



## Memo

To: Kimberly Armitage, YMCA Executive Director - Aurora Branch  
From: Bruce Martin  
Date: October 17, 2018  
RE: Aurora Wheatlands YMCA Facility

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### Scope

King & Associates, Inc. completed an analysis of demographics, demand and competition in May 2016 and May 2018 involving the proposed YMCA facility in Aurora (Wheatlands). Kimberly Armitage has learned that the City of Aurora has taken initial steps to fund a recreation facility to be located on the former Lowry Range (Lowry Bombing and Gunnery Range), located east of Aurora Reservoir. At this time, details involving type of facility, size, cost and construction timing have yet to be fully determined by the City of Aurora. Ms. Armitage has asked King & Associates, Inc. to briefly review prior work and assess potential impact the City's proposed recreation facility may have on the YMCA facility to be constructed in the Wheatlands master planned community in the City of Aurora.

### Competitive projects

In May 2018 competitive projects near the proposed Wheatlands YMCA facility were assessed. The competitive fitness centers that were evaluated involved for-profit, commercial facilities. There were 10 fitness centers located within a 5-mile radius of the proposed YMCA Wheatlands facility and 16 additional fitness centers just outside the 5-mile trade area boundary. These centers offer a range of differing equipment and fitness programs. In review of competitive facilities from 2016 to 2018, the number of fitness centers in the trade area increased from 5 to 10 facilities. However, 5 of these facilities focus on concept or theme based programs (kick boxing, indoor cycling, cross fit) rather than full-service fitness centers.

### Fitness Center Demand

In May 2016, demographic growth in the trade area suggested demand of approximately 5 to 9 fitness centers from 2015 through 2020. This equals demand of approximately 1 to 2 fitness centers per year. The demand forecast was based on a 21% per-capita fitness center demand rate (using national statistics for fitness center utilization in Colorado). The demand forecast assumed both unmet demand (under utilization) and new demand (population growth). With continued strong population growth forecast during the next several years, ongoing demand ranging from 1 to 2 fitness centers per year is expected in the trade area.

### Evaluation of the City of Aurora Recreation Facility

The City of Aurora has allocated initial funds for a recreation facility near the proposed YMCA Wheatlands facility. However, there are many unknown factors involving the City's proposed facility including: exact location, type of facility (recreation center, ice rink, etc.), size, cost and



construction timing. Because of this, it is difficult to assess potential impacts from a City of Aurora facility. The YMCA's Wheatlands recreation center should be completed and at full membership levels before completion of the City's facility. Further, with continued population growth forecast in the south Aurora area, there should be adequate demand for both recreation facilities. The YMCA Wheatlands facility should not be negatively effected by the City's proposed facility