



PROPOSED DOWNTOWN SPORTS & ENTERTAINMENT DISTRICT ECONOMIC IMPACT ANALYSIS

August 6, 2025

DRAFT



VISITOR INDUSTRY REVENUES

Hotel PFZ

Hotel Occupancy Tax

Net New District Revenue

VISITOR INDUSTRY ASSETS

Staying Competitive in the Convention Industry

Improved Alamodome for Major Events & Community Benefit

A New Music Venue for Community and Visitor Use

District Economic Development – New Activity

SPIN-OFF PUBLIC BENEFIT

Jobs

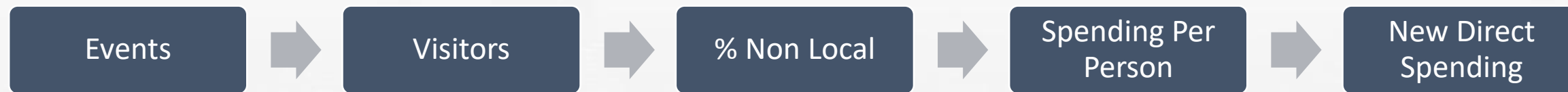
Wages

Tax Revenue

Quality of Life

Economic Development

OVERVIEW OF METHODOLOGY



PATRONS



EXHIBITORS



PROMOTERS



IS GENERATED BY...

DEDUCTIONS TO CALCULATE NET NEW SPENDING



No spending by locals



Downward adjustment to event days



Not all sales are taxable



No impacts from Alamodome lots

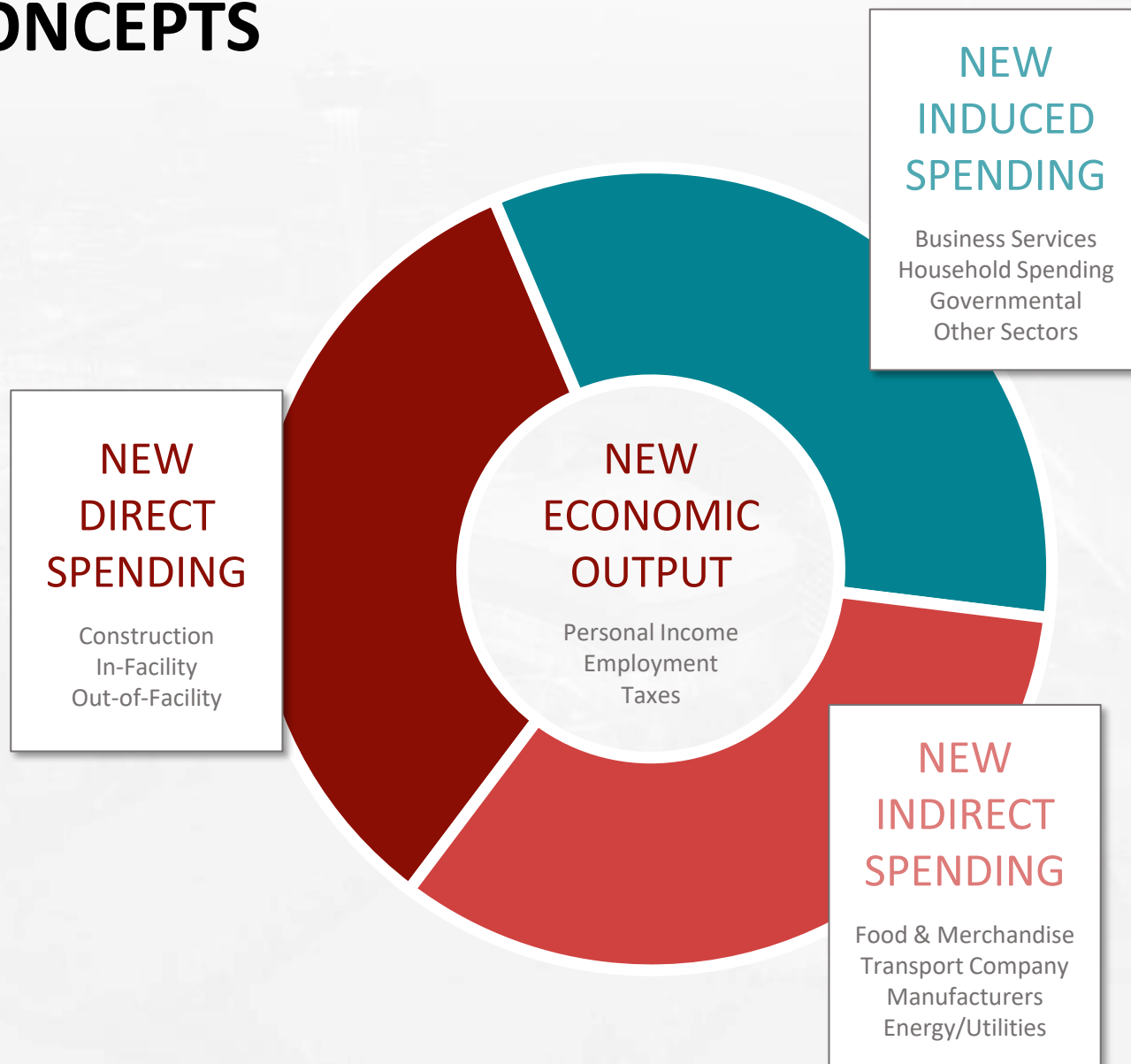


Not all attendees are using hotels



No property taxes are counted

IMPACT CONCEPTS

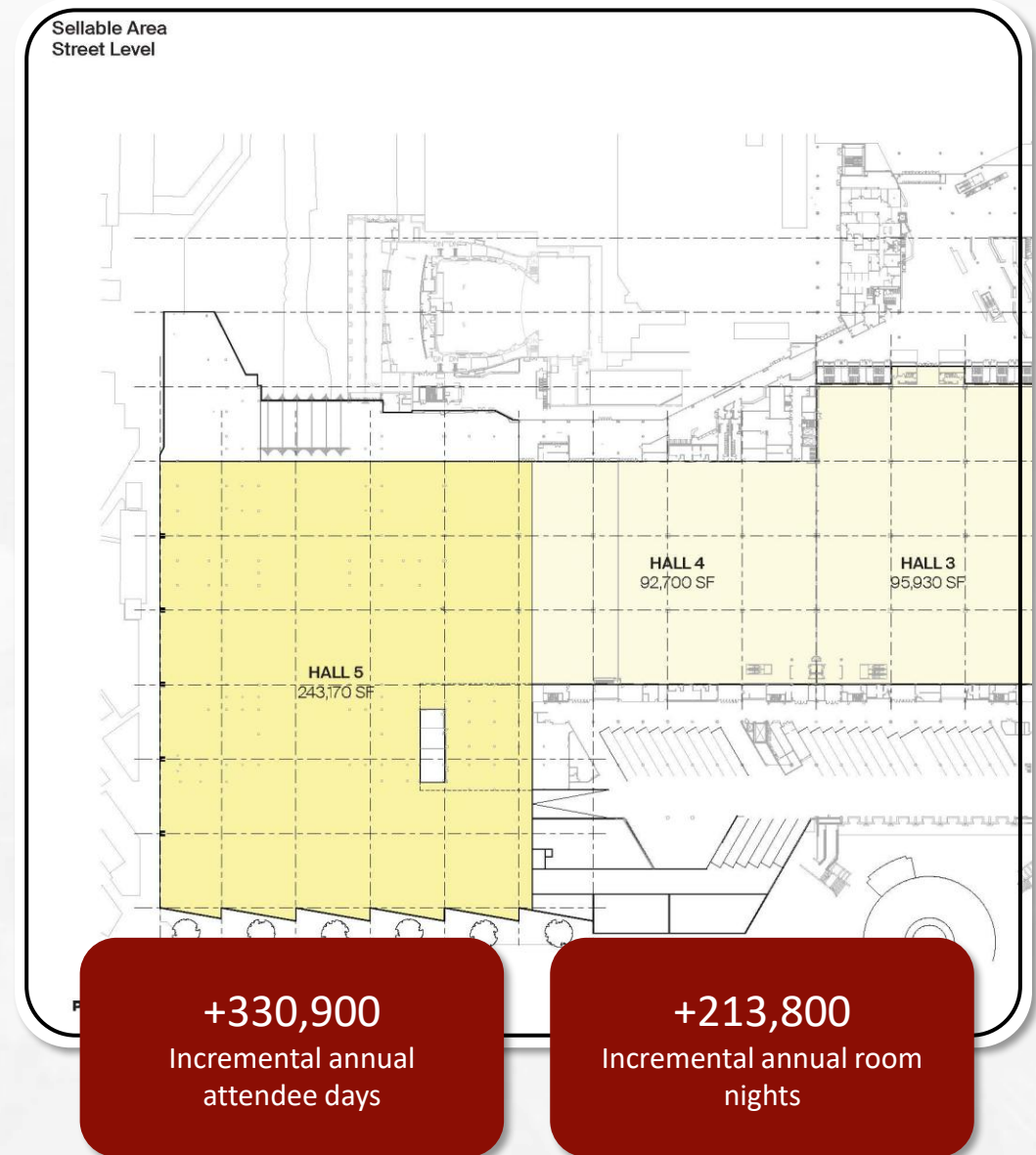


NEW SPORTS & ENTERTAINMENT DISTRICT OVERVIEW



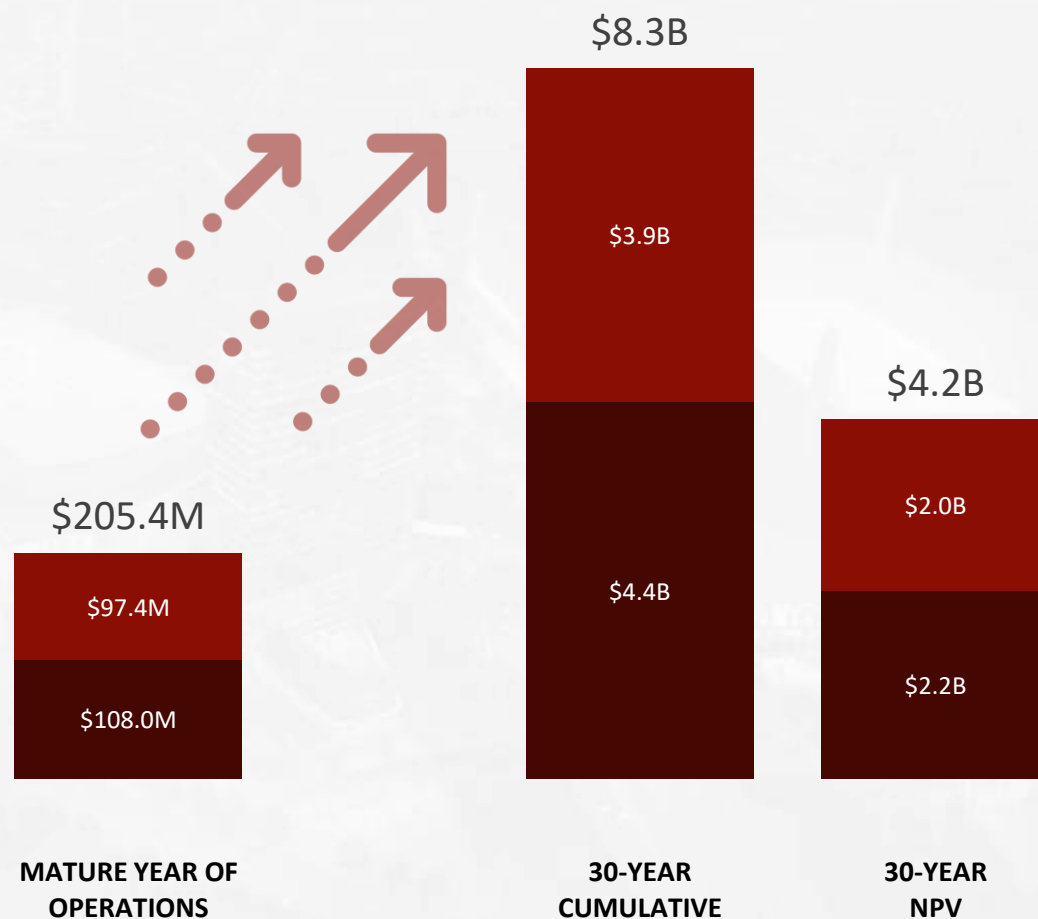
CONVENTION CENTER

- Addition of 192,000 square feet of net new contiguous exhibit space
- Expanding the existing 513,900-square-foot hall to approximately 706,000 square feet.
- Added 65,600 square feet of meeting space and a large ballroom.



CONVENTION CENTER IMPACTS

- Personal Income...
 - Annual (Mature Year): **\$58.3M**
 - 30-Year (Cumulative): **\$2.4B**
 - 30-Year (NPV): **\$1.2B**
- Employment (Mature Year): **1,600**
- City Tax Collections...
 - 30-Year (Cumulative): **\$208.7M**
 - 30-Year (NPV): **\$106.5M**



Direct Spending

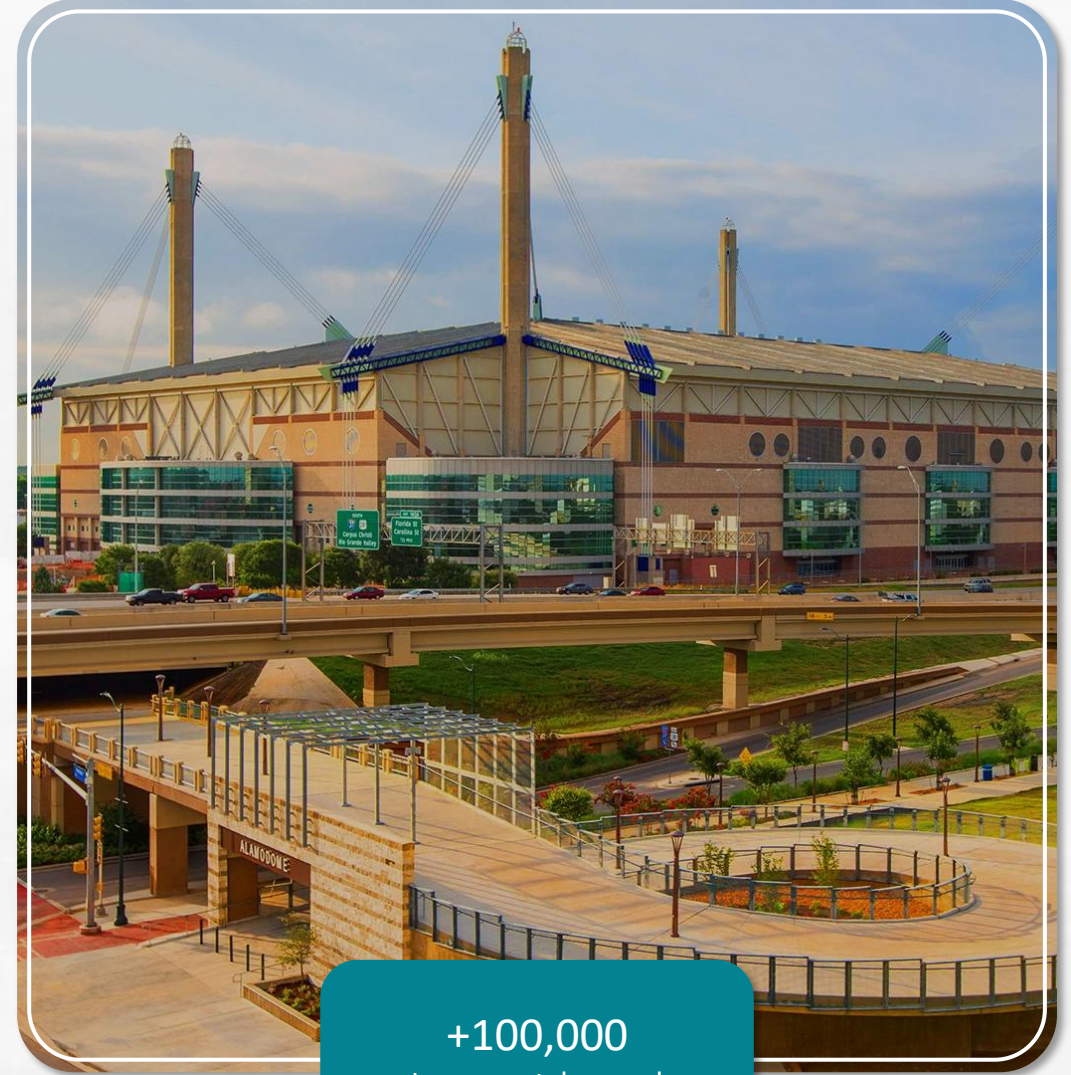


Indirect/Induced Spending



ALAMODOME

- Phased improvement plan prioritizing strategic upgrades over time
- FF&E improvements
- Enhanced F&B on lower level concourses
- Improved third-party event spaces
- Digital placemaking investments
- Upgrading entry plazas



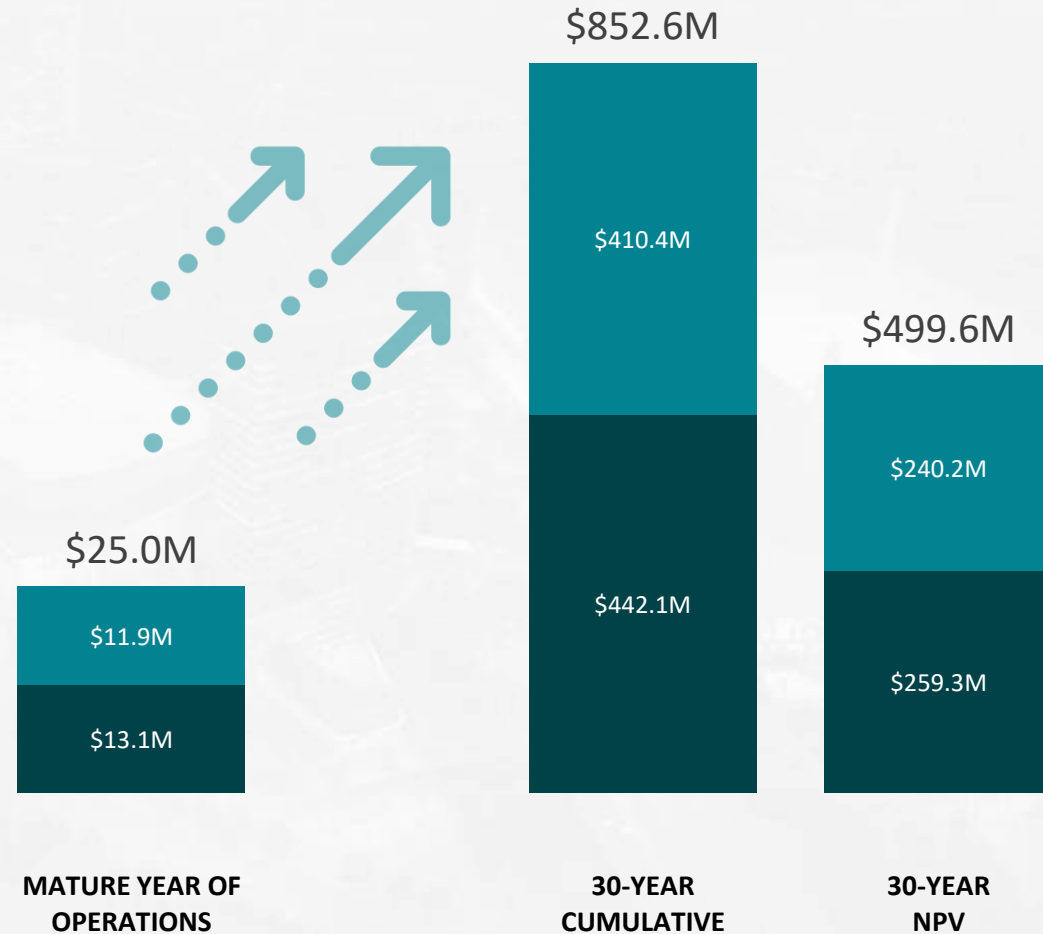
+100,000

Incremental annual
attendee days



ALAMODOME IMPACTS

- Personal Income...
 - Annual (Mature Year): **\$8.0M**
 - 30-Year (Cumulative): **\$262.9M**
 - 30-Year (NPV): **\$153.9M**
- Employment (Mature Year): **237**
- City Tax Collections...
 - 30-Year (Cumulative): **\$17.4M**
 - 30-Year (NPV): **\$10.3M**



Direct Spending

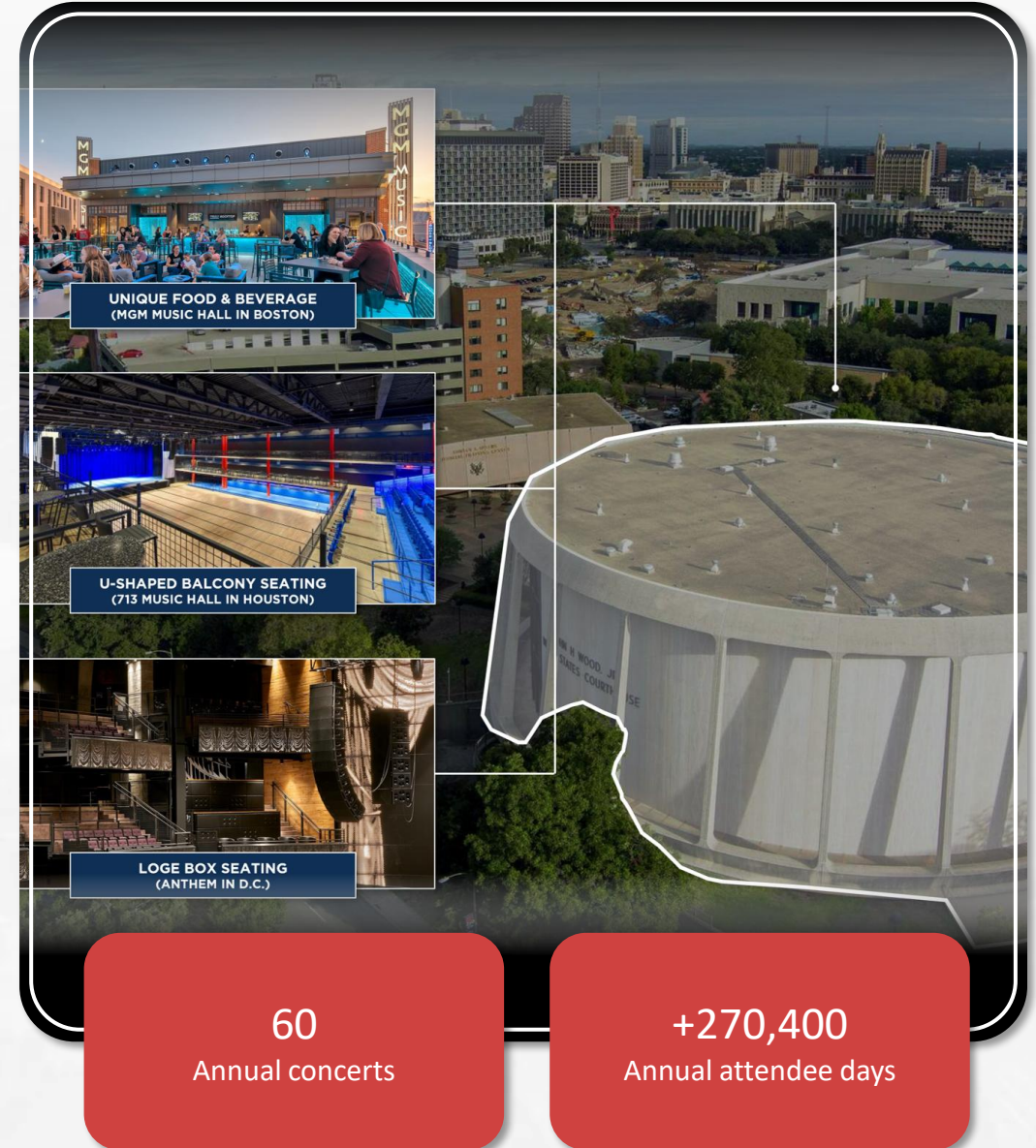


Indirect/Induced Spending



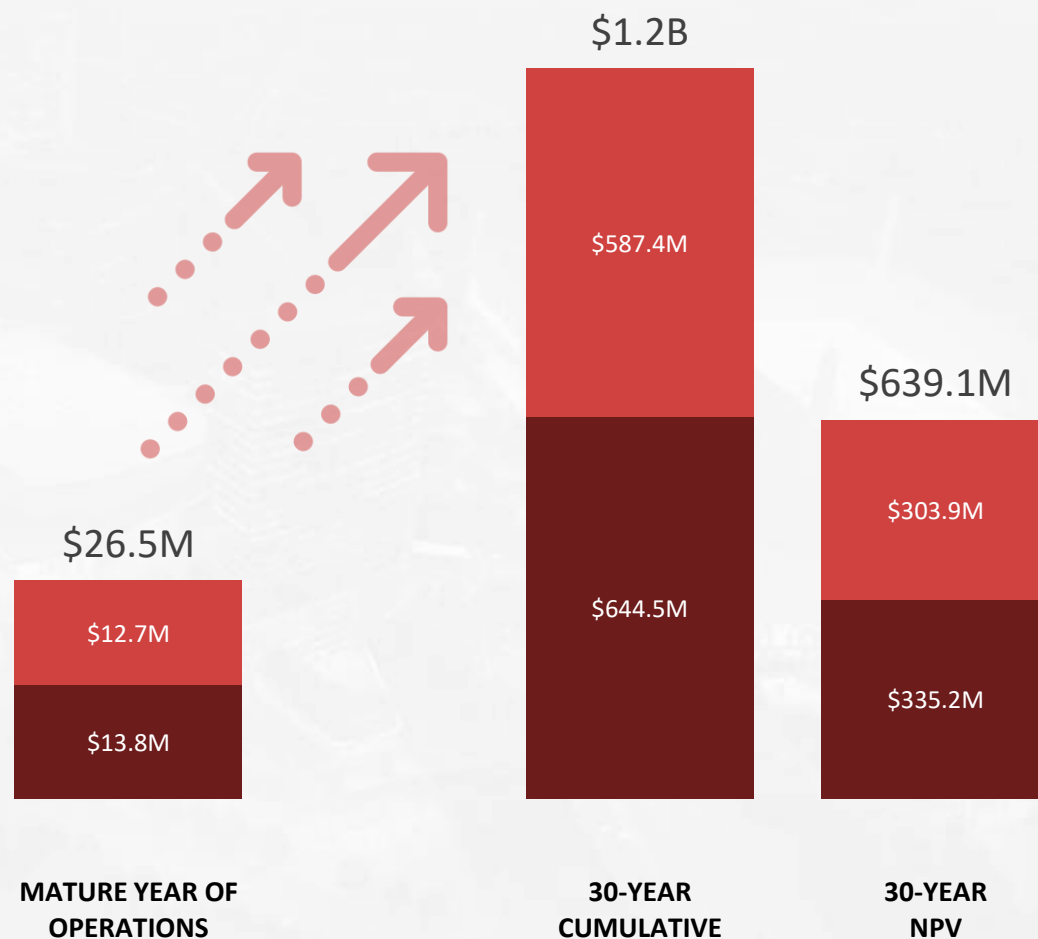
MUSIC VENUE

- 4,000–5,000-seat mid-sized indoor music venue
- Redevelopment of John H. Wood Jr. Federal Courthouse
- Flexible, purpose-built facility for concerts, comedy, community events, and large convention sessions
- Premium amenities: U-shaped balcony seating, high-end F&B with outdoor options, premium loge seating, integrated LED/art, flexible meeting/banquet spaces



MUSIC VENUE IMPACTS

- Personal Income...
 - Annual (Mature Year): **\$7.9M**
 - 30-Year (Cumulative): **\$365.4M**
 - 30-Year (NPV): **\$189.5M**
- Employment (Mature Year): **223**
- City Tax Collections...
 - 30-Year (Cumulative): **\$17.6M**
 - 30-Year (NPV): **\$8.7M**



Direct Spending

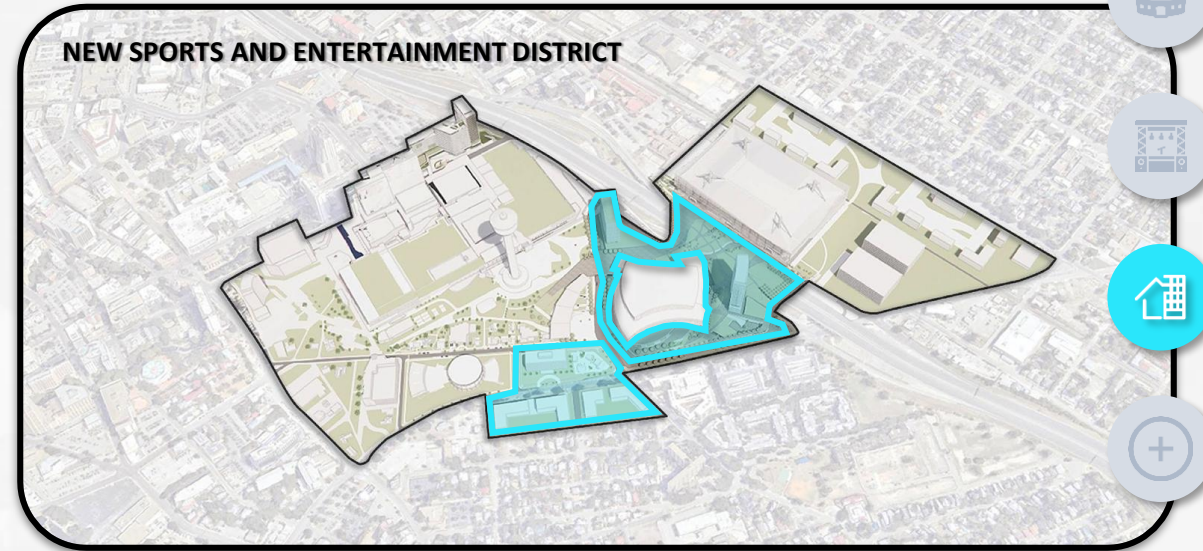


Indirect/Induced Spending



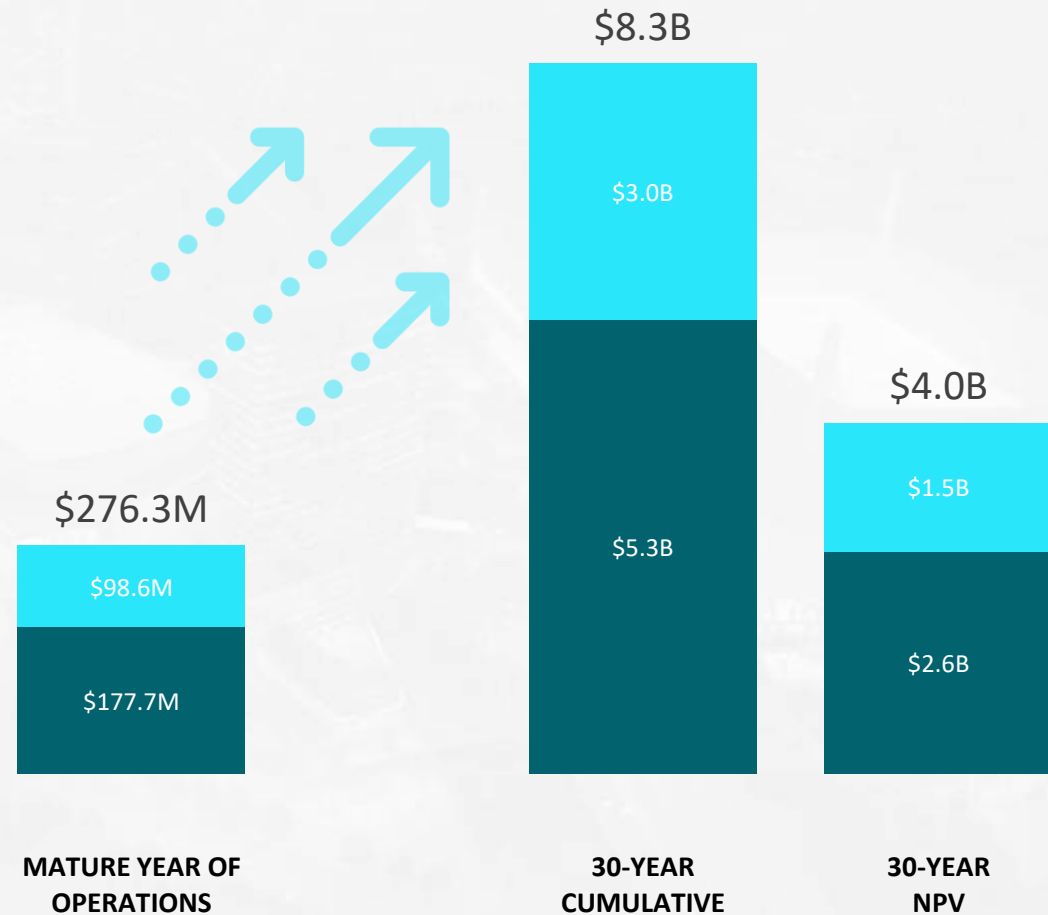
MIXED-USE DISTRICT

- Assumed program: 1,920 residential units, 445 hotel rooms (2–3 properties)
- 220,000 sq. ft. office space and 95,000 sq. ft. restaurant/retail
- Designed to complement Convention Center, Alamodome, and music venue investments
- Projected ~2.4 million resident & attendee days annually at full buildout



MIXED-USE DISTRICT IMPACTS

- Personal Income...
 - Annual (Mature Year): **\$77.4M**
 - 30-Year (Cumulative): **\$2.3B**
 - 30-Year (NPV): **\$1.1B**
- Employment (Mature Year): **1,300**
- City Tax Collections...
 - 30-Year (Cumulative): **\$106.8M**
 - 30-Year (NPV): **\$56.5M**

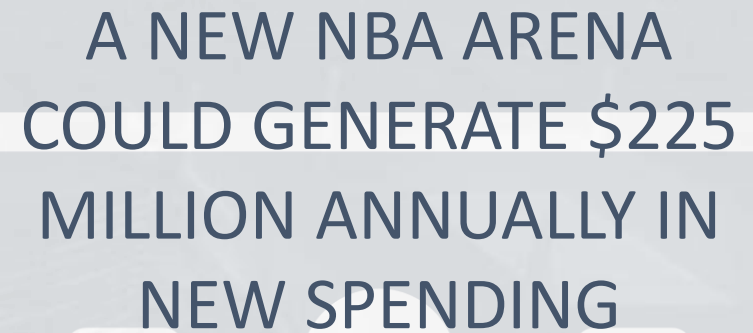


Direct Spending
 Indirect/Induced Spending



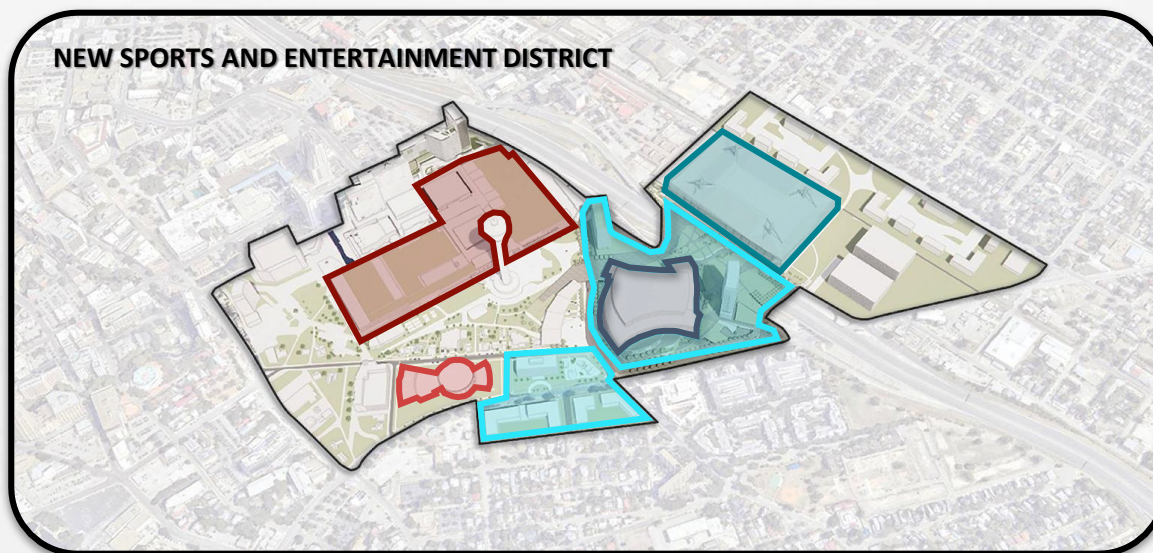
NEW SPURS ARENA IMPACT

- \$225M net new direct spending annually vs. current Frost Bank Arena levels.
- \$318M net new total output after accounting for Frost Bank Arena's impact.
- Strong upside from premium seating, sponsorships, concessions, and added events.
- Estimates align with studies in similar markets.



A NEW NBA ARENA
COULD GENERATE \$225
MILLION ANNUALLY IN
NEW SPENDING

TOTAL IMPACTS



Total Combined...	Annual, Mature Year	30-Year NPV
Direct Spending	\$313.3M	\$4.0B
Economic Output	\$534.6M	\$9.4B
Personal Income	\$152.0M	\$2.7B
Employment	3,360	-
City Tax Collections	\$9.6M	\$182.3M



DISTRICT CONSTRUCTION PERIOD IMPACTS

- \$1B in construction = \$665M direct spending in San Antonio.
- \$1.2B total output per \$1B investment when applying local multipliers.
- 70% of costs assumed for labor; 80% of labor sourced locally; 35% of material purchases sourced locally.
- Output per \$1.0B invested estimated at \$1.2B
- Total projected district investment: \$6B–\$8B over 12–15 years.



For Every \$1 Billion In
District Construction
Investment, The City
Receives \$665 Million In
Direct Labor And
Materials Spending

QUALITATIVE IMPACTS

**TRANSFORMATIVE
AND ICONIC EFFECTS**



QUALITY OF LIFE FOR RESIDENTS



**NEW
VISITATION**



TALENT RETENTION ATTRACTION



SUPPORTING BUSINESS GROWTH



**ANCHOR FOR
REVITALIZATION**



**COMMUNITY IDENTITY
& CIVIC PRIDE**

