

## ENVIRONMENTAL SCAN – RECREATION PROGRAMS

### I. Demographic Environment

Recreation programs continue to serve a need of residents of the community. Unlike specialty facilities attracting non-resident users, recreational programs rely primarily on residents to fill program requirements. The divide among the three areas of Hoffman Estates continue to be a challenge in providing programs to attract residents to other areas within the community. A sample of 3,717 participants registered in a few of the larger programs shows that 9 out of 10 participants are residents.

- a. Preschool – 91% Residents; 9% Non-Resident
- b. Full Day Camps – 88% Residents; 12% Non-Resident
- c. Youth Athletic Leagues – 90% Residents; 10% Non-Resident
- d. Dance – 90% Residents; 10 % Non-Resident
- e. Gymnastics – 92% Residents; 8% Non-Resident

### II. Socio-Cultural Environment

- a. Asian and Indian populations are very active in the preschool and early childhood programs.
- b. The Latin population is not currently active in the program opportunities available. Many groups are organizing their own soccer programs affiliated with churches or other organizations. These user groups prefer to rent available fields and organize their own leagues.
- c. The Indian population is actively seeking space for Cricket games, practices and other related programs. This is currently a challenge due to the size of the space needed and the need to use weekends currently scheduled with baseball and soccer programs. Surrounding communities, including Hanover Park, Glendale Heights and South Barrington currently provide space for cricket.

### III. Competitive Environment

#### a. Preschool

There are a number of competitors in the immediate area. Many of these organizations provide full day programs intended to provide child care opportunities to working families.

1. Kinder Care – Privately owned business chain, licensed by DCFS day care and preschool facility. Location throughout the area. Not all sites are NAEYC accredited. Full day child care.
2. Tutor Time – Privately owned business chain, licensed by DCFS day care and preschool facility. Location throughout the area. Not NAEYC accredited. Full day child care.
3. Harper College – Community College, licensed by DCFS and NAEYC accredited. Half day and full day child care options that are offered to Harper staff and students and community. Program is designed as a teacher prep/observation program.
4. Churches – Most are licensed, but not all by DCFS or accredited. Faith based teachings added into curriculum.

5. School District 54 & 15 –Five day half-day early intervention preschool taught by certified teachers who are full time with full benefits. Children must be screened for at-risk qualifications before they are accepted.
6. YMCA – Schaumburg & Palatine - licensed by DCFS, but not NAEYC accredited. Half day and full day child care options.
7. Park Districts – most park districts are not licensed and only the Schaumburg Park District is NAEYC accredited in the immediate area.

Only 8% of all preschool programs are accredited in the United States. The park district currently offers half day program at Triphahn and Willow and a full day program at Triphahn. Enrichment classes are offered to the morning preschool children which allow them to stay at school for an extra hour. Weekly music and yoga lessons and weekly swim lessons (summer only) are provided in the full day program. Children in the full day program may also enroll in any classes at Triphahn Center and their teachers will walk them to their additional classes. Both programs also attend field trips once a month around the community using the park district busses. These benefits are not available at most child care centers and preschools.

b. Full Day Camps

As with full day preschool, camp opportunities provide families with day care options and many organizations provide a number of opportunities based on facilities.

1. YMCA – Campanelli, Schaumburg and Buehler, Palatine – multiple options for families to select. Similar activities as HEPD. Offer extended hours for working families.
2. Boy & Girl Scouts – camps are focused on core skills developed by organization and include overnight retreats.
3. Day Care Providers – programs are an extension of school year programs. Preschool age programs provide the children with year round preschool daily. Child care for younger children prior to graduating from the program. Children move to other listed options once in school full time.
4. Lifetime Fitness Camps – Multiple options within one facility. All activities are housed at one site. Do not offer extended stay options.
5. In-Zone – Harper College – Multiple facilities at one location and do not leave site for activities. More educational options and half day options. Families can choose to send their children to two half day camps per day.
6. Training Camps – Athletics and Arts – offered within HEPD programs and multiple other private organizations. Specialized camps for selected activity. Do not offer extended stay.
7. One week specialty camps (over night camps) – private organizations offer 1-4 week camps and provide number of unique opportunities, including boating/sailing, horse back riding, etc. Most are extremely expensive.
8. Religious Youth Camps/Retreats – Willow Creek & Holy Family – faith based programs.

9. Park Districts – offer similar programs based on the resources within each agency. Area park districts also utilize local schools as host sites and bus the campers to water parks and other field trips each week to compliment their activities.

HEPD compares to most organizations in the variety of programs offered and activities participants can enroll in. However, HEPD offers one week sessions to maximize the opportunities for parents and campers to have a number of experiences over the summer.

c. Youth Athletic Leagues

There are a number of factors contributing to the number of participants in youth athletic programs and leagues. Travel teams are more prevalent than ever before. Teams are formed for each sport by agencies and organizations and also independent teams are formed each year not affiliated with agencies or organizations, rather teams formed as individuals and rent fields and space available in surrounding communities. With the popularity of travel teams, children are forced to specialize at an earlier age and most children are forced to choose a sport due to the commitment of playing travel sports.

1. Travel Teams – program/teams developed to increase the training and number of games and practices for each sport.
2. YMCA – recreational programs for children of any ability.
3. Parent Associations – volunteer organizations are the most prevalent provider of youth athletic programs. The man power is much greater than an agency managed program.
4. Park District – vary in program offerings. Some offer recreational leagues, a few offer travel programs. Most agencies work with community organized parent associations as affiliate groups.
5. Grand Sports Arena run located in Hoffman Estates run both outdoor and indoor youth soccer leagues.
6. Other non-athletic programs
7. HEPD Hockey program. Many of the in-house athletes are trying hockey which continues to grow in our area.

HEPD offers a variety of recreational and travel leagues for baseball, softball, basketball, soccer, lacrosse, and volleyball. The programs provide quality opportunities to learn the basic fundamentals in a safe and fun environment. The park district also has the extension of the recreational programs and provides the more serious participants with travel programs to further develop their skills. Two major factors that create the biggest challenges are the number of high school/school district Hoffman Estates serves and that programs cannot be centrally located to accommodate all areas within the community.

d. Youth Athletic Specialty Camps

Camps and clinics are offered throughout the year for a variety of sports; skill and sport specific. There are a number of opportunities available for companies or

organizations to offer these at park district facilities. However, some of the companies will not work with the parameters set up regarding contractual programs and revenue sharing. Also, most specialty camps are only half day and do not provide working families with the opportunity of extended care options. Staff continues to look for opportunities to offer these camps and clinics without offering to many competing programs within the park district.

1. Bulls and White Sox Camps, other pro and semi-pro teams – sport specific programs offered throughout the suburbs in cooperation with other public and private organizations.
2. YMCA –Schaumburg and Palatine
3. High Schools
4. Travel Teams
5. Lifetime Fitness Camps
6. Harper College
7. Park Districts

HEPD currently works with the local high schools and other private businesses to offer a variety of camps including volleyball, soccer, softball, basketball, lacrosse and baseball camps throughout the summer.

e. Senior Programs

There are a number of established agencies and organizations offering programs within the immediate area. The ongoing challenge is providing non-competing programs and services within the fee structure offered by other similar entities. Staff continues to look for partners when offering special opportunities to minimize competition and subsidize the cost of programs and services. Most organizations have a designated coordinator for this area whose sole responsibility is providing for the senior population within their agency.

1. Village of Hoffman Estates
2. Schaumburg Township
3. Hanover Township
4. Palatine Township
5. Schaumburg Park District
6. Harper College

HEPD continues to look for the opportunities to partner with the listed organizations to offer cooperative programs, events and trips. In 2013 St. Alexis closed down their senior group, the Golden Circle. HEPD received the database for these members. HEPD has also partnered with Harper College to offer classes within our building as a satellite site.

IV. Economic Environment

As the park district continues to explore new program and service opportunities the slumping economy has forced many families to adjust spending and in some instances force both parents to work or pick up additional hours or jobs.

a. STAR – Before and After School Program

This program affords working parents the opportunity to enroll their children into before and after school child care. STAR locations are WRC, Armstrong, Fairview, Lakeview, Lincoln Prairie, MacArthur & Muir. We also offer 2 Kindergarten STAR Programs, for those children that get out of school mid-day, one at WRC and one at the Triphann Center. The Triphahn Center Kinder STAR is DCFS licensed. Since acquiring the all the district 54 schools in Hoffman Estates, we were able to tripled the amount of children in the program and continue to see an increase in full day camps as a result of being able to provide year round programs and services to working families between the hours of 7:00 AM and 6:00 PM

We also offer full day programs/trips during all institute and in-service days off for both district 15 and 54, to provide continued care for the community.

b. Full Day Preschool

Staff is currently researching the possibilities of expanding the current half day preschool program. The park district currently operates a high quality, nationally recognized half day preschool program, but is unable to compete with other local entities that can offer full day programs. The possibility of offering such a program would benefit the community and provide numerous possibilities to the park district and its residents.

V. Technological Environment

a. Website is becoming more useful for participants and families. Continuing to add important program information and forms for programs and services allows participants to complete necessary paperwork prior to registration and assists in FAQ's.

b. Continue to manage and develop customer database. Electronic surveys are an efficient and economical means to collecting valuable feedback.

## **ENVIRONMENTAL SCAN OVERVIEW**

The environmental scan provides impactful components for each area as it relates to the operations of each facility within the department. These areas of interest are a direct result of the Facilities Department team's independent research as it relates to the target demographics, social-cultural, competitive, economic and technical environments. Other components relating to the Facility Department direction include; analyzing major industry/membership trends, fiscal realities and community perspective/input. This report is broken down into two facets of study, Triphahn Community Center & Ice Arena (TC) and Willow Recreation Center (WRC) and then a specific environmental scan for Prairie Stone™ Sports & Wellness Center (PSS&WC).

### **Triphahn Center & Ice Arena and Willow Recreation Center**

#### **I. Demographic Environment**

As it relates to the various facilities throughout the district the following information provides the back drop to the targeted demographic for that specific facility.

The Community Center/Ice Arena and Willow Recreation Center have resident usage of close to 90%. Thus the direct target demographic opportunity is provided within the Hoffman Estates community boundaries. Within the areas of rentals that market is expanded due to the request from non-resident users, i.e. travel teams, dance organizations, scout groups, within the surrounding adjacent communities.

#### **II. Direct demographic environment**

- a. The population of Hoffman Estates is 52,520, other communities served on a lower percentage are; Schaumburg, Elgin, South Barrington, Barrington, Palatine, Hanover Park, Streamwood, Bartlett, East Dundee, West Dundee, Barrington Hills and Inverness.
- b. The median age for residents in Hoffman Estates, IL is 33.6 (this is younger than average age in the U.S.).
- c. Families represent 74.7% of the population, giving Hoffman Estates a higher than average concentration of families.
- d. The average annual household income is \$65,937.

#### **III. Socio-cultural Environment**

- a. While 68.3% of the population is White, the Asian population is growing in the area with 15.1%.
- b. Hispanic or Latino is the next highest group capturing 10.5% of the population and the Black population comes in at 4.4%.
- c. The Indian population is also growing a rapid rate as well within the area of Hoffman Estates, specifically on the west end of community. This population has a higher rate of participation at PSS&WC. This population utilizes rental opportunities at the CCIA and WRC for various celebrations and special events.

#### **IV. Competitive Environment**

The operations at the two facilities as it relates to the Facilities Department can be broken down into various specific independent facets of services, but the main focus within this environmental scan relates to three components of operations, fitness center membership, fitness programming and rentals. With these three components in mind the majority of membership and programming as listed above, (90%) comes from within the Hoffman Estates community. The major drive for the two fitness centers as well as fitness programming comes from proximity to member/resident household. The International Health, Racquet and Sports club Association (IHRSA) reports that based on this facility price points for membership and fitness programming convenience/location to the household becomes the major asset in participation. As well the community relations component and comfort level with these types of centers presents a positive environment for exercise/participation.

#### **Triphahn Community Center & Ice Arena and Willow Recreation Center Competitive Environment**

##### **Community Recreation Center, (CRC) Park District, Schaumburg IL**

###### ***Facility Amenities***

Cybex, Precor & Life Fitness equipment, air dyne bikes, exercise bikes, elliptical machines, Stairmasters, 2 New-Step Recumbent Cross trainers, 2 Adaptive Motion Trainers, one gymnasium, indoor running track, three racquetball courts, treadmills, rowing machines, two saunas, whirlpool and free weights.

###### ***Services***

Equipment assessments, personal training, nursery services, open gym, massage, group exercise classes and room rentals, birthday parties.

###### ***Hours of Operation***

Monday through Friday 5:30a – 11p    Childcare: 8:30am – 12pm, 5pm – 8:30pm

Saturday and Sunday 6a – 10p        Childcare: 9:00am – 12pm

###### ***Membership Fees (Annual)***

|  |             |                |              |
|--|-------------|----------------|--------------|
| Resident Fitness Annual Dues           | Adult \$194 | Family \$269   | Senior \$111 |
| Non-Resident Fitness Annual Dues       | Adult \$297 | Family \$409   | Senior \$164 |
| Childcare hourly (1/2 hour increments) |             | \$2/hour/child |              |

###### ***Summary***

This facility is very similar to the TC center, the amenities and services are comparable, and because of the proximity to the TC center it does create a strong competitive base, especially within the senior market.

##### **Xsport – Full Service Schaumburg IL**

###### ***Facility Amenities***

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment and child's play area. Facility includes basketball court, 4 lane lap pool, 2 Group Exercise studios, XIT Interval Training studio, whirlpool, and sauna.

###### ***Services***

Personal training, nutrition, pro shop and supplement line. Massage, hair care salon, skin care, and air brush tan available. Facility includes Café and internet café. Complimentary lockers, towels, and free Personal Training session provided. Members can watch children in play area on closed-circuit TV.

**Hours of Operation**

24 hours

**Membership Fees**

Individual Monthly Dues of \$39 with no initiation or enrollment fee. Family Monthly Dues are \$33.50 each member. Child care costs for children 6 months to 12 years old are \$1 per hour or \$20 per month unlimited.

**Summary**

Very aggressive sales/gorilla marketing mind set, personal trainers must sell packages on the fitness floor to be compensated. The target market for this type of club attracts the under 35 year old participant. Hours of operations allow for convenient use. Low cost childcare available with ability to watch children while working out.

**Blast! Fitness – Park District, Schaumburg IL**

**Facility Amenities**

Cardio equipment, tanning, Group Exercise, free weights, selectorized weight machines, and saunas.

**Services**

Group exercise, free babysitting, free locker use, free guests each visit, and woman’s only area.

**Hours of Operation**

Monday-Friday 5:00am-12:00 midnight

Saturday & Sunday 7:00am-7:00pm

**Membership Fees**

| <b>Type</b>         | <b>Cost per month</b> | <b>Starting Fee</b> |
|---------------------|-----------------------|---------------------|
| Individual Gold     | \$10/month            | \$1                 |
| Individual Platinum | \$20/month            | \$1                 |

Individual Gold includes equipment and locker usage. Individual Platinum includes group exercise classes, spin classes, baby- sitting, and equipment and locker usage.

**Summary**

This center is a very low cost, family oriented facility with sauna, locker rooms, a woman’s only area, and child care. Multi access allows the use of nationwide facilities at no additional cost.

V. **Economic Environment**

The economy has affected all operations as they relate to the facilities department; team members have seen a decrease in rental and membership opportunities within the last year. In regards to rentals some of the traveling clubs have disbanded thus the need for additional rental opportunities has dropped off slightly as well the membership at both facilities continues to grow, but the opportunity is not as vast as in previous years. The positive point for CCIA and WRC in regards to membership is the new automatic monthly billing program. This has provided the membership base with a monthly price point that has allowed members to pay their dues on a monthly basis as opposed to an annual program. This new service has allowed for good growth in membership at both facilities. The price point at each of these facilities allows individuals to utilize a health club on a basic level which serves a community need. Whereas PSS&WC has more sensitivities with price points and is more affected by economic constraints.



## VI. **Technology Environment**

### **REACH TV**

REACH TV is a low-cost video graphics system for television information displays. It is very easy to use and displays a variety of graphic and text information. Currently this service provides the opportunity to sell guest service type opportunities within the HEPD facility lobbies.

### **Email Blasts**

Currently Facility Department works with the Communication & Marketing department through the Constant Contact program to conduct target specific email marketing campaigns. Constant Contact is a user-friendly program and allows email blasts sent out with ease.

## **Prairie Stone™ Sports & Wellness Center**

### I. **Demographic Environment**

The primary target market that this facility has been focused on in the past years has been the Prairie Stone Corporate Park as well as residents and corporations located within a 20 minute or less drive time to the facility. International Health, Racquet and Sports club Association (IHRSA) reports the industry standards to be a 12 minute or less drive time, but based on PSS&WC location to potential households it is critical to attract a larger market area and/or quadrant. The most successful campaigns come from households with men and women with the predominantly between the ages of 30-64 with annual total household incomes of \$75,000 or greater. With the increase in development within the less than 12 minute drive radius team members are continuing to monitor the success of these targeted campaigns as well. The challenge with some of the new developments within this market is a majority of these homes are still for sale and currently do not have residents living within them. Another challenge PSS&WC has faced since its inception is the transient resident, with a heavily focused corporate market one of the highest reasons for discontinuing membership at PSS&WC is relocation (moving out of the area).

### II. **Socio-cultural Environment**

While 68.7% of the population is White, the Asian population is growing in the area with 11.3%. Within this 20 minute drive time area, because of the bordering communities and the location of PSS&WC to these communities, the Hispanic or Latino is the next highest group capturing 10.8% of the population and the Black population comes in at 4.1%. Finally the Indian population 5.1% is also growing a rapid rate within the area of west Hoffman Estates. This population has a higher rate of participation at PSS&WC then compared to the other HEPD facilities.

### III. **Competitive Environment**

This particular component has many facets of consideration as it relates to the operations at PSS&WC. Because of the expanded target market for potential membership, which is larger than the industry standard 12 minute drive time radius; the increase in competition becomes that much greater. PSS&WC competes with the clubs as listed above (which you will see below), but the specific rate of competition not only varies based on that competitor's specific location to PSS&WC but also the specific target market that competing club attracts. With the influx of

economic constraints within the past year(s), many of the potential membership clientele are really asking the question to what level of health and wellness experience are they looking to obtain. The primary competition continues to be the big four that are located just within the 12 minute drive time those are; Lifetime Fitness in Schaumburg, Lifetime Fitness in Algonquin and LA Fitness in Hanover Park & West Dundee. Xsport Express center in the Arboretum Mall in South Barrington is a primary competitor as well.

## **Prairie Stone™ Sports & Wellness Center – Competition Environment**

### **LifeTime Fitness – Private Club Nationwide Chain, Schaumburg IL**

#### ***Facility Amenities***

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment, climbing wall, spinning studio, aerobic dance room, day spa, hair salon, indoor aquatic center, outdoor aquatic center, large gymnasium, café and child's play area.

#### ***Services***

Nationwide membership program, personal training, nutrition, climbing lessons, youth programming, aquatic learn to swim program, aerobics, water aerobics, spinning, yoga, Pilates, lifestyle magazine, towel service, valet parking, day spa services and hair care.

#### ***Hours of Operation***

24 hours

#### ***Membership Fees***

Individual Monthly Dues                      range from \$69 per month

Family Monthly Dues                         range from \$119 per month

Single Enrollment Fee: \$229

Additional fee associated with child care: \$20 per month (2 hours per day max)

(These fees depend on level of membership)

#### ***Summary***

This national club corporation has really established itself as a nationwide leader since the down turn in the early 1990's and late 1980's of Bally Total Fitness. This type of club not only competes' with PSS&WC but the park district as a whole. They were able to jump on a target market that was under served nationally and capitalize on this opportunity. A family focused facility, that caters well to all age groups up to age 55, they are the leading force in private clubs nationally, as well a publicly traded company on the stock market.

### **XSport – Express, Private Store Front Club, South Barrington IL**

#### ***Facility Amenities***

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment and child's play area.

#### ***Services***

Chicagoland/area membership program, Personal training, nutrition, pro shop and supplement line.

#### ***Hours of Operation***

24 hours

#### ***Membership Fees***

Starting at; Individual Monthly Dues of \$19.95 with a \$99 initiation fee

(Individual dues: \$40/month with regional pass)  
(Child care included within monthly fee)

**Summary**

Very aggressive sales/gorilla marketing mind set, personal trainers must sell packages on the fitness floor to be compensated. The target market for this type of club attracts the under 35 year old participant. Hours of operations allow for convenient use. Because of its location in regards to PSS&WC the level of competition has yet to be determined but team members believe with the economic downturn and sensitivity to price point shopping the potential level of competition could be high.

**LifeTime Fitness – Private Club Nationwide Chain, Algonquin IL**

**Facility Amenities**

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment, climbing wall, spinning studio, aerobic dance room, day spa, hair salon, indoor aquatic center, outdoor aquatic center, large gymnasium, café and child's play area.

**Services**

Nationwide membership program, personal training, nutrition, climbing lessons, youth programming, aquatic learn to swim program, aerobics, water aerobics, spinning, yoga, Pilates, lifestyle magazine, towel service, valet parking, day spa services and hair care.

**Hours of Operation**

24 hours

**Membership Fees**

Individual Monthly Dues            range from \$69 per month  
Family Monthly Dues            range from \$119 per month  
Single Enrollment Fee: \$229

Additional fee associated with child care: \$20 per month (2 hours per day max)  
(These fees depend on level of membership)

**Summary**

This facility mirrors the Schaumburg facility, as stated above in the summary of LifeTime Schaumburg; this facility creates the greatest competition for PSS&WC. The advantage for PSS&WC and the clientele west of the Fox River is PSS&WC creates a nice opportunity to workout while allowing traffic to defuse prior to heading home. Getting across the river has limited access thus creating time sensitivities for potential membership clientele at this LifeTime Fitness site.

**LA Fitness – Private Club Nationwide Chain – Hanover Park, IL**

**Facility Amenities**

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment, spinning studio, aerobic dance room, indoor pool including a 25 meter 4 lane lap pool , café and child's play area.

**Services**

Nationwide membership program, personal training, nutrition, aerobics, water aerobics, spinning, yoga, Pilates, lifestyle magazine and towel service.

**Hours of Operation**

Monday – Thursday 5:00am - 11:00pm  
Friday 5:00a – 10:00p

Saturday – Sunday 7:00a – 8:00p

Childcare Hours of Operation

Monday – Friday 8:00am -12:00pm and 4:00pm – 8:00pm

Saturday 8:00am – 12:00 pm

**Membership Fees**

Individual Monthly Dues           \$29.95 per month - \$99 initiation fee

Childcare                               \$10 per month – per child

**Summary**

The facility would be considered a second tier type competition, because of the location and limited amenities as well as hours of operation.

**LA Fitness – Private Club Nationwide Chain – West Dundee, IL**

**Facility Amenities**

Cardiovascular equipment with Cardio theater individualized screens, selectorized/strength training pieces LifeFitness, Flex, Icarian, Hammer Strength, Precor and Iron Grip free weight equipment, spinning studio, aerobic dance room, indoor pool including a 25 meter 4 lane lap pool , café and child's play area.

**Services**

Nationwide membership program, personal training, nutrition, aerobics, water aerobics, spinning, yoga, Pilates, lifestyle magazine and towel service.

**Hours of Operation**

Monday – Thursday 5:00am - 11:00pm

Friday 5:00a – 10:00p

Saturday – Sunday 7:00a – 8:00p

Childcare Hours of Operation

Monday – Friday 8:00am -12:00pm and 4:00pm – 8:00pm

Saturday 8:00am – 12:00 pm

**Membership Fees**

Individual Monthly Dues           \$29.95 per month - \$99 initiation fee

Childcare                               \$10 per month – per child

**Summary**

The facility would be considered a second tier type competition, because of the location and limited amenities as well as hours of operation.

**The Elgin Centre – Village owned facility, Elgin IL**

**Facility Amenities**

Hospital rehabilitation space, field house, general locker rooms, lap pool, therapy pool, aquatic center, preschool space, babysitting, conference rooms, banquet hall, climbing wall, ceramics room, party rooms, indoor track, adult locker rooms, pedestrian walk way to parking garage, aerobic studio, spinning room, cardiovascular and strength training equipment, free weights, massage therapy and racquetball courts, small gym, broadcast vision.

**Services**

Aerobics, water aerobics, personal training, climbing classes, youth and adult classes, swim team, aquatic lessons, nutrition, massage services, towel service, fitness assessments, basketball leagues, community programs, injury assessments through Sherman hospital partnership.

**Hours of Operation**

Monday – Friday - 5:00 a.m. – 9:00 p.m.

Saturday - 7:00 a.m. - 5:00 p.m.

Sunday - 8:00 a.m. - 5:00 p.m.

**Membership Fees**

Individual Monthly Dues        \$29 per month  
Couples Monthly Dues        \$45 per month  
(Annual membership, no enrollment fee)

**Summary**

This facility competes more with the park district as a whole in regards to recreational services, but because PSS&WC draws a large clientele from the north side of Elgin it has affected the potential growth of PSS&WC membership base. This facility is geared more towards a general recreational center, with a small fitness component. This facility would be considered a second or third tier competitor for PSS&WC.

**South Barrington Club – Park District, South Barrington IL**

**Facility Amenities**

6 indoor tennis courts, 8 outdoor clay tennis courts, aerobic studio, cardiovascular equipment, Cybex selectorized pieces, free weights, FitStart 4 Kids, indoor pool, outdoor aquatic center, indoor track, Pilates studio, men’s and women’s saunas, indoor and outdoor basketball courts, pro shop and nursery.

**Services**

Group and private tennis lessons, aerobic classes, personal training, swimming lessons, spinning, yoga, Pilates, massage therapy, café, towels and banquet facilities.

**Hours of Operation**

Monday-Friday 5:00am-10:00pm  
Saturday & Sunday 7:00am-9:00pm

**Membership Fees**

**Resident**

| Type         | Initiation | Executive Mem. | Mem.     |
|--------------|------------|----------------|----------|
| Individual   | \$100      | \$ 72.50       | \$ 61.50 |
| Dual         | \$150      | \$107.00       | \$ 91.50 |
| Family       | \$200      | \$128.50       | \$107.00 |
| Extd. Family | \$200      | \$165.00       | \$144.00 |
| Junior       | \$75       | \$ 51.00       | \$ 44.50 |
| Senior       | \$80       | \$ 58.00       | \$ 50.50 |
| Senior Dual  | \$120      | \$ 85.50       | \$ 76.00 |

**Non-Resident**

| Type         | Initiation | Executive Mem. | Mem.     |
|--------------|------------|----------------|----------|
| Individual   | \$200      | \$ 79.00       | \$ 66.50 |
| Dual         | \$325      | \$121.00       | \$107.00 |
| Family       | \$400      | \$144.00       | \$122.00 |
| Extd. Family | \$400      | \$179.50       | \$155.00 |
| Junior       | \$150      | \$57.50        | \$ 50.00 |
| Senior       | \$160      | \$63.50        | \$ 54.50 |
| Senior Dual  | \$260      | \$96.00        | \$ 85.50 |

**Summary**

This center is primarily a tennis focused facility, but because of its location specifically to north Hoffman Estates where PSS&WC draws a large membership base, this facility creates a second tier competition level for PSS&WC. Because the facility does not have the same amenities or services as PSS&WC the impact is minimal.

## **Heroic Fitness, Hoffman Estates**

### ***Facility Amenities***

Private studio including personal training, cardiovascular training, spinning room, and member locker rooms

### ***Services:***

One-on-one training, semi-private training, Group training, Fitness classes: Zumba, Sculpt, Street Vybe, Cardio Kickboxing, Piloxing, Mind Cycle, and fusion classes with a mix of spinning and strength workouts, mind and movement classes

### ***Hours of Operation***

Monday – Friday: 6:00am – 9:00pm

Saturday: 6:00am – 3:00pm

Sunday: By appointment only

### ***Membership Fees:***

Membership fees are based upon personal training sessions and group classes. Pricing is based on 3 different Tiers of membership with different time frames of commitment including no commitment, 3 months commitment and 6 month commitment. By purchasing personal training sessions, participation within group classes is also permitted.

| <b>Type</b> | <b>No Commitment</b> | <b>3 month Commit</b> | <b>6 month commit</b> |
|-------------|----------------------|-----------------------|-----------------------|
| Tier 1a     | N/A                  | \$608 / month         | \$568 / month         |
| Tier 1b     | N/A                  | \$828 / month         | \$768 / month         |
| Tier 2a     | \$179 / month        | \$159 / month         | N/A                   |
| Tier 2b     | \$149 / month        | \$125 / month         | N/A                   |
| Tier 3a     | \$ 89 / month        | \$ 69 / month         | N/A                   |
| Tier 3b     | \$ 69 / month        | \$ 49 / month         | N/A                   |

Tier 1a includes 8 one on one private personal training sessions per month (2 per week) and full access to all fitness classes available as well as nutrition and body assessment. Tier 1b includes 12 one on one private personal training sessions per month (3 per week) and full access to all fitness classes available.

Tier 2a includes 12 group (4-8 people) personal training sessions per month and access to strength endurance and conditioning. Tier 2b includes 4 group personal training sessions per month and access to boxing and martial arts training.

Tier 3a includes unlimited group fitness access and tier 3 includes unlimited mind body class access. Nutrition counseling is available at an additional cost of \$150 and body assessment for \$50 for Tiers 2 and 3. A grand opening special is in place through the end of April which discounts the first month of dues by \$100 for Tier 1 memberships, and \$25 for Tier 2 and 3 memberships. Drop-in rates for Fitness and Mind & Movement classes are \$17 / session or \$150 / 10 classes.

### ***Summary***

Heroic Fitness specializes in personalized results towards fitness. Purpose driven facility with emphasis upon working with individuals on personal level. Gym currently consists of 60 members. (2014)

#### IV. **Economic Environment**

PSS&WC continues to maintain success in membership growth specifically as it compares to like type facilities in the Chicagoland area. Success in this type of center is maintaining the current membership base or minimal loss in its membership. Because of the price point that PSS&WC sets, which is consistent if not low for the amenities and services that it has to offer, the sensitivity to cost becomes a factor with the new potential member who has not experienced the level of service or value that the PSS&WC continues to offer. Potential members are much more adapt to shop the local competition due to cost sensitivities currently being experienced within the community and nation as a whole. The focus for PSS&WC will need to be continued exposure to the current membership base in regards to the value that PSS&WC offers. Another important point to stress is the one stop all inclusive membership where everything is included for one price. A major component will be relationship building (customer service) and cleanliness that will continue to drive this facility, and of course the overall architecture appearance of the facility. PSS&WC has a very strong close ratio as it relates to tours and internal membership sales. Because the member services team utilizes a very specific membership sales technique that has been established over the past 5 years the percentage that join after a tour remains in the 60% - 65% rate which is much higher than the industry standard. Currently that closing rate has dropped slightly due to some of the financial constraints the new potential member may have, as well as the current member who is evaluating their own internal expenses. Success for PSS&WC in this economic hardship will continue to be strong business and marketing plans while continuing to add value back into the membership base.

#### V. **Technology Environment**

##### **Internet**

With much of the PSS&WC potential and current membership base being technologically savvy and utilizing the internet highway to gather information as well as make decisions based on internet presence and site presentation. It will be critical that PSS&WC maintains and continues to improve on various online search engines, i.e. Google, Yahoo, Get Members, etc. with this mind marketing dollars will need to continue to be allocated for this potential membership opportunity stream. The PSS&WC team members continue to see this need and are looking to expand their presence in this market.

##### **Email Campaigns**

Team members continue to utilize Constant Contact for PSS&WC email blasts. The HEPD Communications and Marketing department works closely with the PSS&WC Member Services team to provide this service. This is a very user-friendly program and allows team members to send out email blasts with ease. There are many templates from which to choose to easily create a visually appealing email blast. The PSS&WC Member Services team is currently working with the Vermont Systems the HEPD operating software provider to establish a member retention program in conjunction with Retention Management out on the east coast that provides member retention services for facilities like PSS&WC.

##### **Club Management Software**

Team members continue to evaluate the current club management software to maximize the opportunities to communicate affectively with the current and future

membership base as well as provide additional revenue streams for services like house charging, personal training, nutrition, court bookings, rentals, etc. This continues to be an ongoing initiative as the need to maximize this opportunity continues to be critical in the success of this facility.

## **Conclusion**

Team members continue to establish new resources to enhance the various services offered to the residents and community as a whole. Working with the other departments within the district especially the Recreation department will be critical to find a balance between recreational programs, rentals and membership based services. Nevertheless, identifying, accessing these challenges and taking advantage of data gathered will continue to drive this department's success.



## Trends in the Health & Wellness Industry

1. **High-Intensity Interval Training (HIIT):** HIIT, which involves short bursts of activity followed by a short period of rest or recovery, jumps to the top of this year's list. These exercise programs are usually performed in less than 30 minutes.
2. **Body Weight Training:** This is the first appearance of this trend in the survey. Body weight training uses minimal equipment making it more affordable. Not limited to just push-ups and pull-ups, this trend allows people to get "back to the basics" with fitness.
3. **Educated and Experienced Fitness Professionals.** Given the large number of organizations offering health and fitness certifications, it's important that consumers choose professionals certified through programs that are accredited by the National Commission for Certifying Agencies (NCCA), such as those offered by ACSM.
4. **Strength Training.** Strength training remains a central emphasis for many health clubs. Incorporating strength training is an essential part of a complete physical activity program for all physical activity levels and genders. (The other essential components are aerobic exercise and flexibility.)
5. **Exercise and Weight Loss.** In addition to nutrition, exercise is a key component of a proper weight loss program. Health and fitness professionals who provide weight loss programs are increasingly incorporating regular exercise and caloric restriction for better weight control in their clients.
6. **Personal Training.** More and more students are majoring in kinesiology, which indicates that they are preparing themselves for careers in allied health fields such as personal training. Education, training and proper credentialing for personal trainers have become increasingly important to the health and fitness facilities that employ them.
7. **Fitness Programs for Older Adults.** As the baby boom generation ages into retirement, some of these people have more discretionary money than their younger counterparts. Therefore, many health and fitness professionals are taking the time to create age-appropriate fitness programs to keep older adults healthy and active.
8. **Functional Fitness.** This is a trend toward using strength training to improve balance and ease of daily living. Functional fitness and special fitness programs for older adults are closely related.
9. **Group Personal Training.** In challenging economic times, many personal trainers are offering more group training options. Training two or three people at a time makes economic sense for the trainer and the clients.

10. **Yoga.** Based on ancient tradition, yoga utilizes a series of specific bodily postures practiced for health and relaxation. Includes Power Yoga, Yogalates, Bikram, Ashtanga, Vinyasa, Kripalu, Anurara, Kundalini, Sivananda and others.
11. **Anti-Obesity Campaign: Healthy Weight Loss with Lifestyle Changes for longevity.** Though the trends show a slight reduction (early stages of the results) in childhood obesity the national average for the standard adult is still showing an increase in BMI numbers.
12. **Youth exercise programs for the prevention of obesity.** Many steps have been taken to reduce the national average as it relates to childhood obesity, but the focus now trends towards lifelong healthy activities and nutritional change.
13. **Circuit Training.** This activity was very popular back in the 1980's and early 1990's, as far as station training. The new trend is geared more towards the combined program with both strength and cardiovascular training.
14. **Worksite Health Promotion.** Many companies are seeing the need to utilize preventative health care and fitness/wellness programs that reward team members for participation and positive results/advancements in their health IQ programs.
15. **Life coaching/Wellness Coaching.** Along with personal training the trend of life/wellness coaching focuses on the 3 tear approach of a mind, body and spirit balance.
16. **Technology/mobile applications.** The industry is looking at a variety of ways to connect with members and guests via technology and mobile applications. These include real time registration, online membership sales, coaching, training and applications that track and engage members throughout the day as to their health/wellness progress.

**Sighted Sources:**

American Counsel on Sports Medicine (ACSM)

National Academy of Sports Medicine (NASM)

American Council on Exercise (ACE)

Examiner.com

Center of Disease Control

Gartner.com

## **Best Practices in the Health & Wellness Industry**

Customer service

Facility maintenance

Membership and pass registration (on-line capabilities)

House charges

Guest services

Fitness programming

Technology associated with fitness equipment and fitness facility operations

## **RECREATION DIVISION**

### **TRENDS**

#### **I. PRESCHOOL / CHILD CARE**

- Accreditation literacy more prevalent.
- Educating children at an earlier age than preschool.
- Economy slowly on the rise, increase in need for full day care.
- Among those children not yet enrolled in kindergarten, the percentage of three- to five-year olds enrolled in full-day prekindergarten and preschool programs increased from 21 percent in 1994 to 26 percent in 2012.

#### **II. YOUTH ATHLETICS**

- The percentage of inactive 6-to-12-year-olds—youths involved in no physical activities over a 12-month period—rose to near 20% in 2012 from 16% in 2007, according to the SFIA/Physical Activity Council survey. Inactive 13-to-17-year-olds rose to 19% from 17%.
- Volunteer recruitment continues to be a challenge.
- Families are registering their children in sports according to the districts they will be playing for in high school.
- Year round training, travel teams and club leagues restrict the ability to participate in multiple sports.
- Demand for field rentals continues to increase with independent teams and leagues.
- Travel teams have a higher demand for lighted fields.
- Mini Soccer, games are played on a field 8<sup>th</sup> the size of a full size field, with 5 or 6 players per team.
- Shortened seasons to accommodate busy families, along with 1 day tournaments.
- Old games from left field dodge ball, Pickleball, wiffleball, badminton, kickball, tug of war. These also include backyard picnic themed events.
- Water polo and/or inner tube water polo.

#### **III. SENIOR PROGRAMS**

- As America's senior population grows, park and recreation agencies need to consider new lifestyle and financial factors to best serve this demographic.

- Seniors are looking for a wide variety of program opportunities; social and passive. Including targeted special events, trips and programs.
- Drop in programs are appealing to this demographic.
- Life expectancy is substantially greater today than in the past 60 years.
- Enhanced discretionary income; want to participate in more social environments.
- Enhanced leisure literacy; saturated market for baby boomer activities (social and physical).
- Expanded Pickleball space for indoor and outdoor programming
- Partnerships with outside groups, i.e. The Arthritis Foundation or other local groups, townships, village and park districts for joint programming.
- Continuing education programs, life-long learning opportunities.

#### **IV. SPECIAL EVENTS**

- Family oriented events apply to all demographics, affordable, shorter events, condensed events with multiple activities going on at one time (the 2-3 hour wow event). This would allow for families to commit easier.
- Children Series Concerts appeal to different age groups.
- Our area is saturated with special events, expos and attractions.
- Adding diversity (ethnic based events/rentals) in special events will attract the targeted audience.

#### **V. GENERAL PROGRAMMING**

- Beginner and 101 programs are appealing to adults, allowing participants the opportunity to test the waters with little risk involved.
- Get families active on a low budget.
- Conservation/Nature programs bring children back outside.
- Connect youth to the natural world and provide job skills.

#### **VI. ADULT ATHLETICS**

- Pickleball is one of the fastest growing sports in the country. Estimated 131,000 number of players in the US estimated by USAPA. 39 new pickleball venues coming online each month in U.S. Age among USAPA Members; Age 39 and under 6%, age 40-59 24%; age 60+ 70%.
- Desire to get potential players into a game more quickly, with less equipment and sometimes fewer people required for a game (ex: mini soccer, ultimate Frisbee).

- Adults are taking a trip down memory lane by unwinding with games they remember from childhood or decades past (ex: wiffleball, kickball).
- Challenged events and themed races tend to attract droves of community members who wouldn't normally participate in recreation events or leagues.
- Shortened seasons; cutting back time commitment.
- Ultimate Frisbee an open play activity that does not require referees.

#### **VII. Performing Arts / Creative Arts**

- Photography capturing a lot of interest.
- Theater arts help children develop artistically and socially. Children gain confidence through the arts that touches their lives in many ways both on and off the stage. Between 1991 and 2010, the percentage of eighth-grade students participating in school performing arts declined moderately from 55 to 46 percent. In 2011, the proportion increased to 50 percent. The percentage of tenth- and twelfth-graders participating in school performing arts has neither increased nor decreased significantly during this same period, fluctuating between 36 and 42 percent among tenth-graders, and between 39 and 42 percent among twelfth-graders. Performing arts participation in 2011 was 37 percent among tenth-graders, and 39 percent among twelfth-graders. Performing arts declined moderately from 55 to 46 percent.
- Creative play programs, nature based supplies allowing for interpretation and exploration.
- Partnering with local arts and crafts groups
- Establish an agreement for providing creative arts programming through local colleges.

#### **VIII. HEALTHeKids (include if district agrees this is a focus for HEPD)**

- Improving the nutritional quality of snack foods and beverages
- Help increase children's physical-activity levels within our programs.
- Increase awareness of parks, playgrounds, walking paths and other opportunities to be healthy.
- Provide literature on nutrition, health and wellness to our residents and participants. HEALTHeKids Newsletter
- Bringing nutrition programs into parks.

**Sighted Sources:**

American Heart Association

Robert Wood Johnson Foundation

SFIA/Physical Activity Council

Child and Adult Care Food Program (CACFP)

US Social Security Administration

Green Spaces Restoration and Urban Naturalist Team (GRUNT)

National Institute for Early Education Research

USA Pickleball Association (USAPA)

NRPA Parks & Recreation Magazine

National Assembly of State Arts Agencies

Child Trends original analysis of monitoring the Future survey data, 1991 to 2011.