

**JESUP, IOWA  
WELLNESS & FITNESS CENTER**

**MARKET STUDY AND  
PARTICIPATION POTENTIAL**

**APRIL 2014**

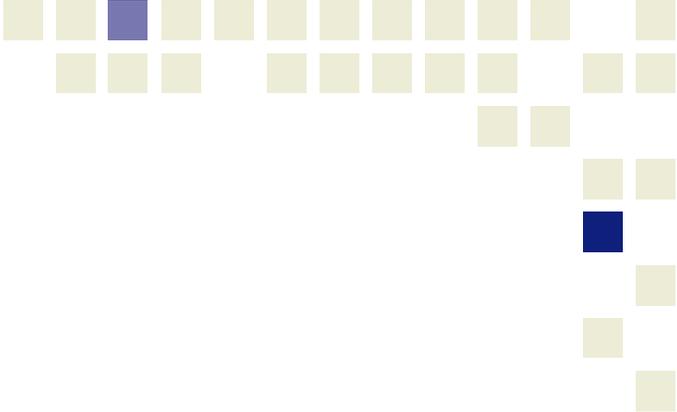
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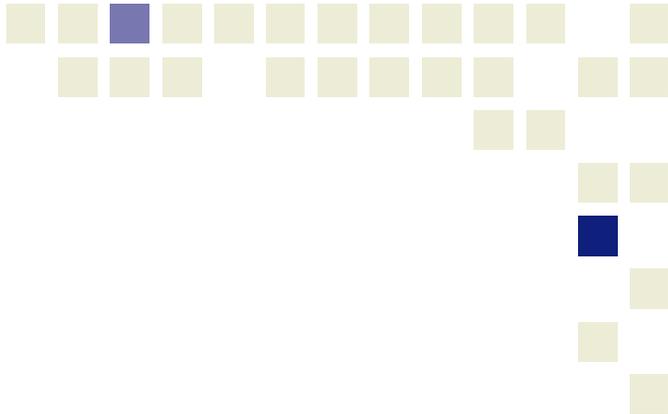
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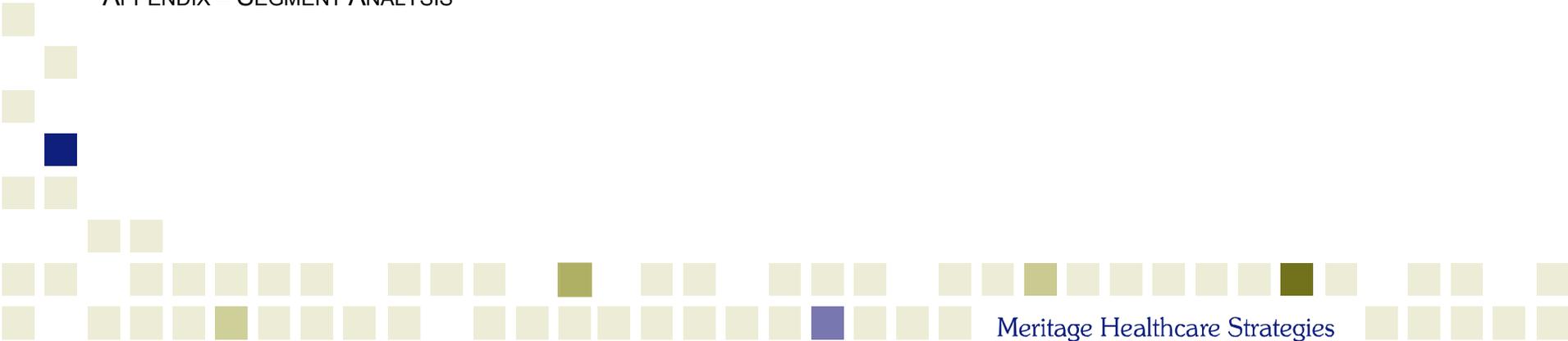




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APPENDIX – SEGMENT ANALYSIS



# ***EXECUTIVE SUMMARY***

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## **INTRODUCTION**

The City of Jesup, Iowa, (“Jesup”) is interested in developing, sponsoring and providing a community wellness and recreation center (the “Center”) in Jesup. The community currently has limited facilities for indoor recreational activities and no functional aquatic center. The Jesup Community School District has been administrating a summer recreation program for the community with financial support from Jesup. The need to develop an active parks and recreation department together with constructing facilities such a recreation center and aquatic center has been identified in the City’s comprehensive plan. More recently, a citizen’s group brought forth a petition to the City Council requesting increased recreational facilities. In January 2014, Power Wellness Management, LLC (“Power”) was engaged to develop a feasibility study and business plan for the proposed Center, and partnered with Meritage Healthcare Strategies, LLC (“Meritage”) to perform this work.

## **MARKET ASSESSMENT**

The scope of work conducted by Meritage to conduct the feasibility study includes:

- Clarify Vision and Project Objectives
- Interview Key Stakeholders
- Conduct Town Hall Meetings with Jesup residents
- Conduct Internet-based Community Interest Survey
- Analyze Market Demographics
  - Estimate Fitness Member Profile and Potential
  - Estimate Recreation Participation Potential
- Obtain/Analyze Trends for Participation at Existing City Recreational Venues
- Conduct Analysis of Fitness and Recreation Providers
- Evaluate Potential Sites
- Produce Feasibility Report of Findings
- Present Power Point Presentation of Findings

## **VISION FOR CENTER**

The initial vision for the proposed Center is to serve unmet community recreational and fitness needs with indoor amenities and programs, as well as providing meeting space(s) for community events and activities. Desired facilities include aquatics, gymnasium, exercise equipment (cardiovascular and strength training), free weights, indoor track, multipurpose rooms, and kitchen. The City also recognizes a need for some health services within the community, and would like to align with a healthcare provider or providers to serve this unmet need.

## ***EXECUTIVE SUMMARY***

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### **MARKET ASSESSMENT & MEMBER POTENTIAL**

#### **Economic Environment:**

The national jobless rate was 6.6% in January 2014, lower than the average for this decade of 8.6%, but higher than the 60-year pre-recession average of 5.6%. Unemployment appears to have increased during and immediately after the recession, reaching a high of 8.3% in Buchanan County and a high of 7.9% in Black Hawk County in late 2009, then steadily dropping to 6.1% in Buchanan County and 5.4% in Black Hawk County by December 2013, which is lower than the national average, but is still higher than pre-recession rates for this area.

#### **Primary Market Definition:**

Nationally, consumer surveys have shown that fitness consumers consider 8 minutes drive time to be “very convenient”, and consider 12 minutes drive time to be “somewhat convenient”. In less populated markets, fitness consumers will tolerate 15 to 20 minutes time in some cases, with 20% of the consumers often living more than 20 minutes drive time. However, in determining the market area for the Center, 15 minutes drive time extends to the eastern edge of Waterloo. Meritage believes that residents of Waterloo and the surrounding area will be more likely to utilize fitness centers in the Waterloo market area, rather than drive to Jesup. Therefore, Meritage recommends the Primary Market for a Center in Jesup is contained within a 7 mile radius of the Jesup Community School District. The following summarizes the demographics of the population within that radius.

#### **Market Demographic Attributes:**

Trends in fitness participation nationally indicate the consumers are no longer primarily young body-builders and aerobics patrons, but now include an older group (baby boomers) interested in mitigating the impacts of aging and improving their overall health. Individuals that are older, and those with higher income levels, higher levels of education and white collar employment are generally more likely to support a medically integrated fitness model over a traditional health club. The age 55 plus segment has traditionally not been targeted by commercial fitness clubs, and the national fitness chains have not effectively served this group. According to studies conducted by IHRSA (International Health & Racquet Sportsclub Association), more than 50% of members nationally are now from households with \$75,000 plus household incomes; in fact, 40% of all members report household incomes of \$100,000 or more.

The population within the Primary Market Area (7-mile radius from Jesup Community Schools) is approximately 5,500, and is expected to increase 1.9% by 2019. There are approximately 2,100 households within the Primary Market Area, of which 35.7% have children under the age of 18 years, higher than the national average of 33.5%. The median age is 37.9, which is comparable to the national median age of 37.7. The market has a higher marital status than the national average. The rate of home ownership is also higher than the national average within the Primary Market Area. The median income for a household in the Primary Market is \$64,707, well above the national average, especially after adjusting for the lower local cost of living. Seven in ten residents aged 16+ are employed in the work force, higher than the national average of 64.3%. Educational achievement and white collar employment are both below national averages. Work commutes are shorter than the national average. Higher incomes usually indicate higher participation rates, while lower educational achievement and white collar employment usually indicate lower participation in fitness membership. Shorter commutes may indicate more time available to pursue recreation and fitness participation.

## **EXECUTIVE SUMMARY**

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### **Member Potential:**

Based on historical metrics, Meritage recommends the proposed Center is sized for approximately 550 monthly fitness members in the Primary Market. This estimate does not include the non-traditional consumers who might participate if a medical integrated fitness model is adopted, or those intermittent users of recreational facilities. Within the recommended consumers, Meritage estimates that there are approximately 419 basketball participants, 111 volleyball participants and 172 aquatic exercise participants within the Primary Market, although these estimates include duplication with fitness member estimates. Given the proximity of communities like Dunkerton, Gilbertville, Raymond and Fairbank which fall outside the 7 mile radius, the Center may be able to draw an additional 20% participation from these communities.

### **Fitness Competition:**

Meritage conducted a competitive analysis of fitness and recreation centers within Jesup, Independence and Waterloo. Although the secondary market areas, especially Waterloo, are well served by a variety of traditional commercial and municipal fitness centers, Jesup does not currently have a comprehensive fitness center provider. The following fitness facilities were visited by Meritage:

- **Jesup:** Jesup Gym and Average Joe's appear to have each captured a loyal following, but facilities and programming are limited and we understand these facilities have captured about 100 regular participants each (some of which might be the same individual using both facilities).
- **Independence:** Four centers are estimated to have captured about 1,150 participants. Although these centers fall outside the Primary Market, they may compete for participants on the eastern edge of the Primary Market.
- **Waterloo:** Nine centers are estimated to have captured approximately 13,250 participants, most of which are not residents of Jesup or the Primary Market. Although these centers fall outside the Primary Market, approximately 75% of employed Jesup residents commute to Waterloo or other communities for employment and may find these facilities relatively convenient. Research indicates that fitness participants prefer a location close to home over close to work; this creates an opportunity for Jesup to capture some of these participants Primary Market.

## **SURVEY FINDINGS**

### **Respondent Profile:**

Respondents to the survey were largely female (71%), between the age of 25 and 44 (58%), residing within zip code 60548 (92%), and residing within the Jesup city limits (76%). Approximately one-third (32%) of respondents currently belong to a fitness center.

### **Likelihood to Use the Proposed Center:**

Overall, more than nine in ten (92%) of respondents indicated a likelihood to use the proposed Center, with 79% indicating they are very likely to use the center. Among those likely to use the proposed Center, pricing acceptance ranged from 37% for the highest price points (\$50 for Individual, \$80 for Family and \$40 for Senior Adult) to 60% for the lowest price points (\$40 for Individual, \$60 for Family and \$20 for Senior Adult).

## ***EXECUTIVE SUMMARY***

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### **Likely Utilization Patterns:**

Respondents report the highest likelihood of use the Center after 5 pm on weekdays (65%) and on weekends (61% on Saturdays and 53% on Sundays). These utilization patterns are consistent with industry norms and with the also reflective of the high percentage of residents in the workforce and the percentage commuting to Waterloo or other communities for employment.

### **Preference for Various Center Amenities:**

Respondents rated a gymnasium, exercise equipment, outdoor recreational pool and a fitness activity area for children as the most important features, followed by group exercise classes and professionally credentialed staff. These rankings are consistent with fitness industry norms for recreation centers and fitness centers. No significant variances were noted by type of respondent.

### **Preference for Various Programs & Services:**

Open gym time for fitness and recreation, and programs for children were rated as the most important program offerings. These preferences are consistent with industry norms for recreation centers.

### **Preferences for Location:**

The respondents indicated that accessibility by bicycle or by foot were the most important criteria. Close to school or near the center of town were more important than being close to either the soccer complex or the golf course.

## **POTENTIAL PARTNERS**

Planning team members have identified several key groups as potential partners in the development of the Center. These groups include the City (parks and recreation), the School District, area hospital(s), area educational institution(s) of higher learning and major employer(s). Although the primary motivation of residents appears to be recreational in nature, there is also an interest in promoting good health and wellness, social opportunities and other activities. These potential partners identified will be targets for further exploration in the next phase of work.

## **MEDICAL INTEGRATION OPPORTUNITIES**

Our research indicates that some residents in any community will feel intimidated to exercise in a typical fitness or recreation center. We know that healthcare affiliation lends credibility and an aura of safety, thus reducing the intimidation factor many have when it comes to fitness centers. Several healthcare providers were mentioned as potential targets for affiliation.

## ***EXECUTIVE SUMMARY***

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### **PRELIMINARY ESTIMATE OF MEMBER BASE AND RECREATION PARTICIPATION**

Based on our analysis of the density and demographic makeup of the market as well as results of our online survey, we believe that the proposed Center could capture 550 monthly participants plus an additional 85-100 day pass participants from the Primary Market area and potentially an additional 15%-20% from outside the Primary Market. Additionally, we believe that the recreation and sports programs may be expanded due to availability of indoor space for winter utilization. To maximize the revenues and participation by the community, we recommend the lowest pricing tested for membership (\$40 for Individual, \$60 for Family and \$20 for Senior Adult) and an \$8 rate for day passes for "open" center utilization (excluding leagues, clinics, and other programs which have a program fee associated).

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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### **PLANNING TEAM**

Meritage met with the Jesup Wellness Center Planning Team by phone on February 4, 2014 and onsite on March 11, 2014 to discuss the parameters of the vision, goals and objectives of the proposed Wellness Center. The Planning Team is comprised of the following individuals:

<b>Name</b>	<b>Position</b>
Dave Bishop	Mayor, City of Jesup
Chris Even	Director , Public Works
Melissa Trumbauer	City Council Member & Recreation Committee Chairperson
Darren Engbretson	City Council Member & Recreation Committee Member
Todd Rohlfen	City Council Member
Marsha McGlauglin	City Council Member
Jill Chemen	City Council Member
Luke Baldwin	Jesup School Board Member

### **STAKEHOLDERS**

In order to obtain a broader base of opinions and perceptions regarding the development of the proposed Wellness Center, Meritage conducted interviews on March 11 – 12, 2014 with additional “stakeholders” beyond the Planning Team. The stakeholders were identified as key representatives of the community, whose opinions and perspectives could possibly influence the overall direction of the proposed Wellness Center. Below is the list of stakeholders interviewed:

<b>Name</b>	<b>Position</b>
Cylvi Gary	Director, Winding Creek Meadows Assisted Living Facility
Jeremy Larson	Plant Manager, Prinsco
Nathan Marting	Superintendent, Jesup Community School
Josh Zuck	Community Recreation Director, Jesup Community School
Rick Kayser	Jesup School Board Member
Rex Reinhart	Owner, Jesup Gym Equipment
Nate Clayberg	Director, Buchanan County Economic Development
Mark Collett	Owner, Bloom Manufacturing
Roger Hershberger	Retired Businessman
Kristin Steinbron	Owner, Average Joe's
Jacie Gray	Director, Bertch Wellness Center (Waterloo)

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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The following is a summary of key thoughts, suggestions and comments expressed by the Planning Team and Stakeholders. Items are not listed in order of priority or preference, except where noted.

### **Goals and Objectives:**

- Accommodate youth practices and activities
- Promote healthier, more active, involved residents
- Conducive to people of all ages
- Provide convenient health services
- Grow population and tax base
- Accommodate family activities
- Increase new businesses
- Retain families in community

### **Community Needs:**

- Recreational sports
- Baseball area (possibly batting cages)
- Indoor walking/running track
- Meeting/event center
- Gymnasium space
- Aquatic center/pool/swimming lessons
- Childcare
- Exercise

### **Potential Users (in order of importance as expressed by Planning Team):**

- Adults age 65+
- Adults age 25-44
- Adults age 45-64
- Youth age 13-18
- Children under age 12
- Young adults age 19 -24
- Employees of local corporations
- Physicians and their patients

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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### **Facilities and Programs Desired (in order of importance as expressed by Planning Team):**

- Indoor walking and jogging track
- Gymnasium for basketball, volleyball, and other recreational activities
- Indoor warm water pool for aquatic exercise and therapy
- Nursery that provides babysitting while members and guests use the center
- Meeting rooms and educational classrooms
- Dedicated fitness area for children
- Indoor lap pool for swimming and group exercise
- Outdoor recreational pool with slides, lazy river current, zero depth entry
- Variety of cardiovascular and strength training exercise equipment
- Aerobics studio and group exercise classes
- Outdoor lap pool for swimming and group exercise
- Youth locker rooms
- Mind/body studio and exercise classes (Yoga, Pilates)
- Racquetball/squash courts
- Snack/juice bar serving healthy foods and beverages (in lieu of full service café)
- Indoor group cycling “Spinning” studio, equipment, and classes
- Indoor recreational pool with slides, lazy river current, zero depth entry
- Sauna and steam rooms
- Tennis courts
- Full service café
- Pro shop to sell clothing and other logo items and fitness supplies
- Whirlpool, jacuzzi
- VIP locker rooms
- Community child care
- Batting cages
- Outdoor walking paths (must be safe)
- “Fun stuff” for youth (e.g., climbing wall, skateboard park, outdoor recreation areas).
- Splash pad
- Sand volleyball
- Pickleball
- Turf

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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### **Location:**

- Anywhere within the city limits of Jesup.
- Near Jesup Community school.
- Accessible by bicycle.
- Near new soccer complex
- Center of town – Hart property on Hawley St, Thompson property on Young St, Land of Corn Park on Young St, Hawkeye Tool & Die on Young St., Spahn & Rose on Douglas St, Consolidated Energy on Douglas St.
- Kayser property on Stevens St.
- Jesse property on 1<sup>st</sup> Street

### **Development Considerations:**

- City, school, and community working together
- Community buy-in through advisory committee representing all groups
- Funded through user fees or taxes, self-supporting programs

### **Programs and Services (in order of importance as expressed by Planning Team):**

- Open recreation and fitness
- Health and fitness programs/activities for seniors
- Sports Leagues
- Health and fitness programs/activities for children
- Weight loss and weight management programs
- Sports performance training programs/services
- Fitness programs designed specifically to help individuals with special conditions such as arthritis, diabetes, pulmonary disease, or heart disease
- Personalized approach to assessing individual needs and helping achieve fitness and wellness goals (personal fitness assessment and wellness/exercise prescription)
- Personal training services
- Educational programs and seminars on health and wellness topics such as nutrition, stress management, blood pressure, cholesterol, and women's/men's health
- Programs designed to improve an individual's spiritual health and well-being
- Alternative medicine programs such as chiropractic, acupuncture, biofeedback, and meditation
- Therapeutic massage services
- Health and wellness resource library with reading materials, videos, and computer programs related to health, fitness, and wellness
- Day spa services such as various forms of massage, body wraps, facials, hydrotherapy treatments, nail care

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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- Medical spa services such as facial peels, microdermabrasion, laser skin treatments, laser hair removal and botox injection treatments
- Culture and craft programs
- Gymnastics/tumbling
- Karate

### **Potential Healthcare Partners:**

- Allen Hospital
- Covenant Hospital
- Buchanan County Health Center
- Mercy Health Institution

### **Other Potential Partners/Collaborators:**

- Jesup Community School, St. Athanasius
- Jesup Gym, Average Joe's, local chiropractors & massage therapists
- Hawkeye Community College, UNI, Upper Iowa
- Assisted Living Center
- Local businesses – Bertch, Prinsco

### **Indicators of Success:**

- Membership and usage
- Customer feedback
- Positive buzz in community
- Financially sustainable
- Kids off streets
- Population growth
- Healthier community, "Blue Zone"

### **Potential Barriers to proposed Center Success:**

- Participant Cost
- Competition with local businesses – Jesup Gym, Average Joe's, Inspired Living
- Affordable services
- Space availability
- Status quo

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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- 75% of the city residents work outside of area
- Building too large of a center that is not financially sustainable over time
- Vocal minority:
  - “Until sidewalk issue is settled, wellness center is dead in the water”
  - Perception that city council need to get pulse of community

### **Employers with over 25 employees in the Jesup area include:**

- Bertch Cabinet Manufacturing
- Bloom Manufacturing
- Hawkeye Tool and Die
- Prinsco
- Jesup Community School

### **Other smaller businesses with over 10 employees may include:**

- Mark Birdnow Chevrolet
- Bank Iowa
- Farmers State Bank
- Kite Construction
- Casey’s General Store
- KwikStar
- B&B Farmstore
- East Central Iowa Cooperative
- Fertilizer Dealer Supply
- Consolidated Energy
- Spahn & Rose Lumber Co.
- St. Athanasius School
- Farmers Mutual Telephone Co.
- Jesup Food Center

### **Area hospitals:**

- Covenant Medical Center, Waterloo
- Allen Memorial Hospital, Waterloo (A citizen of Jesup who owns farmland within the city has recently passed away and has reportedly donated a portion of his estate to Allen Hospital)
- Buchanan County Health Center, Independence

## ***PLANNING TEAM & STAKEHOLDER INPUT***

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- Mercy Health Institution, Oelwein

### **Area colleges:**

- Hawkeye Community College, Waterloo
- University of Northern Iowa, Cedar Falls
- Upper Iowa University, Fayette
- Kirkwood Community College, Cedar Rapids
- Northeast Iowa Community College, Calmar

## ***TOWN HALL MEETING INPUT***

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### **TIMING AND OBJECTIVES**

Meritage conducted two (2) town hall meetings attended by residents of Jesup on the evening of March 11 and the morning of March 12. The key objectives of these meetings was to identify and prioritize key programs, services and facility amenities to be included in the Center as well as assess overall attitudes, support and concerns of Jesup residents regarding development of the Center. The following summarizes the input from the citizens who attended.

#### **Town Hall Meeting on March 11, 2014 at 7 pm**

##### **Attendee makeup:**

- 20+ attendees
- 3 members of fitness centers in Jesup or Waterloo
- 5-6 work in Jesup, 8 work in Waterloo, 1 works in Independence, 1 works in another community

##### **Corporate Wellness:**

- 5-6 have employers that support wellness
- Blue Zones i.e. education and literature, walking groups,
- Live Smart i.e. health insurance discount programs, 50% discount
- Allan Hospital has \$20 subsidy to fitness center, requires 8x/month

##### **Unmet Athletic/Fitness Needs:**

- Gym space for multi-court activities i.e. volleyball, basketball
- Indoor walking track
- Winter soccer for 3 on 3 teams
- Jesup used to have an indoor pool, many Jesup residents travel to Waterloo for summer based water activities
- Batting cages, i.e. new Independence driving range and batting cages
- Group cycling room – “spinning” bikes
- Community room i.e. scouts, knitting, parties
- Rock climbing wall, seems to be enjoyed at "The W"
- Racquetball, taught in Jr High School
- Tennis courts – currently 2 underutilized courts at the High School
- Baseball/softball fields, not affiliated with the High School
- Sand volleyball, not affiliated with the High School
- Game room with ping pong, pool, foosball, arcade games (i.e. youth room)
- Party room

## ***TOWN HALL MEETING INPUT***

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### **Kids Programs:**

- No unorganized play area for little kids i.e cushioned zone
- Destination zone for kids not involved in structured athletics
- School district has very popular after school program - 110 families registered

### **Pool Interest:**

- Really need recreational pool for kids, swim lessons, rehabilitation
- Warm water therapy pool, Independence hospital has one
- Lap pool
- Swim lessons and water safety for kids
- Great example is "The W" in Waverly
- Splash pad interest, most attendees have kids <12, not expensive
- Cedar Valley is not used by Jesup residents, it is (1) too far at 25 minutes and (2) too expensive
- Plan for an outdoor aquatic facility in Independence

### **Program Needs:**

- Group cycling
- Yoga
- Youth sports
- Adult sports leagues – Age 18 - 40
- Senior fitness programs
- General fitness equipment (none exists at current facilities)
- Socialization space i.e. Mom/Tots, Senior cards, crafts space
- Nutritionist / dietary planning / weight management
- Personal training
- Adult education – college courses
- Activities for kids outside of school
- Gymnastics and tumbling

### **Healthcare Affiliations:**

- Half of residents go to Waterloo and half to Cedar Rapids for healthcare
  - Pediatrics go to Waterloo
- John Deere employees got to Unity Point
- Need primary care physician affiliated with Unity

## ***TOWN HALL MEETING INPUT***

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### **Location Options:**

- Easy access for kids without crossing Hwy 20
- Hart property
- Need Room for expansion including outdoor components
  - Potential phasing of project
- Adjacency to new soccer complex
- 2<sup>nd</sup> Street lots
- Site near golf course

### **Issues/Concerns:**

- Time and cost
  - 3rd shift hours needs
  - Needs to be affordable
  - “No room for more taxes”
- Indoor and outdoor amenities
- For all ages and activity preferences
- Partner with local gyms
  - Group exercise NOT needed – Average Joe's Gym has strong group exercise program i.e. kick-boxing and yoga, etc.
- Provide opportunities/venue for home school families

### **Town Hall Meeting on March 11, 2014 at 10 am**

#### **Attendee makeup:**

- 6 attendees
- 4 report using a fitness center, health club – 3 in Jesup, 1 in Independence (resident)
- 2 work outside of Jesup
- 1 retiree
- No corporate benefits tied to fitness or exercise

#### **Unmet Athletic/Fitness Needs:**

- Aquatics – indoor pool
- Stationary indoor cycling
- Indoor walking track – 200 meter
- Physical therapy/sports medicine

## ***TOWN HALL MEETING INPUT***

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- Community recreation – kids and adults
- Group exercise
  - Martial arts
  - Dance
- School too busy
- Don't duplicate or hurt Average Joe's

### **Amenities Desired:**

- Adequate locker rooms
- Weight training area
- Classrooms or multi-purpose rooms
- Kidzone
  - Non-sports related, i.e. computers
  - Arts
  - Creativity
  - Cub scout meeting/event space
  - Library too crowded
- Onsite childcare/babysitting - positive at new Waterloo Sportsplex
- Nutrition focus (counseling, cooking, healthy eating)
- Retail - pro shop
- Beverage service – coffee/water
- Rock climbing wall i.e. The W in Waverly
- Whirlpool

### **Underserved Segments:**

- All ages
- Functionally age appropriate spaces, but not age integrated
- Older adults "intimidated" by Rex's atmosphere

### **Programming Needs:**

- Lack of indoor pools in greater area
- Swim lessons
- Water aerobics
- Certifications, i.e. CPR
- Youth education i.e. "say no to drugs", etc.

## ***TOWN HALL MEETING INPUT***

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- Older adult classes, i.e. yoga, low impact group exercise
- Group sports practice facilities i.e. Dirt Divas, Hwy 20 Softball
- Adult tournament opportunities such as basketball, volleyball (not on school property)
- Rock climbing
- Soccer training in winter
- Club sports/ AAU

### **Location Options:**

- Convenient and accessible
- Bike access for kids (1 mile radius from center of town)
- Not south of Hwy (too risky for kids)
- Avoid industrial park, too much truck traffic, shift changes
- Proximity to schools

### **Concerns:**

- Don't duplicate or hurt Average Joes, Jesup Gym or School Recreation Program
- School too busy
- User fees/affordability
- Impact on real estate taxes
- Reaching broad audience thru survey

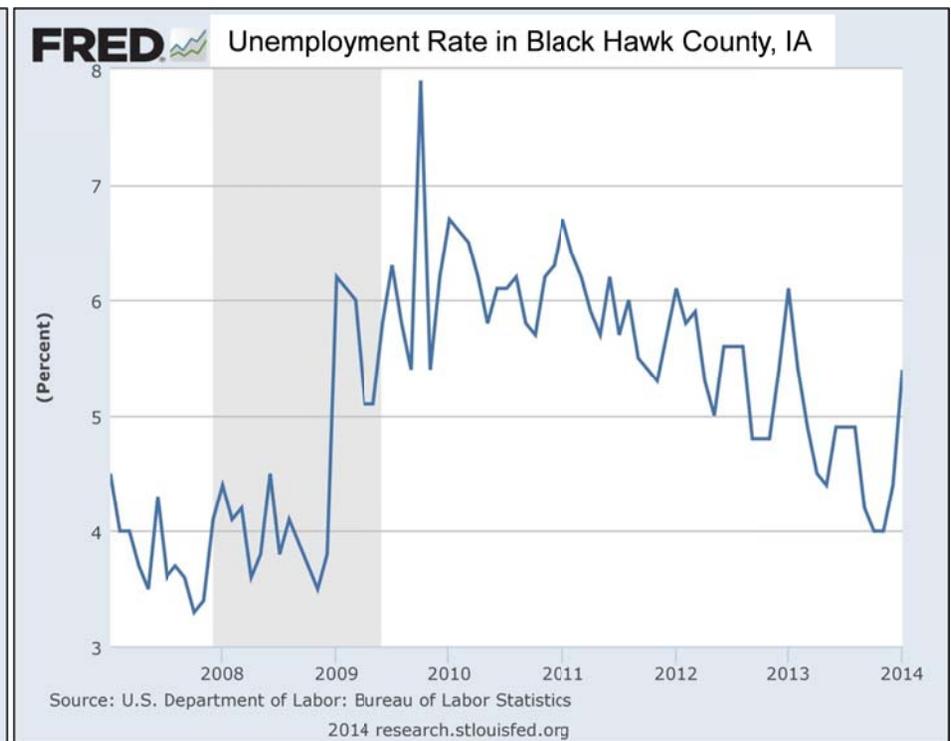
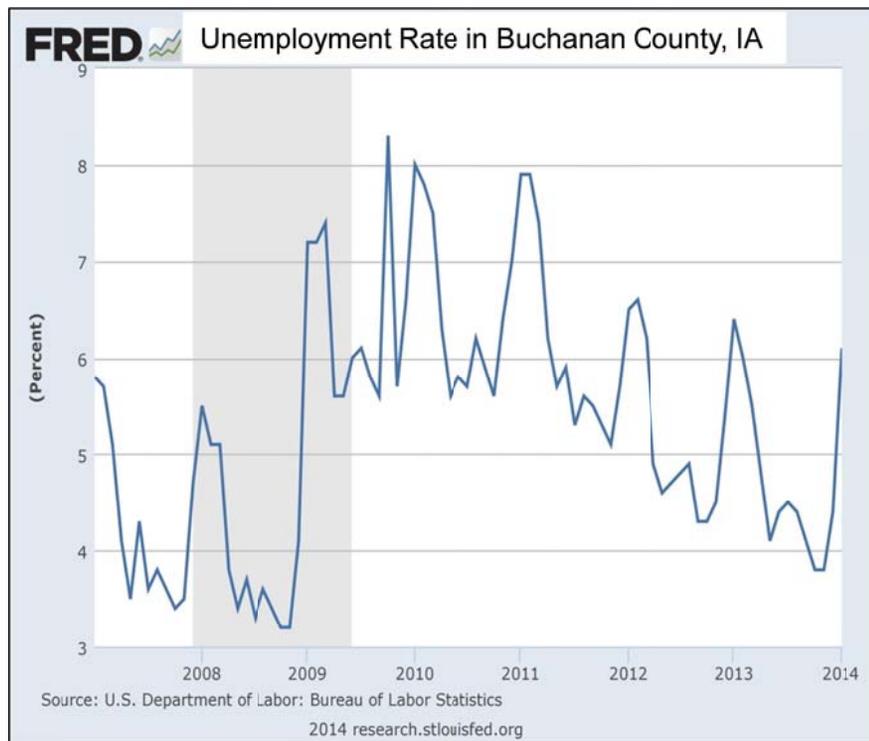
### **Other Positives:**

- Local job creation
- Stimulate ancillary business revenues
- The Blue Zone Group - potential grant monies
- Blackhawk County Gaming Commission - potential grant monies

## MARKET DEMOGRAPHICS & MEMBER POTENTIAL

### ECONOMIC ENVIRONMENT

Economic indicators show that the US economy continues to grow slowly. The national jobless rate was 6.6% in January 2014, lower than the average for this decade of 8.6%, but higher than the 60-year pre-recession average of 5.6%. The chart below shows the changes in unemployment in Buchanan County and Black Hawk County over the last seven years. Unemployment appears to have increased during and immediately after the recession, reaching a high of 8.3% in Buchanan County and a high of 7.9% in Black Hawk County in late 2009, then steadily dropping to 6.1% in Buchanan County and 5.4% in Black Hawk County by December 2013, which is lower than the national average, but is still higher than pre-recession rates for this area.



# MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL

## DEMOGRAPHIC ATTRIBUTES

**General Profile of Fitness Consumer:** Consumers who participate in fitness memberships are more likely to be:

- Female
- Caucasian
- Over the age of 40
- Have at least some college or technical training
- Employed in white collar occupations
- Earning over \$50,000 household income

Nationally, consumer surveys have shown that fitness members consider 8 minutes drive time to be “very convenient”, and consider 12 minutes drive time to be “somewhat convenient”, resulting in an average Primary Market Area of 12 minutes. In less populous, rural areas, Meritage has seen the primary market for fitness centers extend to 15 to 20 minutes in some cases. In determining the market area for the proposed Center, 15 minutes drive time extends to the eastern edge of Waterloo. Therefore, Meritage recommends the Primary Market for the proposed Center is contained within a 7 mile radius of the Jesup Community School District. The 2014 demographic characteristics for the 7 mile radius, along with the comparative characteristics for the US, are presented below.

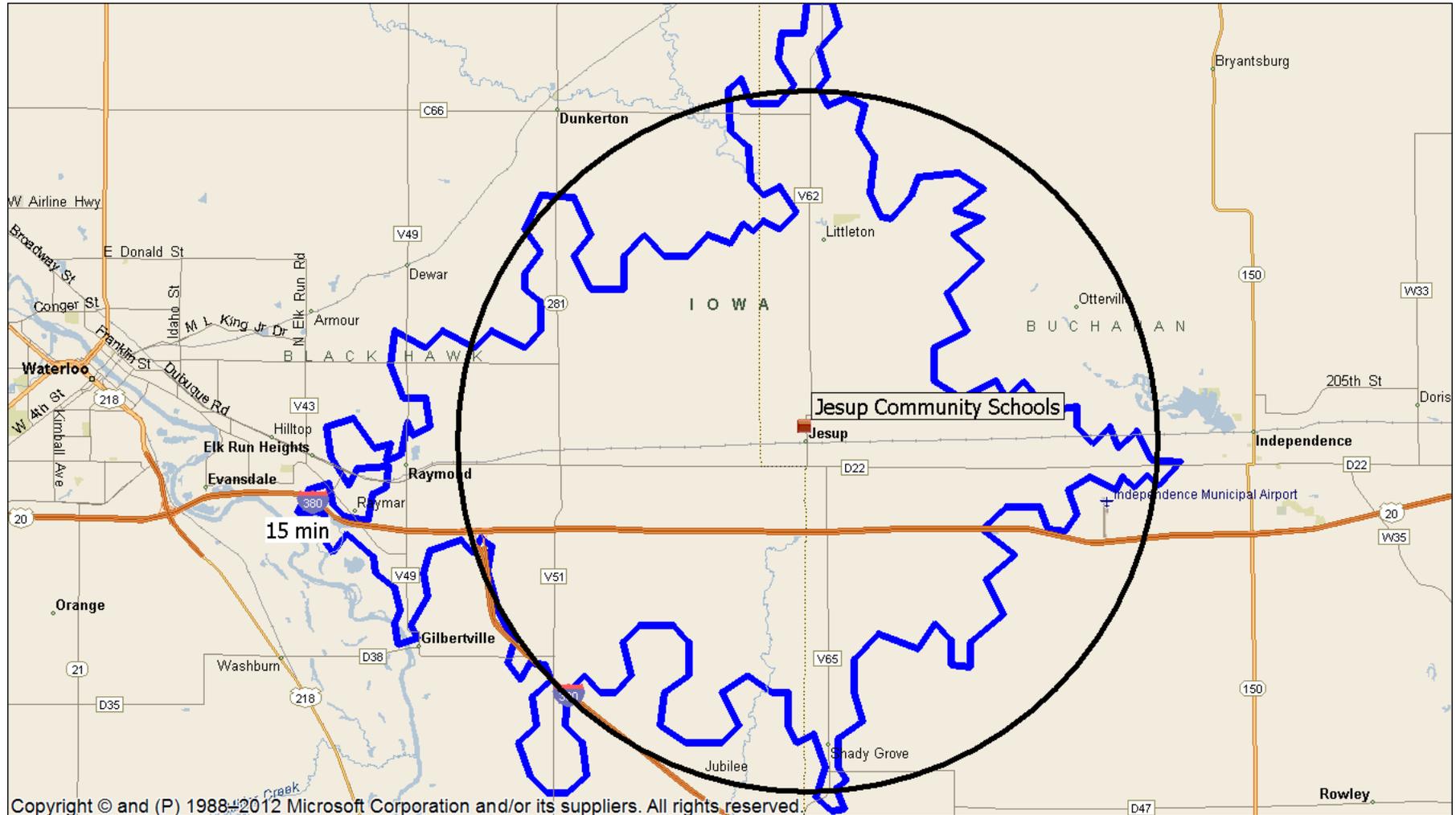
Jesup High School Radius		
Demographic Attribute	7 Mile Radius	USA
Population	5,543	317 Mil
Growth Rate	1.9%	3.5%
Households	2,121	120 Mil
Household Size	2.61	2.57
Households with Children	35.7%	33.5%
Median Household Income	\$64,707	\$51,579
Percent Owner Occupied	81.8%	65.0%
Median Age	37.9	37.7
Married, Spouse Present	62.6%	46.0%
Ratio Male to Female	0.97	0.97
% College	49.3%	57.4%
% Work Force	70.1%	64.3%
% White Collar	51.6%	60.7%
Commute (Min)	25.4	27.9

**Notes:**

- (1) Based on 2014 updated census data obtained from Nielsen Claritas.
- (2) Cost of living index in Black Hawk in March 2012 was 84.1 (lower than U.S. average, which is 100) per [www.city-data.com](http://www.city-data.com). Adjusting for this cost of living within a fifteen minute drive time would result in “effective” household income of approximately \$76,941, nearly 50% higher than the national average.
- (3) College data is measured as a percent of residents age 25+.
- (4) Work force data is measured as a percent of residents aged 16+. White-collar employment is measured as a percent of those employed.

# MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL

## PRIMARY/SECONDARY MARKET AREA MAP



(Blue Line = 15 Minute Drive Time; Red Circle = 7 Mile Radius)

## ***MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL***

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### **SUMMARY OF DEMOGRAPHIC PROFILE FOR THE PRIMARY MARKET**

The population within the Primary Market Area (defined as a 7-mile radius from Jesup Community Schools) is approximately 5,500, and is expected to increase 1.9% by 2019.

- There are approximately 2,100 households within the Primary Market Area, of which 35.7% have children under the age of 18 years, higher than the national average of 33.5%.
- The median age is 37.9, which is comparable to the national median age of 37.7.
- The market has a higher marital status than the national average.
- The rate of home ownership is also higher than the nation as a whole within the Primary Market Area.
- The median income for a household in the Primary Market is \$64,707, well above the national average, especially after adjusting for lower local cost of living.
- Seven in ten (70.1%) of those aged 16+ are employed in the work force, higher than the national average of 64.3%.
- Educational achievement and white collar employment are both below national averages. Work commutes are shorter than the national average. Shorter commutes may indicate more time available to pursue recreation and fitness participation.

### **MARKET SEGMENTATION**

**Household Income.** More than half of fitness center members nationwide come from households with \$75,000 plus income. The Primary Market has significantly more households with \$75,000 plus income than the nation as a whole, as shown in the table below. The households with \$75,000 plus income comprise approximately 39% of the market, higher than the national average of 33%. This positive comparison is even greater when the lower cost of living is considered.

<b>Income Segment</b>	<b>7 Mile Radius from Jesup Community Schools</b>		<b>National</b>
	<b>Number</b>	<b>Percent</b>	<b>Percent</b>
<b>Under \$25,000</b>	<b>294</b>	<b>13.9%</b>	<b>24.4%</b>
<b>\$25,000 - \$34,999</b>	<b>223</b>	<b>10.5%</b>	<b>10.5%</b>
<b>\$35,000 - \$49,999</b>	<b>221</b>	<b>10.4%</b>	<b>13.9%</b>
<b>\$50,000 - \$74,999</b>	<b>547</b>	<b>25.8%</b>	<b>17.9%</b>
<b>\$75,000 - \$99,999</b>	<b>343</b>	<b>16.2%</b>	<b>11.9%</b>
<b>\$100,000 - \$149,999</b>	<b>371</b>	<b>17.5%</b>	<b>12.3%</b>
<b>\$150,000 +</b>	<b>122</b>	<b>5.7%</b>	<b>9.0%</b>
<b>Total Households</b>	<b>2,121</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Median Household Income</b>	<b>\$64,707</b>		<b>\$51,579</b>

# MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL

**Age.** Residents under the age of 18 are key users of recreation programs. The Primary Market Area has a higher than average percentage in this age segment. The age 55+ segment is also slightly higher than the national average. This age segment has been the fastest growing user group for fitness in the U.S. over the last decade, and this group values the affiliation with a healthcare provider. As shown in the table below, the market overall appears to have similarly balanced age segments as compared to the nation as a whole.

Age Segment	7 Mile Radius from Jesup Community Schools		National
	Number	Percent	Percent
<18 years old	1,493	26.9%	23.4%
18-24 years old	482	8.7%	10.0%
25-34 years old	615	11.1%	13.2%
35-44 years old	638	11.5%	12.7%
45-54 years old	777	14.0%	13.8%
55-64 years old	743	13.4%	12.6%
65+ years old	796	14.4%	14.2%
Total Population	5,543	100.0%	100.0%
Median Age	37.9		37.7

**Education.** Meritage has found that the segments of the population who are most educated are generally more likely to value a comprehensive, medically-oriented health and fitness facility. As shown below, this market has only 17% with a college degree compared to 28% nationally.

Education Level	7 Mile Radius from Jesup Community Schools		National
	Number	Percent	Percent
High School or Less	1,810	50.7%	42.6%
Some College	1,161	32.5%	29.0%
College Graduate	398	11.2%	17.8%
Post Graduate	200	5.6%	10.6%
Total Population Age 25+	3,569	100.0%	100.0%

## **MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL**

### **FITNESS MEMBER ESTIMATES**

*The member estimates developed in this section are based on national, regional and local trends and statistics, and may vary significantly from the actual demand in a given market. Demographics for the 7 mile radius around the Jesup Community Schools have been used to develop projected market volumes. The estimates below indicate the total number of prospects expected in the market area.*

Member incidence rates for all types of fitness facilities were obtained from International Health & Racquet Sportsclub Association (“IHRSA”) studies. These member incidence rates reflect “traditional” members of health clubs.

<b>Fitness Center Member Estimates</b>	<b>7 Mile Radius</b>
<b>Estimated Total Prospects</b>	<b>879</b>
<b>Prospects by Age Segment</b>	
<b>&lt; Age 18 Prospects</b>	<b>113</b>
<b>Age 18-34 Prospects</b>	<b>238</b>
<b>Age 35-55 Prospects</b>	<b>306</b>
<b>Age 55+ Prospects</b>	<b>223</b>
<b>Prospects by Income Segment</b>	
<b>&lt;\$50K HH Income Prospects</b>	<b>192</b>
<b>\$50K-\$74K HH Income Prospects</b>	<b>224</b>
<b>\$75K-\$99K HH Income Prospects</b>	<b>173</b>
<b>\$100K+ HH Income Prospects</b>	<b>290</b>

**Sources:**

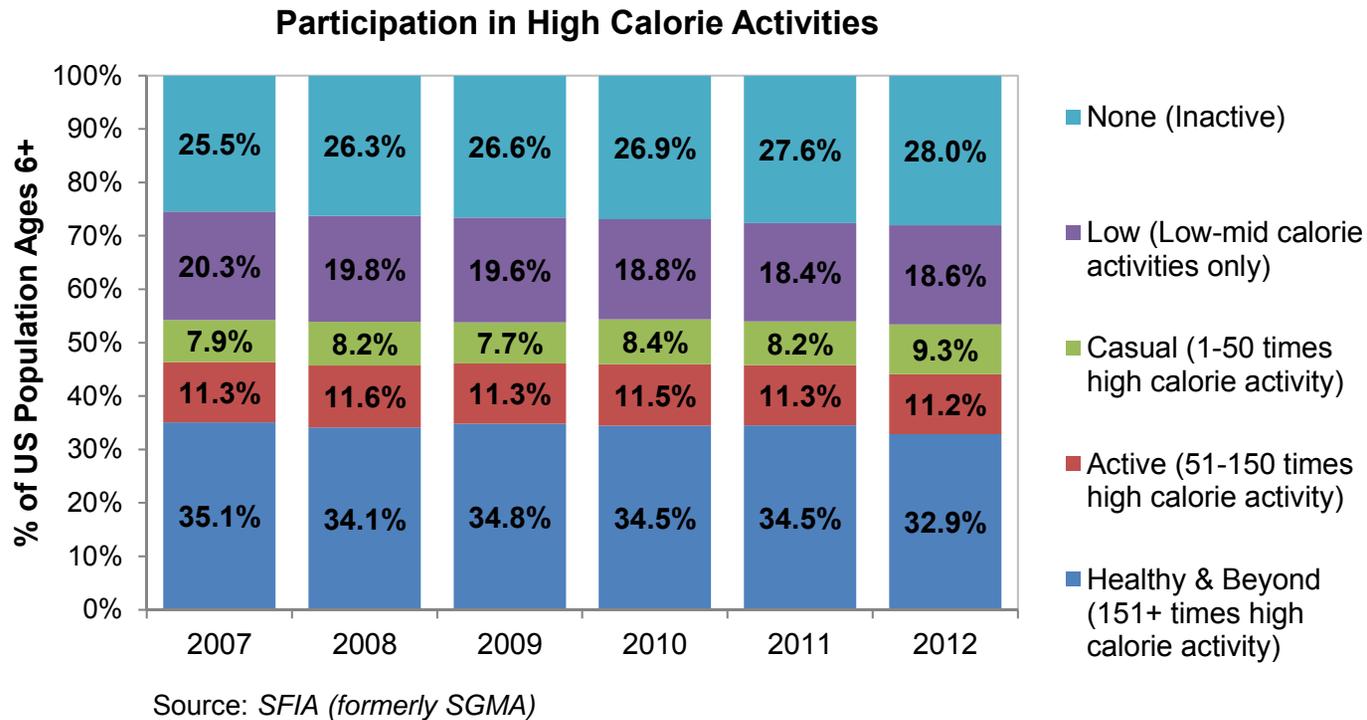
- Based on 2014 demographics obtained from Nielsen Claritas.
- Based on club incidence rates by geography, income and age obtained from IHRSA studies.

The above member estimates include all “traditional” health club members within the market area in all types of fitness centers. Existing competitors have captured at least a portion of the above members. If the Center is able to affiliate with a healthcare provider and align with health plan coverage in the area, there may be opportunity to capture greater participation in fitness membership and wellness programs.

# MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL

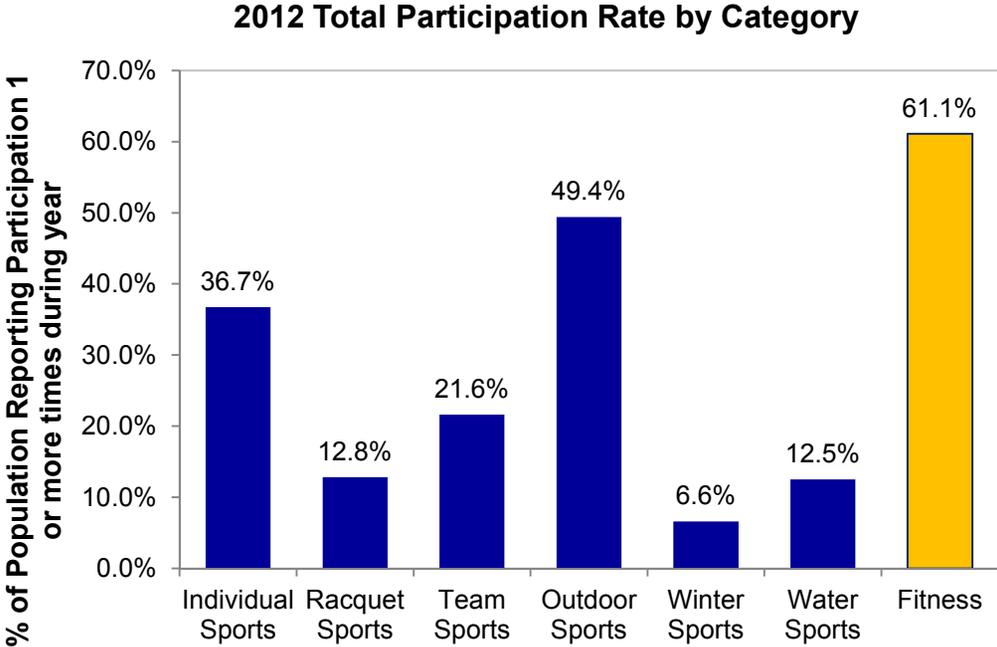
## SPORTS PARTICIPATION TRENDS

**Activity/Participation Levels.** Sports participation drives both sports medicine and sports performance service volumes. In spite of a positive growth curve in the overall fitness industry and the medical fitness industry, there continues to be only a relatively small percentage of the population actively participating in fitness membership at any point in time. In fact the number of inactives, people who do not participate in any fitness or recreation activities, has consistently exceeded the number who belong to fitness centers. The inactives segment has grown both as a percent of the total US population between 2007 and 2012, as shown in the chart below, while the most active group has declined as a percent of population.



# MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL

**Participation by Type of Activity.** Many individuals report participation in fitness activities even though they are not members of a fitness center. Fitness related activities continue to represent the highest level of sports and fitness participation. Many fitness participants also participate in multiple sports (resulting in percentages adding to more than 100%). The Fitness category includes many intermittent exercisers, including those who work out at home, as well as those who are members of a fitness facility. This category includes aquatic exercise and group exercise, as well as working out with equipment or free weights.



Source: SFIA (formerly SGMA)

## ***MARKET DEMOGRAPHICS & PARTICIPATION POTENTIAL***

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### **LOCAL RECREATION PARTICIPATION ESTIMATES**

*The recreation participation estimates developed in this section are based on national trends and statistics, and may vary significantly from the actual demand in a given market. Demographics for the 7 mile radius around the Jesup Community Schools have been used to develop projected market volumes. The estimates below indicate the total number of prospects expected in the market area.*

Participation in recreational activities, which are usually less frequent than fitness center participation, tend to draw from farther distances with 25 minutes being the industry norm. However, the boundaries of this market are most likely defined by the 7 mile radius due to recreational opportunities in neighboring communities of larger size, such as Waterloo and Independence. Additionally, some of these users are included in the fitness membership estimates, and some users may participate in multiple activities, including leagues. Caution is required to prevent duplication of participants.

<b>Estimated Participation among Age 7+ Population - Jesup High School Radius</b>					
<b>Sport Category</b>	<b>Number of Participants</b>	<b>Key Specific Sports</b>	<b>Basketball</b>	<b>Volleyball</b>	<b>Aquatic Exercise</b>
<b>Individual Sports</b>	<b>1,854</b>	<b>Participation Rate</b>	<b>8.3%</b>	<b>2.2%</b>	<b>3.4%</b>
<b>Racquet Sports</b>	<b>647</b>	<b>Number of Participants</b>	<b>419</b>	<b>111</b>	<b>172</b>
<b>Team Sports</b>	<b>1,091</b>	<b>Average Times per Year</b>	<b>20</b>	<b>18</b>	<b>50</b>
<b>Outdoor Sports</b>	<b>2,496</b>	<b>Total Potential Attendance</b>	<b>8,388</b>	<b>2,001</b>	<b>8,590</b>
<b>Winter Sports</b>	<b>333</b>				
<b>Water Sports</b>	<b>632</b>				

**Sources:**

- Based on 2014 demographics obtained from Nielsen Claritas.
- Based on participation rates by obtained from SFIA studies.

Jesup Recreation Department offers a variety of programs which have attracted 1,392 participants. This number would include duplication of individuals who participate in more than one activity offered. The activities include leagues, clinics and educational programs, most of which have fees associated with participation. The proposed Center would expand the opportunities to provide additional programming indoors during winter months. These programs are currently run by the School District and partially funded by the City.

## ***COMPETITOR ANALYSIS***

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### **APPROACH TO FITNESS AND RECREATION CENTER PROVIDERS ANALYSIS**

Health and fitness center providers/competitors can fit into several different categories of ownership, size and operation. For instance, providers could include fitness centers owned and operated by any one of the following: large national chains (i.e., 24 Hour Fitness, Gold's Gym), "niche" franchises (e.g., Curves, Anytime Fitness), country clubs, municipalities, colleges and universities, YMCAs, Jewish Community Centers, churches, individuals, and of course hospitals. Medically affiliated fitness centers will attract segments of the population that elect not to become members of these "traditional" health clubs/fitness centers, thus expanding the market. In fact, the two medical fitness centers in the secondary market area have likely captured some of these unique members within each of those markets.

Meritage conducted an analysis of fitness center providers in Jesup, Independence and Waterloo. While research consistently indicates that approximately 85% of fitness center members reside within 12 minutes of the center to which they belong, we evaluated fitness centers beyond this drive time since Jesup is located almost equidistance between Independence and Waterloo, and a large percentage of Jesup residents work in or near these municipalities.

- A total of 15 fitness center providers of varying size and scope were identified within the market areas studies.
- Two facilities located in Jesup are within the traditional 12 minute drive time, four facilities in Independence are beyond a 12 minute drive time from Jesup, and nine facilities in Waterloo are all beyond a 15 minute drive time from Jesup.
- A few additional fitness providers were identified but not considered fitness providers due to the limited scope of programs, services and/or facilities provided (e.g., boxing and martial arts studios, Curves, worksite centers, etc...).

Each fitness center provider was visited "mystery shopped" by Meritage; however, due to our familiarity with Snap Fitness and Planet Fitness facilities, personal visits were not conducted at those facilities. The objective of each visit was to learn details about the facility and its amenities, programs and services, as well as the membership sales process and overall guest experience. In some cases, follow-up online and/or telephone research was also conducted.

The maps on pages 29 and 30 show the locations of the fitness center providers and their relation to 12 and 15 minute drive times from Jesup. A detailed listing of facility amenities, programs, services and membership rates for each facility visited is provided in the tables beginning on page 35. The table on the following page provides the address and some information about each center

## COMPETITOR ANALYSIS

### FITNESS CENTER PROVIDERS' LOCATION, SIZE, AGE AND NUMBER OF MEMBERS

Facility	Address	Primary / Secondary Market	Distance from Jesup	Drive Time from Jesup	Facility Size	Facility Age (estimated)	# of Members (estimated)
<b>Jesup</b>							
Jesup Gym	1320 12 <sup>th</sup> St.	Primary	< 1 mile	1-2 minutes	3,500 SF	30 years	100 (1)
Average Joe's	511 Young St.	Primary	< 1 mile	1-2 minutes	1,000 SF	N/A	100 (1)
<b>Independence</b>							
Therapy & Wellness Center	1600 1 <sup>st</sup> St. E.	Secondary	9.6 miles	17 minutes	20,000 SF	9 years	500
River's Edge Sports & Fitness	206 2 <sup>nd</sup> Ave.	Secondary	8.6 miles	14 minutes	20,000 SF	1 month	NA
Falcon Civic Center	1305 5 <sup>th</sup> Ave.	Secondary	9.8 miles	16 minutes	20,000 SF	N/A	400
Snap Fitness	2016 Enterprise Ct.	Secondary	9.1 miles	14 minutes	1,200 SF	N/A	250
<b>Waterloo</b>							
Cedar Valley Sportsplex	300 Jefferson St.	Secondary	17.6 miles	18 minutes	150,000 SF	3 months	1,800
YMCA	669 S. Hackett Rd.	Secondary	20.5 miles	22 minutes	50,000 SF	33 years	2,700
YWCA	435 Lafayette St.	Secondary	18.1 miles	20 minutes	5,000 SF (2)	100 years	250
River Plaza Athletic Club	10 West 4 <sup>th</sup> St.	Secondary	17.4 miles	19 minutes	27,000 SF	30 years	1,000
Covenant Lifeline Wellness Center	2101 Kimball St.	Secondary	17.5 miles	19 minutes	12,500 SF	N/A	1,000
Planet Fitness	2028 E. Ridgeway Ave.	Secondary	16.5 miles	16 minutes	18,000 SF	3 months	5,000
Anytime Fitness	1245 Flamang Dr. (3)	Secondary	16 miles	17 minutes	3,000 SF	7 years	600
The Roc Fitness Gym (4)	2332 Crossroads Blvd.	Secondary	16 miles	18 minutes	15,000 SF	N/A	750
Snap Fitness	3556 Kimball St.	Secondary	17.3 miles	19 minutes	3,000 SF	< 1 year	350
						<b>TOTAL</b>	<b>14,600</b>

Notes: (1) Neither Jesup Gym nor Average Joe's has a typical monthly membership comparable to the centers in the secondary market. Each has a "regular" user base of approximately 100.

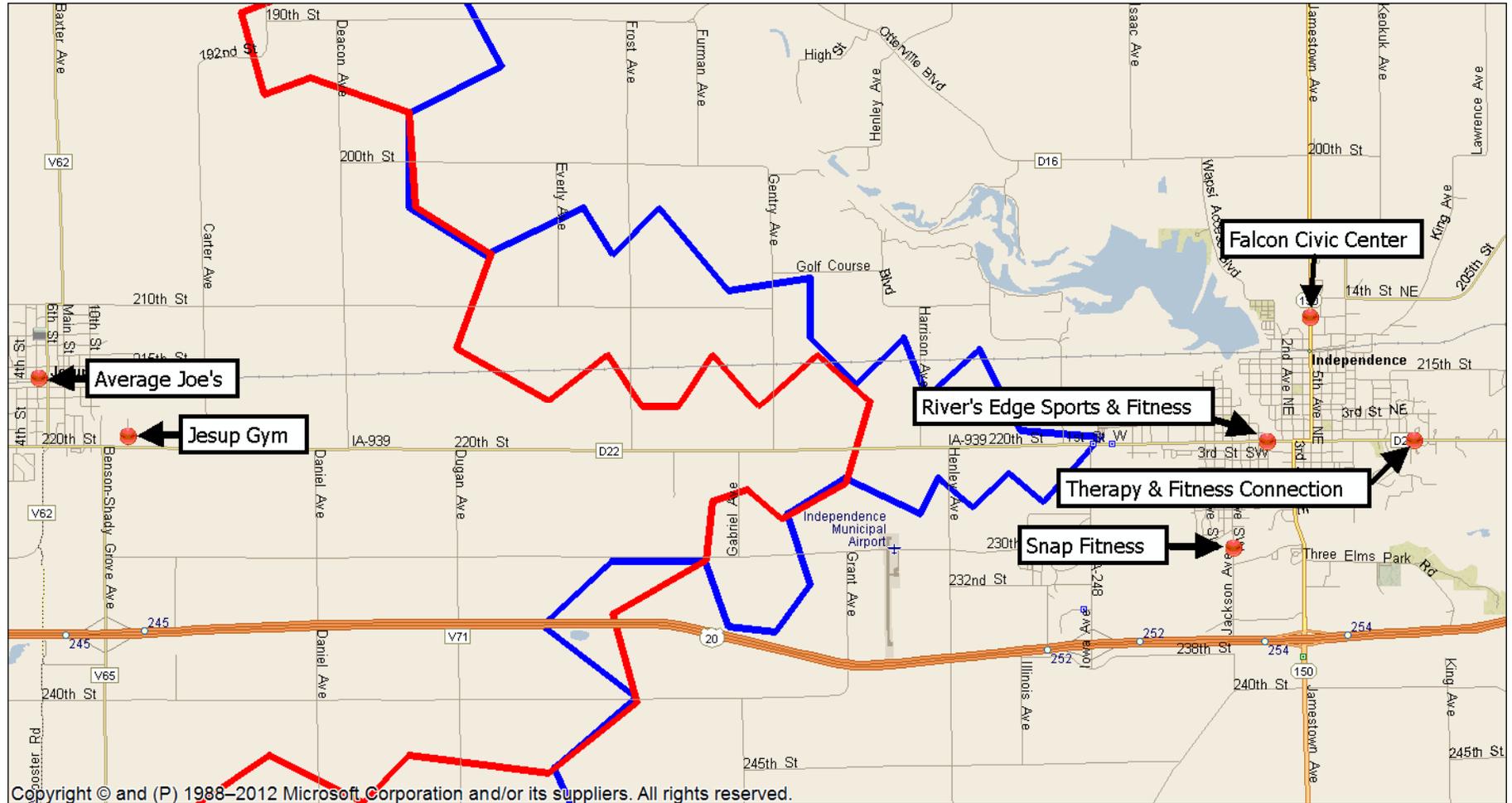
(2) Fitness only

(3) Moving across the street in April

(4) Formerly Gold's Gym

# COMPETITOR ANALYSIS

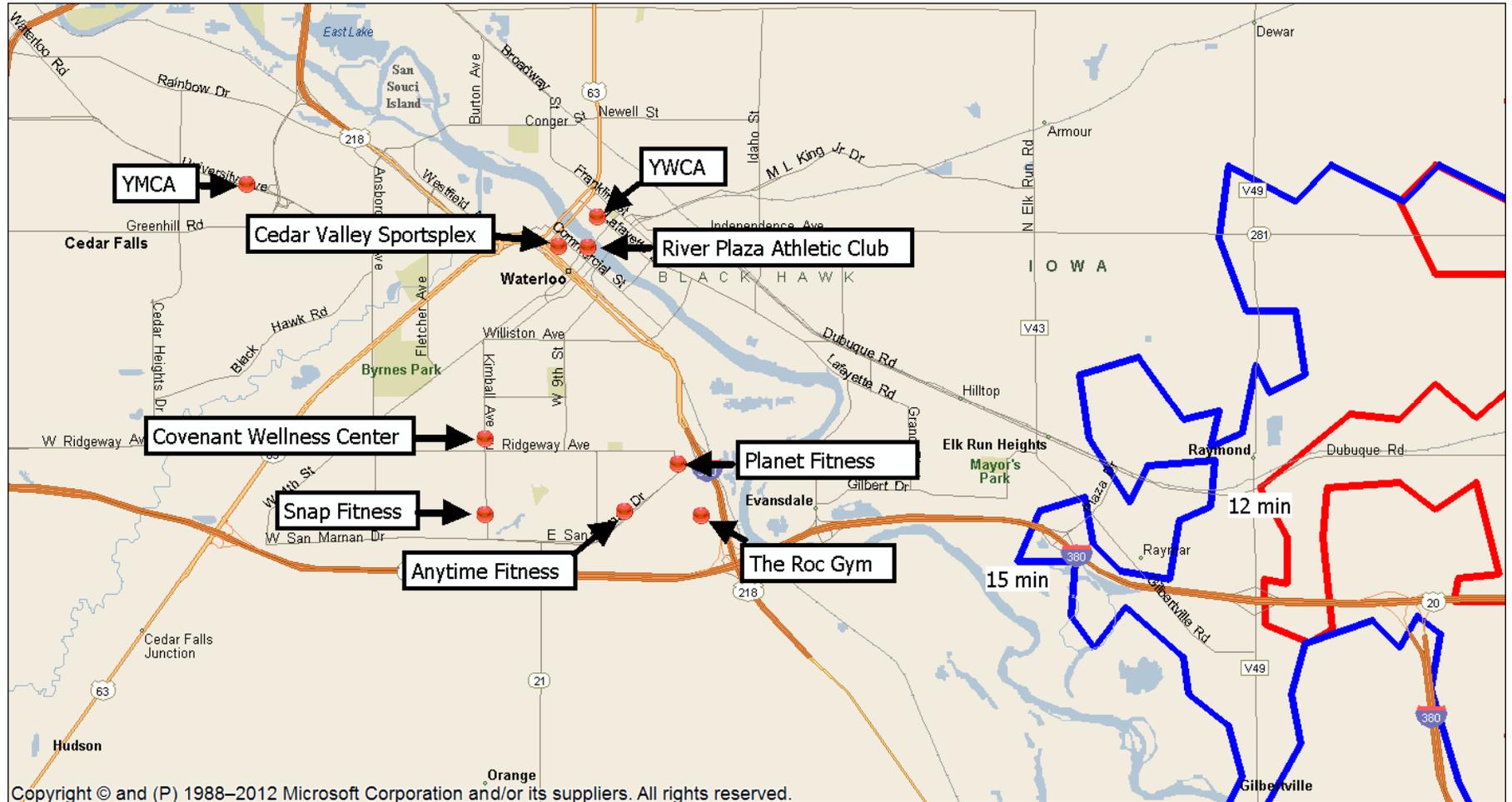
## FITNESS CENTER PROVIDER LOCATIONS – JESUP AND INDEPENDENCE



Red Line = 12 minute drive from Jesup Community Schools  
Blue Line = 15 minute drive from Jesup Community Schools

# COMPETITOR ANALYSIS

## FITNESS CENTER PROVIDER LOCATIONS – WATERLOO



Red Line = 12 minute drive from center of Jesup  
Blue Line = 15 minute drive from center of Jesup

# COMPETITOR ANALYSIS

## FITNESS CENTER PROVIDERS RANKINGS

Facility	Proximity to Jesup	Location Visibility	Location Accessibility	Exercise Equipment Variety	Exercise Equipment Condition	Program Variety	Facility Amenities	Facility Overall Appearance	Facility Cleanliness	Total Points	Rank
<b>Primary Market</b>											
Jesup Gym - Jesup	10	9	10	5	6	3	3	4	8	49	1
Average Joe's Jesup	10	3	8	1	7	1	2	3	7	35	2
<b>Secondary Market</b>											
Cedar Valley Sportsplex – Waterloo	4	10	7	7	10	7	7	9	10	71	1
Planet Fitness – Waterloo	4	8	10	7	10	3	3	8	8	61	2
Therapy & Wellness Center – Independence	5	5	10	3	8	5	5	6	9	56	3
Anytime Fitness – Waterloo	3	8	10	5	8	2	2	7	8	53	4
YMCA – Waterloo	2	5	8	5	5	8	7	4	5	51	5
Snap Fitness – Independence	5	4	10	4	9	2	2	7	8	51	5
Falcon Civic Center – Independence	5	9	10	3	4	4	4	3	3	45	7
River Plaza Athletic Club – Waterloo	2	0	4	5	7	5	5	6	7	41	8
The Roc Fitness Gym – Waterloo	3	6	10	5	4	4	3	3	3	41	8
Covenant Lifeline Wellness Center– Waterloo	3	0	2	5	7	5	4	5	8	39	10
Snap Fitness – Waterloo	2	6	5	5	6	2	2	5	5	38	11
YWCA – Waterloo	2	4	7	2	3	3	4	2	3	30	12
River's Edge Sports & Fitness – Independence	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Note: A scale of 1 to 10 is used for assessing each variable with 1 representing least favorable impression and 10 representing most favorable impression.  
Total possible points = 90

# **COMPETITOR ANALYSIS**

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## **SUMMARY OF FINDINGS**

The following information relates to the fitness center providers visited by Meritage in March, 2014.

- The City of Jesup has two fitness facility providers, Average Joe's and Jesup Gym. These are the only fitness facilities within the Primary Market Area (12 minute drive time from the center of Jesup).
- There are no large facility national fitness center chain (Lifetime Fitness, 24 Hour Fitness), or Jewish Community Centers located in the Primary or Secondary Market Areas.
- There are three small facility national chains (Anytime Fitness, Planet Fitness, Snap Fitness), one municipality affiliated center (Cedar Valley Sportsplex), and several locally owned centers in the Secondary Markets of Independence and Waterloo.
- There are two facilities operating as "medical fitness centers" or affiliated with hospitals in the Secondary Market Area (Covenant Wellness Center in Waterloo and Therapy & Wellness Center in Independence).
- The City of Independence Parks and Recreation Department opened a facility called "Rivers Edge Sports & Fitness" in early 2014 that is not a fitness center and does not sell memberships. Instead, this facility provides several batting/pitching cages, golf game simulators and a very large multi-purpose meeting/banquet room that can be used for special events and parties.
- The City of Waterloo recently opened a very large community sports, fitness and recreation center (Cedar Valley Sportsplex) that has two indoor soccer fields, two regulation basketball courts, an indoor aquatics center with a lap and recreation pool complete with water slides and fountains, large indoor walk/jog track, strength and cardiovascular exercise equipment and group exercise studios. The center reported 1,800 members after three months of operation.
- As determine by computer mapping software using the most direct driving route (not "as the crow flies"), the closest facility in the Secondary Market to the center of Jesup is Snap Fitness in Independence at 9.1 miles with a drive time of 14 minutes. The farthest facility is the YMCA in Waterloo at 20.5 miles with a drive time of 22 minutes. Actual drive times will vary based on routes, traffic congestion and time of day.
- The largest facility is Cedar Valley Sportsplex at 150,000 square feet with Average Joe's being the smallest facilities at approximately 1,000 square feet.
- The total estimated number of members served by all the facilities visited is 14,600. Information related to the exact number of current members was not provided during the visit at several centers; therefore, membership estimates at those facilities were based on facility size, program scope and our experience. Surprisingly, the largest number of members have been captured by the new

## **COMPETITOR ANALYSIS**

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Planet Fitness in Waterloo. A staff member said they have 5,000 members even though they have only been open for approximately three months.

- When evaluating and comparing visibility, accessibility, appearance, cleanliness, program and equipment variety, as well as the condition of facilities of each facility visited, Cedar Valley Sportsplex ranked the highest. The YWCA in Waterloo ranked the lowest among all centers.
- The facility that provides the largest variety of exercise and recreational amenities is Cedar Valley Sportsplex while Average Joe's provides the least variety.
- The YMCA provides the largest variety and quantity of programming and member services followed very closely by Cedar Valley Sportsplex. Average Joe's provides the least.
- The two fitness center providers in Jesup (Average Joe's and Jesup Gym), are limited in facility size, facility amenities and programming scope; however, each have a very loyal participant base. Average Joe's exclusively provides a variety of group exercise classes and Jesup Gym provides a good variety of strength training equipment (no cardiovascular exercise equipment) for \$1 per visit and Kickboxing classes for a monthly fee of \$34.95.
- The "published" enrollment fees for an individual membership range from a high of \$99 at The Roc Fitness Gym to the low of \$0 enrollment at Cedar Valley Sportsplex, River Plaza Athletic Club, Planet Fitness and Average Joe's. However, enrollment fees are frequently discounted and special "deals" are often offered by most fitness centers throughout the year which was indeed the case during several of the visits. Monthly dues for an individual membership range from a high of \$42 at River Plaza Athletic Club to a low of \$10 at Planet Fitness. Jesup Gym does not sell monthly memberships but instead, allows participants to pay a day usage fee of \$1.
- Facility tours were provided at each center visited with the exception of The Roc Fitness Gym. All tours conducted were provided by a staff person of the respective center and consisted primarily of a quick walk through of the facilities while pointing out key exercise areas, amenities and equipment. None of the centers visited personalized the tour by asking about individual fitness goals and interests and customized the introduction of the facility, equipment and the sales approach accordingly. In essence, the extent of the each tour was focused on showing facility amenities and providing information about membership pricing.
- None of the centers visited used "high pressure" sells tactics (e.g., today only discount, ask the manager to reduce the price, etc...) and none made any attempt to "close the sale" at the conclusion of the tour. Very surprisingly, none of the centers asked for personal information (name, address and phone number); therefore, followed up to assess continued interest in joining or to extend an invitation to return to the center was not possible.

## ***COMPETITOR ANALYSIS***

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### **CONCLUSIONS REGARDING FITNESS CENTER PROVIDERS**

The following observations are based on the findings of the competitive analysis conducted in the primary market area, as well as Meritage's experience visiting over 700 fitness facilities across the country:

- Level of competition to the proposed Center from current fitness center providers visited by Meritage:
  - **Significant:** Jesup Gym due to location, loyalty to owner by users, and extremely low participation fees (\$1 per visit), Cedar Valley Sportsplex due to its comprehensive fitness and recreational amenities and programming
  - **Moderate:** Average Joe's due to location and loyalty to group exercise programs, YMCA, Therapy and Wellness Center, Planet Fitness
  - **Minimal:** YWCA, Snap Fitness, Anytime Fitness, The Roc Fitness Gym, River Plaza Athletic Club, Falcon Civic Center, Covenant Lifeline Wellness Center, River's Edge Sports and Fitness
- City of Jesup does not currently have a comprehensive fitness center provider.
- Secondary market areas (especially Waterloo) are well served by a variety of traditional commercial and municipal fitness centers.

# COMPETITOR ANALYSIS

## COMPETITOR FACILITY AND AMENITIES – WATERLOO

Facility Amenities	Cedar Valley Sportsplex	YMCA	YWCA	River Plaza Athletic Club	Covenant Lifeline Wellness Center	Planet Fitness	Anytime Fitness	The Roc Gym	Snap Fitness
Hours of Operation									
Monday – Thursday	5A-9P	5A-9P	6A-8P	5A-9P	5A-9P	24 hours	24 hours	24 hours	24 hours
Friday	5A-9P	5A-9P	6A-8P	5A-8P	5A-8P	24 hours	24 hours	24 hours	24 hours
Saturday	8A-8P	7A-6P	7:30A-5P	7A-4P	7A-5P	7A-7P	24 hours	24 hours	24 hours
Sunday	12P-8P	12P-6P	closed	11A-4P	9A-6P	7A-7P	24 hours	24 hours	24 hours
Baby Sitting	X	X			X			X	
Pro Shop/Retail Area									
Juice / Sandwich Bar				X		vending			
Full Service Café									
Conf. / Educational Room(s)	X	X							
Massage Rooms (#)					X				
Tanning Beds (#)						X	2		X
Day Spa									
Hair Salon									
Men's Locker Room	X	X	X	X	X	X	1-unsex	X	restroom
Lounge Area	X								
Day Lockers (#)	X	X	X	X	X	X		X	
Rental Lockers	In VIP								
Private Showers (#)	4				1	4	1	1	
Gang Showers		X	X	X					
Whirlpool				coed					
Steam Room				X					
Dry Sauna				X					
Women's Locker Room (1)	X	X	X	X	X	X		X	restroom
Lounge Area	X								
Day Lockers (#)	X	X	X	X	X	X		X	
Rental Lockers	In VIP								
Private Showers (#)	4	?	?	?	1	4		1	
Gang Showers									
Whirlpool				coed					
Steam Room				X					
Dry Sauna				X					
Towel Service	X			X	X				
Family Changing/locker Room	X								
VIP Locker Room	X	X							
Youth Locker Rooms									

## COMPETITOR ANALYSIS

Facility Amenities	Cedar Valley Sportsplex	YMCA	YWCA	River Plaza Athletic Club	Covenant Lifeline Wellness Center	Planet Fitness	Anytime Fitness	The Roc Gym	Snap Fitness
Express Lockers (#)									
Group Exercise Studio (#)	1 + multi-p	1		1	2	at new ctr			
Mind/Body Exercise Studio									
Personal Training Studio					X				
Group Cycling Studio		X						X	
Pilates Reformer Studio									
Martial Arts Studio								X	
Kickboxing Studio								X	
Weight Machines	X	X	very limited	X	limited	X	X	X	X
Free Weights	limited	X	very limited	X	limited	X	X	X	X
Stretching / Abdominal Area					X	X			
Cardiovascular Exercise Equip.	X	X	very limited	X	X	X	X	X	X
Audio/Video system for CV Equip.	X	X		X	X	X	X	X	X
Cardio Cinema Room									
Circuit Training Equip / Stations						X			
Specialty Equipment (type)									
Women's Only Exercise Rm / Area									
Indoor Lap Pool (size)	3x25 yds	6x25 yds	3x20 yds	4x20 yds					
Indoor Recreation Pool	X								
Indoor Exercise/Therapy Pool		X							
Outdoor Lap Pool (size)									
Outdoor Recreation Pool									
Basketball Courts - full / 1/2 (#)	2-full	1-full	1-full	1-full					
Gymnastics Apparatus									
Indoor Jogging/walking track (laps/mile)	6.5 / 1mile	14 / 1 mile		14 / 1mile					
Outdoor Jogging/walking track									
Racquetball / Squash Courts (#)		2		1					
Indoor Tennis Courts (#)									
Outdoor Tennis Courts (#)									
Outdoor Sand Volleyball Courts (#)									
Youth Indoor Rec/Play Area	X								
Youth Outdoor Rec/Play Area									
Game/Party Room	2	X							
Rock Climbing Wall									
Indoor Sports Fields	2-Soccer								
Outdoor Sports Fields (type)									
Batting Cages	2								
Golf Simulator	1								

# COMPETITOR ANALYSIS

## COMPETITOR PROGRAMS AND SERVICES – WATERLOO

Programs and Services	Cedar Valley Sportsplex	YMCA	YWCA	River Plaza Athletic Club	Covenant Lifeline Wellness Center	Planet Fitness	Anytime Fitness	The Roc Gym	Snap Fitness
Adult									
Fitness Assessments			X		X				
Circuit Training							X		
Personal Training	X	X	X	X		X		X	X
Boot Camps									
Aerobics	X	X	X	X	X				
Zumba	X	X			X				
Yoga	X	X	X		X				
Pilates Mat Classes	X		X		X				
Martial Arts	X	X	X	X	X			X	
Kickboxing	X	X						X	
Group Cycling	X	X						X	
Swim Lessons	X	X	X						
Tennis Lessons									
Leagues (Tennis, BB, VB, etc)	X	X							
Water Exercise Classes	X	X	X						
Youth									
Fitness Classes		X	X						
Personal Training	X	X							
Swim Lessons	X	X	X						
Tennis Lessons									
Gymnastics/tumbling		X	X						
Camps		X							
Leagues (Tennis, BB, VB, etc)	X	X							
Special Populations									
Senior Adult Exercise		X	X		X				
Weight Management									
Arthritis Exercise Classes									
Sports Specific Training									
Clinical									
Physical Therapy									
Chiropractic									
Other									
Massage					X				
Nutrition Counseling									
Tanning						X			X
Day Spa									
Hair Salon									
Medical Spa									
Life Coaching									
Alternative Therapies (Acupuncture)									

## COMPETITOR ANALYSIS

### COMPETITOR MEMBERSHIP FEE STRUCTURES – WATERLOO

Membership Rates	Cedar Valley Sportsplex	YMCA	YWCA	River Plaza Athletic Club	Covenant Lifeline Wellness Center	Planet Fitness	Anytime Fitness	The Roc Gym	Snap Fitness
Enrollment	\$0			\$0	\$0	\$5 / \$0			
Individual		\$40	\$35				\$39	\$99 / \$40	\$20
Couple									
Family		\$50							
Senior		\$40							
Senior couple		\$50	\$25						
Youth / college		\$25 / \$25	\$20						
Monthly – No Contract									
Individual	\$41	\$38	\$37	\$42		\$10 / \$19.99		\$25 / \$40	\$34.95
Couple				+\$10					
Family	\$62	\$58							
Senior individual	\$21	\$30							
Senior couple		\$40							
Youth / college	\$21 / \$26	\$18 / \$26	\$20	\$35					
Monthly – 1 Year Contract									
Individual				\$30	\$30		\$35		
Couple				+\$10	\$51		+\$25		
Family					\$56		+\$20		
Senior individual					\$26				
Senior couple					\$39				
Youth / college									
12 Months lump sum									
Individual	\$480		\$298		\$360				
Couple					\$612				
Family	\$720				\$672				
Senior individual	\$240				\$312				
Senior couple					\$468				
Youth / college	\$240 / \$300				\$66 – 3 mon				
Other									
Day Pass	\$5 - \$8				\$8				

## COMPETITOR ANALYSIS

### COMPETITOR FACILITY AND AMENITIES – JESUP AND INDEPENDENCE

Facility Amenities	Jesup Gym	Average Joe's	Therapy & Wellness Connection	Falcon Civic Center	Snap Fitness
Hours of Operation		varies			
Monday – Thursday	8A-7P	based on	5A-9P	5A-9P	24 hours
Friday	8A-6P	exercise	5A-8P	5A-8P	24 hours
Saturday	7A-1P	class	7A-3P	10A-4P	24 hours
Sunday	11A-1P	schedule	11A-4P	closed	24 hours
Baby Sitting			X		
Pro Shop/Retail Area	supplements				
Juice / Sandwich Bar					
Full Service Café					
Conf. / Educational Room(s)					
Massage Rooms (#)			X		
Tanning Beds (#)	6				X
Day Spa					
Hair Salon					
Men's Locker Room	restroom		X	X	restroom
Lounge Area					
Day Lockers (#)			X	X	
Rental Lockers					
Private Showers (#)					
Gang Showers			X	X	
Whirlpool					
Steam Room					
Dry Sauna				coed	
Women's Locker Room (1)	restroom		X	X	restroom
Lounge Area					
Day Lockers (#)			X	X	
Rental Lockers					
Private Showers (#)			?	?	
Gang Showers					
Whirlpool					
Steam Room					
Dry Sauna				coed	
Towel Service					
Family Changing/locker Room					
VIP Locker Room					
Youth Locker Rooms					
Express Lockers (#)					

## COMPETITOR ANALYSIS

Facility Amenities	Jesup Gym	Average Joe's	Therapy & Wellness Connection	Falcon Civic Center	Snap Fitness
Group Exercise Studio (#)		1	1	multi-purpose	
Mind/Body Exercise Studio					
Personal Training Studio					
Group Cycling Studio					
Pilates Reformer Studio					
Martial Arts Studio					
Kickboxing Studio	X				
Weight Machines	X		X	limited	X
Free Weights	X		Limited	limited	X
Stretching / Abdominal Area					
Cardiovascular Exercise Equip.			X	limited	X
Audio/Video system for CV Equip.			X		X
Cardio Cinema Room					
Circuit Training Equip / Stations					
Specialty Equipment (type)					
Women's Only Exercise Rm / Area					
Indoor Lap Pool (size)			4 X 25 yds		
Indoor Recreation Pool					
Indoor Exercise/Therapy Pool			X		
Outdoor Lap Pool (size)				(1)	
Outdoor Recreation Pool				(1)	
Basketball Courts - full / ½ (#)				1 – full	
Gymnastics Apparatus					
Indoor Jogging/walking track (laps/mile)			X		
Outdoor Jogging/walking track					
Racquetball / Squash Courts (#)				2	
Indoor Tennis Courts (#)					
Outdoor Tennis Courts (#)					
Outdoor Sand Volleyball Courts (#)					
Youth Indoor Rec/Play Area					
Youth Outdoor Rec/Play Area					
Game/Party Room				X	
Rock Climbing Wall					
Indoor Sports Fields					
Outdoor Sports Fields (type)					
Batting Cages					
Golf Simulator					
Outdoor "PAR" Workout Course	X				

Note (1): Falcon Civic Center has plans to build an outdoor aquatics park adjacent to the existing center.

# COMPETITOR ANALYSIS

## COMPETITOR PROGRAMS AND SERVICES – JESUP AND INDEPENDENCE

Programs and Services	Jesup Gym	Average Joe's	Therapy & Wellness Connection	Falcon Civic Center	Snap Fitness
Adult					
Fitness Assessments			X		
Circuit Training					
Personal Training			X		X
Boot Camps					
Aerobics		X	X	X	
Zumba		X			
Yoga		X	X		
Pilates Mat Classes		X	X	X	
Martial Arts					
Kickboxing	X	X			
Group Cycling					
Swim Lessons					
Tennis Lessons					
Leagues (Tennis, BB, VB, etc)				X	
Water Exercise Classes			X		
Youth					
Fitness Classes					
Personal Training					
Swim Lessons					
Tennis Lessons					
Gymnastics/tumbling					
Camps					
Leagues (Tennis, BB, VB, etc)				X	
Special Populations					
Senior Adult Exercise			X		
Weight Management					
Arthritis Exercise Classes					
Sports Specific Training					
Clinical					
Physical Therapy					
Chiropractic					
Other					
Massage					
Nutrition Counseling					
Tanning	X				X
Day Spa					
Hair Salon					
Medical Spa					
Life Coaching					

# COMPETITOR ANALYSIS

## COMPETITOR MEMBERSHIP FEE STRUCTURES – JESUP AND INDEPENDENCE

Membership Rates	Jesup Gym	Average Joe's	Therapy & Wellness Connection	Falcon Civic Center	Snap Fitness
Enrollment					
Individual		\$45			\$20
Couple		+\$22			
Family		+\$22 ea.			
Senior					
Senior couple					
Youth / college					
Monthly – No Contract					
Individual	\$34.95 Body Fit classes				\$34.95
Couple					
Family					
Senior individual					
Senior couple					
Youth / college					
Monthly – 1 Year Contract					
Individual			\$35		
Couple			\$56		
Family			\$60		
Senior individual					
Senior couple					
Youth / college					
12 Months lump sum				3/6/12 months	
Individual			\$365	\$50/\$80/\$125	
Couple			\$585		
Family			\$640	\$60/\$100/\$165	
Senior individual				\$40/\$65/\$100	
Senior couple					
Youth / college				\$40/\$65/\$100	
Other					
Day Pass	\$1 \$0 for outdoor equipment		\$5	\$3	

## **ONLINE CONSUMER SURVEY**

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### **SURVEY METHODOLOGY**

Meritage conducted an Internet based community survey using SurveyMonkey© to assess the interest and desires of Jesup residents related to programs, services and facility amenities to be provided in the proposed Center. The City of Jesup promoted participation in the community survey through local media, the city's website and other appropriate communication resources. The purpose of the survey was to determine interest in utilization of the proposed Center, facility and program preferences, and overall price acceptance for participation. The survey link was circulated to residents within the Jesup Schools District, which represents a total population of 5,090, equivalent to 92% of the population within a 7 mile radius. The number of households within the school district is 1,862, which represents 88% of the households within 7 miles.

A total of 520 responses were received. If each respondent represents a household, the overall response rate would be approximately 25%. To the extent that there are multiple responses from each household, the overall response rate would be approximately 10% of the population. Based on Meritage's experience, this is an excellent response rate.

### **SUMMARY OF FINDINGS**

#### **Respondent Profile**

Respondents to the survey are largely female (71%), between the age of 25 and 44 (58%), residing within zip code 60548 (92%), and residing within the Jesup city limits (76%). Approximately one-third (32%) of respondents currently belong to a fitness center.

#### **Likelihood to Use the Fitness Center**

Overall, more than nine in ten (92%) of respondents are likely to use the center if price is no object, with 79% indicating they are very likely to use the center. Respondents report the highest likelihood of use the Center after 5 pm on weekdays (65%) and on weekends (61% on Saturdays and 53% on Sundays). These utilization patterns are consistent with industry norms and with the also reflective of the high percentage of residents in the workforce and the percentage commuting to Waterloo or other communities for employment.

#### **Price Acceptance**

Overall acceptance of the price points tested ranged from 37% for the highest price points to 60% for the lowest monthly price points (\$40 – Individual, \$60 – Family, \$20 – Senior Adult). For individuals, acceptance was the least robust, ranging from 33% for the highest price (\$50 per month) to 50% for the lowest price (\$40 per month). Family interest, which represents nearly two-thirds of those likely to use the Center, was associated with higher acceptance at \$39 for the highest price (\$80 per month) to 63% for the lowest price (\$60 per month).

## ***ONLINE CONSUMER SURVEY***

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### **Preference for Various Center Amenities**

Respondents rated a gymnasium, exercise equipment, outdoor recreational pool and a fitness activity area for children as the most important features, followed by group exercise classes and professionally credentialed staff. These rankings are consistent with fitness industry norms for recreation centers and fitness centers. No significant variances were noted by type of respondent.

### **Preference for Various Programs & Services**

Open gym time for fitness and recreation and programs for children were rated as the most important program offerings. These preferences are consistent with industry norms for recreation centers.

### **Preferences for Location**

The respondents indicated that accessibility by bicycle or by foot were the most important criteria. Close to school or near the center of town were more important than being close to either the soccer complex or the golf course.

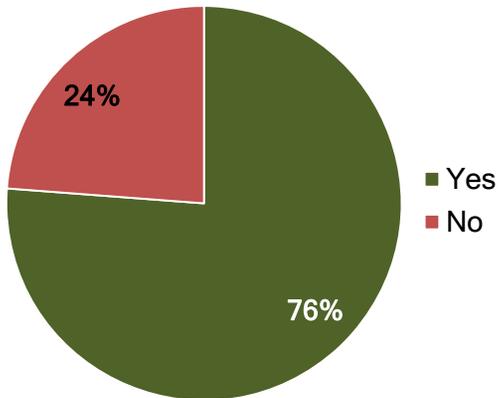
### **Estimated Demand**

Based on analysis of the density and demographic makeup of the market and results of the online survey, the proposed Center could capture 550 monthly fitness members plus an additional 85-100 day pass participants. To maximize the revenues and participation by the community, Meritage recommends the lowest pricing tested for membership (\$40 for Individual, \$60 for Family and \$20 for Senior Adult) and an \$8 rate for day passes for “open” center participation (excluding leagues, clinics and other programs for there is a fee associated).

# CONSUMER SURVEY

## LOCATION OF RESPONDENTS' RESIDENCES

### Jesup City Limits



(N=480)

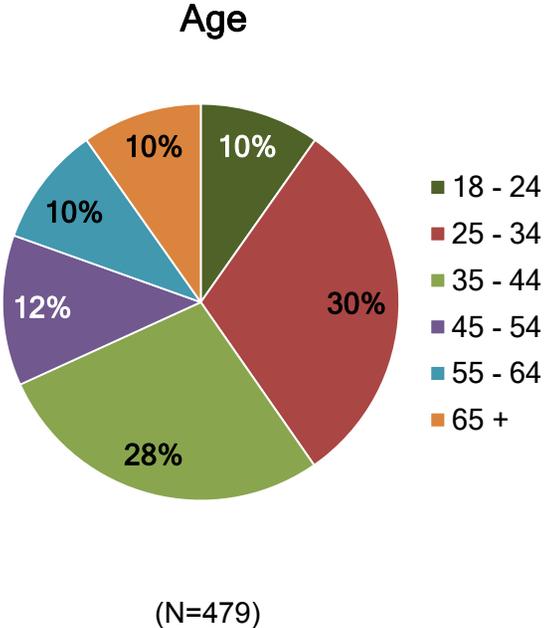
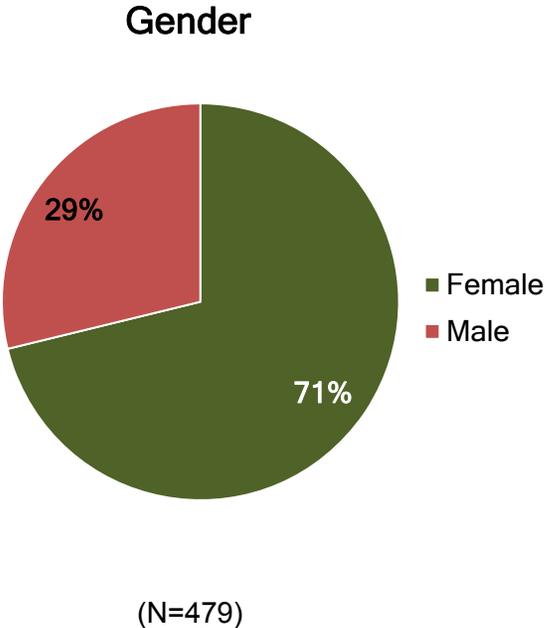
As noted in the chart to the left, approximately three fourths of respondents reside within the city limits of Jesup. The table below shows the zip code distribution of respondents. Approximately 85% of respondents report living in zip code 50648.

Zip Code of Residence	Number
50629	4
50644	11
50648	440
50651	4
50667	3
50703	3
52210	3
Other (less than 3 each)	7
No Response	40

# CONSUMER SURVEY

## GENDER AND AGE OF RESPONDENTS

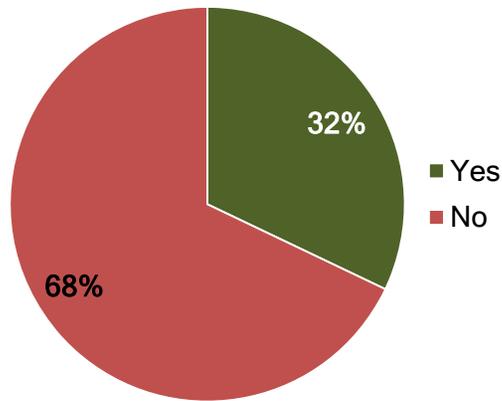
As shown in the charts below, approximately 71% of respondents were women, and 58% of respondents were between the age of 25 and 45.



# CONSUMER SURVEY

## CURRENT MEMBER STATUS

Current Member Status



(N=483)

As shown in the chart to the left, approximately one-third of respondents are currently members of a fitness center. The table below shows which centers the respondent are affiliated with and the percentage affiliated with each center. Some respondents are affiliated with more than one center.

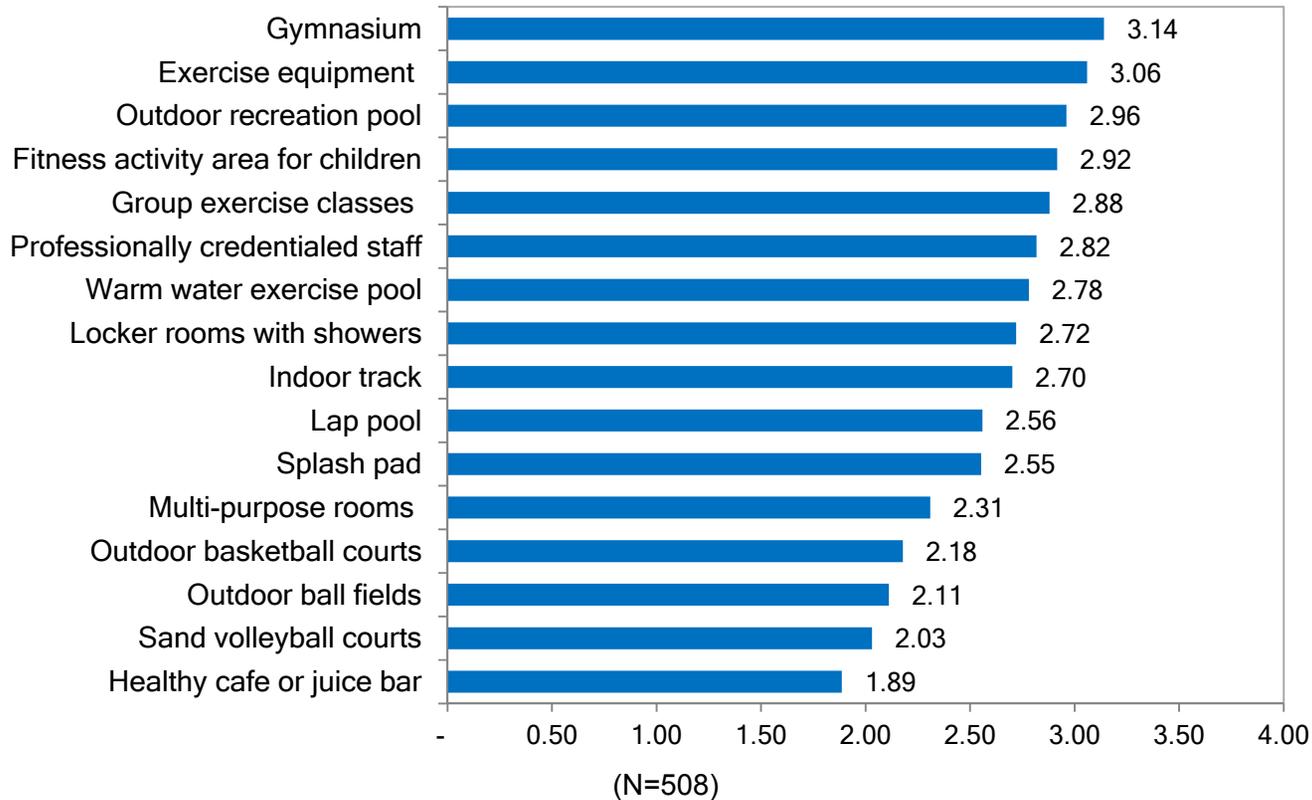
Fitness Center	Number
Average Joe's	33%
Jesup Gym	18%
Planet Fitness - Waterloo	14%
Buchanan County Wellness Center	11%
Cedar Valley Sportsplex	4%
ROC	4%
YMCA	4%
Snap Fitness	3%
BodyFit	2%
Covenant Wellness Center	2%
Other Centers (less than 2% each)	12%

# CONSUMER SURVEY

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## PREFERENCES FOR FACILITY AMENITIES

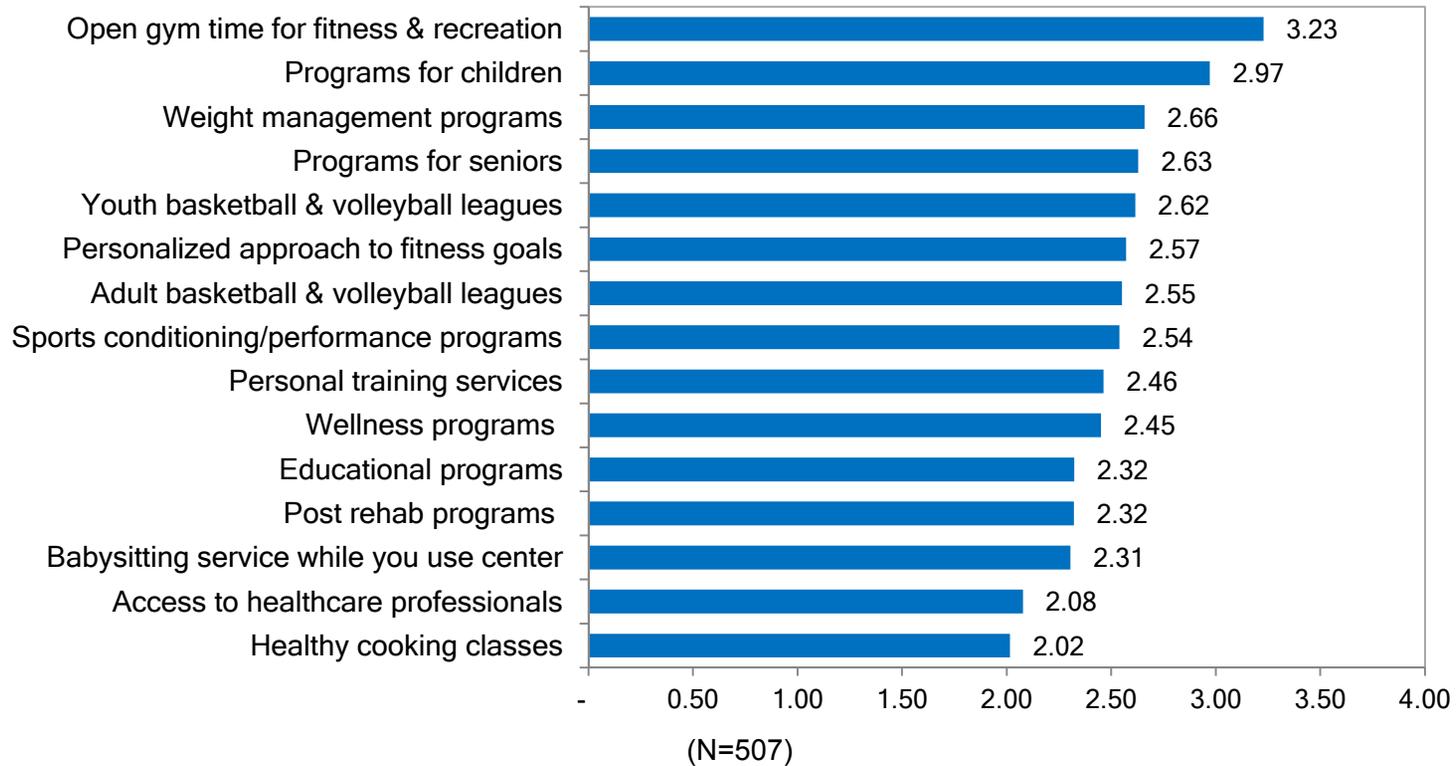
Respondents were asked to indicate the importance of a number of amenities as factors when choosing to join a wellness or recreation center. A gymnasium, exercise equipment, outdoor recreational pool and a fitness activity area for children were considered most important by respondents. The chart below shows the relative importance of factors tested. Not all respondents answered this question.



# CONSUMER SURVEY

## PREFERENCES FOR PROGRAMS & SERVICES

Respondents were asked to indicate the importance of a number of programs and services as factors when choosing to join a wellness or recreation center. Open gym time for fitness and recreation and programs for children were rated as the most important program offerings. The chart below shows the relative importance of factors tested. Not all respondents answered this question.

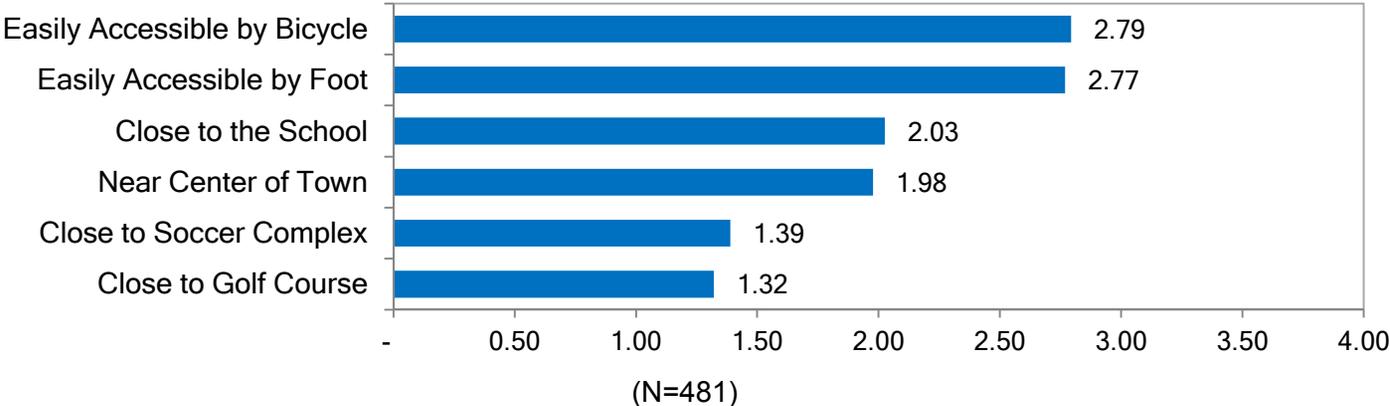


# CONSUMER SURVEY

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## LOCATION PREFERENCES

When asked about location, accessibility by bicycle or by foot were most important to respondents. Close to school or near the center of town were more important than being close to either the soccer complex or the golf course.

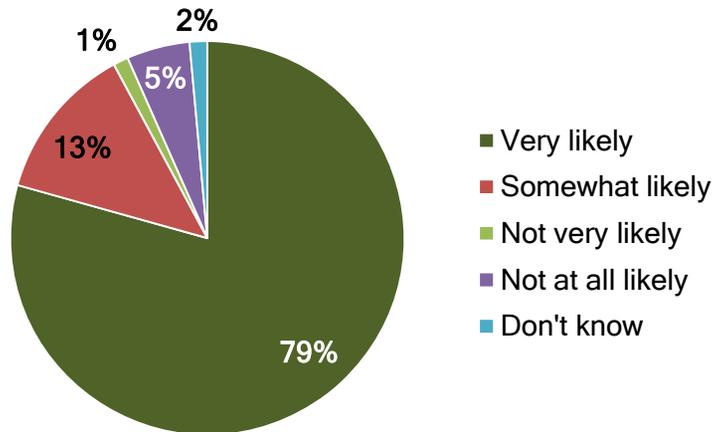


# CONSUMER SURVEY

## LIKELIHOOD OF UTILIZATION/PATTERN OF UTILIZATION

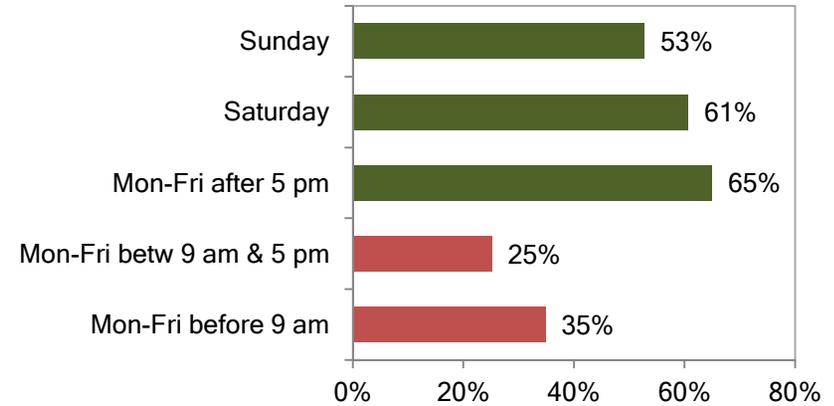
As shown below, nearly eight in ten respondents (79%) are very likely to use the Center. Respondents are most likely to use the Center after work on weekdays (65%), Saturday (61%) or Sunday (53%). These percentages for utilization times add to more than 100% as multiple answers were permitted. The daily utilization pattern is reflective of the high percentage of residents in the workforce and the high percentage who commute to Waterloo or other communities for work.

### Likelihood to Use Center



(N=484)

### Utilization Pattern



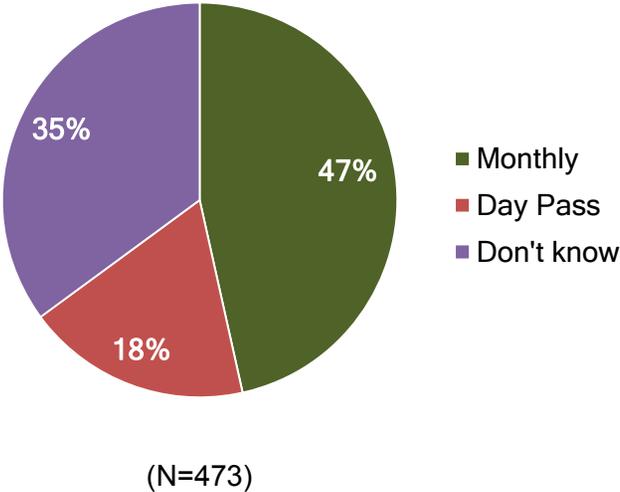
(N=468)

# CONSUMER SURVEY

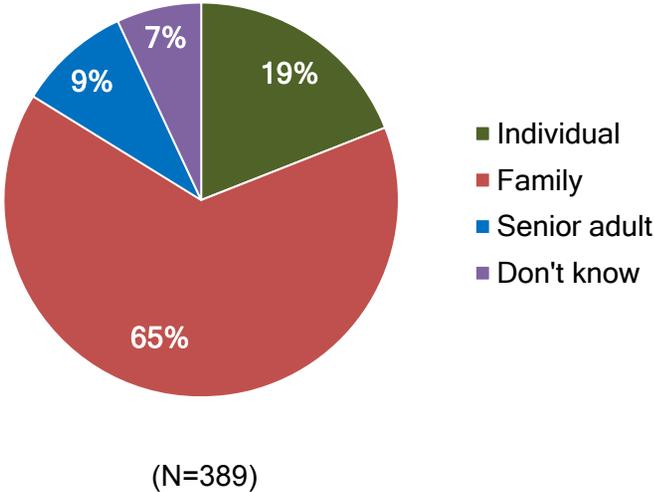
## METHOD OF PARTICIPATION

As shown below, nearly half of respondents (47%) prefer to participate with a monthly membership, while nearly two in ten respondents (18%) prefer a day pass and more than one third (35%) are not sure. For those who prefer a monthly membership, nearly two-thirds (65%) prefer family membership.

### Utilization Preference



### Membership Type

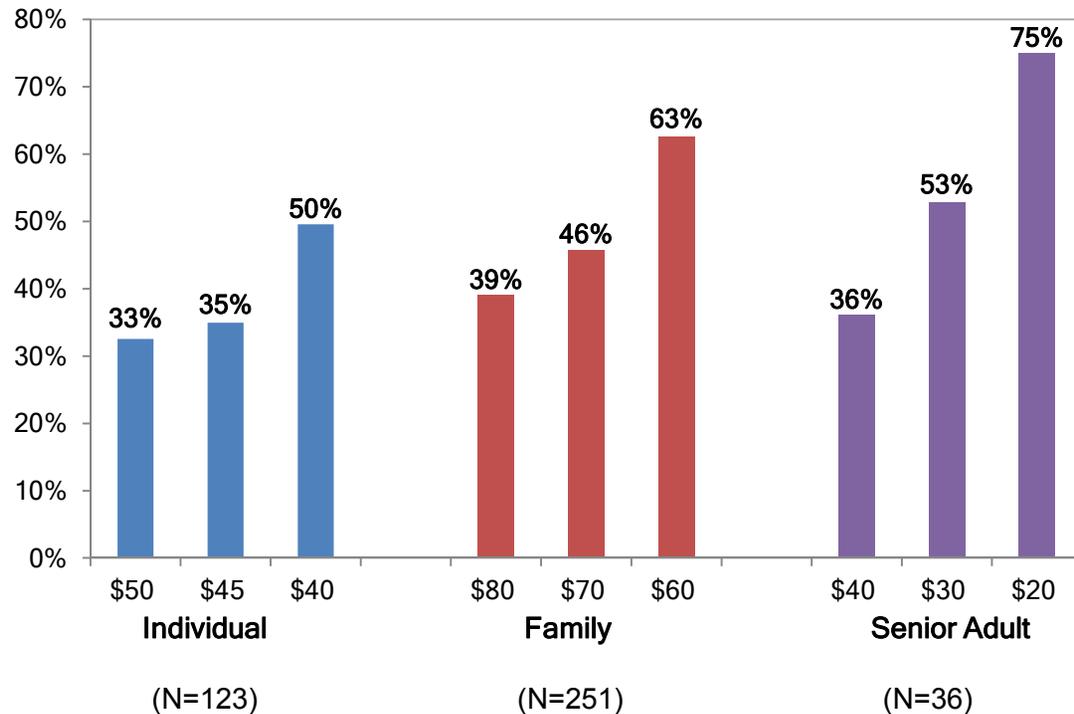


# CONSUMER SURVEY

## PRICING ACCEPTANCE

Overall acceptance of the price points tested ranged from 37% for the highest price points to 60% for the lowest price points. For individuals, acceptance was the least robust, ranging from 33% for the highest price to 50% for the lowest price. Family interest, which represents nearly two-thirds of those likely to use the Center, was associated with higher acceptance at \$39 for the highest price to 63% for the lowest price.

Pricing Accepted by Membership Preference



## ***MEMBER PROJECTIONS & REVENUE POTENTIAL***

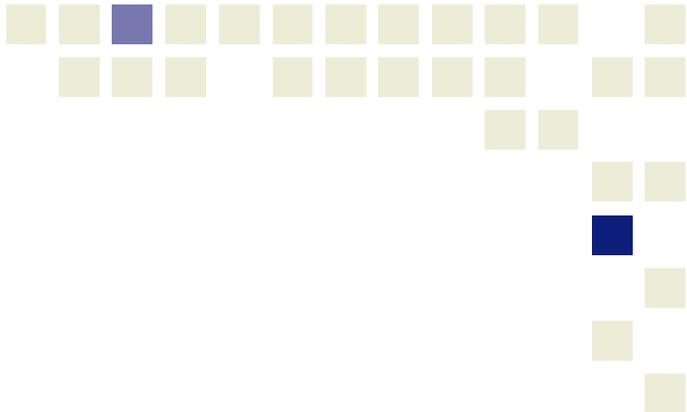
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### **REVENUE POTENTIAL**

Monthly memberships were the most popular form of participation, with nearly half (47%) indicating that preference. More than one-third did not know whether they would be more likely to participate as a member or as a daily pass user. The number of memberships and the related revenue potential, based on member type preference and price acceptance, are shown in the table below. Since some of the respondents represent families (more than one participant per household), and based on the price acceptance as shown below, the number of total monthly member participants that would be captured each price point is as follows: 340 members at the highest prices, 400 at the mid-level prices, and 550 at the lowest prices. At the lowest price points, the Center would generate the highest level of participation and the highest revenues from annual dues, approximately \$148,800. These estimates include residents of the Primary Market area only.

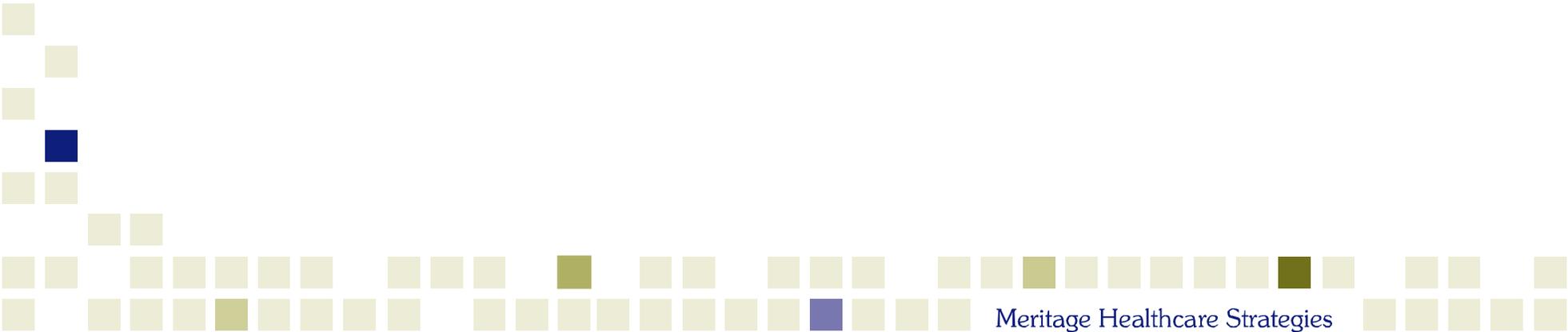
<b>Highest Price Points</b>				
<b>Revenues</b>	<b>Memberships</b>	<b>Price</b>	<b>Acceptance</b>	<b>Revenues</b>
Individual	123	\$50	33%	\$24,000
Family	251	\$80	39%	\$94,080
Senior	36	\$40	36%	\$6,240
<b>Total</b>	<b>410</b>			<b>\$124,320</b>
<b>Mid-Level Price Points</b>				
<b>Revenues</b>	<b>Memberships</b>	<b>Price</b>	<b>Acceptance</b>	<b>Revenues</b>
Individual	123	\$45	35%	\$23,220
Family	251	\$70	46%	\$96,600
Senior	36	\$30	53%	\$6,840
<b>Total</b>	<b>410</b>			<b>\$126,660</b>
<b>Lowest Price Points</b>				
<b>Revenues</b>	<b>Memberships</b>	<b>Price</b>	<b>Acceptance</b>	<b>Revenues</b>
Individual	123	\$40	50%	\$29,280
Family	251	\$60	63%	\$113,040
Senior	36	\$20	75%	\$6,480
<b>Total</b>	<b>410</b>			<b>\$148,800</b>

In addition to monthly dues participants, we expect some day pass users. Approximately 18% indicate that preference, which would result in 85 – 100 additional intermittent users. At \$8 per day for a day pass and approximately 25 visits per person, the revenues associated with day passes would be between \$17,000 and \$20,000.



**JESUP WELLNESS & FITNESS CENTER**

**APPENDIX – SEGMENT ANALYSIS OF SURVEY RESPONDENTS**



## Jesup Community Wellness and Recreation Center Survey

Segment Analysis									
	All Respondents	Age Segments						City/Non-City	
		Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65+	Jesup City Limits	Outside City Limits
<b>Number of Respondents</b>	<b>520</b>	<b>47</b>	<b>147</b>	<b>134</b>	<b>59</b>	<b>47</b>	<b>47</b>	<b>365</b>	<b>114</b>
<b>Facility Preferences</b>	<b>Avg Rank</b>	<b>Avg Rank</b>							
Gymnasium	<b>3.14</b>	<b>3.51</b>	3.25	3.32	3.17	2.57	2.18	<b>3.15</b>	3.03
Exercise equipment	<b>3.06</b>	<b>3.44</b>	3.11	3.06	3.00	2.85	2.74	3.01	<b>3.17</b>
Outdoor recreation pool	<b>2.96</b>	2.87	<b>3.30</b>	3.15	3.05	2.57	1.79	<b>3.00</b>	2.92
Fitness activity area for children	<b>2.92</b>	2.91	<b>3.29</b>	3.00	2.64	2.43	2.18	2.89	<b>3.00</b>
Group exercise classes	<b>2.88</b>	2.89	<b>3.05</b>	2.67	3.03	2.70	2.83	2.81	<b>3.04</b>
Professionally credentialed staff	<b>2.82</b>	<b>3.11</b>	2.87	2.66	2.79	2.74	2.90	2.80	<b>2.86</b>
Warm water exercise pool	<b>2.78</b>	2.72	2.80	2.74	2.81	2.70	<b>2.89</b>	2.76	<b>2.86</b>
Locker rooms with showers	<b>2.72</b>	<b>2.94</b>	2.82	2.58	2.73	2.53	2.66	2.67	<b>2.84</b>
Indoor track	<b>2.70</b>	<b>2.87</b>	2.78	2.71	2.70	2.70	2.35	2.68	<b>2.82</b>
Lap pool	<b>2.56</b>	2.47	<b>2.72</b>	2.58	2.54	2.43	2.14	2.55	<b>2.57</b>
Splash pad	<b>2.55</b>	2.26	<b>3.09</b>	2.58	2.36	2.13	1.68	<b>2.56</b>	2.55
Multi-purpose rooms	<b>2.31</b>	2.30	<b>2.51</b>	2.21	2.38	2.26	1.79	<b>2.31</b>	2.28
Outdoor basketball courts	<b>2.18</b>	<b>2.49</b>	2.26	2.20	2.28	1.80	1.64	2.17	<b>2.19</b>
Outdoor ball fields	<b>2.11</b>	<b>2.66</b>	2.19	2.23	2.09	1.64	1.46	2.09	<b>2.18</b>
Sand volleyball courts	<b>2.03</b>	<b>2.78</b>	2.29	1.98	1.90	1.57	1.33	2.01	<b>2.15</b>
Healthy cafe or juice bar	<b>1.89</b>	<b>2.53</b>	2.05	1.68	1.81	1.53	1.60	<b>1.92</b>	1.73

Note: Shaded cells represent segment which rated attribute the highest.

## Jesup Community Wellness and Recreation Center Survey

Segment Analysis									
	All Respondents	Age Segments						City/Non-City	
		Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65+	Jesup City Limits	Outside City Limits
<b>Number of Respondents</b>	<b>520</b>	<b>47</b>	<b>147</b>	<b>134</b>	<b>59</b>	<b>47</b>	<b>47</b>	<b>365</b>	<b>114</b>
<b>Program Preferences</b>	<b>Avg Rank</b>	<b>Avg Rank</b>							
Open gym time for fitness &	3.23	<b>3.57</b>	3.39	3.32	3.12	2.91	2.42	<b>3.23</b>	3.16
Programs for children	2.97	2.91	<b>3.37</b>	3.14	2.72	2.37	2.10	2.96	<b>3.02</b>
Weight management programs	2.66	<b>3.02</b>	2.75	2.38	2.90	2.64	2.51	2.64	<b>2.70</b>
Programs for seniors	2.63	2.83	2.51	2.34	2.86	<b>3.02</b>	2.98	<b>2.66</b>	2.53
Youth basketball & volleyball leagues	2.62	<b>2.98</b>	2.87	2.69	2.49	2.17	1.83	2.62	<b>2.64</b>
Personalized approach to fitness	2.57	<b>2.96</b>	2.73	2.31	2.91	2.47	2.10	2.56	<b>2.62</b>
Adult basketball & volleyball leagues	2.55	<b>3.15</b>	2.78	2.52	2.56	2.20	1.58	<b>2.57</b>	2.51
Sports conditioning/performance	2.54	<b>3.15</b>	2.56	2.52	2.71	2.30	1.76	2.52	<b>2.55</b>
Personal training services	2.46	<b>2.98</b>	2.65	2.20	2.64	2.26	2.14	2.46	<b>2.51</b>
Wellness programs	2.45	2.68	2.28	2.18	2.79	<b>2.74</b>	<b>2.74</b>	<b>2.46</b>	2.38
Health educational programs	2.32	<b>2.64</b>	2.30	2.14	2.50	2.53	2.26	2.31	<b>2.37</b>
Post rehab programs	2.32	2.61	2.27	1.99	2.57	<b>2.62</b>	2.57	<b>2.33</b>	2.30
Babysitting service	2.31	2.43	<b>2.95</b>	2.19	1.84	1.81	1.50	2.28	<b>2.39</b>
Access to healthcare professionals	2.08	<b>2.39</b>	2.07	1.88	2.24	2.13	2.12	2.07	<b>2.10</b>
Healthy cooking classes	2.02	<b>2.26</b>	2.13	1.78	2.24	2.02	1.71	<b>2.01</b>	2.00

Note: Shaded cells represent segment which rated attribute the highest.

## Jesup Community Wellness and Recreation Center Survey

Segment Analysis									
	All Respondents	Age Segments						City/Non-City	
		Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65+	Jesup City Limits	Outside City Limits
<b>Number of Respondents</b>	<b>520</b>	<b>47</b>	<b>147</b>	<b>134</b>	<b>59</b>	<b>47</b>	<b>47</b>	<b>365</b>	<b>114</b>
<b>Likelihood to Use Center</b>	<b>Avg Rank</b>	<b>Avg Rank</b>							
Very likely	<b>79.3%</b>	83.0%	86.1%	<b>89.6%</b>	78.0%	59.6%	46.7%	78.1%	<b>83.2%</b>
Somewhat likely	<b>12.8%</b>	14.9%	11.8%	6.7%	10.2%	<b>25.5%</b>	24.4%	<b>13.3%</b>	12.4%
Not very likely	<b>1.2%</b>	0.0%	0.7%	0.7%	0.0%	2.1%	<b>6.7%</b>	<b>1.7%</b>	0.0%
Not at all likely	<b>5.2%</b>	2.1%	0.7%	2.2%	10.2%	12.8%	<b>13.3%</b>	<b>5.8%</b>	1.8%
Don't know	<b>1.4%</b>	0.0%	0.7%	0.7%	1.7%	0.0%	<b>8.9%</b>	1.1%	<b>2.7%</b>

Note: Shaded cells represent segment which rated attribute the highest.