



City of Hilliard Community Center Study

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Section I Executive Summary

Background:

Ballard*King and Associates (B*K), along with ETC Leisure Vision (ETC) were hired to conduct a market analysis and feasibility study for a Community Center in Hilliard. The objective of this study was to determine the overall need for a Community Center and the feasibility of the project. Project tasks included a demographic assessment of the regional area, numerous stakeholder meeting, community-wide survey, review of existing recreation providers in the area, exploring potential partnerships, program recommendations, and operating pro-forma.

Market Analysis:

The Hilliard service area population is increasing at robust rate of 9.4% with the population projected to reach 41,729 people by the year 2025. The demographic profile of the community indicates an aging population. The age group distribution is somewhat mixed in this service area. There is a higher concentration of the 0-5, 5-17, 25-44, 45-54 and 55-64 age categories than the national level and lower concentration of in the 18-24, 65-74 and over 75 age categories than the national level. The median age of the primary service area is lower (1.2 years) than the than the national level of 38.5 years. Approximately 44.4% of households in the service area are households with children compared to a national level of 33.4%. The median household income is significantly higher (56.7%) than the national level of \$62,203. The number of households with income of \$50,000 or higher is 79% compared to a national level of 60%. A factor that must be considered is that the housing/dwelling expense in the service area is 32% higher than the national level. This suggests that the ratio between household income and housing expenses is above average. Age and household income are two determining factors that drive participation in sports, recreation and wellness activities. When factoring median age, household income and age distribution, the demographic profile suggests that the market conditions are favorable for supporting a community center.

Statistics from the National Sporting Goods Association (NSGA) were overlaid on to the demographic profile of the service areas to determine the market potential for various activities that could take place in an indoor facility. The market potential was measured against the existing inventory of recreation providers in the area and concluded that there is a shortage of swimming pools, gymnasium space and multi-purpose space, fitness space and classroom space in the service area. Additionally, there is a need to expand senior citizen space to the proposed community center as the existing center continues to age and does not meet the program needs.

Stakeholder Meetings:

A series of stakeholder meetings were conducted to gather input from potential user groups and partners regarding the Community Center. A wide variety of needs were expressed during these stakeholder meetings. Without question, an aquatic center was one of the most frequently heard components along with meeting room space, gymnasium, walking track, fitness, and dedicated art room which all received

strong support. A total of 34 different agencies and organizations participated in the stakeholder meetings including the following:

Senior Center	YMCA
Churches	Nemeth Counseling
Ohio State	Syntero
Hilliard Arts Council	Mount Carmel
City Parks and Recreation Staff	Colts
Hilliard Baseball	HGSA
NW Soccer Club	Hilliard Assistance Council
Optimist Sports	St Brendan's
Girls Softball	Equity
Marlin's Swim Team	Credit Union of Ohio
HOSA Soccer	Coffee Connections
Chamber of Commerce	Advanced Drainage Systems
Food Pantry	Dogwatch
Kiwanis Club	Hilliard Graeters
Security Plus Insurance	Crooked Can
Hilliard City SD	Brown Township
Norwich Township	Darby Athletics

Programming:

The program recommendations for the Community Center were driven by the information gathered during the market analysis, including the demographic profile of the community, statistical data from the National Sporting Goods Association, stakeholder input, competitive analysis of other recreation and sport facilities in the area, and community-wide survey. During the program phase of the study, different options were explored before developing a final recommendation. Based on the market analysis, program assessment and budgetary considerations the following program summary is possible for the Community Center.

Component	Sq. Ft. Size
Gymnasium	18,000
Auxiliary Gym	5,000
Fitness Space	6,000
Group Exercise	2,000
Dedicated Senior Center	4,000
Class Rooms	1,200
Multi-Purpose Room	3,500
Indoor Playground	3,000
Child Watch	2,500
Aquatic Center	18,000
Retail Space	6,000
Resource Center	300
Art Room	3,000
Maker Space	1,000
Support Spaces	12,500
Sub-Total	85,500
Circulation (18%)	15,000
Total	100,500

Operations:

An operation analysis was conducted to examine operational costs and revenues for the Community Center. The operating pro-forma developed represents a conservative approach to estimating expenses and revenues and was completed based on the best information available and a basic understanding of the current area operations.

The results of the operations analysis indicate that the proposed expansion of the Center will not recover 100% of its operating costs through revenue. The operating pro-forma does not include debt service since the funding for this project is yet to be determined. A center with a multi-court gymnasium, warm water leisure pool with zero depth entry and play features, lap pool, multi-purpose room, walking/jogging track, fitness center with cardiovascular and weightlifting area, group exercise rooms, birthday party rooms, child watch area, dedicated senior space, community gather space, resources center, indoor play structure, maker space, dedicated class room space, support offices, administration area and lobby. The center is approximately 100,500 SF.

Expense – Revenue Comparison

Category	Facility Budget
Expense	\$ 2,526,977
Revenue	\$ 2,005,175
Difference	\$ (521,802)
Cost Recovery	79%

Conclusion:

The market conditions suggest support for the Community Center. The proposed facility, by virtue of the leisure pool, competition pool, multiple gymnasium space, fitness, indoor walking/jogging track, dedicated senior space, indoor play structure, birthday party rooms, dedicated art room, dedicated senior citizen space and community gathering spaces differentiate this facility from any other facility in the region. The Community Center is ideally positioned to not only improve the quality of the facilities in the area, but also to enhance the quality of life for residents while becoming an identifying landmark to the Hilliard.

Weekly participation in active recreation activities from area residents can be expected to be somewhere in the range of 10%-12% of the population which equals approximately 3,815-4,578 individuals, (based on 2020 population estimates for service area). This is a sufficient population base to rely on for the operation of a full-scale center. The success of similar facilities in other areas of the country suggests that these types of centers have been cost effective in meeting local sport and wellness needs.

Without question, a new Community Center will enhance the quality of life in the area while improving recreation and wellness opportunities. The proposed center fills the service gaps for a variety of recreation, swimming and expands the wellness access in the community for children, teenagers, families and seniors. A new facility will become a source of tremendous community pride and will bring the community together along with making the Hilliard more attractive for employers and employees alike. The center will also help establish and recognize the facility as a contributor to the economic health of the community by providing jobs, through the purchase of local goods and services and by generating tourism trade for the Hilliard area.

Section II – Market Assessment

Ballard*King & Associates (B*K) has contracted with the City of Hilliard to complete a market assessment for a community center. The first step to complete this scope of work is to determine service areas for analysis and recreation/leisure activities.

The following is a summary of the demographic characteristics within areas identified as Primary and Secondary Service Areas. The Primary Service Area is the boundaries of the city limits of Hilliard and the Secondary Service Area is the Hilliard School District.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2020-2025 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

Service Areas:

The information provided includes the basic demographics and data for the Primary and Secondary Service Area with comparison data for the State of Ohio and the United States.

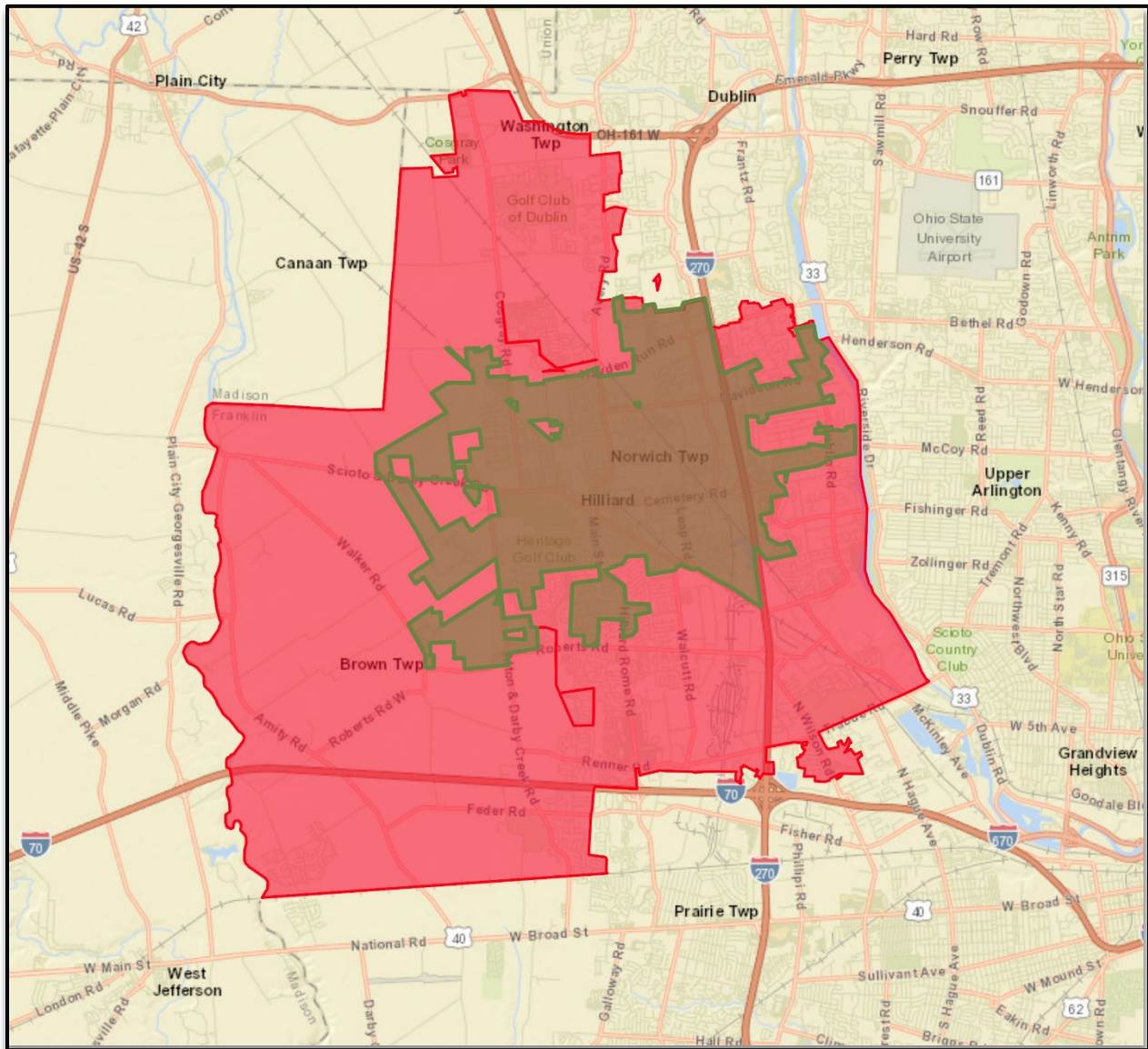
The Primary Service Areas are defined as the distance people will travel on a regular basis (a minimum of once a week) to utilize recreation facilities. Use by individuals outside of this area will be much more limited and will focus more on special activities or events.

Service areas can flex, or contract based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can influence participation, membership, daily admissions and the associated penetration rates for programs and services.

Service areas can vary in size with the types of components in the facility.



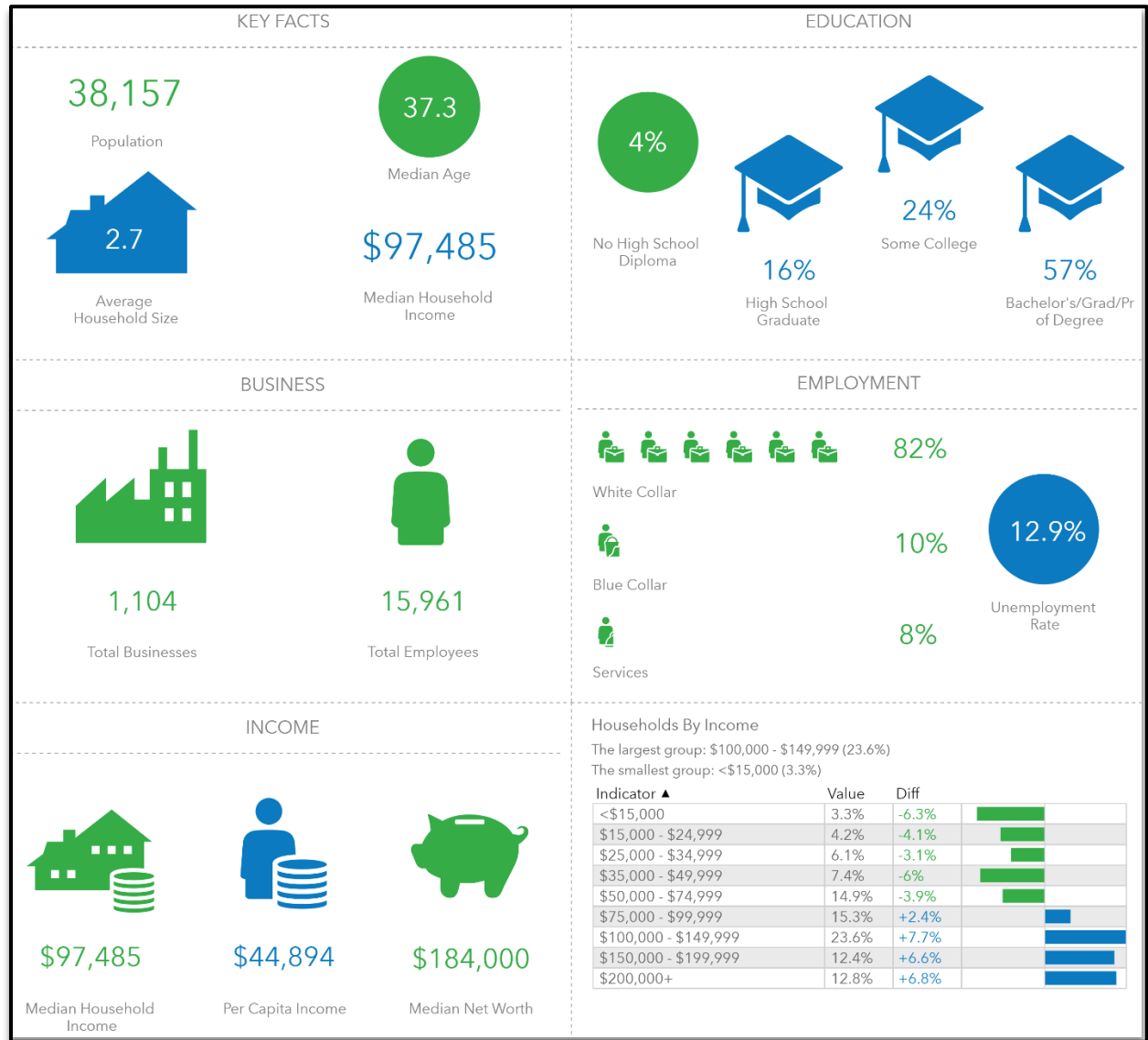
Map A – Service Area Maps



- Primary Service Area – Green Boundary – City of Hilliard
- Secondary Service Area – Red Boundary – Hilliard School District



Infographic



- Household by Income comparison uses the Primary Service Area and compares it to Franklin County.

Demographic Summary

	Primary Service Area	Secondary Service Area
Population:		
2010 Census	28,407 ¹	86,988 ²
2020 Estimate	38,157	105,575
2025 Estimate	41,729	113,921
Households:		
2010 Census	10,188	33,354
2020 Estimate	13,863	40,573
2025 Estimate	15,184	43,785
Families:		
2010 Census	7,608	22,593
2020 Estimate	9,931	26,932
2025 Estimate	10,846	28,911
Average Household Size:		
2010 Census	2.77	2.60
2020 Estimate	2.74	2.60
2025 Estimate	2.74	2.60
Ethnicity (2020 Estimate):		
Hispanic	3.6%	5.3%
White	81.5%	78.0%
Black	3.9%	5.5%
American Indian	0.2%	0.2%
Asian	10.6%	10.8%
Pacific Islander	0.0%	0.0%
Other	1.1%	2.4%
Multiple	2.7%	3.1%
Median Age:		
2010 Census	35.9	33.4
2020 Estimate	37.3	35.9
2025 Estimate	37.8	36.0
Median Income:		
2020 Estimate	\$97,485	\$89,664
2025 Estimate	\$103,051	\$96,791

¹ From the 2000-2010 Census, the Primary Service Area experienced a 15.5% increase in population.

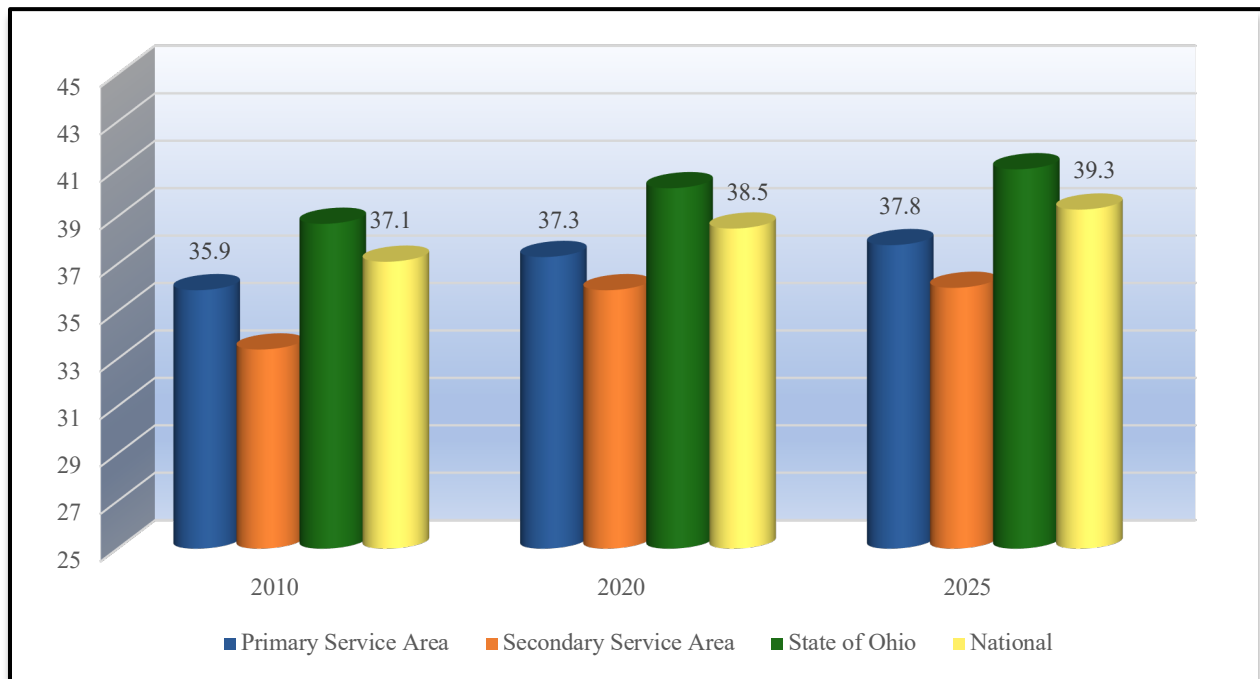
² From the 2000-2010 Census, the Secondary Service Area experienced a 21.8% increase in population.

Age and Income: The median age and household income levels are compared with the national number as both of these factors are secondary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

Table A – Median Age:

	2010 Census	2020 Projection	2025 Projection
Primary Service Area	35.9	37.3	37.8
Secondary Service Area	33.4	35.9	36.0
State of Ohio	38.7	40.2	41.0
Nationally	37.1	38.5	39.3

Chart A – Median Age:



The median age in the Service Areas are slightly lower than the State of Ohio and the National number. A lower median age typically points to the presence of families with children. Recreation Centers draw a large demographic but tend to be most popular with families. Grandparents are becoming an increasing part of the household though as they care for and are involved with their grandchildren.

The following chart provides the number of households and percentage of households in the Primary and Secondary Service Area with children.

Table B – Households w/ Children

	Number of Households w/ Children	Percentage of Households w/ Children
Primary Service Area	4,525	44.4%
Secondary Service Area	12,926	38.8%
State of Ohio	--	31.3%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2010 Census, 33.4% of households nationally had children present.



Map B – Median Age by Census Tract

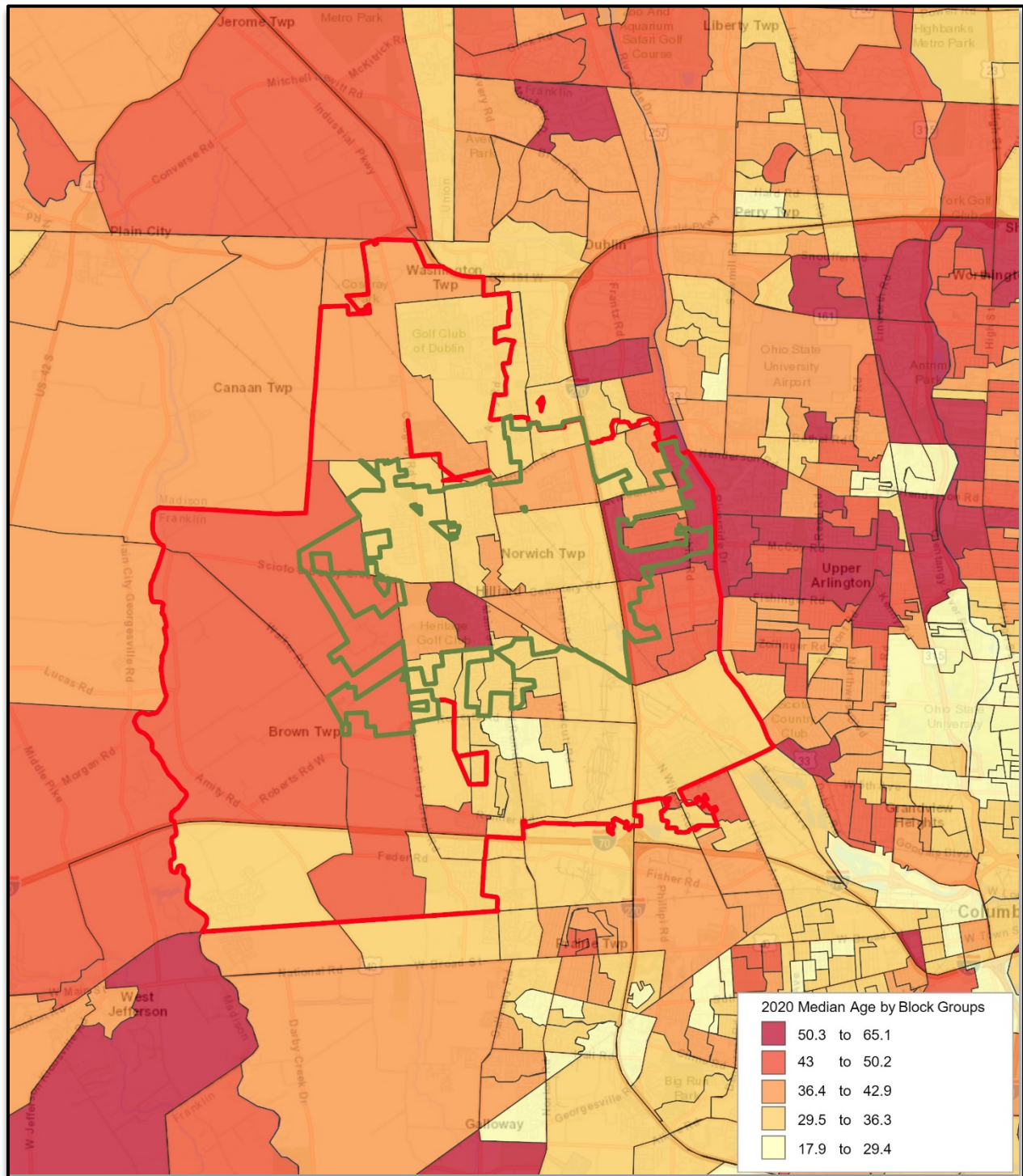
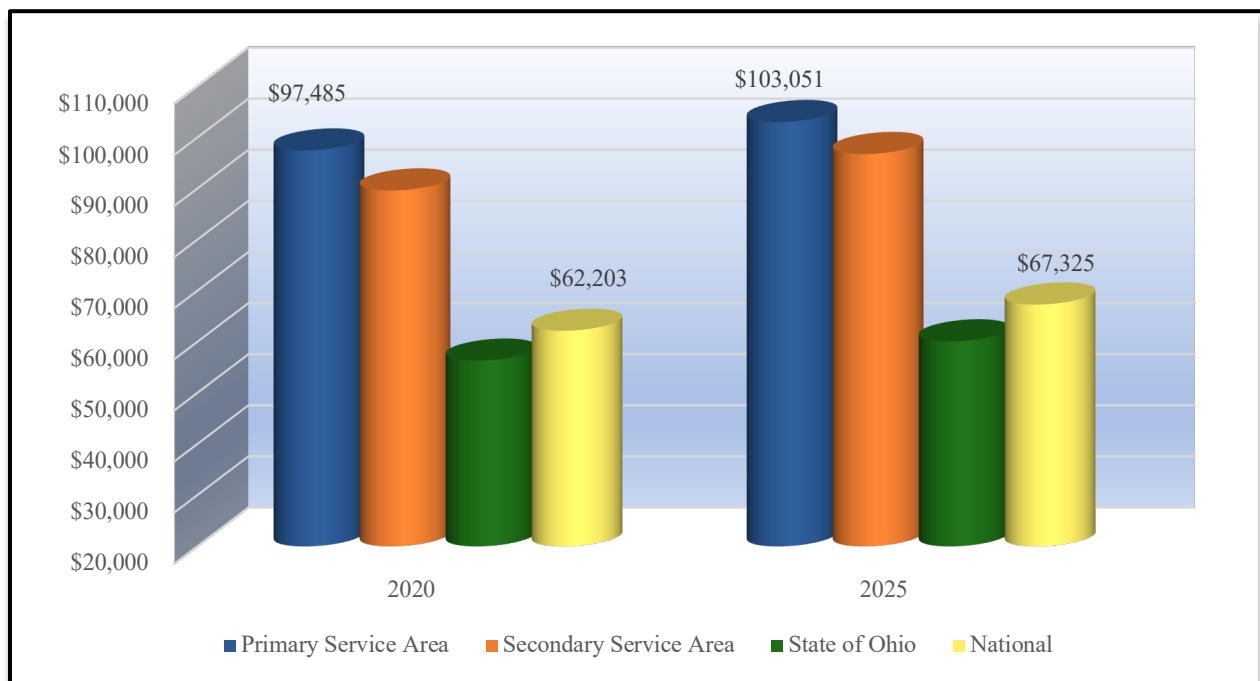


Table C – Median Household Income:

	2020 Projection	2025 Projection
Primary Service Area	\$97,485	\$103,051
Secondary Service Area	\$89,664	\$96,791
State of Ohio	\$56,352	\$60,126
Nationally	\$62,203	\$67,325

Chart B – Median Household Income:





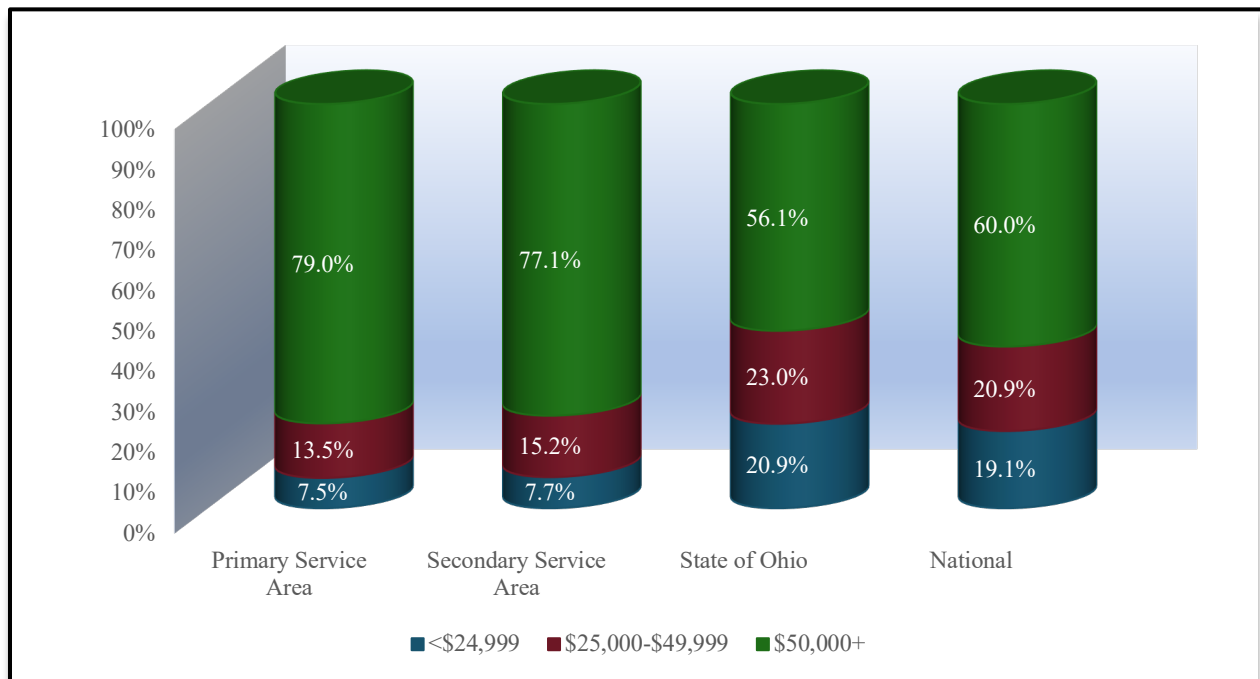
Based on 2020 projections for median household income the following narrative describes the service areas:

In the Primary Service Area, the percentage of households with median income over \$50,000 per year is 79.0% compared to 59.0% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 7.5% compared to a level of 14.3% nationally.

In the Secondary Service Area, the percentage of households with median income over \$50,000 per year is 77.1% compared to 59.0% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 7.7% compared to a level of 14.3% nationally.

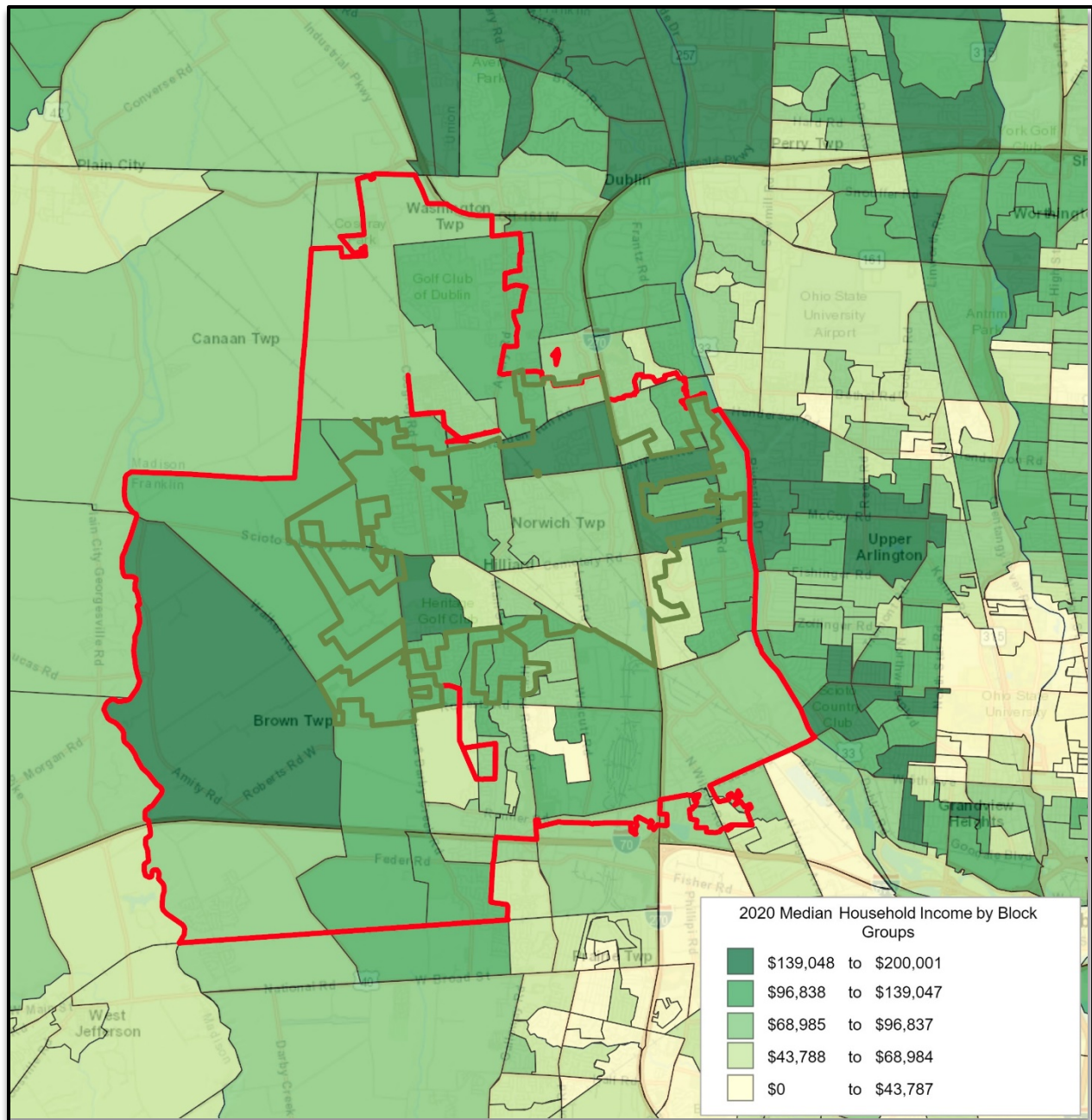
While there is no perfect indicator of use of an aquatic facility, the percentage of households with more than \$50,000 median income is a key indicator. Therefore, those numbers are significant and balanced with the overall cost of living.

Chart C – Median Household Income Distribution





Map C – Household Income by Census Tract



In addition to exploring the Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular, reviewing housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

Table D – Household Budget Expenditures³:

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	132	\$32,006.29	31.2%
<i>Shelter</i>	133	\$25,715.45	25.1%
<i>Utilities, Fuel, Public Service</i>	129	\$6,290.84	6.1%
Entertainment & Recreation	132	\$4,297.95	4.2%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	119	\$28,950.10	31.3%
<i>Shelter</i>	120	\$23,246.06	25.1%
<i>Utilities, Fuel, Public Service</i>	117	\$5,704.03	6.2%
Entertainment & Recreation	119	\$3,860.93	4.2%

State of Ohio	SPI	Average Amount Spent	Percent
Housing	85	\$20,735.04	30.9%
<i>Shelter</i>	84	\$16,309.46	24.3%
<i>Utilities, Fuel, Public Service</i>	91	\$4,425.58	6.6%
Entertainment & Recreation	89	\$2,886.44	4.3%

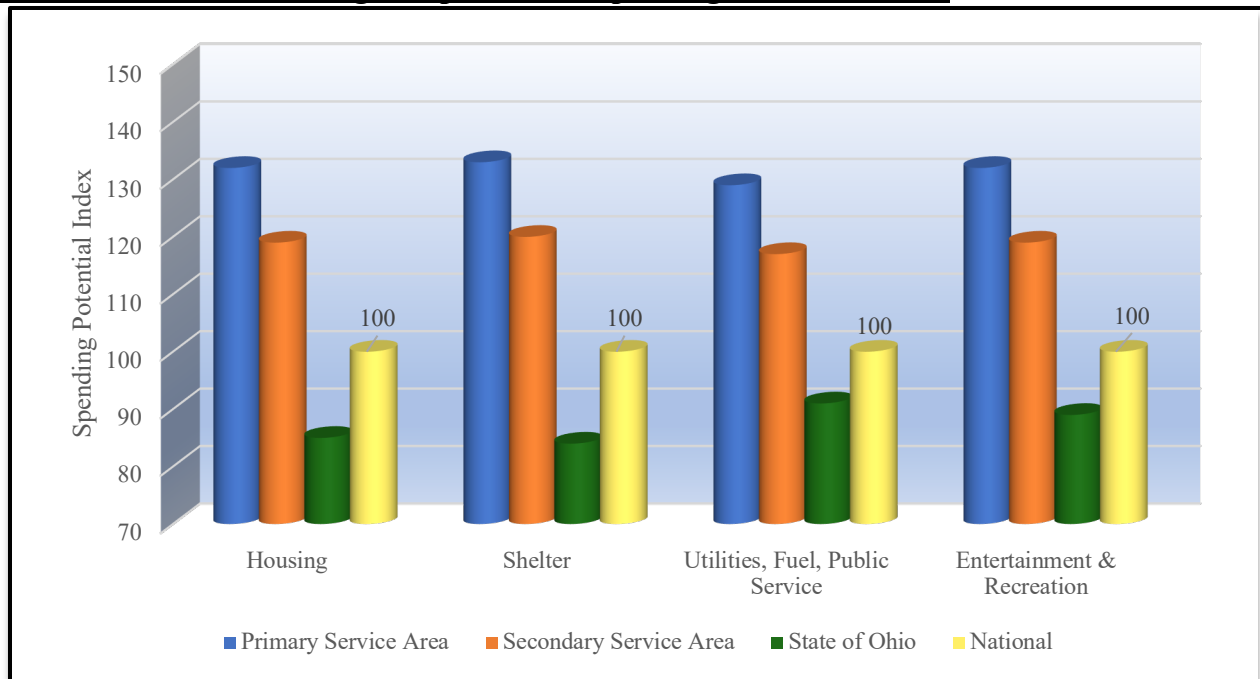
SPI: Spending Potential Index as compared to the National number of 100.
Average Amount Spent: The average amount spent per household.
Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

³ Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2020 and 2025.



Chart D – Household Budget Expenditures Spending Potential Index:



The consistency between the median household income and the household budget expenditures is important. It also points to the fact that compared to a National level the disposable income is greater in Hilliard than the national level. Household budget spending is 32% higher than the national level while the household income level is 56% higher than the national level. This could point to a greater capacity to pay for programs and services offered at a recreation facility of any variety.

The total number of housing units in the Primary Service Area is 10,618 and 96.0% are occupied, or 10,188 housing units. The total vacancy rate for the service area is 4.0%. Of the available units:

- For Rent 1.5%
- Rented, not Occupied 0.1%
- For Sale 1.3%
- Sold, not Occupied 0.2%
- For Seasonal Use 0.3%
- Other Vacant 0.7%

The total number of housing units in the Secondary Service Area is 35,162 and 94.9% are occupied, or 33,354 housing units. The total vacancy rate for the service area is 5.1%. Of the available units:

- For Rent 2.2%
- Rented, not Occupied 0.2%
- For Sale 1.4%
- Sold, not Occupied 0.2%
- For Seasonal Use 0.4%
- Other Vacant 0.7%

Recreation Expenditures Spending Potential Index: Finally, through the demographic provider that B*K utilizes for the market analysis portion of the report, we can examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

Table E – Recreation Expenditures Spending Potential Index⁴:

Primary Service Area	SPI	Average Spent per Person
Fees for Participant Sports	148	\$145.65
Fees for Recreational Lessons	144	\$208.74
Social, Recreation, Club Membership	139	\$331.91
Exercise Equipment/Game Tables	140	\$91.79
Other Sports Equipment	154	\$10.93

Secondary Service Area	SPI	Average Spent per Person
Fees for Participant Sports	133	\$130.75
Fees for Recreational Lessons	128	\$185.79
Social, Recreation, Club Membership	123	\$294.22
Exercise Equipment/Game Tables	124	\$81.51
Other Sports Equipment	141	\$10.00

State of Ohio	SPI	Average Spent per Person
Fees for Participant Sports	84	\$82.30
Fees for Recreational Lessons	78	\$112.41
Social, Recreation, Club Membership	83	\$199.82
Exercise Equipment/Game Tables	93	\$61.21
Other Sports Equipment	85	\$6.04

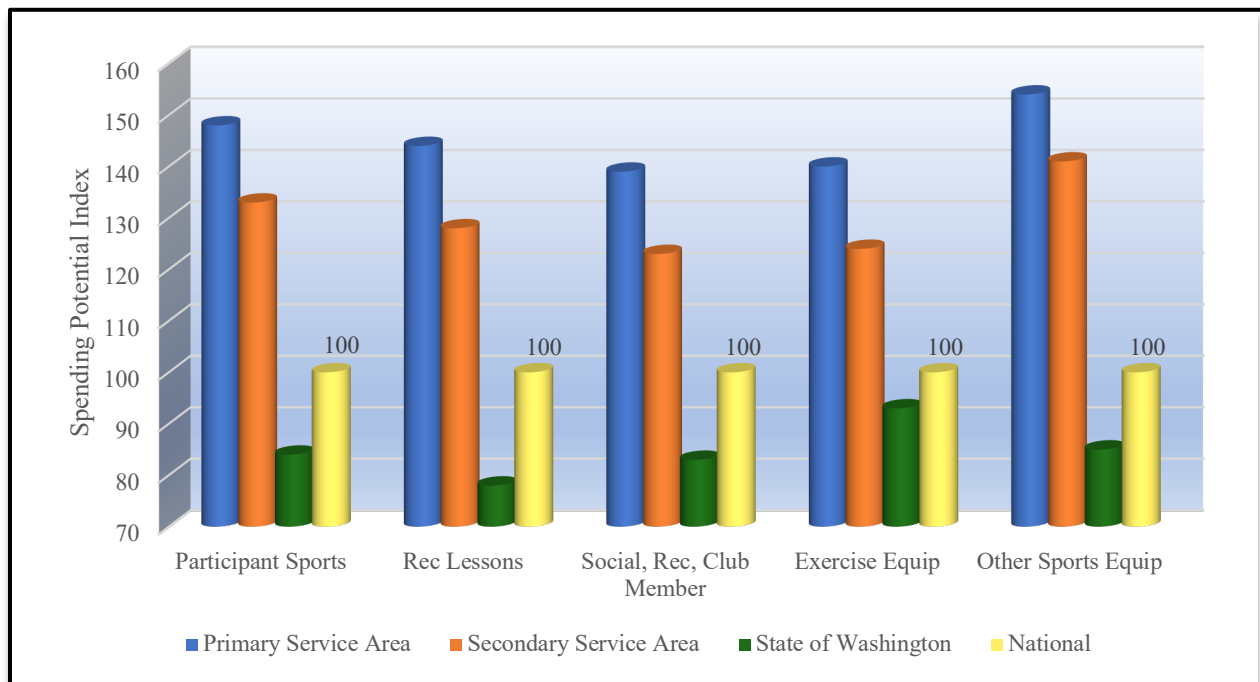
Average Amount Spent: The average amount spent per person for the service or item in a year.

SPI: Spending potential index as compared to the national number of 100.

⁴ Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.



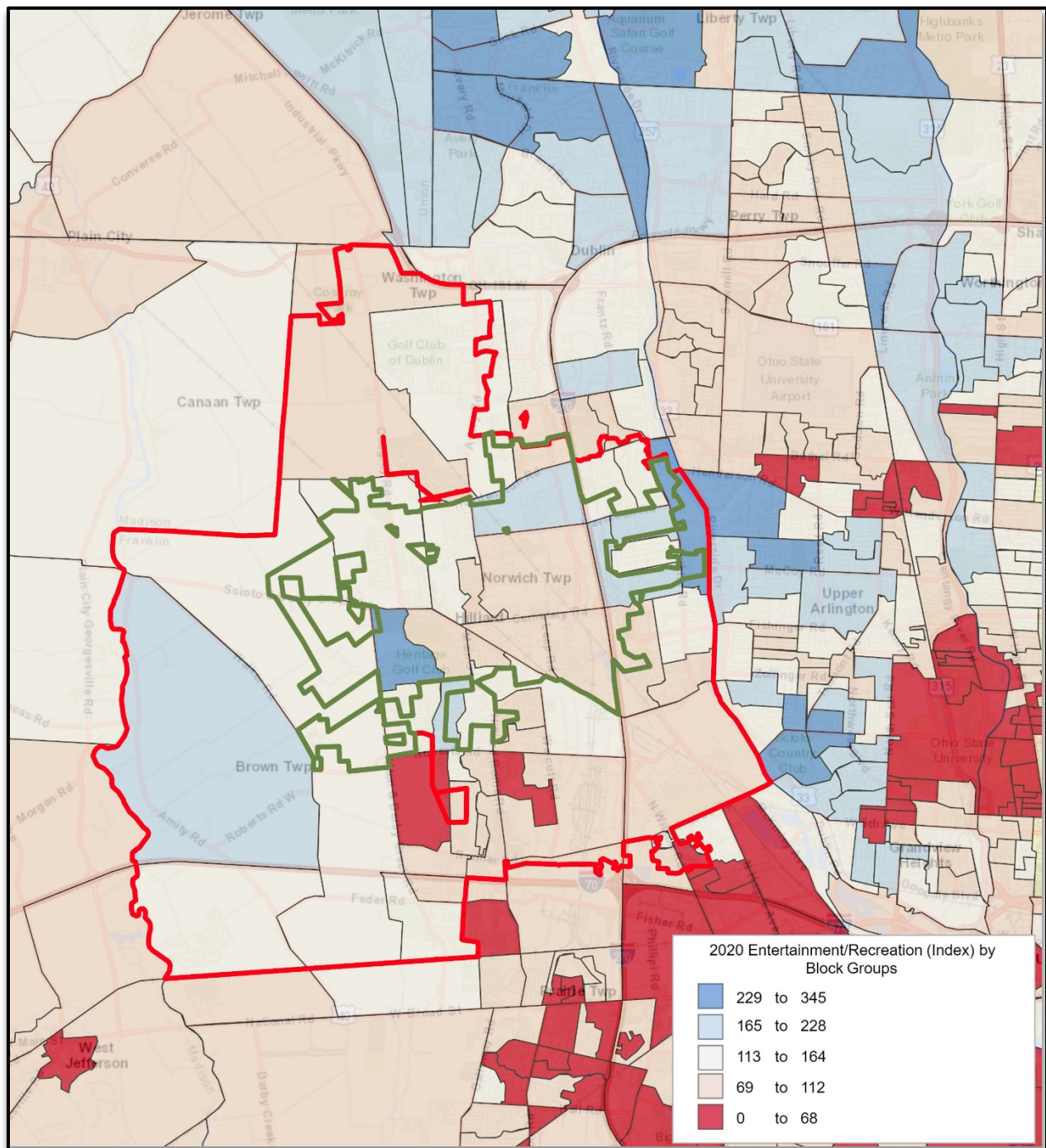
Chart E – Recreation Spending Potential Index:



Again, there is a great deal on consistency between median household income, household budget expenditures and now recreation and spending potential.



Map D – Recreation Spending Potential Index by Census Tract



Population Distribution by Age: Utilizing census information for the Primary and Secondary Service Area, the following comparisons are possible.

Table F – 2020 Primary Service Area Age Distribution

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	2,412	6.4%	6.0%	+0.4%
5-17	6,903	18.2%	16.0%	+2.2%
18-24	3,129	8.2%	9.4%	-1.2%
25-44	10,959	28.7%	26.6%	+2.1%
45-54	5,170	13.5%	12.4%	+1.1%
55-64	4,998	13.1%	13.0%	+0.1%
65-74	2,829	7.4%	9.8%	-2.4%
75+	1,760	4.6%	6.8%	-2.2%

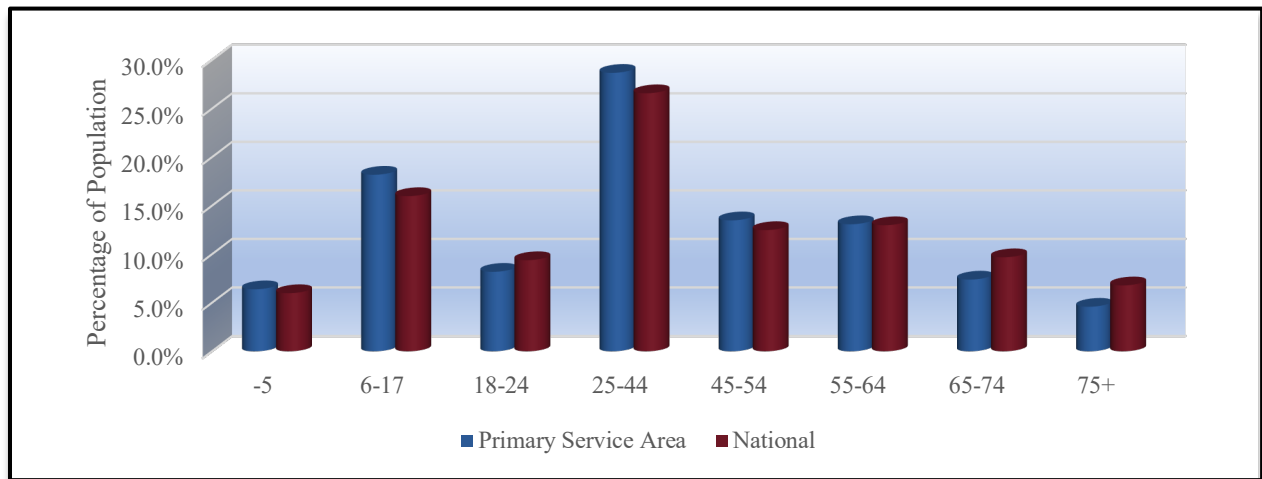
Population: 2020 census estimates in the different age groups in the Primary Service Area.

% of Total: Percentage of the Primary Service Area population in the age group.

National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the Primary Service Area population and the national population.

Chart F – 2020 Primary Service Area Age Group Distribution



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the under 6, 6-17, 25-44, 45-54, and 55-64 age groups. A smaller population in the younger age groups 18-24, 65-74 and 75+. The greatest positive variance is in the 6-17 age group with +2.2%, while the greatest negative variance is in the 65-74 age group with -2.4%.



Table G – 2020 Secondary Service Area Age Distribution

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	7,341	7.0%	6.0%	+1.0%
5-17	19,223	18.2%	16.0%	+2.2%
18-24	8,730	8.3%	9.4%	-1.1%
25-44	33,047	31.2%	26.6%	+4.6%
45-54	13,941	13.2%	12.4%	+0.8%
55-64	12,388	11.7%	13.0%	-1.3%
65-74	7,088	6.7%	9.8%	-3.1%
75+	3,817	3.6%	6.8%	-3.2%

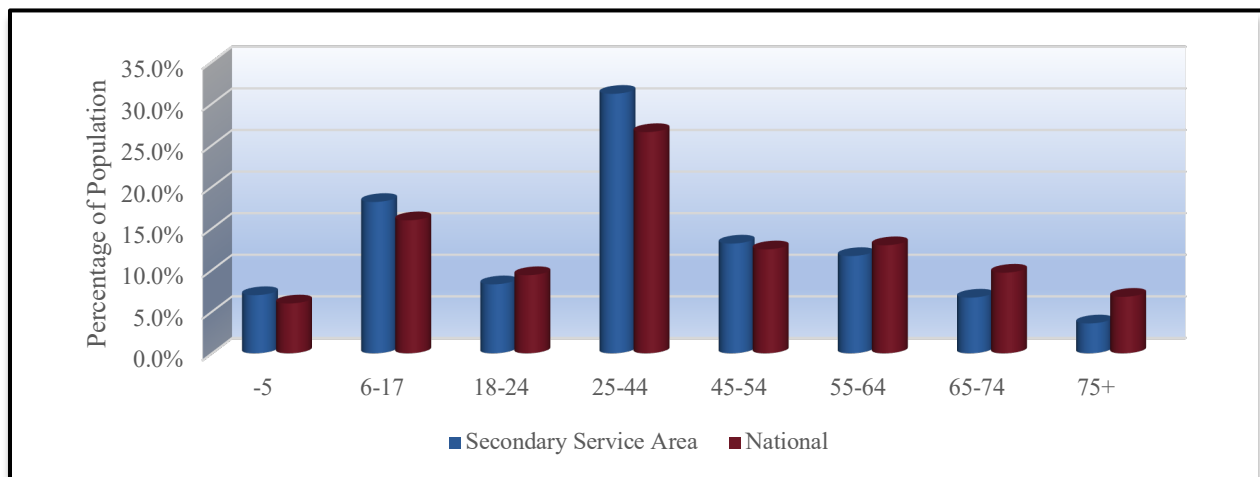
Population: 2020 census estimates in the different age groups in the Secondary Service Area.

% of Total: Percentage of the Secondary Service Area population in the age group.

National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the Secondary Service Area population and the national population.

Chart G – 2020 Secondary Service Area Age Group Distribution



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the age groups Under 5, 6-17, 25-44, and 45-54, . A smaller population in the 18-24, 55-64, 65-74 and 75+ age groups. The greatest positive variance is in the 25-44 age group with +4.6%, while the greatest negative variance is in the 75+ age group with -3.2%.

Population Distribution Comparison by Age: Utilizing census information from the Primary and Secondary Service Area, the following comparisons are possible.

Table H – 2020 Primary Service Area Population Estimates

(U.S. Census Information and ESRI)

Ages	2010 Census	2020 Projection	2025 Projection	Percent Change	Percent Change Nat'l
-5	1,982	2,412	2,616	+32.0%	+2.1%
5-17	6,565	6,903	7,124	+8.5%	+0.7%
18-24	1,803	3,129	3,086	+71.2%	+0.5%
25-44	8,130	10,959	12,330	+51.7%	+13.0%
45-54	4,813	5,170	5,290	+9.9%	-9.9%
55-64	2,657	4,998	5,106	+92.2%	+15.4%
65-74	1,272	2,829	3,785	+197.6%	+69.8%
75+	1,185	1,760	2,398	+102.4%	+50.2%

Chart H – Primary Service Area Population Growth

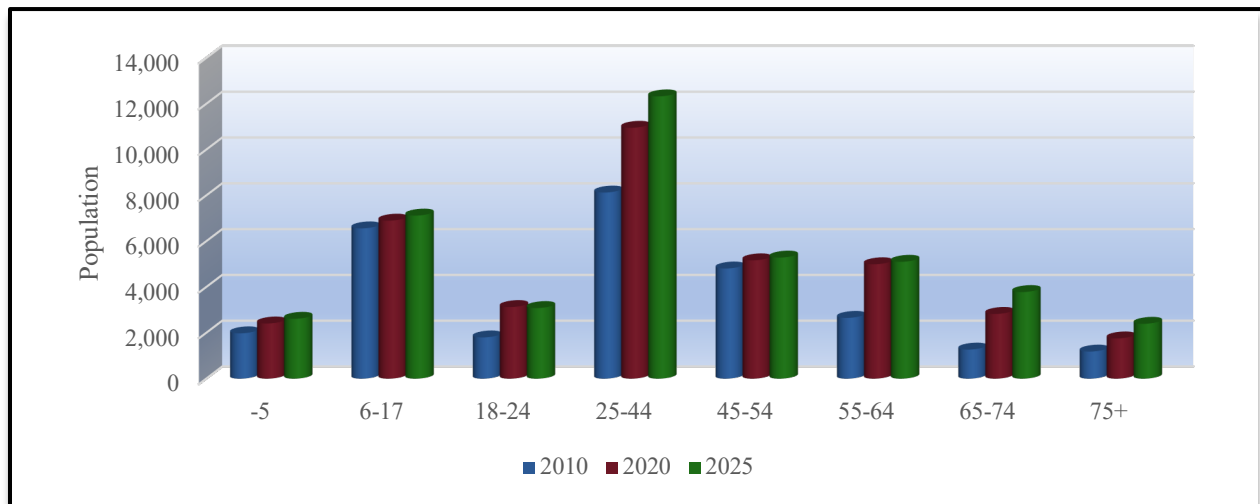


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2025. It is projected all age categories will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Table I – 2020 Secondary Service Area Population Estimates

(U.S. Census Information and ESRI)

Ages	2010 Census	2020 Projection	2025 Projection	Percent Change	Percent Change Nat'l
-5	6,949	7,341	7,916	+13.9%	+2.1%
5-17	17,077	19,223	19,998	+17.1%	+0.7%
18-24	6,383	8,730	9,348	+46.5%	+0.5%
25-44	29,692	33,047	35,273	+18.8%	+13.0%
45-54	13,058	13,941	14,698	+12.6%	-9.9%
55-64	7,973	12,388	12,472	+56.4%	+15.4%
65-74	3,372	7,088	8,974	+166.1%	+69.8%
75+	2,484	3,817	5,239	+110.9%	+50.2%

Chart I – Secondary Service Area Population Growth

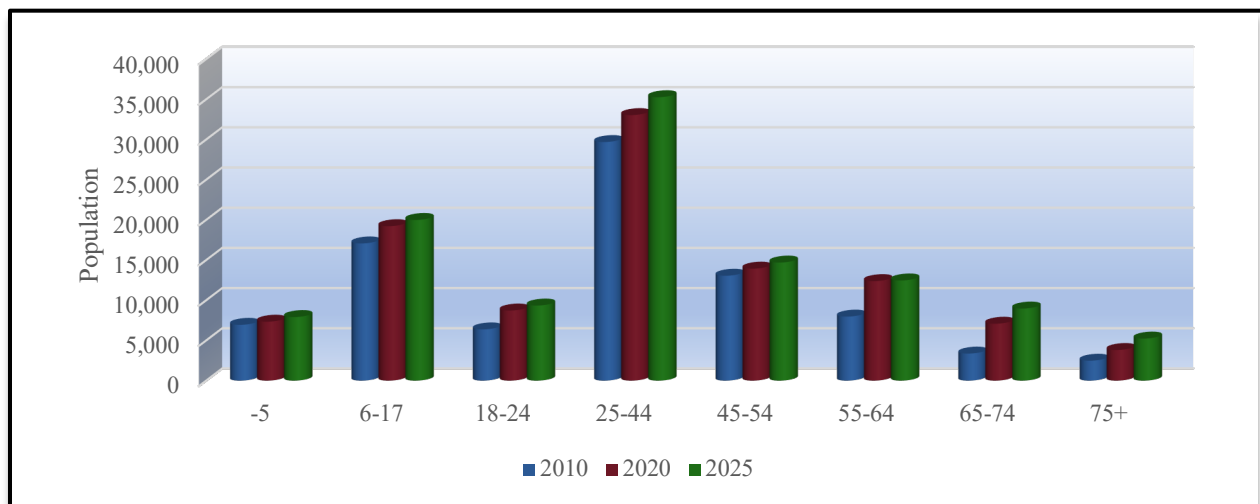


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2025. It is projected all age categories will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the Primary and Secondary Service Area for 2020 population projections. The U.S. Census defines Hispanic as an ethnicity require federal agencies to use a minimum of two ethnicities in collecting and reporting data. The Government defines Hispanic or Latino as a person from Cuba, Mexico, Puerto Rico, South or Central America. and should not be confused as a race. Those numbers were developed from 2020 Census Data.

Table J – Primary Service Area Ethnic Population and Median Age 2020

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of OH Population
Hispanic	1,359	24.9	3.6%	4.2%

Table K – Primary Service Area by Race and Median Age 2020

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of OH Population
White	31,083	39.3	81.5%	80.0%
Black	1,474	29.3	3.9%	12.9%
American Indian	61	34.2	0.2%	0.2%
Asian	4,051	33.9	10.6%	2.6%
Pacific Islander	9	16.3	0.0%	0.0%
Other	436	24.6	1.1%	1.5%
Multiple	1,046	16.6	2.7%	2.7%

2020 Primary Service Area Total Population:

38,157 Residents

Chart J – 2020 Primary Service Area Population by Non-White Race

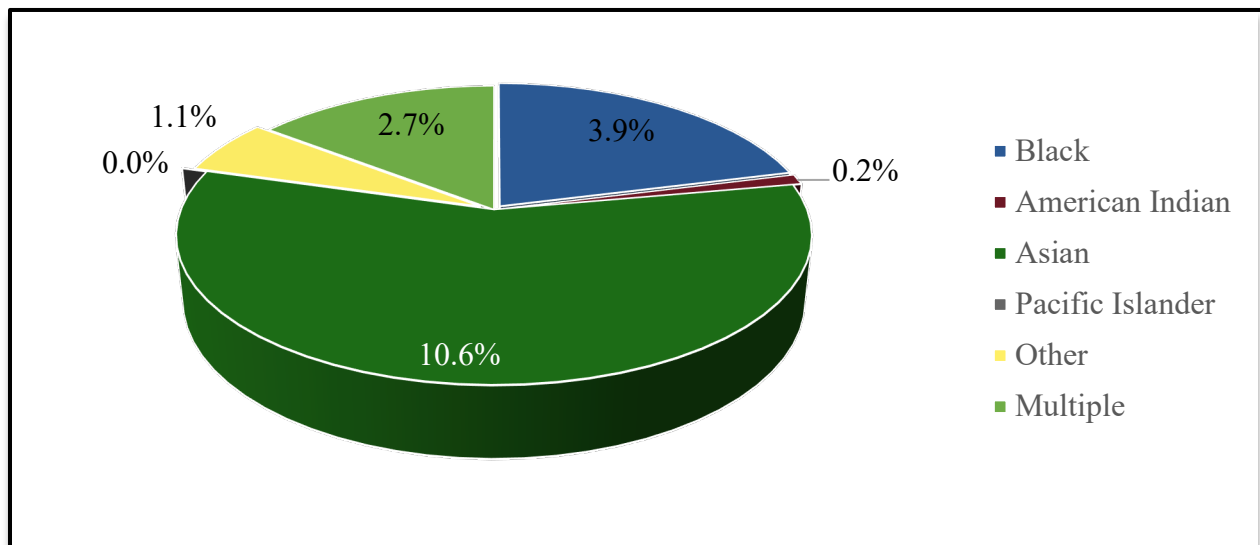


Table L – Secondary Service Area Ethnic Population and Median Age 2020

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of OH Population
Hispanic	5,597	24.7	5.3%	4.2%

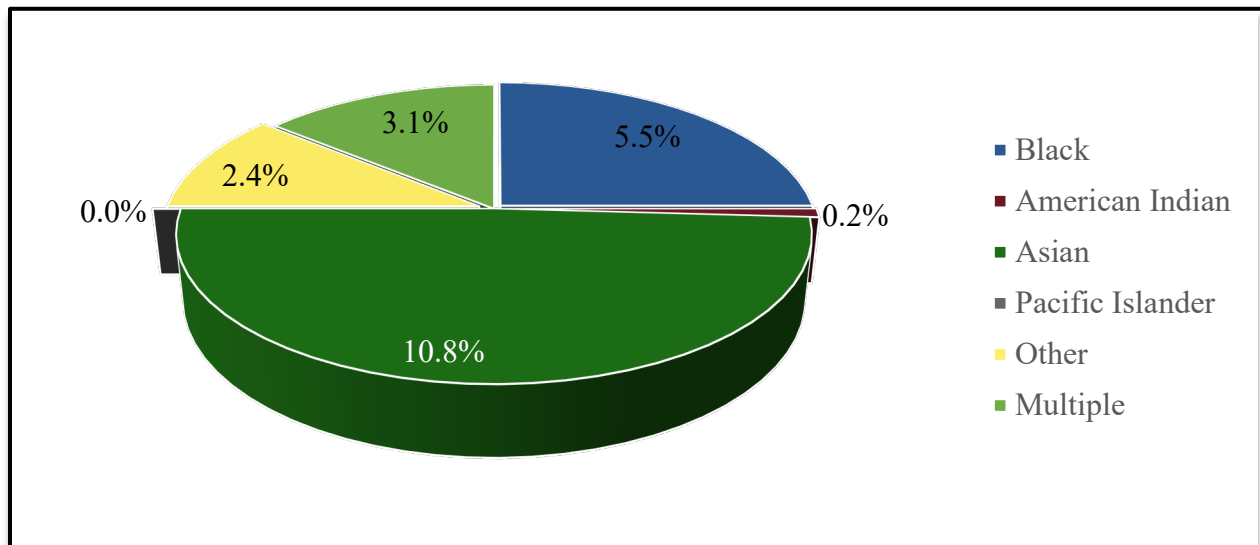
Table M – Secondary Service Area by Race and Median Age 2020

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of OH Population
White	82,370	37.7	78.0%	80.0%
Black	5,855	29.5	5.5%	12.9%
American Indian	172	36.6	0.2%	0.2%
Asian	11,400	34.4	10.8%	2.6%
Pacific Islander	41	21.2	0.0%	0.0%
Other	2,492	23.9	2.4%	1.5%
Multiple	3,247	16.6	3.1%	2.7%

2020 Secondary Service Area Total Population: 105,575 Residents

Chart K – 2020 Secondary Service Area Population by Non-White Race



Demographic Summary

- The population level of 38,157 people within the Primary Service Area is large enough to support an indoor recreation facility.
- The population is projected to grow at a robust level of over 9% over the next five years to a population level of 41,729.
- There is a higher percent of under 5, 6-17, 25-44, 45-54 and 55-64 age groups than the national age group distribution. This suggests more children and families in the primary service area than the national level. The percent of households with children in the primary service area is 44.4% compared to the national level of 33.4%. Age is one determining factor that drives participation in recreation and sport activities.
- There is a higher percentage of growth projected across the entire age spectrum than the national level. Of particular note is the expected growth in the 25-44 age category of 51.7% over the 2010 level population in the same category. This is significant because this is the age group that has a direct correlation to the younger age categories and indicates future growth in the younger age groups. It is also significant because the national growth in this age category is 13% over the same time period.
- Although there is strong presence of families in the Primary Service Area it should be noted that the age group estimated to grow the most by 2025 is the over 55 age groups. The 55-64 age group will grow 92.2% (76.8% higher than the national level), the 65-74 age group will grow 197.6% (127.8% higher than the national level) and the over 75 age group will grow 102.4% (52.2% higher than the national level) are all significantly higher than the national level. This growth will impact the demand for senior programming in the near future.
- The median household income of \$97,485 within the Primary Service Area is significantly higher (56.7%) than the national level. Comparatively, the percent of households with income over \$50,000 is 79% compared to a national level of 60%. Household income is another one of the primary determining factor that drives participation recreation and sports.
- The Spending Potential Index for housing in the primary service area is 32% higher than the national level. Comparing the housing expenditure level (32% higher) to the median household income (56.7% higher) indicates a sufficient level of discretionary income in the Primary Service Area to support participation in recreation and leisure activities.
- The Tapestry segments identified in the Primary Service Area point to an active community, which is also supported by the volume of other service providers in the area.
- The median age of Primary Service is lower than the National number.

Market Potential Index for Adult Participation: In addition to examining the participation numbers for various activities through the National Sporting Goods Association, 2019 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in various that could take place in an indoor setting. Please note that the information from the NSGA is limited to only the activities listed below.

Table P – Market Potential Index (MPI) for Participation in Activities in Primary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobics	2,408	8.3%	119
Baseball	1,330	4.6%	115
Basketball	2,673	9.3%	118
Bicycle Riding	3,271	11.3%	123
Exercise Walking	7,668	26.6%	112
Football	1,442	5.0%	107
Golf	2,944	10.2%	128
Figure/Ice Skating	848	2.9%	104
Pilates	909	3.2%	123
Running/Jogging	4,579	15.9%	130
Soccer	1,351	4.7%	111
Softball	888	3.1%	108
Swimming	5,378	18.6%	122
Tennis	1,221	4.2%	118
Volleyball	1,229	4.3%	126
Weight Lifting	3,913	13.6%	132
Yoga	2,910	10.1%	122

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Primary Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

Table Q – Market Potential Index (MPI) for Participation in Activities in Secondary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobics	6,601	8.4%	119
Baseball	3,675	4.7%	116
Basketball	7,314	9.3%	118
Bicycle Riding	8,705	11.0%	119
Exercise Walking	20,694	26.2%	110
Football	4,011	5.1%	109
Golf	7,650	9.7%	121
Figure/Ice Skating	2,515	3.2%	113
Pilates	2,211	2.8%	110
Running/Jogging	12,727	16.1%	132
Soccer	3,651	4.6%	110
Softball	2,450	3.1%	109
Swimming	14,443	18.3%	119
Tennis	3,164	4.0%	112
Volleyball	3,258	4.1%	122
Weight Lifting	10,434	13.2%	129
Yoga	7,705	9.8%	118

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Secondary Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in activities is greater than the national number of 100. In many cases when a participation number is lower than the National number, primary factors include a lack of facilities or an inability to pay for services and programs.

Section III –Participation, Trends & Providers

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sport activities.

Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto the Service Areas to determine market potential. The information contained in this section of the report, utilizes the NSGA's most recent survey. For that data was collected in 2019 and the report was issued in June of 2020.

B*K takes the national average and combines that with participation percentages of the Service Area based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage when applied to the population of the Service Area then provides an idea of the market potential for outdoor recreation.

Table A –Participation Rates in the Primary Service Area

	Age	Income	Region	Nation	Average
Aerobics	15.8%	16.5%	16.9%	15.8%	16.3%
Baseball	4.4%	4.5%	5.4%	4.1%	4.6%
Basketball	8.8%	9.9%	8.2%	8.4%	8.8%
Bicycle Riding	13.0%	13.2%	14.0%	12.6%	13.2%
Billiards/Pool	7.0%	6.5%	7.7%	6.9%	7.0%
Cheerleading	1.3%	1.4%	1.4%	1.2%	1.3%
Exercise Walking	34.8%	35.7%	38.1%	35.6%	36.0%
Exercise w/ Equipment	19.3%	20.2%	18.8%	19.5%	19.4%
Football (flag)	2.3%	1.9%	1.6%	2.2%	2.0%
Football (tackle)	2.6%	3.5%	2.5%	2.4%	2.7%
Football (touch)	3.1%	2.3%	3.3%	3.0%	2.9%
Golf	5.9%	7.4%	7.3%	6.0%	6.7%
Hockey (ice)	1.1%	1.3%	0.9%	1.1%	1.1%
Ice/Figure Skating	3.6%	3.4%	3.1%	2.9%	3.2%
Lacrosse	1.0%	0.9%	1.9%	0.9%	1.2%
Martial Arts/MMA	2.1%	2.6%	1.2%	2.0%	2.0%
Pickleball	7.6%	1.2%	0.6%	0.7%	2.5%
Pilates	2.0%	1.9%	1.5%	2.0%	1.8%
Running/Jogging	15.8%	15.2%	14.0%	15.4%	15.1%
Soccer	5.0%	5.8%	3.8%	4.7%	4.8%
Softball	3.6%	3.9%	4.5%	3.4%	3.8%
Swimming	16.3%	16.7%	14.9%	16.1%	16.0%
Table Tennis/Ping Pong	3.4%	3.6%	4.0%	3.3%	3.6%
Tennis	4.2%	4.2%	4.0%	4.1%	4.1%
Volleyball	3.7%	3.3%	4.2%	3.5%	3.7%
Weight Lifting	12.7%	12.4%	12.1%	12.6%	12.4%
Workout @ Clubs	13.1%	13.6%	12.2%	13.2%	13.0%
Wrestling	1.2%	1.4%	1.2%	1.1%	1.2%
Yoga	10.8%	10.4%	11.4%	10.6%	10.8%
Did Not Participate	22.4%	19.7%	24.3%	22.4%	22.2%

Age: Participation based on individuals ages 7 & Up of the Primary Service Area.
Income: Participation based on the 2020 estimated median household income in the Primary Service Area.
Region: Participation based on regional statistics (East North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Table B –Participation Rates in the Secondary Service Area

	Age	Income	Region	Nation	Average
Aerobics	15.9%	16.5%	16.9%	15.8%	16.3%
Baseball	4.5%	4.5%	5.4%	4.1%	4.6%
Basketball	9.1%	9.9%	8.2%	8.4%	8.9%
Bicycle Riding	13.0%	13.2%	14.0%	12.6%	13.2%
Billiards/Pool	7.1%	6.5%	7.7%	6.9%	7.1%
Cheerleading	1.3%	1.4%	1.4%	1.2%	1.3%
Exercise Walking	34.2%	35.7%	38.1%	35.6%	35.9%
Exercise w/ Equipment	19.2%	20.2%	18.8%	19.5%	19.4%
Football (flag)	2.4%	1.9%	1.6%	2.2%	2.0%
Football (tackle)	2.7%	3.5%	2.5%	2.4%	2.8%
Football (touch)	3.3%	2.3%	3.3%	3.0%	3.0%
Golf	5.9%	7.4%	7.3%	6.0%	6.6%
Hockey (ice)	1.2%	1.3%	0.9%	1.1%	1.1%
Ice/Figure Skating	3.6%	3.4%	3.1%	2.9%	3.2%
Lacrosse	1.0%	0.9%	1.9%	0.9%	1.2%
Martial Arts/MMA	2.2%	2.6%	1.2%	2.0%	2.0%
Pickleball	7.6%	1.2%	0.6%	0.7%	2.5%
Pilates	2.0%	1.9%	1.5%	2.0%	1.9%
Running/Jogging	16.3%	15.2%	14.0%	15.4%	15.2%
Soccer	5.2%	5.8%	3.8%	4.7%	4.9%
Softball	3.6%	3.9%	4.5%	3.4%	3.9%
Swimming	16.3%	16.7%	14.9%	16.1%	16.0%
Table Tennis/Ping Pong	3.4%	3.6%	4.0%	3.3%	3.6%
Tennis	4.3%	4.2%	4.0%	4.1%	4.1%
Volleyball	3.8%	3.3%	4.2%	3.5%	3.7%
Weight Lifting	12.9%	12.4%	12.1%	12.6%	12.5%
Workout @ Clubs	13.2%	13.6%	12.2%	13.2%	13.1%
Wrestling	1.2%	1.4%	1.2%	1.1%	1.2%
Yoga	11.0%	10.4%	11.4%	10.6%	10.8%
Did Not Participate	22.2%	19.7%	24.3%	22.4%	22.2%

Age: Participation based on individuals ages 7 & Up of the Secondary Service Area.
Income: Participation based on the 2020 estimated median household income in the Secondary Service Area.
Region: Participation based on regional statistics (East North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-A & B above plus the 2010 census information and census estimates for 2020 and 2025 (over age 7) the following comparisons are available.

Table C –Participation Growth or Decline for Indoor Activities in Primary Service Area

	Average	2010 Population	2020 Population	2025 Population	Difference
Aerobics	16.3%	4,151	5,640	6,181	2,030
Baseball	4.6%	1,172	1,592	1,745	573
Basketball	8.8%	2,254	3,063	3,357	1,102
Bicycle Riding	13.2%	3,368	4,577	5,016	1,648
Billiards/Pool	7.0%	1,794	2,438	2,672	878
Cheerleading	1.3%	339	461	505	166
Exercise Walking	36.0%	9,203	12,505	13,704	4,501
Exercise w/ Equipment	19.4%	4,964	6,746	7,393	2,428
Football (flag)	2.0%	511	695	761	250
Football (tackle)	2.7%	702	953	1,045	343
Football (touch)	2.9%	750	1,019	1,116	367
Golf	6.7%	1,700	2,310	2,531	831
Hockey (ice)	1.1%	284	386	423	139
Ice/Figure Skating	3.2%	828	1,125	1,233	405
Lacrosse	1.2%	298	405	444	146
Martial Arts/MMA	2.0%	505	687	753	247
Pickleball	2.5%	644	875	959	315
Pilates	1.8%	471	640	702	231
Running/Jogging	15.1%	3,858	5,242	5,744	1,887
Soccer	4.8%	1,234	1,676	1,837	603
Softball	3.8%	980	1,332	1,460	479
Swimming	16.0%	4,083	5,548	6,080	1,997
Table Tennis/Ping Pong	3.6%	911	1,237	1,356	445
Tennis	4.1%	1,052	1,430	1,567	515
Volleyball	3.7%	940	1,277	1,400	460
Weight Lifting	12.4%	3,178	4,319	4,733	1,555
Workout @ Clubs	13.0%	3,327	4,521	4,955	1,627
Wrestling	1.2%	312	423	464	152
Yoga	10.8%	2,755	3,743	4,102	1,347
Did Not Participate	22.2%	5,670	7,704	8,443	2,773

Table D –Participation Growth or Decline for Indoor Activities in Secondary Service Area

	Average	2010 Population	2020 Population	2025 Population	Difference
Aerobics	16.3%	12,593	15,505	16,752	4,159
Baseball	4.6%	3,579	4,407	4,761	1,182
Basketball	8.9%	6,889	8,482	9,164	2,275
Bicycle Riding	13.2%	10,209	12,570	13,581	3,372
Billiards/Pool	7.1%	5,462	6,725	7,266	1,804
Cheerleading	1.3%	1,034	1,273	1,376	342
Exercise Walking	35.9%	27,763	34,184	36,932	9,169
Exercise w/ Equipment	19.4%	15,021	18,495	19,982	4,961
Football (flag)	2.0%	1,563	1,924	2,079	516
Football (tackle)	2.8%	2,140	2,635	2,846	707
Football (touch)	3.0%	2,292	2,822	3,049	757
Golf	6.6%	5,137	6,325	6,834	1,697
Hockey (ice)	1.1%	867	1,068	1,154	286
Ice/Figure Skating	3.2%	2,511	3,092	3,340	829
Lacrosse	1.2%	907	1,116	1,206	299
Martial Arts/MMA	2.0%	1,545	1,903	2,056	510
Pickleball	2.5%	1,956	2,409	2,602	646
Pilates	1.9%	1,435	1,767	1,909	474
Running/Jogging	15.2%	11,780	14,505	15,671	3,891
Soccer	4.9%	3,769	4,641	5,014	1,245
Softball	3.9%	2,984	3,674	3,970	986
Swimming	16.0%	12,369	15,230	16,455	4,085
Table Tennis/Ping Pong	3.6%	2,770	3,411	3,685	915
Tennis	4.1%	3,204	3,945	4,262	1,058
Volleyball	3.7%	2,868	3,532	3,816	947
Weight Lifting	12.5%	9,660	11,894	12,850	3,190
Workout @ Clubs	13.1%	10,100	12,436	13,435	3,336
Wrestling	1.2%	951	1,171	1,265	314
Yoga	10.8%	8,392	10,332	11,163	2,771
Did Not Participate	22.2%	17,135	21,099	22,794	5,659

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The “Did Not Participate” statistics refers to all 57 activities outlined in the NSGA 2019 Survey Instrument.

Participation by Ethnicity and Race: The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2019 survey, the following comparisons are possible. The green highlighted shading indicates a higher percentage than the national level and reddish shading is lower.

Table E – Comparison of National, African American and Hispanic Participation Rates

Indoor Activity	Primary Service Area	National Participation	African American Participation	Hispanic Participation
Aerobics	16.3%	15.8%	13.1%	17.8%
Baseball	4.6%	4.1%	2.3%	4.8%
Basketball	8.8%	8.4%	11.6%	9.5%
Bicycle Riding	13.2%	12.6%	6.9%	13.0%
Billiards/Pool	7.0%	6.9%	5.0%	5.5%
Cheerleading	1.3%	1.2%	2.2%	1.2%
Exercise Walking	36.0%	35.6%	28.7%	32.4%
Exercise w/ Equipment	19.4%	19.5%	17.4%	20.3%
Football (flag)	2.0%	2.2%	3.9%	2.8%
Football (tackle)	2.7%	2.4%	2.0%	3.0%
Football (touch)	2.9%	3.0%	2.9%	3.7%
Golf	6.7%	6.0%	2.6%	3.5%
Hockey (ice)	1.1%	1.1%	0.1%	1.4%
Ice/Figure Skating	3.2%	2.9%	1.1%	3.5%
Lacrosse	1.2%	0.9%	0.4%	1.3%
Martial Arts/MMA	2.0%	2.0%	1.0%	2.1%
Pickleball	2.5%	0.7%	0.2%	0.4%
Pilates	1.8%	2.0%	1.6%	2.5%
Running/Jogging	15.1%	15.4%	12.0%	17.8%
Soccer	4.8%	4.7%	2.2%	8.0%
Softball	3.8%	3.4%	3.4%	3.6%
Swimming	16.0%	16.1%	8.8%	15.1%
Table Tennis/Ping Pong	3.6%	3.3%	2.3%	2.2%
Tennis	4.1%	4.1%	3.3%	3.7%
Volleyball	3.7%	3.5%	3.1%	3.6%
Weight Lifting	12.4%	12.6%	9.9%	13.2%
Workout @ Clubs	13.0%	13.2%	11.6%	14.3%
Wrestling	1.2%	1.1%	1.3%	1.2%
Yoga	10.8%	10.6%	9.0%	12.4%
Did Not Participate	22.2%	22.4%	24.9%	25.3%

Primary Service Part:

National Rate:

African American Rate:

Hispanic Rate:

The unique participation percentage developed for the Primary Service Area.

The national percentage of individuals who participate in the given activity.

The percentage of African-Americans who participate in the given activity.

The percentage of Hispanics who participate in the given activity.

Table F – Comparison of National, African American and Hispanic Participation Rates

Indoor Activity	Secondary Service Area	National Participation	African American Participation	Hispanic Participation
Aerobics	16.3%	15.8%	13.1%	17.8%
Baseball	4.6%	4.1%	2.3%	4.8%
Basketball	8.9%	8.4%	11.6%	9.5%
Bicycle Riding	13.2%	12.6%	6.9%	13.0%
Billiards/Pool	7.1%	6.9%	5.0%	5.5%
Cheerleading	1.3%	1.2%	2.2%	1.2%
Exercise Walking	35.9%	35.6%	28.7%	32.4%
Exercise w/ Equipment	19.4%	19.5%	17.4%	20.3%
Football (flag)	2.0%	2.2%	3.9%	2.8%
Football (tackle)	2.8%	2.4%	2.0%	3.0%
Football (touch)	3.0%	3.0%	2.9%	3.7%
Golf	6.6%	6.0%	2.6%	3.5%
Hockey (ice)	1.1%	1.1%	0.1%	1.4%
Ice/Figure Skating	3.2%	2.9%	1.1%	3.5%
Lacrosse	1.2%	0.9%	0.4%	1.3%
Martial Arts/MMA	2.0%	2.0%	1.0%	2.1%
Pickleball	2.5%	0.7%	0.2%	0.4%
Pilates	1.9%	2.0%	1.6%	2.5%
Running/Jogging	15.2%	15.4%	12.0%	17.8%
Soccer	4.9%	4.7%	2.2%	8.0%
Softball	3.9%	3.4%	3.4%	3.6%
Swimming	16.0%	16.1%	8.8%	15.1%
Table Tennis/Ping Pong	3.6%	3.3%	2.3%	2.2%
Tennis	4.1%	4.1%	3.3%	3.7%
Volleyball	3.7%	3.5%	3.1%	3.6%
Weight Lifting	12.5%	12.6%	9.9%	13.2%
Workout @ Clubs	13.1%	13.2%	11.6%	14.3%
Wrestling	1.2%	1.1%	1.3%	1.2%
Yoga	10.8%	10.6%	9.0%	12.4%
Did Not Participate	22.2%	22.4%	24.9%	25.3%

Primary Service Part:

National Rate:

African American Rate:

Hispanic Rate:

The unique participation percentage developed for the Secondary Service Area.

The national percentage of individuals who participate in the given activity.

The percentage of African-Americans who participate in the given activity.

The percentage of Hispanics who participate in the given activity.

National Summary of Sports Participation: The following chart summarizes participation for indoor activities utilizing information from the 2019 National Sporting Goods Association survey.

Table G – Sports Participation Summary

Sport	Nat'l Rank	Nat'l Participation (in millions)
Exercise Walking	1	106.5
Exercising w/ Equipment	2	58.3
Hiking	3	48.1
Swimming	4	48.0
Aerobic Exercising	5	47.4
Running/Jogging	6	46.0
Camping	7	40.7
Workout @ Club	8	39.6
Weight Lifting	9	37.8
Bicycle Riding	10	37.8
Yoga	12	31.8
Basketball	14	25.2
Billiards/Pool	15	20.7
Golf	17	17.9
Soccer	20	14.2
Baseball	22	12.2
Tennis	23	12.2
Volleyball	25	10.6
Softball	26	10.1
Table Tennis	27	9.9
Football (touch)	30	8.9
Football (tackle)	34	7.3
Football (flag)	35	6.5
Martial Arts MMA	37	6.0
Gymnastics	39	5.9
Pilates	40	5.9
Skateboarding	42	5.3
Cheerleading	48	3.7
Wrestling	50	3.3
Lacrosse	52	2.8
Pickleball	57	2.0

Nat'l Rank: Popularity of sport based on national survey.

Nat'l Participation: Population that participate in this sport on national survey.

National Participation by Age Group: Within the NSGA survey, participation is broken down by age groups. As such B*K can identify the top 3 age groups participating in the activities reflected in this report.

Chart H – Participation by Age Group:

Activity	Largest	Second Largest	Third Largest
Aerobics	35-44	25-34	45-54
Baseball	7-11	12-17	25-34
Basketball	12-17	25-34	18-24
Bicycle Riding	55-64	45-54	12-17
Billiards/Pool	25-34	34-44	45-54
Bowling	25-34	35-44	18-24
Cheerleading	12-17	7-11	18-24
Exercise Walking	55-64	65-74	45-54
Exercise w/ Equipment	25-34	45-54	55-64
Football (flag)	7-11	12-17	25-34
Football (tackle)	12-17	18-24	7-11
Football (touch)	12-17	25-34	7-11
Gymnastics	7-11	12-17	25-34
Lacrosse	12-17	7-11	18-24
Martial Arts MMA	7-11	25-34	12-17
Pickleball	12-17	65-74	18-24
Pilates	25-34	35-44	45-54
Running/Jogging	25-34	35-44	45-54
Skateboarding	12-17	18-24	7-11
Soccer	7-11	12-17	25-34
Softball	12-17	7-11	25-34
Swimming	55-64	12-17	7-11
Tables Tennis	25-34	18-24	12-17
Tennis	25-34	35-44	12-17
Volleyball	12-17	25-34	18-24
Weight Lifting	25-34	45-54	35-44
Workout at Clubs	25-34	35-44	45-54
Wrestling	12-17	25-34	7-11
Yoga	25-34	35-44	45-54
Did Not Participate	45-54	55-64	65-74

Largest: Age group with the highest rate of participation.
Second Largest: Age group with the second highest rate of participation.
Third Largest: Age group with the third highest rate of participation.

National Sports Participation Trends: Below are listed several sports activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2010-2019). The green shaded area represent higher percentages of participation than the national level and the reddish shade represents a lower participation level than the national level.

Table I – National Activity Trend (in millions)

	2010 Participation	2019 Participation	Percent Change
Kayaking	5.6	10.7	90.9%
Yoga	20.2	31.8	57.6%
Running/Jogging	35.5	46.0	29.7%
Gymnastics	4.8	5.9	23.8%
Aerobic Exercising	38.5	47.4	23.2%
Weight Lifting	31.5	37.8	20.0%
Cheerleading	0.0	3.7	18.0%
Wrestling	2.9	3.3	15.0%
Exercise Walking	95.8	106.5	11.2%
Workout @ Club	36.3	39.6	9.1%
Lacrosse	2.6	2.8	7.5%
Pilates	5.5	5.9	7.1%
Exercising w/ Equipment	55.3	58.3	5.5%
Ice/Figure Skating	8.2	8.6	5.3%
Soccer	13.5	14.2	5.2%
Volleyball	10.6	10.6	0.2%
Hockey (ice)	3.3	3.3	0.0%
Tennis	12.3	12.2	-0.6%
Baseball	12.5	12.2	-2.0%
Football (flag)	6.7	6.5	-2.9%
Football (touch)	9.3	8.9	-4.0%
Bicycle Riding	39.8	37.8	-5.1%
Martial Arts / MMA	6.4	6.0	-5.8%
Basketball	26.9	25.2	-6.2%
Softball	10.8	10.1	-6.8%
Swimming	51.9	48.0	-7.4%
Golf	21.9	17.9	-18.3%
Football (tackle)	9.3	7.3	-21.3%
Mountain Biking (off road)	7.2	5.6	-21.7%
Table Tennis/Ping Pong	12.8	9.9	-22.4%

2010 Participation: The number of participants per year in the activity (in millions) in the United States.
2019 Participation: The number of participants per year in the activity (in millions) in the United States.
Percent Change: The percent change in the level of participation from 2010 to 2019.

Recreation Activity and Facility Trends: There continues to be very strong growth in the number of people participating in recreation and leisure activities. The Physical Activity Council in its 2013 study indicated that 33% of Americans (age 6 and older) are active to a healthy level. However, the study also indicated that 28% of Americans were inactive. It is estimated that one in five Americans over the age of six participates in some form of fitness related activity at least once a week. Statistics also indicate that approximately 12 out of every 100 people of the U.S. population (or 12%) belong to a health club. On the other side, most public recreation centers attract between 20% and 30% of a market area (more than once) during a year. All of this indicates the relative strength of a market for a community recreation facility. However, despite these increases the American population continues to lead a rather sedentary life with an average of 25% of people across the country reporting that they engage in no physical activity (per The Center for Disease Control).

One of the areas of greatest participant growth over the last 10 years is in fitness related activities such as yoga, weight lifting, running/jogging, aerobic exercise and exercise walking. Also, showing particularly strong growth numbers are ice hockey and running/jogging while swimming participation remains consistently high despite recent drops in overall numbers. It is significant that many of the activities that can take place in an indoor recreation setting are ranked in the top fifteen in overall participation by the National Sporting Goods Association.

Due to the increasing recreational demands, there has been a shortage in most communities of the following spaces:

- Gymsnasiums
- Pools (especially leisure pools)
- Weight/cardiovascular equipment areas
- Indoor running/walking tracks
- Meeting/multipurpose (general program) space
- Senior's program space
- Pre-school and youth space
- Teen use areas
- Fieldhouses

Thus, many communities have attempted to include these amenities in public community recreation facilities. With the growth in youth sports and the high demand for school gyms, most communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most recreation departments is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active senior (usually age 55-70) is paramount, as this age group has the free time available to participate in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services.

Youth programming has always been a cornerstone for recreation services and will continue to be so with an increased emphasis on teen needs and providing a deterrent to juvenile crime. With a continuing increase in single parent households and two working parent families, the needs of school age children for before and after school childcare continues to grow as does the need for preschool programming.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. One of the other issues of competition comes from the non-profit sector (primarily YMCA's but also JCC's, and others), where the market is much closer to that of the public providers. While not as vociferous as the private providers, the non-profits have also often expressed concern over public community recreation centers. What has resulted from this is a strong growth in the number of partnerships that have occurred between the public and non-profit sector in an attempt to bring the best recreation amenities to a community.

Aquatic Participation Trends: Swimming is one of the most popular sports and leisure activities, meaning that there is a significant market for aquatic pursuits. Approximately 13.8% of the population in the Pacific region of the country participates in aquatic activities. This is a significant segment of the population.

Despite the recent emphasis on recreational swimming the more traditional aspects of aquatics (including swim teams, instruction and aqua fitness) remain as an important part of most aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive swim team programs through USA Swimming, high schools, masters, and other community-based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.

A competitive pool allows for a variety of aquatic activities to take place simultaneously and can handle aqua exercise classes, learn to swim programs as well competitive swim training and meets (short course and possibly long course). In communities where there are several competitive swim programs, utilizing a pool with 8 lanes or more is usually important. A competitive pool that is designed for hosting meets will allow a community to build a more regional or even national identity as a site for competitive swimming. However, it should be realized that regional and national swim meets are difficult to obtain on a regular basis, take a considerable amount of time, effort and money to run; can be disruptive to the regular user groups and can be financial losers for the facility itself. On the other side, such events can provide a strong economic stimulus to the overall community.

Competitive diving is an activity that is often found in connection with competitive swimming. Most high school and regional diving competition centers on the 1-meter board with some 3 meter events (non-high school). The competitive diving market, unlike swimming, is usually very small (usually 10% to 20% the size of the competitive swim market) and has been decreasing steadily over the last ten years or more. Thus, many states have or are considering the elimination of diving as a part of high school swimming. Diving programs have been more viable in markets with larger populations and where there are coaches with strong diving reputations. Moving from springboard diving to platform (5 meter and 10 meter, and sometimes 3 and 7.5 meters), the market for divers drops even more while the cost of construction with deeper pool depths and higher dive towers becomes significantly larger. Platform diving is usually only a competitive event in regional and national diving competitions. As a result, the need for inclusion of diving platforms in a competitive aquatic facility needs to be carefully studied to determine the true economic feasibility of such an amenity.

There are a couple of other aquatic sports that are often competing for pool time at competitive aquatic centers. However, their competition base and number of participants is relatively small. Water polo is a sport that continues to be reasonably popular on the west coast but is not nearly as strong in Ohio and uses a space of 25 yards or meters by 45-66 feet wide (the basic size of an 8 lane, 25-yard pool). However, a minimum depth of 6 foot 6 inches is required which is often difficult to find in more community based facilities. Synchronized swimming also utilizes aquatic facilities for their sport and they also require deeper water of 7-8 feet. This also makes the use of some community pools difficult.

Without doubt the hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, lazy rivers (or current channels), fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings has greatly diminished. Leisure pools appeal to the younger kids (who are the largest segment of the population that swims) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 30% more revenue than a comparable conventional pool and the cost of operation while being higher, has been offset through increased revenues. Of note is the fact that patrons seem willing to pay a higher user fee with this type of pool that is in a park like setting than a conventional aquatics facility.

Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for relaxation, socialization, and rehabilitation. This has been effective in bringing in swimmers who are looking for a different experience and non-swimmers who want the advantages of warm water in a different setting. The development of natural landscapes has enhanced this type of amenity and created a pleasant atmosphere for adult socialization.

The multi-function indoor aquatic center concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of aquatics activities and programs in an open design setting that features a lot of natural light, interactive play features and access to an outdoor sun deck. The placing of traditional instructional/competitive pools, with shallow depth/interactive leisure pools and therapy water, in the same facility has been well received in the market. This idea has proven to be financially successful by centralizing pool operations for recreation service providers and through increased generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting. Indoor aquatic centers have been instrumental in developing a true family appeal for community-based facilities. The keys to success for this type of center revolve around the concept of intergenerational use in a quality facility that has an exciting and vibrant feel in an outdoor like atmosphere.

Also changing is the orientation of aquatic centers from stand-alone facilities that only have aquatic features to more of a full-service recreation center that has fitness, sports and community-based amenities. This change has allowed for a better rate of cost recovery and stronger rates of use of the aquatic portion of the facility as well as the other "dry side" amenities.

Aquatic Facilities Market Orientation: Based on the market information, the existing pools, and typical aquatic needs within a community, there are specific market areas that need to be addressed with any aquatic facility. These include:

1. **Leisure/recreation aquatic activities** - This includes a variety of activities found at leisure pools with zero depth entry, warm water, play apparatus, slides, seating areas and deck space. These are often combined with other non-aquatic areas such as concessions and birthday party or other group event areas.

2. **Instructional programming** – The primary emphasis is on teaching swimming and lifesaving skills to many different age groups. These activities have traditionally taken place in more conventional pool configurations but should not be confined to just these spaces. Reasonably warm water, shallow depth with deeper water (4 ft. or more), and open expanses of water are necessary for instructional activities. Easy pool access, a viewing area for parents, and deck space for instructors is also crucial.
3. **Fitness programming** – These types of activities continue to grow in popularity among a large segment of the population. From aqua exercise classes, to lap swimming times, these programs take place in more traditional settings that have lap lanes and large open expanses of water available at a 3 1/2 to 5 ft. depth.
4. **Therapy** – A growing market segment for many aquatic centers is the use of warm, shallow water for therapy and rehabilitation purposes. Many of these services are offered by medically based organizations that partner with the center for this purpose.
5. **Social/relaxation** - The appeal of using an aquatics area for relaxation has become a primary focus of many aquatic facilities. This concept has been very effective in drawing non-swimmers to aquatic facilities and expanding the market beyond the traditional swimming boundaries. The use of natural landscapes and creative pool designs that integrate the social elements with swimming activities has been most effective in reaching this market segment.
6. **Special events/rentals** - There is a market for special events including kid's birthday parties, corporate events, community organization functions, and general rentals to outside groups. The development of this market will aid in the generation of additional revenues and these events/rentals can often be planned for after or before regular hours or during slow use times. It is important that special events or rentals not adversely affect daily operations or overall center use.

Specific market segments include:

1. **Families** – Within this market, an orientation towards family activities is essential. The ability to have family members of different ages participate in a fun and vibrant facility is essential.
2. **Pre-school children** – The needs of pre-school age children need to be met with very shallow or zero depth water which is warm and has play apparatus designed for their use. Interactive programming involving parents and toddlers can also be conducted in more traditional aquatic areas as well.
3. **School age youth** – A major focus of most pools is to meet the needs of this age group from recreational swimming to competitive aquatics. The leisure components such as slides, fountains, lazy rivers and zero depth will help to bring these individuals to the pool on a regular basis for drop-in recreational swimming. The lap lanes provide the opportunity and space necessary for instructional programs and aquatic team use.
4. **Teens** – Another aspect of many pools is meeting the needs of the teenage population. Serving the needs of this age group will require leisure pool amenities that will keep their interest (slides) as well as the designation of certain “teen” times of use.
5. **Adults** – This age group has a variety of needs from aquatic exercise classes to lap swimming, triathlon training and competitive swimming through the master’s program.
6. **Seniors** – As the population of the United States and the service area continues to age, meeting the needs of an older senior population will be essential. A more active and physically oriented senior is now demanding services to ensure their continued health. Aqua exercise, lap swimming, therapeutic conditioning and even learn to swim classes have proven to be popular with this age group.
7. **Special needs population** – This is a secondary market, but with the A.D.A. requirements and the existence of shallow warm water and other components, the amenities are present to develop programs for this population segment. Association with a hospital and other therapeutic and social service agencies will be necessary to reach this market.
8. **Special interest groups** – These include swim teams (and other aquatic teams), school district teams, day care centers and social service organizations. While the needs of these groups can be great, their demands on an aquatics center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

With the proper pools and strong utilization of the aquatics area, it is possible to meet most of the varied market orientations as outlined above.

Section IV - Alternative Service Providers

Service Area Providers: There are a number of alternative service providers in the general area that are supplying aquatic, recreation, fitness, and sports activities. The following is a brief review of each of the alternative service providers identified in the area.

Private

There are numerous private fitness providers in the area that provide a wide variety of focus, specialty and price structure.

Planet Fitness: This is a national chain than offers entry level fitness opportunity at a low cost. There business model is built on high volume and a low monthly fee of \$10.00 per month which appealing to many people, especially younger adults.

Power Shack: A regional fitness chain offering a vast array of fitness, cardio equipment and personal training. Monthly fees are \$49 per person.

Crunch Fitness: A national franchise that provides fitness equipment, cardio equipment, fitness classes and personal training. Fee range from \$9.95 to \$29.95 per month.

Metro Fitness: A regional fitness chain that provides fitness classes, functional training and weight training.

Renovo Fitness: An independent gym that features personal training, boot camp, cycling water fitness and massage therapy.

9Round Kickboxing: Specialty fitness center focused on kickboxing classes. Membership is \$30 per person for unlimited classes.

Mat Happy Yoga: A regional yoga studio offering both in studio and online class options. A wide variety of classes are offerings. Individual class fees range from \$12 online to \$18 in studio to \$79 monthly (unlimited).

Orangetheory: This is a high-end specialized training facility that offers group classes and interval training. Programs are offered via purchasing class packages or a defined number of classes per month. The price structure ranges from \$59 to \$159 per month depending on frequency of training.

Lifetime Fitness: This is a full-service national chain that represents the top level of facility and services. Clubs offer swimming group fitness, fitness equipment, fitness classes, children programming, swimming pool and up graded support spaces. Club fees range from \$84 to \$249 per month.

LA Fitness: This is a national chain that serves as a full-service gym. Amenities include a small basketball court, swimming pool, group exercise, fitness equipment, racquetball and kids' area. Fees range from \$29.99 to \$32.99 per month.

Cross Fit Hilliard: This independent gym is a CrossFit based facility that offers a fusion of faith and fitness. The gym has CrossFit type equipment and functional training. Monthly membership fees are \$120 per person.

Spenga Gym: This is a national franchise chain that offers a customize fitness model built on the foundation of cardio, strength and flexibility at individual exercise stations. Fees range from \$159 to \$69 per month.

Hard Fought Fitness: A locally owned gym that specializes in personalized instruction with free weights and functional training equipment. Specialized sport lessons are available for \$60 and general membership costs \$100 per month.

Mighty Mick's: This independent gym has a core strength emphasis with functional exercise equipment and cross training equipment. Gym membership is \$75 per person monthly and \$50 monthly for high school students.

Sports

Fliptastic Gymnastics Center: A private gymnastics center that provides full-service gymnastic training. The facility contains a main gym area for classes and competitive gymnastics team and two smaller tumbling areas for children under 5 years old. Registration and fees vary by age, skill development and level.

Santos Indoor Sports: A small indoor soccer field providing training for the Santos FC soccer club. Access is available to program participants through Club scheduling.

Big Run Sports: Ohio Valley Region Volleyball is operated under the umbrella of USA Volleyball and boasts over 22,500 members (pre-COVID). The facility holds upwards of 24 volleyball courts and offers competitive volleyball for juniors through adults. Fees vary by age and team.

Bo Jackson

Aquatic Adventures

Athletic Revolution

Shed

Tai Kwon Do

Hilliard Tai Kwon Do

Hilliard Martial Arts

Non-Profit

Ray Patch YMCA: By virtue of its program offerings the YMCA is the closest comparison to a municipal community center. Beyond the similarity in programs and facilities the YMCA is strictly a membership driven business model and consequently have a higher fee schedule than most municipal models.



Section V – Recreation Programs and Services

While the City of Hilliard has a strong foundation of parks and recreation facilities, programs and services, there are some unmet needs identified. This combined with an aging inventory of existing facilities, the presence of alternative service providers, plus limited resources, places a challenge to the City in responding to these needs.

Current Recreation Programs and Services Assessment: The Parks and Recreation Department offers a number of recreation programs and services to the residents of Hilliard and the surrounding area. Important issues with programming include:

- The Parks and Recreation Department focuses much of its programming efforts on youth, sports, senior, adults, enrichment and special events and activities.
- Recreation programs and services are generally planned and delivered on a community level to be responsive to varying needs and expectations.
- Current Parks and Recreation Department programs and services include these general areas:

Specific Recreation Program and Services

Sports

Youth

Lil Ballers
Youth sports specific
Swim Lessons
Shooting Stars Basketball
Lil Slugger T-Ball
Soccer Shots
Learn to Volleyball
Minor League Baseball
Mini Sports Camps
Sporties for Shorties
Little Kickers
Amazing Athletes
Karate
Have a Ball

Adult

Softball-CoEd, Men's and Senior
Volleyball, Women's, Men's, Co-Rec
Karate
Cricket

Fitness/Wellness

- Fitness Equipment
- Motivation at the Station
- Lifestyle Fitness
- Zumba
- Yoga
- Tai Chi
- Indoor Walking

Cultural Arts

- Visual Arts (painting, ceramics, etc.)
- Pottery
- Dance
- Drama
- Young Rembrandts
- Stories at the Station
- Creation at the station

Youth

- Schools out camps
- Summer camps – themed camps
- Before/After Camp
- Yoga
- Safety Town

Events

- Fall Festival
- Tree Lighting
- Get the Scoop
- Drive In Movies
- Sprouts Night Out
- Celebration at the Station
- Freedom Fest-July 4th celebration
- Earth Day
- Senior Hall of Fame
- Fishing Derby
- Wheels and Waffles

Seniors

Museum Tours
Music Events
Plays/Shows
Presentations
Casino Trips
Scioto Downs
Halloween Lunch
Thanksgiving Lunch
Christmas Lunch

Happiness Club
Home Repairs
Medicare Education
“How To’ Workshops
Financial Planning
Tax Support
Personal Health
Flexibility and Balance
Euchre
Health and Wellness
Meal Program
Bowling
Pickleball
Golf
Horseshoes

Local Shopping
Hilliard Express
Alzheimer’s Support Group
Bingo
Bible Study
Open Studio
Pinochle
Bridge
Duplicate Bridge
Billiards
Special event Luncheons: Prom, Kentucky Derby

Outdoor Recreation
Disc Golf
Community Gardens
Shelter Rentals
Hilliard Hikes

Trail Riders
Park Scavenger Hunts
Playtime at the Playground
Bike events
Birding
Fishing
Pickleball
Tennis
Horseshoes
Gaga Pit
Sledding
Playgrounds
Trails
Soccer fields
Baseball fields
Cricket pitch

Aquatics

Lessons
Synchronized Swim
Adaptive Swim
Dog Swim
Christmas in July
Shark Week
The Last Splash Blast
Splash into Summer
Senior Luau
Swim Team
Dive Team
Water Walking
Drop in and Swim
Sea Pups
Toddler Swim

General Programs

Gaming at the Station
Cooking Classes
E-Sports
Rec Camp
CrafTea
Activity Bags

Section VI – Stakeholder Meetings

A series of stakeholder meets were conducted to gain an understanding of program needs, opinions and recommendations regarding a new community center. A total of 32 different agencies and organizations participated in the stakeholder meetings that were held March 2-3. A summary of key findings is highlighted below.

Businesses

There was unanimous affirmation that the City of Hilliard needs a new community center. Several participants mentioned that the existing community center is dated and not meeting the needs of the community. Specifically, the lack of meeting room space was identified as a component lacking in the community. It was also pointed out how valuable a vibrant and modern community center is to help attract employees to Hilliard and the money for recreation facilities is leaving Hilliard. Some thought the development in New Albany has a correlation to the opening of the Heights.

Specific components that were mentioned included racquet ball courts, multiple meeting room space that can be divided into three smaller spaces that can accommodate 20-50 people, catering kitchen connected to the meeting rooms, fitness center with cardio, weight and group exercise, a 3-court gymnasium, Aquatic center with a competitive pool with seating and a separate recreation/leisure pool, jog/walk track, and an indoor playground. Some felt the community center should be viewed as a safe place for kids and access to outdoor spaces.

All participants viewed the use of increasing the income tax as a legitimate funding option and felt there should be some level of medical integration in the facility.

School District/Township:

This group felt that the community was lacking event space, gymnasium space and a pool. From the school district's perspective, they are good with the quality and quantity of outdoor field space and the field house space they have meets their programming needs during the spring season. The school district is lacking adequate space for swim teams, bowling and gymnastics. There was a consensus that a new community center is needed in Hilliard.

Specific components that were mentioned included multi-purpose gymnasium space with at least 3 courts and spectator space, a large meeting room space (200 people) with a catering kitchen and can be segmented into three or four smaller meeting rooms, an indoor competition and separate recreation pool, event space, fitness area with cardio and weight equipment, group exercise rooms, indoor walking/jogging track, golf simulator, child care facility, quiet space for reading, health care/hospital space and satellite subway kiosk.

There was support for using a income tax as a potential funding source along with exploring the formation of a recreation district. Many felt that there needs to be a sensitivity to keeping the community center affordable.

Youth Sports Group

Representatives from the Colt Baseball organization, Hilliard Baseball, Northwest Soccer Club, Hilliard Girls Softball, Marlin's Swim Team and Hilliard Ohio Soccer Club. Although most of the groups represented outdoor sports the discussion centered on their needs for indoor training spaces to support their programs. However, there was a consensus that there are not enough fields available in Hilliard. Some of the organizations indicated that there is a lack of indoor training facilities in the area, especially travel baseball. Although most organizations were not looking for indoor training opportunities there was strong support that a community center in Hilliard is needed for residents. The swim club mentioned that the YMCA is not adequate to meet the competitive swim teams in the area.

Specific components that were mentioned include a large 4-8 court gym with one of the playing surfaces being a multi-sport surface, indoor walking/jogging track, baseball cages, golf net, mat room for wrestling, rock climbing wall, indoor competitive pool and separate leisure/recreation pool, fitness area with cardio, weight training and group exercise space, sport specific training (medically driven), indoor field house, large meeting room space that can be divided into smaller rooms and access to outdoor fields with lighting.

A comment was made that the potential increase in the income tax rate should include a finite list of projects and improvements to parks and recreation facilities, including a new community center. Others felt the global approach to addressing the park and recreation needs made sense and would increase the likelihood of community support. Two of the groups mentioned they have a capital fund within their organizations for future facility needs.

Staff

Staff reported several issues with the existing center including roof leaks, electrical issues, traffic flow issues, security issues, no air conditioning, spaces are too small, the facility is dated, no ADA accessibility, no family change rooms, limited office space and sound system issues. All the participants were in agreement that a new community center is needed.

Specific components that were mentioned included a dedicated child watch area, indoor pool for both leisure and competitive swim, yoga studio, large multi-purpose room that can be divided into thirds with a catering kitchen, dedicated teen area, demonstration kitchen, birthday party room, dedicated art room with Kiln, fitness area including cardio, weight training and group exercise rooms, multi-purpose

3-court gymnasium or two court gym with a gym annex, spinning studio, hospital/wellness center for PT/rehab/message therapy.

This group realizes a new community center will significantly change their jobs by more interaction with the public, more activities in the winter and significantly busier at all times. There was consensus that the income tax option for funding was the best method for capital.

Hospital

There was a strong sensitivity to mental health issues facing the community. It was reported that 80% of adult mental health issues can be traced back to some traumatic event. Also noted was that travel issues are the top reason for cancelations of doctor appointments. The group felt it was important to find and fill the gap in health services and mentioned that the community center and YMCA could co-exist, and the YMCA is only reaching a small portion of the community,

Specific components that were mentioned included a gymnasium space with an elevated walking/jogging track, fitness area with cardio and weight equipment, group exercise spaces, dedicated senior space, education rooms (2-3), shared resources space for agencies serving public health, PT area, demonstration kitchen, resource center, corporate wellness, sports training area, access for after school after school programming and an aquatic center.

All participants thought a new community center is needed and the community center should be a safe place that brings the community together. The community center also has the potential to stimulate economic development and become a anchor for the community.

Arts/Seniors

This group reported that the existing senior center is outdated and missing many amenities of other senior centers in the area. The current facility is lacking the meeting room space required, dedicated arts and crafts room, wood exercise floor and gallery space to display art projects. All the participants felt the community center should serve all ages and stimulating experiences.

Specific components that were mentioned included a large meeting room space that could be divided into smaller class rooms, dedicated arts and crafts room, fitness space for cardio, weight training and group exercise, large kitchen to serve the meal program, retail space, gallery space throughout the center, art council office space, warm water pool.

All participants felt that the income tax was a reasonable method to fund the community center.

Non-profit/Churches

Most of this group believed a new community center was needed. Many felt the existing center was dated and no longer served the community. The group felts that the existing center lacked spaces for

events and the number of private basketball courts being built is an indication the community is lacking space.

Specific components that were mentioned included a 4-court gymnasium space, indoor pool for competitive and recreation swimming, large meeting room space that can divided into 3 smaller rooms with a kitchen, childcare space, fitness area for cardio, wight training and group exercise, pre-school area, and outdoor field space.

Most felt that using an increase in the income tax to fund the community center made sense. However, it was pointed out that the ballot language and use of the increase in income tax revenue be used for more capital improvements than just a community center.

Section VII – Program Recommendation

The focus of the overall project is on meeting the community's recreational and wellness needs of the Hilliard. Based on the statistical analysis, feedback collected from community stakeholder, community survey results and analysis of alternative service providers the following recommendations for a community center are possible and the following represents the program recommendation.

Gymnasium – A space that is approximately 18,000 sq. ft. and divisible into 3 regulation-sized basketball courts. smaller gym spaces by a drop curtain. The main gymnasium space should be set up for a variety of activities including youth/adult basketball, youth/adult volleyball, dance and potentially event/trade show space. Portable seating should be included (tip and roll type bleachers). In addition, an auxiliary gym approximately 5,000 SF with a multi-sport surface for high velocity sports.

It should be noted that the existing gymnasium at the Community Center is not regulation sized and inadequate for many activities and programs. A walking/jogging track rated highly from the stakeholder meeting, and community survey. This is important in that a track requires a significant footprint to generate a respectable distance and typically goes around the perimeter of a regulation sized gymnasium, A 3-court gymnasium will allow for Parks and Recreation programming, drop-in play and team rentals all at the same time. The size of the facility will also accommodate tournament play and special events.

Aerobic/Fitness/Dance Area - An area approximately 1,500 sf that features a mirrored wall, dance bars mounted on the wall, free-floating impact floor, sound system, storage area and storage cubbies. This space would be used for aerobics, dance, and martial arts programs.

In addition, two smaller studios dedicated for Yoga, Pilates and Spinning. Interest and participation in fitness classes are on the rise nationally, recording a 23% increase in participation over the past 10 years and 57% increase for Yoga. Group fitness space has proved to be a popular amenity in centers around the country and it is not uncommon to have between 25-40 classes per week in these spaces.

Weight/Cardiovascular Area – A space of about 6,000 sf for weight and cardio equipment. Without question a cardio and weight area have become the cornerstone for most community recreation center because they tend to drive membership and revenue. Interest and support for a fitness space ranked high with the stakeholder groups and community survey results. There is evidence that the fitness needs in the community are not totally being met by the number of private fitness centers and YMCA in the community. A fitness space typically includes free weights, selectorized machines and cardiovascular equipment. In addition, a small space dedicated to health screenings and personal training client space.

Statistically, fitness and exercise have not reached a saturation point and exercise and fitness are one of the components that will drive membership, daily admission and participation. Although the need for additional fitness and exercise equipment can be justified statistically and through the public engagement process, winning public and political support for the element could present a challenge. The private fitness and YMCA operators will vigorously challenge and oppose the project that will be viewed as unfair competition.

Multi-Purpose Room – One of the most frequently heard comment through the stakeholder meetings was the need for multipurpose meeting room space and this type of space helps to distinguish the proposed community center from other facilities in the area. As a result, several (2-4) spaces that can accommodate small classes and meeting room space. One larger meeting room of about 3,500 SF that could be divided into thirds will provide the City of Hilliard with the maximum flexibility and potentially banquets. There were several different opinions as to what size this multi-purpose space should be. Additionally, there should be a catering type kitchen connected to the or in close proximity to the meeting room.

Indoor Playground - A themed area designed for children ages 2-10 featuring a fun land with creative and interactive play equipment including a complex matrix of tubes, spiral slides, climbing apparatus, interactive music, hollow logs, and multi-level play structure. This space could help differentiate the proposed community center from other centers in the area. This space should be approximately 3,000 sq. ft.

Child Watch – A room of approximately 2,500 sq. ft. that is immediately adjacent to the leisure indoor play area and lobby. This space will be used for short-term babysitting services for members participating in programs and activities in the center. This space should be adjacent to the indoor playground.

Aquatic Area – There was significant interest for an aquatic facility through this process. Recognizing the importance of competitive and exercise lap swimming, the consulting team believes the aquatic area needs to meet both the lap/exercise and recreation needs of the community. Community needs are currently greatest for the therapeutic and recreational aquatic elements. Facilities built today for community needs typically include a free-flowing leisure pool design that provides zero depth entry, water plan features, water slide, water sprays, current channel and area for water exercise. A space that is approximately 18,000 sq ft. will be needed to accommodate both the competitive pool and leisure pool design. The aquatic area should be supported by a whirlpool spa and separate teaching/therapy pool that can accommodate multiple activities including rehabilitation, senior programs and swim lessons.

Community Gathering Space – A dedicated space of about 5,000 sq ft. for the potential partnership with The Ohio State Health System. Continued partnership meetings will help define the size and specific components within this dedicated space.

Resource Center – A space of about 300 sq. ft. for a community resource center. In addition to providing information and education material this space could also serve as a satellite office for multiple social service support organizations in the community.

Dedicated Art Room – Many of the stakeholders highlighted the need for a dedicated art space in the community center with 2 Kilns for pottery. A space of about 2,500 sq. ft. could serve many different visual art platforms and will require a significant storage are for supplies and project storage. In addition, gallery space should be incorporated into the community center design with built in display cases and designed wall space for displaying community art.

Support Spaces – There must be sufficient space and resources allocated for the following:

- Lobby/lounge space
- Front desk area, office space
- Restrooms/Locker Rooms
- Concession/vending
- Storage, storage, storage

Facility Program Summary

Component	Sq. Ft. Size
Gymnasium	18,000
Auxiliary Gym	5,000
Fitness Space	6,000
Group Exercise	2,000
Dedicated Senior Center	4,000
Class Rooms	1,200
Multi-Purpose Room	3,500
Indoor Playground	3,000
Child Watch	2,500
Aquatic Center	18,000
Retail Space	6,000
Resource Center	300
Art Room	3,000
Maker Space	1,000
Support Spaces	12,500
Sub-Total	85,500
Circulation (18%)	15,000
Total	100,500

Note: This is a preliminary facility program only and is pending approval of the City of Hilliard. Validation of the square footage, and circulation percentage needs to be verified by MSA Architects.

Section VIII – Operations Analysis

Operations

The operations analysis represents a conservative approach to estimating expenses and revenues and was completed based on the best information available and a basic understanding of the project. Fees and charges utilized for this study reflect a philosophy designed to meet a reasonable cost recovery rate and future operations cost and are subject to review, change, and approval by the City of Hilliard. There is no guarantee that the expense and revenue projections outlined in the operations analysis will be met as there are many variables that affect such estimates that either cannot be accurately measured or are subject to change during the actual budgetary process or partnership.

Expenditures

Expenditures have been formulated on the costs that were designated by Ballard*King and Associates to be included in the operating budget for the facility. The figures are based on the size of the center, the specific components of the facility, and the hours of operation. All expenses were calculated to the high side and the actual cost may be less based on the final design, operational philosophy, and programming considerations adopted by the facility.

Hilliard Community Center – A center with a multi-court gymnasium, warm water leisure pool with zero depth entry and play features, lap pool, multi-purpose room, walking/jogging track, fitness center with cardiovascular and weight lifting area, group exercise rooms, birthday party rooms, child watch area, dedicated senior space, community gather space, resources center, indoor play structure, maker space, dedicated class room space, support offices, administration area and lobby. The center is approximately 100,500 SF.

Full-Time Staffing Levels

Facility Manager	\$85,000
Fitness Coordinator	\$60,000
Guest Services Supervisor	\$45,000
Maintenance Supervisor	\$60,000
Maintenance Worker (2)	\$90,000
Administrative Assistant	\$40,000
Sub-Total	\$380,000
Benefits (35%)	\$133,000
Total Full-Time Staff	\$513,000

Part-Time Staffing Levels

	Rate	Hours	Weeks	Total
Guest Relations Coordinator	\$13.00	56	51	\$37,128
Welcome Desk	\$12.00	177	51	\$108,324
Fitness Attendants	\$12.00	103	51	\$63,036
Gym Attendant	\$12.00	50	32	\$19,200
B'Day Attendant	\$12.00	15	50	\$9,000
Child Watch Attendant	\$12.00	127	51	\$77,724
Playground Attendant	\$12.00	134	51	\$82,008
Lifeguards 36 wks	\$12.00	429	36	\$185,328
Lifeguards 15 wks	\$12.00	523	15	\$94,140
Lifeguards (lap pool)	\$12.00	179	51	\$109,548
Head Guard	\$13.00	55	51	\$36,465
Building Attendant	\$12.00	141	51	\$86,292
Adult Leagues				\$19,560
Youth Leagues				\$18,360
Youth Sports Camps				\$7,200
Youth Tournaments				\$5,620
Adult Tournaments				\$2,565
Fitness				\$113,360
General				\$49,432
Aquatics				\$29,475
Aquatic Fitness				\$16,650
Sub-Total				\$1,170,415
Benefits				\$175,562
Total Part-Time				\$1,345,977



Expense Summary

Category	Budget
<u>Personnel</u> (includes benefits)	
Full-time	513,000
Part-time	1,345,977
Sub-Total	\$ 1,858,977
Utilities (Gas/Elect.-\$3.25 SF x 100,000 SF less 18% for circulation)	266,500
Water/Sanitary	35,000
Communications (Phone/Radios)	18,000
Dues and Subscriptions	2,000
Uniforms	4,000
Bank Charges (charge cards/EFT fees/software fees)	25,000
Insurance-General Liability	35,000
Custodial Supplies	18,000
Supplies-Office	15,000
Contract Services (Elevator/HVAC/Pool System/Control System)	45,000
ASCAP/Fire Alarm/Office Equipment/Software)	
Maint/Repair Supplies	15,000
Printing	8,500
Trash	4,000
Recreation Equipment and Supplies	48,000
Food Supplies	1,500
Pool Chemicals and Supplies	30,000
Postage	2,000
Advertising and Promotion	20,000
Items for Resale	3,500
Misc	12,000
Sub-Total	\$ 608,000
<u>Capital</u>	
Replacement fund	\$ 60,000
Grand Total	\$ 2,526,977

Revenues

The following revenue projections were formulated from information on the specifics of the project and the demographics of the service area as well as comparing them to national statistics, other similar facilities and the competition for recreation services in the area. Actual figures will vary based on the size and make-up of the components selected during final design, market stratification, philosophy of operation, fees and charges policy, and priority of use. All revenues were calculated conservatively as a result.

Revenue Summary

<u>Fees</u>	
Daily Admissions	\$ 120,615
Annals	\$ 880,650
General Rentals	\$ 196,320
Total	\$ 1,197,585
<u>Programs</u>	
Adult Sports	\$ 30,800
General	\$ 202,220
Youth Sports	\$ 36,080
Aquatics	\$ 157,140
Fitness	\$ 98,880
Sports Camps	\$ 5,760
Aquatic Exercise	\$ 109,440
Tournaments	\$ 43,100
Birthday	\$ 72,960
Total	\$ 756,380
<u>Other</u>	
Resale Items	\$ 5,250
Special Events	\$ 5,000
Vending	\$ 4,000
Lease Space	\$ 7,500
Sponsorship	\$ 25,000
Misc	\$ 5,000
Total	\$ 51,750
Grand Total	\$ 2,005,715

Expense-Revenue Comparison

Category	Facility Budget
Expense	\$ 2,526,977
Revenue	\$ 2,005,175
Difference	\$ (521,802)
Cost Recovery	79%

This operational pro-forma was completed based on the best information available and a basic understanding of the project. However, there is no guarantee that the expense and revenue projections outlined above will be met as there are many variables that affect such estimates that either cannot be accurately measured or are not consistent in their influence on the budgetary process.

Future years: Expenditures – Revenue Comparison: Operation expenditures are expected to increase by approximately 3% a year through the first 3 to 5 years of operation. Revenue growth is expected to increase by 4% to 8% a year through the first three years and then level off with only a slight growth (3% or less) the next two years. Expenses for the first year of operation should be slightly lower than projected with the facility being under warranty and new. Revenue growth in the first three years is attributed to increased market penetration and in the remaining years to continued population growth. In most recreation facilities, the first three years show tremendous growth from increasing the market share of patrons who use such facilities, but at the end of this time period revenue growth begins to flatten out. It is not uncommon to see the amount of tax support to balance the center budget increase as the facility ages.

Fees and Admissions

Projected Fee Schedule: The fee schedule below was developed as the criteria for estimating revenues. Actual fees are subject to review and approval by the joint powers committee and entities. The monthly rate listed is the cost of an annual pass broken down into twelve equal payments and does not include any handling fees. It should be noted that monthly bank draft convenience for customers would encourage more annual pass sales. However, there are bank fees and a substantial amount of staff time spent managing the bank draft membership base and consideration should be given to pass on some form of a handling fee for bank draft customers. A portion of the fees listed below will be directed to a capital reserve account for future capital equipment replacement needs.

Admissions

Category	Daily	Annual
Adult	\$ 7.00	\$360.00
Adult Couple	NA	\$530.00
Youth	\$ 5.00	\$220.00
Senior	\$ 6.00	\$270.00
Senior Couple	NA	\$420.00
Family	NA	\$675.00

Admission Estimate

Daily Fees	Fees	Weekly Number	Revenue
Adult	\$7.00	70	\$490
Youth	\$5.00	225	\$1,125
Senior	\$6.00	40	\$240
Silver Sneakers	\$3.00	170	\$510
Total		505	\$2,365
			x 51 weeks/year
Grand Total			\$120,615

Annual Passes	Fees	Number	Revenue
Adult	\$360.00	400	\$144,000
Adult Couple	\$530.00	115	\$60,950
Youth	\$220.00	25	\$5,500
Senior	\$270.00	225	\$60,750
Senior Couple	\$420.00	85	\$35,700
Family	\$675.00	850	\$573,750
Total		1700	\$880,650

Section X – Appendix

Part-Time Worksheets

Guest Relations Coordinator	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	3pm-10pm	7	1	5	35
	Saturday	8am-3pm	7	1	1	7
		3pm-10pm	7	1	1	7
	Sunday	1pm-8pm	7	1	1	7
Total						56

Welcome Desk Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	5:30am-Noon	6.5	1	5	32.5
		9am-3pm	5	1	5	25
		3pm-10pm	7	2	5	70
	Saturday	6:00am-2pm	8	2	1	16
		2pm-10pm	8	2	1	16
	Sunday	9:30am-1pm	3.5	1	1	3.5
		1pm-8pm	7	2	1	14
Total						177

Fitness Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	6am-Noon	6	1	5	30
		Noon-5pm	5	1	5	25
		5pm-10pm	5	1	5	25
	Saturday	6am-2pm	8	1	1	8
		2pm-10pm	8	1	1	8
	Sunday	1pm-8pm	7	1	1	7
Total						103

Gym Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
32 weeks	Mon-Fri	4pm-10pm	6	1	5	30
	Saturday	9am-10pm	13	1	1	13
	Sunday	1pm-8pm	7	1	1	7
Total						50

B'Day Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
50 weeks	Friday	6pm-9pm	3	0	1	3
	Saturday	Noon-6pm	6	0	1	6
	Sunday	Noon-6pm	6	0	1	6
Total						15

Child Watch Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	8am-1pm	5	3	5	75
		4pm-8pm	4	2	5	40
	Saturday	10am-4pm	6	2	1	12
Total						127

Playground Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	8am-1pm	5	2	5	50
		3pm-8pm	5	2	5	50
	Saturday	9am-7pm	10	2	1	20
	Sunday	1pm-8pm	7	2	1	14
Total						134

Lifeguard-School (LP)	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
36 weeks	Mon-Fri	8am-1pm	5	3	5	75
		3pm-6pm	3	6	5	90
		6pm-9pm	3	8	5	120
	Saturday	9:00am-Noon	6	4	1	24
		Noon-9pm	9	8	1	72
	Sunday	1pm-7pm	6	8	1	48
Total						429



Lifeguard-Summer (LP)	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
15 weeks	Mon-Fri	8am-1pm	5	3	5	75
		1pm-9pm	8	8	5	320
	Saturday	9am-1pm	4	4	1	16
		1pm-6pm	5	8	1	40
		6pm-9pm	4	6	1	24
	Sunday	1pm-7pm	6	8	1	48
Total						523

Lifeguard Lap Pool	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
	Mon-Fri	5:30am-1pm	6.5	2	5	65
		1pm-9pm	8	2	5	80
	Saturday	9am-1pm	4	2	1	8
		1pm-8pm	7	2	1	14
	Sunday	1pm-7pm	6	2	1	12
Total						179

Head Lifeguard	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
51 weeks	Mon-Fri	3pm-10pm	7	1	5	35
	Saturday	9am-10pm	13	1	1	13
	Sunday	1pm-8pm	7	1	1	7
Total						55

Building Attendant	Days	Time	Total Hours	Employees	Days	Total Hrs. Week
51 weeks	Mon-Fri	8am-1pm	5	2	5	50
		3pm-10pm	7	1	5	35
		9pm-Midnight	3	1	5	15
	Saturday	6:00am-Noon	6	1	1	6
		Noon-10pm	10	2	1	20
		9pm-Midnight	3	1	1	3
	Sunday	Noon-8pm	8	1	1	8
		8pm-Midnight	4	1	1	4
Total						141

Program Staff Worksheets

Adult Leagues	Position	Staff	Rate/Game	Game/Wk	Weeks	Total
Basketball	Official	2	\$20.00	6	20	\$ 4,800
	Scorer	1	\$12.00	6	20	\$ 1,440
Volleyball	Official	1	\$15.00	6	20	\$ 1,800
Indoor Soccer	Official	2	\$20.00	12	24	\$ 11,520
Total						\$ 19,560
Youth Leagues	Position	Staff	Rate/Game	Game/Wk	Weeks	Total
Basketball	Official	2	\$15.00	6	20	\$ 3,600
	Scorer	1	\$12.00	6	20	\$ 1,440
Volleyball	Official	1	\$15.00	6	20	\$ 1,800
Indoor Soccer	Official	2	\$15.00	12	24	\$ 8,640
Total						\$ 18,360

Youth Sports Camps	Position	Staff	Rate/Hr	Number	Hours	Total
Basketball	Coaches	2	\$25.00	2	16	\$ 1,600
Volleyball	Coaches	2	\$25.00	2	16	\$ 1,600
Soccer	Coaches	2	\$25.00	2	16	\$ 1,600
Lacrosse	Coaches	2	\$25.00	1	16	\$ 800
Other	Coaches	2	\$25.00	2	16	\$ 1,600
Total						\$ 7,200

Adult Tournaments	Position	Staff	Rate/Game	Games	Tourn.	Total
Basketball	Official	2	\$20.00	27	1	\$ 1,080
Volleyball	Official	1	\$15.00	27	1	\$ 405
Indoor Soccer	Official	2	\$20.00	27	1	\$ 1,080
Total						\$ 2,565



Youth Tournaments	Position	Staff	Rate/Game	Games	Tourn.	Total
Basketball	Official	2	\$15.00	27	3	\$ 2,430
Volleyball	Official	1	\$15.00	27	2	\$ 810
Indoor Soccer	Official	2	\$15.00	27	3	\$ 2,430
Total						\$ 5,670

Fitness	Rate/Class	Classes/Week	Number of Staff	Weeks	Total
Group Fitness Classes	\$ 30.00	40	1	52	\$ 62,400
Personal Training	\$ 40.00	20	1	52	\$ 41,600
Small Group Training	\$ 30.00	6	1	52	\$ 9,360
Total					\$ 113,360

General Recreation Classes	Rate/Class	Classes/Week	Number of Staff	Weeks	Total
Adult Classes	\$ 15.00	6	1	36	\$ 3,240
Youth/Teen Classes	\$ 15.00	6		36	\$ -
Summer/Break Day Camp					
Supervisor	\$ 13.00	40	1	10	\$ 5,200
Leader	\$ 12.00	40	8	10	\$ 38,400
Misc. Classes	\$ 12.00	6	1	36	\$ 2,592
Total					\$ 49,432

Learn to Swim Classes	Rate/Class	Classes/Day	Days	Weeks	Total
Summer	\$ 12.00	18	5	8	\$ 8,640
Spring/Fall	\$ 12.00	12	2	20	\$ 5,760
Winter	\$ 12.00	9	2	10	\$ 2,160
Total					\$ 16,560

Water Exercise	Rate/Class	Classes/Wk	Weeks	Total
Summer	\$ 25.00	15	14	\$ 5,250
Spring/Fall	\$ 25.00	12	26	\$ 7,800
Winter	\$ 25.00	12	12	\$ 3,600
Total				\$ 16,650

Other	Rate/Class	Classes/Wk	Weeks	Total
Private Lessons	\$ 12.00	6	45	\$ 3,240
Lifeguard Training	\$ 25.00	33	3	\$ 2,475
Misc.	\$ 20.00	6	50	\$ 6,000
Total				\$ 11,715

Camps	Staff	Rate/Hr	Hrs/wk	Weeks	Total
Swim Camp	2	\$ 20.00	10	2	\$ 800
Diving Camp	1	\$ 20.00	10	2	\$ 400
Total					\$ 1,200



Revenue Worksheets

Adult Leagues	Teams	Fee	Seasons	Total
Basketball	14	\$ 750	2	\$ 21,000
Volleyball	14	\$ 350	2	\$ 9,800
	24			
Total				\$ 30,800

Youth Leagues	Teams/Players	Fee	Seasons	Total
Basketball	120	\$ 60	2	\$ 14,400
Volleyball	96	\$ 40	2	\$ 7,680
Soccer	140	\$ 50	2	\$ 14,000
Total				\$ 36,080

Adult Tournament	Teams/Players	Fee	Seasons	Total
Basketball	18	\$ 300	1	\$ 5,400
Volleyball	24	\$ 250	1	\$ 6,000
Soccer	12	\$ 250	1	\$ 3,000
Total				\$ 14,400

Youth Tournament	Teams/Players	Fee	Seasons	Total
Basketball	18	\$ 250	3	\$ 13,500
Volleyball	20	\$ 200	2	\$ 8,000
Soccer	12	\$ 200	3	\$ 7,200
Total				\$ 28,700



General Recreation Classes	Rate/Class	Classes/Week	Participants	Weeks/sessions	Total
Adult Classes	\$ 48.00	6	8	8	\$ 18,432
Youth/Teen Classes	\$ 45.00	8	10	8	\$ 28,800
Summer Camp	\$ 250.00		60	8	\$ 120,000
Pre/Post Care	\$ 45.00		25	8	\$ 9,000
Specialty Camp	\$ 150.00		15	6	\$ 13,500
Misc. Classes	\$ 48.00	4	8	8	\$ 12,288
Total					\$ 202,020

Rentals	Rate/Hr.	Number of Hrs.	Weeks	Total
Meeting room	\$ 50	10	48	\$ 24,000
Large Meeting Room	\$ 250	6	48	\$ 72,000
Gym (per court)	\$ 60	8	32	\$ 15,360
Gym (baseball/softball)	\$ 60	8	24	\$ 11,520
Swim Team (HS)	\$ 72	20	24	\$ 34,560
Swim Team	\$ 72	15	36	\$ 38,880
Total				\$ 196,320

Fitness	Classes/Week	Fee	Participants	Weeks/Sessions	Total
General Classes	40	\$ 5.00	4	48	\$ 38,400
Personal Training	20	\$ 45.00	1	48	\$ 43,200
Small Group	6	\$ 30.00	2	48	\$ 17,280
Total					\$ 98,880

Learn to Swim	Classes/Week	Fee	Participants	Weeks/Sessions	Total
Youth	40	\$ 48.00	6	12	\$ 138,240
Private	1	\$ 35.00	12	45	\$ 18,900
Total					\$ 157,140

Market Analysis

Hilliard, OH



Water Exercise	Classes/Week	Fee	Participants	Weeks/Sessions	Total
Adult	12	\$ 48.00	15	12	\$ 103,680
Swim Camps	12	\$ 40.00	12	1	\$ 5,760
Total					\$ 109,440

Birthday Parties	Classes/Week	Fee	Participants	Weeks/Sessions	Total
Pool Parties	28	\$ 160.00	0	12	\$ 53,760
Art Parties	10	\$ 160.00	0	12	\$ 19,200
Total					\$ 72,960