

LOOKING TO THE FUTURE OF CAMPUS RECREATION



NIRSA 2007 Annual Conference
April 20th

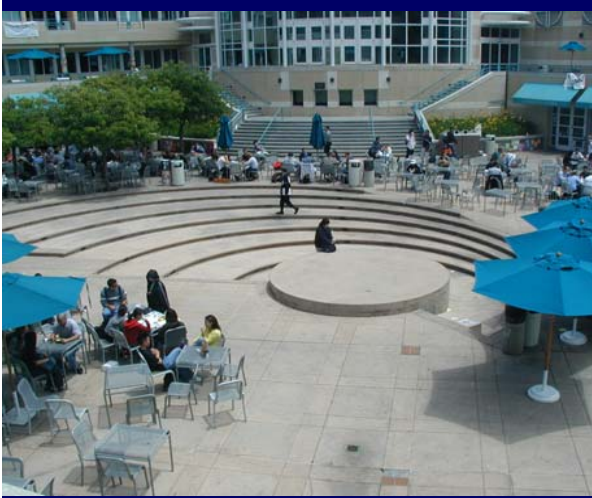
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Presentation Outline

- Introduction
- A Quick Overview of Historical Trends
- Projecting Future Trends Based on Opportunities & Challenges
- Q & A / Discussion



Introduction



BRAILSFORD & DUNLAVEY



Introduction



- My Experiences
- My Passions
- My Goals for This Presentation

- An Unexpected Assignment
- The NIRSA Community



Introduction



- My Experiences

- My Passions

- My Goals for This Presentation

- The Reluctant Student
- Managing Institutional Ambition
- Advancing the State of the Industry



Introduction



- My Experiences
- My Passions
- My Goals for This Presentation

- Share Some Facts & Ideas
- Stimulate Thought & Discussion
- Benefit From Your Challenges



Overview of Historical Trends



Recreation Facility Evolution

Post WWI Era (the 1920's & 30's)

Post WWII Era (the 1950's)

The Physical Education Era (the 1970's)

The Contemporary Era (1985 to Present)



Overview of Historical Trends



Recreation Trends >>> Cultural Shifts

Physical Education Era

Contemporary Era

P.E. & Athletics Focus



Recreation / Social Focus

Utilitarian Function



Dynamic Social Space

Limited Audience



Maximized Appeal

Shared Use Facilities



Special Purpose Buildings

Directed Programs



Market Driven Services

Free Employee Use



Fee Based Memberships

Male Dominated



Gender Balanced

Active Adults are Young



All Ages Groups Are Active

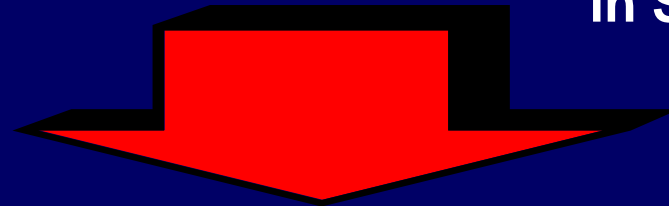


Overview of Historical Trends



Recreation Trends >>> Higher Ed. Responses

Demand For Recreation		Value For Substantial Fees
Value Added Services		Substantial Spec Revenue
Greater Business Focus		More Skilled / Larger Staffs => Budgets
Title IX Mature Culture		Female Intramurals & Drop-in Sports



Capitalized Revenue Streams Allow Large Projects to be Feasible Within Tolerable Risk Parameters



Projecting Future Trends



When Do Colleges & Universities Build?

- When Student Supply Is Up, Schools Build to Accommodate Growth
- When Student Supply Is Down, Schools Build to be More Competitive
- When Student Supply is Stable, Schools Build to Support their Mission



Projecting Future Trends



What Forces Will Impact Us?

- Demographics
- Cultural Shifts
- Educational Philosophies
- Economic realities
- Public Policy



Projecting Future Trends



Demographics

	% of Grads	M/F Dist.
Post WWI Era (the 1920's & 30's)	5%	60/40
Post WWII Era (the 1950's)	14%	68/32
The Physical Education Era (the 1970's)	36%	59/41
The Contemporary Era (1985 to Present)	43%	48/52
	55%	42/58



Projecting Future Trends



Demographics

- The “Baby Boom Echo” Will be over in 2010!

Exhibit A-1a: Projected Change in the Number of High-School Graduates, 2006-7 to 2016-17

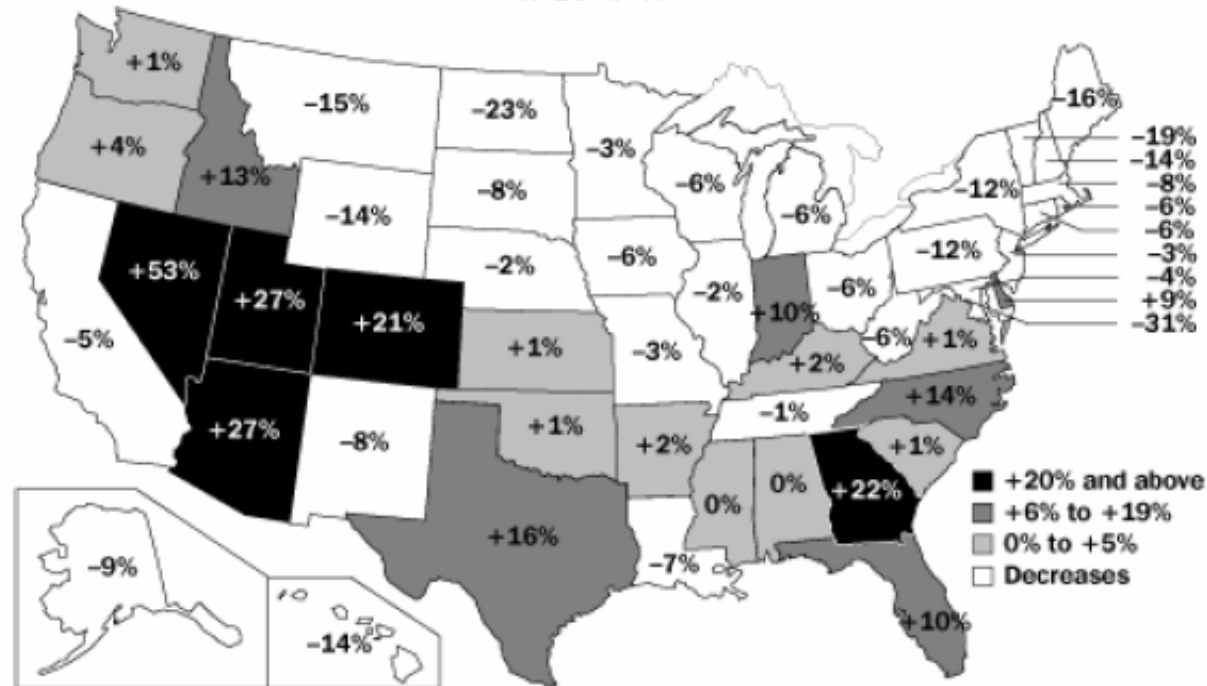
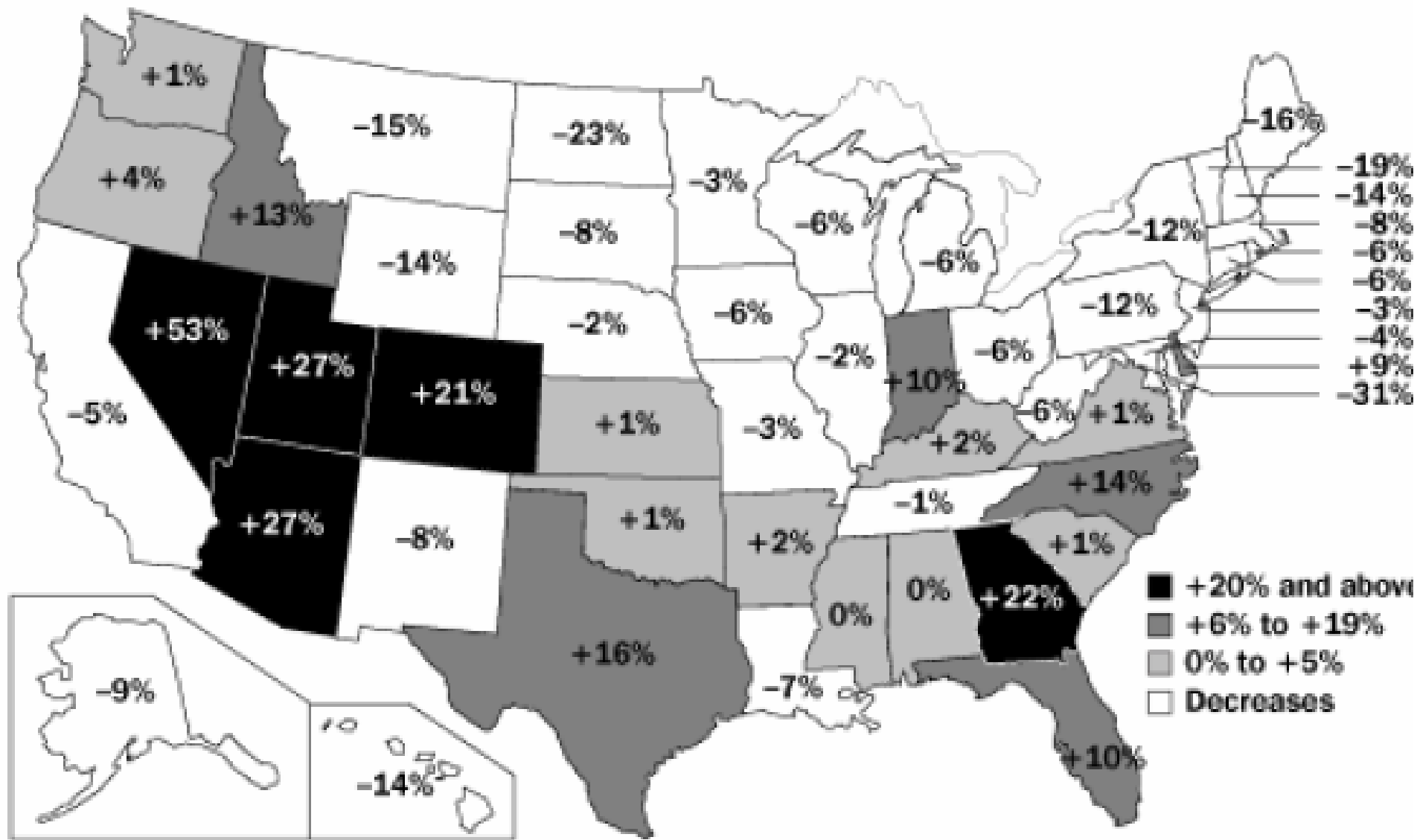


Exhibit A-1a: Projected Change in the Number of High-School Graduates, 2006-7 to 2016-17



Projecting Future Trends



Demographics

- The “Baby Boom Echo” Will be over in 2010!
- Many Factors Affect an Institution’s Enrollment & Composition
 - State & regional attendance rates
 - Persistence rates
 - Pre-disposition toward living on-campus
 - Local real estate markets
 - Quality of the campus environment
 - Financial aid programs & pricing strategies
 - Academic philosophies
 - Public Policy

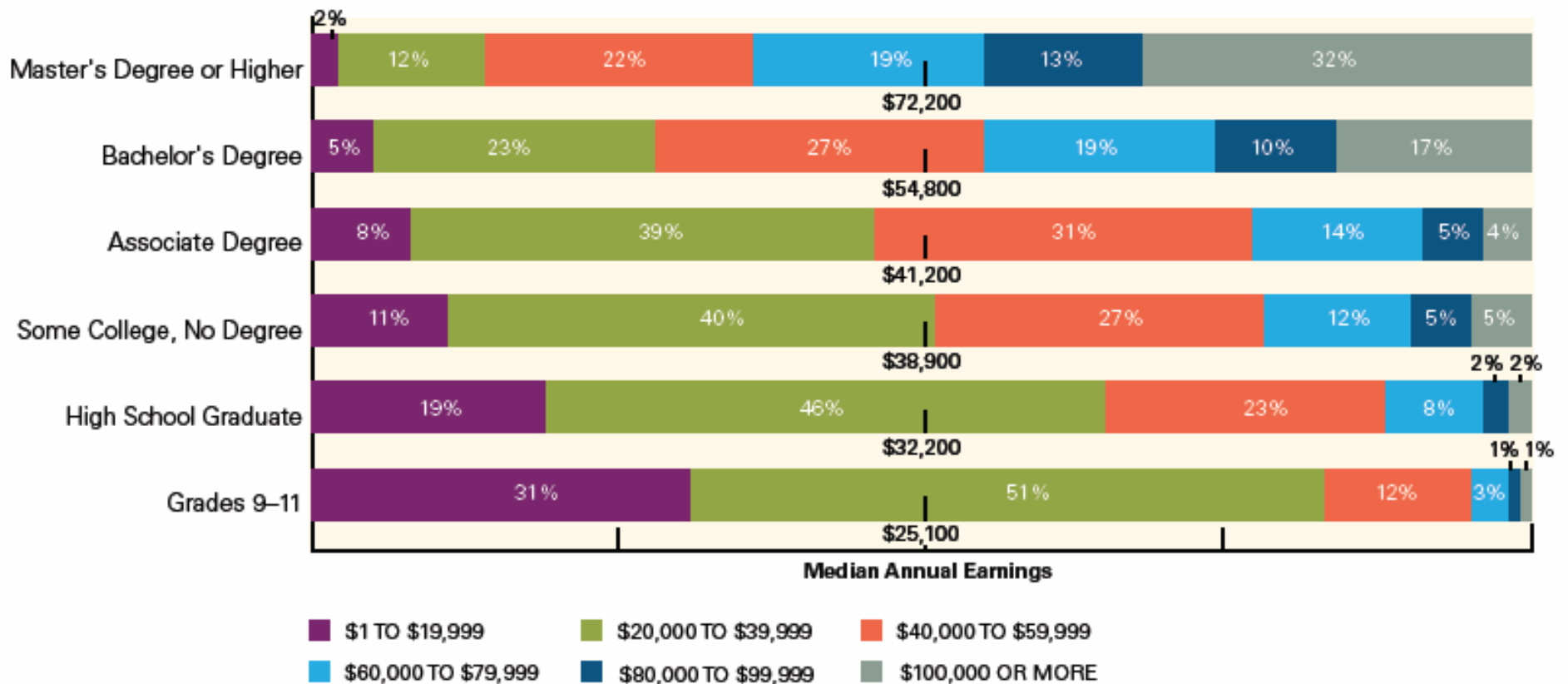


Projecting Future Trends



Demographics – The Value of Education

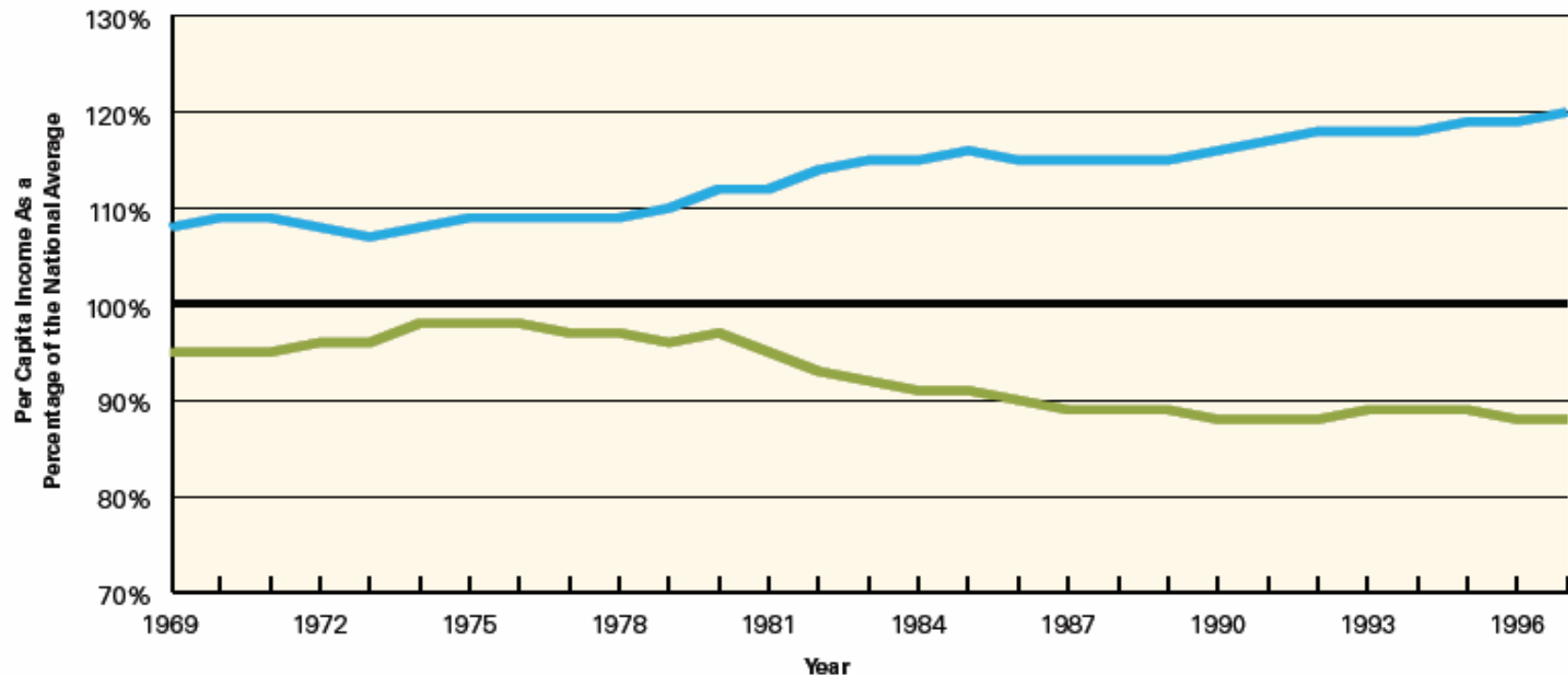
Ages 35 - 45



Projecting Future Trends



Demographics



■ 10 METROPOLITAN AREAS WITH HIGHEST PROPORTION OF COLLEGE GRADUATES IN 1980:
34.8 PERCENT ON AVERAGE HAD A BACHELOR'S DEGREE OR HIGHER

■ 10 METROPOLITAN AREAS WITH LOWEST PROPORTION OF COLLEGE GRADUATES IN 1980:
17.4 PERCENT ON AVERAGE HAD A BACHELOR'S DEGREE OR HIGHER



Projecting Future Trends

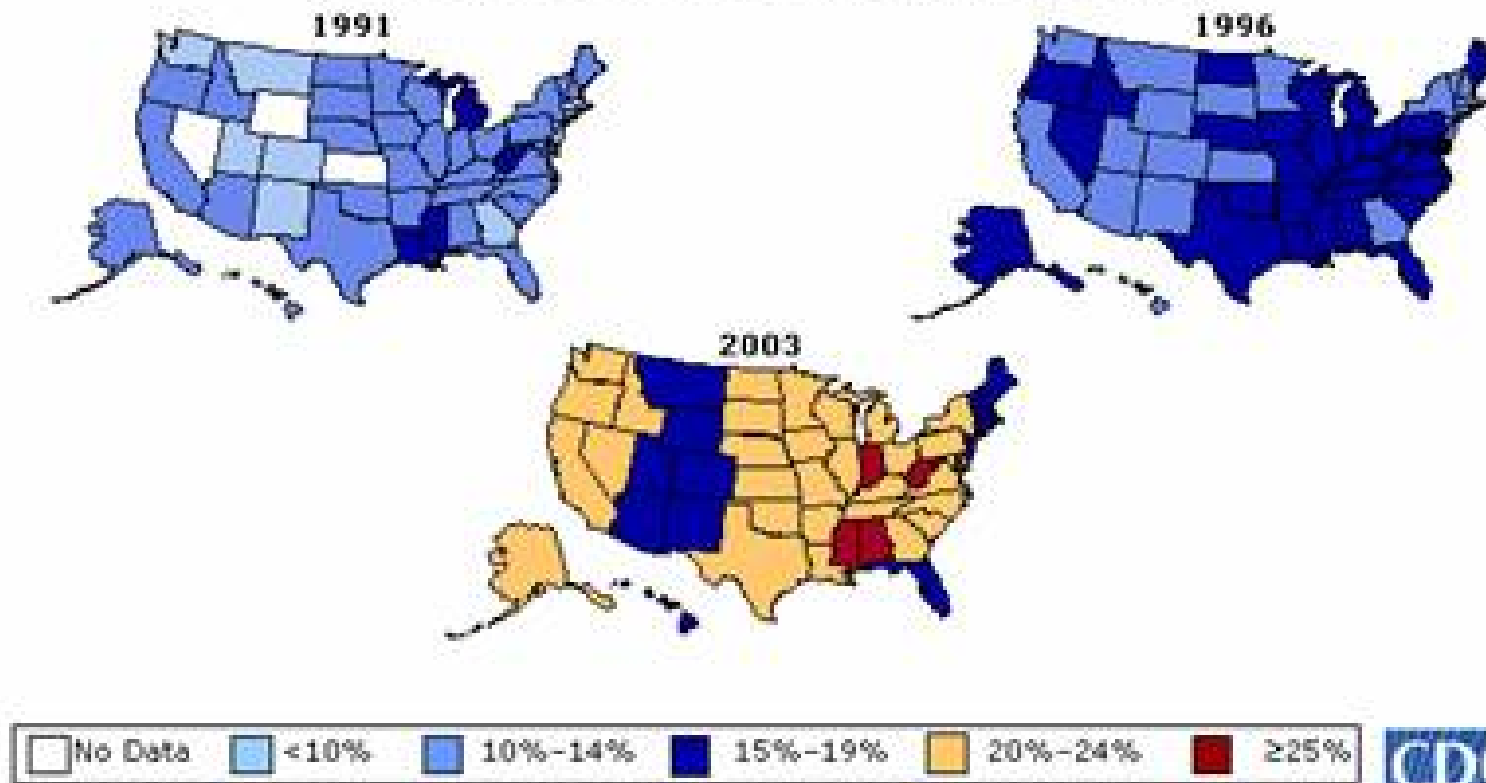


Demographics

Obesity Trends* Among U.S. Adults

BRFSS, 1991, 1996, 2003

(*BMI ≥30, or about 30 lbs overweight for 5'4" person)



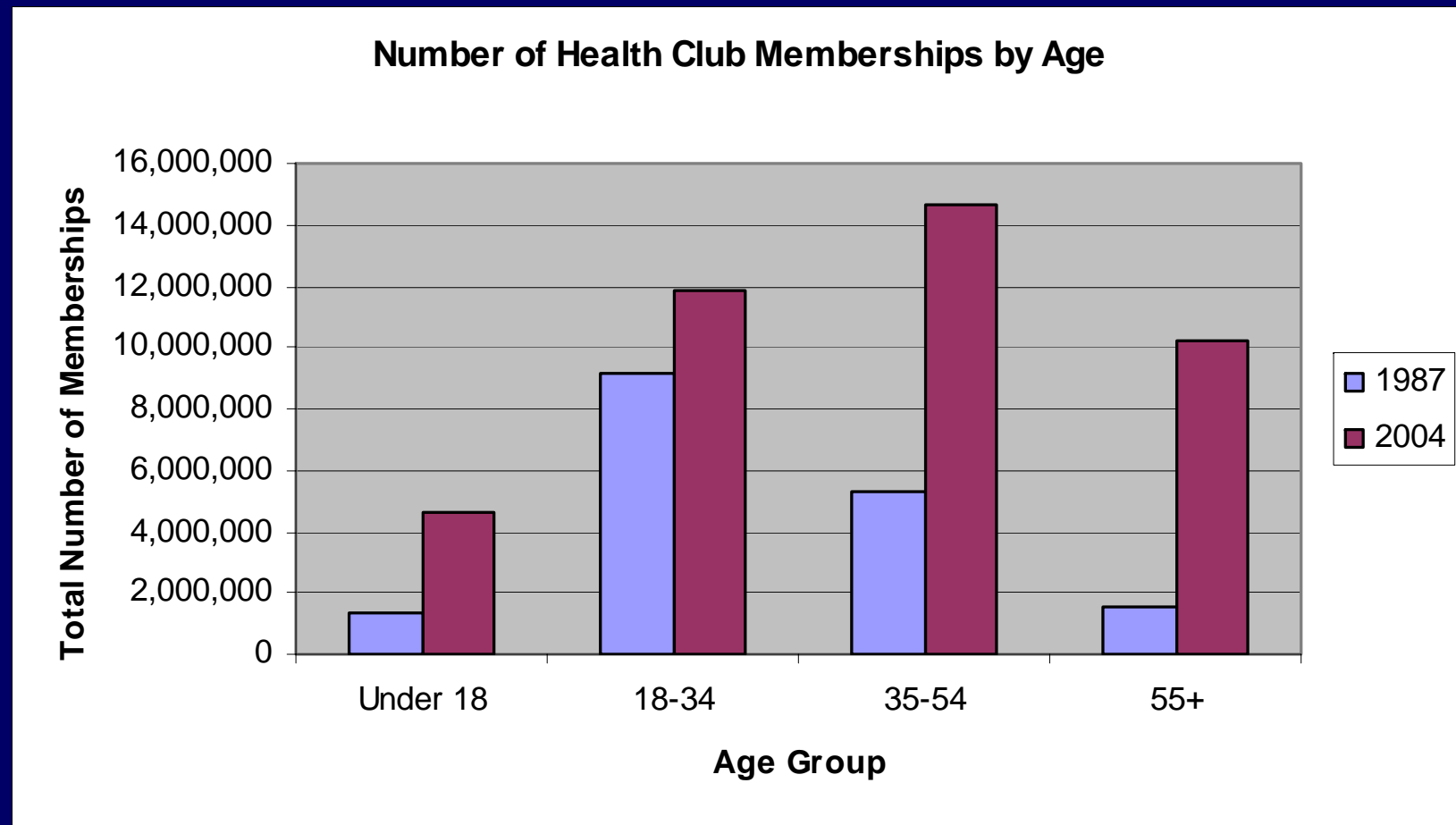
Sources: Behavioral Risk Factor Surveillance System, CDC.



Projecting Future Trends



Demographics



Projecting Future Trends



Demographics

Health club Membership by Age & Gender

Age	Males	Females
18 – 24 Years Old	15.9%	16.3%
25 – 34 Years Old	21.7%	16.6%
35 – 44 Years Old	15.5%	17.5%
45 – 54 Years Old	16.2%	20.4%
55 – 64 Years Old	16.6%	17.8%
65 + Years Old	15.6%	15.6%

2004



Projecting Future Trends



Demographics

Health club Membership by Income

Income	Membership Rate
Less than \$25,000	7.5%
\$25,000 to \$49,999	11.7%
\$50,000 to \$74,999	16.5%
\$75,000 to \$99,999	20.8%
\$100,000 & over	26.2%

2004



Projecting Future Trends



Demographics

Health club Membership by Education

Level Attained	Membership Rate
H.S. or Less	8.5%
Some College	17.2%
College	23.6%
Advanced Degree	28.8%

2004



Projecting Future Trends



Cultural Shifts

- With Respect to Fitness, We are a Bifurcated Society
- People are Less Tolerant of Compromised Conditions
- Students are Absorbed and Insulated by Technology
- Family Incomes of College Students are Increasing Faster than the National Average



Projecting Future Trends



Educational Philosophies

- Harvard Task Force on General Education
 - Key finding: One week after a traditional lecture, the average student retains only 20% of the information presented.
 - Students must become more involved with the learning process.
- Harvard Announces “Activity-Based Learning Initiative”
 - Initiative proposed start with 2008 freshman class
 - Harvard has a history of setting trends for educational philosophy
- Goal: “Help students see how what they learn in class informs what they do outside of class and vice versa”



Projecting Future Trends



Educational Philosophies

■ Recreation Opportunity

- Student Involvement through employment
 - Quantity of jobs compares favorably with large academic departments
 - Range of jobs (fitness assessment, marketing, finance & accounting, recreation management, event planning, logistics, etc.)
- Student Involvement through traditional programming
- Student Involvement through wellness programming

■ Projected Institutional Response

- Increased ambition
- Broadened range of funding mechanisms & Approaches

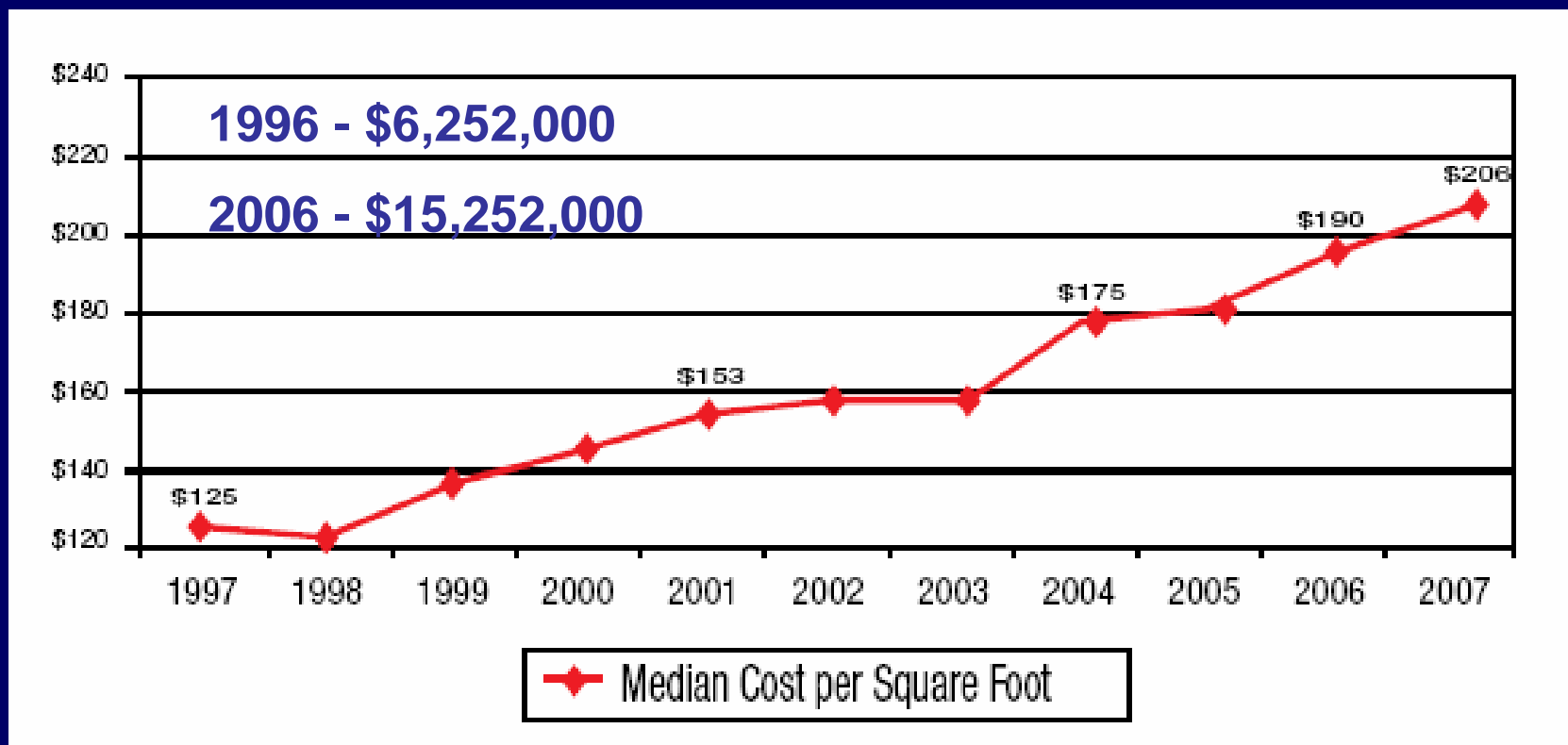


Projecting Future Trends



Economic Realities

- Cost of Construction

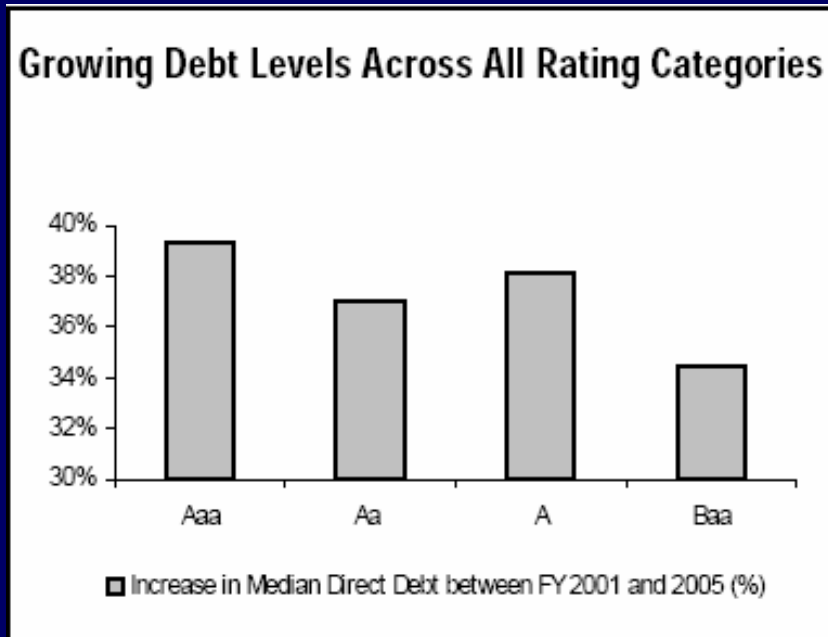


Projecting Future Trends



Economic Realities

■ Institutional Debt



- Higher Ed is Borrowing at Historic Rates
- Debt Capacity and Credit Quality are Being Eroded
- Protecting the Balance Sheet is Increasing in Importance for More Schools
- Off-balance sheet Approaches will be Sought for Anything with a Cash Flow



Projecting Future Trends



Economic Realities

■ Student Debt

➤ More Student are Borrowing

- Almost 65% of students at 4 year colleges had loans in 2005
- In 1993 Less Than Half Had Loans

➤ Student are Borrowing More

- Over the past decade, the average debt load for graduating seniors has more than doubled from \$9,250 to \$19,200
- Over the past five years, tuition and fees have increased 57%
- Averages debt varies widely by state and institution type



Projecting Future Trends



Economic Realities

- Student Debt

Only 10% of U.S. Born Doctoral Students Had Any Student Debt as an Undergraduate!



Projecting Future Trends



Economic Realities

- Growing Demand for a College Education has Supported the New Cost Structure
- Many Students Get Priced Out of the Market
 - Approximately, 400,000 college eligible High School Graduates cannot afford to attend a 4 year college
 - Of those, 173,000 do not attend any college at all
- The Average Household Income of a College Student is 160% of the National Average!



Projecting Future Trends



Public Policy

- Direct Student Support
 - Grant Funding
 - Loan Programs
 - Service Programs
- Institutional Level Support
 - Federal Construction Finance
 - Issue Specific Funding
 - Green Initiatives
 - Technology Initiatives
 - Other Initiatives



Projecting Future Trends



Recreation Trends >>> Cultural Shifts

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Contemporary Era

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Gender Balanced

All Ages Groups Are Active



Projecting Future Trends



Recreation Trends >>> Cultural Shifts

Contemporary Era

The Next Stage

Recreation / Social Focus		Experiential Learning Focus
Dynamic Social Space		The Living Lab
Maximized Appeal		Managed Participation
Special Purpose Buildings		Specialized Components
Market Driven Services		Multifaceted Operations
Fee Based Memberships		Workforce Wellness Focus
Gender Balanced		Female Dominated
All Ages Groups Are Active		Increased Activity Levels

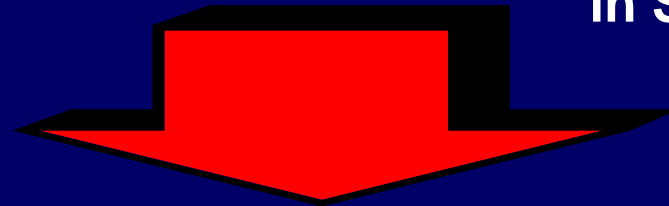


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