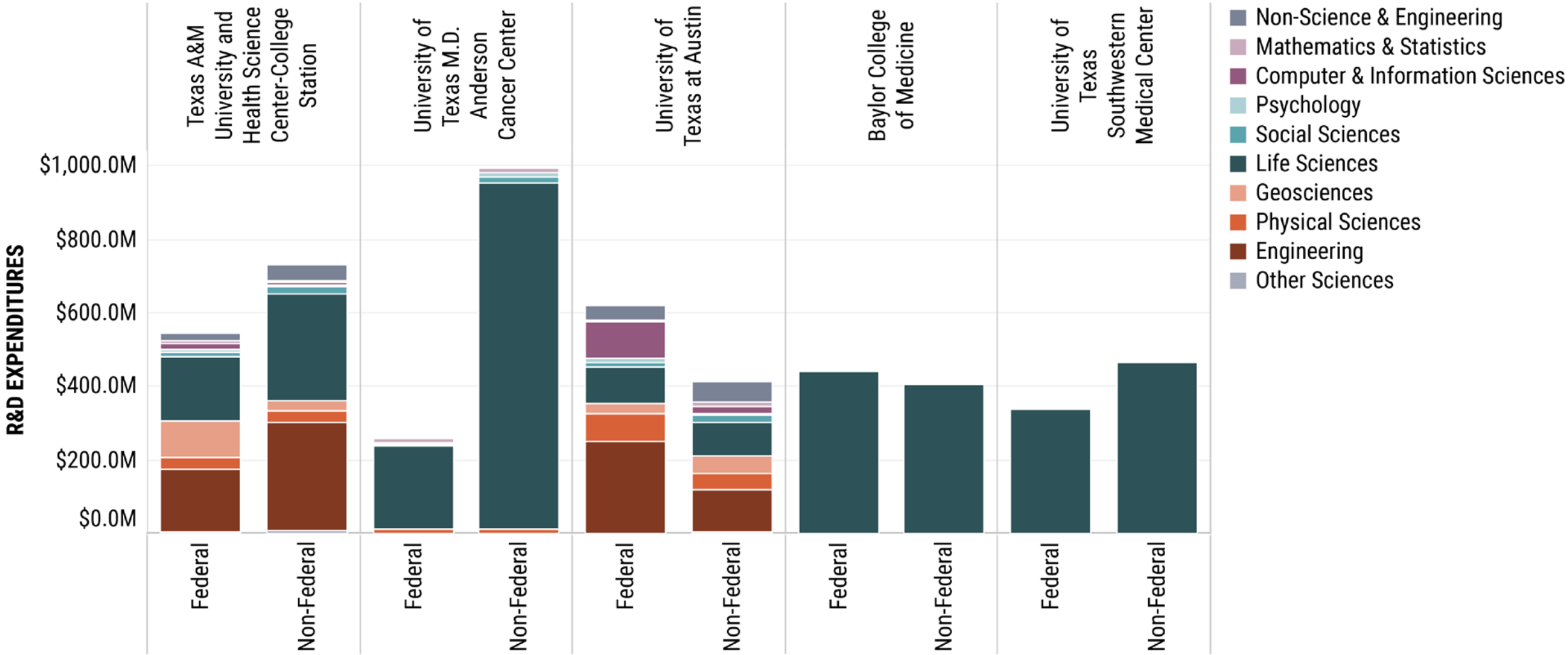


Sources: US Small Business Administration; TIP Strategies, Inc.

Notes: The College Station-Bryan MSA includes Brazos County, Burleson County, and Robertson County counties in Texas. The Small Business Innovation Research (SBIR) and the Small Business Technology Transfer (STTR) programs encourage domestic small businesses to engage in research and development activities with potential for commercialization. The "Texas Triangle" region includes the Dallas-Fort Worth-Arlington MSA, the Houston-Pasadena-The Woodlands MSA, the Austin-Round Rock-San Marcos MSA, and the San Antonio-New Braunfels MSA, along with other MSAs and non-MSA counties located along or within the interstate corridors (I-10, I-35, and I-45) that connect them.

# UNIVERSITY R&D BY FIELD OF STUDY

Major research and development universities in the Texas Triangle Region, 2023



Sources: National Science Foundation (NSF), National Center for Science and Engineering Statics (NCSES), Higher Education Research and Development Survey (HERD) 2023; TIP Strategies, Inc.

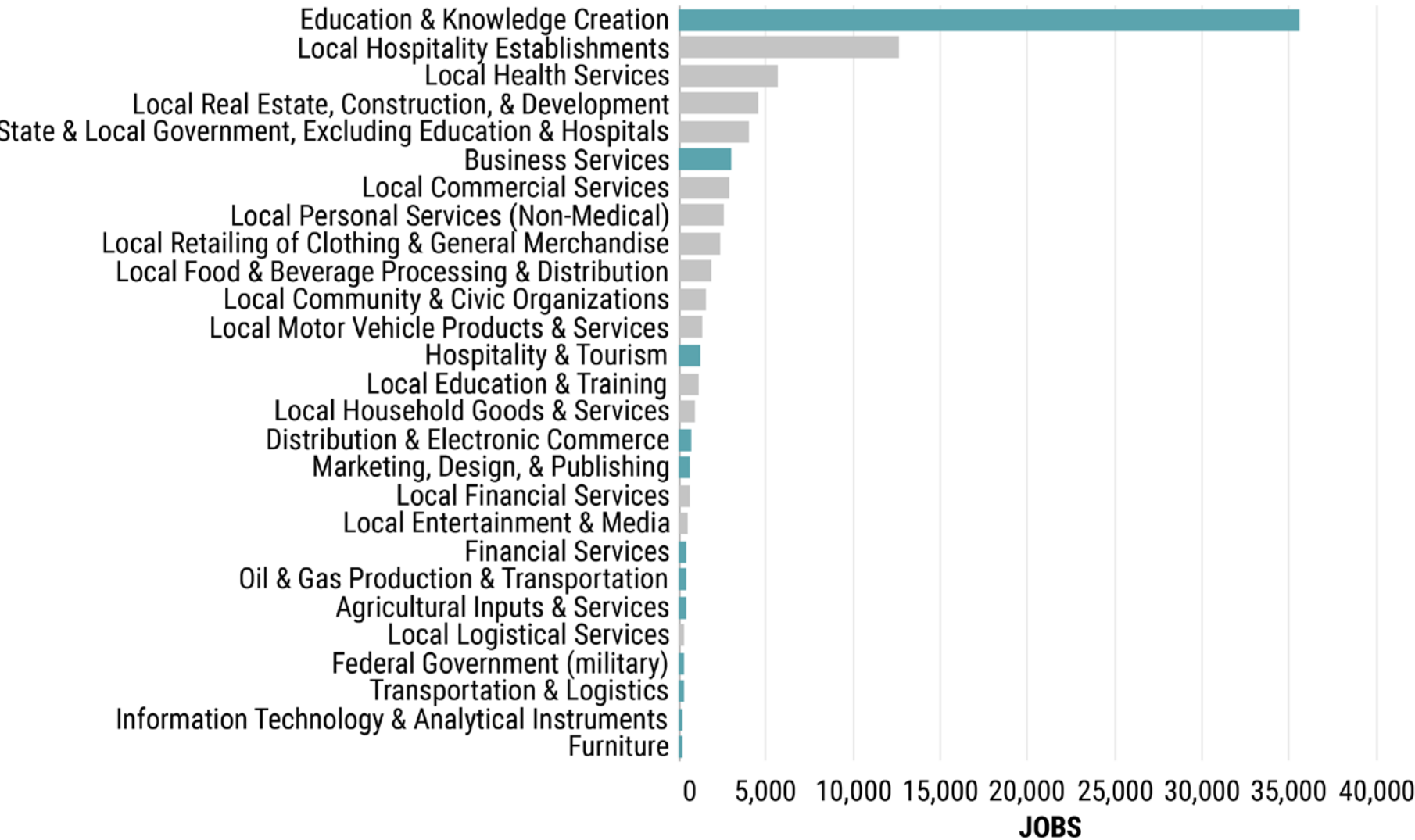
Notes: Geosciences includes atmospheric and ocean sciences. Non-Science & Engineering includes business, communication, education, humanities, law, social work, and all other non-science or engineering fields. Combines data on higher education institutions from the HERD long form (institutions with at least \$150,000 in R&D expenditures) and short form (institutions with less than \$1M in R&D expenditures) surveys for the 2023 fiscal year.

# EDA INDUSTRY CLUSTERS | JOB COUNT

College Station employment in selected industry clusters, 2024



Private Sector Expansion



## LOCAL CLUSTERS

- Primarily serve local markets
- Present in virtually every market
- Location is not dependent upon competitive advantage

## TRADED CLUSTERS

- Serve outside markets
- Free to choose where they locate
- Tend to be highly concentrated in few regions that have specific advantages

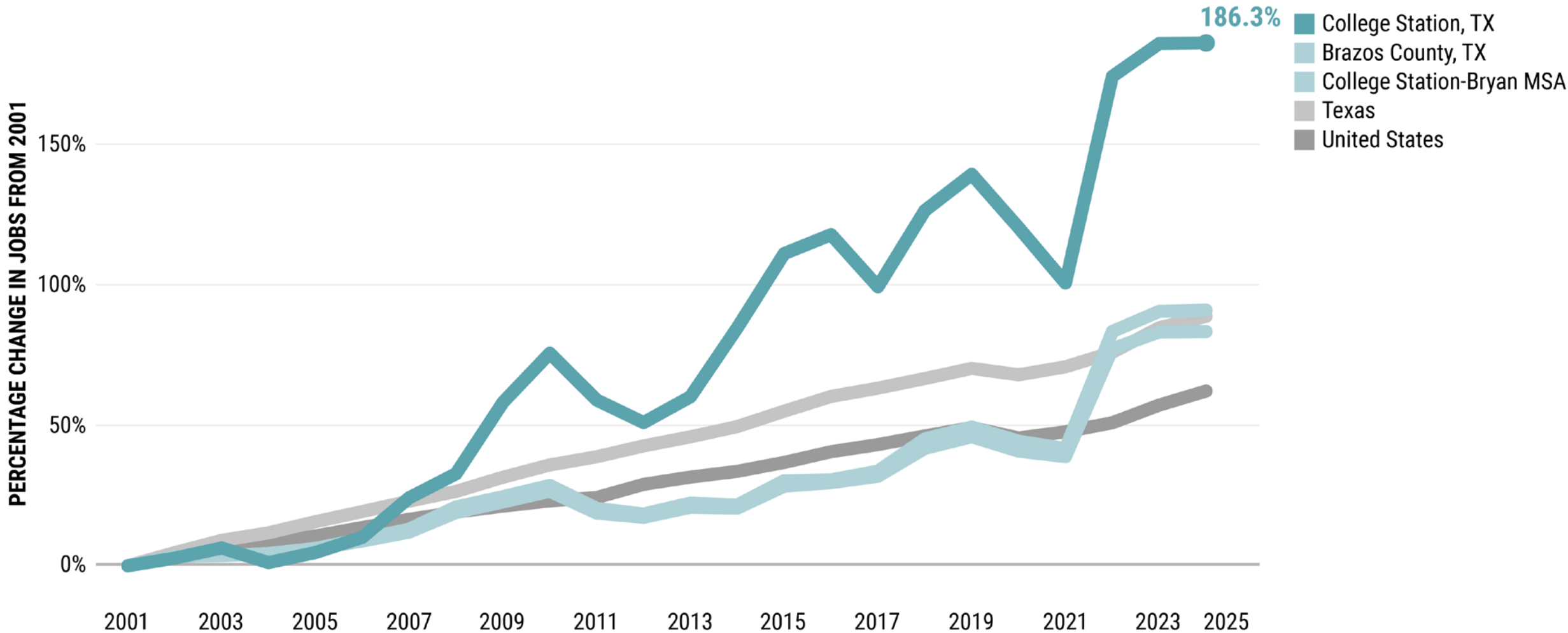
Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.  
Notes: College Station, Texas, is approximated by ZIP Codes 77840, 77841, 77842, 77843, 77844, and 77845. Only includes clusters with at least 200 jobs in College Station in 2024.

# INDUSTRY SECTORS | CUMULATIVE CHANGE

Comparative change for *HEALTHCARE* since 2001



Private Sector Expansion



Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.  
Notes: College Station, Texas, is approximated by ZIP Codes 77840, 77841, 77842, 77843, 77844, and 77845. Includes sectors with at least 50 jobs in College Station, in 2024.

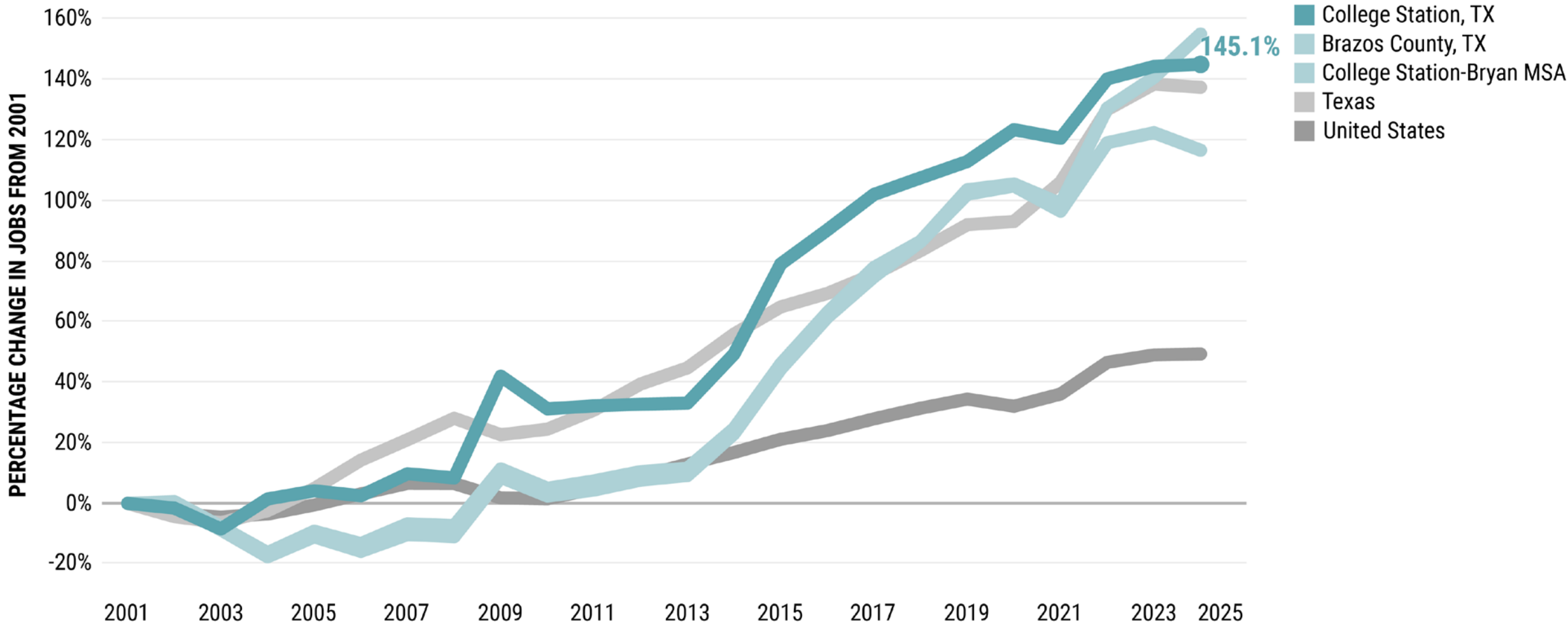


# EDA INDUSTRY CLUSTERS | CUMULATIVE CHANGE



Private Sector Expansion

Comparative change for *BUSINESS SERVICES* since 2001



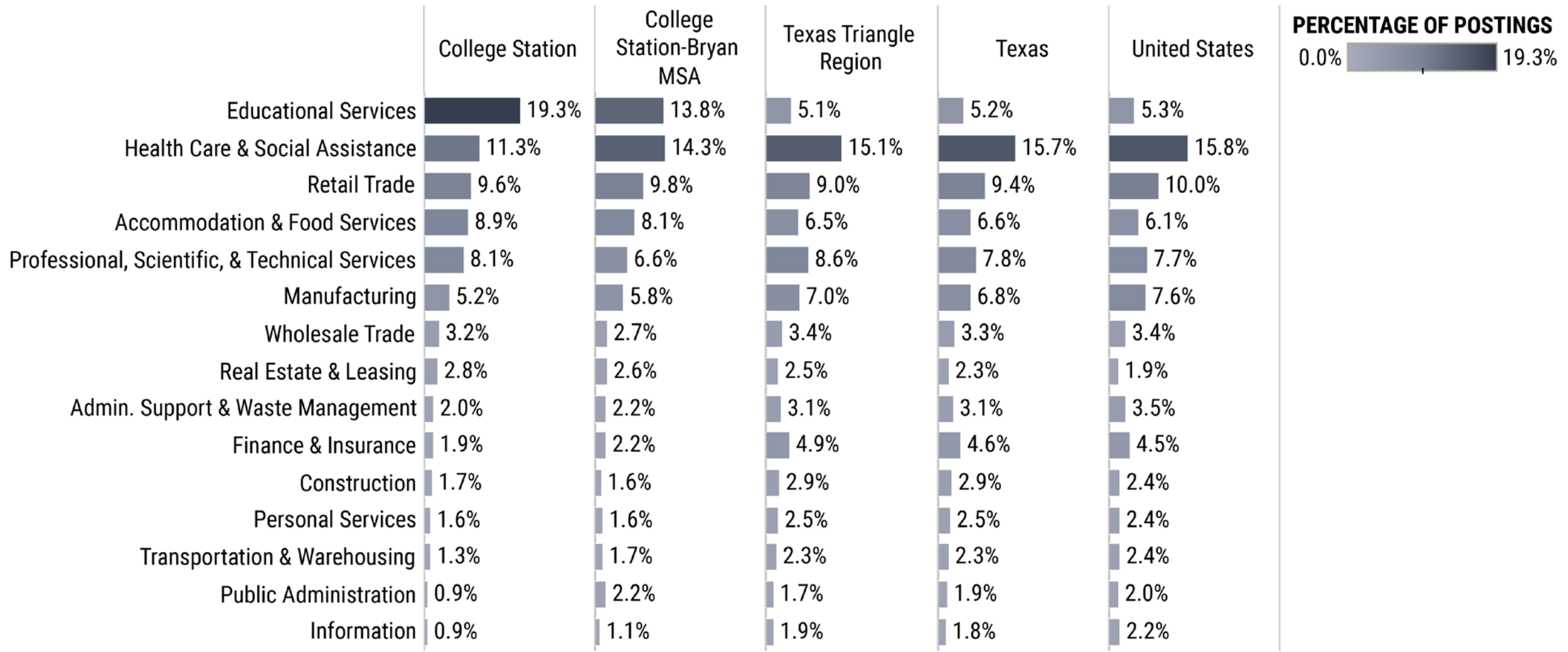
Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.  
Notes: College Station, Texas, is approximated by ZIP Codes 77840, 77841, 77842, 77843, 77844, and 77845. Includes sectors with at least 50 jobs in College Station in 2024.

# JOB POSTING DEMAND



Distinct Workforce Demand

*Based on an analysis of three years of job postings, June 2022–2025*



Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: Bars show percentage share of unique job postings each region by industry sectors. Job postings include non-staffing, unique, newly posted job postings for permanent full-time, part-time, and flexible positions, excluding internships, between June 2022–2025.

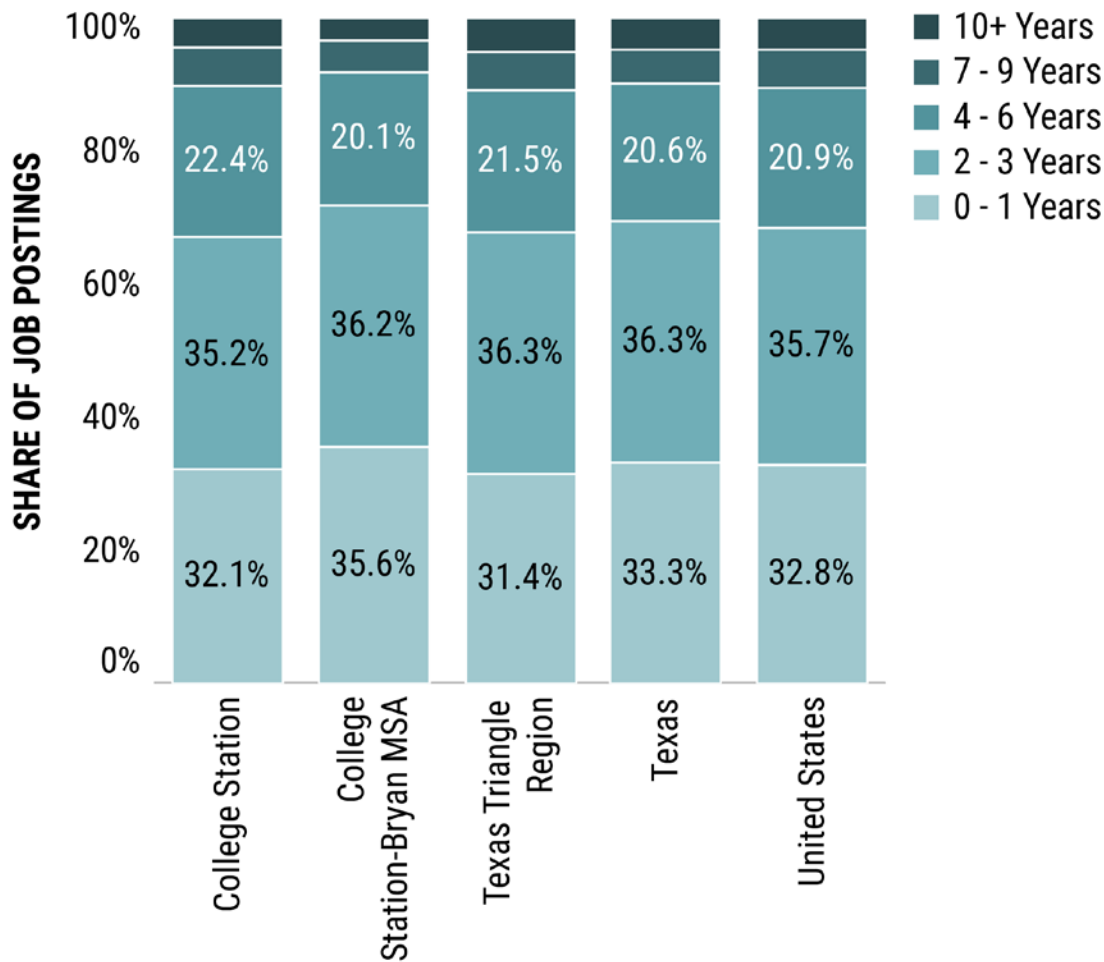
# JOB POSTINGS ANALYSIS | QUALIFICATIONS



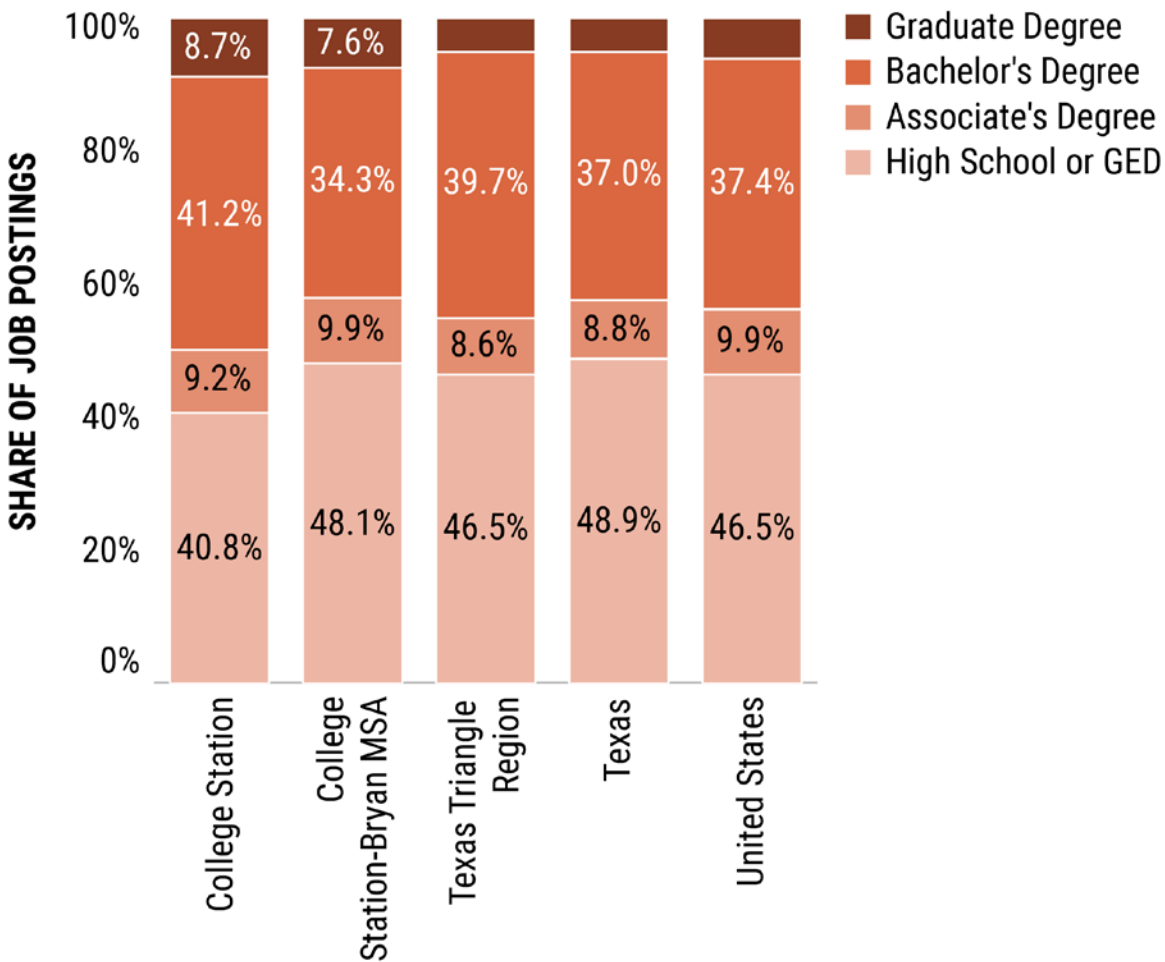
Distinct Workforce Demand

*Based on an analysis of three years of job postings, June 2022–May 2025*

Minimum Experience Requested



Minimum Education Requested



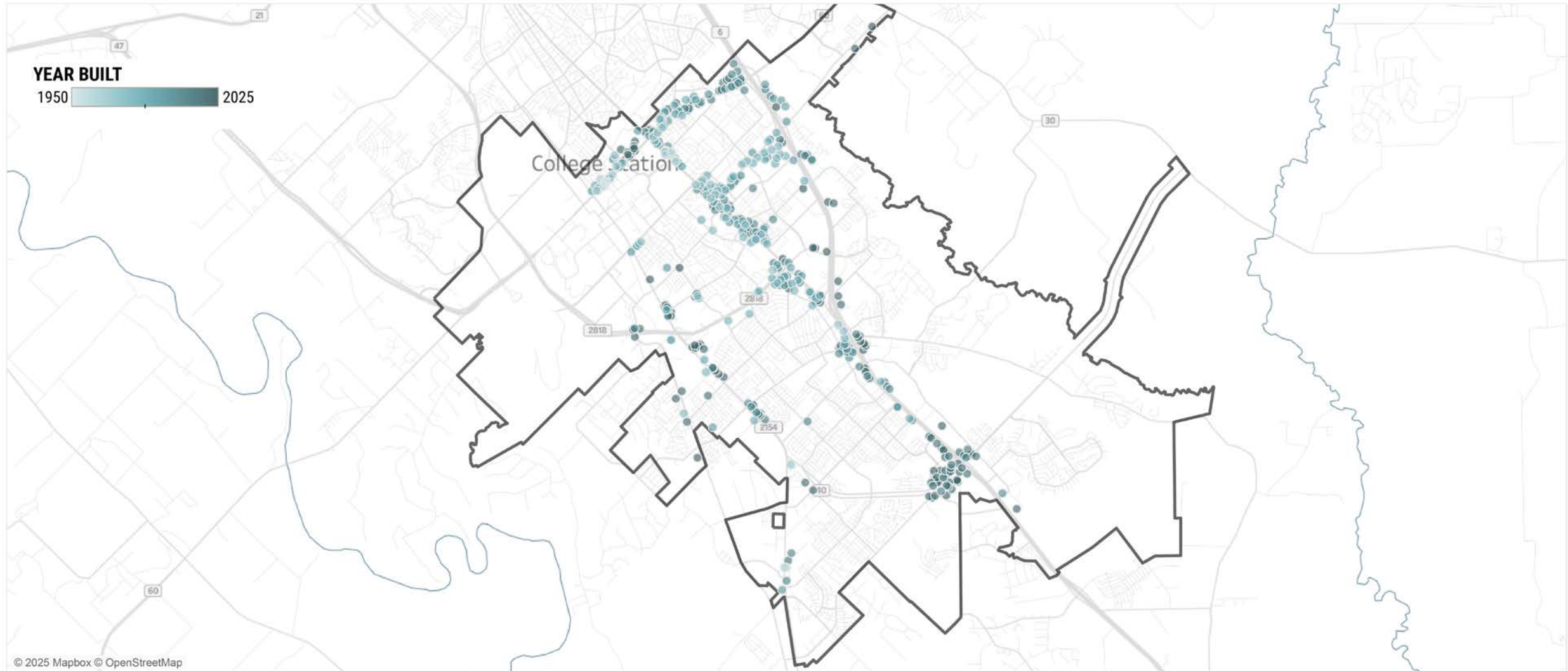
Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.  
Notes: Job postings include non-staffing, unique, new posted job postings for permanent full-time, part-time, and flexible positions, excluding internships, June 2022–May 2025.

# RETAIL AGE | COLLEGE STATION, TEXAS

*Year built, 1950–2025*



Corridor and Node Investment



Sources: CoStar Group; City of College Station; US Census Bureau, 2024 TIGER/Line Shapefiles; TIP Strategies, Inc.

Notes: Darker teals indicate newer buildings. All data are estimated by CoStar as of July 2025 and represent a snapshot in time.

# SWOT ANALYSIS

## Strengths

Assets and resources that can be built on to grow, strengthen, and diversify the local economy.

## Weaknesses

Liabilities and barriers to economic development that could limit economic growth potential.

## Opportunities

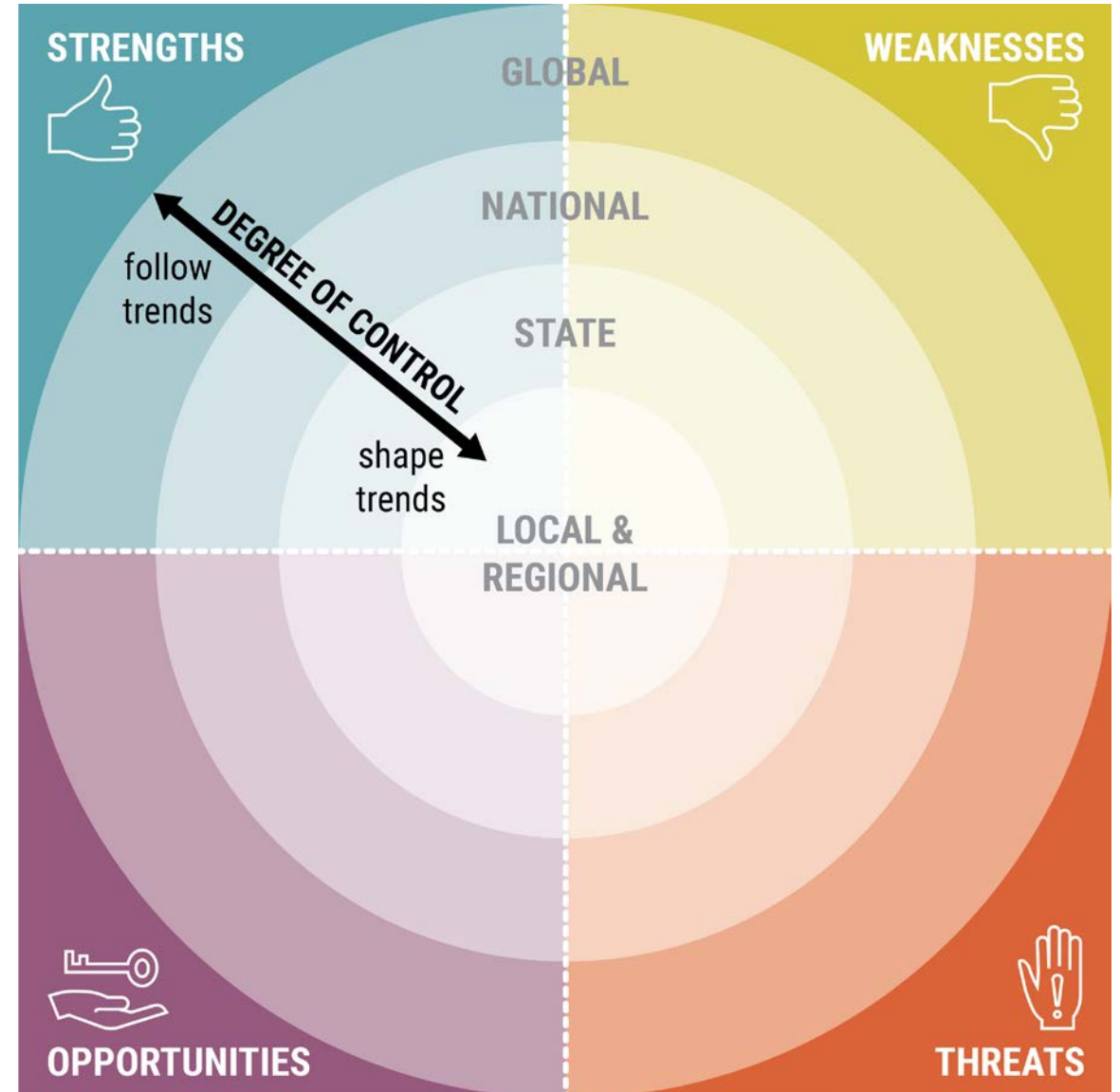
Competitive advantages and positive trends that hold significant potential for the attraction of new businesses, investments, and skilled workers.

## Threats

Unfavorable factors and trends (often external) that could negatively affect the local/regional economy.

## Degree of Control

The capacity to influence economic conditions and shape trends which decreases from the local to global scale.







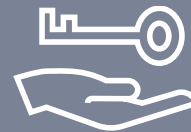
## STRENGTHS

- Texas A&M
- Location within Texas Triangle
- Proximity to major metros
- Regional hub for retail and amenities
- Sense of community
- Lower cost of living compared with nation
- Appeal to families
- Texas A&M venture funds
- Blinn College; small business certification and technical training
- City parks
- Tourism assets
- Aggie network



## WEAKNESSES

- Large transient student population
- Limited attraction and retention for early career professionals
- Few starter commercial properties for entrepreneurs
- High cost of housing development
- Overreliance on Texas A&M for employment and local identity
- Lack of traditional downtown experience; losing out on dollars going to Bryan
- Limited local transit outside of Texas A&M
- Office and industrial availability
- Comparatively low wages



## OPPORTUNITIES

- Develop non-student serving areas of the city
- Infill and densification; mixed-use and experiential developments
- Increase private sector diversification
- Connect workers to development/mentorship opportunities
- Invest in work-based learning, CTE
- Connect job seekers to local resources
- Leverage large pool of potential entrepreneurs
- Proximity to RELLIS campus
- Texas A&M enrollment growth pause
- Develop a local identity beyond A&M
- Become regional hub for medical services



## THREATS

- Housing affordability
- Perception of Bryan as more business-friendly
- Losing workers, residents to emerging Houston-area suburbs
- Infrastructure networks struggling to support growth
- Silos between organizations
- Inadequate medical services for growing population
- Shrinking greenfield opportunities
- Lack of employment opportunities for young professionals
- Impact of federal funding cuts on R&D opportunities
- Concerns about growth and change; balance with sense of community

# KEY ASSETS AND OPPORTUNITIES



Higher education ecosystem: Texas A&M, Blinn, RELLIS



Connectivity: Texas Triangle location, regional airport



Real estate development, redevelopment, and infill potential



Regional hub for retail and amenities



Quality of life and sense of community

# POTENTIAL OUTCOMES



Balancing growth and community character



Increasing business / industry development and diversifying tax base



Creating a vibrant place-based experience in new developments



Building a supportive ecosystem for entrepreneurs



Positioning College Station as a premiere location for business and tourism

# DRAFT FRAMEWORK

College Station will be the nation's most vibrant university community, a place where businesses thrive, innovation is embraced, and quality of life is unmatched, resulting in sustained prosperity and economic competitiveness.



# PLAN FRAMEWORK: FOCUS AREAS



## 1. IDENTITY

*Cultivate university and community synergies to create dynamic districts and authentic places that are attractive to residents, businesses, students, and visitors.*



## 2. INDUSTRY

*Expand a thriving, diverse foundation of talent, businesses and industry to create a diversified tax base and enhance economic opportunity.*



## 3. INNOVATION

*Establish College Station as a hub for technology-driven entrepreneurship, research and development, business formation and growth, and wraparound support.*



## 4. IGNITE

*Position the City of College Station as a proactive, efficient, and effective economic leader that strategically collaborates with local and regional partners to optimize opportunities.*

# NEXT STEPS

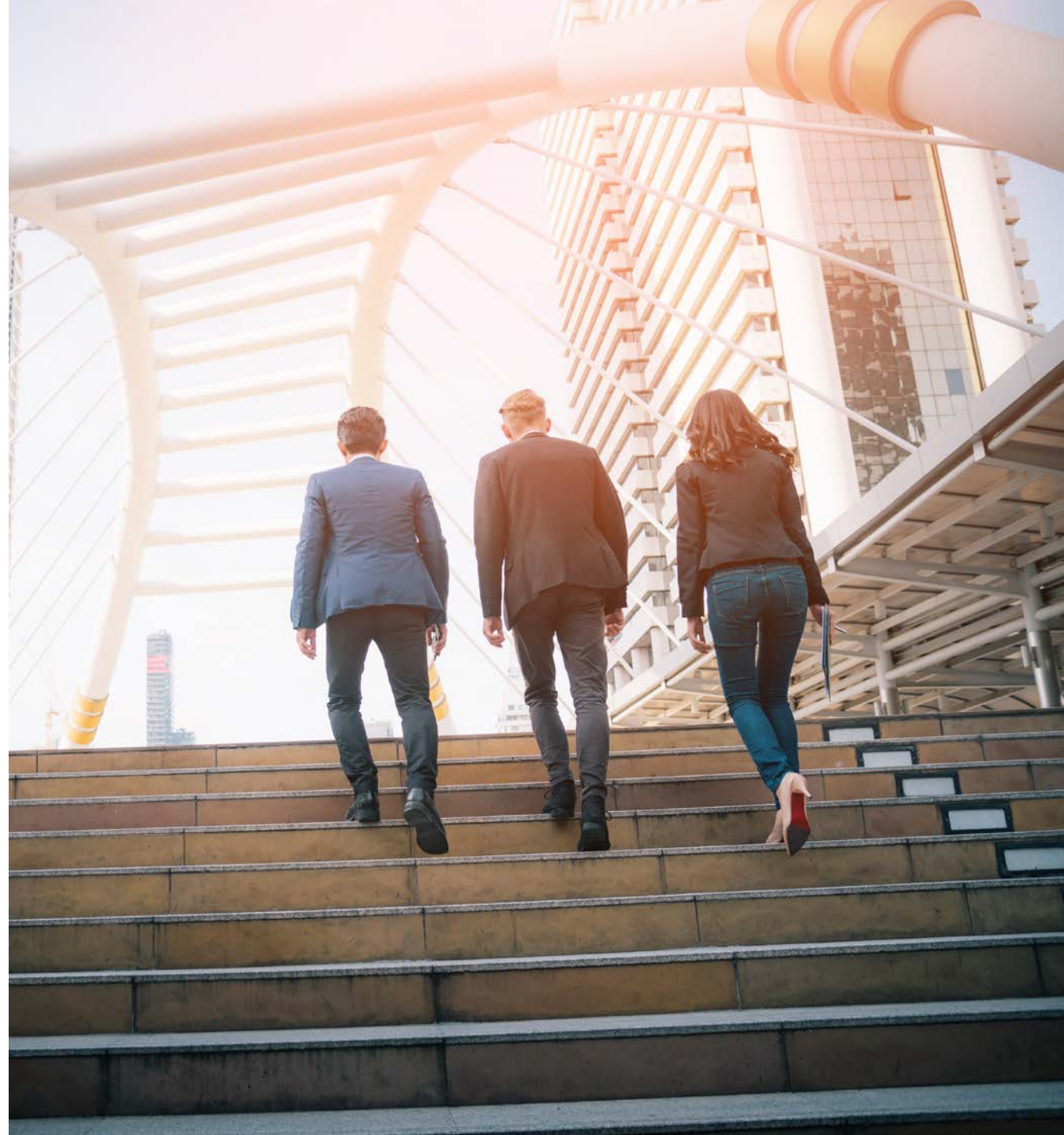
# NEXT STEPS

## Short-Term (September–October)

- ▶ Hold an opportunity workshop with the steering committee
- ▶ Provide a draft master plan to city staff
- ▶ Begin revising draft plan based on feedback

## Mid- to Long-Term (November–January)

- ▶ Finalize the draft master plan
- ▶ Create the implementation matrix
- ▶ Hold an implementation workshop







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with offices coast to coast*