



# **ROXBOROUGH VILLAGE METROPOLITAN COMMUNITY CENTER**

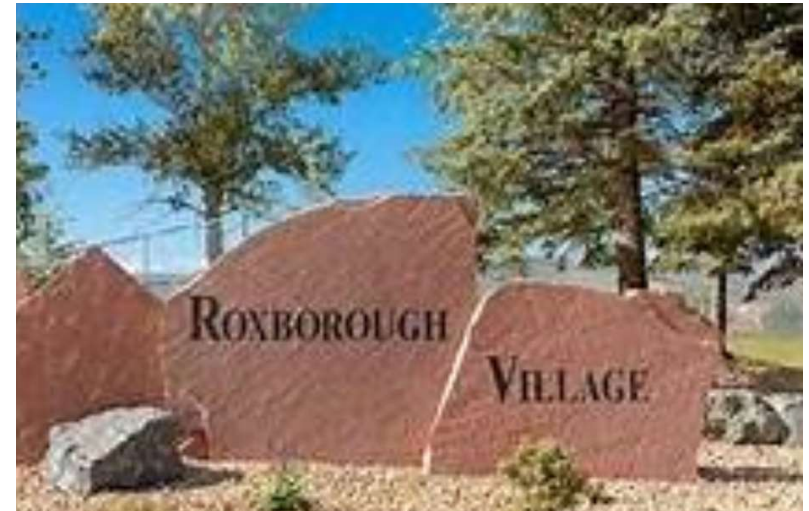
## **Site Feasibility Analysis Report of FINDINGS**

**Prepared By:**

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**Business Intelligence Specialists**

**[www.greaterthananalytics.com](http://www.greaterthananalytics.com)**

**JULY 2020**

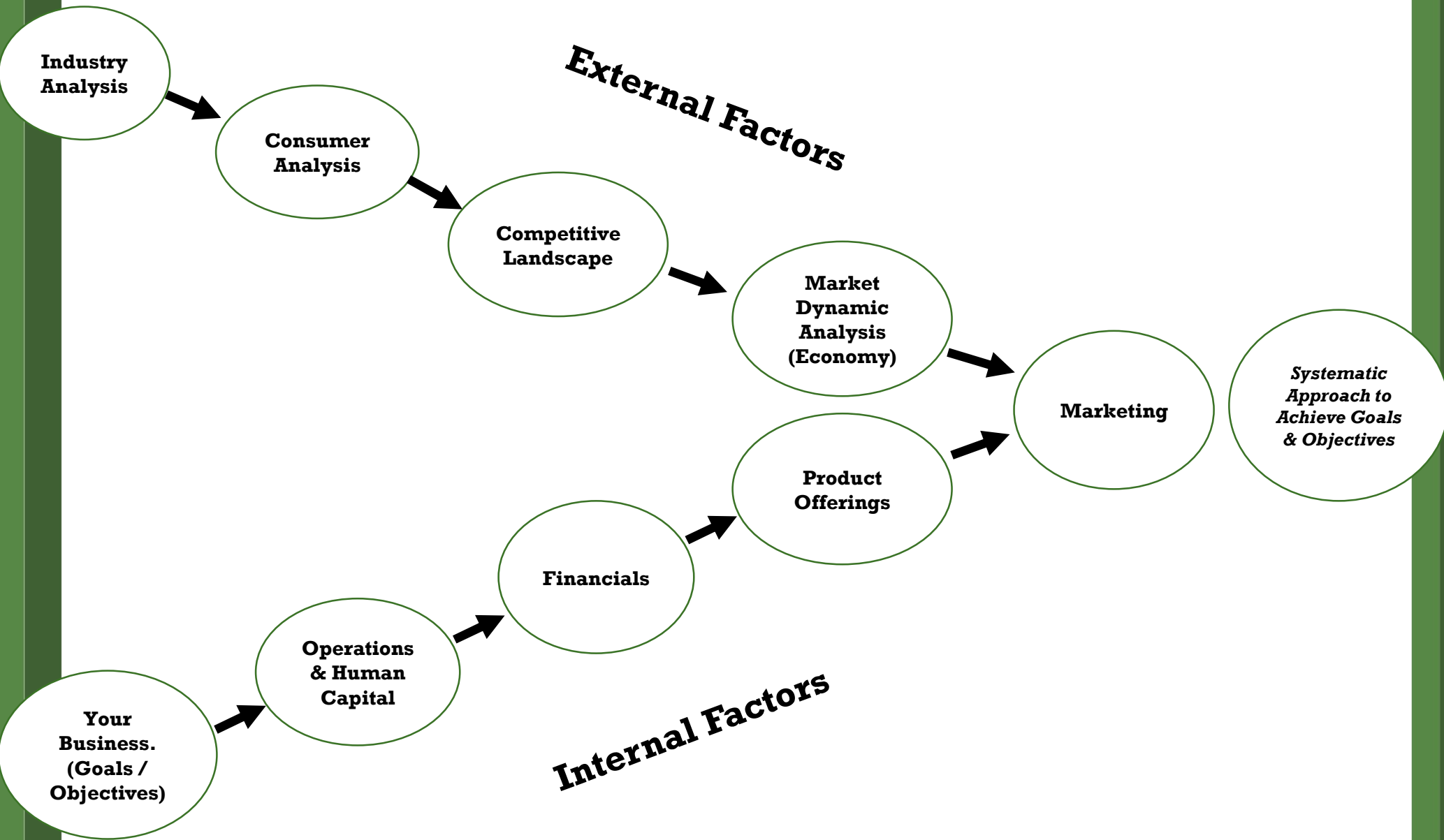




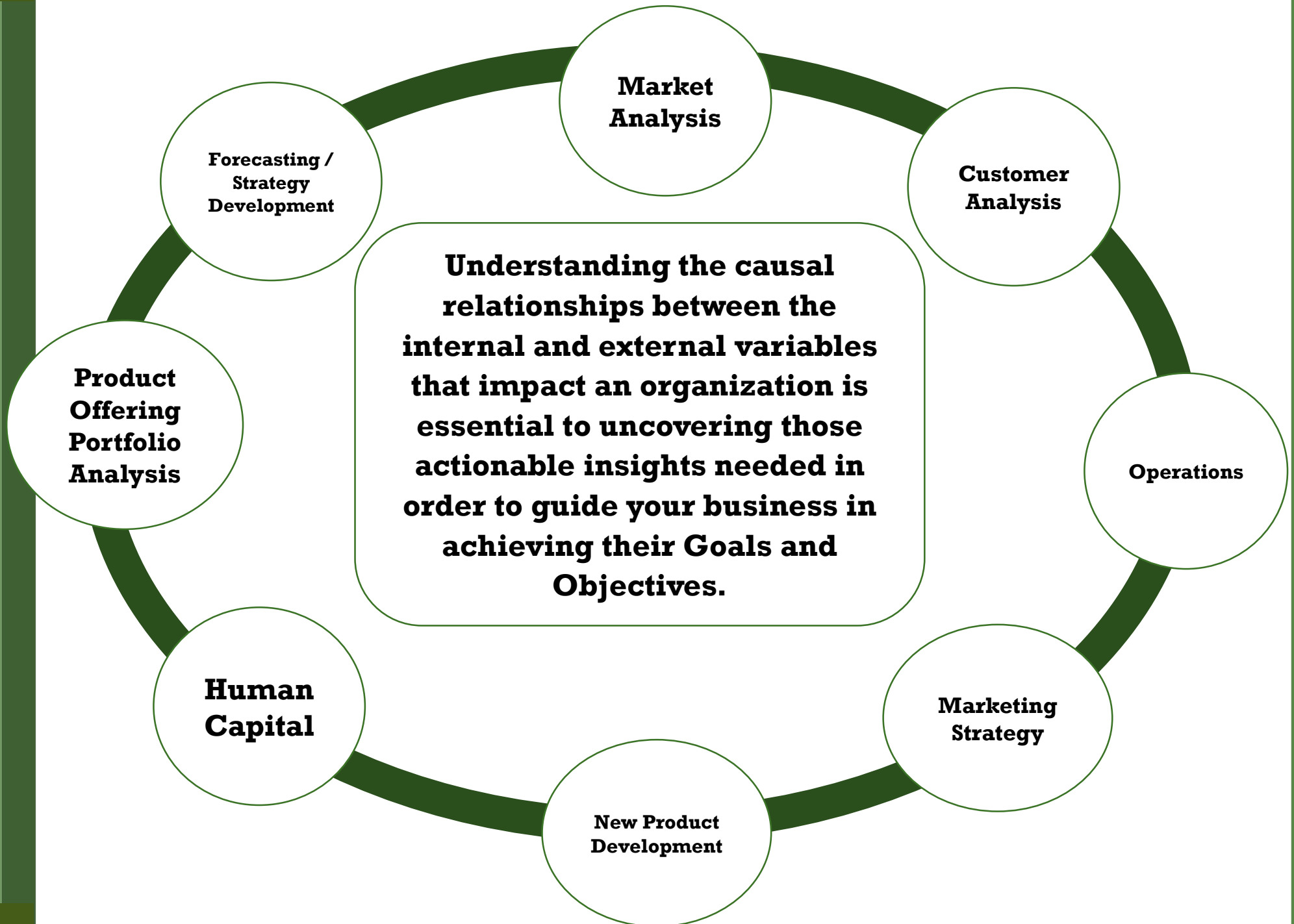
# PROCESS TO DISCOVERY



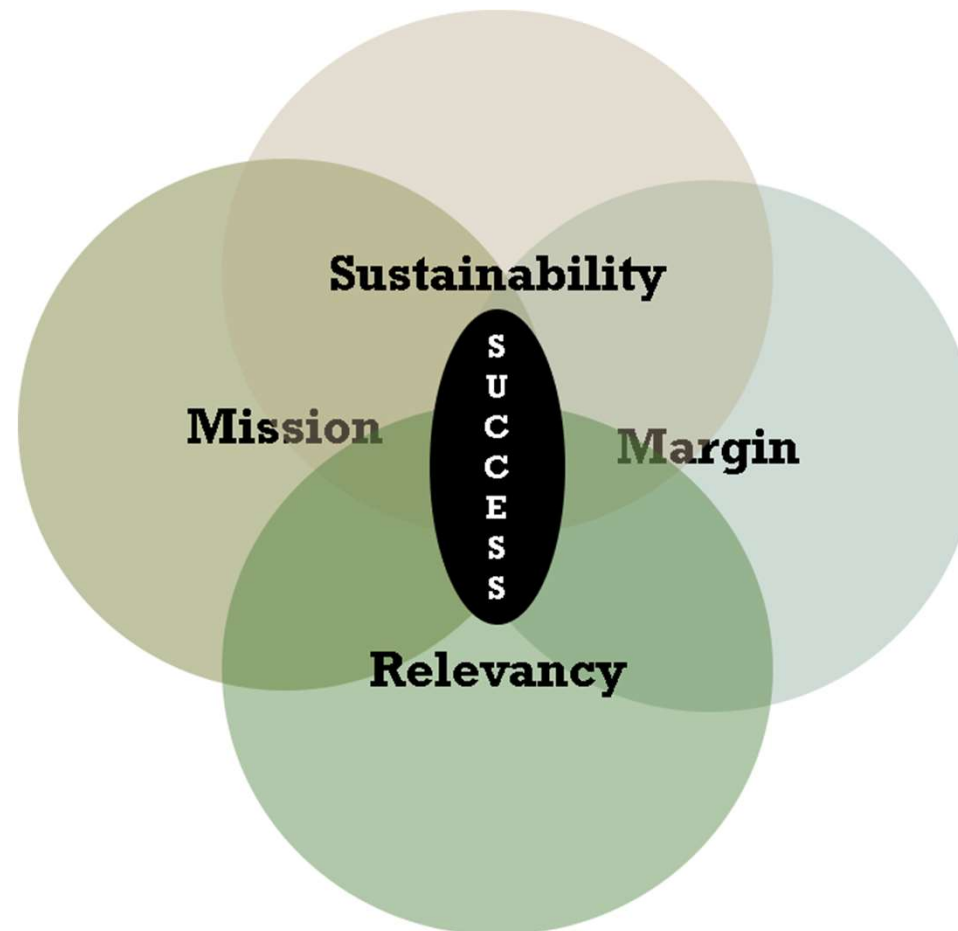
# > PROCESS TO DISCOVERY...



# > Maximize Goals and Objectives:



# SUCCESSFUL BUSINESS FIND THE EQUILIBRIUM OF THESE FOUR FACTORS





# **METHODOLOGY**

## **RESEARCH AND ANALYSIS PARAMETERS**



# BACKGROUND / OBJECTIVES

## **Background:**

Evolution Builders commissioned Greater Than Analytics LLC to support their feasibility and design of a potential recreation community center located in the Roxborough Village Metropolitan Community by offering insights into the wants and needs of the community. A critical component of the analysis is to also assess the potential for additional membership units from the surrounding area to assist in funding the operating expenses associated in running a recreation center.

To support the design, feasibility and acceptance of a community center within this area, Greater Than Analytics LLC outlined a methodological approach that examines both the internal and external variables in a manner to identify both success and areas needed for improvement to support current growth, while a deeper understanding of the Psychology of the market, identifying those unmet needs, or life desires to enhance the design and programmatic elements needed in the new facility to support long-term growth metrics.

## **Core Objectives:**

**Understand current market dynamics impacting current and potentially future membership growth positively or negatively.**

- ☐ Understand the programs, service and amenities the community and surrounding area want and need in a recreation health and wellness center.
- ☐ Understand the psychology of the market, examining variables related to relevancy and sustainability, which include but not limited to, awareness and perception factors, and communities wants and needs both personally and from a health and wellness organization.
- ☐ Understand the intersection of member rate affordability and value that will maximize new member acquisition
- ☐ Identify factors to produce an estimated proforma for managing and maintaining a community recreation center.

# SURVEYING RESIDENTS AND SURROUNDING AREA

## **External / Market Analysis:**

- ☐ *Surveyed Roxborough Village Metro Community (Goal: n=100 Completes - Achieved n=157) Total Responses: n= 236*
- ☐ *Market Landscape Assessment including but not limited to:*
  - *Population Size / Growth Trends*
  - *Population by Core Y Age Groups: Youth, Families, Seniors*
  - *“Like Provider” Assessment*

### *Analytical Notes:*

- *Only one resident per household were survey to ensure data integrity and bias due to household size.*
- *Data analyzed at a 95 Confidence Level*

## **External / Market Analysis:**

- ☐ *Surrounding Community (Goal: n=150 Completes - Achieved n=152) Total Responses: n= 260*
- ☐ *Market Landscape Assessment including but not limited to:*
  - *Population Size / Growth Trends*
  - *Population by Core Y Age Groups: Youth, Families, Seniors*
  - *“Like Provider” Assessment*

### *Analytical Note: Data analyzed at a 95 Confidence Level*

**Analytical Note:** *As there are many factors that can impact an organizations performance, the information provided in this document is to serve as a guidelines to assist in the strategy planning process and it is important to note that modeling cannot predict the future nor account for all of these factors, therefore this document in no way states absolutes of outcome but merely outlines the probably of what might occur if certain conditions are present.*



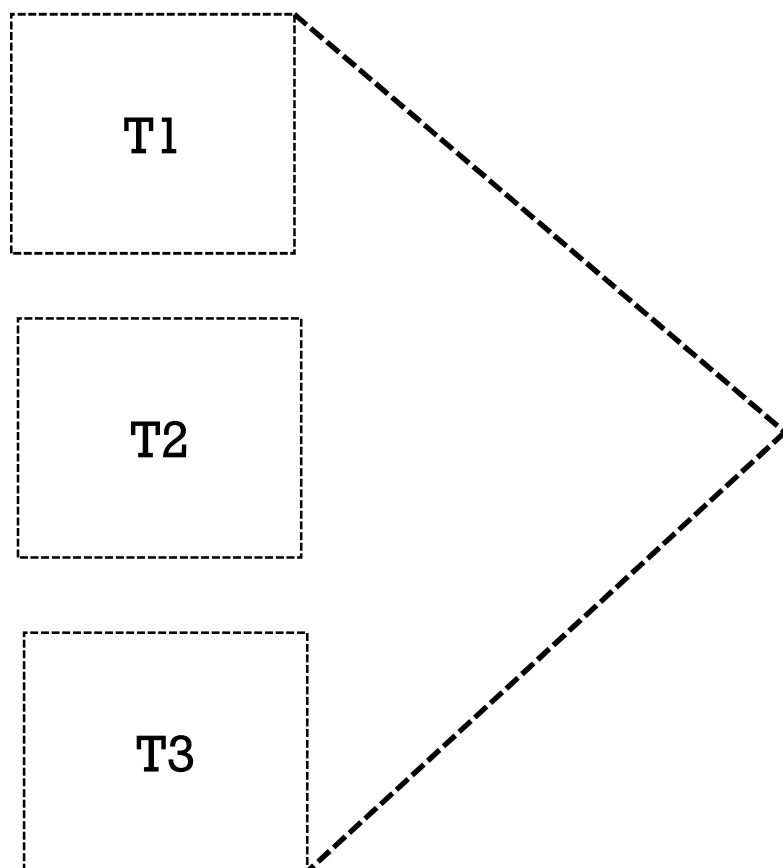
# METHODOLOGY

**Non-Roxborough Resident Respondents following the following sampling criteria to ensure data integrity and avoid response bias.**

**Sample screened to exclude:**

- Those Under 18 years of age
- Having a current Y Membership
- **Employed by any of the following areas**
  - Market Research / Advertising / Consulting Firm
  - Fitness, Gym or Health and Wellness Organization
  - Children, Youth Development, Before and After School or Preschool Operators
  - Non-Profit Organizations
  - Park and Recreation Department
- ☐ Online Methodology used to launch all surveys
- ☐ Survey Length / Time to Complete: 14 minutes to complete the survey
- ☐ Fielding Dates: June 11<sup>th</sup> – July 2, 2020
- ☐ Analysis was performed to ensure a 95% confidence level
- ☐ Additional analysis used to group factors based on statistical significance for additional insights.

## TIERING DATA SETS – VARIABLE PRIORITIZATION SETTING



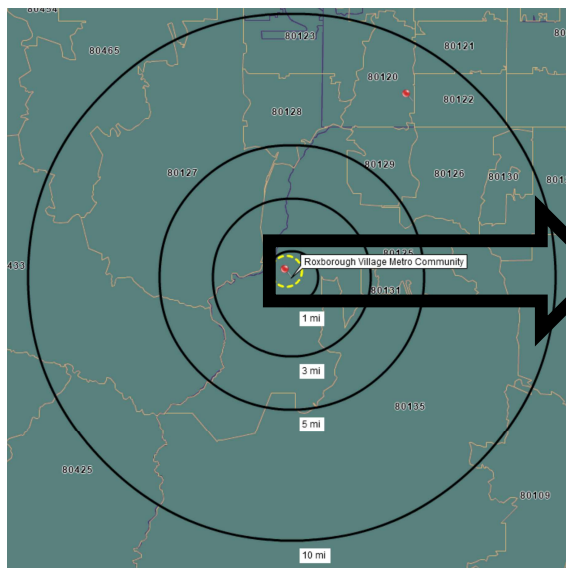
**In order to set priorities based on the wants and needs of the communities in which organizations operate, you must go beyond merely doing a percentage point ranking where appropriate. The T1 – T2 – T3 Tiering System groups attributes based on statistical sig. factors allowing for more strategic, informed decisions can be made.**



# **ROXBOROUGH COMMUNITY**



# ROXBOROUGH VILLAGE METROPOLITAN COMMUNITY



**The area within Roxborough Village Metro Community consists of:**

- 6,000 people or about 2,400 Households.
- 90% indicating likelihood to join / use the facility.

## **Demographic Profile: (based on demographics)**

- The area within a 1-Mile Radius of the community highlights the community has an anticipated growth projection of 6% and 7% respectively.
- More than half (53%) of the households have children under 18 years of age.

## **Population breakdown:**

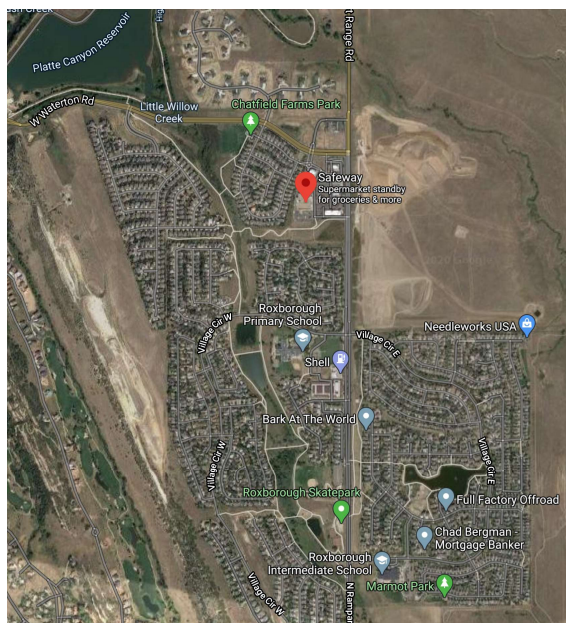
- 11 and under: 25%
- 12 – 17: 9%
- 18 – 44: 25%
- 45 – 54: 14%
- 55 – 64: 7%
- 65+ : 4%

## **Median Household Income: \$104,630**

- Poverty: 3%

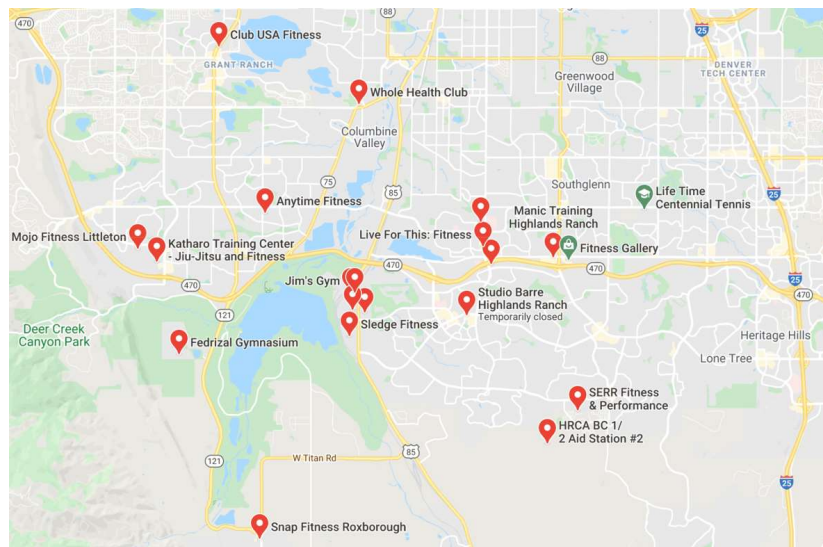
## **Unemployment: about 5%**

- 70% in workforce
- 59% commuting more than 30 minutes to work / 34% commute under 30 minutes.



# RESIDENT CHARACTERISTICS

## Health and Wellness / Fitness Providers



***The children residing within this community are active with only 7% of respondents indicating that their children do not participate in any health and wellness activities stating none-close to home as a primary reason.***

### ***Activities children participate in:***

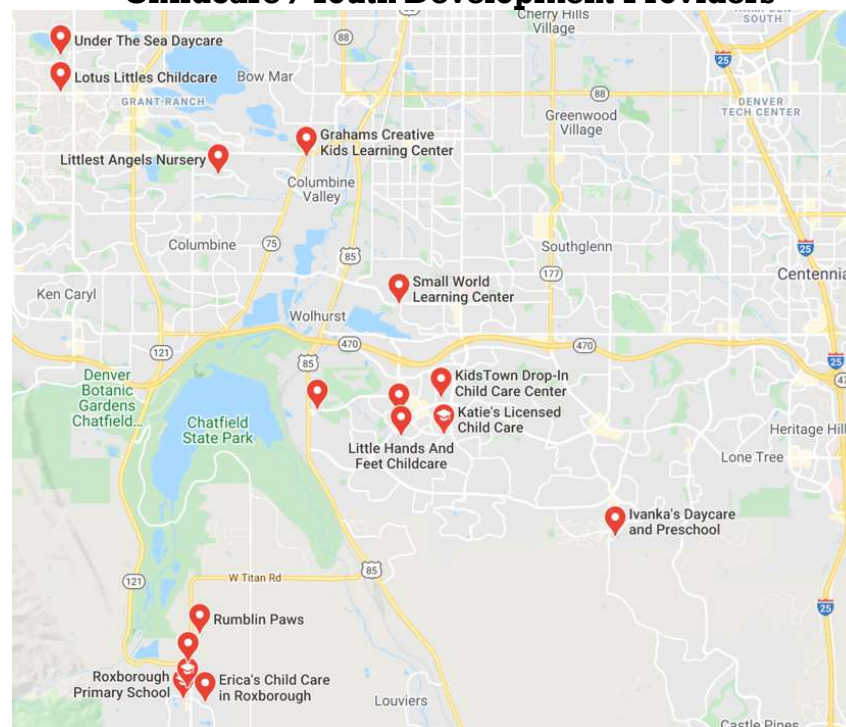
- ***Sports 60%***
- ***Music 31%***
- ***Swim 31%***
- ***Art Class 22%***
- ***Fitness 22%***
- ***Dance 20%***

***Many of these programs are done at the child's school.***

**Overall there are about nine to ten options for fitness and health activities within a 10-mile radius of the location, however almost 2/5 (38%) indicate not belonging to a health and wellness center stating the following reasons as to why:**

- ***No places close to my home (35%)***
- ***No time (11%)***
- ***Too expensive (8%)***

## Childcare / Youth Development Providers





# > REASONS FOR JOINING – AMONG THOSE WITH MEMBERSHIPS at a Health and Wellness organization (ROXBOROUGH VILLAGE) DRAFT

Rank	Among Those with Memberships	Rox Village (n=119)
1	Clean and well maintained	53%
2	Convenient (Close to Home)	41%
3	Indoor Pool	41%
4	Low Price (pay very little but do not need any extras)	40%
5	Up to Date Equipment	29%
6	Friendly / Engaging Staff	23%
7	Great Value (pay more - but you get more)	21%
8	Inclusive (Everyone Welcome)	21%
9	Outdoor Pool	18%
10	Other (Please specify)	18%

63% currently have a membership at a Health and Wellness / program facility

**Selling point for having a community center**

2/5 (41%) joined their current fitness center for an indoor pool – signifies the importance of having this amenity at the rec center

**Factors highlighting an opportunity for a FREE recreation center in their community with both standard and additional amenities to highlight it as a GREAT VALUE**



# **WANTS / NEEDS OF ROXBOROUGH COMMUNITY COMMUNITY REC CENTER**



# PROFILE OF THE ROXBOROUGH COMMUNITY

## ACTITIVES WANTING TO DO MORE AS A FAMILY

**T1**

**58%  
EXERCISE TOGETHER**


**T2**

- ☐ 44% - Spend time together playing games
- ☐ 39% - Eating together outside of the home
- ☐ 37% - Cooking together


**T3**

- ☐ 34% - Trivia / Family Game Night
- ☐ 28% - Eating together at home
- ☐ 27% - Movie at a theatre

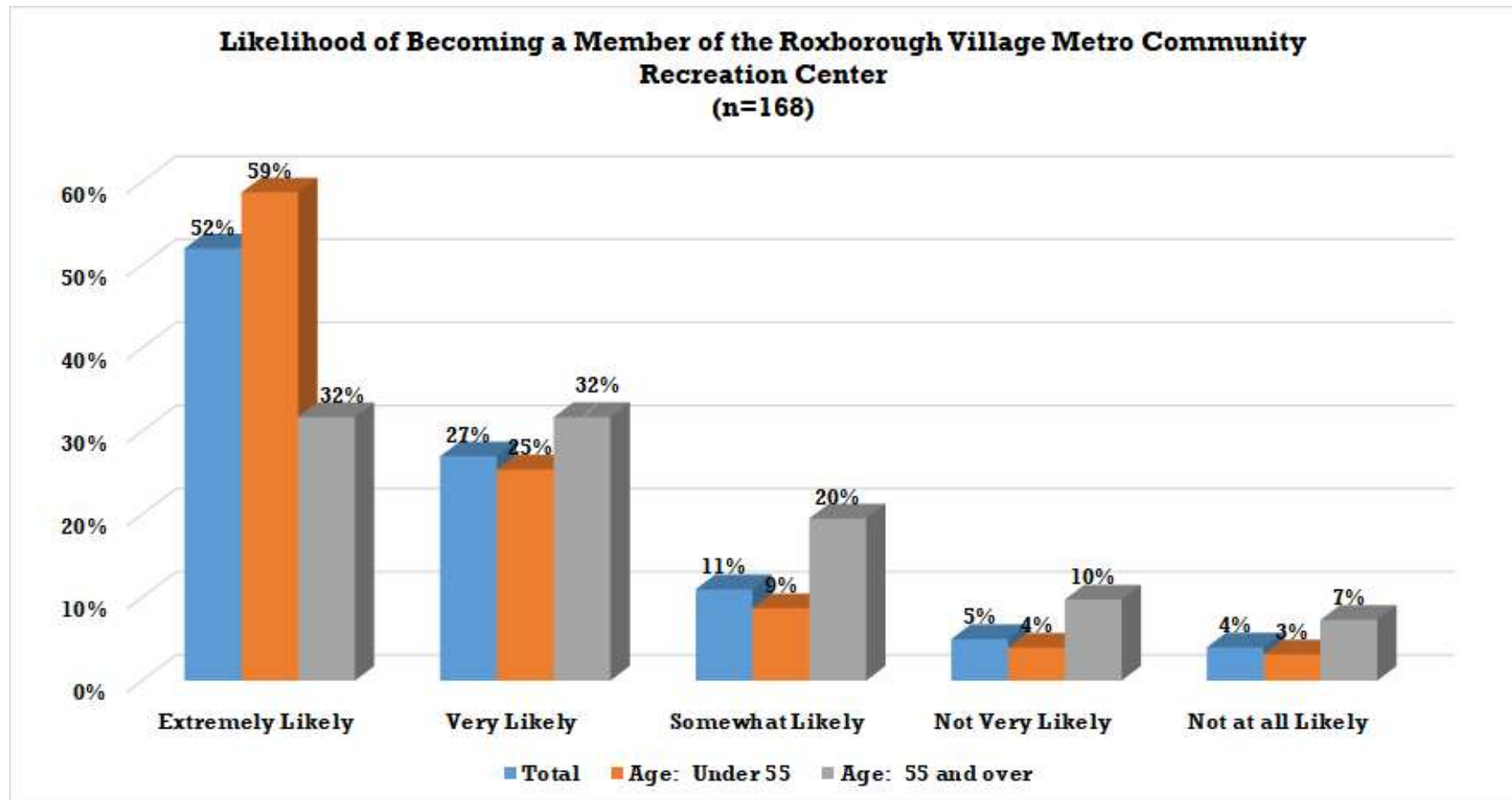


- ☐ Although, exercise is a dominate activity families which they can do more of together, the non-physical activities, that allow people to stay connected is equally important and something to keep in mind when designing the rec center.

- ☐ Another insight that can be inferred beyond the space needed for these types of activities to take place, is the environment, the atmospheric feeling that the space produces. (i.e. warm, safe, comfortable, etc.)



## LIKELIHOOD OF BECOMING A MEMBER (ROXBOROUGH VILLAGE METRO COMMUNITY RESIDENTS)



**Most residents are likely to becoming a member of the recreation center regardless of age.**

# PREFERENCES and AMENITIES DESIRED

**A key preference among 1/3 to just over 2/5 of residences of Roxborough Village Metro Community is having the ability to use the recreation center whenever they want (24/7 Access).**

	Rank	Amenities	Total	Age: Under 55	Age: 55 and over
T1	1	Indoor Pool	68%	69%	64%
	2	State of the art fitness equipment	67%	66%	69%
	3	Outdoor Pool	65%	65%	64%
	4	Family Pool Area (Slides and Games)	58%	63%	44%
T2	5	Gymnasium	54%	60%	33%
T3	6	Lap Pool / Competitive Swim Pool	42%	40%	49%
	8	Playground	36%	37%	31%
	7	Rock Climbing Wall	36%	43%	15%
	9	Kid friendly pool	35%	40%	21%
	10	Large area to socialize and relax (Eating / Gathering Area [bring your own food in to eat with	33%	34%	28%
	12	Game Room (pool table, ping pong, x-box, PlayStation)	26%	27%	23%
	11	Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	26%	24%	33%
	13	Therapy Pool	22%	19%	31%
	15	Smoothie Bar	20%	21%	15%
	14	Snack Shack (Basic Menu of Sandwiches, Snacks and Beverages)	20%	20%	21%
	16	Coffee Depot / Stand	15%	16%	13%
	17	Virtual (VR – technology) Fitness Equipment	10%	10%	10%
	18	Computer Lab / Workstation	7%	6%	10%
	19	Family Room (large TV, comfortable couches and chairs, etc.)	6%	5%	8%

**Overall, the main amenities desired within the Roxborough Community include:**

- Indoor Pool
- State of the Art Fitness Equipment
- Outdoor Pool
- Family pool area (Slides and Games) – Significantly more desired among those under 55 years old

**Tier 2 Amenities desired include Gymnasium (driven largely by those under the age 55)**

**Tier 3 amenities among residents include:**

- Lap Pool, playground, Rock Climbing Wall (driven by those under 55 years old), Kid Friendly Pool and Large area to socialize.

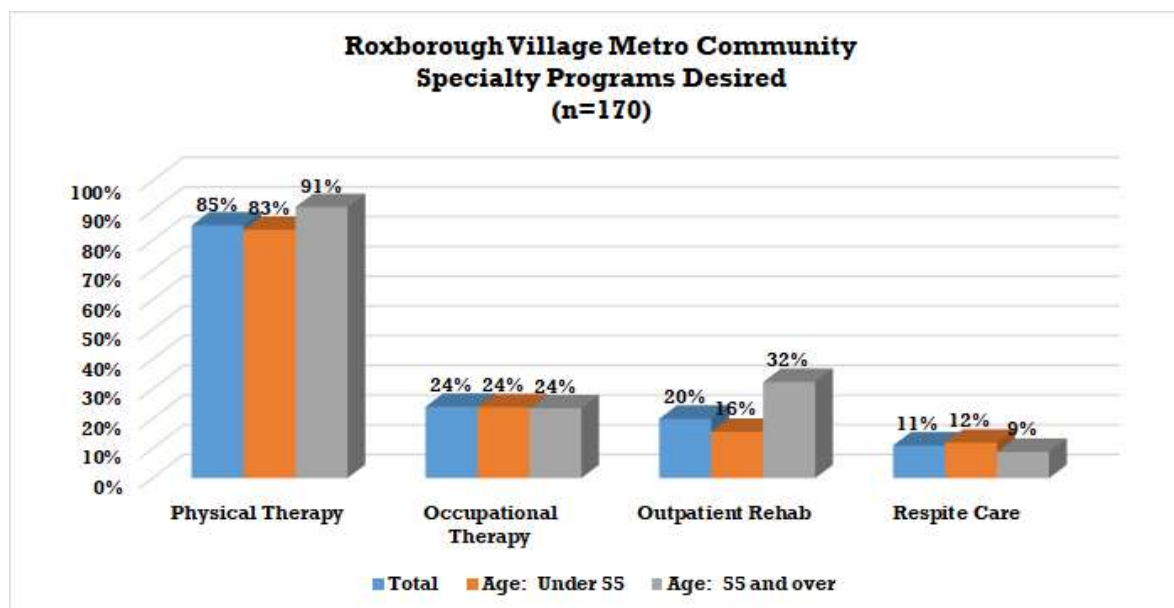
# HEALTH AND WELLNESS & SPECIALTY PROGRAMS

(Roxborough Village Community)

	Health and Wellness Activities	Total (n=172)	Age: Under 55	Age: 55 and over
T1	Group Exercise Classes	59%	64%	41%
T2	Swim Lessons (Adult and Youth)	42%	49%	19%
	Personal Training Options	40%	40%	38%
	Adult, Senior and Youth Aquatic Fitness Programs	37%	34%	46%
	Summer Day Camp Activities	33%	39%	14%
	Weight loss Program	33%	33%	35%
T3	Nutrition Classes	29%	29%	27%
	Family Personal Training Classes	25%	28%	16%
	Senior Specific Fitness Classes	19%	5%	68%

**Overall, Group Exercise classes is significantly desired over other activities tested, largely driven by those under 55 yrs. old.**

**There is a strong desire for fitness programs designed for ALL age groups.**



**Among Specialty programs tested the vast majority, regardless of age desire some sort of physical therapy offering.**

**Significantly more seniors desire an outpatient rehab type program offering.**

# SPORT PROGRAM DESIRED

Overall, the Roxborough Village Metro Community, is an active community and desires multiple activities to be offered in their new recreation center. Below represent the T1 and T2 items (those that were rated significantly higher than others by category). **Note: The vast majority of Seniors are not interested in Sports / Recreation programs.**

<b>ADULT</b> (rating 20% or Greater)	T1	Racquetball, Tennis, Volleyball and Basketball
	T2	Dance, Master Swim, Billiards and Ninja Warrior
<b>CO-ED</b> (rating 20% or Greater)	T1	Volleyball and Tennis
	T2	Basketball, Indoor Soccer
<b>FAMILY PROGRAM</b> (20% or Greater)	T1	Tennis
	T2	Sport Mix, Basketball, Racquetball, Ping Pong Ball, Volleyball, Master Swim
<b>Youth</b> (20% or Greater)	T1	Tumbling, Basketball, T-Ball, Indoor Soccer, Dance
	T2	Ninja Warrior, Tennis, Volleyball, Lacrosse, Master Swim, Sport Mix

# NON-PHYSICAL ACTIVITIES

**Residences of Roxborough Village Metro Community show high interest in Non-Physical activity programs. Identifying those that score T1 and T2 based on statistical significance while achieving at least 20% of residence indicating interest we observe the following based on consumer group.**

<b>ADULT</b> (rating 20% or Greater)	<b>T1</b>	Nutritional Cooking Classes, Art Classes
	<b>T2</b>	Family Fun Night, Book Club, Trivia Game, Spanish Language, Travel Clubs, Music Classes
<b>SENIOR</b> (rating 20% or Greater)	<b>T1</b>	Art Classes, Card Game Club, Travel Clubs, Book Clubs, Computer Classes, Nutritional Cooking Classes
	<b>T2</b>	Family Fun Nights, Spanish - Language
<b>YOUTH</b> (rating 20% or Greater)	<b>T1</b>	Art Classes, Music, Family Fun Night, Basic STEAM
	<b>T2</b>	Ski Clubs, Nutritional Cooking Classes, Computer Classes, Drama Classes, Spanish – Language, Book Clubs

# WILLING TO PAY FOR ACTIVITIES

**Among the residents the rates willing to pay is between \$50 - \$100 / month, which is in line with what those that belong to a fitness / health and wellness center on average pays per month (estimated to be \$90/mo.)**

## Member Type Desired (Roxborough Village Comm) (n=166)

T1 ☐ **Family 2 Adult = 47%**

T2 ☐ **T2 - Adult = 14%**  
☐ **T2 - 2 Adult no Dependents = 14%**  
☐ **T2 - Senior Couple = 9%**  
☐ **T2 - Household = 9%**

*The 2 Adult Family is significantly more desired than any other membership type tested.*

**Among Roxborough Village residents that responded to the survey...  
(n=161)**

☐ **Personal Training: 42% - 58% expressed interest**

☐ **Yoga: 43% - 50% expressed interest**

☐ **Pilates: 26% - 40% expressed interest**

**Note: HITT as a program 29% - 34% expressed interest**

## SPECIALTY ADD-ON'S AND PAYMENTMENT STRUCTURE DESIRED

Top Specialty Programs of Interest		<u>Payment Structure Preferred</u>
<input type="checkbox"/> Personal Training	→	\$10 per class / Pay as you go
<input type="checkbox"/> Yoga	→	All Payment structure of interest
<input type="checkbox"/> Pilates	→	\$10 / class pay as you go & \$30 / mo for 6 classes



# **BEYOND THE ROXBOROUGH COMMUNITY**

Opportunity for Members Beyond the Immediate Area

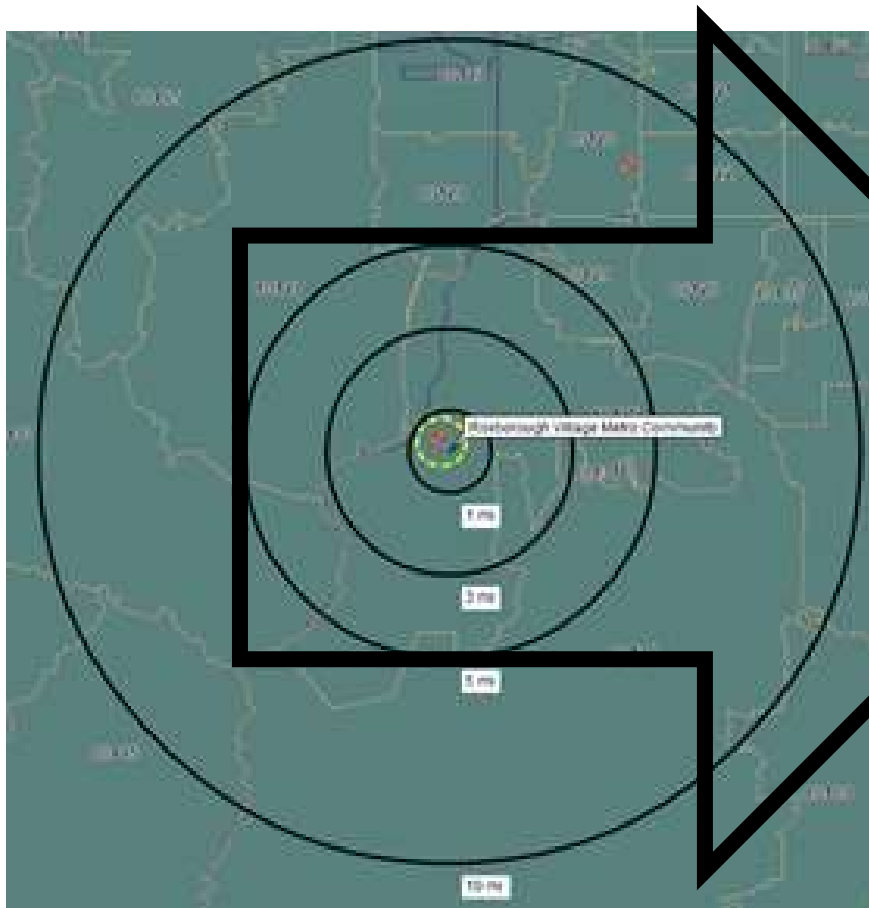




# FEASIBILITY OF SURROUNDING COMMUNITY TO BECOME A MEMBER

DRAFT

**A key part of the strategy and to cover the expenses of running a community recreation center, examining the member enrollment potential beyond the immediate community is a key part of the analysis conducted.**



**Estimating the demand potential within a 5 –Mile radius brings a conservative yet realistic estimation as to what is the most likely expectation for growth will be.**

**2 Important Determinants in the analysis:**

- 1) Typically 65% to 80% of members come from a 5-mile radius of a facility.**
- 2) The further out you go from Roxborough Village the more “like providers” / higher competition.**



# > Market Potential Beyond the Village

(Non-Roxborough Village Metro Comm.)

**Projecting the membership potential in the area is a key first step in examining the viability or additional units and revenue to be gained, however it is not the only step to take into the consideration.**

- 1) **Growth Potential** focusing around the *5-Mile radius surrounding the community*
- 2) Wants and Needs of Community
- 3) Program / Service offerings in alignment with the community Wants and Needs
- 4) Value Factor (Monthly Rates to Benefits Received)

**Barriers / Opportunities to acquiring beyond the operational elements:**

- 1) Brand Awareness and Perception
- 2) Initially Consideration Factors
- 3) Strengths / Opportunities of Brand to increase consideration.

# UNDERSTANDING MARKET SIZE AND TRENDS OF THE MARKET

## ❑ *Community Centers Target Audiences:*

- *Youth – Age 11 and Under (minimum of 12%)*
- *Families / Adults: age 35-64 (minimum of 40%)*
- *Seniors : age 65-74 (minimum of 6%)*
- *HH's with children under 17 (minimum 20%)*



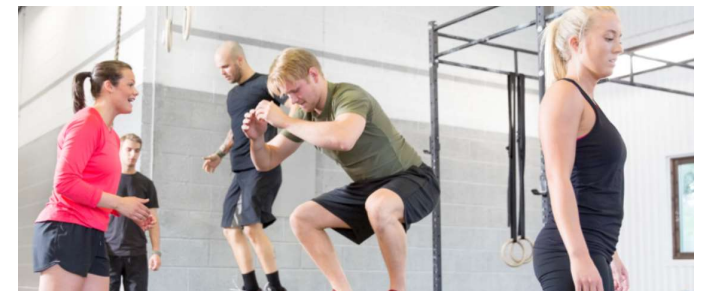
## ■ *Income:*

- *Core Audience - \$30K - \$124K*
- *Narrowing down: \$50K - \$124K*



## ○ *Sub-Set Audiences: [There are situations where these are the primary audiences]*

- *Young Adult (18-24)*
- *Adult (25-64)*



# Demographics – 5-mile radius focus

(Non-Roxborough Village Metro Comm.)

Popoulation	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
2010	7,325	9,460	24,809	278,099
2019	9,003	11,575	29,862	319,798
2024	9,499	12,216	31,443	333,663
Pop. Growth (2019/2010)	23%	22%	20%	15%
Pop. Growth (2024/2019)	6%	6%	5%	4%

Household Population	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
2010	2,422	3,261	8,252	105,415
2019	3,008	4,030	10,040	122,411
2024	3,208	4,299	10,688	128,927
HH Pop. Growth (2019/2010)	24%	24%	22%	16%
HH Pop. Growth (2024/2019)	7%	7%	6%	5%

Family Dynamics	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
Married w/ Children under 18	46%	41%	44%	31%
Single Parent w/ Children under 18	7%	6%	6%	7%
Non-Family w/ Children under 18	0%	0%	0%	0%
Married w/o Children under 18	29%	36%	34%	32%

Age	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
Median Age	32.9	36.4	37	39.1
Aged 0 to 5 Years	13%	11%	10%	8%
Aged 6 to 11 Years	12%	11%	11%	9%
Aged 12 to 17 Years	9%	8%	11%	10%
Aged 18 to 24 Years	4%	4%	5%	6%
Aged 25 to 34 Years	16%	13%	10%	11%
Aged 35 to 44 Years	21%	19%	19%	16%
Aged 45 to 54 Years	14%	16%	19%	18%
Aged 55 to 64 Years	7%	11%	10%	13%
Aged 65 to 74 Years	3%	5%	4%	6%
Aged 75 to 84 Years	1%	1%	1%	3%
Aged 85 Years and Older	0%	0%	0%	1%

1) Examining the overall size and growth of the market are critical first steps in determining the viability / feasibility of demand before surveying the market.

- Overall population and household size and growth is higher than the minimum 3% needed for sustainability.
- The household size is a primary variable to estimate growth, highlighting

2) Half the households surrounding the community have children under the age 18, further emphasizing the need for youth related activities. (note: a core strength of the Y program area)

Overall the age distribution highlights demographics that are aligned with the Y's target audience.

- Age 11 and Under (21%) – min. 12%
- Age 35 – 54 (48%) – min. 40%
- Age 65- 74 (4%) – min 6% (just under the minimum we seek)



# Demographics – 5-mile radius focus

(Non-Roxborough Village Metro Comm.)

Income Characteristics	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
Median HH Income	\$104,630	\$111,561	\$117,055	\$96,799
Average HH Income	\$116,107	\$121,256	\$136,360	\$119,054
Less than \$15,000	1%	2%	2%	4%
\$15,000 to \$24,999	1%	0%	1%	4%
\$25,000 to \$34,999	6%	4%	4%	5%
\$35,000 to \$49,999	11%	9%	7%	8%
\$50,000 to \$74,999	13%	13%	11%	15%
\$75,000 to \$99,999	15%	15%	14%	14%
\$100,000 to \$124,999	14%	14%	17%	14%
\$125,000 to \$149,999	12%	15%	13%	10%
\$150,000 to \$199,999	15%	15%	16%	12%
\$200,000 and Over	12%	13%	16%	12%

2%  
Residing  
in  
Poverty

42%

*With much of the market earning well over \$50K/yr. combined with an extremely low poverty level, the potential for long-term self-sustainability is strong.*

In-School by Type and Grade (Age 3+)	1 Mile Radius	3 Mile Radius	5 Mile Radius	10 Mile Radius
Public (grades pre K - 12)	1,481	1,765	5,594	54,086
Enrolled Public Preprimary	10%	8%	6%	5%
Enrolled Public Kindergarten	9%	12%	11%	7%
Enrolled Public Grades 1-4	30%	28%	25%	27%
Enrolled Public Grades 5-8	21%	19%	28%	31%
Enrolled Public Grades 9-12	30%	32%	30%	31%
Private (grades pre K - 12)	369	436	1,162	9,166
Enrolled Private Preprimary	55%	57%	34%	41%
Enrolled Private Kindergarten	4%	8%	5%	6%
Enrolled Private Grades 1-4	22%	19%	29%	17%
Enrolled Private Grades 5-8	14%	12%	21%	19%

**With 42% of the children within a 5-mile radius in preprimary to 4<sup>th</sup> grade further highlights the potential opportunity / need for afterschool youth development programs**

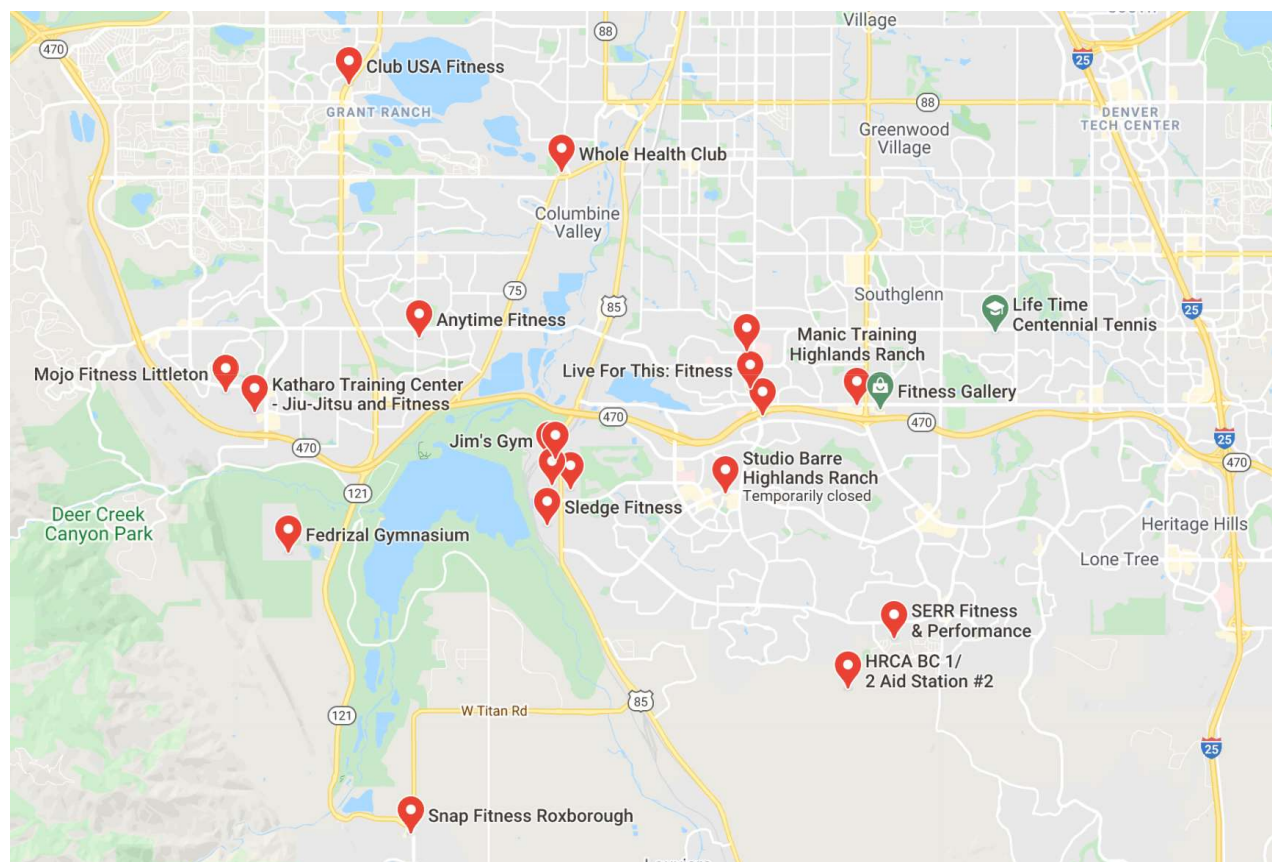


# LIKE PROVIDERS



# LIKE PROVIDERS – ROXBOROUGH VILLAGE COMMUNITY

(Health and Wellness Organization)

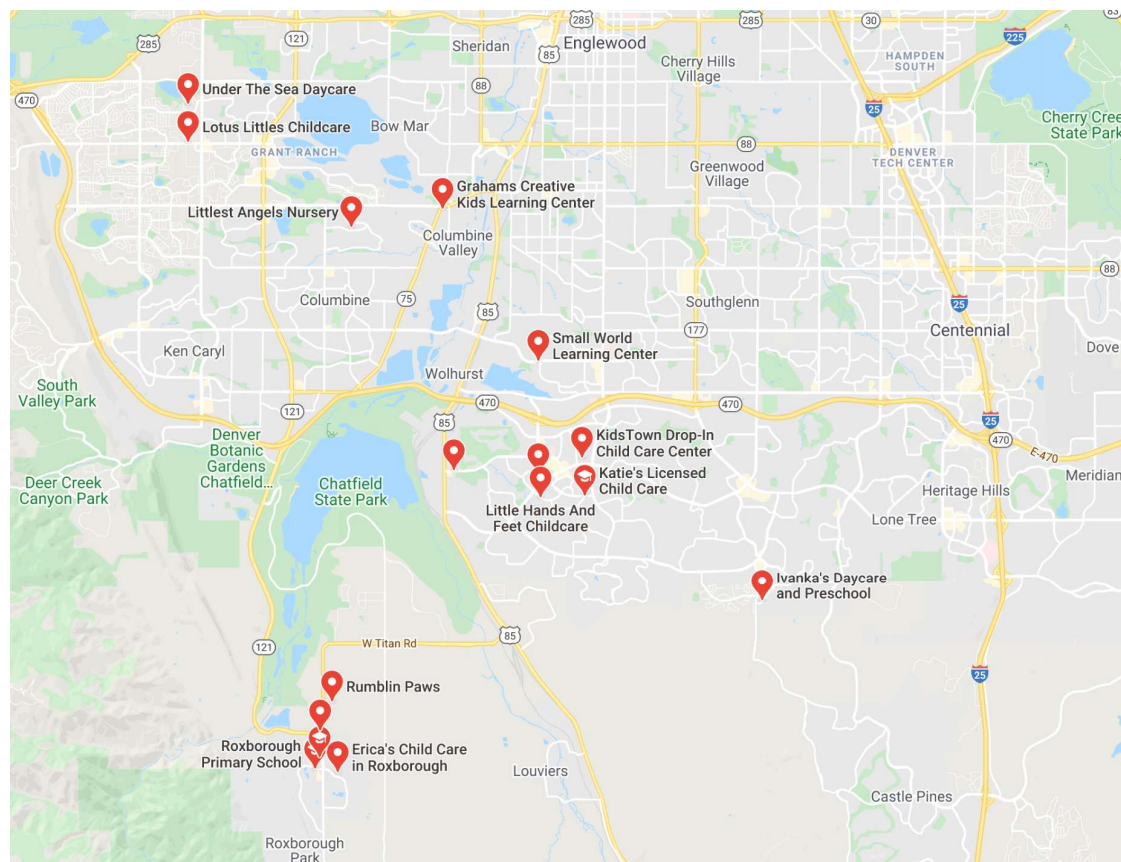


- ☐ **Snap Fitness Roxborough: 6 min. / 1.2 mi.**
- ☐ **Fedrizal Gym: 11 min. / 6.4 mi.**
- ☐ **N'Tense Fitness: 14 min. / 8.9 mi.**
- ☐ **Sledge Fitness: 14 min. / 8.0 mi.**
- ☐ **Redstone CrossFit: 14 min. / 8.4 mi.**
- ☐ **Jim's Gym: 15 min. / 9.0 mi.**
- ☐ **Beyond Fitness and Performance: 15 min. / 8.7 mi.**
- ☐ **Mojo Fitness Littleton: 16 min. / 9.9 mi.**
- ☐ **Studio Barre Highlands Ranch: 17 min. / 10.4 mi.**
- ☐ **Fitness Gallery: 19 min. / 13.9 mi.**
- ☐ **Manic Training Highlands Ranch: 19 min. / 14.4 mi.**

- ☐ **Live for This Fitness: 20 min. / 12.8 mi.**
- ☐ **FIT/ology Fitness Boutique: 20 min. / 13.4 mi.**
- ☐ **Club USA Fitness: 20 min. / 12.0 mi.**
- ☐ **Fitness Tech: 20 min. / 15.1 mi.**
- ☐ **SERR Fitness & Performance: 20 min. / 12.8 mi.**
- ☐ **Whole Health Club: 21 min. / 12.2 mi.**
- ☐ **24 Hour Fitness: 22 min. / 16.4 mi.**
- ☐ **Life Time Centennial Tennis: 22 min. / 16.3 mi.**
- ☐ **Anytime Fitness: 23 min. / 14.2 mi.**

# LIKE PROVIDERS – ROXBOROUGH VILLAGE COMMUNITY

## (Childcare Organization)



- ☐ **Wild Pony Preschool: 1 min. / 0.2 mi.**
- ☐ **Roxborough Primary School: 2 min. / 0.4 mi.**
- ☐ **Erica's Child Care in Roxborough: 3 min. / .6 mi.**
- ☐ **Little People's Landing Learning Ctr: 3 min. / 1.1 mi.**
- ☐ **Little Hands and Feet Childcare: 16 min. / 9.7 mi.**
- ☐ **Rumbly Paws: 4 min. / 1.5 mi.**
- ☐ **Our Village Children's Academy: 13 min. / 8.4 mi.**
- ☐ **Mi Casa, Tu Casa Child Care: 17 min. / 9.8 mi.**

- ☐ **KidsTown Drop-in Child Care Center: 18 min. / 10.6 mi.**
- ☐ **Small World Learning Center: 18 min. / 12.2 mi.**
- ☐ **Littlest Angels Nursery: 19 min. / 11.2 mi.**
- ☐ **Grahams Creative Kids Learning Center: 20 min. / 12.0 mi.**
- ☐ **Lotus Littles Childcare: 23 min. / 13.0 mi.**
- ☐ **Under The Sea Daycare: 24 min. / 13.8 mi.**





# **WANTS AND NEEDS**

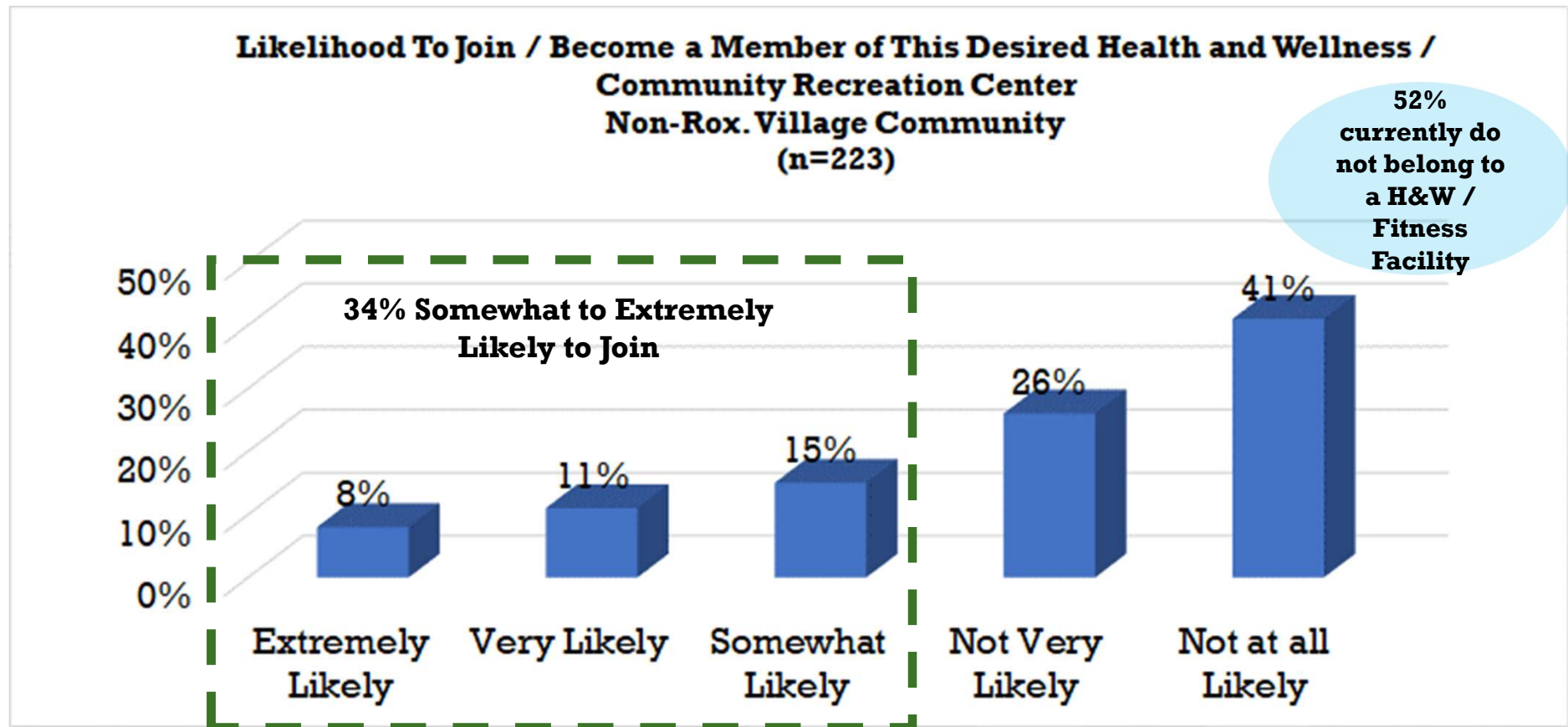
## **ATTRACTING A LARGER AUDIENCE**





## LIKELIHOOD TO JOIN THIS DESIRED IN H&W FACILITY (NON-ROXOROUGH COMMUNITY)

DRAFT



**Important to note that it is difficult for most consumers to conceptualize what a new product will be...we need to touch and feel it, needs to be tangible, so understanding the percentage of those somewhat likely to extremely likely can be used to model market demand potential.**

## PREFERENCES DESIRED (NON-ROXBOROUGH AND ROXBOROUGH VILLAGE COMMUNITY)

Preferences in H&W Facility	Non-Rox. Village Comm. (n=223)	
Convenience (close to home)	69%	<b>T1</b>
Non-intimidating environment	46%	<b>T2</b>
Convenient Parking	39%	
Inclusive / Welcoming to All	39%	
Family Friendly (people of all ages / child friendly)	31%	<b>T3</b>
Adult only (no one under 18 allowed in)	30%	
24-HR Access	28%	
Abundant Parking	23%	
Convenience (close to work)	22%	
Towel Services	17%	
Programs offered outside of Health and Wellness center (your place of work, local parks, schools, universities)	16%	
Access to a National Network of Centers	14%	
Exclusive / Private Club	8%	
Valet Parking	5%	
Other (Please specify)	5%	

*Supports opportunity among those that reside within a 5- Mile radius of the Roxborough Village Community.*

*Similar to the Roxborough Village Community, having the center accessible to all 24 hrs. / day is a draw among outside the community.*

*Parking will be a key factor to attract those outside the Roxborough Village Community.*



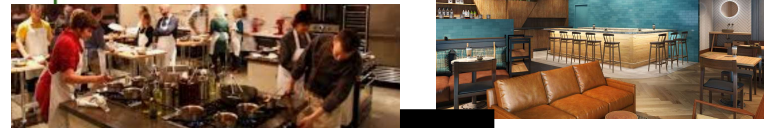
# AMENITIES DESIRED

## (NON-ROXBOROUGH AND ROXBOROUGH VILLAGE COMMUNITY)

Amenities in H&W Facility	Non-Rox. Village Comm. (n=223)	
State of the art fitness equipment	53%	<b>T1</b>
Indoor Pool	48%	
Gymnasium	33%	<b>T2</b>
Therapy Pool	33%	
Lap Pool / Competitive Swim Pool	27%	
Outdoor Pool	26%	
Snack Shack (Basic Menu of Sandwiches, Snacks and Beverages)	25%	<b>T3</b>
Large area to socialize and relax (Eating / Gathering Area [bring your own food in to eat with friends])	22%	
Rock Climbing Wall	21%	
Smoothie Bar	21%	
Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	17%	
Family Pool Area (Slides and Games)	17%	
Coffee Depot / Stand	16%	
Family Room (large TV, comfortable couches and chairs, etc.)	16%	
Game Room (pool table, ping pong, x-box, PlayStation)	16%	
Virtual (VR – technology) Fitness Equipment	16%	
Kid friendly pool	15%	
Playground	15%	
Computer Lab / Workstation	13%	
Other (Please specify)	5%	



**Overall, the Amenities Desired among the Roxborough Residents and the surrounding area are relatively similar, highlighting that no additional accommodations are needed to attract additional people to become members of the recreation center.**



**About 1/5 to 1/4 in both markets express interest in food options as well as a chef kitchen.**

**Food is a key social connector and extends an entity beyond a fitness / h&w center.**

### Rox. Village

	Rank	Amenities	Total
<b>T1</b>	1	Indoor Pool	68%
	2	State of the art fitness equipment	67%
	3	Outdoor Pool	65%
	4	Family Pool Area (Slides and Games)	58%
<b>T2</b>	5	Gymnasium	54%
<b>T3</b>	6	Lap Pool / Competitive Swim Pool	42%
	8	Playground	36%
	7	Rock Climbing Wall	36%
	9	Kid friendly pool	35%
	10	Large area to socialize and relax (Eating / Gathering Area [bring your own food in to eat with])	33%
	12	Game Room (pool table, ping pong, x-box, PlayStation)	26%
	11	Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	26%
	13	Therapy Pool	22%
	15	Smoothie Bar	20%
	14	Snack Shack (Basic Menu of Sandwiches, Snacks and Beverages)	20%
	16	Coffee Depot / Stand	15%
	17	Virtual (VR – technology) Fitness Equipment	10%
	18	Computer Lab / Workstation	7%
	19	Family Room (large TV, comfortable couches and chairs, etc.)	6%

## FITNESS AND HEALTH PROGRAMS DESIRED (NON-ROXBOROUGH AND ROXBOROUGH VILLAGE COMMUNITY)

Fitness and Health Programs Desired in H&W Facility	Non-Rox. Village Comm. (n=223)	
Personal Training Options	39%	<b>T1</b>
Group Exercise Classes	35%	
Weight loss Program	34%	
Senior Specific Fitness Classes	29%	<b>T2</b>
Adult, Senior and Youth Aquatic Fitness Programs	26%	
Nutrition Classes	25%	
Summer Day Camp Activities	17%	
Swim Lessons (Adult and Youth)	17%	
Family Personal Training Classes	13%	
Other (Please specify)	6%	

### Roxborough Village Community

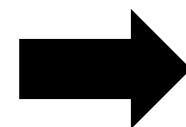
	Health and Wellness Activities	Total (n=172)	Age: Under 55	Age: 55 and over
<b>T1</b>	Group Exercise Classes	59%	64%	41%
<b>T2</b>	Swim Lessons (Adult and Youth)	42%	49%	19%
	Personal Training Options	40%	40%	38%
	Adult, Senior and Youth Aquatic Fitness Programs	37%	34%	46%
	Summer Day Camp Activities	33%	39%	14%
<b>T3</b>	Weight loss Program	33%	33%	35%
	Nutrition Classes	29%	29%	27%
	Family Personal Training Classes	25%	28%	16%
	Senior Specific Fitness Classes	19%	5%	68%

**The main difference between the surrounding community and Rox. Village residents is the desire for swim lessons.**



## SPECIALTY PROGRAMS DESIRED (NON-ROXBOROUGH AND ROXBOROUGH VILLAGE COMMUNITY)

SPECIALTY SERVICES DESIRED IN H&W FACILITY	Non-Rox. Village Comm. (n=223)	
Physical Therapy	73%	T1
Occupational Therapy	20%	T2
Outpatient Rehab	17%	
Respite Care	10%	
Other (Please specify)	13%	



**Physical Therapy is a key interest area among both Roxborough Village residents and the surrounding area.**



# FEE STRUCTURE AND SESSIONS DESIRED FOR SPECIALTY CLASSES (NON-ROXOROUGH COMMUNITY)

DRAFT

Fees and Sessions Desired for Specialty Classes (n=223)	Cross / Circuit Training (HITT)	Personal Training	Pilates	Small Group Personal Training	Virtual Exercise Programs	Virtual Non-Physical Programs	Yoga
\$10 per class - pay as you go	30%	45%	24%	29%	23%	21%	32%
\$30 / mo. for 6 classes	17%	39%	18%	17%	11%	13%	28%
\$60 / mo. for 12 classes	17%	37%	20%	19%	14%	13%	25%
\$80 / mo. unlimited classes	22%	42%	22%	23%	17%	20%	28%



## NON-PHYSICAL PROGRAMS (NON-ROXBOROUGH COMMUNITY n=223)

**Overall, the households outside of the Roxborough Village Community are not as interested in sports and recreation activities, however there is interest in Non-Physical programming.**

**T1 – Non-Physical Classes where at least 20% or greater of the community would like to see offered.**

### Adult

- ☐ Nutritional Cooking Classes
- ☐ Travel Clubs
- ☐ Trivia Games
- ☐ Book Clubs
- ☐ Family Fun Nights



### Senior

- ☐ Computer Classes
- ☐ Nutritional Cooking Classes
- ☐ Travel Clubs
- ☐ Card Game Clubs
- ☐ Trivia Games
- ☐ Family fun nights
- ☐ Book Clubs
- ☐ Language - Spanish



### Youth

- ☐ Family Fun Night
- ☐ Computer Classes
- ☐ Music Classes
- ☐ Art Classes
- ☐ Basic STEAM classes





# **DISC - INDEX**

**DISCRETIONARY INCOME SPEND  
COMPARISON INDEX**





## **> DISCRETIONARY INCOME SPEND COMPARISON – INDEX (DISC)**

**The DISC – Index, developed by Greater Than Analytics LLC, is designed to give organizations an idea of how the members of the communities / market in which they operate spend their discretionary income.**

**The insight derived from the findings, allow organizations to examine their products, programs and services against the rates they charge for these items, to assess the value or differentiation, in what they offer to compel the choice of purchase in their favor.**

**The analysis also provides organizations an glimpse of the “real” choices their consumers face between what we deem “living expenses” (food, health, shelter, transportation and clothing) to those “extras.”**

# DISC (DISCRETIONARY INCOME SPEND COMPARISON)

**Index of  
> 110  
Priced Lower than  
Market**

**Index of  
90 - 110  
Priced on Par  
with Market**

**Index of  
< 90  
Priced on Higher  
than Market**

*Note: Rates Based  
on Littleton Branch*

## BASED ON A 20 MINUTE DRIVE TIME OF

### Roxboroug Village Metropolitan Community

MEDIAN HH INCOME	MONTHLY DISCRETIONARY INCOME (AFTER TAXES)
\$90,345.00	\$5,343.44
<b>AVERAGE MEMBER RATE</b> (Excludes Young Adult')	<b>\$74</b>
<b>Health and Wellness DISC - Index</b>	<b>123</b>
<b>Discretionary Consumer Spending - Index</b> (Excludes Health and Wellness Membership)	<b>239</b>
<b>AVG. TOTAL MONTHLY LIVING EXPENSES:</b> (Food, Health, Shelter, Transportation Clothing)	<b>\$3,497</b>
Non-Essentials / Choice Items:	Average Monthly Expense
Alcoholic beverages	\$40
Going out to Eat	\$249
Entertainment	\$314
Personal care products & services	\$70
Reading	\$5
Education	\$166
Tobacco products & smoking supplies	\$35
Miscellaneous	\$58
Cash contributions	\$124
Personal insurance & pensions	\$695
Gym Membership	\$90
<b>Total Non-Living Expenses - Choice Items:</b>	<b>\$1,847</b>

**Based on the analysis the  
rates of the Littleton Branch  
should work well for this  
community with some minor  
adjustments to boost interest  
and enrollment.**

- ☐ Adult = \$49 (not \$50)
- ☐ Family = \$89 (not \$90)
- ☐ Young Adult = \$32 (not \$35)

### Beneficial to Include:

- Senior Adult at \$46/mo.
- Household at \$92 / mo.  
(although not a huge demand  
today it may work nicely as a  
complimentary membership to  
accommodate changing  
economic times)



# **GROWTH OPPORTUNITY**

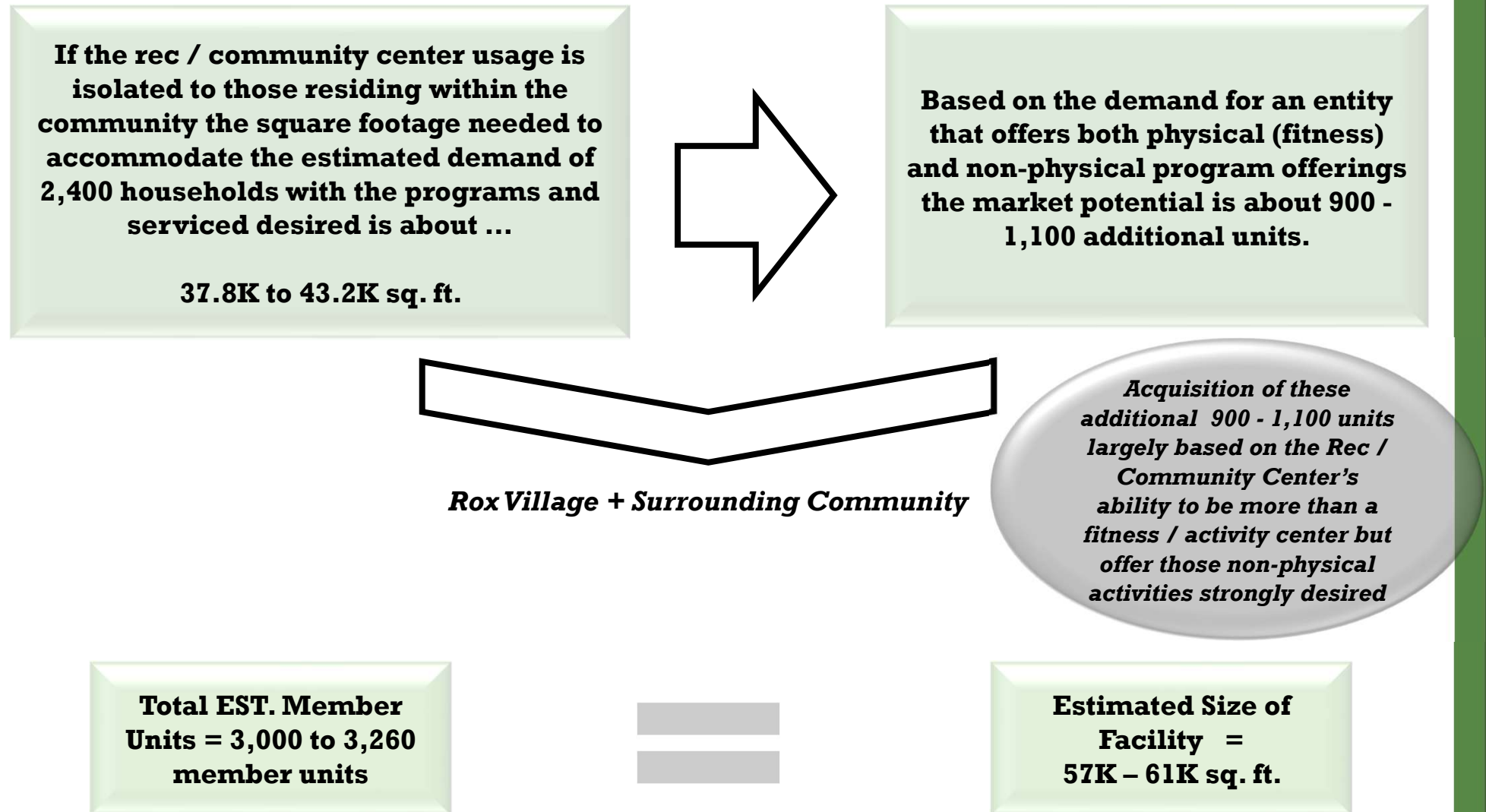
**AREA SURROUNDING ROXBOROUGH  
VILLAGE COMMUNITY CENTER**



**Note: The 5-Mile radius used to predict the growth potential among those residing outside of the Roxborough Village metro community is since Littleton and Southwest is around 12.9 and 15.3 miles respectively from the location and therefore to avoid cannibalization or overlap in new member acquisition this 5 - mile radius was used.**

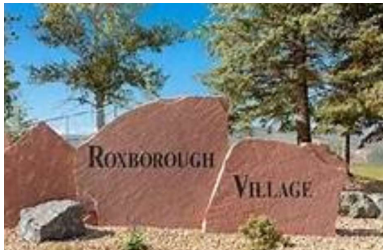
# ESTIMATED PROJECTIONS – WITHIN AND BEYOND THE ROXBOROUGH VILLAGE METRO COMMUNITY

DRAFT



**Estimated member revenue based on unit projections (900-1,100) from the surrounding community and an average rate of \$62/mo. (adjusted based research and DISC-Index assessment) to be between \$669K - \$818K/yr. Additional revenue can be earned through specialty programs and activities offered.**

# SUMMARY & INSIGHTS





# SUMMARY

Overall, there is strong interest among those residing within and outside the **Roxborough Village Community**, with an estimated total member unit to be achieved in the area of 3,300 member units. However, to achieve this level of interest the market indicates needing something more than a standard fitness and recreation activities, but rather something that offers non-physical activities and space and activities that prompts social interaction (importance of food as a key social conduit) and re-connecting with family, friends and acquiring and maintaining relationships.

## Demographics:

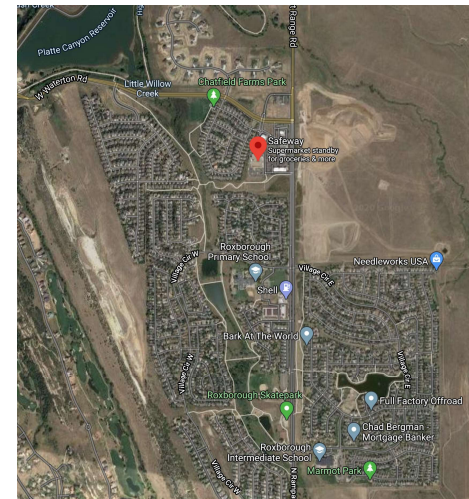
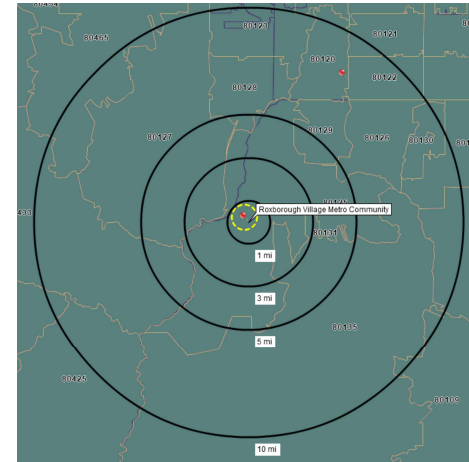
Overall, the Roxborough Village Metro Community as well as the surrounding area of the neighborhood presents optimal conditions for a community recreation center to exist.

- Community Specific: about 2,400 households with approximately 6,000 people residing in the community.
- Additional growth is expected expanding the audience to a 5-mile radius
  - 25,443 people or 8,000 households
  - In addition to the size of the market the characteristics of the market align nicely to support and sustain a recreation / community center:
    - Strong Family population (50% have children under 18)
      - 21% of population are age 11 and under
      - 42% grades Pre-K – 4<sup>th</sup> grade (indicator of youth programming)
    - Higher Income Community Median HH Income: \$117K / yr.
      - Less dependent on grants, donations for sustainability

**Although Exercise / Fitness is important to the community (58% indicating wanting do more of this with family, having a place to spend time with family and friends playing games, eating and gathering and socializing is a critical component to their well-being also.**

## Indicators that residents are looking more than a GYM:

- Slightly less than 2/5 (38%) of the market do not currently belong to a gym / or fitness center. Among them 35% indicate “No place close to home” as a dominant reason why. This finding also indicates that although there are about 10 fitness / gym providers within a 20-minute drive time, these facilities may not offer these additional non-physical programs / services that the community is seeking.



# SUMMARY

DRAFT

## Preferences for the new facility include:

- Non-Intimating, Inclusive and Welcoming Environment
- 24 hr. access
- Parking

## Amenities:

There are slight shifts in amenities desired between the Roxborough Community and the surrounding area, however the two dominant amenities include:

- State of the art fitness equipment and pools, indoor pool specifically are the highest desired amenity indicated among respondents. Family Fun pool area is desired especially among the Roxborough Village Community.
- **Additional Amenities include:**
  - Food Options and Chef Kitchen (key social connector / slow down for family / friends)
  - Gymnasium
  - A place to socialize

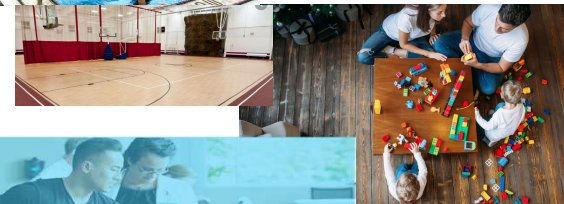
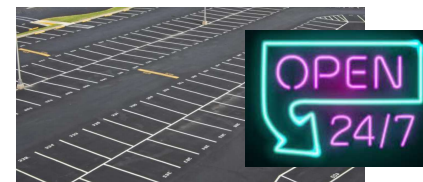
## Program Specific: [additional revenue options]

- The standard activities are desired include: Group Exercise, Weightloss and Nutrition options. Specialty (fee-based programs) Personal Training, Yoga, Pilates and Personal Training

The importance of **LEARNING**, **GROWING** and **CONNECTING** through a variety of activities such as: Nutritional Cooking, Travel Clubs, Trivia Games, Book Clubs, Family Nights, Card Games, Music, Art and STEAM related classes.

## Pricing through a Value and Differentiator Prism:

- Overall, to attract the surrounding area to joining this recreation center an average member rate of \$74 / mo. appears to be in range for the area
- Since the area offers fitness / health and wellness options and the environment / geography itself lends itself to health and wellness activities, it is critical to offer something different and of **VALUE** that the community cannot easily find elsewhere and are willing to pay for it.





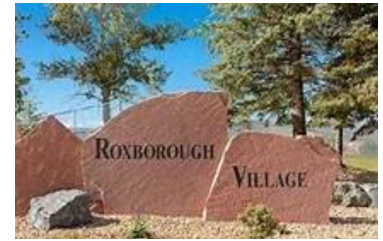
# EXECUTIVE SUMMARY

## Closing:

In closing, there is sufficient evidence that the Roxborough Village Metro community desires a community recreation center to be built within their neighborhood. There is also sufficient interest with the surrounding community to join and use such a recreation center that offers an abundant of physical and non-physical programming with an indoor pool option being at the top of the list among amenities offers along with 24-Hr access and sufficient parking as key preferences.

Expanding the usage to those outside of the community will bring in about \$669K - \$818K of additional revenue per year solely from membership dues, with additional revenue to be earned through other fee-based programming and services offered.

To attract awareness to this new recreation option in the area, marketing will be a critical component to not only generate awareness but to highlight that it offers more than merely exercise or fitness related activities a key need in the community itself.





**THANK YOU**



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