04

MARKET ANALYSIS

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Upper Arlington Community Center Feasibility Study

MARKET ANALYSIS

1.1 DEMOGRAPHIC ANALYSIS

The Demographic Analysis provides an understanding of the population within the City of Upper Arlington, Ohio. This analysis is reflective of the City's total population, and its key characteristics such as age segments, income levels, race, ethnicity, and gender. Upper Arlington's demographic figures are then compared to the US population. This type of analysis allows Upper Arlington to see how their population compares on a national scale.

It is important to note that future projections are all based on historical patterns and unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

1.1.1 DEMOGRAPHIC OVERVIEW

The total population of the City has recently experienced an increase of approximately 6.25%, from 33,771 in 2010 to 35,794 in 2017. The current estimated population is projected to continue with slightly lower growth rate, increasing to 37,311 individuals in 2022, and 40,327 by 2032.

According to U.S. Census reports, the total number of households in the target area has experienced a coinciding upward trend, increasing roughly 5.88%, from 13,754 in 2010 to 14,518 in 2017. The City's total households are expected to continue its average growth increasing to 16,281 households by 2032.

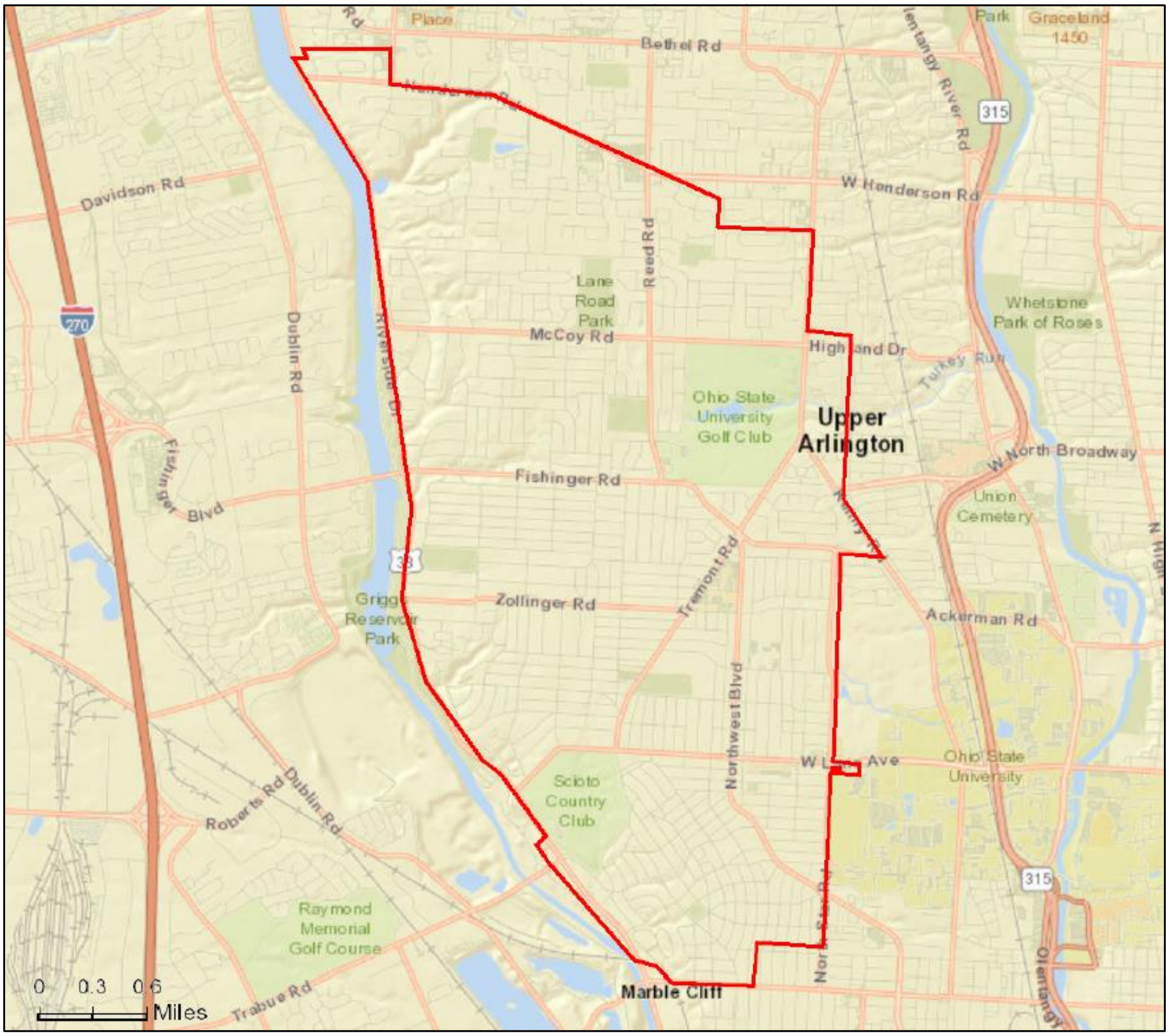
Based on the 2010 Census, the population of the target area is above (42.9 years) the median age of the U.S. (37.1 years). Projections show that the service area will undergo an aging trend throughout 2032, as the 55+ age segment grows to 42% of the total population.

The current 2017 population of the service area is predominantly White Alone (90%), with the Asian (7%) population representing the largest minority. Future projections show that by 2032 the overall composition of the population will become more diverse. Forecasts of the target area through 2032 expect a decrease amongst the White Alone (86%) population; coinciding with increases amongst the Asian and Some Other Race populations. Based on the 2010 Census projections, those of Hispanic/Latino origin currently represent only 2% of the City's total population.

The City's median household income ($104,153) and per capita income ($58,983) are both above the state and national averages.

1.1.2 METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in July 2017 and reflects actual numbers as reported in the 2010 Censuses, and estimates for 2017 and 2022 as obtained by ESRI. Straight-line linear regression was utilized for projected 2027 and 2032 demographics. The boundaries that were utilized for the demographic analysis are shown below in **Figure 1**.



RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

- American Indian – This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian – This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black – This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander – This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White – This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino – This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

1.1.3 CITY OF UPPER ARLINGTON POPULACE

POPULATION

The City's population has recently experienced a slightly above national average growing trend in recent years (0.89% per year), with the total population increasing roughly 6.25% since 2010. Similarly, the total number of households has also increased in recent years (0.84% since 2010). These are both above the average national growth rates for population and households **(See Figures 2 & 3)**.

Currently, the population is estimated at 35,794 individuals living within 14,518 households. Projecting ahead, the total population and total number households are both expected to continue to grow over the next 15 years. Based on predictions through 2032, the City is expected to have about 40,327 residents living within 16,281 households.

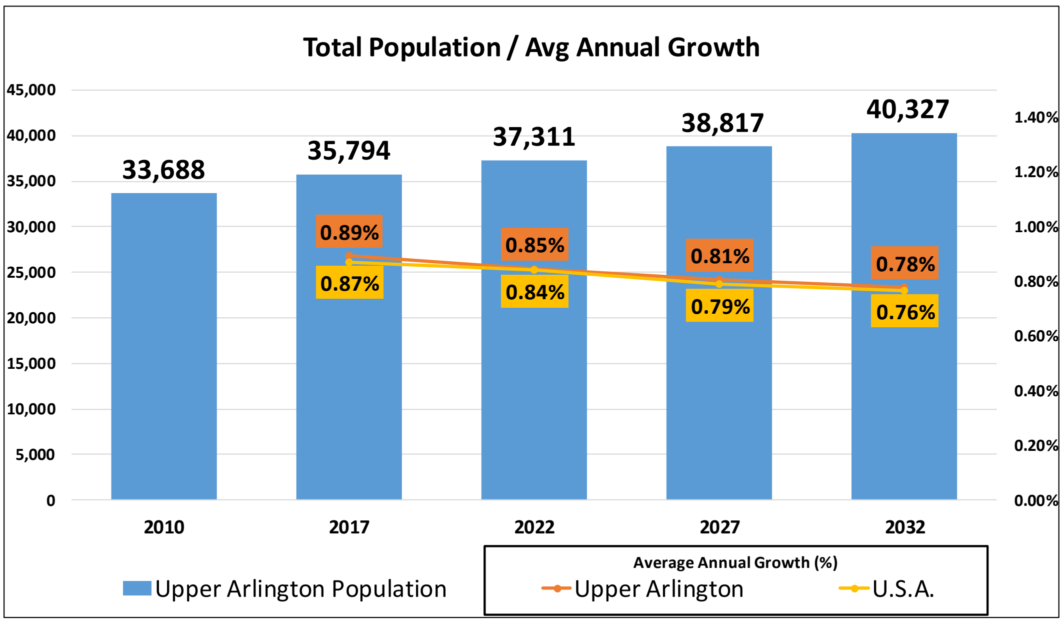


Figure 2: City of Upper Arlington Total Population

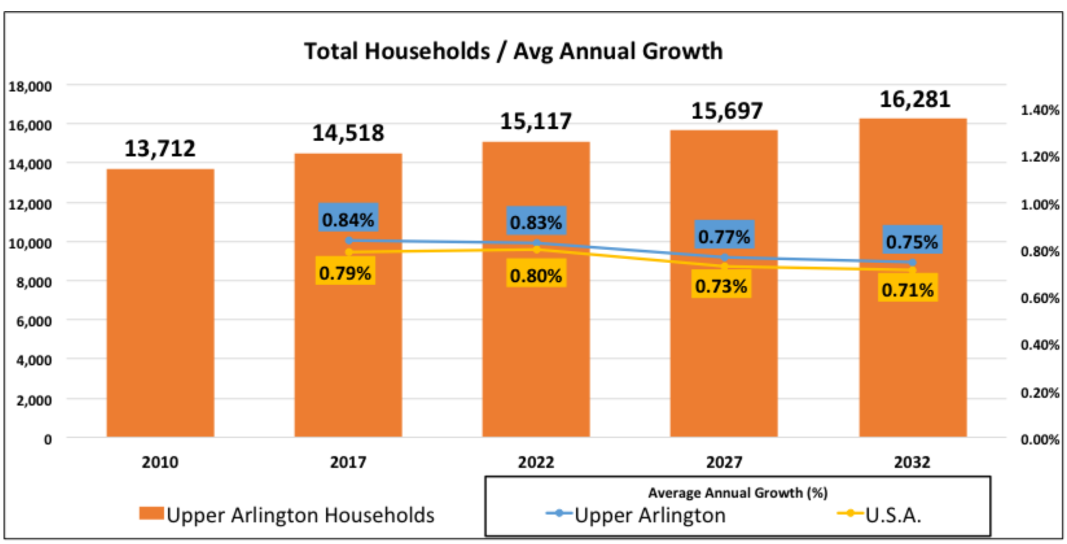


Figure 3: City of Upper Arlington Total Number of Households

AGE SEGMENT

Evaluating the population by age segments, the City exhibits a relatively skewed distribution when compared to the US. When looking at the country as a whole, the median age of the U.S. is 38.2 years old, with 46% of its population being under the age of 35. Upper Arlington's population is much older, having a median age of 44.6 years old and 35% of its residents currently above the age of 55.

When looking at Upper Arlington's population as a whole, the City is projected to undergo an aging trend. While most age segments are expected to remain stagnant or experience decreases in population percentage, 18-34 age segment is projected to increase by 4% and the 55+ age segments are expected to continue increasing over the next 15 years. The City of Upper Arlington is projected to continue aging; resulting in 42% of its total population being over the age of 54 by 2032. This is partially assumed to be an outcome of the Baby Boomer generation aging into the senior age groups (**Figure 4).**

As the Baby Boomer generation ages, the population of the United States over the age of 55 will continue to grow. Due to the growth of this age segment and increasing life expectancy, it is useful to further segment the "Senior" population beyond the traditional 55+ designation.

Within the field of parks & recreation, there are two different ways to partition this age segment. One is to simply segment by age: 55-64; 65-74; and 75+. However, as these age segments are reached, variability of health and wellness can be marked. For example, a 57-year-old may be struggling with rheumatoid arthritis and need different recreation opportunities than a healthy 65-year old who is running marathons once a year. Therefore, it may be more useful to divide this age segment into "Active," "Low-Impact," and/or "Social" Seniors.

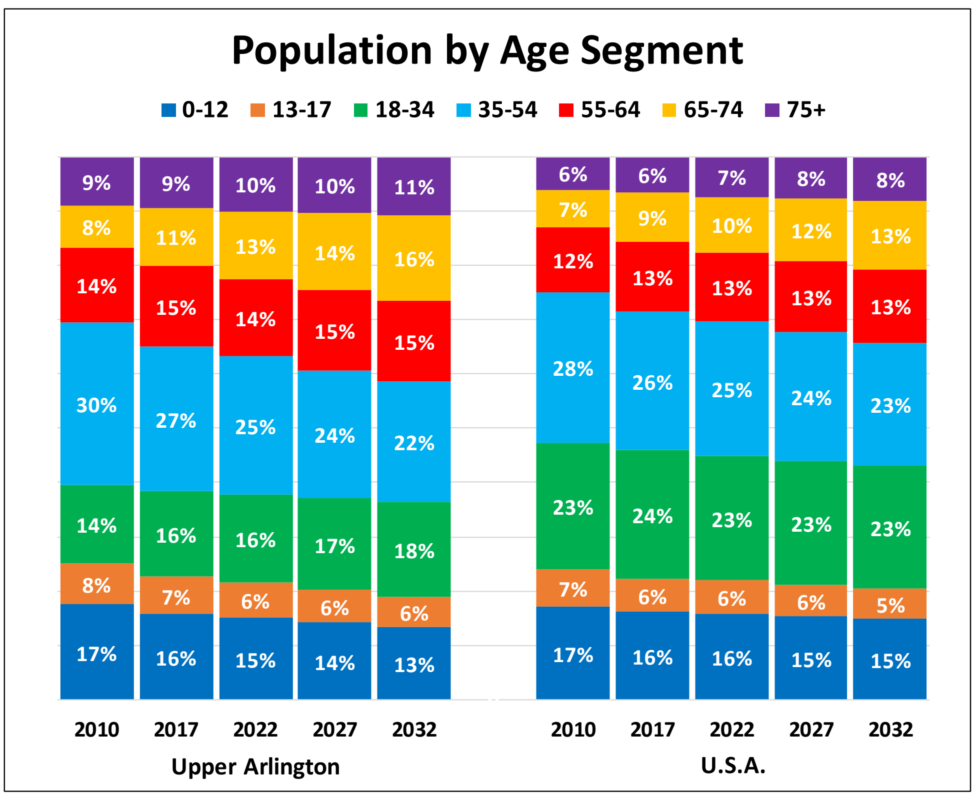
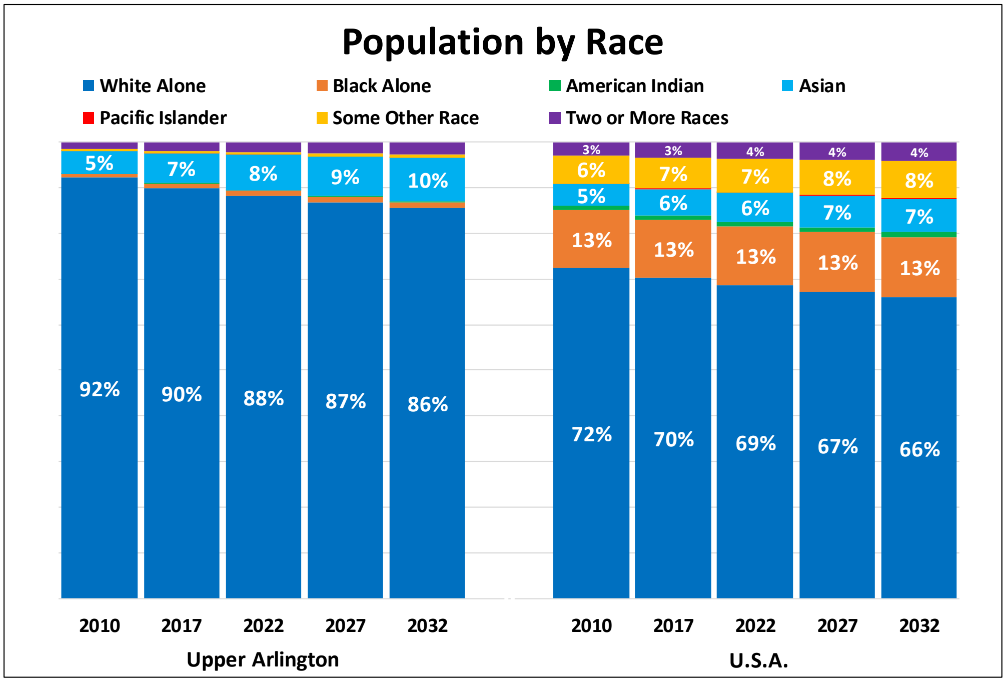


Figure 4: Population Age by Segments

Race and Ethnicity

In analyzing race, the service area's current population is predominately White Alone. The 2017 estimate shows that 90% of the population falls into the White Alone category, while the Asian category (7%) represents the largest minority. The predictions for 2032 expect the population by race to become slightly more diverse. There is expected to be an increase in the Asian population; accompanied by a decrease in the White Alone population (**Figure 5**). Based on the 2010 Census, those of Hispanic/Latino origin currently represent only 2% of the service area's total population. The Hispanic/Latino population is expected to experience a slight increase in population percentage (3%) by 2032 (**Figure 6**).



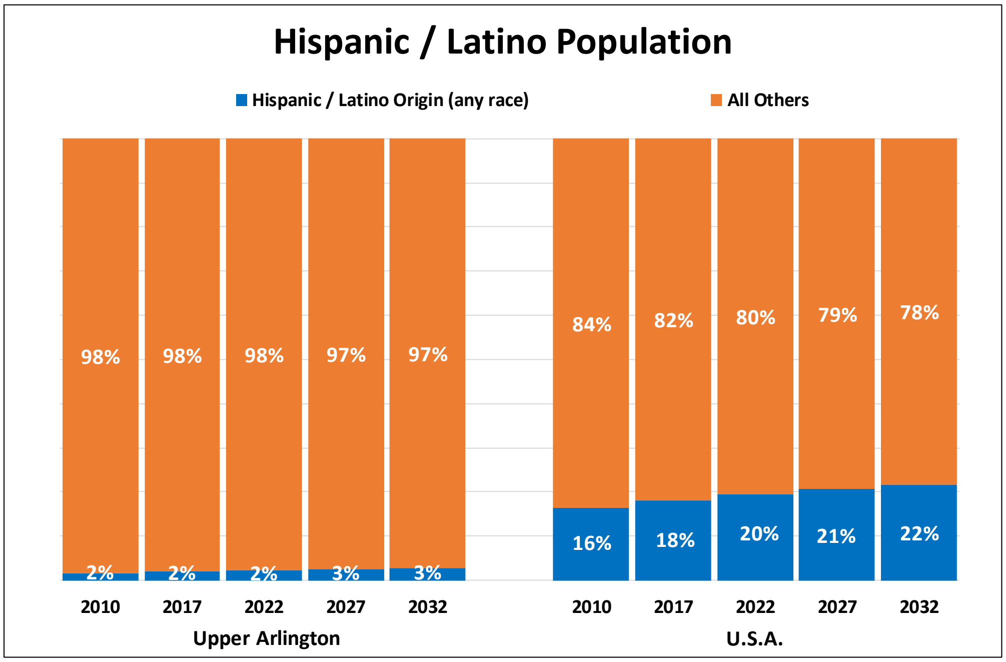


Figure 6: Population by Ethnicity

HOUSEHOLD INCOME

As seen in **Figure 7**, the City's median household income ($104,153) and per capita income ($58,983), are approximately double the size of both state and national levels. This is a strong indicator of the presence of disposable income. This means Upper Arlington's residents are more likely to desire best-in-class facilities and be willing to pay for them compared to the average U.S. citizen.

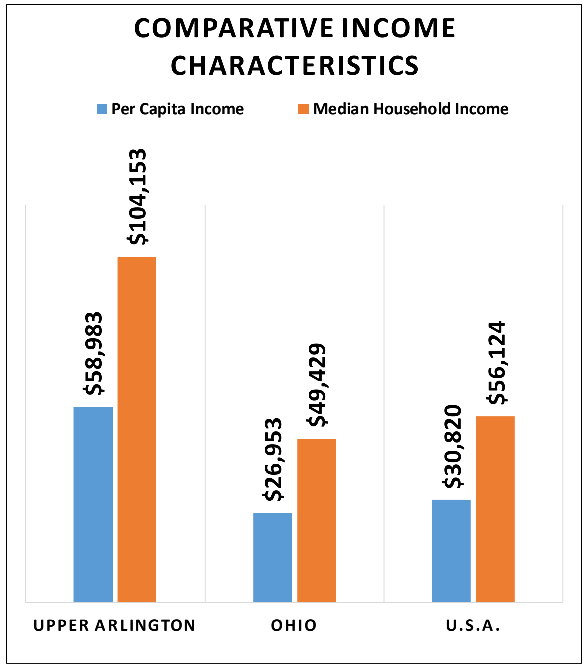
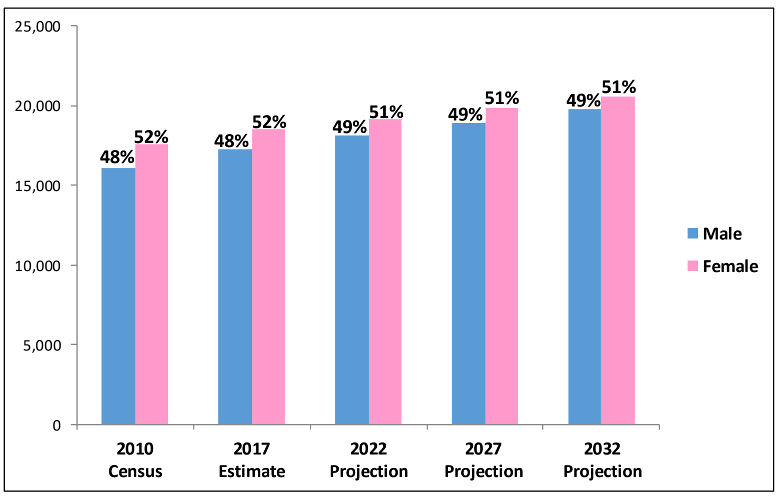


Figure 7: Comparative Income Characteristics



POPULATION BY GENDER

The City of Upper Arlington currently has a slightly higher population of females (51.0%) compared to males (49.0%), as shown in **Figures 8.** This gap is expected to shrink over the next fifteen years.

With parks and outdoor sports facilities, women and men have slightly different preferences in amenities. Women generally favor group classes, teams, and programs, while men generally seek team sport opportunities as well as opportunities for individual training; such as with outdoor exercise equipment and individual sport amenities. However, this gap is narrowing. In general, women tend to be more sensitive to crowding, so design considerations for the optimal combination of facilities and users is important[1].

1.Kaczynski AT, Potwarka LR, Smale BJA, Havitz ME: Association of parkland proximity with neighborhood and park-based physical activity: variations by gender and age. Leis Sci. 2009, 31: 174-191. 10.1080/014904008026860

1.2 TRENDS ANALYSIS

The following tables summarize the findings from the Sports & Fitness Industry Association's (SFIA) 2017 Sports, Fitness and Leisure Activities Topline Participation Report, as well as the local market potential index data, which compares the demand for recreational activities and spending of residents for the targeted area to the national averages.

Summary of National Participatory Trends Analysis
1. Number of "inactives" decreased slightly, those 'active to a healthy level' on the rise a. "Inactives" down 0.2% in 2016, from 81.6 million to 81.4 million b. Approximately one-third of Americans (ages 6+) are active to a healthy level
2. Most popular sport and recreational activities a. Fitness Walking (107.9 million) b. Treadmill (52 million) c. Hand Weights (51.5 million)
3. Most participated in sports a. Golf (24.1 million in 2015) b. Basketball (22.3 million) c. Tennis (18.1 million)
4. Activities most rapidly growing over last five years a. Stand-Up Paddling - up 180% b. Adventure Racing - up 149.5% c. Non-traditional/Off-road Triathlon - up 108.2% d. Rugby - up 82.4% e. Boxing for competition - up 62%
5. Activities most rapidly declining over last five years a. In-line Roller Skating - down 27.8% b. Touch Football - down 26% c. Ultimate Frisbee - down 24.5% d. Jet Skiing - down 23.6% e. Water Skiing - down 20%

Summary of Local Market Potential Index Analysis
1. The City exhibits above average market potential for fitness, outdoor and commercial recreational activities
2. Top recreational activities in Upper Arlington compared to the national averages a. Went to art gallery in the last 12 months (MPI-187) b. Went to museum in the last 12 months (MPI-164) c. Hiking (MPI-158)

1.2.1 METHODOLOGY

The Sports & Fitness Industry Association's (SFIA*) Sports, Fitness & Recreational Activities Topline Participation Report 2017* was utilized to evaluate national sport and fitness participatory trends. The study is based on survey findings carried out in 2016 and the beginning of 2017 by the Physical Activity Council, which conducted a total of 24,134 online interviews – 11,453 individual and 12,681 household surveys. A sample size of 24,134 completed interviews is considered by SFIA to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.31 percentage points under 95 percent confidence interval. Using a weighting technique, the total population figure used in this study is 296,251,344 people (ages six and older). The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the US.

CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency. Core participants have higher participatory frequency thresholds than casual participants. The thresholds vary among different categories of activities. For instance, core participants engage in most fitness and recreational activities more than 50 times per year, while for sports, the threshold for core participation is typically 13 times per year. Core participants are more committed and less likely to switch to other fitness or sport activities or become inactive (engage in no physical activity) than causal participants. For instance, the most popular activity in 2016, fitness walking, has twice the core participants than causal participants. This may also explain why activities with more core participants tend to experience less pattern shifts than those with larger groups of casual participants.

INTENSITY OF ACTIVITY

SFIA also categorizes participation rates by the intensity of activity levels, dividing into five categories based on the caloric implication (i.e., high calorie burning, low/med calorie burning, or inactive) and the frequency of participation (i.e., 1-50 times, 50-150 times, or above) for a given activity. This entails participation rates classified as 'super active' or 'active to a healthy level' (high cal burning, 151+ times), 'active' (high cal burning, 50-150 times), 'casual' (high cal burning, 1-50 times), 'low/med calorie burning', and 'inactive'. These participation rates are then assessed based on the total population trend over the last five years, as well as breaking down these rates by generation.

1.2.2 OVERVIEW

Information available through SFIA reveals that overall activity participation increased 0.3% from 2015 to 2016. General fitness sports had the most gain in participation, increasing 2% over the past year. The most popular fitness activities in 2016 include: fitness walking, treadmill, free weights, running/jogging, and stationary cycling. Most of these activities appeal to both young and old alike, can be done in various environments, are enjoyed regardless of level of skill, and have minimal economic barriers to entry. These popular activities also have appeal because of their social application. For example, although fitness activities are mainly self-directed, people enjoy walking and biking with other individuals because it can offer a degree of camaraderie.

FITNESS WALKING REMAINS MOST PARTICIPATED IN ACTIVITY

Fitness walking has remained the past decade's most popular activity by a large margin, in terms of total participants. Fitness walking participation last year was reported to be 107.9 million Americans. Although fitness walking has the highest level of participation, it did report a 1.8% decrease in 2016 from the previous year. This recent decline in fitness walking participation paired with upward trends in a wide variety of other activities, especially in fitness and sports, may suggest that active individuals are finding new ways to exercise and diversifying their recreational interests.

OUTDOOR AND ADVENTURE RECREATION ON THE RISE

In addition, the popularity of many outdoor and adventure activities have experienced strong positive growth based on the most recent findings. In 2016, outdoor activities that experienced the most growth in overall participation were BMX bicycling, day hiking, traditional climbing, and recreational vehicle camping. BMX bicycling, traditional climbing, as well as adventure racing also underwent rapid growth over the past five years. The sharp incline in participation rates for outdoor and adventure recreation is of particular interest to park planners due to the volatility of activities in the 'take-off' stage with relatively low user bases. It will be important to closely monitor these activities as they continue to mature in their lifecycles to recognize trends of sustained growth, plateauing, or eventual decline.

SPORTS PARTICIPATION

Assessing participation in traditional team sports, basketball ranks highest among all sports, with approximately 22.3 million participants in 2016. Sports that have experienced significant growth in participation are rugby, boxing, roller hockey, squash, lacrosse, cheerleading, and field hockey – all of which have experienced growth in excess of 30% over the last five years. More recently, gymnastics, rugby, sand volleyball, Pickleball, and cheerleading were the general sports activities with the most rapid growth.

In general, team sports are on the rise, increasing by 2% from 2015 and averaging a 5% over the past three years. The growth is mostly ascribed to niche sports that are gaining popularity, such as rugby and gymnastics. From 2011 to 2016, racquet sports also steadily increased by 3% on average. On the other hand, individual sports experienced consistent decline over the past five years. Most recently, the decline in individual sports is due to decreasing participation in boxing for fitness, boxing for competition, ice skating, in line roller skating, and triathlons.

INACTIVITY RATES AND INTENSITY OF ACTIVITY

According to the Physical Activity Council, "inactivity" is defined to include those participants who reported no physical activity in 2016. Over the last five years, the number of inactive individuals has increased from 78.8 million in 2011 to 81.4 million in 2016. However, assessing the most recent year, from 2015 to 2016, the US saw a slight decrease of 0.2% from 81.6 to 81.4 million inactive individuals. Although this recent shift is very promising, inactivity remains a dominant force in society; evidenced by the fact that 27.5% of the US population is considered inactive.

On the contrary, in 2016, 31.7% of the total population (ages 6+) reported being active to a healthy level and beyond (151+ times annually) in high-calorie burning activities, considered as 'super active'. One out of ten (10.3%) claim to be 'active' (50-150 times) and; similarly, 10.4% were active to a 'casual' level (1-50 times) in high-calorie burning activities. The rest either engaged in low/med-calorie burning activities (20.1%) or reported no activity (27.5%).

ACTIVITY BY GENERATION

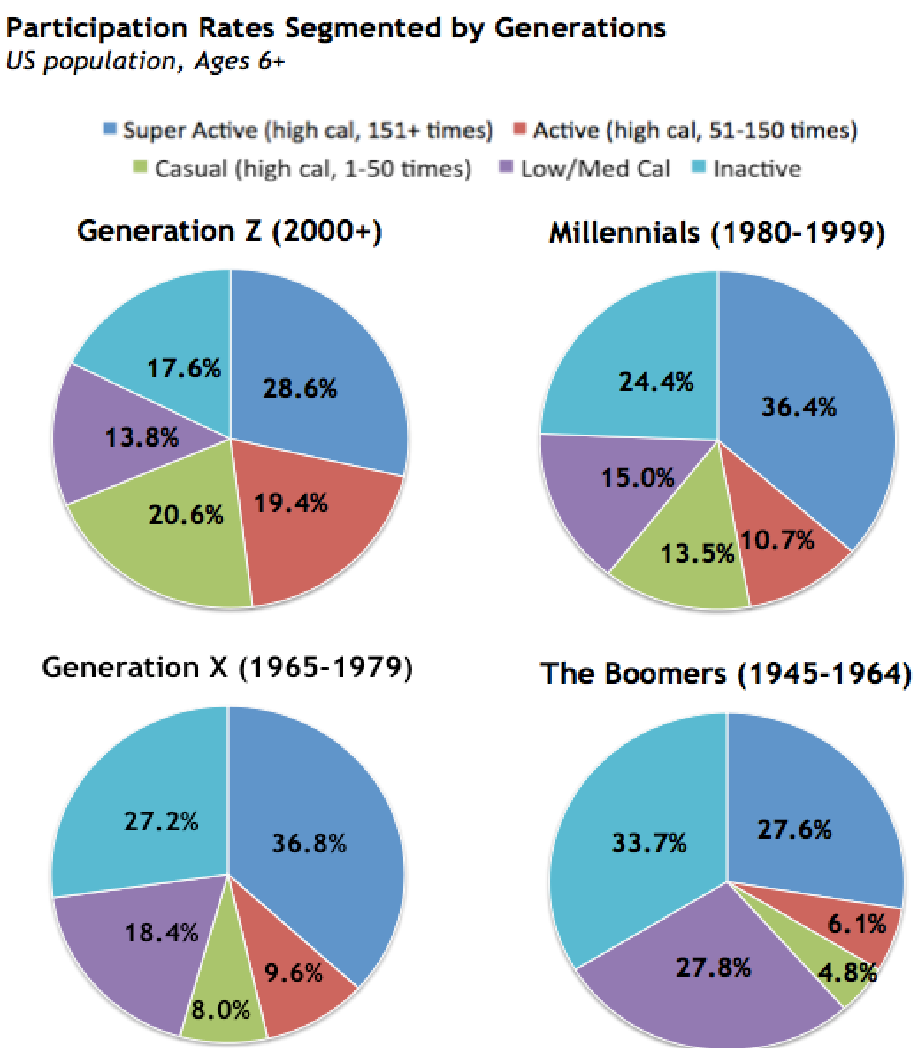
Analyzing participation by age for recreational activities reveals that fitness and outdoor sports were the most common activities across all generations. Breaking down activity level by generation shows a converse correlation between age and healthy activity rates.

Generation Z (born 2000+) were the most active, with only 17.6% as inactive, but most people in this age range were moderate participants; about 35% only engaged casually in high calorie burning activities or in low /med calorie burning activities and around 20% participated actively in high calorie burning activities.

A total of 36.4% of **millennials (born 1980-1999)** were active to a healthy level, while 24.4% claimed they were inactive. Although the inactivity rate was below the national level (27.5%), it increased over last year.

Generation X (born 1965-1979) has the highest super active rate (36.8%) among all age groups, but they also have the second highest inactive rate, 27.2% of this age group remained inactive.

The Boomers (born 1945-1964) were the least active generation, with an inactive rate of 33.7%. This age group tends to participate in less intensive activities. 27.8% liked to engage in low/med calorie burning activities, while 27.6% are active to a healthy level.



1.2.3 NATIONAL TRENDS IN GENERAL SPORTS

The sports most heavily participated in for 2016 were golf (24.1 million in 2015) and basketball (22.3 million), which have participation figures well in excess of the other activities in the general sports category. The popularity of golf and basketball can be attributed to the ability to compete with relatively small number of participants. Golf also benefits from its wide age segment appeal, and is considered a life-long sport. Basketball's success can be attributed to the limited amount of equipment needed to participate and the limited space requirements necessary, which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game.

Since 2011, rugby and other niche sports, like boxing, roller hockey, and squash, have seen strong growth. Rugby has emerged as the overall fastest growing sport, as it has seen participation levels rise by 82.4% over the last five years. Based on the five-year trend, boxing (62%), roller hockey (55.9%), squash (39.3%), lacrosse (39.2%), cheerleading (32.1%) and field hockey (31.8%) have also experienced significant growth. In the most recent year, the fastest growing sports were gymnastics (15%), rugby (14.9%), sand volleyball (14.7%), Pickleball (12.3%), and cheerleading (11.7%).

During the last five years, the sports that are most rapidly declining include touch football (-26%), ultimate Frisbee (-24.5%), racquetball (-17.9%), and tackle football (-15%). Ultimate Frisbee and racquetball are losing their core participants while touch football and tackle football are experiencing attrition of its casual participant base. For the most recent year, ultimate Frisbee (-16.7%), touch football (-12.3%), tackle football (-11.9%), and boxing have undergone the largest decline.

In general, the most recent year shares a similar pattern with the five-year trends; suggesting that the increasing rates for participation in certain activities have not yet reached their peaks in sports like rugby, sand volleyball, and ice hockey. However, four sports that increased rapidly over the past five years have undergone decline in 2016, including lacrosse, field hockey, squash, and boxing for competition. The reversal of the five-year trends in these sports may be due to a relatively low user base (about 1 million) and could suggest that participation in these activities may have peaked. Exiting individuals from these declining activities are mostly causal participants that may switch to a variety of other sports or fitness activities.

The most popular sports such as basketball and baseball have a larger core participant base (engaged in this activity more than 13 times annually) than casual participant base (engaged at least 1 time annually). Less mainstream sports such as ultimate Frisbee, roller hockey, squash and boxing for competition have more casual participants who engaged in these sports in a low frequency. Although, for the five-year trends, these sports have increasing in participation, people joining were mostly casual participants who engaged less frequently than the more dedicated, core participant base and may switch to other sports or fitness activities, explaining the declining one-year trends.

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2011	2015	2016	11-16	15-16
Golf (2015 data*)	26,122	24,700	24,120	-7.7%	-2.3%
Basketball	24,790	23,410	22,343	-9.9%	-4.6%
Tennis	17,772	17,963	18,079	1.7%	0.6%
Baseball	13,561	13,711	14,760	8.8%	7.7%
Soccer (Outdoor)	13,667	12,646	11,932	-12.7%	-5.6%
Softball (Slow Pitch)	7,809	7,114	7,690	-1.5%	8.1%
Badminton	7,135	7,198	7,354	3.1%	2.2%
Volleyball (Court)	6,662	6,423	6,216	-6.7%	-3.2%
Football, Flag	6,325	5,829	6,173	-2.4%	5.9%
Football, Touch	7,684	6,487	5,686	-26.0%	-12.3%
Volleyball (Sand/Beach)	4,451	4,785	5,489	23.3%	14.7%
Football, Tackle	6,448	6,222	5,481	-15.0%	-11.9%
Gymnastics	4,824	4,679	5,381	11.5%	15.0%
Soccer (Indoor)	4,631	4,813	5,117	10.5%	6.3%
Track and Field	4,341	4,222	4,116	-5.2%	-2.5%
Cheerleading	3,049	3,608	4,029	32.1%	11.7%
Ultimate Frisbee	4,868	4,409	3,673	-24.5%	-16.7%
Racquetball	4,357	3,883	3,579	-17.9%	-7.8%
Pickleball	N/A	2,506	2,815	N/A	12.3%
Ice Hockey	2,131	2,546	2,697	26.6%	5.9%
Softball (Fast Pitch)	2,400	2,460	2,467	2.8%	0.3%
Lacrosse	1,501	2,094	2,090	39.2%	-0.2%
Roller Hockey	1,237	1,907	1,929	55.9%	1.2%
Wrestling	1,971	1,978	1,922	-2.5%	-2.8%
Rugby	850	1,349	1,550	82.4%	14.9%
Squash	1,112	1,710	1,549	39.3%	-9.4%
Field Hockey	1,147	1,565	1,512	31.8%	-3.4%
Boxing for Competition	747	1,355	1,210	62.0%	-10.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
*Golf participation is based on 2015 data, as current figures were unavailable at the time of study.					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.4 NATIONAL TRENDS IN AQUATIC ACTIVITY

Swimming is unquestionably a lifetime sport, and all aquatic activities have experienced strong participation growth among the American population. In 2016, fitness swimming is the absolute leader in overall participation (26.6 million) for aquatic activities, due in large part to its broad, multigenerational appeal. In the most recent year, competition swimming reported the strongest growth (16.5%) among aquatic activities, followed by aquatic exercise (14.6%) and fitness swimming (1.1%).

Aquatic exercise also has a strong participation base, and has experienced steady growth since 2011. Aquatic exercise has paved the way as a less stressful form of physical activity, while allowing similar benefits as land-based exercises, including aerobic fitness, resistance training, flexibility, and better balance. Doctors are now recommending aquatic exercise for injury rehabilitation, mature patients, and patients with bone or joint problems, due to the significant reduction of stress placed on weight-bearing joints, bones, muscles, and also the effect of the water in reducing swelling from injuries.

While all activities have undergone increases over the last five years and most recently, casual participation (1-49 times) is increasing much more rapidly than core participation (50+ times). For the five-year timeframe, casual participants of competition swimming increased by 123.9%, aquatic exercise by 27.5% and fitness swimming by 26.4%. However, core participants of fitness swimming decreased by 4.8% in 2016. From 2011 to 2016, core participation of competition swimming declined by 2.3% and aquatic exercise declined by 0.1%.

National Participatory Trends - Aquatics					
Activity	**Participation Levels**			**% Change**	
	2011	**2015**	**2016**	**11-16**	**15-16**
Swimming (Fitness)	21,517	26,319	26,601	23.6%	1.1%
Aquatic Exercise	9,042	9,226	10,575	17.0%	14.6%
Swimming (Competition)	2,363	2,892	3,369	42.6%	16.5%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.5 NATIONAL TRENDS IN GENERAL FITNESS

Overall, national participatory trends in fitness have experienced strong growth in recent years. Many of these activities have become popular due to an increased interest among people to improve their health by engaging in an active lifestyle – 0.4% more people were reported being active to a healthy level and inactivity rate decreased by 0.2% in 2016. These activities also have very few barriers to entry, which provides a variety of options that are relatively inexpensive to participate in and can be performed by nearly anyone with no time restrictions.

The most popular fitness activity by far is fitness walking, which had about 107.9 million participants in 2016, despite a 1.8% decrease from the previous year. Other leading fitness activities based on total number of participants include treadmill (52 million), hand weights (51.5 million), running/jogging (47.4 million), stationary cycling (36.1 million), and weight/resistance machines (35.8 million).

Over the last five years, the activities growing most rapidly are non-traditional / off-road triathlons (108.2%), trail running (59.7%), traditional road triathlons (40.8%), high impact aerobics (35.8%), and tai chi (24.6%). For the same time frame, the activities that have undergone the most decline include boot camp style cross training (-14.6%), weight/resistant machines (-9.6%), running/jogging (-5.3%), and fitness walking (-4.3%).

In the last year, activities with the largest gains in participation included stair climbing machine (13.9%), bodyweight exercise (13.4%), and cross training style workout (10.3%). From 2015 to 2016, the activities that had the most decline in participation were Barre (-7.1%), hand weights (-5.9%), stretching (-5.6%), and boxing for fitness (-4.5%).

It should be noted that many of the activities growing most rapidly have a relatively low user base, which allows for more drastic shifts in terms of percentage, especially for five-year trends. Increasing casual participants may also explain the rapid growth in some activities. For instance, core/casual participation trends showed that over the last five years, casual participants increased drastically in high impact aerobics (62%) and tai chi (36.8%), while core participant base of both activities experienced more steady growth.

Recent declines in extremely popular activities, such as fitness walking and running / jogging, paired with widespread growth in activities with lower participation levels, may suggest that those engaging in fitness activities are actively looking for new forms of exercise. However, popular activities like traditional and non-traditional triathlons had larger core than casual participant base.

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2011	2015	2016	11-16	15-16
Fitness Walking	112,715	109,829	107,895	-4.3%	-1.8%
Treadmill	53,260	50,398	51,972	-2.4%	3.1%
Free Weights (Dumbbells/Hand Weights)	N/A	54,716	51,513	N/A	-5.9%
Running/Jogging	50,061	48,496	47,384	-5.3%	-2.3%
Stationary Cycling (Recumbent/Upright)	36,341	35,553	36,118	-0.6%	1.6%
Weight/Resistant Machines	39,548	35,310	35,768	-9.6%	1.3%
Stretching	34,687	35,776	33,771	-2.6%	-5.6%
Elliptical Motion Trainer	29,734	32,321	32,218	8.4%	-0.3%
Free Weights (Barbells)	27,056	25,381	26,473	-2.2%	4.3%
Yoga	22,107	25,289	26,268	18.8%	3.9%
Calisthenics/Bodyweight Exercise	N/A	22,146	25,110	N/A	13.4%
Choreographed Exercise	N/A	21,487	21,839	N/A	1.6%
Aerobics (High Impact)	15,755	20,464	21,390	35.8%	4.5%
Stair Climbing Machine	13,409	13,234	15,079	12.5%	13.9%
Cross-Training Style Workout	N/A	11,710	12,914	N/A	10.3%
Stationary Cycling (Group)	8,738	8,677	8,937	2.3%	3.0%
Pilates Training	8,507	8,594	8,893	4.5%	3.5%
Trail Running	5,373	8,139	8,582	59.7%	5.4%
Cardio Kickboxing	6,488	6,708	6,899	6.3%	2.8%
Boot Camp Style Cross-Training	7,706	6,722	6,583	-14.6%	-2.1%
Martial Arts	5,037	5,507	5,745	14.1%	4.3%
Boxing for Fitness	4,631	5,419	5,175	11.7%	-4.5%
Tai Chi	2,975	3,651	3,706	24.6%	1.5%
Barre	N/A	3,583	3,329	N/A	-7.1%
Triathlon (Traditional/Road)	1,686	2,498	2,374	40.8%	-5.0%
Triathlon (Non-Traditional/Off Road)	819	1,744	1,705	108.2%	-2.2%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.6 NATIONAL TRENDS IN OUTDOOR RECREATION

Results from the Participation Report demonstrate a dichotomy of growth and attrition among outdoor / adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or within a group, and are not limited by time restraints.

In 2016, the most popular activities, in terms of total participants, from the outdoor / adventure recreation category include day hiking (42.1 million), road bicycling (38.4 million), freshwater fishing (38.1 million), and camping within ¼ mile of vehicle/home (26.5 million).

From 2011-2016, adventure racing (149.5%), BMX bicycling (58.5%), traditional climbing (46.5%), and backpacking overnight (31.5%) have undergone the largest increases. More recently, activities growing most rapidly in the last year were BMX bicycling (15.4%), day hiking (13.1%), traditional climbing (8.5%), and recreational vehicle camping (7.9%).

The five-year trend shows activities declining most rapidly were in-line roller skating (-27.8%), camping within ¼ mile of home/vehicle (-17.2%), and bird watching (-11.3%). The recent year trend experiences a relatively smaller decline but includes similar activities as the five-year trend. The activities experiencing declines were bird watching (-11.5%), in-line roller skating (-10.7%), fly fishing (-5.7%), and camping within ¼ mile of home/vehicle (-4.6%).

Regarding the national trend of outdoor activities participation on the rise, all casual participation except for in-line roller skating had increased over the last five years. The decline in participation over the last five years was mainly ascribed to decreases in core participants for activities such as skateboarding (-14.2%), RV camping (-11.2%), freshwater fishing (-8.7%), road bicycling (-7.7%) and fly fishing (-7.5%). Most recently, both core and casual participation were on the decline for archery and in-line roller skating.

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	**Participation Levels**			**% Change**	
	2011	**2015**	**2016**	**11-16**	**15-16**
Hiking (Day)	33,494	37,232	42,128	25.8%	13.1%
Bicycling (Road)	39,834	38,280	38,365	-3.7%	0.2%
Fishing (Freshwater)	38,864	37,682	38,121	-1.9%	1.2%
Camping (< 1/4 Mile of Vehicle/Home)	31,961	27,742	26,467	-17.2%	-4.6%
Wildlife Viewing (>1/4 Mile of Home/Vehicle)	21,495	20,718	20,746	-3.5%	0.1%
Camping (Recreational Vehicle)	16,282	14,699	15,855	-2.6%	7.9%
Fishing (Saltwater)	11,896	11,975	12,266	3.1%	2.4%
Birdwatching (>1/4 mile of Vehicle/Home)	13,067	13,093	11,589	-11.3%	-11.5%
Backpacking Overnight	7,722	10,100	10,151	31.5%	0.5%
Bicycling (Mountain)	6,989	8,316	8,615	23.3%	3.6%
Archery	6,471	8,378	7,903	22.1%	-5.7%
Fishing (Fly)	5,581	6,089	6,456	15.7%	6.0%
Skateboarding	6,318	6,436	6,442	2.0%	0.1%
Roller Skating, In-Line	7,451	6,024	5,381	-27.8%	-10.7%
Climbing (Sport/Indoor/Boulder)	4,445	4,684	4,905	10.3%	4.7%
Bicycling (BMX)	1,958	2,690	3,104	58.5%	15.4%
Adventure Racing	1,202	2,864	2,999	149.5%	4.7%
Climbing (Traditional/Ice/Mountaineering)	1,904	2,571	2,790	46.5%	8.5%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.7 NATIONAL TRENDS IN HUNTING / FISHING ACTIVITIES

Overall, activities related to hunting and fishing have seen strong participation growth in recent years. In 2016, the most popular of these activities in terms of total participants were freshwater fishing (38.1 million), target shooting with a handgun (16.2 million), and target shooting with a rifle (14 million).

Examining growth trends over the last five years, activities with the highest rate of growth were trap / skeet shooting (33.2%), hunting with handgun (30.6%), and shooting with sports clays (27.4%). Activities experiencing the most rapid growth over the most recent year are fly fishing (6%), trap / skeet shooting (5.3%), and hunting with a handgun (3.3%).

Since 2011, only two activities underwent a decrease in participation – hunting with shotgun (-1.9%) and freshwater fishing (-1.2%). Most recently, only three activities experienced declines, including archery (-5.7%), bow hunting (-3.0%), and shotgun hunting (-2.0%).

National Participatory Trends - Hunting / Fishing Activities					
Activity	Participation Levels			% Change	
	2011	2015	2016	11-16	15-16
Fishing (Freshwater)	38,864	37,682	38,121	-1.9%	1.2%
Target Shooting (Handgun)	13,638	15,744	16,199	18.8%	2.9%
Target Shooting (Rifle)	13,032	13,720	14,039	7.7%	2.3%
Fishing (Saltwater)	11,896	11,975	12,266	3.1%	2.4%
Hunting (Rifle)	10,479	10,778	10,797	3.0%	0.2%
Hunting (Shotgun)	8,370	8,438	8,271	-1.2%	-2.0%
Archery	6,471	8,378	7,903	22.1%	-5.7%
Fishing (Fly)	5,581	6,089	6,456	15.7%	6.0%
Shooting (Sport Clays)	4,296	5,362	5,471	27.4%	2.0%
Shooting (Trap/Skeet)	3,453	4,368	4,600	33.2%	5.3%
Hunting (Bow)	4,271	4,564	4,427	3.7%	-3.0%
Hunting (Handgun)	2,690	3,400	3,512	30.6%	3.3%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.8 NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

The most popular water sports / activities based on total participants in 2016 were canoeing (10 million), recreational kayaking (10 million), and snorkeling (8.7 million). It should be noted that water activity participation tends to vary based on regional, seasonal and environmental factors. A region with more water access and a warmer climate could potentially have a higher participation rate in water activities than a region that has long winter seasons or experiences drought. Therefore, when assessing trends in water sports and activities, it is important to understand that fluctuations may be the result of weather patterns and that regional accessibility can greatly improve, or diminish, participation in water activities.

Over the last five years, stand-up paddling (up 181%) was by far the fastest growing water activity, followed by white water kayaking (50.6%), sea / touring kayaking (49.7%), recreational kayaking (36.3%), and boardsailing / windsurfing (25.5%). Although the five-year trends show water sports / activities are getting more popular, the most recent year reflects a much slower increase in general -- stand-up paddling by 6.6%, recreational kayaking by 5.5%, and surfing by 4.4%.

From 2011-2016, activities declining most rapidly were jet skiing (-23.6%), water skiing (-20%), and rafting (-17.2%). In the most recent year, activities experiencing the greatest declines in participation included rafting (-11.7%), wakeboarding (-9.7%), jet skiing (-7.7%), and water skiing (-6.3%).

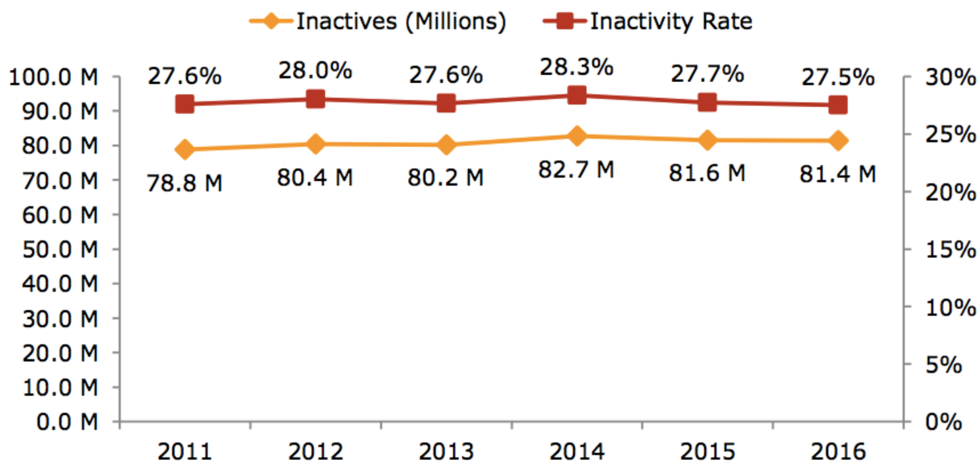
As mentioned previously, regional, seasonal and environmental limiting factors may influence the participation rate of water sport and activities. These factors may also explain why in almost all water-based activities there are more casual participants than core participants, since frequencies of activities may be heavily constrained by external factors.

National Participatory Trends - Water Sports / Activities

Activity	Participation Levels			% Change	
	2011	2015	2016	11-16	15-16
Canoeing	10,170	10,236	10,046	-1.2%	-1.9%
Kayaking (Recreational)	7,347	9,499	10,017	36.3%	5.5%
Snorkeling	9,312	8,874	8,717	-6.4%	-1.8%
Jet Skiing	7,574	6,263	5,783	-23.6%	-7.7%
Sailing	3,797	4,099	4,095	7.8%	-0.1%
Water Skiing	4,626	3,948	3,700	-20.0%	-6.3%
Rafting	4,141	3,883	3,428	-17.2%	-11.7%
Stand-Up Paddling	1,146	3,020	3,220	181.0%	6.6%
Kayaking (Sea/Touring)	2,087	3,079	3,124	49.7%	1.5%
Scuba Diving	2,866	3,274	3,111	8.5%	-5.0%
Wakeboarding	3,517	3,226	2,912	-17.2%	-9.7%
Surfing	2,481	2,701	2,793	12.6%	3.4%
Kayaking (White Water)	1,694	2,518	2,552	50.6%	1.4%
Boardsailing/Windsurfing	1,384	1,766	1,737	25.5%	-1.6%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.2.9 NATIONAL TRENDS IN INACTIVITY

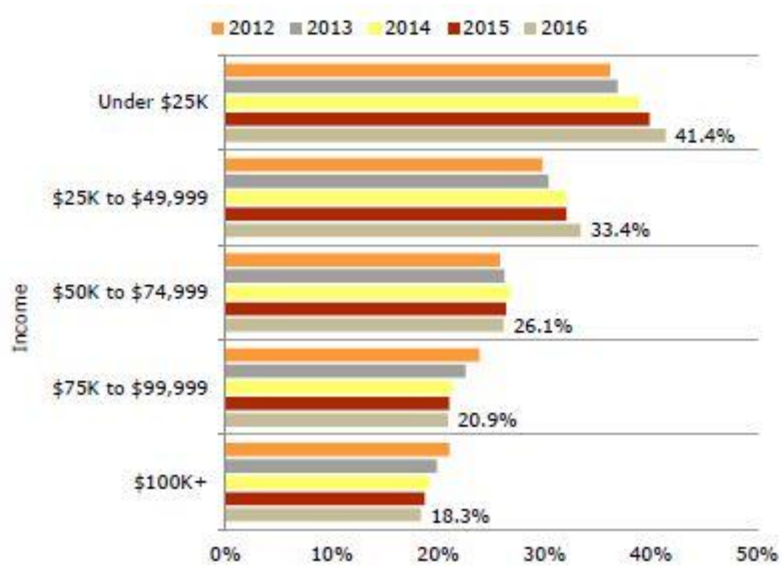
In 2016, 27.5% of Americans were inactive. The inactivity rate has decreased by 0.2% and more than 2 million people exited the category of 'inactives'. However, there were more than 81.4 million Americans reported no physical activities in 2016. Over the five-year timeframe, although the inactivity rate has experienced a 0.1% decrease, 2.6 million more people have become inactive.



***Source: Sports, Fitness, and Leisure Activities Topline Participation Report 2017, SFIA**

INACTIVITY AND INCOME

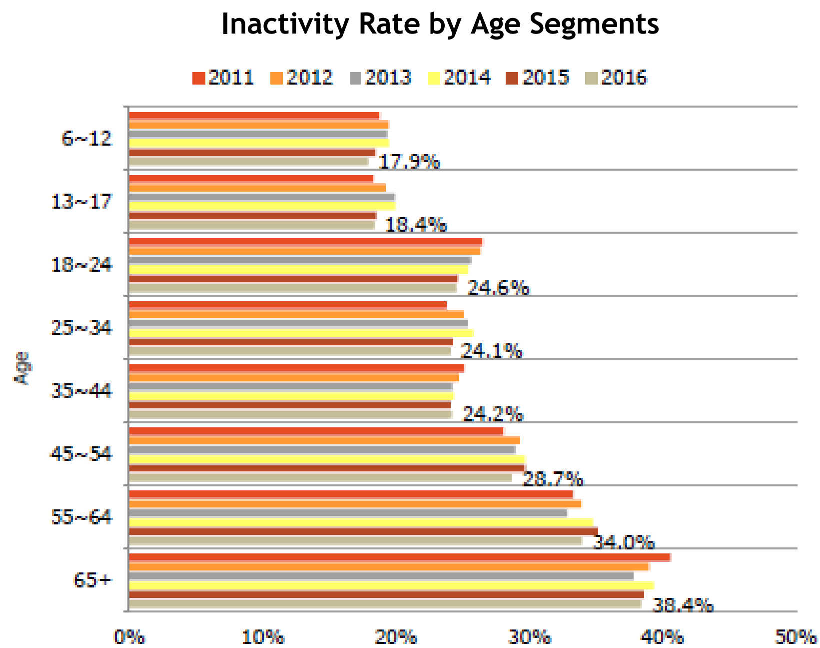
A negative correlation between inactivity and income level was evident in the last five years. Lower income households tend to have higher inactivity rate. Households with annual income under $25K have an inactivity rate of 41.4% in 2016, which is significantly higher than any other income group. Since 2012, a contrasting trend for inactivity has emerged in households earning above and below $50,000 annually. In these instances, more initiatives that offer discounted sports and recreation programs and increased accessibility to recreational opportunities in low income areas will be needed to lower the inactivity rate.



***Source: Sports, Fitness, and Leisure Activities Topline Participation Report 2017, SFIA**

INACTIVITY BY AGE SEGMENT

In general, inactivity rates increase as participants age. Generation Z (age 6-17) remained the most active and the boomers (age 55+) had the highest inactive rate. Most recently, no age segment has experienced an increase in inactivity. In the last year, the youngest participants (age 6-12), the second half of Gen X (age 45-54), and the youngest Boomers (age 55-64) underwent the sharpest decline in inactivity; while all other age segments remained relatively flat. Over the five-year period, the first half of millennials (age 18-24) and second half of Boomers (age 65+) experienced substantial decreases in the inactive rate, countered by increases in inactivity for the 25-34, 45-54, and 55-64 age segments.



***Source: Sports, Fitness, and Leisure Activities Topline Participation Report 2017, SFIA**

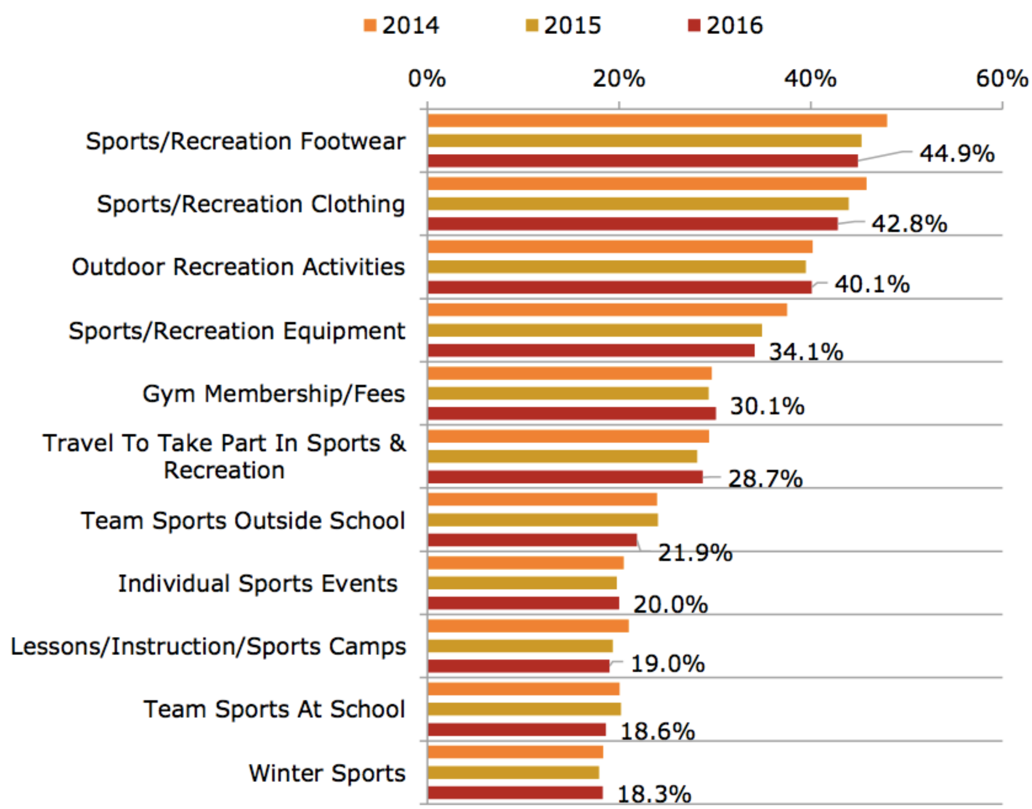
NON-PARTICIPANT ASPIRATIONAL INTEREST

Among the population who are inactive, aspirational participation trends reveal what might prevent 'inactives' from joining sports or fitness activities. The trends suggested that one major barrier to higher rates of activity is a lack of companionship in fitness activities. Among those surveyed, 43% of non-participants said that fitness or sports activity would be more enjoyable if there were someone to take part with, and 31.3% of non-participants would engage in physical activities if accompanied by a friend.

1.2.10 NATIONAL TRENDS IN FITNESS AND SPORTS SPENDING

Overall, fitness and sports related spending decreased slightly over the past three years. As outdoor recreation activities become more popular, spending in the category increased in the most recent year. Gym membership/fee and travel expenses for recreation have also undergone increases in fitness spending over the past year. Noticeably, spending on team sports, both at and outside school, has seen relatively large declines in 2016.

Ownership of health and fitness tracking devices has also increased in recent years. More than a quarter of all active participants owned a fitness tracking device in 2016, which includes fitness trackers that sync with computer/tablet/smartphone, pedometer, and heart rate monitor. Wearable fitness tracking is becoming the most popular tracking option for both active and inactive participants.



***Source: Sports, Fitness, and Leisure Activities Topline Participation Report 2017, SFIA**

1.2.11 LOCAL SPORT AND MARKET POTENTIAL

The following charts show sport and leisure market potential data from ESRI. A Market Potential Data (MPI) measures the probable demand for a product or service within the City of Upper Arlington. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the US National average. The national average is 100, therefore numbers below 100 would represent a lower than average participation rate, and numbers above 100 would represent higher than average participation rate. The service area is compared to the national average in four (4) categories – general sports, fitness, outdoor activity, and commercial recreation.

Overall, the City of Upper Arlington demonstrates above average market potential index (MPI) numbers; this is particularly noticeable in the fitness and commercial recreation market potential tables. Every activity in the fitness category and most (except two) activities in the commercial recreation category have an above average MPI score (100+). Looking at the other two categories (general sports and outdoor activities), even though they all have a few activities with MPI below national averages, a majority of the activities have scores well above 100. These overall high MPI scores show that Upper Arlington's residents have a rather strong participation presents when it comes to recreational activities. This becomes significant for when the City considers starting up new programs or building new amenities; giving them a strong tool to estimate resident participation.

As seen in the tables below, the following sport and leisure trends are most prevalent for residents within the City. The activities are listed in descending order, from highest to lowest number of estimated participants amongst the population.

High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents of the service area will actively participate in offerings provided by Upper Arlington Recreation and Leisure Services.

GENERAL SPORTS MARKET POTENTIAL

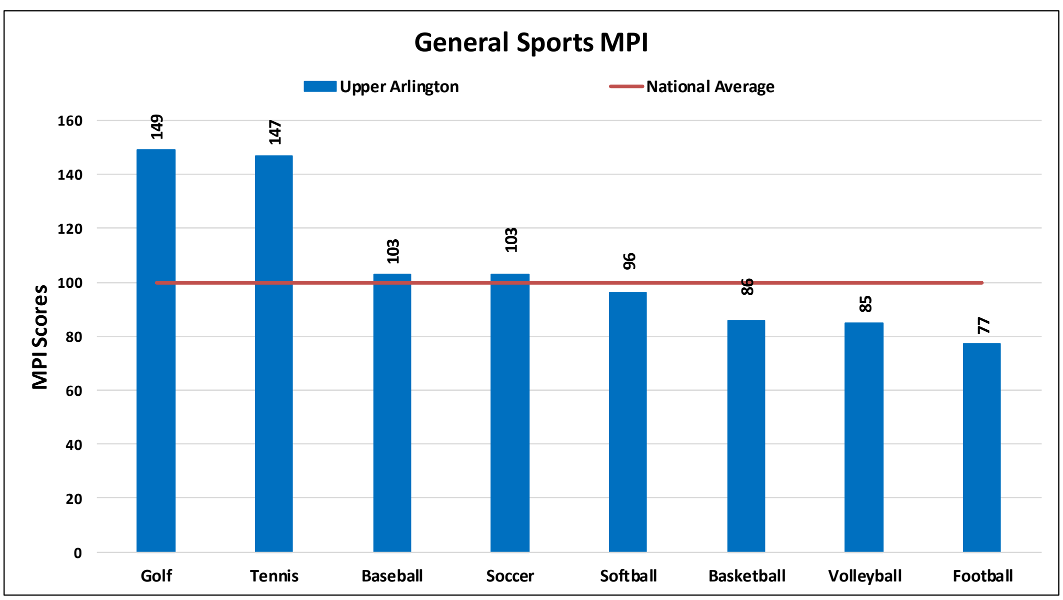


Figure 13: City of Upper Arlington General Sports Participation MPI

FITNESS MARKET POTENTIAL

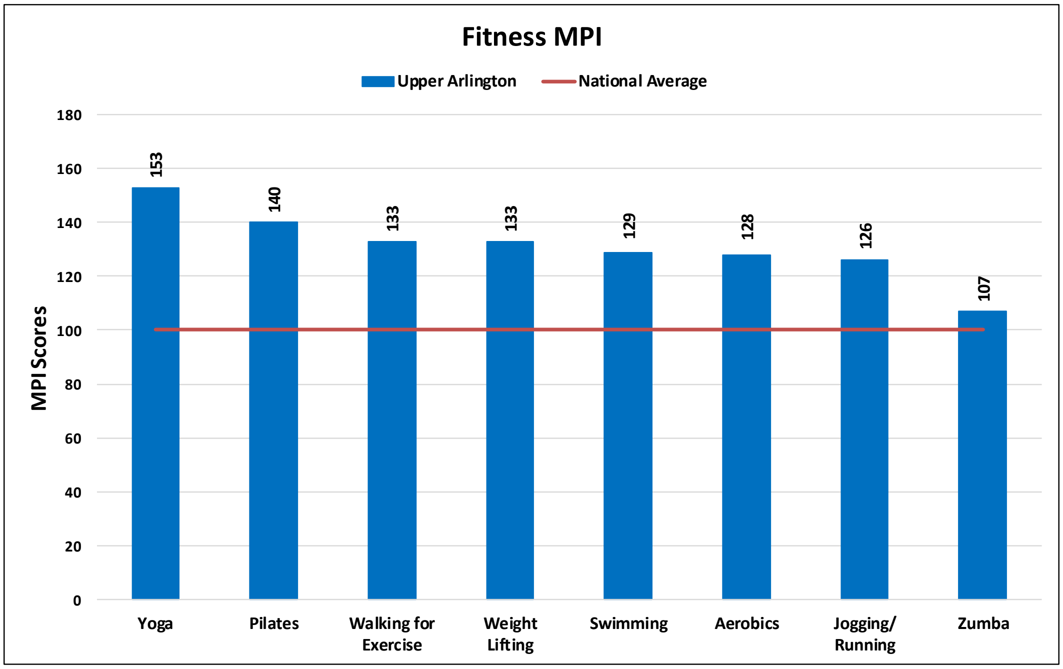


Figure 14: City of Upper Arlington Fitness Participation MPI

OUTDOOR ACTIVITY MARKET POTENTIAL

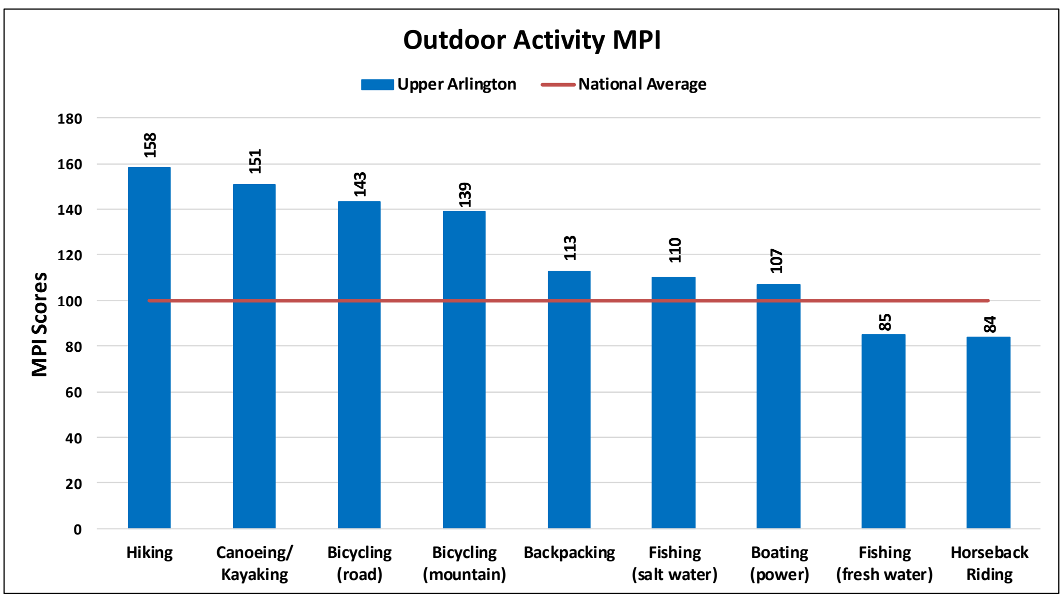


Figure 15: City of Upper Arlington Outdoor Participation MPI

COMMERCIAL RECREATION MARKET POTENTIAL

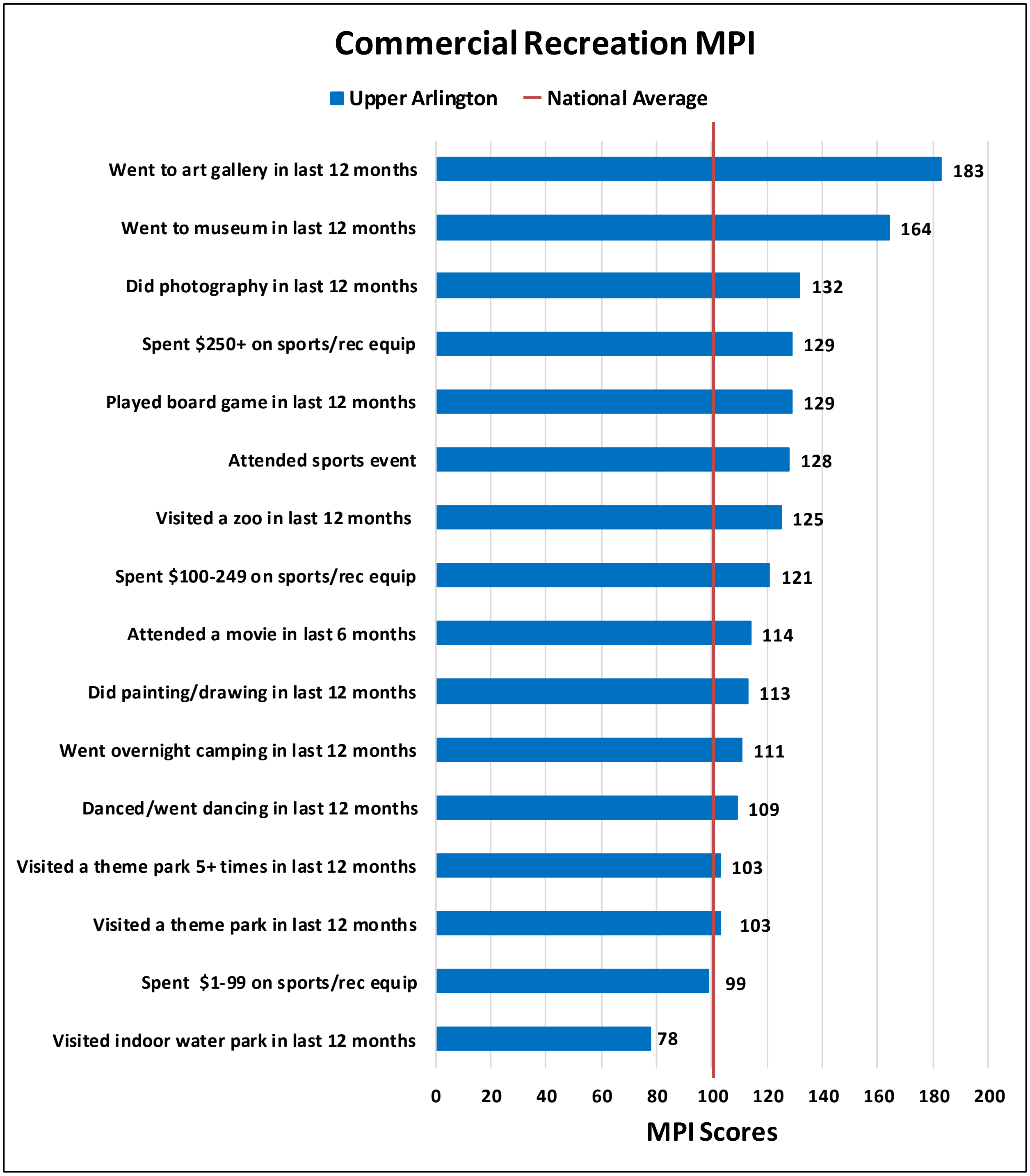


Figure 16: City of Upper Arlington Commercial Recreation Participation MPI

1.2.12 LOCAL SPORT AND SPENDING POTENTIAL

Spending potential data attributed to recreational activity is provided by ESRI for the City of Upper Arlington and the U.S., which factors the latest Consumer Expenditure Surveys (2014-2015) from the Bureau of Labor Statistics to estimate the current spending patterns. Data includes total expenditures, average spending per household, and a Spending Potential Index (SPI) for recreational products and services.

The same index calculation is applied to SPI and MPI, where 100 represents the national average; such that an SPI of 200 would mean twice as much is spent on an activity or product, while an SPI of 50 would signify half as much being spent. Comparatively, SPI is similar to the index for market potential (MPI), except that SPI assesses dollars spent on recreation versus a propensity to participate in activities (i.e. MPI). The spending area is compared to the national average in two categories – entertainment/recreation fees and admissions, and recreation equipment.

In all recreational related expenditures, the City of Upper Arlington demonstrates above average SPI numbers. $18,305,409 was spent on entertainment/ recreation fees and admission. In this category, average household in the City of Upper Arlington spent the most on membership fees for social/recreation/civic clubs ($426.4) and fees for recreational lessons ($273.07), both of which were twice the average amount spent by the U.S. household.

Total expenditures on recreation equipment were $4,494,824. On average, Upper Arlington household spent the most on exercise equipment and gear, game tables ($105.23), hunting and fishing equipment ($75.31), and bicycles ($53.17), all of which were more than 75% higher than the national level.

Overall, SPI are particularly high on winter sports equipment (217), fees for recreational lessons (205), membership fees for recreation clubs (203), and water sport equipment (203). High SPI numbers indicate that Upper Arlington residents are willing to spend extra income on recreation admission/fees and equipment.

Since household income characteristics in Upper Arlington are approximately double both state and national levels, residents are likely to have disposable income. The SPI data suggests that residents are willing to spend on recreation related products and services and are likely to demand best-in-class facilities and programs.

Local Participatory Trends - Recreation Expenditures				
Activity	Total $$ in Upper Arlington Households	Average $$ spent/Household		SPI
		Upper Arlington	USA	
Entertainment/Recreation Fees and Admissions	**$18,305,409**	**$1,260.88**	**$636.81**	**198**
Tickets to Movies/Museum/Parks	$2,035,522	$140.21	$77.04	**182**
Admission to Sporting Events, excl. Trips	$1,552,861	$106.96	$55.71	**192**
Fees for Participant Sports, excl. Trips	$2,791,550	$192.28	$99.11	**194**
Fees for Recreational Lessons	$3,964,497	$273.07	$133.20	**205**
Membership Fees for Social/Recreation/Civic Clubs	$6,190,454	$426.40	$210.05	**203**
Sports, Recreation and Exercise Equipment	**$4,494,824**	**$309.60**	**$171.05**	**181**
Exercise Equipment and Gear, Game Tables	$1,527,732	$105.23	$59.45	**177**
Bicycles	$771,933	$53.17	$28.28	**188**
Camping Equipment	$428,578	$29.52	$16.49	**179**
Hunting and Fishing Equipment	$1,093,350	$75.31	$42.55	**177**
Winter Sports Equipment	$188,049	$12.95	$5.97	**217**
Water Sports Equipment	$166,602	$11.48	$5.66	**203**
Other Sports Equipment	$255,385	$17.59	$10.60	**166**
Rental/Repair of Sports/Recreation/Exercise Equipment	$63,194	$4.35	$2.18	**200**

Figure 17: City of Upper Arlington Recreation Expenditures SPI

1.3 AMERICANS' PARKS ENGAGEMENT SURVEY

1.3.1 OVERVIEW

Americans' Parks Engagement Survey 2016 issued by the National Recreation and Park Association (NRPA) reveals how frequently Americans engage with their local park and recreation facilities and what activities they preferred most in their local parks. The survey also illustrates the general public's perception on quality of services provided by their local parks and recreation agency, while also identifying challenges preventing greater usage.

Key findings from the survey:

- Seven in 10 Americans have access to at least one park or recreation facility within walking distance (within a half mile) of their residence.
- On average, Americans visit local parks or recreation facility less than 29 times each year.
- Over half of Americans surveyed visit parks and/or recreation facilities to spend time with family or friends, or to exercise and be more physically active.
- Most Americans prefer to use their park and recreation services to visit local parks, playgrounds, dog parks, and other open spaces. Nearly half of Americans like to use a hiking, biking or walking trail.
- The main barrier preventing Americans to engage with parks and recreation services is lack of time. One in five Americans reported they do not engage because of lack of quality facilities near their home.
- Nearly four in 10 Americans question the safety of accessing parks or recreation facilities.
- Seventy percent (70%) of Americans agree that NRPA Three Pillars – "Conservation", "Health and Wellness", and "Social Equity" should be the priorities of their local parks and recreation agency.

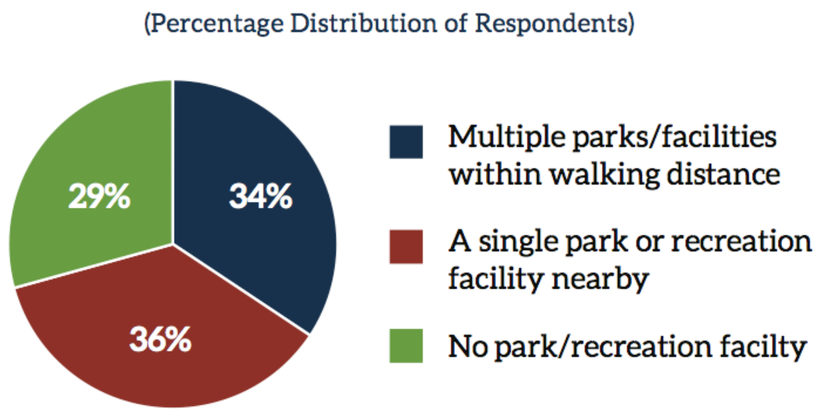
1.3.2 METHODOLOGY

The Americans' Engagement with Parks Survey 2016 is a new annual survey conducted by NRPA. This survey contained 38 questions and engaged Wakefield Research to collect data from a random sample of 1,000 nationally representative U.S. adults ages 18 and above. The data was collected using an email invitation and an online survey. Quotas have been set to ensure reliable and accurate representation. The margin of error of the response is +/- 3.1 percentage points at the 95 percent confidence level.

1.3.3 ACCESSIBILITY TO LOCAL PARKS AND RECREATION FACILITIES

Seven out of ten survey respondents indicate that there is a local park, open space, or recreation center within walking distance from their home. Almost 30 percent of Americans report no walkable (within half mile of residence) access to a park or recreation facility.

Although there is no significant difference in park accessibility based on respondents' race and ethnicity, Millennials and Generation Xers are reporting significantly higher rates of having a park or recreation facility within walkable distance than Baby Boomers.

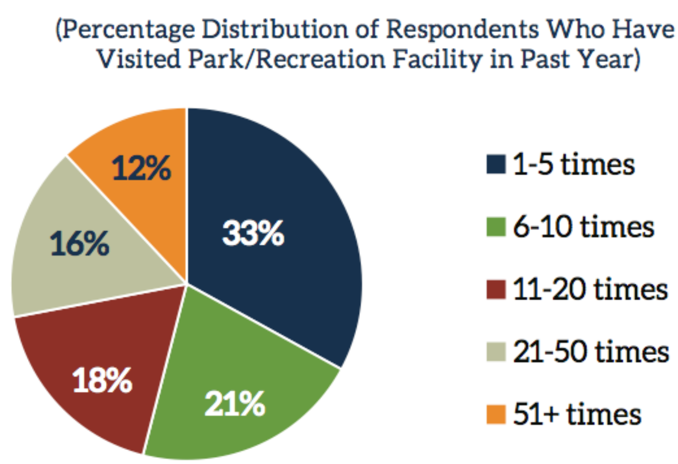


Source: NPRA Americans' Engagement with Parks Survey 2016

1.3.4 FREQUENCY OF VISITS TO LOCAL PARKS AND RECREATION FACILITIES

On average, Americans visit their local parks and recreation facilities less than 29 times each year. For the past 12 months, one third of survey respondents reported they visited a park or recreation facility between one and five times. Twenty-one percent (21%) reported between six and ten annual visits, while 18% visited between 11 and 20 times over the past year. Sixteen percent (16%) visited their parks and/or recreation facility frequently (21-50 times) last year, and 12% were reported to be very frequent (51+ times) visitors over the past 12 months.

Among frequent users, Millennials are the leading generation. Aside from Millennials, those who identify themselves as Hispanic and parents are also frequent visitors. On the other hand, Baby Boomers make less frequent visits to their local parks.



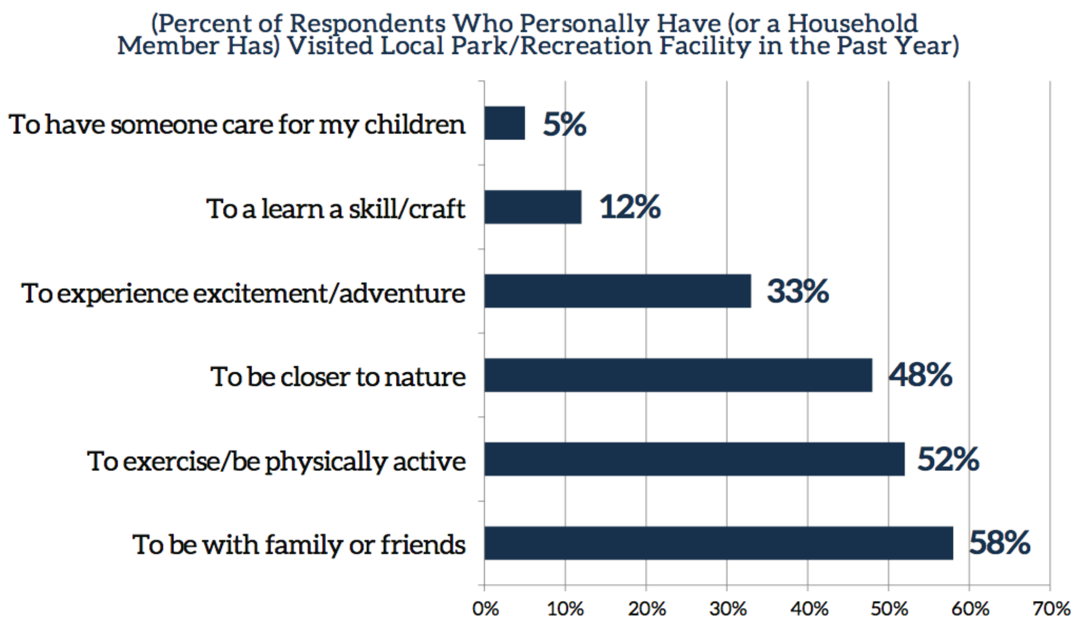
Source: NPRA Americans' Engagement with Parks Survey 2016

1.3.5 KEY REASONS FOR VISITING PARKS AND RECREATION FACILITIES

The number one reason why Americans visit their local parks and recreation facilities is to be with family or friends (58%). A majority from every demographic group surveyed identified spending time with family or friends as the top reason to visit parks. This reason particularly resonates with Millennials (65%) and parents (66%).

Over half of the Americans visited parks over the past 12 months to exercise or to increase their level of physical activity (52%). Forty-eight percent (48%) of respondents chose to visit parks due to their desire to be closer to nature. Baby Boomers (52%) and non-parents (51%) are more likely to pick nature as a major reason to go visit parks.

Thirty-three percent (33%) of respondents visit parks in order to experience excitement or adventure. Millennials and parents are more likely than Baby Boomers and non-parents to cite experiencing excitement and adventure as their reason to visit parks. Other reasons people visit their parks and recreation facilities include: to learn a skill or craft (12%); to have someone care for my children (5%); or to attend an event or activity (1%).



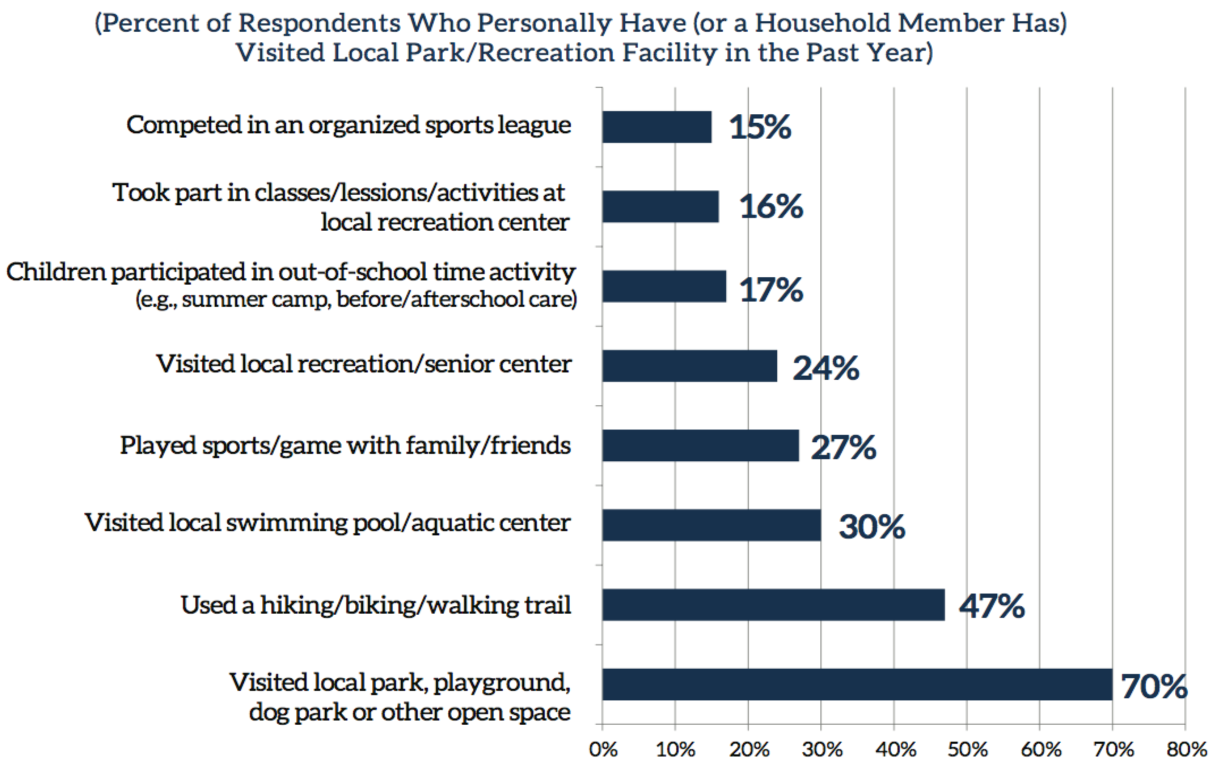
Source: NPRA Americans' Engagement with Parks Survey 2016

1.3.6 AMERICANS' FAVORITE PARK AND RECREATION ACTIVITIES

Seven out of ten (70%) Americans indicted their favorite activities when using park and recreation services is to visit a local park, playground, dog park, or other open space. This number one activity is more favored by Baby Boomers (76%) than Millennials (67%).

Forty-seven percent (47%) of the respondents like to use hiking, biking or walking trails when visiting local parks, while 30 percent prefer to visit a local swimming pool or aquatic center. Twenty-seven percent (27%) of Americans played sports or games with family or friends, among which Millennials (40%) are more likely than Baby Boomers (36%) to participate in this type of activity.

Other favorite activities include: to visit local recreation or senior center (24%); for children to participate in out-of-school time activity (i.e., summer camp, before/after school care) (17%); to take part in classes or lessons at local recreation center (16%); and to compete in an organized sports league (15%).



Source: NPRA Americans' Engagement with Parks Survey 2016

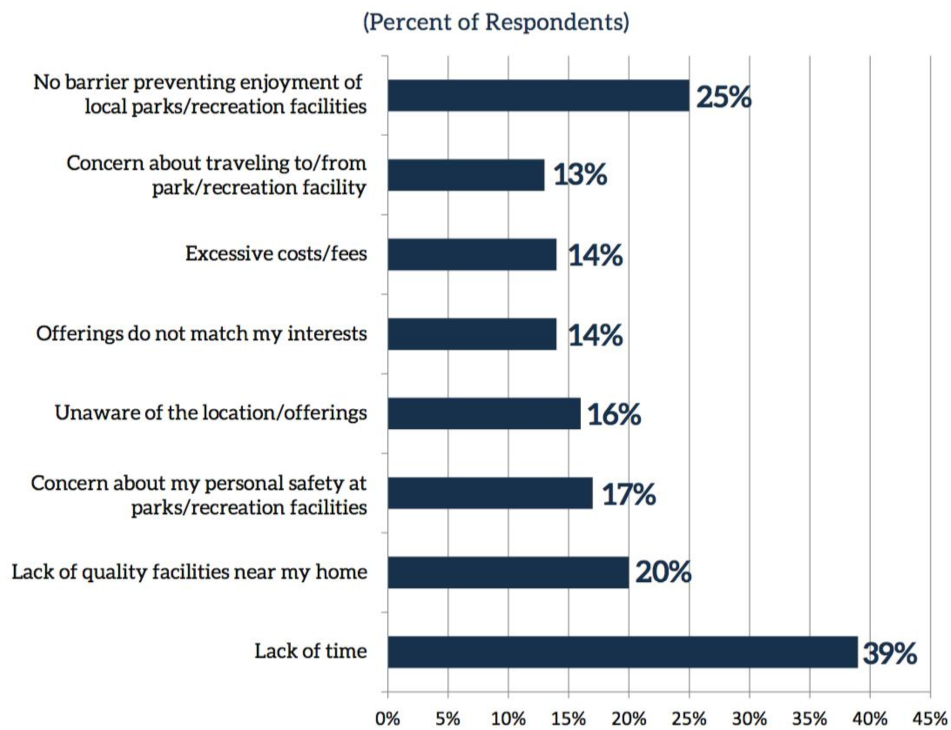
1.3.7 BARRIERS PREVENTING GREATER ENGAGEMENT WITH PARKS AND RECREATION

The survey identified several barriers that keep Americans from greater engagement with local parks and recreation facilities. These barriers represent challenges (and perhaps opportunities) to develop solutions to increase the accessibility of, and participation in, parks and recreational services to the public. Only 25% of survey respondents indicated there are no barriers preventing use of parks and recreation facilities.

The biggest barrier identified by 39% of respondents is a lack of time. This issue is particularly noteworthy for both Millennials and Generation Xers (both at 45%) and for those currently employed (47%).

Twenty percent (20%) noted that the second biggest concern is a lack of quality facilities near home. Seventeen percent (17%) of Americans were concerned about their personal safety at the park or recreation facility.

Other barriers include: unaware of the park location / offerings (16% of total respondents, including 23% of Millennials); offerings of facilities or programs not matching personal interest (14%); and excessive costs / fees (14%).



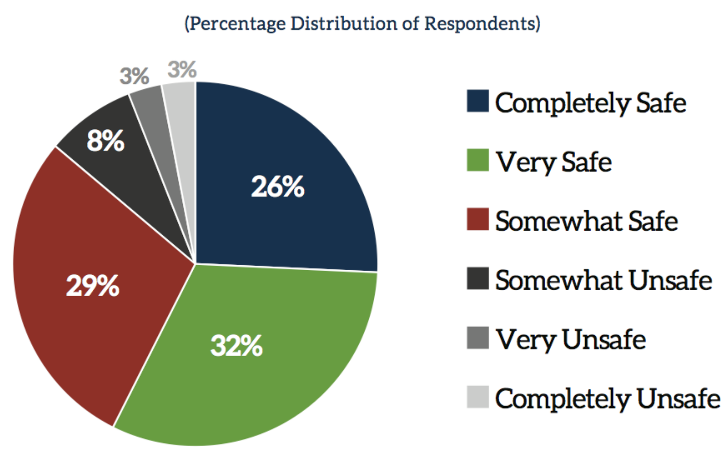
Source: NPRA Americans' Engagement with Parks Survey 2016

1.3.8 PERCEIVED SAFETY WALKING TO LOCAL PARKS AND RECREATION FACILITIES

Nearly six in ten Americans (58%) feel “completely” or “very” safe walking to and from their local park, playground, open space, or recreation center, while 29% perceive walking as “somewhat safe”. However, 14% of Americans feel unsafe, to some degree, walking to and from their local parks and recreation facilities.

People who perceive walking to parks as unsafe are less likely to utilize local park and recreation services. Survey respondents that feel unsafe walking to and from a local park visit at a rate of 40 percent less than those who feel safe walking to and from parks.

In order to increase the perceived safety walking to and from parks and recreation facilities, NRPA has suggested that local parks and recreation agencies should: (1) conduct assessments to identify gaps and barriers in park access; (2) build, improve and maintain public infrastructure like sidewalks, crossings and trails to create safe walking; (3) enhance programming, community engagement and amenities to increase the perception of safety and attract more residents to parks and facilities.



Source: NPRA Americans’ Engagement with Parks Survey 2016

1.4 IMPLICATIONS OF DEMOGRAPHIC AND TRENDS ANALYSIS

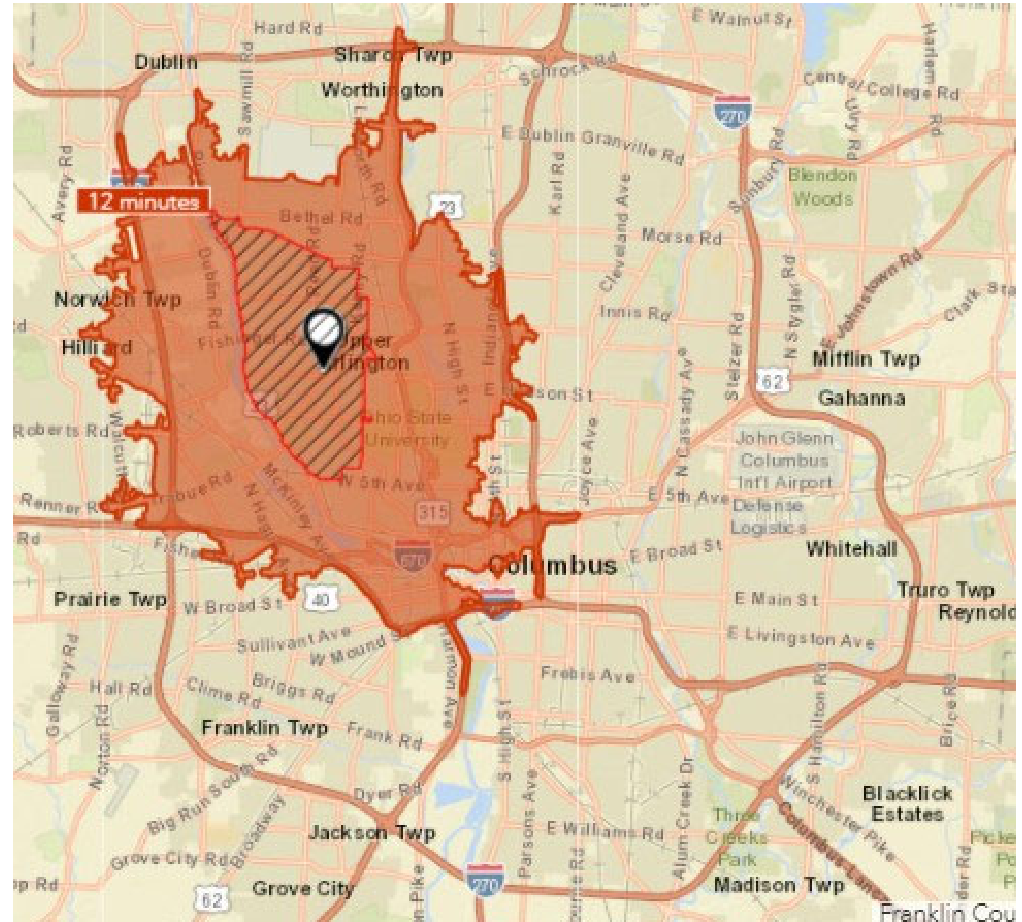
Based on the projected demographic characteristics, national and local trends on participation, and the park engagement survey, the key takeaways pertaining to Upper Arlington include:

- Household income characteristics within the City are very high, suggesting that residents may have increased disposable income and may be more inclined to pay for, and expect, higher quality parks, facilities, and services.
- The City is becoming more diverse and aging more rapidly than national levels; therefore, close attention must be paid to future demographic shifts.
- Market potential (MPI) for fitness and outdoor activities are generally very high among Upper Arlington residents, which is consistent with recent participation rends nationally in these recreational activities.
- Recreational spending potential (SPI) for Upper Arlington residents is also very high, which may indicate that residents in the City are likely to spend money on recreational products and services at a higher rate and demand best-in-class facilities and programs.
- Research from the SFIA shows that approximately 30% of Americans remain inactive. The NRPA also suggests that around 30% of Americans lack walkable access to parks and/or recreation facilities, and 20% claim they lack quality parks and/or facilities near their homes. These statistics emphasize the importance of the Upper Arlington Parks & Recreation Department in providing recreational opportunities that serve as a catalyst for reducing inactivity rates and improving the quality of life for residents served.

Membership Market

Membership Market

- Utilized 12-Minute Drive time
- Total Population = 229,035
  - Ages 0-18: 17%
  - Ages 19-59: 65%
  - Ages 60+: 18%
- Assumptions: Family of 4, couples 30%
- Market capture of 3% = 6,871 individuals
  - Resident 85% / Non-Resident 15%
  - Basic 60% / Premier 40%
  - Monthly 60% / Annual 40%
- Appx 5,840 residents (16% of City pop)



	Total Passes	Basic	Premier
Families of 4	598	359	239
Single Adults	2,269	1,361	908
Couples	486	292	194
Seniors	1,238	743	495
Total	**4,591**	**2,755**	**1,836**

Regional Community Center Membership

Community	Total Members	Resident Members	Percent of Membership	Non-resident Members	Percent of Membership
Dublin	8,000	6,800	85%	1,200	15%
Westerville	8,777	5,266	60%	3,511	40%
Worthington	6,105	4,274	70%	1,831	30%
Upper Arlington (projection)	6,871	5,840	85%	1,031	15%
Upper Arlington Pools	7,812	7,285	93%	527	7%

Westerville and Worthington have separate Senior Center facilities and membership is not included

Resident = individuals that live or work within city boundaries

Regional Membership – Percent of Population

Community	Population	Resident Members	Percent of Population	Community Center (SF)	Cost Recovery %
Dublin	48,647	6,800	14%	110,000	50%
Westerville*	40,387	5,266	13%	96,000	85%
Worthington	14,725	4,274	29%	72,000	70%
Upper Arlington (projection)	35,912	5,840	16%	95,300	85%
Upper Arlington Pools	35,912	7,285	21%		

*Westerville prior to 2020 expansion

Upper Arlington Recreation Participation

Upper Arlington Facility	Total Members	Resident Members	Percent of Membership	Non-resident Members	Percent of Membership
Pools	7,812	7,285	93%	527	7%
Tennis	537	356	66%	181	34%
Senior Center	2,128	1387	65%	741	35%
UA Community Center (projection)	6,871	5,840	85%	1,031	15%

Recreation Program Participation

- 3,742 individuals that were not members at UA facilities

SIMILAR PROVIDER ANALYSIS

Upper Arlington Community Center Feasibility Study

SIMILAR PROVIDER

1.1 INTRODUCTION

The Community Center Feasibility Task Force hired PROS Consulting INC. to assist in conducting a feasibility study for a new community center in the City of Upper Arlington. A key component of the feasibility study is conducting a Similar Service Provider Assessment. The purpose of this Similar Service Provider Assessment is to identify both full service and limited-service providers of recreation activities within the Upper Arlington service area. For this assessment, Full-Service Providers include local recreation providers that offer at least fitness, group fitness, indoor aquatics, and indoor sport courts at their facility. For this assessment, Limited-Service Providers are local recreation providers that provide only one or two recreational activities. The recreation activities examined within this report include; fitness, group fitness, indoor sport court providers for basketball and volleyball, and indoor aquatics. This would include such organizations as LA Fitness, LifeTime Fitness, community centers, local YMCAs, as well as many other private companies providing similar recreation offerings. This assessment was conducted from December 2019 through February 2020, and only includes facilities within twenty miles from Upper Arlington. All information collected for this assessment was obtained from official websites, or through phone conversations with agency employees.

This type of analysis then allows the Community Center Feasibility Task Force to identify which amenities and areas of recreation have the strongest need within the service area.

2.1 FULL SERVICE PROVIDERS

1.1.1 FULL SERVICE PROVIDERS LIST

The search yielded a variety of recreational service providers within the Upper Arlington service area. Full-service providers are facilities that offer fitness, group fitness, indoor aquatics and indoor sports courts. The following table is a list of the full-service providers, along with addresses, drive times and distances away from the proposed Upper Arlington Community Center.

Direct Similar Providers				
Facility	Address	Drive Time Away (Minutes)	Distance Away (Miles)	Facility Type
Thompson Community Center/Columbus Aquatics Center (Columbus Recreation & Parks Department)	1160 Hunter Ave Columbus, OH 43201	10	5	Community Center
Dublin Recreation Center	5600 Post Rd Dublin, OH 43017	22	9.4	Community Center

LA Fitness	5750 Britton Pkwy Dublin, OH 43016	17	7.4	Private
LA Fitness	260 Graceland Blvd Columbus, OH 43214	15	4.5	Private
LA Fitness	850 Goodale Blvd Columbus, OH 43212	8	5.3	Private
LifeTime Fitness	3900 Easton Station Columbus, OH 43219	25	8.9	Private
LifeTime Fitness	3825 Hard Rd Dublin, OH 43016	16	10.6	Private
McConnell Heart Health Center	3773 Olentangy River Rd Columbus, OH 43214	4	1.8	Hospital
Prairie Township Community Center	23 Maple Dr Columbus, OH 43228	17	13.9	Community Center
Premier at Sawmill Athletic Club	3111 Hayden Rd Columbus, OH 43235	10	5.1	Private
Ohio State Health & Fitness Center	150 W Main St New Albany, OH 43054	25	20	University
Westerville Community Center	350 N Cleveland Ave Westerville, OH 43082	19	13.4	Community Center
Worthington Community Center	6550 N High St Worthington, OH 43085	13	6.6	Community Center
YMCA- Gahanna	555 YMCA Place Gahanna, OH 43230	22	16.6	Non-Profit
YMCA- Garver	6767 Refugee Rd Canal Winchester, OH 43110	25	19.4	Non-Profit
YMCA- Grove City	3600 Discovery Dr Grove City, OH 43123	25	16.5	Non-Profit
YMCA- Hairston	3500 First Ave Urbancrest, OH 43123	20	12.1	Non-Profit
YMCA- Hilliard	4515 Cosgray Rd Hilliard, OH 43026	19	8.6	Non-Profit
YMCA- Hilltop	2879 Valleyview Dr Columbus, OH 43204	16	6.9	Non-Profit
YMCA- Liberty Township	7798 North Liberty Rd Powell, OH 43065	24	14.5	Non-Profit

YMCA-North	1640 Sandalwood Place Columbus, OH 43229	18	7.7	Non-Profit
YMCA- Reynoldsburg	1470 Davidson Dr Reynoldsburg, OH 43068	24	20	Non-Profit
YMCA- Ward Family	130 Woodland Ave Columbus, OH 43203	14	9.8	Non-Profit

1.1.2 FULL SERVICE PROVIDERS MEMBERSHIP PRICING

The following table is a comparison of membership prices for single, couple, and family memberships for the full-service providers. All facilities do not price memberships the same way. For this comparison prices are based on an annual membership paid monthly. Worthington does not offer a monthly payment option for couple or family memberships. To create a comparable number, the annual membership amount was divided by twelve to calculate the monthly rate for this analysis. Not all facilities have a flat rate for family memberships, some facilities charge for each member on the account. For this comparison, a family membership refers to a membership consisting of two adults and two children. All values used are rates for residents. Averages have been rounded to the nearest dollar. More detailed membership rate information is available later in this report. There is no charge to attend the Columbus Community Centers. **Agency pricing varies based on cost recovery goals and provision of non-fee-based services.**

Direct Similar Providers- Fitness Membership Pricing			
Agency	**Monthly Rate- Single Adult Membership**	**Monthly Rate- Couple Membership**	**Monthly Rate- Family (4) Membership**
City of Dublin	$21	$35.58	$53.08
LA Fitness	$34.99	$69.98	$139.96
Life Time Fitness	$49	$89	$109
McConnell	$88.15	$146.20	N/A
Ohio State Health & Fitness Center	$89	$129	$159
Prairie Township	$18.92	$32.42	$41.50
Prairie Township w/ Group Fitness	$38.92	$52.42	$61.50
Premier at Sawmill Athletic Club	$89	$114	$144
City of Westerville	$26	$52	$70
City of Worthington*	$21.67	$35	$47.50
YMCA- Hilltop, North, Ward	$36.99	$52.99	$57.99

YMCA- Gahanna, Grove City, Hairston, Liberty	$49.99	$76.99	$86.99
YMCA- Hilliard	$43.99	$71.99	$76.99
YMCA- Garver, Reynoldsburg	$39.99	$62.99	$68.99
Average: *	***$46***	***$73***	***$86***

* Annual Membership divided by 12
** Rounded to Nearest Dollar

Key Takeaways:

- Highest Single Membership Rate: Premier at Sawmill, & OSU Fitness Center- $89/Month
- Lowest Single Membership Rate: Dublin Community Center- $21/Month
- Average Single Membership Rate: $46/Month

1.1.3 YMCA MEMBERSHIP PRICING

The YMCAs of Central Ohio have four different membership pricing options depending on the facilities. All facilities have both monthly and annual membership options. All locations have discounts for adults under thirty, adults over sixty-one, teens and children. Seniors receive a ten percent discount on monthly memberships. All Central Ohio locations have an enrollment fee of twenty-five dollars per adult member on monthly memberships only.

YMCA-Hilltop, North, Ward			
Membership Pricing			
Membership Type	Monthly Rate	Annual Rate	Enrollment Fee*
Adult (30-61)	$36.99	$369.99	$25
Young Adult (18-29)	$31.99	$319.99	$25
Senior (62+)	$33.29	$369.99	$25
Youth/Teen (9-17)	$17.99	$179.99	$25
Child (0-8)	$9.99	$99.99	$25
1 Adult + 2 Kids	$49.99	$499.99	$25
2 Adults	$52.99	$529.99	$50
2 Adults + Kids	$57.99	$579.99	$50
2 Seniors	$47.69	$529.99	$50

YMCA-Garver, Reynoldsburg			
Membership Pricing			
Membership Type	Monthly Rate	Annual Rate	Enrollment Fee*
Adult (30-61)	$39.99	$399.99	$25
Young Adult (18-29)	$31.99	$319.99	$25
Senior (62+)	$35.99	$399.99	$25
Youth/Teen (9-17)	$17.99	$179.99	$25
Child (0-8)	$9.99	$99.99	$25

1 Adult + 2 Kids	$55.99	$559.99	$25
2 Adults	$62.99	$629.99	$50
2 Adults + Kids	$68.99	$689.99	$50
2 Seniors	$56.69	$629.99	$50

YMCA-Hilliard			
Membership Pricing			
Membership Type	Monthly Rate	Annual Rate	Enrollment Fee*
Adult (30-61)	$43.99	$439.99	$25
Young Adult (18-29)	$32.99	$329.99	$25
Senior (62+)	$39.59	$439.99	$25
Youth/Teen (9-17)	$19.99	$199.99	$25
Child (0-8)	$9.99	$99.99	$25
1 Adult + 2 Kids	$60.99	$609.99	$25
2 Adults	$71.99	$719.99	$50
2 Adults + Kids	$76.99	$769.99	$50
2 Seniors	$64.79	$719.99	$50

YMCA-Gahanna, Grove City, Hairston, Liberty,			
Membership Pricing			
Membership Type	Monthly Rate	Annual Rate	Enrollment Fee*
Adult (30-61)	$49.99	$499.99	$25
Young Adult (18-29)	$32.99	$329.99	$25
Senior (62+)	$44.99	$499.99	$25
Youth/Teen (9-17)	$19.99	$199.99	$25
Child (0-8)	$9.99	$99.99	$25
1 Adult + 2 Kids	$69.99	$699.99	$25
2 Adults	$76.99	$769.99	$50
2 Adults + Kids	$86.99	$869.99	$50
2 Seniors	$69.29	$769.99	$50

1.1.4 DUBLIN RECRATION CENTER MEMBERSHIP PRICING

The Dublin Recreation Center offers three different rates for memberships: resident, school district, and non-resident pricing. Dublin does not have flat rate for a family membership, but charges for each individual member up to five members. Dublin also has discounted rates for military/veterans, as well as students. Six-month membership options are also available for prepay.

Dublin Recreation Center Membership Pricing			
Membership Type	**Annual Rate R/SD/NR**	**Monthly Rate R/SD/NR**	**6 Month Membership Rate Residents Only**
Individual	$240/$440/$660	$21/$37.67/$56	$145
Household of 2	$415/$730/$1,160	$35.58/$61.83/$97.67	$250
Household of 3	$545/$980/$1,535	$46.42/$82.67/$128.92	$330
Household of 4	$625/$1,055/$1,730	$53.08/$88.92/$145.17	$375
Household of 5+	$665/$1,125/$1,905	$56.42/$94.75/$159.75	$405
Senior (60+)	$120/$170/$220	$11/$15.17/$19.33	
Student	$120/$225/$345		
Corporate Rate	$270	$23.50	
Military/Veteran	$220/$400/$600		

Dublin Recreation Center Daily Admission Rates		
Day Pass Type	**Resident Rate**	**Nonresident Rate**
Adult (18+)	$7	$15
Youth (3-17)	$5	$7
2 and Under	Free	Free

1.1.5 LIFETIME FITNESS COMPLETE MEMBERSHIP PRICING

The following is list of the membership pricing options at LifeTime Fitness. A single membership price is based on age; adults over twenty-seven years pay a higher amount. No discount for seniors is given. Additional members on the account pay more if they are over the age of fourteen. No set rate for family memberships, each additional member pays extra. One-day and five-day passes are available.

LifeTime Fitness Membership Pricing		
Membership Type	**Monthly Rate**	**Enrollment Fee**
Adult (27+)	$49	$29
Adult (Under 27)	$44	
Additional Member (14+)	$40	
Additional Member (Under 14)	$10	
Day Pass	$30	
5 Day Pass	$120	

1.1.6 LA FITNESS MEMBERSHIP PRICING

LA Fitness has two pricing options; single-club and multi-club memberships. LA Fitness does not give a discount for additional individuals on each membership. LA Fitness also charges a $49 annual fee.

LA Fitness Membership Pricing	
Membership Type	**Monthly Rate**
Each Person- Single Club	$34.99
Each Person- Multi-Club	$39.99
Annual Fee	$49

1.1.7 OHIO STATE UNIVERSITY HEALTH & FITNESS MEMBERSHIP PRICING

Below are the rates for individuals not affiliated with Ohio State University. Enrollment fees are extremely high for this facility. However, let it be noted that these are their "official" enrollment fees, and are more than likely heavily discounted throughout the year. These amounts were offered at an eighty-percent discount in January 2020.

Ohio State Health & Fitness Center		
Membership Type	Monthly Rate	Enrollment Fee
Single	$89	$299
Couple	$129	$549
Family	$159	$599

1.1.8 WESTERVILLE COMMUNITY CENTER MEMBERSHIP PRICING

As with most community centers, Westerville offers a discounted rate for residents. There are no additional fees for households over three individuals. Seniors are classified as individuals over sixty-five. Daily rates are available, and are also discounted for youths, and seniors.

Westerville Community Center Membership Pricing		
Membership Type	Monthly Rate R/NR	Daily Rate R/NR
Adult (16-64)	$26/$45	$7/$12
Youth (3-15)	$20/$35	$5/$9
Senior (65+)	$24/$42	$6/$11
Household (3+)	$70/$120	N/A

1.1.9 MCCONNELL HEART HEALTH CENTER MEMBERSHIP PRICING

Instead of an enrollment fee, McConnell charges an assessment fee of $199. The assessment fee is to determine your current level of physical fitness and is required by everyone who joins the facility. Only individuals who are at least eighteen years of age are allowed to be members.

McConnell Heart Health Center Membership Pricing		
Membership Type	Monthly Rate	Assessment Fee*
Individual	$88.15	$199
Additional Member**	$58.05	$199

*Physical Assessment required to join facility
** All members must be at least 18 years of age

1.1.10 WORTHINGTON COMMUNITY CENTER MEMBERSHIP PRICING

Worthington also offers discounted rates for residents. Monthly rates are only available for adults, and seniors. No monthly membership options are available for multi-person memberships. Worthington charges an additional fee for every member on a family membership.

Worthington Community Center		
Membership Pricing		
Membership Type	Annual Rate R/NR	Monthly Rate R/NR
Adult	$260/$338	$45/$59
Teen (12-17)	$160/$208	
Senior (60+)	$180/$234	$35/$46
Individual + Child (3-11)	$380/$494	
Household of 2	$420/$546	
Household of 3	$495/$644	
Household of 4	$570/$741	
Additional Person (after 4)	$50/$65	

Short-term passes are also available at the Worthington Community Center. Five-visit passes are available to adults and seniors, and ten-visit passes are available to children. A discount is available for military day passes.

Worthington Community Center	
Short-Term Membership Pricing	
Membership Type	Rate
Day Pass- Adult	$8
Day Pass- Child	$5
Day Pass- Senior (60+)	$6
Day Pass- Military	$5
10 Pass- Child	$40
5 Pass- Adult	$35
5 Pass- Senior	$25

1.1.11 PRAIRIE TOWNSHIP COMMUNITY CENTER MEMBERSHIP PRICING

The Prairie Township Community Center has two different membership types; standard and full membership. The full membership includes unlimited access to group fitness classes and childcare. The full membership is twenty dollars more per month than the standard membership. First month's dues and a twenty-four-dollar enrollment fee is due at signing. Month-to-Month standard memberships are available to adults, young adults, and seniors. Discounts are available to residents regardless of age.

Prairie Township Community Center Membership Pricing- Standard Membership			
Membership Type	**Annual Rate R/NR**	**Annual Membership Paid Monthly R/NR**	**Month-to-Month Rate R/NR**
Adult (25-54)	$227/$340.50	$18.92/$28.38	$29.99/$44.99
Young Adult (19-24)	$195/$292.50	$16.25/$24.38	$20/$30*
Teen (10-18)	$184/$276	$15.33/$23	
Senior (55+)	$109/$163.50	$9.08/$13.63	$19.99/$29.99
Senior Couple	$203/$304.50	$16.92/$25.38	
Family of 2	$389/$583.50	$32.42/$48.63	
Family of 3+	$498/$747	$41.50/$62.25	

*College Student

Prairie Township Community Center Membership Pricing- Full Membership		
Membership Type	**Annual Rate R/NR**	**Annual Membership Paid Monthly R/NR**
Adult (25-54)	$467/$580.50	$38.92/$48.38
Young Adult (19-24)	$435/$532.50	$36.25/$44.38
Teen (10-18)	$424/$516	$35.33/$43
Senior (55+)	$349/$403.50	$29.08/$33.63
Senior Couple	$443/$544.50	$36.92/$45.38
Family of 2	$629/$823.50	$52.42/$68.63
Family of 3+	$738/$987.50	$61.5/$82.25

3.1 LIMITED SERVICE PROVIDERS

3.1.1 LIMITED SERVICE PROVIDERS BY TYPE

The following table is a breakdown of each limited-service provider by type and quantity. Fitness facilities are broken down into subcategories of: private gym, yoga studio, community center, group fitness studio, crossfit, boxing/kickboxing, dance/barre, specialty fitness, and Pilates studio. Specialty fitness includes athletic training facilities, facilities specializing in Olympic lifts, cycling, and kids' fitness. The community centers listed in this section do not have an indoor aquatic facility, as well as two LifeTime Fitness Centers. This search yielded one hundred sixteen fitness facilities, twenty-seven indoor sport court facilities, and two indoor aquatic facilities in the Upper Arlington service area.

Limited-Service Providers	
Facility Type	**Quantity**
Private Gym	24
Yoga Studio	21
Community Center	20
Group Fitness Studio	16
Crossfit	10
Boxing/Kickboxing/MMA	8
Dance/Barre Studio	7
Specialty Fitness*	6
Pilates Studio	4
Indoor Sport Court Facilities	27
Indoor Aquatic Facilities	2
Total:	***145***

*Athletic Training, Olympic Lifts, Cycling, Climbing, & Kids Fitness

3.1.2 LIMITED SERVICE PROVIDERS- FITNESS

The following is a list of all fitness providers within a twenty-mile radius of Upper Arlington. The table includes facility name, location, facility type, drive time and distance away from the proposed community center. The following search yielded one hundred sixteen fitness providers within the area.

Limited-Service Providers-Fitness				
Facility	**Address**	**Drive Time Away (Minutes)**	**Distance Away (Miles)**	**Facility Type/ Affiliation**
All Hustle Fitness	5903 Karric Square Dr Dublin, OH 43016	14	6.5	Group Fitness
Ashtanga Yoga Columbus	4684 Indianola Ave Columbus, OH 43214	11	4.9	Yoga
Barnett Community Center	1184 Barnett Rd Columbus, OH 43227	20	13.6	Community Center
Barre3 Columbus	1735 Lane Ave Columbus, OH 43221	5	1.9	Barre
Be Yoga and Wellness	1840 Zollinger Rd Columbus, OH 43221	2	1.1	Yoga
Beatty Community Center	247 N Ohio Ave Columbus, OH 43203	13	8.4	Community Center
Bikram Hot Yoga Columbus	947 W 3rd St Columbus, OH 43212	9	3.9	Yoga
Blackburn Community Center	263 Carpenter St Columbus, OH 43205	13	8.8	Community Center
The Bodywell Studio	272 Hanover St Columbus, OH 43215	10	6.2	Pilates
Brentnell Community Center	1280 Brentnell Ave Columbus, OH 43219	22	7.2	Community Center
Buckeye Strength & Performance Crossfit	1025 W 3rd Ave Columbus, Oh 43212	10	3.8	Crossfit
Buckeye Strength & Performance Crossfit	1066 Ridge St Columbus, OH 43215	10	7	Crossfit
Carriage Place Community Center	4900 Sawmill Rd Columbus, OH 43235	11	4.5	Community Center
Centered Yoga + Movement	679 High St Worthington, OH 43085	10	6	Yoga
Club Pilates	1080 Yard St Grandview Heights, OH 43212	9	5.8	Pilates

Columbus Sports Connection	4250 N High St Columbus, OH 43214	8	3.3	Private Gym
CrossFit Clintonville	609 Oakland Park Ave Columbus, OH 43214	9	3.1	Crossfit
CrossFit GCG	2294 Scioto Harper Dr Columbus, OH 43204	16	6.9	Crossfit
Crossfit Grandview	880 Kinnear Rd Columbus, Oh 43212	5	3.5	Crossfit
Crossfit Hilliard	4655 Northwest Pkwy Hilliard, OH 43026	14	6.1	Crossfit
Crunch Fitness Hilliard	3644 Fishinger Blvd Hilliard, OH 43026	9	3.8	Private Gym
Cycle614	1636 Northwest Blvd Columbus, OH 43212	8	3.5	Specialty Fitness- Cycling
Dodge Community Center	667 Sullivant Ave Columbus, OH 43215	9	6.5	Community Center
Douglas Community Center	1250 Windsor Ave Columbus, OH 43211	17	6.5	Community Center
Endeavor Defense & Fitness	5040 Nike Dr Hilliard, OH 43026	19	8.2	Group Fitness
Far East Community Center	1826 Lattimer Dr Columbus, OH 43227	24	16.9	Community Center
Feddersen Community Center	3911 Dresden St Columbus, OH 43224	19	6.3	Community Center
Fitness Evolution	4828 N High St Columbus, OH 43214	10	3.7	Group Fitness
Friendship Crossfit	6625 Reflections Dr Dublin, OH 43017	13	6.3	Crossfit
Give Yoga	3520 N High St Columbus, OH 43214	6	2.3	Yoga
Go Fitness Grandview	1459 King Ave Columbus, OH 43212	8	3.2	Private Gym
Go Sports Performance Center	1392 King Ave Columbus, OH 43212	8	3.3	Specialty Fitness- Athletic Training
Go Yoga	2132 Arlington Ave Columbus, OH 43221	7	2.6	Yoga
Go Yoga	1520 W 1st Ave Columbus, OH 43212	13	4.2	Yoga
Go Yoga	2240 W Dublin Granville Rd Columbus, OH 43085	10	5.9	Yoga

Grandview Barbell	1488 Grandview Ave Columbus, OH 43212	10	3.7	Crossfit
Grandview Pro Fitness	840 Grandview Ave Columbus, OH 43215	10	7.2	Private Gym
Heartfelt Yoga Studio	29 E 5th Ave Ste 100 Columbus, OH 43201	12	5.2	Yoga
Holton Community Center	303 N Eureka Ave Columbus, OH 43204	20	7.4	Community Center
Howard Community Center	2505 N Cassady Ave Columbus, OH 43219	20	7.3	Community Center
Human Form Fitness	1197 Chesapeake Ave Columbus, OH 43212	9	3.3	Group Fitness
ILoveKickboxing	2264 W Henderson Rd Columbus, OH 43220	7	3.1	Kickboxing
Improvement Warrior Yoga	4601 Leap Ct Hilliard, OH 43026	14	5.8	Yoga
Indian Mound Community Center	3901 Parsons Ave Columbus, OH 43207	19	13.6	Community Center
Jackhammer Strength Training	3002 McKinley Ave Columbus, OH 43204	12	4.9	Group Fitness
Jazzercise Upper Arlington	1145 Kenny Centre Mall Upper Arlington, OH	3	1.4	Dance Fitness
Kinetic Climbing & Fitness	717 Hadley Dr Columbus, OH 43228	17	6.8	Specialty Fitness- Climbing
Lazelle Woods Community Center	8140 Sancus Blvd Westerville, OH 43081	17	10.3	Community Center
Life Time Fitness	1860 Henderson Rd Columbus, OH 43220	5	2.6	Private Gym
LifeTime Fitness	1520 Stonecreek Dr Pickerington, OH 43147	26	20	Private Gym
Linden Community Center	2001 Hamilton Ave Columbus, OH 43211	17	4.8	Community Center
Linworth Crossfit	6356 Eberstark Dr Columbus, OH 43235	12	6.2	Crossfit
LIT Life + Yoga	999 N 4th St Columbus, OH 43201	10	6.8	Yoga
Marion Franklin Community Center	2801 Lockbourne Rd Columbus, OH 43207	18	12.9	Community Center

Mat Happy Yoga	4477 Cemetery Rd Hilliard, OH 43026	13	5.3	Yoga
Metro Fitness-Bethel	863 Bethel Rd Columbus, OH 43214	6	2.6	Private Gym
Metro Fitness Hilliard	3440 Heritage Club Dr Hilliard, OH 43026	17	7.3	Private Gym
Milo Grogan Community Center	862 E 2nd Ave Columbus, OH 43201	19	7.2	Community Center
Modo Yoga	1042 Dublin Rd Columbus, OH 43215	10	7.3	Yoga
Om for Mom Prenatal Yoga	1152 Kenny Centre Mall Columbus, OH 43220	2	1.4	Yoga
Orangetheory Fitness-Grandview	1009 W 5th Ave Columbus, OH 43212	8	3.5	Group Fitness
Orangetheory Fitness-Hilliard	3959 Britton Pkwy Hilliard, OH 43026	13	5.5	Group Fitness
Orangetheory Fitness	214 Fallis Rd Columbus, OH 43214	9	3	Group Fitness
Orangetheory Fitness Short North Columbus	977 N High St Columbus, OH 43201	12	6.9	Group Fitness
PAI Yoga & Fitness	6367 Sawmill Rd Dublin, OH 43017	13	6.5	Group Fitness
Pilates Innovations	4425 N High St Columbus, OH 43214	8	3.1	Pilates
The Pilates Studio	1562 King Ave Columbus, OH 43212	9	3.1	Pilates
Pilger's Old Skool Boxing & Fitness Academy	1034 Goodale Blvd Columbus, OH 43212	9	5.5	Boxing
Planet Fitness	2060 Crown Plaza Dr Columbus, OH 43235	8	3.5	Private Gym
Planet Fitness	3614 Indianola Ave Columbus, OH 43214	9	3.3	Private Gym
Planet Fitness	2582 Sawmill Place Blvd Columbus, OH 43235	16	8.3	Private Gym
Planet Fitness	5415 Roberts Rd Hilliard, OH 43026	16	7.7	Private Gym
Power Shack Gym-Hilliard	3600 Fishinger Blvd Hilliard, OH 43026	8	3.8	Private Gym

Project Lift	5040 Nike Dr Hilliard, OH 43026	19	8.2	Specialty Fitness- Olympic Lifts
Pure Barre	960 W 5th Ave Columbus, OH 43212	9	3.6	Barre
Pure Barre	3650 W Dublin Granville Rd Columbus, OH 43235	16	8.2	Barre
Pursuit Fitness Center	3025 Northwest Blvd Columbus, OH 43221	2	1	Private Gym
Radiant Yoga and Wellness	634 High St Worthington, OH 43085	12	6.1	Yoga
Renovo Fitness	5224 Cemetery Rd Hilliard, OH 43026	15	6.3	Group Fitness
Ronin Training Center	1012 W 3rd Ave Columbus, OH 43212	9	3.8	MMA
Ryze Athletics	2350 Wood Avenue Columbus, OH 43221	5	2.1	Private Gym
Schiller Community Center	1069 Jaeger St Columbus, OH 43206	14	8.8	Community Center
Self Made Training Facility	3675 Park Mill Run Dr Hilliard, OH 43026	11	4.2	Private Gym
Shed Fitness Columbus	3977 Trueman Blvd Hilliard, OH 43026	10	4.7	Group Fitness
Snap Fitness	3130 N High St Columbus, OH 43202	7	2.5	Private Gym
Snap Fitness	1409 W 3rd Ave Columbus, OH 43212	10	4	Private Gym
Snap Fitness	2080 Arlington Ave Columbus, OH	7	2.7	Private Gym
Snap Fitness	18 E Hubbard Ave Columbus, OH 43215	12	6.7	Private Gym
Southpaw Boxing Club	4920 Scioto Darby Rd Hilliard, OH 43026	14	6.7	Boxing
The Spot Athletics	1515 Delashmut Ave Columbus, OH 43212	7	4.1	Specialty Fitness- Athletic Training
Studio Rouge	1411 W 3rd Ave Columbus, OH 43212	11	4	Dance Fitness
Sweat Box	935 King Ave Columbus, OH 43212	8	3.3	Private Gym
System of Strength	851 W 5th Ave Grandview, OH 43212	7	4.2	Group Fitness

System of Strength	3560 N High St Clintonville, OH 43214	7	2.3	Group Fitness
Title Boxing Club Grandview	955 W 5th Ave Columbus, OH 43212	9	3.6	Boxing
Title Boxing Club	1134 W Henderson Rd Columbus, OH 43220	3	1.6	Boxing
TRAIN Fitness House	4516 Kenny Rd Columbus, OH 43220	3	1.4	Private Gym
UA Fitness	2100 Tremont Ctr Upper Arlington, OH 43221	5	1.5	Private Gym
Upper Arlington Crossfit	4660 Kenny Rd Columbus, OH 43220	4	2	Crossfit
Verve	1220 Courtland Ave Columbus, OH 43201	10	5.2	Group Fitness
Vital Vinyasa	1327 King Ave Columbus, OH 43212	8	3.5	Yoga
Wendy's Gymnastic & Fitness for Children	2460 Wood Ave Columbus, OH 43221	6	2.1	Specialty Fitness- Kids Fitness
Westgate Community Center	455 S Westgate Ave Columbus, OH 43204	17	10.7	Community Center
Whetstone Community Center	3923 N High St Columbus, OH 43214	8	2.9	Community Center
William H Adams Community Center	854 Alton Ave Columbus, OH 43219	16	10.7	Community Center
Workshop Method	3504 N High St Columbus, OH 43214	6	2.2	Group Fitness
Yoga on High	1780 W 5th Ave Columbus, OH 43212	10	3.5	Yoga
Yoga on High	1020 Dennison Ave Ste 202 Columbus, OH 43201	12	6.6	Yoga
Yoga Six	1600 W Lane Ave Columbus, OH 43221	7	2.2	Yoga
Yoga Six	1624 N High St Columbus, OH 43201	14	4.2	Yoga
Yoga Well Being	296 W 4th Ave Columbus, OH 43201	10	4.8	Yoga
Z with Jen B	4310 N High St Ste 4310 Columbus, OH 43214	8	3.2	Zumba
Zumba Columbus	1222 Kenny Centre Mall Columbus, OH 43220	3	1.4	Zumba

614 Barbell	4565 Scioto Darby Rd Columbus, OH 43228	12	6.1	Private Gym
9 Round Hilliard	2606 Hilliard Rome Rd Hilliard, OH 43026	17	7.9	Boxing
9 Round	4219 N High St Columbus, OH 43214	8	3.3	Boxing

3.1.3 LIMITED SERVICE PROVIDERS- INDOOR SPORT COURTS

There are twenty-seven facilities that have indoor sport courts. Many of these facilities are community centers that do not offer indoor aquatics.

Limited-Service Providers-Indoor Courts				
Facility	**Address**	**Drive Time Away (Minutes)**	**Distance Away (Miles)**	**Offerings**
Barnett Community Center	1184 Barnett Rd Columbus, OH 43227	20	13.6	gym/fitness
Beatty Community Center	247 N Ohio Ave Columbus, OH 43203	13	8.4	gym/fitness
Big Run Athletic Complex	4205 Clime Rd Columbus, OH 43228	20	12.4	gym
Bill McDonald Athletic Complex	4990 Olentangy River Rd Columbus, OH 43214	7	3	gym
Blackburn Community Center	263 Carpenter St Columbus, OH 43205	13	8.8	gym/fitness
Carriage Place Community Center	4900 Sawmill Rd Columbus, OH 43235	11	4.5	gym/fitness
Cleo Dumaree Athletic Complex	276 S Nelson Rd Columbus, OH 43205	18	11.9	gym
Dodge Community Center	667 Sullivant Ave Columbus, OH 43215	9	6.5	gym/fitness
Douglas Community Center	1250 Windsor Ave Columbus, OH 43211	17	6.5	gym/fitness
Far East Community Center	1826 Lattimer Dr Columbus, OH 43227	24	16.9	gym/fitness
Feddersen Community Center	3911 Dresden St Columbus, OH 43224	19	6.3	gym/fitness
Holton Community Center	303 N Eureka Ave Columbus, OH 43204	20	7.4	gym/fitness
Howard Community Center	2505 N Cassady Ave Columbus, OH 43219	20	7.3	gym/fitness

Lazelle Woods Community Center	8140 Sancus Blvd Westerville, OH 43081	17	10.3	gym/fitness
Linden Community Center	2001 Hamilton Ave Columbus, OH 43211	17	4.8	gym/fitness
Marion Franklin Community Center	2801 Lockbourne Rd Columbus, OH 43207	18	12.9	gym/fitness
Milo Grogan Community Center	862 E 2nd Ave Columbus, OH 43201	19	7.2	gym/fitness
Ryze Athletics	2350 Wood Avenue Columbus, OH 43221	5	2.1	gym/fitness
Schiller Community Center	1069 Jaeger St Columbus, OH 43206	14	8.8	gym/fitness
Sullivant Gardens Community Center	755 Renick St Columbus, OH 43223	12	7.4	gym/fitness
Thompson Community Center	1189 Dennison Ave Columbus, OH 43201	11	5	gym
Tuttle Park Community Center	240 W Oakland Ave Columbus, OH 43201	11	3.5	gym
Westgate Community Center	455 S Westgate Ave Columbus, OH 43204	17	10.7	gym/fitness
Whetstone Community Center	3923 N High St Columbus, OH 43214	8	2.9	gym/fitness
William H Adams Community Center	854 Alton Ave Columbus, OH 43219	16	10.7	gym/fitness
Willis Athletic Complex	2520 Mock Rd Columbus, OH 43219	20	6.7	gym
Woodward Park Community Center	5147 Karl Rd Columbus, OH 43229	18	7.3	gym

3.1.4 INDIRECT SIMILAR PROVIDERS- INDOOR AQUATIC CENTERS

The following are the two indoor aquatic facilities that don't have fitness centers or sport courts in the same facility

Limited-Service Providers-Indoor Aquatic Center				
Facility	**Address**	**Drive Time Away (Minutes)**	**Distance Away (Miles)**	**Facility Type**
Aquatic Adventures	3940 Lyman Dr Hilliard, OH 43026	13	5.1	Indoor Pool
Columbus Aquatic Center	1160 Hunter Ave Columbus, OH 43201	10	5	Indoor Pool

4.1 FACILITY AMENITIES

4.1.1 RECREATION PROVIDER AMENITIES

The following is a list of amenities available for all direct similar providers. Amenities included in this report are; fitness center, group fitness classes, indoor lap lanes, indoor leisure pool, indoor water slides, indoor water play features, indoor diving boards, indoor basketball courts, indoor walking track, and senior centers.

Recreation Provider Amenities	Fitness Center	Group Fitness Classes	Indoor Lap Swim Lanes	Indoor Leisure Pool	Indoor Water Slides	Indoor Water Play Features	Indoor Diving Boards	Indoor Basketball Courts	Indoor Walking Track	Senior Center
Aquatic Adventures			6							
Columbus R&P	X	X	6				X	X	X	X
Dublin Recreation Center	X	X	10	X	X	X	X	X	X	X
LA Fitness	X	X	3					X		
Life Time Fitness (Dublin & Easton)	X	X	5	X	X			X		
McConnell Heart Health Center	X	X	4					X	X	
Prairie Township	X	X	2	X		X	X	X	X	X
Premier at Sawmill Athletic Club	X	X	6							
Ohio State Health & Fitness Center	X	X	3							
Westerville Community Center	X	X	8	X	X	X	X	X	X	X
Worthington Community Center	X	X	4	X	X	X		X	X	
YMCA- Gahanna	X	X	6	X	X			X	X	
YMCA- Garver	X	X	5					X	X	

YMCA- Grove City	**X**	**X**	**4**	**X**	**X**			**X**	**X**	
YMCA- Hairston	**X**	**X**	**6**					**X**		
YMCA- Hilliard	**X**	**X**	**5**	**X**	**X**			**X**	**X**	
YMCA- Hilltop	**X**	**X**	**4**					**X**		
YMCA- Liberty Township	**X**	**X**	**6**	**X**	**X**			**X**	**X**	
YMCA-North	**X**	**X**	**6**					**X**		
YMCA- Reynoldsburg	**X**	**X**	**4**					**X**	**X**	
YMCA- Ward Family	**X**	**X**	**4**					**X**		

Key Takeaways:

- Senior Centers were the least provided, with only four agencies providing senior centers.
- Only four agencies offer indoor water play features.
- Only four agencies offer indoor diving boards.
- Only Westerville Community Center offers all amenities.

5.1 FACILITY OFFERINGS

5.1.1 RECREATION PROGRAM OFFERINGS

The following table is a comparison of the indoor recreation offerings available at each agency. The table includes youth group swim lessons, adult group swim lessons, private swim lessons, swim team, aquatic fitness, youth basketball leagues, adult basketball leagues, and adult volleyball leagues. YMCA lists they offer adult sport leagues, but none were currently offered, and none were on the upcoming schedule at any Central Ohio YMCAs.

Recreation Program Offerings	Youth Group Swim Lessons	Adult Group Swim Lessons	Private Swim Lessons	Swim Team	Aquatic Fitness Classes	Youth Basketball Leagues	Adult Basketball Leagues	Adult Volleyball Leagues
Aquatic Adventures	X	X	X					
Columbus Rec & Parks Dept.	X	X		X	X	X	X	X
Dublin Recreation Center	X			X	X	X	X	X
LA Fitness	X	X			X			
Life Time Fitness (Dublin & Easton)	X	X			X			
McConnell Heart Health Center			X		X			
Prairie Township	X	X	X		X	X		
Premier at Sawmill Athletic Club	X	X	X		X			
Ohio State Health & Fitness Center	X	X	X		X			
Westerville Community Center	X	X	X	X	X	X	X	X
Worthington Community Center	X			X	X	X	X	X
YMCA	X	X	X	X	X	X		

Key Takeaway:

- Westerville Community Center has the most indoor programming options available, providing all eight.
- Adult sport leagues were the least offered, with only four agencies providing the service.
- Group youth swim lessons and aquatic fitness classes were the most offered service with eleven providers of each.

6.1 COURT RENTAL PRICING

6.1.1 BASKETBALL COURT RENTAL RATES

Below are the hourly basketball court rental rates at each facility for a full court rental. Columbus requires a two-hour minimum rental time. All agencies offer a discount for residents. Only Worthington charges an additional rate for weekend rentals. Averages are rounded to the nearest dollar.

Court Rental Rates		
Agency	Weekday Hourly Rate R/NR	Weekend Hourly Rate R/NR
Columbus R&P	37.50*	$37.50*
Dublin Recreation Center	$30/$55	$30/$55
Prairie Township	$80/$120	$80/$120
Worthington Community Ctr.	$20/$50	$25/$55
Average Hourly Rate Resident:	***$42***	***$43***

* 2 Hour Minimum

Key Takeaways:

- Highest Court Rental Hourly Rate: Columbus - $80/ Hour
- Lowest Court Rental Hourly Rate: Worthington - $20/ Hour
- Average Court Rental Hourly Rate: $42/ Hour

7.1 ACTIVITY PRICING

7.1.1 YOUTH LEAGUE BASKETBALL PRICING

Below are the costs per child to participate in a youth basketball league. Westerville is the only agency that does not charge a different amount based on the participant's age. YMCA offers a discounted rate for members. The average cost for a child resident to participate in a basketball league is $74.

Youth Basketball League Pricing		
Agency	**League Cost per Child**	**Number of Regular Season Games**
Columbus Recreation & Parks	8U, 6U: $35, 18U-10U: $60	8
Dublin Recreation Center	1st-2nd Grade: $90 3rd-6th Grade: $125 7th-12th Grade: $150	1st-6th grade: 6 7th-12th grade: 8
Prairie Township	Age 3-6: $30/$35 Ages 6-10: $35/$38	4
Westerville Community Center	1st-8th Grade: $60/$75	7
Worthington Community Center	K-2nd Grade: $85 3rd-6th Grade: $100	9
YMCA	K-2nd Grade: $55/$85 3-4 Grade: $55/$85 5-6 Grade: $65/$95 7-8th Grade $80/$100 9-12th Grade: $80/$110	16
Average Cost Resident:	***$74***	

7.1.2 ADULT BASKETBALL PRICING

Below are the rates to participate in an adult basketball league at each facility. Dublin is the only agency that allows individuals to sign up; all other agencies require members to join as a team. The average cost of an adult basketball league team for residents is $415.

Adult Basketball League Pricing		
Agency	**League Cost**	**Number of Regular Season Games**
Columbus Recreation & Parks	Team: $435	8
Dublin Recreation Center	Team: $449 Individual: $59	6
Westerville Community Ct.	Team: $450/$465	10
Worthington Community Ctr.	Team: $325/$425	8
Average Team Cost Resident:	***$415***	

7.1.3 ADULT VOLLEYBALL PRICING

Only Columbus does not offer a discount for residents. All agencies require sign-ups as a team. The average cost for a resident adult volleyball team is $248.

Adult Volleyball League Pricing		
Agency	**League Cost**	**Number of Regular Season Games**
Columbus Recreation & Parks	$285	8
Dublin Recreation Center	$230/$255	10
Westerville Community Ctr.	$250/$265	10
Worthington Community Ctr.	$225/$300	10
Average Team Cost Resident:	***$248***	

8.1 AQUATIC PRICING

8.1.1 GROUP SWIM LESSON PRICING

Below are the rates for residents and non-residents for both children and adults for group swim lessons. Both LA Fitness and Ohio State University use the Safe Splash Swim School to teach swim lessons. The average cost for child group swim lessons is $71, and the average cost of adult swim lessons is $79.

Group Swim Lesson Rates			
Agency	**Child Lesson Rates R/NR**	**Adult Lesson Rates R/NR**	**Number of Lessons**
Aquatic Adventures	Under 3: $56 3-5 yrs.: $80 Over 6 yrs.: $96 Stroke Clinic: $120 (8)	Drop In: $20 $150/ 12 sessions	Youth: 4
Columbus R&P	$40/$50	$40/$50	6
Dublin Rec. Ctr.	$72/$88	$92/$102	8
LA Fitness*	$75	$90	4
OSU*	$75	$90	4
Prairie Township	$80/$96	$80/$96	10
Westerville Comm. Ctr.	$45/$55	$45/$55	8
Worthington Comm. Ctr.	$51.67	N/A	6
YMCA	$60/$75	$45/$75	4
Average Resident Cost	***$71***	***$79***	

*Safe Splash Swim School

8.1.2 PRIVATE SWIM LESSON PRICING

Below is a list of the costs associated with private swim lessons. Not all agencies sell private swim lessons in the same size packages. Package size ranges from five to eight sessions. Westerville offers a discount rate for residents. The average cost per private lesson is $26. Average amount is rounded to the nearest dollar.

Private Swim Lesson Rates		
Agency	**Lesson Rate R/NR**	Average Resident Rate per Lesson
Aquatic Adventures	$141 for 4	$33.75
OSU	$150 for 5	$30
Prairie Township	$115/$138 for 5	$23
Westerville Comm. Ctr.	$130/$145 for 8	$16.25
YMCA	$149 for 6	$24.83
Average Resident Rate:	***$137***	***$26***

8.1.3 COLUMBUS AQUATICS CENTER PRICING

While there is no fee for residents to use the community centers of the City of Columbus Recreation and Parks Department, there is a charge for residents to use the Columbus Aquatics Center. Below is a list of membership pricing for the Columbus Aquatics Center.

Columbus Aquatics Center Membership Pricing	
Membership Type	**Rate**
Daily Admission	$1
Annual Membership-Under 50	$25
Annual Membership-50+	$15
Annual Membership- Family of 4	$60

8.1.4 WORTHINGTON NATATORIUM PRICING

The Worthington Natatorium is available for daily use for individuals who are not members of the Worthington Community Center. Below is a list of the daily admission rates for the Worthington Natatorium.

Worthington Natatorium Admission Pricing	
Admission Type	Cost
Adult	$8
Child (3-17)	$5
Military	$5
Senior	$6

8.1.5 DUBLIN AQUATIC RENTAL RATES

The Dublin Community Recreation Center does offer the ability to rent out the aquatic center on Saturday evenings only from 8:15-10:15 pm. Residents receive a discount on rental rates. Below is a list of the different rental types and rates at the Dublin Community Center.

Dublin Recreation Center Aquatic Rental Rates	
Rental Type	Rate R/NR
Leisure Pool	$275/$410
Leisure Pool w/ Slide	$300/$450
Lap Pool	$275/$410
Lap Pool & Leisure Pool	$400/$600
Lap Pool & Leisure Pool w/ Slide	$425/$635
Leisure Pool & Diving Boards	$300/$450
Leisure Pool, Slid & Diving Boards	$350/$525

* Saturday from 8:15-10:15 pm

8.1.6 AQUATIC ADVENTURES RENTAL RATES

Aquatic Adventures allows the public to rent out the entire facility, or any number of their six lap lanes. There is a price reduction per hour per lane if four or more lanes are rented.

Aquatic Adventures	
Aquatic Rental Rates	
Rental Type	**Rate**
Facility- 2 Hours	$250
Additional 30 Minutes	$100
1-3 Lanes	$25/Hour per Lane
4-6 Lanes	$20/Hour per Lane

8.1.7 AQUATIC ADVENTURES MEMBERSHIP RATES

Aquatic Adventures offers day passes, as well as a twenty-five-punch pass and monthly memberships. There are no contracts, and all memberships are month-to-month. Aquatic Adventures offers a discounted membership rate for individuals under the age of fourteen.

Aquatic Adventures	
Membership Pricing	
Membership Type	**Rate**
Day Pass	$10
25-Visit Punch Pass	$115
Individual Monthly (14 and Over)	$40
Individual Monthly (Under 14)	$25

9.1 SENIOR ACTIVITIES AND SENIOR CENTER PRICING

9.1.1 PROGRAM OFFERINGS FOR SENIORS

The following table is a comparison of the senior recreation activity offerings by each full-service provider. Offerings examined include yoga/stretch classes, strength focused senior fitness classes, aquatic fitness classes, open gym pickleball, pickleball leagues, senior tennis leagues, and golf.

Recreation Program Offerings for Seniors	Yoga/Stretch Group Classes	Strength Focused Group Classes	Aquatic Fitness Classes	Pickleball Open Gym	Pickleball League	Senior Tennis	Golf
Columbus Rec. & Parks Dept.	X	X	X	X			X
Dublin P&R	X	X		X			X
LA Fitness	X	X	X				
Life Time Fitness (Dublin & Easton)	X	X	X				
McConnell Heart Health Center	X	X	X				
Prairie Township	X	X	X	X			
Premier at Sawmill Athletic Club	X		X	X	X		
Ohio State Health & Fitness Center	X		X				
Westerville P&R	X	X	X		X	X	
Worthington P&R	X	X	X	X			
YMCA	X	X	X	X	X		

9.1.2 SENIOR CENTER MEMBERSHIP PRICING

The following table is a comparison of the annual membership rates for each senior center. Only Westerville has different rates for residents and nonresidents.

Senior Center Membership Rates	
Agency	Annual Rate R/NR
Columbus R&P	$40
Dublin P&R	$15
Prairie Township	$15/$25
Westerville P&R	$24/$42
Average Resident Rate:	***$24***

10.1 SUMMARY OF SERVICE PROVIDER ASSESSMENT FINDINGS

Based on findings from the service provider assessment, overall, the recreation market surrounding Upper Arlington is rather diverse, but currently lacks some recreation activities.

10.1.1 INDOOR RECREATION PROVIDERS

- 23 Full-Service Provider Locations within the service area
- 116 additional limited-service fitness providers within the service area
- 26 facilities that offer indoor sport courts to the general public
- 20 facilities that offer indoor lap swimming
- 8 facilities that offer a leisure pool

10.1.2 INDOOR RECREATION DEFICIENCIES

- Only 4 facilities have either indoor diving boards or water play features
- Only 3 facilities offer both diving boards and water play features

10.1.3 FITNESS PRICING

- Average Single Monthly Membership Rate for residents is $46/ Month
- Average Joint Monthly Membership Rate for residents is $73/ Month
- Average Family Monthly Membership Rate for residents is $98/ Month

Similar Provider Square Foot Per Capita

Jurisdiction	Population	Facility Square Feet	sq. ft. Per Capita
Worthington, OH	14,725	72,000	4.889643463
Westerville, OH	40,387	140,766	3.485428479
Dublin, OH	48,647	110,000	2.26118774
Reynoldsburg, OH	38,391	70,000	1.823344013
Upper Arlington OH (proposed)	35,912	95,300	2.653709067