



HIGHLANDS RANCH
Metro District

Active Adult Services Feasibility Study

Final Report

February 12, 2018



**SINK
COMBS
DETHLEFS**
ARCHITECTURE DESIGN



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& ASSOCIATES LTD
Recreation Facility Planning and Operation Consultants

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Section I – Introduction

The purpose and scope of work for the Highlands Ranch Metro District, Active Adult Services Study is outlined below.

1. Lay the Groundwork

The B*K project team will meet with the core planning team for the Highlands Ranch Metro District including District staff and community partners. The goal of these meetings and the subsequent discovery process will be to:

- a. Understand more clearly the goals and expectations of the project
- b. Review the project process and timeline
- c. Complete an inventory of current programs and services with a focus on active adults
- d. Establish an inventory of active adult needs
- e. Identify community needs for active adult programs and services
- f. Determine partnership opportunities
- g. Develop clear and concise active adult program goals
- h. Assess challenges and opportunities

2. Involve the Public

The B*K team will lead a series of public input sessions to gain unique insights into the needs for active adult services in the Highlands Ranch community. This will consist of:

- a. Conduct interviews with the following groups:
 - Metro District staff (up to 3)
 - Key community resource specialists (up to 3)
 - Stakeholders (up to 5)
- b. Conduct public meetings (2)
- c. Meeting with the Metro District Board of Directors (2)
- d. Provide a summary of all information that is gathered from these sessions

3. Provide a Report

Based on the information that has been gathered in the first two phases of the project, the B*K team will develop a report that identifies key factors to consider for a possible future Active Adult Center. This report will contain:

- a. Highlands Ranch demographic trends analysis including future projections
- b. An analysis of national trends for active adult programming and facilities

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- c. A recommendation for the preferred model for active adult services delivery
 - d. Identification of space needs and approximate size of amenities in a new center

4. Develop an Action Plan

Utilizing the information that is contained in the basic report, the B*K team will create a specific action plan for how best to proceed with the development of a future Active Adult Center. The action plan will focus on:

- a. Partnerships that could enhance or be essential to the development of the center
- b. A preliminary determination of the overall size of the center and possible capital costs estimates
- c. A determination of possible operational costs and revenues.
- d. Recommendations for next steps in the planning process including a possible interim facility

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Section II – Market Assessment

Ballard*King & Associates (B*K) has conducted an active adult services study for the Highlands Ranch Metro District. As part of this effort, it is important to understand the market for such activities and programs.

Demographics

The following is a summary of the demographic characteristics within the Highlands Ranch Metro District and a slightly larger Secondary Service Area that expands the market to the south.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2017-2022 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities.

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Table A – Service Area Comparison Chart:

	Highlands Ranch Metro District	Secondary Service Area
Population:		
2010 Census	91,658 ¹	98,719 ²
2017 Estimate	100,878	109,234
2022 Estimate	107,042	115,992
Households:		
2010 Census	32,410	34,733
2017 Estimate	35,488	38,218
2022 Estimate	37,668	40,590
Families:		
2010 Census	25,122	27,090
2017 Estimate	27,310	29,626
2022 Estimate	28,858	31,336
Average Household Size:		
2010 Census	2.83	2.84
2017 Estimate	2.84	2.86
2022 Estimate	2.84	2.86
Ethnicity (2017 Estimate):		
Hispanic	8,472	9,095
White	87,759	95,013
Black	1,327	1,438
American Indian	357	385
Asian	6,590	7,228
Pacific Islander	61	64
Other	1,717	1,840
Multiple	3,067	3,267
Median Age:		
2010 Census	36.2	36.2
2017 Estimate	37.4	37.5
2022 Estimate	38.6	38.8
Median Income:		
2017 Estimate	\$113,655	\$114,962
2022 Estimate	\$119,923	\$121,493

¹ Between the 2000-2010 Census, the Highlands Ranch Metro District experienced a 36.2% increase in population.

² Between the 2000-2010 Census, the Secondary Service Area experienced a 37.5% increase in population.

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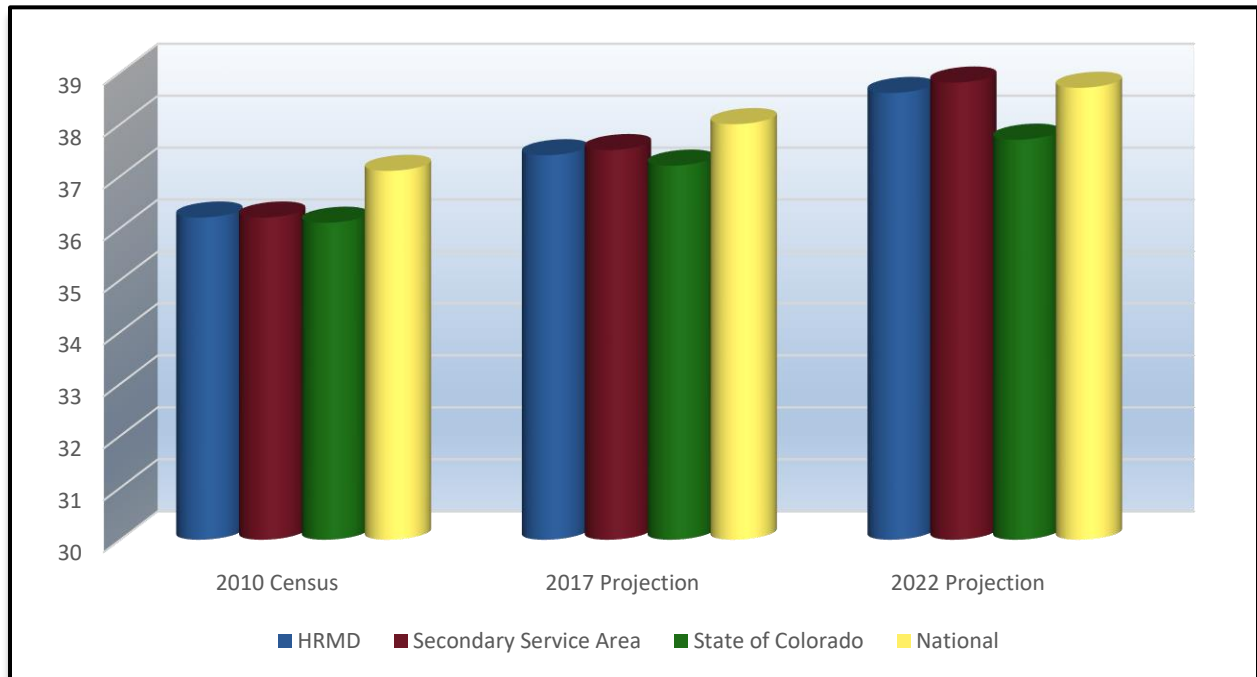


Age and Income: It is important to compare the median age and median household income levels to the state and national levels.

Table B – Median Age:

	2010 Census	2017 Projection	2022 Projection
Highlands Ranch Metro District	36.2	37.4	38.6
Secondary Service Area	36.2	37.5	38.8
State of Colorado	36.1	37.2	37.7
National	37.1	38.0	38.7

Chart A – Median Age:



The current median age in Highlands Ranch Metro District is slightly older than the State of Colorado but younger than the National number. The 2022 projection notes an aging population that is considerably older than the State and close to the National rate.

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Active Adult Population: The following chart provides the number of active adults (age 55+) and percentage of the total population that are in this age category.

Table C – Active Adult Population

	2017 Number of Active Adults	% of Population
Highlands Ranch Metro District	21,394	21.2%
Secondary Service Area	23,277	21.3%
State of Colorado	2,324,851	41.6%

As a point of comparison in the 2010 Census, 33.4% of United States population was age 55+.

	2010	2017 Projection	2022 Projection
Highlands Ranch Metro District	14,702	21,394	26,270
Secondary Service Area	15,838	23,227	28,734
State of Colorado	1,461,247	2,324,851	3,928,147

Nationally it is projected that the 65+ population will grow by 75% from 2010 to 2030. In the Highlands Ranch Metro District, the active adult population grew 45.5% from 2010 to 2017 and is projected to grow by 78.7% from 2010 to 2022.

Retirement Communities: It should be noted that the two major retirement communities in Highlands Ranch have the following number of residents.

	2017 Residents	Future Projections
Wind Crest	1,300	2,500
Vi	350	350
Total	1,650	2,850

These residents have most of their recreation and social service needs accommodated by the facilities where they live.

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Douglas County: The State of Colorado projects that following active adult population numbers for Douglas County in the year 2050. The total population of the County is estimated to be 481,315.

Age Categories	2050 Projections	% of Population
55-59	34,706	7.2%
60-64	28,793	6.0%
65-69	27,475	5.7%
70-74	25,664	5.3%
75-79	24,164	5.0%
80-84	19,950	4.1%
85-89	13,486	2.8%
90-94	7,040	1.5%
95+	2,915	6.1%
Total	184,193	38.3%

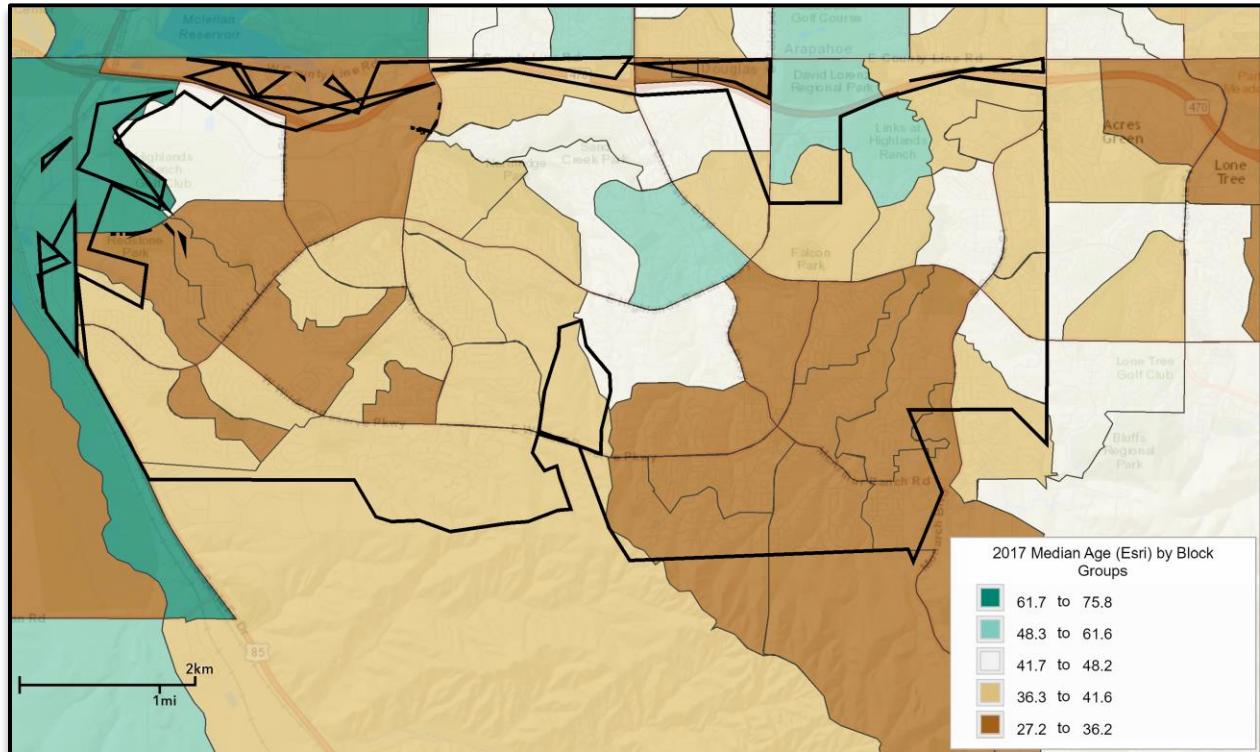
If the same 38.3 percentage is applied to the Highlands Ranch estimated population for 2022 (assumes very little overall population growth after this point), the estimated active adult population (age 55+) would be 40,997 by 2050. This is nearly double the estimated number of active adults in Highlands Ranch in 2017.

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Map A – Median Age by Census Tract



The map indicates that the central and far west area of Highlands Ranch has the highest age categories. This is also where the two retirement communities (Vi and Windcrest) are located.

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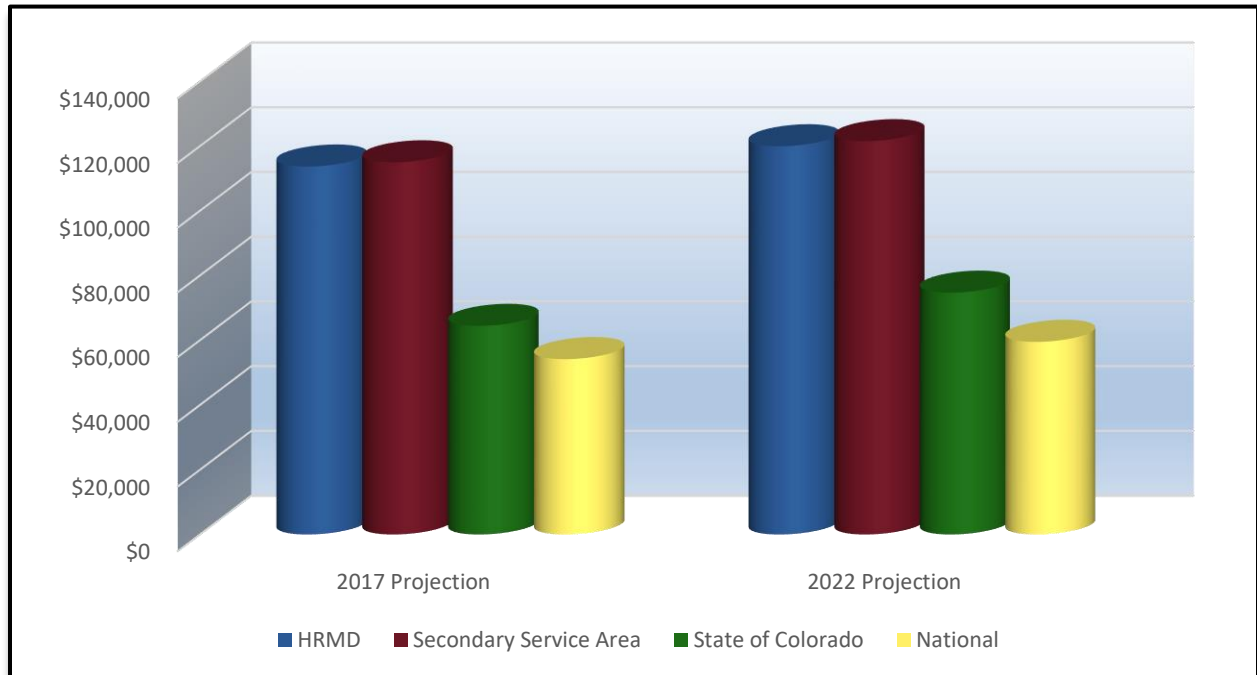
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Table D – Median Household Income:

	2017 Projection	2022 Projection
Highlands Ranch Metro District	\$113,655	\$119,923
Secondary Service Area	\$114,962	\$121,493
State of Colorado	\$64,401	\$74,664
National	\$54,149	\$59,476

Chart B – Median Household Income:



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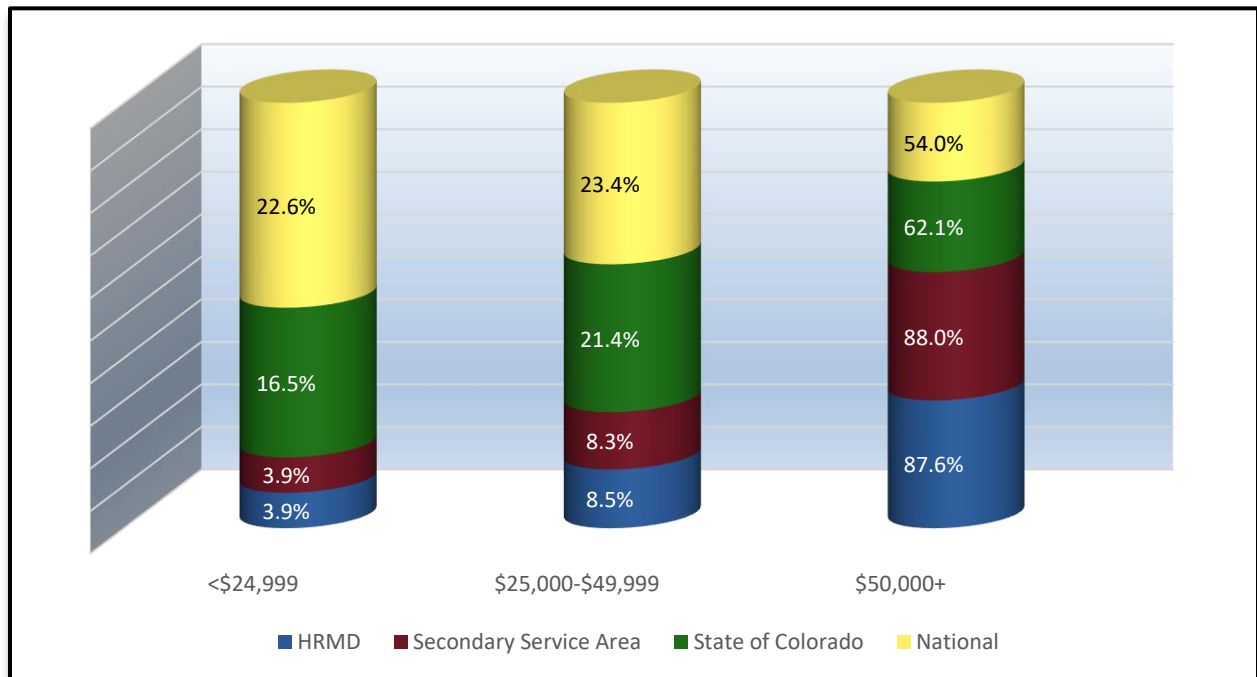


Based on 2017 projections for median household income the following narrative is available:

In the Highlands Ranch Metro District, the percentage of households with median income over \$50,000 per year is 87.6% compared to 54.0% nationally. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 3.9% compared to a level of 22.6% nationally.

The median income in Highlands Ranch Metro District is much greater than the State of Colorado and the National number. The income level must be balanced with the overall cost of living to determine ability to pay for entertainment and recreation services.

Chart C – Median Household Income Distribution

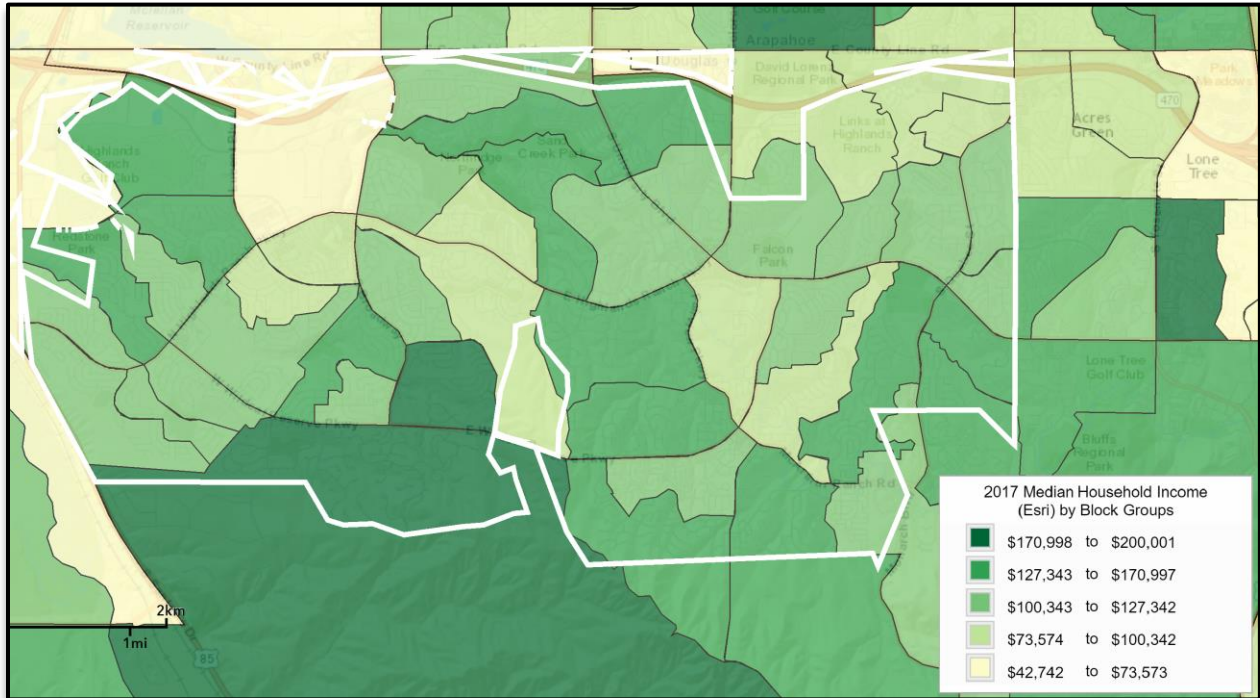


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Map B – Median Household Income by Census Block Group



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Household Budget Expenditures: In addition to studying Median Age and Median Income, it is important to examine Household Budget Expenditures. Looking at housing information; shelter, utilities, fuel and public services along with health care and entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

Table E – Household Budget Expenditures³:

Highlands Ranch Metro District	SPI	Average Amount Spent	Percent
Housing	168	\$35,649.83	30.0%
<i>Shelter</i>	171	\$27,699.65	23.3%
<i>Utilities, Fuel, Public Service</i>	158	\$7,950.18	6.7%
Health Care	164	\$9,175.74	7.7%
Entertainment & Recreation	172	\$5,367.61	4.5%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	170	\$36,257.27	30.0%
<i>Shelter</i>	174	\$28,171.68	23.3%
<i>Utilities, Fuel, Public Service</i>	161	\$8,085.6	6.7%
Health Care	167	\$9,342.23	7.7%
Entertainment & Recreation	175	\$5,463.39	4.5%

State of Colorado	SPI	Average Amount Spent	Percent
Housing	111	\$23,572.47	30.8%
<i>Shelter</i>	112	\$18,129.07	23.7%
<i>Utilities, Fuel, Public Service</i>	108	\$5,443.40	7.1%
Health Care	107	\$6,012.04	7.9%
Entertainment & Recreation	110	\$3,432.94	4.5%

SPI: Spending Potential Index as compared to the National number of 100.

Average Amount Spent: The average amount spent per household.

Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

³ Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2017 and 2022.

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Chart D – Household Budget Expenditures Spending Potential Index:

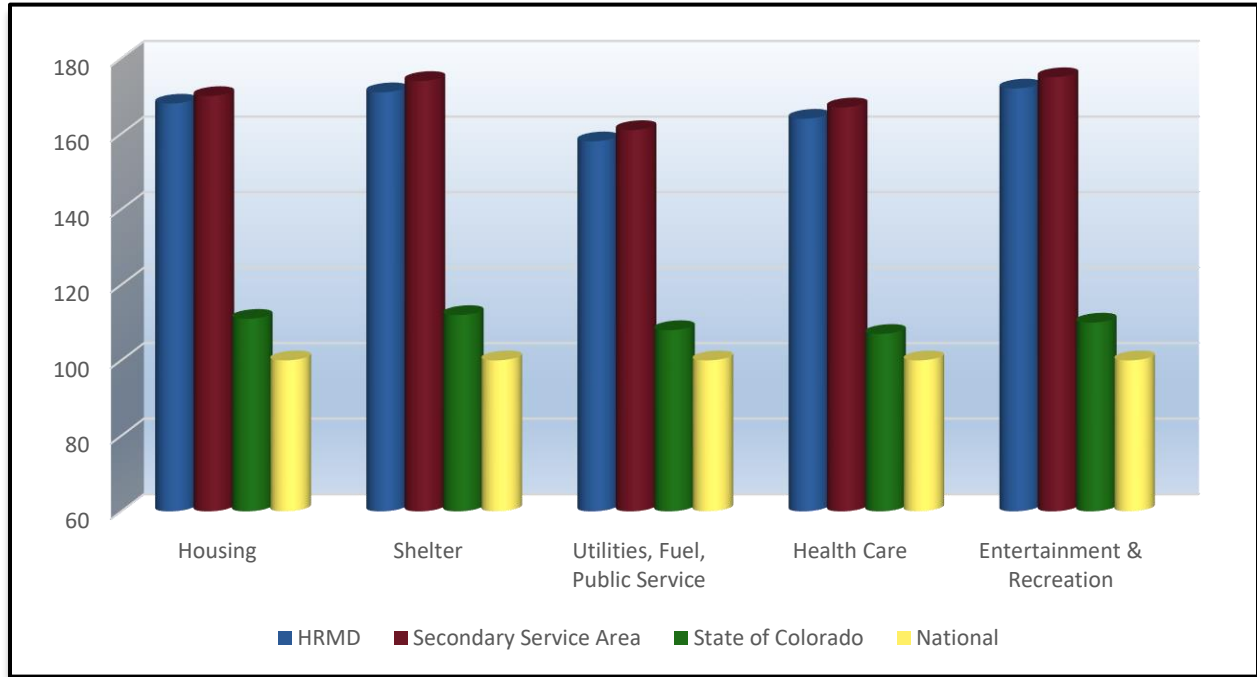


Chart D illustrates the Household Budget Expenditures Spending Potential Index in the service areas. The Highlands Ranch Metro District and State of Colorado area greater than the National number. This would indicate a higher cost of living in the area.

Further Narrative on Housing:

The total number of housing units in Highlands Ranch Metro District, according to the 2010 Census, is 33,480 and 96.8% of those are occupied, or 32,410 housing units. Of the vacant units:

- For Rent 1.0%
- Rented, Not Occupied 0.1%
- For Sale Only 1.0%
- Sold, Not Occupied 0.3%
- For Seasonal/Rec/Occasional Use 0.4%
- For Migrant Workers 0.0%
- Other Vacant 0.5%

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Recreation Expenditures Spending Potential Index: Finally, through ESRI, it is possible to examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

Table F – Recreation Expenditures Spending Potential Index⁴:

Highlands Ranch Metro District	SPI	Average Spent
Tickets to Theatre/Operas/Concerts	183	\$109.07
Tickets to Movies/Museums/Parks	185	\$142.86
Fees for Participant Sports	196	\$194.82
Fees for Recreational Lessons	215	\$286.20
Social, Recreation, Club Membership	192	\$404.84
Exercise Equipment/Game Tables	185	\$110.55
Other Sports Equipment	168	\$17.78

Secondary Service Area	SPI	Average Spent
Tickets to Theatre/Operas/Concerts	187	\$111.26
Tickets to Movies/Museums/Parks	188	\$145.17
Fees for Participant Sports	200	\$198.53
Fees for Recreational Lessons	219	\$291.95
Social, Recreation, Club Membership	196	\$413.25
Exercise Equipment/Game Tables	189	\$112.80
Other Sports Equipment	171	\$18.09

State of Colorado	SPI	Average Spent
Tickets to Theatre/Operas/Concerts	111	\$65.98
Tickets to Movies/Museums/Parks	115	\$88.52
Fees for Participant Sports	113	\$111.72
Fees for Recreational Lessons	113	\$150.54
Social, Recreation, Club Membership	111	\$233.46
Exercise Equipment/Game Tables	108	\$64.49
Other Sports Equipment	108	\$11.43

Average Amount Spent: The average amount spent for the service or item in a year.

SPI: Spending potential index as compared to the national number of 100.

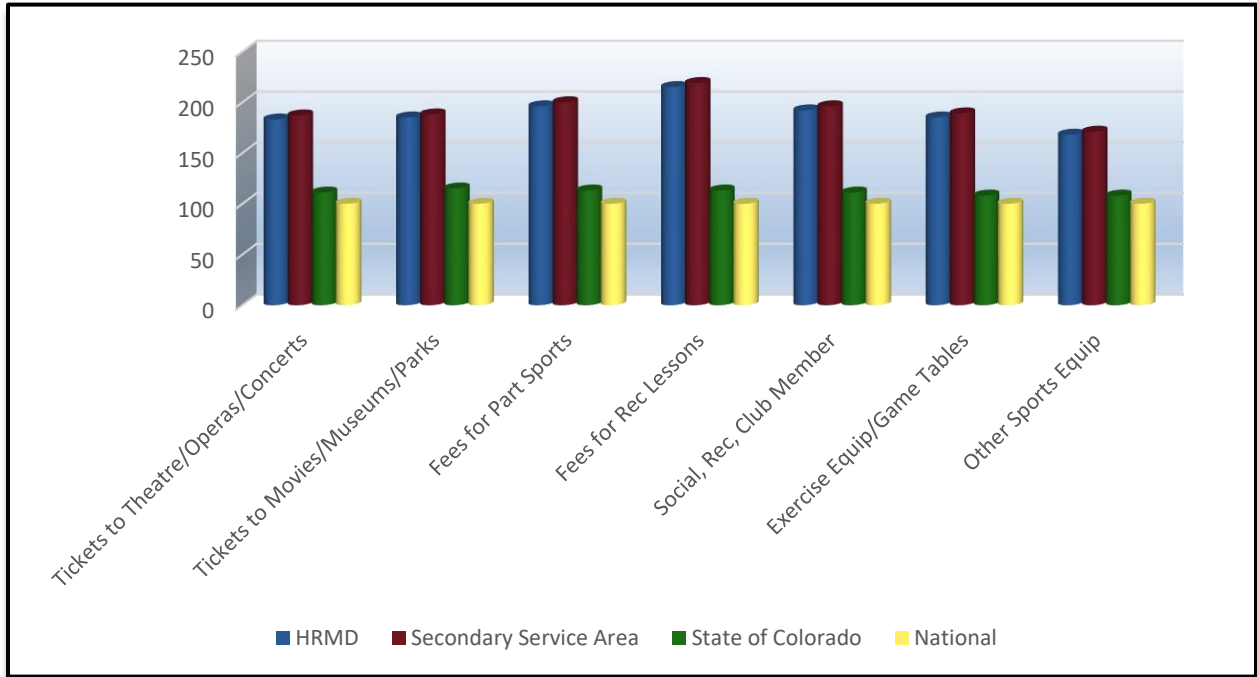
⁴ Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Chart E – Recreation Spending Potential Index:

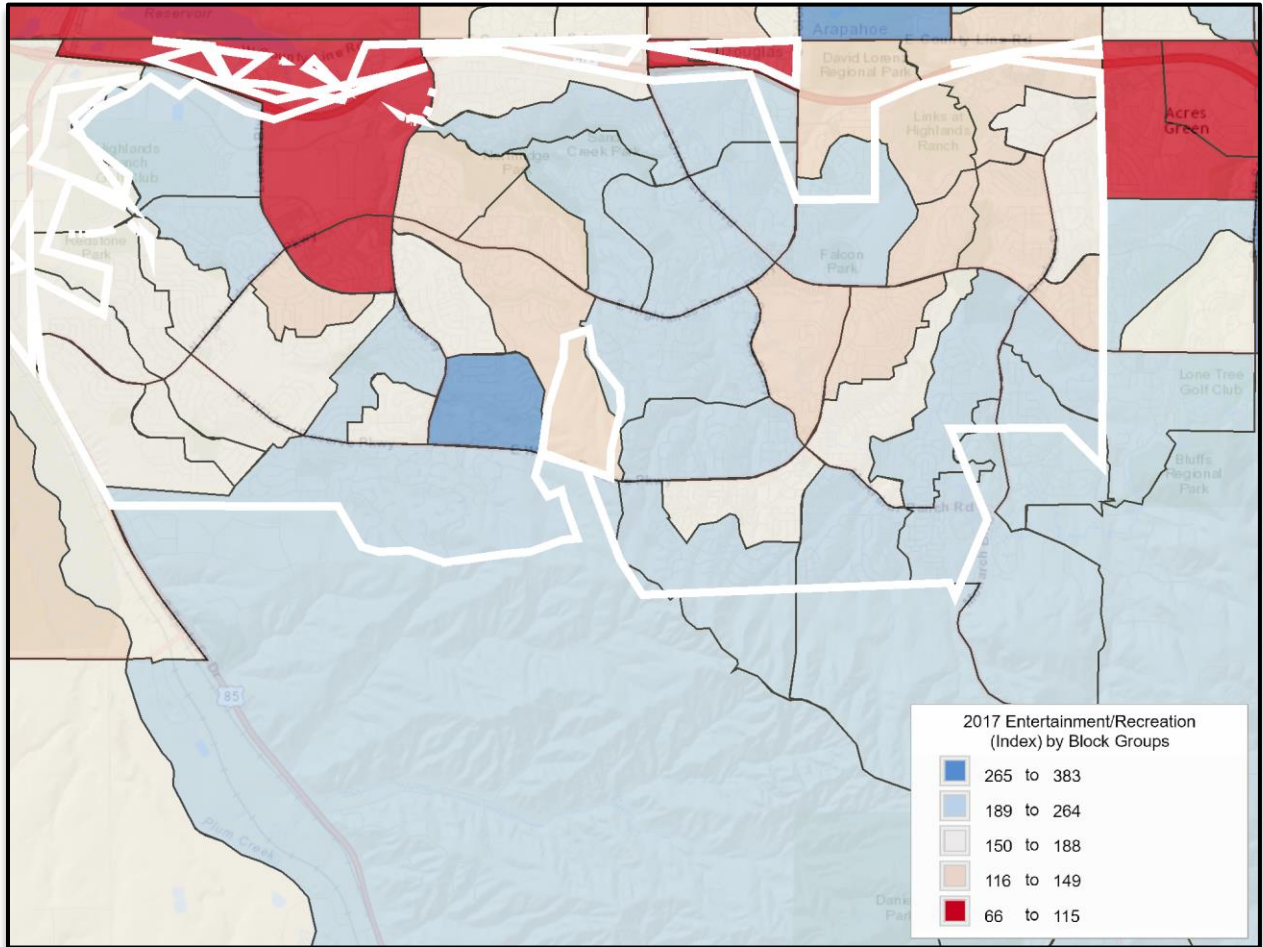


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Map C – Entertainment & Recreation Spending Potential Index by Census Block Group



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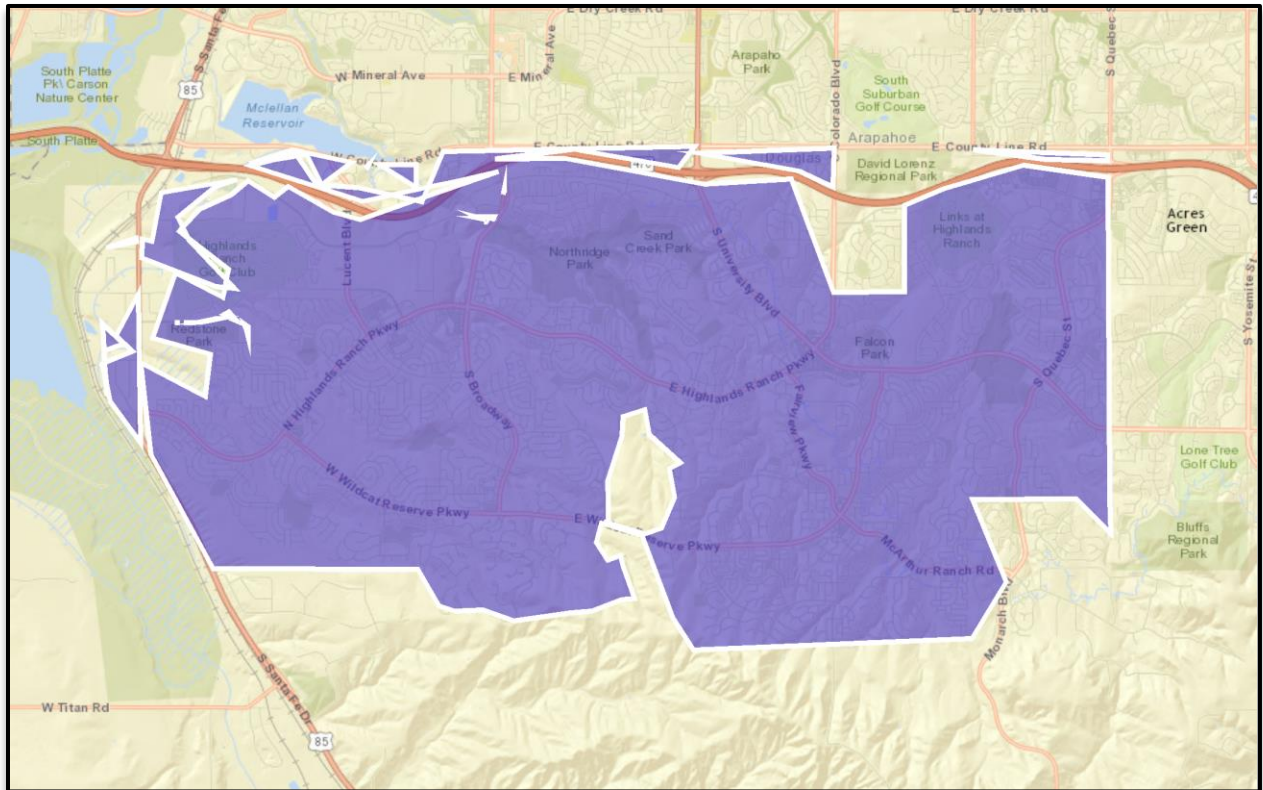
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Highlands Ranch Metro District Analysis: The following is a more in-depth analysis of the Highlands Ranch Metro District's demographic characteristics.

Map D – Highlands Ranch Metro District



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Population Distribution by Age: Utilizing census information for Highlands Ranch Metro District, the following comparisons are possible.

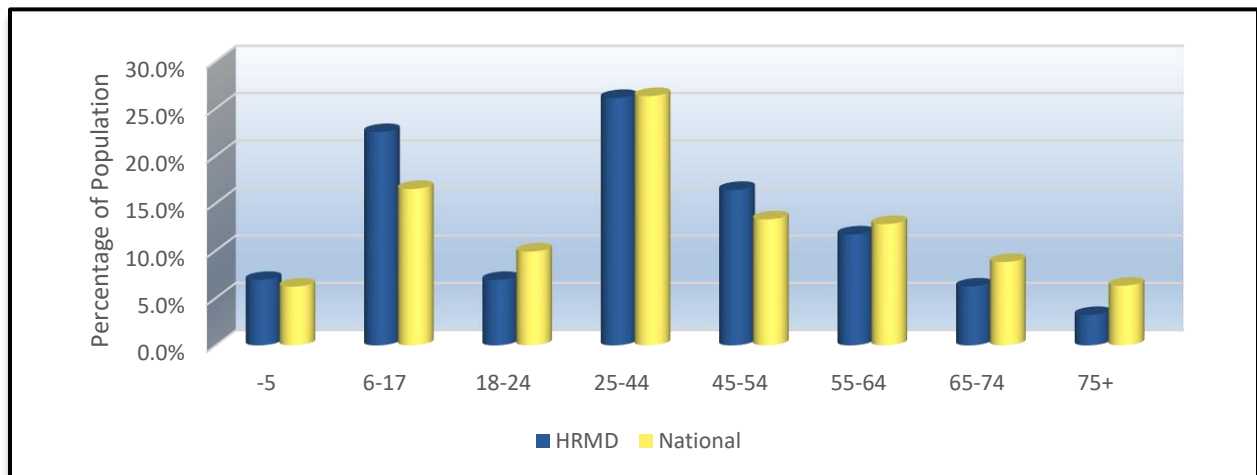
Table G – 2017 Highlands Ranch Metro District Age Distribution

(ESRI estimates)

Ages	Population	% of Total	Nat'l Population	Difference
-5	7,009	6.9%	6.2%	0.7%
5-17	22,587	22.5%	16.5%	6.0%
18-24	7,020	6.9%	9.9%	-3.0%
25-44	26,397	26.1%	26.3%	-0.2%
45-54	16,473	16.4%	13.3%	3.1%
55-64	11,900	11.7%	12.8%	-1.1%
65-74	6,196	6.2%	8.8%	-2.6%
75+	3,298	3.2%	6.3%	-3.1%

- Population:** 2017 census estimates in the different age groups in the highlands Ranch Metro District.
- % of Total:** Percentage of Highlands Ranch Metro District population in the age group.
- National Population:** Percentage of the national population in the age group.
- Difference:** Percentage difference between the Highlands Ranch Metro District population and the national population.

Chart F – 2017 Highlands Ranch Metro District Age Group Distribution



The demographic makeup of Highlands Ranch Metro District, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the age groups above the age of 55 and a much larger population in the age groups under 17. The largest positive variance is in the 5-17 age group with +6.0%, while the greatest

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negative variance is in the 75+ age group with -3.1%. However, it is important to note that the 45-54 age group is larger than the national population and these are tomorrow's active adults.

Population Distribution Comparison by Age: Utilizing census information from Highlands Ranch Metro District, the following comparisons are possible.

Table H – 2017 Highlands Ranch Metro District Population Estimates

(U.S. Census Information and ESRI)

Ages	2010 Census	2017 Projection	2022 Projection	Percent Change	Percent Change Nat'l
-5	7,307	7,009	7,178	-1.8%	+1.9%
5-17	21,821	22,587	22,371	2.5%	+0.5%
18-24	4,551	7,020	6,950	52.7%	+0.4%
25-44	27,826	26,397	28,088	0.9%	+9.6%
45-54	15,450	16,473	16,186	4.8%	-8.8%
55-64	8,614	11,900	13,383	55.4%	+18.2%
65-74	3,558	6,196	8,441	137.2%	+56.2%
75+	2,530	3,298	4,446	75.7%	+27.1%

Chart G – Highlands Ranch Metro District Population Growth

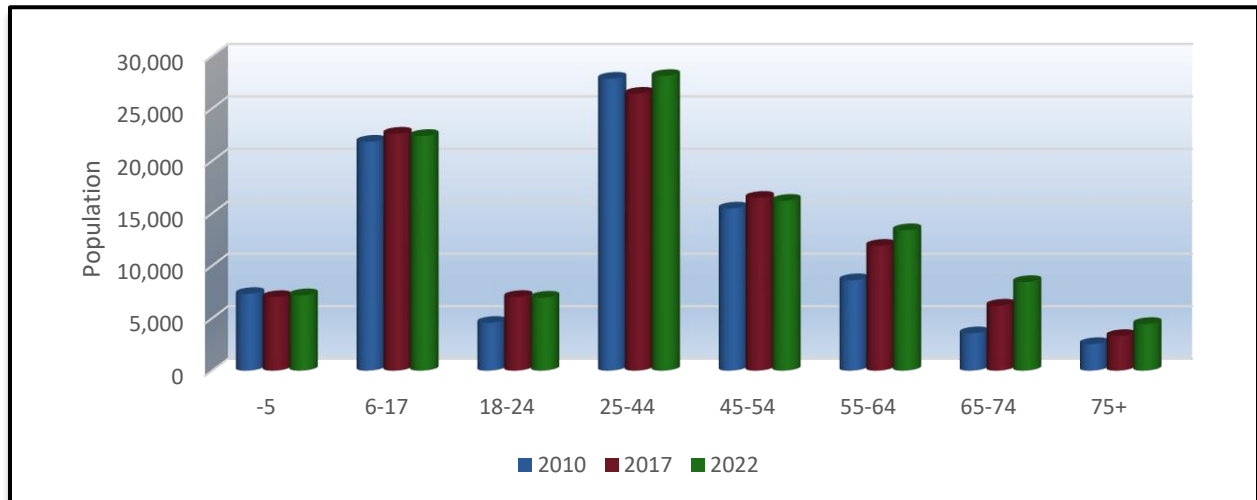


Table H illustrates the growth or decline in age group numbers from the 2010 census until the year 2022. It is projected that the active adult age categories will have the greatest percentage of growth of all age groups. Also, the rate of growth is much higher than the national numbers. However, it must be remembered that the population of the United States is aging and it is not unusual to find

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negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for Highlands Ranch Metro District for 2017 population projections. Those numbers were developed from 2010 Census Data.

Table I – Highlands Ranch Metro District Ethnic Population and Median Age 2017

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of CO Population
Hispanic	8,473	27.0	8.4%	10.0%

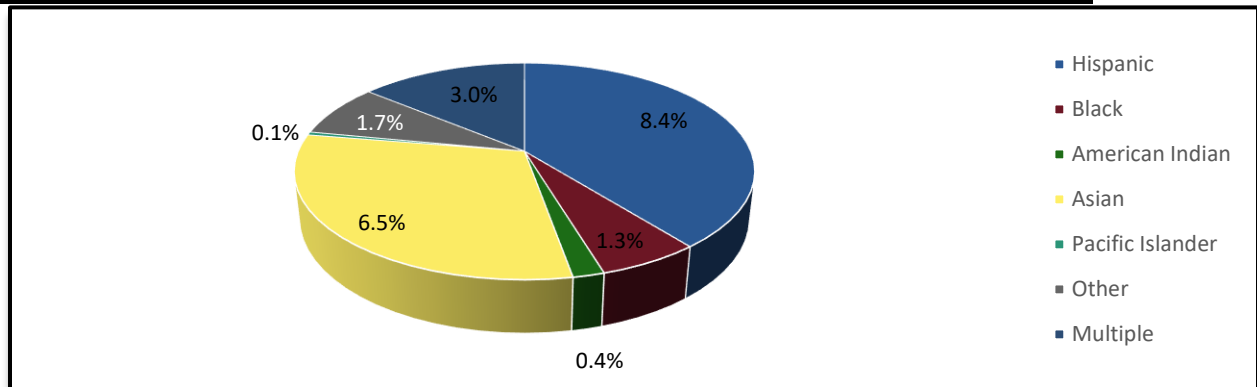
Table J – Highlands Ranch Metro District Population by Race and Median Age 2017

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of CO Population
White	87,758	38.3	87.0%	55.7%
Black	1,324	38.7	1.3%	29.7%
American Indian	357	35.1	0.4%	0.4%
Asian	6,588	36.5	6.5%	6.5%
Pacific Islander	61	36.5	0.1%	0.1%
Other	1,716	29.6	1.7%	4.4%
Multiple	3,066	15.2	3.0%	3.3%

2017 Highlands Ranch Metro District Total Population: 100,878 Residents

Chart H – 2017 Highlands Ranch Metro District Non-White Population by Race





Tapestry Segmentation

Tapestry segmentation represents the 4th generation of market segmentation systems that began 30 years ago. The 67-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. While the demographic landscape of the U.S. has changed significantly since the 2000 Census, the tapestry segmentation has remained stable as neighborhoods have evolved.

The value of including this information for the Highlands Ranch Metro District is that it allows the organization to understand better the consumers/constituents in their service areas and supply them with the right products and services.

The Tapestry segmentation system classifies U.S. neighborhoods into 65 individual market segments. More than 60 attributes including; income, employment, home value, housing types, education, household composition, age and other key determinates of consumer behavior are used to identify neighborhoods.

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provides a brief description of each. This information combined with the key indicators and demographic analysis of each service area help further describe the markets that the Highlands Ranch Metro District looks to serve with programs, services, and special events.

For comparison purposes, the following are the top 10 Tapestry segments, along with percentage in the United States. The Primary and Secondary Services may or may not reflect these segments:

1. Green Acres (6A)	3.2%
2. Southern Satellites (10A)	3.2%
3. Savvy Suburbanites (1D)	3.0%
4. Salt of the Earth (6B)	2.9%
5. Soccer Moms (4A)	<u>2.8%</u>
	15.1%
6. Middleburg (4C)	2.8%
7. Midlife Constants (5E)	2.5%
8. Comfortable Empty Nesters (5A)	2.5%
9. Heartland Communities (6F)	2.4%
10. Old and Newcomers (8F)	<u>2.3%</u>
	12.5%

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Table K – Highlands Ranch Metro District Tapestry Segment Comparison
(ESRI estimates)

	Highlands Ranch Metro District		Median Age	Median HH Income
	Percent	Cumulative Percent		
Professional Pride (1B)	31.5%	31.5%	40.5	\$127,000
Boomburbs (1C)	24.6%	56.1%	33.6	\$105,000
Soccer Moms (4A)	13.0%	69.1%	36.6	\$84,000
Savvy Suburbanites (1D)	9.6%	78.7%	44.1	\$104,000
Enterprising Professionals (2D)	8.0%	86.7%	34.8	\$77,000

Professional Pride (1B) – This segment leads a busy life with schedules often dictated by their school-age children. Their individual pursuits include reading, travel and exercising at home.

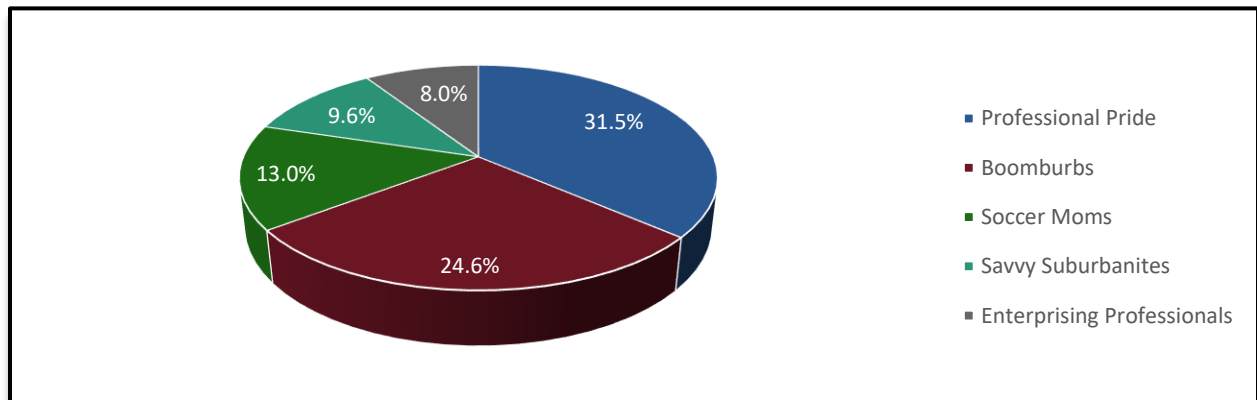
Boomburbs (1C) – A new growth market has families with young children. Style matters to this group as well as having the latest technology.

Soccer Moms (4A) – Family oriented pursuits for this demographic include watching movies and outdoor activities.

Savvy Suburbanites (1D) – Residents are well educated living as empty nesters or with adult children at home. They lead active lifestyles with an emphasis on staying physically fit.

Enterprising Professionals (2D) – Working long hours in front of the computer, this group attempts to stay youthful by exercising and eating healthy.

Chart I – 2017 Highlands Ranch Metro District by Tapestry



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United States Census Bureau: The Census Bureau through their American Community Survey instrument, has some basic active adult demographic information for the Highlands Ranch CDP (which is larger than the Metro District). This data is from 2015 and is based on age 65 and older.

- 39.7% of non family households have active adults living alone.
- 65% are married and 18% are widowed.
- 3.6% are living with grandchildren.
- 23.5% are veterans with 23.5% having some type of disability.
- 22.9% are in the labor force.
- \$69,603 is the mean earnings with \$21,591 being the mean Social Security income.
- 56.5% have retirement income with \$28,596 being the mean income from this source.
- 3.2% of active adults are living below the poverty level.

Demographic Summary

The following summarizes the demographic characteristics of the Highlands Ranch area.

- The population in the Highlands Ranch Metro District is estimated to be 100,878 in 2017 with 21,394 age 55 or older. This is 21.2% of the population.
- There is a growing active adult population (age 55 and over). It is projected that from 2010 until 2022 there will be a 78.9% increase or a growth of 11,568.
- 38.3% of population of Douglas County is projected to be active adults by 2050. This could equate to 40,997 active adults (55 and over) in Highlands Ranch. This is nearly double the current active adult population.
- The Highlands Ranch area has a relatively high cost of living but also higher income levels. This is true for active adults as well.

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Active Adult Service Providers in Highlands Ranch:

Within Highlands Ranch there are currently a number of entities that focus on active adult services. This includes:

Primary Providers

Highlands Ranch Metro District – The District has made a commitment to providing information, referrals to services, lifelong learning, social and recreational activities for active adults. They have a dedicated active adult staff person who coordinates programs and services and works with other providers in the area as well. This is done primarily through the 50 & Better Together program and Senior Outreach of Highlands Ranch. This is all accomplished without the benefit of a specific physical location to serve active adults.

Highlands Ranch Community Association – The HRCA has a portion of one staff person’s time who coordinates some active adult programs and activities, but the primary approach is to integrate active adults into existing adult programs and services. Despite the existence of four recreation centers, there is only one small room at the Southridge Recreation Center that is dedicated to active adult programs and activities and this space is basically controlled by a single user group.

Douglas County Libraries – The libraries have made a conscious effort in the last 5 plus years to develop more lifelong learning and other socialization programs through the different branch library locations, including Highlands Ranch.

Douglas County – The County has a number of programs and services that are oriented toward active adults primarily through the Adult Services Program Manager. Most of these services focus on transportation and other social services. This includes:

- Aging in place services
- Social services
- Personal care/chore services
- Adult day care
- Adult protective services
- Active adult transportation

Some services are also administered through its Neighbor Network program that is volunteer run organization and First Call a telephone based active adult resource instrument. The County also provides the Seniors Council Douglas County, which promotes living well/aging well at its monthly meetings.

MARKET ASSESSMENT

*Highlands Ranch Metro District
Active Adult Services Study*



The County primarily provides money and resources to other organizations. They also provide some state (DRCOG) and County grants.

Other Groups/Organizations

Senior Club – This volunteer run, non-profit, organization operates out of the Senior Lounge at the Southridge Recreation Center. It has a monthly lunch program at the center and they also feature card game based activities during the week.

Osher Lifelong Learning Institute – Operated through the University of Denver, this is an adult education program with a focus on the 50+ population.

City of Lone Tree – Although they do not operate an actual active adult center, the City does provide some basic active adult services through the “Living and Aging Well in Lone Tree” Ad Hoc Committee and their monthly luncheons and speaker series.

Denver Regional Council of Government (DRCOG) – This agency provides access to active adult resources and services through the Area Agency on Aging and also has contacts through its Network of Care.

Churches – A number of churches in Highlands Ranch (St. Andrew United Methodist Church, Cherry Hills Community Church, etc.) have specific programs for active adults. These tend to focus on socialization, education and social service programs.

Health Care Organizations – The hospitals and other health care providers (South Denver Heart center, etc.) in the area have health based services available for active adults in Highlands Ranch.

Highlands Ranch Historical Society – This non-profit organization’s primary objective is to provide programs with a historical focus, preserve and enhance historical places and people, and participate in community outreach activities. Many of their activities are focused on active adults.

Active Adult Centers/Facilities

Other communities in the greater Highlands Ranch market have active adult programs and facilities. This includes the following facilities.

Douglas Buck Center – This center has a distinctive focus on active adults, but it does serve all age groups. The center has a number of active amenities including a pool, gym, track and fitness area as well as a series of multi-purpose rooms and other spaces. The center is operated by the South Suburban Parks and Recreation District.

MARKET ASSESSMENT

Highlands Ranch Metro District

Active Adult Services Study



Lone Tree Recreation Center – This center is also operated by South Suburban and is a multi-generational center that has mostly active spaces including a pool, gym, track and fitness. There are specific programs and services for active adults as well.

Parker Senior Center – This reasonably small facility with a series of classrooms and multi-purpose space, is operated by a 501(c)(3). They offer a daily meal program as well as more traditional active adult programs and activities.

Parker Recreation Center & Parker Fieldhouse – The Town of Parker provides a variety of programs and services oriented toward active adults from its two indoor recreation facilities. Programs include sports, arts, fitness, and general interest.

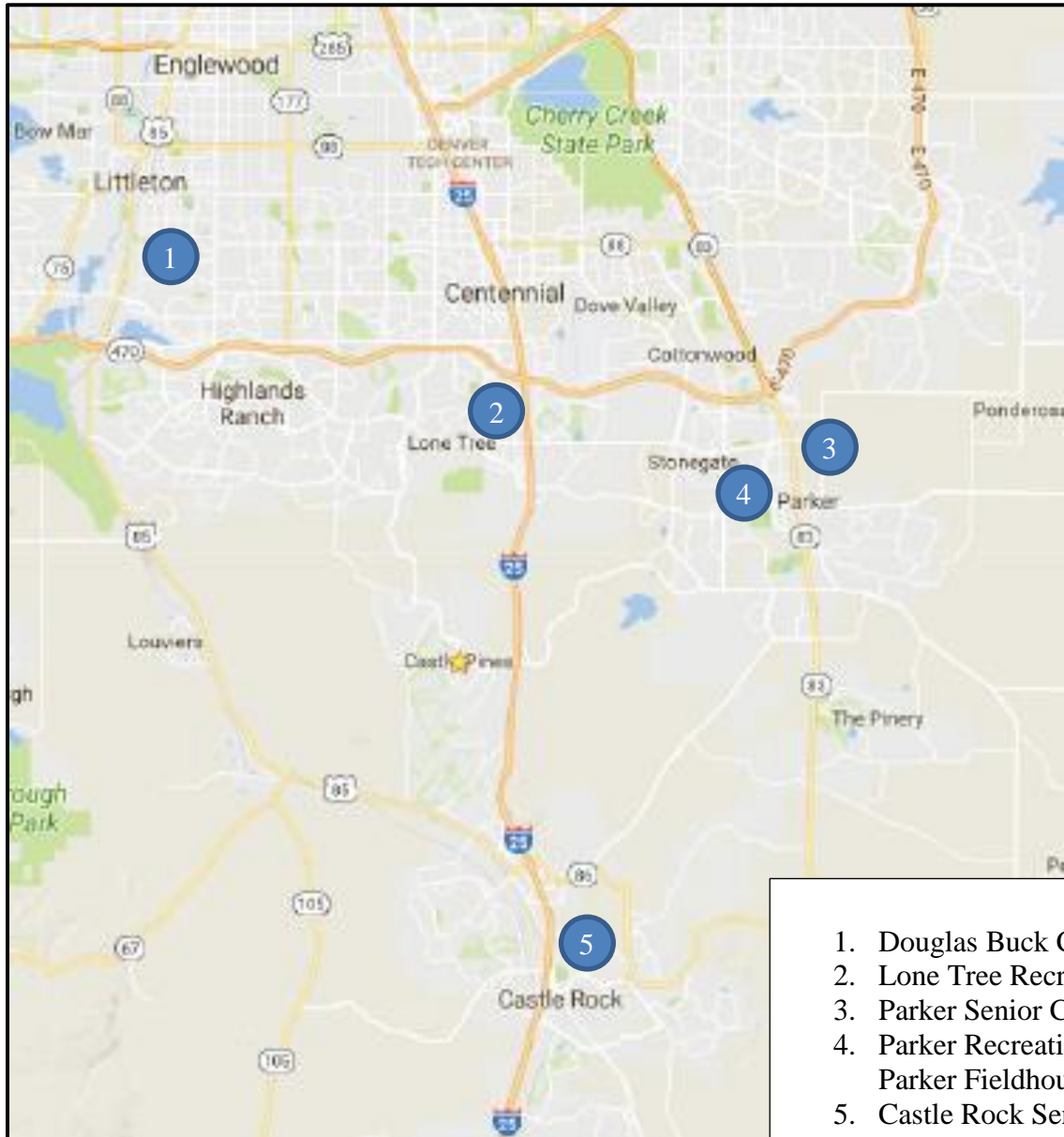
Castle Rock Senior Activity Center - The center is located at the north end of the Castle Rock Community Recreation Center. This active adult center is operated by a 501(c)(3) and they provide a variety of programs and services for active adults. There is also a three day a week lunch that is served.

MARKET ASSESSMENT

*Highlands Ranch Metro District
Active Adult Services Study*



Map – E Active Adult or Recreation Service Providers



MARKET ASSESSMENT

*Highlands Ranch Metro District
Active Adult Services Study*



Market Conclusions:

The following summarizes the market for active adult services in Highlands Ranch.

- Highlands Ranch has a population of just over 100,000 with 21,500 age 55+. This number is expected to grow to nearly 41,000 by 2050.
- There are reasonably strong rates of participation in active recreation activities by individuals that are age 55+.
- There are a number of active adult service providers in Highlands Ranch but there is no active adult focused recreation center.
- Most of the surrounding communities (Littleton, Parker, Lone Tree and Castle Rock) each have an active adult center or a centralized source of information about active adult programs and services, even though their overall populations are much smaller than Highlands Ranch.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District
Active Adult Services Study



Section III – Community Input Summary

A major aspect of an active adult services needs assessment study is an effort to gather information from organizations currently providing services for middle aged and active adults of Highlands Ranch itself. As a result, several input mechanisms were utilized to ensure that a strong cross section of input from a variety of individuals, community leaders, and other providers was acquired.

Focus Groups - A series of focus groups were conducted in June and July of 2017. The following is a summary of the information that was gathered from these sessions.

Douglas County Libraries

Peggy Norris

Adult Services Department Head

6/8/17

- The library sees a need for additional active adult services in the future and staff has been meeting to determine specifically what needs to be done.
- The library system recognizes that there are an increasing number of active adults in Douglas County as well as in Highlands Ranch.
- Have a Lifelong Learning program that meets the 2nd Friday of each month.
- May develop a specific active adult area in the library in the future.
- The library has a good relationship with the Metro District and they want to make sure that they are not duplicating services but there is not a lot of on-going coordination.
- Some of the greatest needs include:
 - o Transportation
 - o Central gathering place/socialization
- They are willing to partner in the future to increase the number of active adult services that are available.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



Highlands Ranch Metropolitan District

**Allen Dreher
Renee Anderson
Carolyn Schierholz
Nancy Smith
Board of Directors
6/12/17**

This represents an overall summary of the interviews with each of the Directors.

- The District has limited programs and services for active adults right now. This is due to the fact that there is no real location for providing these services.
- It will be important to have demographic data that shows the number of active adults in the District today as well as forecasts for the future.
- Active adults need a home to call their own.
- The District should consider using one of its existing buildings for an active adult center before building something new. This could be:
 - o Mansion
 - o Young House
 - o Fly'n B
- An active adult center should be a place to meet and socialize. It could have rooms for cards, meetings, educational sessions, food service, a game room and other activities. Other active adult organizations should be able to use the center as well. The focus would be more on non-active uses.
- The District should continue its role as an active adult services clearinghouse and coordinator of services and should not be the only provider of actual programs.
- It will be difficult for the District to fund a building in the next 5-8 years due to other financial obligations.
- The Highlands Ranch Community Association should have a role in providing active adult services as well. However, with the requirement that their programs cover all their costs, this could be difficult. Right now, they have only a small space in Southridge to support active adult activities and this is primarily done through the Senior Club.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



-
- Douglas County should be expected to fund some aspect of a new center. They currently fund one half of Jodie's salary but provide little else.
 - Churches and the library are also key providers of active adult services and the District should coordinate services with them.
 - Forming equity partnerships with other agencies and organizations to build and operate an active adult center will be critical.
 - It is possible that a new active adult center could be paired with other amenities/services as well, this includes teen/youth center, District offices, library, health services, sports and community centers, etc.
 - Transportation for active adult services is an issue.
 - Parker, Castle Rock and Lone Tree all have active adult centers, why not Highlands Ranch?

Highlands Ranch Community Association

Ken Joseph – Operations & Programs Director

Jamie Noebel - Director of Community Relations, Marketing & Events

Meredith Parker – Art & Education Supervisor

Heather Goetz-Zetl – Education Coordinator

6/16/17

- HRCA provides very few actual active adult programs. Mostly they provide space for other organizations including the Senior Club. Heather is responsible for active adult programming and this is only a small aspect of her job responsibilities.
- In the past, they tried to develop specific active adult programming, but this was not well utilized so now HRCA attempts to integrate active adults into overall adult programming. Specific active adult programming is left to other organizations. The failure of active adult specific programming is partly due to difficulty marketing to active adults and their lack of knowledge on what was available through HRCA.
- HRCA recognizes that they will need to increase active adult services in the future with the changing demographics in Highlands Ranch but are not sure exactly how this will be done. There is likely to be a continued focus on integrating active adults into adult programs in the near future.
- HRCA does not want to compete with Metro District services.

COMMUNITY INPUT SUMMARY

*Highlands Ranch Metro District
Active Adult Services Study*



-
- The Senior Club has a monthly luncheon, weekly meetings, card games and other activities. They are not charged for using the Southridge Recreation Center for these services.
 - HRCA does not have a specific age for designation of an active adult.
 - HRCA does have a requirement that all programs have fees cover their direct cost of operation as well as personnel and facility overhead. This can be an issue for some programming for active adults. There is not a fee assistance program in place (scholarships for individuals that cannot afford the fees that are being charged). They do allow non-residents to take advantage of HRCA programs, but they are charged a higher rate. There are also active adult discounts available for some programs but there is not a set level (percentage) for this discount.
 - In the future, there needs to be one point organization and person to coordinate active adult services in Highlands Ranch. There is also a recognition that HRCA needs to coordinate better with the Metro District on active adult services.
 - HRCA is currently conducting a feasibility study for an events/arts center and it is possible that there could be an active adult element to this facility. It is anticipated that this center will also serve as a location for on-going classes, meetings and rentals.
 - Determining the role of the Metro District and HRCA in providing active adult facilities and services in the future will need to be determined.

Douglas County

Valerie Robson – Adult Services Program Manager

Jennifer Eby, Assistant Director, Community and Resource Services

Tom Cornelius, DC Senior Council President & DC Sheriff's Community Liaison

6/20/17

- The role of the County in providing active adult services is working with the various communities to develop resources. This includes:
 - o Aging in place services
 - o Social services
 - o Personal care/chore services
 - o Adult day care
- They provide some state (DRCOG) and County grants.
- The County really provides money and resources to other organizations.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



-
- The Sheriff's office deals a lot with safety issues related to active adults. There is an adult protection team that focuses on active adults and people with disabilities.
 - There is a Senior Council that meets once a month and it is supposed to provide input on active adult needs, but this is not real effective.
 - The County has a First Call phone number that receives about 1,000 calls a month regarding active adult services.
 - Transportation for active adult services is a major issue that the County is trying to deal with as a result of the demise of the RTD Call & Ride services. They are considering a ride share or a voucher system.
 - Neighbor Network is a volunteer organization for transportation, homemaker services, and handyman services.
 - There is a problem reaching people that really need the most help. It is a challenge to get information out about active adult services that are available.
 - The faith based community has a role in providing active adult services and they should be a part of any future plans.
 - There are other areas outside of Highlands Ranch (Acres Green) that could take advantage of active adult services as well.
 - A new active adults center in Highlands Ranch would provide a central location for services. The facility should include a dining center.
 - The future role of the County in providing active adult services could be:
 - o There will be greater needs for active adult in the future and this will require more involvement from them.
 - o Wants to continue to create partnerships with existing providers.
 - o Human Services will continue to be provided in-house by County staff.
 - o The County has an interest in potentially partnering on an active adult center as a location to provide more services. Capital funding is not likely.
 - o The County will continue to take on the role of a coordinating agency.
 - The Highlands Ranch Metro District role should:
 - o Need to promote the services that are currently available.
 - o Partnering with other providers for an active adult facility and services will be essential. There should be no duplication of services.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



- Should consider connecting an active adult wing to an existing HRCA recreation center. There should not be a stand-alone active adult center.

Highlands Ranch Metro District

Terry Nolan – General Manager

Jeff Case – Director of Public Works

Stephanie Stanley – Director of Finance

6/21/17

- It is recognized that there is a growing active adult age group in Highlands Ranch, but the exact size of the active adult population needs to be validated.
- The vision for the project will depend on the direction of the board.
- Jodie's role is more of a resource person than a program provider.
- In 2002 the Metro District had an initiative to enhance recreation services and this included an active adult center. This effort was not successful.
- Douglas County should be more involved in providing active adult services. This could include a full-time active adult coordinator, help with funding a center and better transportation for active adults.
- HRCA currently does very little for active adults and they should have a bigger role in providing recreation services for this age group.
- The Metro District is not seen as the actual provider of most active adult services but as an enabler. This could involve some funding for other organizations and/or some funding for an actual building.
- An active adult center should not be a stand-a-alone facility but ideally part of another HRCA recreation center other Metro District facility. May need to rent storefront space as a first step. Strong consideration should be given to building a facility as part of Wildcat Regional Park.

Senior Club

Ron Winter – Board President

Del Miller – 2nd Vice President

Sue Frommelt – Member at Large Board Member

6/26/17

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



-
- The club was started about 13 years ago utilizing the Senior Lounge in the Southridge Recreation Center as a location for social programs for active adults. Most of the activities are card game related and there is also a monthly luncheon that is held in the Wildcat Mountain Auditorium.
 - The Senior Club is a 501 (c) 3 that has 300 paid members (\$10 a year) and they have close to 130 for the monthly luncheon. The monthly luncheon has a fee of \$7 for the catered meal and some entertainment. They have sponsors that also help to underwrite the cost of the lunch.
 - The Senior Lounge is too small for most activities at approximately 700 SF. It can hold a maximum of 38 people for cards. The club does not pay for use of the room or the auditorium for the monthly luncheon.
 - Volunteers run most of the programs and organize the luncheon. It is sometimes difficult to find enough volunteers.
 - The active adult program at Northridge was moved to Southridge but they remain as a separate organization that utilizes the same space.
 - It is difficult to get things done when the Senior Club must deal with the HRCA, Metro District and even the County. HRCA is often too revenue driven. They only want programs and services generate revenues. The Metro District has Jodie, but she is more social service oriented as is the County.
 - They are missing a number of spaces that would help to grow their program:
 - o No place to just “hang-out”.
 - o No meeting, gathering space.
 - o The space dedicated to active adult activities is too small.
 - o They need a small library area
 - o Need their own kitchen and a place for meals (beyond the monthly luncheon).
 - The future should include:
 - o Convert one of the existing HRCA recreation center to an active adult center.
 - o Add on to an existing HRCA recreation center (this is the best option). This would require a separate entrance and some dedicated active adult space.
 - o The school age population is going to decrease in Highlands Ranch and it may be possible to utilize an elementary school in the future for an active adult center.
 - o Active Adult Center vision includes:
 - Commercial kitchen/community room with a 2-3 day a week lunch
 - Lounge area

COMMUNITY INPUT SUMMARY

*Highlands Ranch Metro District
Active Adult Services Study*



- Card game room
 - Library – small area for books and reading
 - Media center – area with computers
 - Active recreation area – pool tables, etc.
 - Arts center
 - The center will need to have full-time staff to manage the center and its programs. The Metro District should be the operator as they are more community oriented.
- Other issues include:
- The meal program will be the key. It will draw people to an active adult center.
 - Transportation is a major concern, especially after Call & Ride was discontinued.
 - An active adult facility will need to be centrally located in Highlands Ranch.

Stakeholder Interview Summary

The following is a brief summary of the overall findings from the stakeholder interviews.

- There is a recognition that Highlands Ranch has a growing active adult population and there will be a need for increased services for this age group.
- There are currently a number of organizations that are attempting to coordinate services for active adults in Highlands Ranch but there is no lead agency or major actual recreation service provider.
- Identified needs include social services, transportation and more traditional (non-active) recreation activities.
- Partnering with other governmental and non-profit agencies will be critical to expanding active adult services. There is a strong need to better coordinate services and any new efforts must not duplicate what is being done by others.
- In order for active adult recreation services to be effective, there needs to be a “home” for these activities. This could take on a number of options:
 - A temporary facility that utilizes an existing Metro District building, storefront or other location.
 - A facility that is part of larger more diverse facility that might include County or Metro District offices.
 - An expansion of an existing HRCA recreation center.
 - A stand-alone active adult center is not seen as a viable option.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District

Active Adult Services Study



-
- Determining a location for an active adult center, funding the development of the facility and being able to sustain operations will be the challenge.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study

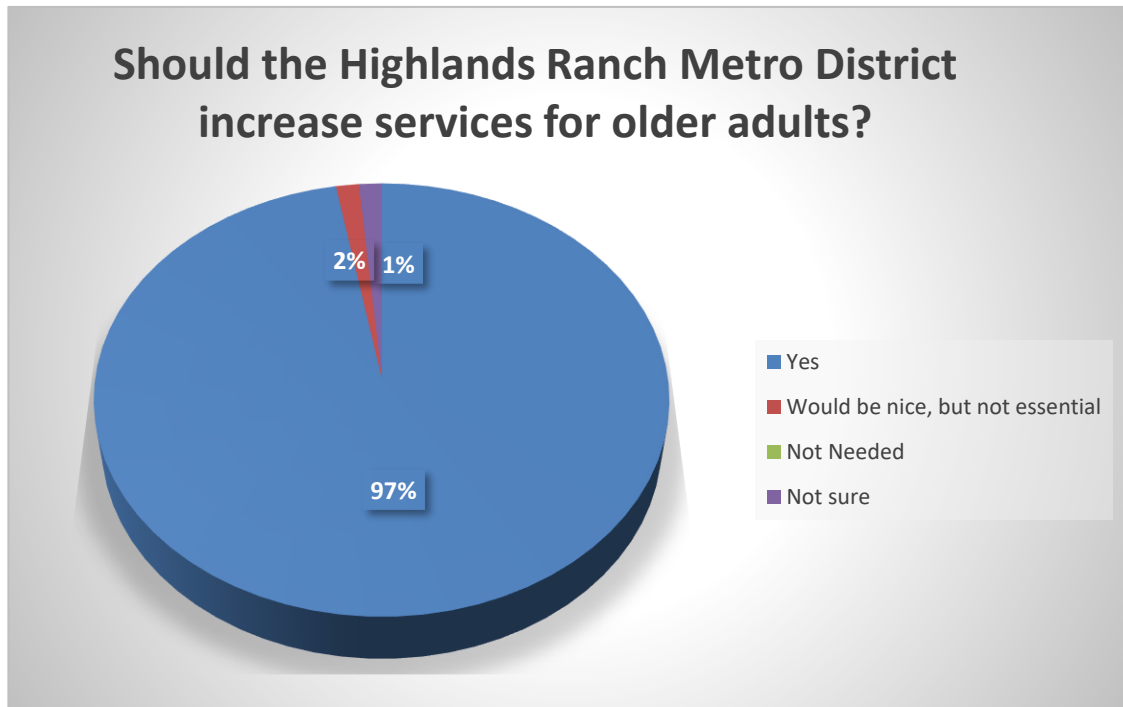


Community Open House – On Tuesday August 15th, 2017 a community open house to determine active adult needs and expectations was held at the Highlands Ranch Metro District office. A series of stations were set up with boards where the public could respond to a series of questions. There were approximately 100 individuals present for this event. There were a significant number of people from the Senior Club.

Question 1

Should the Highlands Ranch Metro District increase the level of services for older adults?

Yes	69
Would be nice, but not essential	1
Not Needed	0
Not sure	1



Comments from Post-It Notes: (Verbatim)

- Yes, for Senior Center- Long Range
 - Implementing Silver Sneakers NOW!-need HRCA Rec Center
 - I agree to increased funding. I already pay for 2 HOA's.
- Senior Shuttle Bus Service

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



-
- Senior Center modeled like Centennial- Goodson, Fort Collins, Commerce City
 - Should not be called 'Senior Center'. Need active adult activities for people working and engaged in professions.
 - Definitely some transportation for those unable to drive.
 - Seniors should be able to take grand children to Rec Center with NO charge We pay as much for services as families with children.
 - Build a Senior Center- Fund staff and programming
 - The 55+ group is a major economic force in the community and deserves to be served.
 - Separate activity center
 - Need a dedicated Sr. Center. Need to join 'Silver Sneakers' program to provide free services like South Suburban (things HRCA charges extra for). Need more age-group specific activities (e.g. 65 yr-olds want/need different things than 85 yr-olds).
 - I would like to see a pass for grandparents to take visiting grandchildren to the pools with no fees.
 - Senior Center #1. Transportation #2 (light rail and bus service).
 - 100,000 residents and no senior drop in center- Shocking!
 - What's first- Art and Culture Center or Senior Center?

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District
Active Adult Services Study

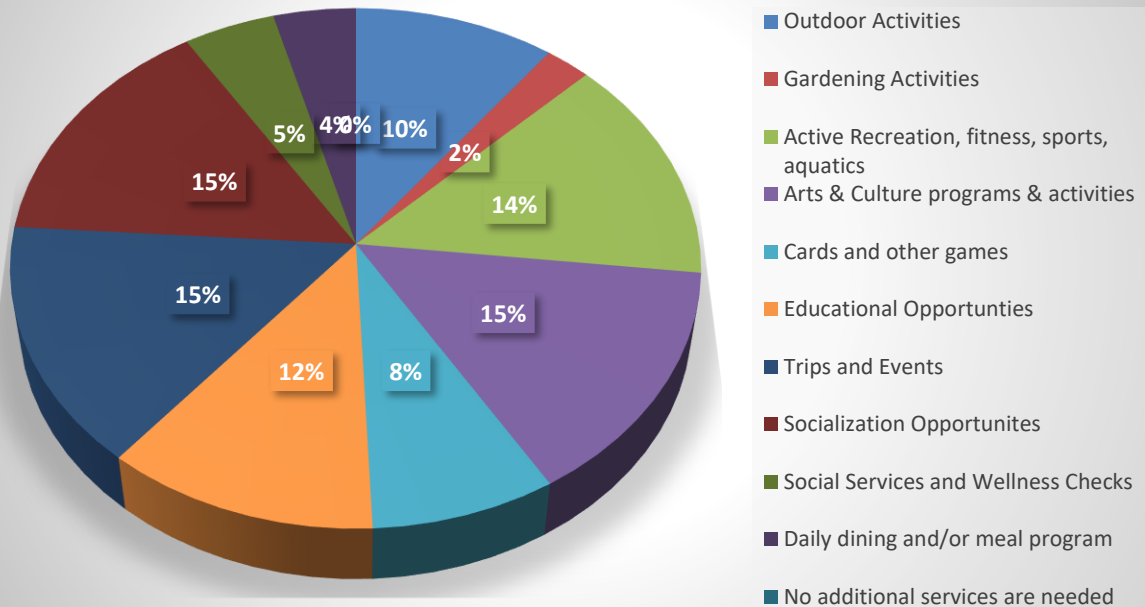


Question 2

What types of older adult services are most important for the Highlands Ranch Metro District and/or its partners to provide?

Outdoor Activities	22
Gardening Activities	5
Active Recreation, fitness, sports, aquatics	30
Arts & Culture programs & activities	31
Cards and other games	17
Educational Opportunities	25
Trips and Events	32
Socialization Opportunities	32
Social Services and Wellness Checks	10
Daily dining and/or meal program	9
No additional services are needed	0

What older adult services are most important?



Comments from Post-It Notes: (Verbatim)

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District
Active Adult Services Study



Active recreation pursuits such as fitness, sports, and aquatics

- 1-Walking track, not running track. 2-separate senior area for workout equipment. 3- area for dance lessons.
- This part is adequate now via rec center.
- Maybe dance classes or social dancing.
- Silver Sneakers
- Golf, Senior Days with senior rates.

Cards and other games

- Pool tables, Ping Pong
- Need more space- Definitely multiple rooms
- Please don't call it 'Senior Center'
- Need active older adult for working professional. We don't all need sedentary activities.

Educational Opportunities

- Cooking classes
- Computer classes

Socialization opportunities

- Senior Club Monthly
- Luncheons are growing
- Need Bigger space
- Maybe do more times per month
- Need a focus on '65 & better together' (big difference between years 50 + 65)
- Senior Dances
- Socialization is major for seniors that's why a senior center would be perfect

Additional Comments

- Daily dining
- Some type of senior program for seniors to help other seniors in need
- Golf!!-It would be nice to have lower rates at special days and times.
- It would be nice to have more/bigger rooms to do the activities
- Senior Center to congregate for meals and place to socialize daily
- Transportation to grocery and other stores
- I'd like to see Silver Sneakers in Highlands Ranch
- Silver Sneakers/ lunch programs
- There isn't Silver Sneakers and we want it.

COMMUNITY INPUT SUMMARY

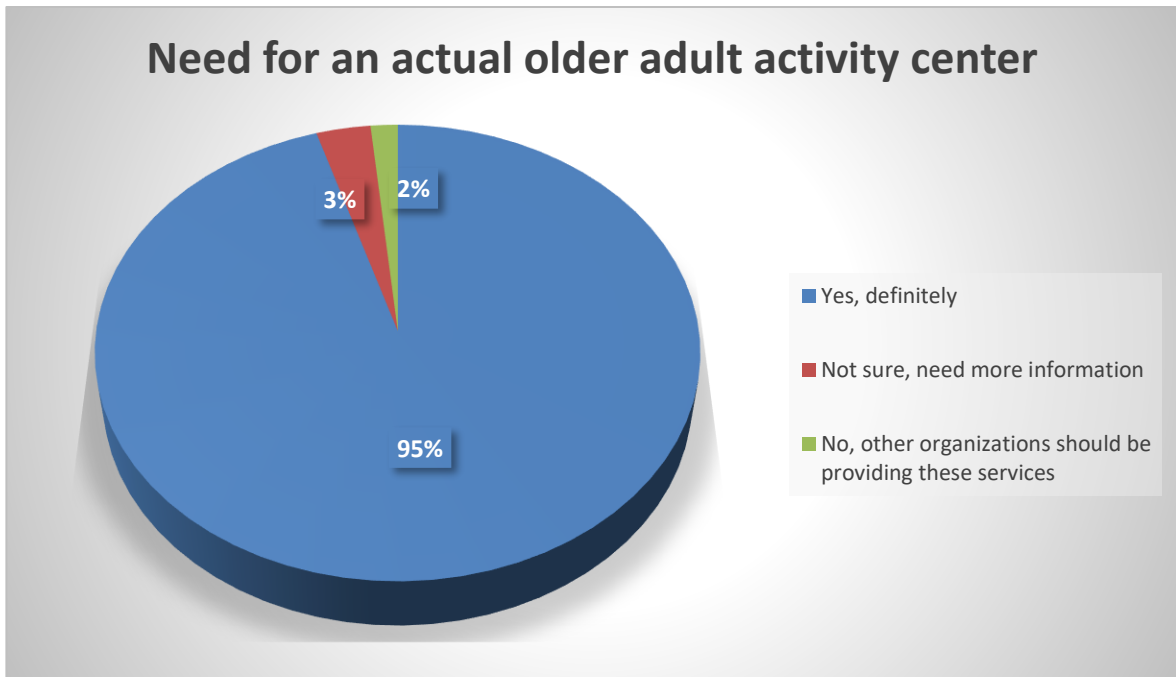
Highlands Ranch Metro District
Active Adult Services Study



Question 3

Is there a need for an actual older adult activity center in Highlands Ranch?

Yes, definitely	60
Not sure, need more information	2
No, other organizations should be providing these services	1



Comments from Post-It Notes: (Verbatim)

- How would you (Highlands Ranch Metro District) get a bond issue to pass for a separate older adult center?
- How could HRCA start carving out the current rec centers to give LOTS more space to older adult areas? Is it easier to raise HRCA dues?
- Need senior center- need Silver Sneakers
- A senior center should be 'top priority' in HR- especially with 21k seniors
- Make the center have enough space to house the current # of people attending our senior club luncheon and entertainment- over 100
- Gym space for a variety of activities

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



- Large space (can be divided) for events: parties, movies, available for rental, daily lunch program
- Private rooms for classes, games, hobbies, health checks, social services
- Café: hot coffee/chocolate, snacks and treats from local bakeries, tables and chairs/couches for conversation
- Need daily lunches for seniors and more transportation help
- With over almost 95,000 people we need a drop-in center

Question 4 – Are There Other Issues or Concerns?

Comments from Post-It Notes:

- Highlands Ranch is getting grayer. Need to cater to the aging population and not the younger people all the time.
- Light rail is our only transportation that we used to travel downtown for baseball games and the theater. ‘Please’ bring light rail to highlands ranch.
- Get Silver Sneakers in our rec centers.
- HRCA Pools- more adult only time per day time. Now it is only 5 min at the hour, which is not enough time.
- HRCA rec centers- adult only hot tub after fitness classes.
- Want Silver Sneakers.
- Need RTD tours (for Seniors)
- Parking at DOB is not enough. Need temporary handicap signs.
- Active Minds Classes
- Silver Sneaker Free classes (It’s income for Metro District/HRCA)
- Rooms for coffee get-togethers, open day and evening for drop-in and reading.
- ‘Active at Any Age’ publication like South Suburban
- My husband and I are both active in the Senior Club providing a monthly meal and good entertainment. In a few years, I would like a place to go where I don’t have to volunteer and have some things I can enjoy.
- After years of putting community to families and kids, population is aging and only place for seniors is leftover space or share with other groups.
- #1 Senior Center- meals, games, entertainment, classes, lounge, tv, coffee, game tables, etc.
- Senior center should be built on 10 acre plot that is on Cresthill. The Douglas County Schools want to build a charter school there.

COMMUNITY INPUT SUMMARY

Highlands Ranch Metro District Active Adult Services Study



-
- Single story housing
 - You need to join Silver Sneakers for us.
 - Neighbor Network- for rides to doctor etc.
 - I don't want to move out of H. R. to get an active 'senior' community.
 - Maybe should advocate for a general oversight or coordinating committee to look at: metro district, HRCA, fire/water/sewer, etc.
 - A senior center adjacent to 1 of 4 rec centers is ideal. Incorporate Silver Sneakers.
 - We need entertainment games- Bingo

Summary of Community Open House Findings

- There is a strong demand for additional active adult services in Highlands Ranch.
- The specific types of active adult services desired include:
 - Trips and Events
 - Socialization opportunities
 - Arts & Culture
 - Active Recreation, Fitness (Silver Sneakers), Sports or Aquatics
- There is a strong desire for an active adult activity center in Highlands Ranch

Highlands Ranch Metro District Survey

Although not part of this particular study, in 2014 the Metro District contracted with National Research Center to conduct a survey of Highlands Ranch residents regarding a number of issues including the need for programs and services for active adults. Key findings of the survey included:

- A need to provide active adult services that focus on:
 - Health, fitness, and sports
 - Health and wellness services
 - Transportation
- There was strong support for designating space within an existing building for active adult services but not as much support for a separate active adult center.
- There was a mid-range of support for funding expanded active adult services through property taxes and fees but far less support for a property tax increase to fund the construction and operation of a new active adult center.

ACTIVE ADULT SERVICES & FACILITIES TRENDS



Highlands Ranch Metro District Active Adult Services Study

Section IV – Active Adult Services and Facilities Trends

The ultimate success of active adult services and active adult facilities in the future will be dependent on meeting the needs of a variety of older adults. From the traditional social activities and meal functions, to more medically based programs, and a variety of fitness and sports activities, to educational and social service programs, the role of active adult programs and facilities is expanding. While most existing active adult centers tend to focus on the older (75 years and older) and the more sedentary active adult, the fastest growing segment of society are the Baby Boomers which are entering the active adult age groups in record numbers. Meeting the needs of this group is important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active adult is paramount, as this age group has a strong interest in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services.

The ever-increasing demand for programming and especially more active pursuits has put a real squeeze on the number of indoor recreation facilities that are available for active adult activities. Most of the existing active adult centers are in older buildings that were modified from their original use. They are often small, have one central multi-purpose room, several classrooms, a kitchen area and rarely enough storage space. As a result, more active recreation activities have had to take place in other public facilities (general recreation centers) or were simply not offered by active adult centers. This often has forced active adults to utilize facilities provided by the private sector or even non-profit agencies such as YMCA's and JCC's.

Another increasing focus of active adult activities and facilities is providing a variety of social service functions and services. Many of these activities are offered by other providers but take place at active adult centers. Providing smaller assessment rooms and meeting space has become an important amenity in newer centers. Partnerships with health care providers for medically based services has also gained in popularity.

Specific Active Adult Program and Service Trends

The following identifies key program trends for active adults.

Socialization – Still one of the key areas of focus, socialization opportunities are a big aspect of most active adult programming. This can include meals, presentations, special events and other similar activities.

Social Services – The provision of a wide range of social service needs from tax assistance, medical services, transportation, legal services and home services are often provided by other organizations

ACTIVE ADULT SERVICES & FACILITIES TRENDS



Highlands Ranch Metro District Active Adult Services Study

but are available at an active adult center. Job assistance and/or volunteer opportunities are also part of this.

Education – There is a growing demand for educational opportunities for active adults in a variety of ways from current events, to history, science and foreign languages. These classes or courses are often provided by colleges and libraries.

Fitness/Wellness – This is the area of greatest growth for active adult programming. From basic fitness classes and Silver Sneakers, to healthy cooking/eating, and medically based wellness services, there are a wide range of programs that are filling this need. Partnering with a health care agency has been particularly effective in increasing services in this area.

Cultural Arts – Offering a range of programs from visual arts to the performing arts is common as well as opportunities to attend cultural arts events and performances.

Outdoor Recreation – Another area of strong growth is in outdoor recreation from hikes to cross country skiing, fishing and gardening, there are a variety of program opportunities.

Sports – This covers common sports such as basketball, volleyball, tennis and softball to new sports such as pickleball.

Aquatics – The use of warm-water pools for aqua exercise classes to water walking and even swimming lessons is popular.

General Recreation – This area covers a variety of programs from card playing to self-improvement classes and technology based instruction.

Nutrition - In the form of a daily lunch program as well as special occasion meals, this has moved from a meat and potatoes fare to a lighter and more healthy meal program. These have often been provided in a more café type setting with less of an institutional feel. There may be times when alcoholic beverages are available as well.

Trips – Trips to a variety of activities from cultural activities, historical sites to sports events, for most active adult centers this continues to be an area of emphasis.

Special Events – This covers events focused on holidays, birthdays, and unique happenings and other activities.

Specific Active Adult Center Trends

Active adult centers continue to evolve.

ACTIVE ADULT SERVICES & FACILITIES TRENDS



Highlands Ranch Metro District Active Adult Services Study

Traditional Active Adult Center

The more traditional active adult centers that were built thirty years or more ago usually contain these basic spaces –

- Relaxation areas and lounge space
- Multi-purpose rooms – for meetings, dining and other functions
- Arts & crafts rooms
- Billiard and game rooms

These spaces have often been in a building that is rather institutional and unattractive.

New Active Adult Center

Active adult centers that have been built in the last fifteen-twenty years include the traditional spaces noted above but may also contain some of these spaces –

- Indoor pool- used for fitness and therapy
- Fitness/wellness center
- Gym- with a track
- Small libraries/reading rooms
- Computer rooms
- Cafes
- Demonstration kitchens
- Access to parks trails and outdoor fitness areas

Stand-alone active adult centers have been relatively rare due in part to the large and expensive building requirements that are in place. This has resulted in active adult centers being integrated into more general recreation facilities where the more active spaces (pools, fitness and gyms) can be shared.

Future Active Adult Center

Continuing into the future, active adult centers will need to serve the Baby Boomers and their more active lifestyle. As a result, the future active adult center will continue to be part of more general recreation centers and will contain the traditional and new spaces as well as an orientation toward the following –

- Specialized services

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- Massage/physical therapy
- Personal fitness training
- Access to entertainment
- Babysitting services -for grand children

- Special Accommodations
 - Comfortable, warm and inviting environment
 - A place that feels like home
 - A variety of active and passive use spaces in the same facility
 - Practical and functional spaces
 - Upscale dining
 - Strong use of technology

Keys to the Future Success of Active Adult Centers

- Don't call it a senior center, active adult or other term is a better descriptor.
- There needs to be a wide range of services available in the program areas noted above.
- There must be partnerships with a wide variety of agencies and organizations to meet the broad range of services that are in demand for active adults.
- Active use elements need to be major amenities that are present as part of a larger community recreation center.
- Programs and services need to be offered in the evenings and on weekends to meet the needs of active adults that continue to work.
- Multi-generational opportunities need to be present but not for all situations or activities.
- There needs to be a lead agency that is willing to coordinate the services and facilities that are focused on active adults.
- High quality programs and services in a high quality facility.

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Section V – Active Adult Services and Facilities Needs Assessment Summary

Based on the information gathered through the market assessment, community input and trends analysis, the following needs assessment summary is possible.

- With a 2017 population of nearly 21,500 age 55+, there is a sizeable active adult market present in Highlands Ranch. This population segment is projected to grow to 26,270 by 2022 and to nearly 41,000 by 2050.
- The increasing size of the active adult population will require a greater focus on active adult services and ultimately the facilities that need to support these activities.
- There are a number of existing active adult resources available in the Highlands Ranch market area but there is no one coordinating agency present and there is a lack of a “home base” for the delivery of these services.
- From the focus group interviews, it was recognized that there is a need to increase programs and services for active adults.
- The Highlands Ranch Metro District should have a role in meeting active adult needs and should partner with other organizations to expand services.

Challenges

- Determining how best to meet the needs of active adults both now and in the future and then prioritizing these needs.
- Determining the role of the Highlands Ranch Metro District in delivering active adult services in the future.
- Establishing a “lead agency” for the coordination of active adult services in Highlands Ranch.
- Determining viable partners in this effort and coordinating these services.
- Establishing a physical location to deliver active adult services.
- Determining the possible financial requirements for the Highlands Ranch Metro District to expand active adult services to the community and possibly develop an active adult center.

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Opportunities

- There are a variety of agencies and organizations currently providing some level of services for active adults in Highlands Ranch.
- There are opportunities to partner with other governmental agencies and community organizations to expand active adult services.
- Highlands Ranch has four existing recreation centers that could be enhanced for active adult services.

Partnership Analysis

To maximize the delivery of active adult services and possibly even an active adult center, forming partnerships with other community organizations and providers is important. However, for partnerships to be effective the following must occur.

- Must actively pursue and sell the benefits of the partnership.
- Weigh the benefits vs. the cost of the partnership.
- Don't compromise on the original vision and mission of the project.
- Establish a shared partnership vision.
- Expect compromises to meet different needs and expectations.
- Clearly define development and operations requirements.

Through the stakeholder meetings portion of the study, a number of organizations and entities were identified as possible partners for increasing active adult services. These include:

- Highlands Ranch Metro District
- Highlands Ranch Community Association
- Douglas County
- Douglas County Libraries
- Douglas County Sheriff
- Senior Club
- Health Care Providers (UC Health)
- Churches

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- Community Organizations
 - Business and Corporate Community

The following is a general summary of the potential partners and recommendations for how to proceed with partnering on active adult services.

Specific Project Roles – After reviewing the partnering assessment for each organization the partnerships can be categorized into three possible levels.

Primary or Equity Project Partners – These would be the main partners who have the most interest, the ability to fund, and a willingness to be a part of increasing active adult services.

- *Highlands Ranch Metro District* – The District already has shown a solid commitment to providing services for active adults. They are the lead agency for coordinating active adult services in Highlands Ranch and as a result should be considered as the lead partner for future active adult program and service development as well as a possible active adult center.
- *Highlands Ranch Community Association* - The homeowner’s association is the primary provider of indoor recreation programs and services for the community and has some existing active adult programs. In addition, they own and operate four indoor recreation centers, one of which has a small active adult area. As a result, they should be considered as a main partner for the Metro District in active adult recreation programming and ultimately in the development and operation of a potential active adult center. This will require a significant increase in the HRCA’s commitment to active adults.
- *Douglas County* – The County already has a significant role in providing active adult services to residents of Highlands Ranch. They are also already a partner with the Metro District in these efforts. So, it should be expected that the County will continue to partner with the Metro District in the expansion of services and even the development of an active adult center. The County should continue to provide transportation and social service programs and also help with funding Metro District services. They should also help with some capital funding for an actual active adult center as well.

Secondary Project Partners – These organizations should have a direct interest in increasing active adult programs and services in Highlands Ranch. However, operational and capital funding is unlikely but there should be some assistance with program and service delivery.

- *Douglas County Libraries* – The library has a commitment to active adult services already and it should be expected that this will continue. Coordinating these efforts with the Metro District will be important moving forward.

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- *Douglas County Sheriff* – The sheriff’s office helps with safety issues related to active adults and this is a valuable partnership that needs to be enhanced in the future.
- *Senior Club* – The club is already a provider of some basic active adult programming in Highlands Ranch and it should be expected that this will not only continue, but also grow in magnitude.
- *Health Care Providers* – There are a significant number of health care providers in the Highlands Ranch area and continuing to work with these providers will be very important if the level of active adult services related to health and wellness is going to increase. The new UC Health hospital in Highlands Ranch will provide a unique opportunity to grow this type of partnership. Partnerships between public entities and medical providers can be very beneficial for both parties and this should be strongly pursued.
- *Other Active Adult Service Providers* – In an effort to offer a wide variety of active adult programs and services, partnering with select other active adult providers is encouraged.

The key factor with the secondary partners is to determine what programs and services are most appropriate for this delivery method realizing that there is the potential for overlapping services.

Support Partners – These organizations should support increasing active adult services but would see limited to no direct involvement in this effort.

- *Churches* – Some of the larger churches in the area have active adult services that they are providing while others do not. Gaining their support for expanded active adult services will be important.
- *Community Organizations* – Developing working relationships with community organizations and service clubs could provide much needed support for the effort to increase active adult services.
- *Business and Corporate Community* – It is important to approach the corporate community with a variety of sponsorship opportunities to enhance active adult programs and services.

Support partners would have a limited impact on the actual growth of active adult services in Highlands Ranch but their involvement in the process should still be a priority to build overall awareness of the needs.

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Model for the Delivery of Active Adult Services

The following is the recommended model for the delivery of active adult services and the development of a possible active adult center.

- The Highlands Ranch Metro District will need to make a long-term commitment to increasing services for active adults. This could include an increase in staffing and service delivery and possibly capital and operations funding for an actual active adult center.
- There will need to be a clear decision if Highlands Ranch Metro District is willing to be the lead and coordinating agency for active adult services in the future. Since the Metro District is the primary local governmental agency serving Highlands Ranch, this role is realistic.

In reality, if it is not the Metro District, it would need to be the Highlands Ranch Community Association or a new non-profit organization (this could be accomplished through the existing Highlands Ranch Park and Recreation Foundation) that is formed for this purpose.

- The Highlands Ranch Metro District should create and formalize an Active Adult Council made up of agencies that support active adult services in Highlands Ranch. Key members of the Council should include:
 - Highlands Ranch Metro District
 - Highlands Ranch Community Association
 - Douglas County
 - Douglas County Library
 - Senior Club
 - Churches
 - Health Care Providers
 - Community Organizations

The Council will need to have a clear vision statement with specific goals and organizational bylaws. Specific roles and responsibilities for delivering active adult services for each organization will need to be established.

- The Highlands Ranch Metro District will need to establish formal partnerships with other organizations to meet the needs of active adults in the future. The primary partners will likely need to be HRCA and Douglas County. Developing clear roles and responsibilities with the partners will be paramount. This should include resource and funding commitments.

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- An incremental plan for the next 10 years will need to be established that has distinct steps to increase services for active adults and eventually lead to the possible building of an active adult center. This plan should indicate the required staffing, facilities and funding that is needed to implement the steps.
 - Increase active adult programs and services offered by the Metro District, HRCA and partners with an emphasis on the following:
 - Socialization opportunities
 - Fitness/Wellness
 - General Recreation
 - Social Services

It is recognized that increasing active adult services will likely require the utilization of a number of existing facilities in the community for this purpose. This will necessitate arrangements with the other partner organizations that have facilities (HRCA). Not all of these programs have to be no or low fee. Quality programs and services that are more specialized in nature can command a higher fee.

- Increase the marketing and promotion efforts for active adult services that are being provided by the Highlands Ranch Metro District, HRCA, and other partners. This will require the establishment of an actual marketing plan and a level of on-going funding to support these efforts. Part of this plan should include a quarterly active adult services publication detailing programs and activities available in the community. Another important focus should be a comprehensive web site that will have easy navigation to active adult services.
- With a measurable increase in active adult services as justification, explore the utilization of a temporary facility (3 to 5 years) that can serve as a “home” location for active adult programming and services. This effort should be led by the Metro District with direct involvement with the primary partners. The focus of this building should be supporting more passive uses and basic active adult services in a single level structure with adequate parking in close proximity. This may require 6,000 to 7,000 SF. This building should be open evenings and weekends and when not being used for active adult programs, it should also be utilized for rentals or other general recreation uses. The building should not be programmed or controlled by any one outside organization or agency.

Key spaces to include in a temporary center include:

- Entry/Lobby/Lounge (with coffee area)
- Resource library
- A large multi-purpose space that is divisible into two smaller spaces.
- One classroom

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- A small kitchen area
 - Office and information desk
 - Adequate storage and parking

This effort is likely to require the leasing of commercial or office space in a central location in Highlands Ranch. The possible renovation of existing Metro District properties was examined but none of the facilities listed below was considered viable.

Young House – Located on the grounds of the Mansion, this multi-level house would require extensive renovations and would result in a series of smaller rooms that would be difficult to utilize for more comprehensive active adult services.

Fly'n B – This is a small old farm house where only the first level is useable. There will need to be extensive renovation to the building and there is very little parking.

Highlands Ranch Mansion – While this would be a fine location for active adult programming, this would go against the stated role and purpose of the mansion and would greatly impact its ability to host meetings, private rentals and other events. Parking is adequate but is located a significant distance from the front door.

A temporary building will require another significant increase in funding for not only the building lease but also for the expected increase in programs and services as well as the required staffing.

- Within ten years, develop a true, permanent, Active Adult Center with one of the three scenarios listed below:
 - *Addition to an Existing Recreation Center* - This would be an addition to one of the existing Highlands Ranch Community Association's recreation centers. This will require a formal, long term equity partnership with HRCA to make this concept viable. Capital funding from the Highlands Ranch Metro District as well as from HRCA and even Douglas County should be expected. There will also need to be a substantial operations budget in place that again is shared with the Highlands Ranch Metro District and HRCA. General operations and maintenance should be handled by HRCA as well as general recreation programming while the Highlands Ranch Metro District focuses its efforts on social services.

The active adult “wing” should have its own entrance (with the required parking in close proximity) and control desk but also have direct access to the active use spaces in the recreation center (fitness area, aquatics area, and the gym/track). The active adult

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wing should be open evenings and weekends and when not being used for active adult programs, it should be utilized for rentals or other general recreation uses.

This would be the preferred option as it best meets the needs of active adults with a variety of interests.

Key spaces to include in the active adult wing are:

- Lobby/lounge/Office/Resource Area
- Café Area
- Community Room (divisible)
- Kitchen (catering and teaching)
- Art Room
- Small Library Space
- Media Center (computers)
- Loan Closet

This wing could be 11,000 to 13,000 SF and should all be on the ground level.

- *Attach to Another Community Building* – This could be a building such as a future Cultural Arts Center or a Douglas County government center in Highlands Ranch. The basic program would be the same as what is listed above, but could change slightly based on the type of facility (and its amenities) that it is attached to.

This option is possible as the connection to other possible facilities and services could expand the scope of what is available to active adults. However, at this point there does not appear to be any other viable building to attach to.

- *Stand-alone Active Adult Center* – This would involve the development of a dedicated active adult center in a central location in Highlands Ranch. This type of facility would almost certainly require the expansion of the program to include more active elements.

Key spaces to add to the above program include:

- Group Exercise Room
- Weight Cardio Room
- Gym (small)

A small, program oriented, swimming pool may also need to be considered.

This building could be 25,000 to 30,000 SF and should all be one level.

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A stand-alone active adult center is not recommended as it tends to isolate active adults from other generations and the building will be larger, requiring additional capital and operations funding.

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Section VI – Active Adult Services Action Plan

The following is the recommended action plan for expanding active adult services in Highlands Ranch.

Short-Term Steps

- The Highlands Ranch Metro District makes a long-term commitment to increasing services for active adults in the community.
- The Highlands Ranch Metro District agrees to be the lead and coordinating agency for active adult services in the community in the future.
- The Highlands Ranch Metro District creates and formalizes an *Active Adult Council* made up of agencies that support active adult services in Highlands Ranch. The Council establishes a vision statement with specific goals and organizational bylaws. Specific roles and responsibilities for delivering active adult services for each organization are established.
- Formal partnerships with other organizations are established by the Highlands Ranch Metro District to expand the programming and services for active adults in the future. Clear roles and responsibilities for each of the partners are developed and this includes resource and funding commitments.
- From these first actions, a well defined plan for providing active adult services for the next 10 years is developed with input from the Active Adult Council and approved by the Highlands Ranch Metro District. The plan outlines distinct steps required to increase services for active adults and indicates the required staffing, facilities and funding that is needed to implement the plan.
- Based on the *Active Adult Services Plan*, systematically increase active adult programs and services offered by the Active Adult Council members including the Highlands Ranch Metro District, with an emphasis on the following:
 - Socialization opportunities
 - Fitness/Wellness
 - General Recreation
 - Social Services

To accomplish this will require the utilization of a number of existing facilities in the community most of which are going to be partner organization owned and operated. Not all of these programs have to be no or low fee. The emphasis on expanded or new

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programming should be on providing a wider array of services, at different times and days, and at different fee rates.

- Develop a formal *marketing plan* designed to increase the marketing and promotion efforts for active adult services that are being provided by the Highlands Ranch Metro District, HRCA, and other partners. The plan should include a quarterly active adult services publication detailing programs and activities available in the community and a comprehensive web site.

Anticipated Financial Impact on the Highlands Ranch Metro District -To implement the Short-Term Steps outlined above, the District should be prepared for the following resource commitment.

- The addition of at least a half-time Active Adult Coordinator (\$25,500)
- The addition of \$50,000-\$100,000 a year for operating supplies and services.
- Total financial commitment - \$75,500 to \$125,500 a year.

Mid-Term Steps

- Based on a measurable increase in active adult services as justification, the Highlands Ranch Metro District, along with other primary partners, develops a plan for an interim facility that can serve as a “home” location for active adult programming and services in Highlands Ranch. The plan should identify key components to include in the facility, a preferred location/building, project partners, and the cost to build and operate.
- With a plan, the Highlands Ranch Metro District (and other primary partners) commits to funding the development of an interim *Active Adult Center*.
- This building would support primarily passive uses and basic active adult services in a single level structure with adequate parking in close proximity. The center should be open evenings and weekends and when not being used for active adult programs, it should also be utilized for rentals or other general recreation uses.
- Since this would be an interim Active Adult Center, the best option would be to lease commercial or office space in a central location in Highlands Ranch.

The recommended building program is identified below.

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Interim Adult Activity Center Program

Space	Number	SF	Total
Entry/Lobby/Lounge/Front Desk	1	750	750
Office	1	120	120
Multi-purpose Room (Divisible in Half)	1	2,000	2,000
Classroom	1	900	900
Kitchen	1	200	200
Restrooms	2	200	400
Sub-Total	7	4,370	4,370
Circulation/Storage/Support – 30%			1,311
Total Square Footage			5,681

Capital Costs

- The estimated capital costs for the interim Active Adult Center are identified below (based on 2018 cost estimates).

Capital Assumptions

- The interim building would involve the renovation of an existing building. Cost has been assigned to the entire program area assuming the facility requires tenant improvements over the entire area.
- Costs reflect current construction market conditions and have been escalated through 2018. The costs above are an average opinion of construction costs based upon similar facilities built in the region and other recently constructed centers built nationally and adjusted to the Highlands Ranch market.
- It is assumed that an interim center would have basic site development to support the proposed facility including parking, utilities, lighting and landscaping. Cost includes an allowance for improvements include access and ADA upgrades, additional lighting, landscaping, patio and paving areas, etc.

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Program Statement - Temporary Facility					
	Net Sq. Ft.	\$/SF	Const. Cost	Non-Const. \$	Total Cost
Building Spaces				30.0%	
Entry Lobby/Reception/Lounge	750	\$131	\$98,100	\$29,430	\$127,530
Admin Office	120	\$76	\$9,156	\$2,747	\$11,903
Multi-purpose Room (divisible in half)	2,000	\$76	\$152,600	\$45,780	\$198,380
Classroom (w/storage)	900	\$76	\$68,670	\$20,601	\$89,271
Kitchen	200	\$131	\$26,160	\$7,848	\$34,008
Public Restrooms - Men	200	\$131	\$26,160	\$7,848	\$34,008
Public Restrooms - Women	200	\$131	\$26,160	\$7,848	\$34,008
Sub-Total	4,370				
Mech./Circ./Walls/Struct., etc.	1311	\$44	\$57,160	\$17,148	\$74,307
Bulding Subtotal	5,681	\$82	\$464,166	\$139,250	\$603,415
Site Development					
Parking Improvements			\$15,000	\$4,500	\$19,500
Drop-off modifications and improvements			\$30,000	\$9,000	\$39,000
Landscaping			\$12,000	\$3,600	\$15,600
Plazas, Sidewalks, Patios, etc			\$20,000	\$6,000	\$26,000
Site Lighting			\$8,000	\$2,400	\$10,400
Utilities Allowance			\$15,000	\$4,500	\$19,500
Miscellaneous			\$5,000	\$1,500	\$6,500
Subtotal Site Development Costs			\$105,000	\$31,500	\$136,500
Project Total	5,681	\$100	\$569,166	\$170,750	\$739,915

Operational Costs

- The estimated operational costs and revenues for the interim Active Adult Center are indicated below.

Operational Assumptions

- The first year of operation will be late 2018 or later.
- The center will be operated by the Highlands Ranch Metro District.
- The center will be open to individuals over the age of 50.
- This operations estimate is based on a basic program for the facility only.

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- No partnerships with other organizations have been shown in this operations plan.
- No ongoing use or rental of space in the facility has been shown.
- The center will be contracted cleaned on a daily basis but will be augmented by District staff during the day time and for other events and activities.
- Capital replacement dollars are shown at a minimal level.
- The operating hours of the center are based on being open 6 days a week and some evenings as well.
- The center will assess a \$75 a year “membership fee”. There will also be fees for some programs and services.
- A lease payment for a facility has been included based on \$20 a square foot.

Category	Facility	
Expenses	\$	309,196
Revenues	\$	64,740
Difference	\$	(244,456)
Recovery %		21%

Anticipated Financial Impact on the Highlands Ranch Metro District -To implement the Mid Term Steps outlined above, the District (and its partners) should be prepared for the following resource commitment.

- A capital commitment of \$740,000 for an interim Active Adult Center.
- An operational commitment of \$244,500 annually for an interim Active Adult Center.

Long-Term Steps

- With the successful operation of an interim Active Adult Center for a period of at least 3 years, the Highlands Ranch Metro District, along with other primary partners, completes a plan for a permanent Active Adult Center in Highlands Ranch.

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- With a successful plan, the Highlands Ranch Metro District (and other primary partners) commits to funding the development of a permanent *Active Adult Center*.
- Since the building would support not only passive but active uses, adding the Active Adult Center to an existing recreation center or other public building is recommended.

Active Adult Center-Connected to an Existing Recreation Center

- If the Active Adult Center is connected to an existing recreation center the recommended building program is listed below.

Space	Number	SF	Total
Entry/Lobby/Lounge/Front Desk	1	1,000	1,000
Café Space	1	500	500
Consultation Room	2	200	400
Office	2	120	240
Loan Closet	1	300	300
Library Space	1	400	400
Community Room (Divisible in thirds)	1	3,000	3,000
Art Room	1	900	900
Fitness Room	1	900	900
Media Center	1	900	900
Kitchen (Catering & Teaching)	1	500	500
Restrooms	2	400	800
Sub-Total	15	9,120	9,840
Circulation/Storage/Support – 30%			2,952
Total Square Footage			12,792

Capital Costs

- The estimated capital costs for the permanent Active Adult Center are identified below (based on 2018 cost estimates).

Capital Assumptions

- Connection to an existing building would require more detailed analysis to properly determine accurate costs including foundation and grading design, code separation analysis, and mitigation during connection to demolish and finish the adjoining spaces.

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- Costs reflect current construction market conditions and have been escalated through 2018. The costs above are an average opinion of construction costs based upon similar facilities built in the region and other recently constructed centers built nationally and adjusted to the Highlands Ranch market.
- It is assumed that a connected facility would require some upgrade to site development but would take advantage of existing infrastructure such as parking, utilities and landscaping. Cost includes a budget for improvements including access and ADA upgrades, additional lighting, landscaping, patio and paving areas, etc.

Program Statement -Permanent Center Connected to an Existing Center					
	Net Sq. Ft.	\$/SF	Const. Cost	Non-Const. \$	Total Cost
Building Spaces				30.0%	
Entry Lobby/Reception/Lounge	1,000	\$322	\$321,550	\$96,465	\$418,015
Café Space	500	\$322	\$160,775	\$48,233	\$209,008
Consultation Rooms (2 @ 200sf ea.)	400	\$273	\$109,000	\$32,700	\$141,700
Admin Office (2 @ 120sf ea.)	240	\$273	\$65,400	\$19,620	\$85,020
Loan Closet	300	\$245	\$73,575	\$22,073	\$95,648
Library Space	400	\$273	\$109,000	\$32,700	\$141,700
Multi-purpose Room (divisible in thirds)	3,000	\$273	\$817,500	\$245,250	\$1,062,750
Art Room	900	\$273	\$245,250	\$73,575	\$318,825
Fitness Room	900	\$245	\$220,725	\$66,218	\$286,943
Media Center	900	\$273	\$245,250	\$73,575	\$318,825
Kitchen (catering and teaching)	500	\$322	\$160,775	\$48,233	\$209,008
Public Restrooms - Men	400	\$322	\$128,620	\$38,586	\$167,206
Public Restrooms - Women	400	\$322	\$128,620	\$38,586	\$167,206
Mech./Circ./Walls/Struct., etc.	2952	\$245	\$723,978	\$217,193	\$941,171
Bulding Subtotal	12,792	\$274	\$3,510,018	\$1,053,005	\$4,563,023
Site Development					
Parking (Added Parking for 36 cars)	12,600	\$8	\$100,800	\$30,240	\$131,040
Site Circulation Drives, Drop-Off	3,000	\$12	\$36,000	\$10,800	\$46,800
Landscaping	8,000	\$4	\$28,000	\$8,400	\$36,400
Plazas, Sidewalks, Patios, etc	2,000	\$9	\$18,000	\$5,400	\$23,400
Site Lighting			\$10,000	\$3,000	\$13,000
Utilities Connections			\$80,000	\$24,000	\$104,000
Exiting building connection, demolition, prep, finish			\$75,000	\$22,500	\$97,500
Subtotal Site			\$347,800	\$104,340	\$452,140
project Total	12,792	\$302	\$3,857,818	\$1,157,345	\$5,015,163

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Operational Costs

- The estimated operational costs and revenues for the permanent Active Adult Center are indicated below.

Operational Assumptions

- The first year of operation will be late 2018 or later and the building will be connected to an existing recreation center.
- The center will be operated by the Highlands Ranch Metro District.
- The center will be open to individuals over the age of 50.
- This operations estimate is based on a basic program for the facility only.
- No partnerships with other organizations have been shown in this operations plan.
- No ongoing use or rental of space in the facility has been shown.
- The center will be contracted cleaned on a daily basis but will be augmented by District staff during the day time and for other events and activities.
- Capital replacement dollars are shown at a minimal level.
- The operating hours of the center are based on being open 6 days a week and some evenings as well.
- The center will assess a \$120 a year “membership fee”. There will also be fees for most programs and services.

Category	Facility
Expenses	\$ 434,382
Revenues	\$ 126,560
Difference	\$ (307,822)
Recovery %	29%

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Active Adult Center-Stand-alone

- If the Active Adult Center is constructed as a stand-alone center, then the recommended building program would need to include the following.

Space	Number	SF	Total
Entry/Lobby/Lounge/Front Desk	1	1,000	1,000
Café Space	1	500	500
Consultation Room	2	200	400
Office	3	120	360
Loan Closet	1	300	300
Library Space	1	400	400
Community Room (Divisible in thirds)	1	3,000	3,000
Art Room	1	900	900
Media Center	1	900	900
Kitchen (Catering & Teaching)	1	500	500
Group Exercise Room	1	1,500	1,500
Weight/Cardio Space	1	2,000	2,000
Gymnasium	1	8,000	8,000
Restrooms	2	400	800
Sub-Total	18	19,720	20,560
Circulation/Storage/Support – 30%			6,168
Total Square Footage			26,728

Capital Costs

- The estimated capital costs for the permanent (stand-alone) Active Adult Center are identified below (based on 2018 cost estimates).

Capital Assumptions

- The costs reflect the budget to develop a stand-alone center. Land acquisition costs are not included in the above figures.
- Costs reflect current construction market conditions and have been escalated through 2018. The costs above are an average opinion of construction costs based upon similar facilities built in the region and other recently constructed centers built nationally and adjusted to the Highlands Ranch market.

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- The costs, particularly those for the site development may vary depending on the property selected, including soils conditions, topography, site size and access to utilities, and other site specific considerations.

Program Statement -Permanent Center Free-Standing					
	Net Sq. Ft.	\$/SF	Const. Cost	Non-Const. \$	Total Cost
Building Spaces				30.0%	
Entry Lobby/Reception/Lounge	1,000	\$322	\$321,550	\$96,465	\$418,015
Café Space	500	\$322	\$160,775	\$48,233	\$209,008
Consultation Rooms (2 @ 200sf ea.)	400	\$273	\$109,000	\$32,700	\$141,700
Admin Offices (3 @ 120sf ea.)	360	\$273	\$98,100	\$29,430	\$127,530
Loan Closet	300	\$245	\$73,575	\$22,073	\$95,648
Library Space	400	\$273	\$109,000	\$32,700	\$141,700
Multi-purpose Room (divisible in thirds)	3,000	\$273	\$817,500	\$245,250	\$1,062,750
Art Room	900	\$273	\$245,250	\$73,575	\$318,825
Media Center	900	\$273	\$245,250	\$73,575	\$318,825
Kitchen (catering and teaching)	500	\$322	\$160,775	\$48,233	\$209,008
Group Exercise Room with Storage	1,500	\$273	\$408,750	\$122,625	\$531,375
Weight/Cardio Space	2,000	\$245	\$490,500	\$147,150	\$637,650
Gymnasium	8,000	\$245	\$1,962,000	\$588,600	\$2,550,600
Public Restrooms - Men	400	\$322	\$128,620	\$38,586	\$167,206
Public Restrooms - Women	400	\$322	\$128,620	\$38,586	\$167,206
Mech./Circ./Walls/Struct., etc.	6168	\$245	\$1,512,702	\$453,811	\$1,966,513
Building Subtotal	26,728	\$261	\$6,971,967	\$2,091,590	\$9,063,557
Site Development					
New Parking Lot (Parking for 52 cars)	18,200	\$8	\$145,600	\$43,680	\$189,280
Site Circulation Drives, Drop-Off	5,000	\$12	\$60,000	\$18,000	\$78,000
Landscaping	20,000	\$3	\$60,000	\$18,000	\$78,000
Plazas, Sidewalks, Patios, etc	5,000	\$9	\$45,000	\$13,500	\$58,500
Site Lighting			\$20,000	\$6,000	\$26,000
Utilities Development Allowance			\$200,000	\$60,000	\$260,000
Miscellaneous			\$40,000	\$12,000	\$52,000
Site Development			\$570,600	\$171,180	\$741,780
Building Subtotal	26,728		\$7,542,567	\$2,262,770	\$9,805,337

Indoor Pool (Optional)					
Pool Enclosure natatorium	4,000	\$475	\$1,900,000	\$570,000	\$2,470,000
Pool surface area	2,000	\$350	\$700,000	\$210,000	\$910,000
Locker Rooms and change rooms	1,600	\$350	\$560,000	\$168,000	\$728,000
Offices, storage and mechanical rooms	1,000	\$300	\$300,000	\$90,000	\$390,000
Mech./Circ./Walls/Struct., etc.	2580	\$300	\$774,000	\$232,200	\$1,006,200
Indoor Pool Subtotal Costs	9,180	\$461	\$4,234,000	\$1,270,200	\$5,504,200

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Operational Costs

- The estimated operational costs and revenues for the permanent Active Adult Center (no pool) are indicated below.

Operational Assumptions

- The first year of operation will be late 2018 or later and the building will be a stand-alone center without a pool.
- The center will be operated by the Highlands Ranch Metro District.
- The center will be open to individuals over the age of 50.
- This operations estimate is based on a basic program for the facility only.
- No partnerships with other organizations have been shown in this operations plan.
- No ongoing use or rental of space in the facility has been shown.
- The center will be contracted cleaned on a daily basis but will be augmented by District staff during the day time and for other events and activities.
- Capital replacement dollars are shown at a minimal level.
- The operating hours of the center are based on being open 7 days a week and some evenings as well.
- The center will assess use and membership fees that reflect a more active based center. There will also be fees for most programs and services.

Category	Facility	
Expenses	\$	862,688
Revenues	\$	489,654
Difference	\$	(373,034)
Recovery %		57%

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Anticipated Financial Impact on the Highlands Ranch Metro District -To implement the Long-Term Steps outlined above, the District (and its partners) should be prepared for the following resource commitment.

Active Adult Center-Connected to an Existing Recreation Center

- A capital commitment of \$5 million for a permanent Active Adult Center.
- An operational commitment of \$308,000 for a permanent Active Adult Center.

Active Adult Center-Stand-alone (no pool)

- A capital commitment of \$10 million for a permanent Active Adult Center.
- An operational commitment of \$373,000 for a permanent Active Adult Center.

Section VII – Appendix

Active Adult Activity Participation and Trends



Active Adult Activity Participation and Trends

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sport activities for active adults.

Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto Highlands Ranch Metro District to determine market potential. The information contained in this section of the report, utilizes the NSGA’s most recent survey. For that data was collected in 2016 and the report was issued in May of 2017.

B*K takes the national average and combines that with participation percentages of Highlands Ranch Metro District based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage when applied to the population of Highlands Ranch Metro District then provides an idea of the market potential for various activities.

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Recreation Related Activities Participation: These are active recreation activities that Highlands Ranch active adults could take participate in.

Table A –Participation Rates for Highlands Ranch Metro District

	Age	Income	Region	Nation	Average
Aerobics	14.8%	18.4%	14.1%	15.5%	15.7%
Basketball	1.2%	11.4%	7.8%	8.4%	7.2%
Bicycle Riding	8.8%	15.7%	14.4%	12.3%	12.8%
Billiards/Pool	4.2%	7.0%	5.5%	7.2%	6.0%
Bowling	5.8%	13.0%	13.4%	11.8%	11.0%
Exercise Walking	43.3%	35.5%	35.0%	36.0%	37.4%
Exercise w/ Equipment	18.6%	19.9%	18.3%	19.5%	19.1%
Golf	18.6%	9.8%	7.0%	6.3%	7.7%
Martial Arts	0.5%	2.3%	1.6%	2.1%	1.6%
Pilates	0.2%	2.1%	1.9%	1.9%	1.5%
Running/Jogging	5.2%	19.6%	15.1%	15.3%	13.8%
Swimming	12.5%	20.1%	16.8%	15.5%	16.2%
Table Tennis	1.7%	5.2%	2.6%	3.5%	3.3%
Tennis	2.0%	6.5%	3.3%	4.3%	4.0%
Weight Lifting	8.4%	13.9%	11.5%	12.1%	11.5%
Workout @ Club	10.4%	15.9%	13.0%	12.9%	13.3%
Yoga	6.1%	14.3%	10.3%	10.3%	10.3%
DNP	25.3%	20.9%	18.8%	22.4%	21.8%

- Age:** Participation based on individuals ages 55 & Up of Highlands Ranch Metro District.
- Income:** Participation based on the 2017 estimated median household income in Highlands Ranch Metro District.
- Region:** Participation based on regional statistics (Mountain).
- National:** Participation based on national statistics.
- Average:** Average of the four columns.

Note: “Did Not Participate” refers to all 55 activities tracked by the NSGA.

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Table B –Active Adult Participation Rates for Active Recreation Activities

	55-64	65-74	75+
Aerobics	15.8%	15.7%	9.3%
Basketball	1.8%	0.6%	0.0%
Bicycle Riding	11.1%	7.1%	3.9%
Billiards/Pool	5.4%	2.8%	2.4%
Bowling	7.2%	4.1%	3.9%
Exercise Walking	44.9%	42.4%	39.1%
Exercise w/ Equipment	19.4%	18.7%	15.5%
Golf	7.9%	7.1%	6.9%
Martial Arts	0.7%	0.3%	0.0%
Pilates	1.6%	1.0%	0.7%
Running/Jogging	7.1%	3.3%	2.2%
Swimming	13.6%	11.9%	9.5%
Table Tennis	2.0%	1.6%	1.0%
Tennis	2.5%	1.5%	1.0%
Weight Lifting	9.9%	7.6%	4.2%
Workout @ Club	10.6%	10.9%	8.8%
Yoga	7.5%	5.0%	3.3%
DNP	25.6%	24.1%	26.2%

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Anticipated Participation Number: Utilizing the average percentage from Table-A above plus the 2010 census information and census estimates for 2017 and 2022 (over age 55) the following comparisons are available.

Table C –Participation Growth or Decline

	Average	2010 Population	2017 Population	2022 Population	Difference
Aerobics	15.7%	2,307	3,357	4,122	1,815
Basketball	7.2%	1,058	1,539	1,890	832
Bicycle Riding	12.8%	1,882	2,738	3,362	1,480
Billiards/Pool	6.0%	878	1,277	1,569	691
Bowling	11.0%	1,617	2,353	2,889	1,272
Exercise Walking	37.4%	5,505	8,011	9,837	4,332
Exercise w/ Equipment	19.1%	2,804	4,081	5,011	2,206
Golf	7.7%	1,125	1,637	2,011	885
Martial Arts	1.6%	238	346	425	187
Pilates	1.5%	224	326	400	176
Running/Jogging	13.8%	2,030	2,955	3,628	1,598
Swimming	16.2%	2,385	3,470	4,261	1,876
Table Tennis	3.3%	479	697	856	377
Tennis	4.0%	591	860	1,056	465
Weight Lifting	11.5%	1,685	2,453	3,012	1,326
Workout @ Club	13.1%	1,919	2,792	3,429	1,510
Yoga	10.3%	1,508	2,194	2,695	1,187
DNP	21.8%	3,211	4,672	5,737	2,526

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The “Did Not Participate” statistics refers to all 55 activities outlined in the NSGA 2016 Survey Instrument.

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Participation by Ethnicity and Race: The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2016 survey, the following comparisons are possible.

Table D – Comparison of National, African American and Hispanic Participation Rates

Indoor Activity	Highlands Ranch Metro Dist.	National Participation	African American Participation	Hispanic Participation
Aerobics	15.7%	15.5%	13.9%	14.6%
Basketball	7.2%	8.4%	12.8%	10.2%
Bicycle Riding	12.8%	12.3%	9.3%	12.4%
Billiards/Pool	6.0%	7.2%	6.7%	9.3%
Bowling	11.0%	11.8%	12.2%	13.2%
Exercise Walking	37.4%	36.0%	32.5%	30.5%
Exercise w/ Equipment	19.1%	19.5%	17.5%	18.4%
Golf	7.7%	6.3%	2.1%	4.9%
Martial Arts	1.6%	2.1%	1.9%	3.2%
Pilates	1.5%	1.9%	2.2%	2.6%
Running/Jogging	13.8%	15.3%	14.6%	17.3%
Swimming	16.2%	15.5%	9.3%	14.1%
Table Tennis	3.3%	3.5%	2.9%	3.4%
Tennis	4.0%	4.3%	3.3%	4.9%
Weight Lifting	11.5%	12.1%	13.9%	11.2%
Workout @ Club	13.1%	12.9%	10.9%	13.1%
Yoga	10.3%	10.3%	9.3%	11.5%
DNP	21.8%	22.4%	26.3%	23.6%

Primary Service Part: The unique participation percentage developed for Highlands Ranch Metro District.
National Rate: The national percentage of individuals who participate in the given activity.
African American Rate: The percentage of African-Americans who participate in the given activity.
Hispanic Rate: The percentage of Hispanics who participate in the given activity.

There is Hispanic population of 8.4% in Highlands Ranch Metro District. As such these numbers play a factor with regards to overall participation.

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Summary of Active Recreation Participation: The following chart summarizes participation for indoor activities utilizing information from the 2016 National Sporting Goods Association survey.

Table E – Active Recreation Participation Summary

Activity	Nat'l Rank ⁵	Nat'l Participation (in millions)
Exercise Walking	1	105.7
Exercising w/ Equipment	2	57.1
Swimming	3	45.6
Aerobic Exercising	4	45.6
Running/Jogging	5	44.9
Hiking	6	42.9
Camping	7	40.4
Workout @ Club	8	37.8
Bicycle Riding	9	36.2
Weight Lifting	10	35.6
Bowling	11	34.7
Yoga	12	30.3
Billiards	15	21.3
Tennis	21	12.6
Table Tennis	25	10.2
Martial Arts/MMA	36	6.2
Pilates	41	5.5

Nat'l Rank: Popularity of activity based on national survey.
Nat'l Participation: Percent of population that participate in this activity on national survey.

⁵ This rank is based upon the 55 activities reported on by NSGA in their 2016 survey instrument.

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Participation by Age Group: Within the NSGA survey, participation is broken down by age groups. As such B*K can identify the top 3 age groups participating in the activities reflected in this report.

Chart F – Participation by Age Group:

Activity	Largest	Second Largest	Third Largest
Aerobics	25-34	35-44	45-54
Basketball	12-17	7-11	18-24
Bicycle Riding	7-11	12-17	35-44
Billiards/Pool	25-34	18-24	35-44
Bowling	7-11	12-17	25-34
Exercise Walking	45-54	55-67	75+
Exercise w/ Equipment	25-34	45-54	18-24
Golf	55-64	35-44	75+
Martial Arts	7-11	12-17	18-24
Pilates	25-34	35-44	18-24
Running/Jogging	25-34	18-24	12-17
Swimming	7-11	12-17	35-44
Table Tennis	12-17	18-24	25-34
Tennis	12-17	25-34	35-44
Weight Lifting	25-34	18-24	35-44
Workout @ Club	25-34	18-24	35-44
Yoga	25-34	18-24	35-44

Largest: Age group with the highest rate of participation.
Second Largest: Age group with the second highest rate of participation.
Third Largest: Age group with the third highest rate of participation.

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Market Potential Index for Adult Participation: In addition to examining the participation numbers for various indoor activities through the NSGA 2016 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in Highlands Ranch Metro District.

Table G – Market Potential Index for Adult Participation in Activities

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobics	8,466	11.9%	144
Basketball	6,039	8.5%	100
Bicycle Riding	9,404	13.2%	129
Bowling	8,333	11.7%	122
Exercise Walking	24,365	34.2%	127
Golf	8,899	12.5%	143
Pilates	2,737	3.8%	144
Running/Jogging	14,853	20.8%	155
Swimming	14,041	19.7%	126
Tennis	4,498	6.3%	166
Weight Lifting	10,552	14.8%	146
Yoga	7,849	11.0%	144

- Expected # of Adults:** Number of adults, 18 years of age and older, participating in the activity in Highlands Ranch Metro District.
- Percent of Population:** Percent of the service area that participates in the activity.
- MPI:** Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the activities listed is greater than the national number of 100 in all instances.

Active Recreation Participation Trends: Below are listed a number of activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2007-2016).

Table H – National Activity Trend (in millions)

Increasing in Popularity

	2007 Participation	2016 Participation	Percent Change
Yoga	10.7	30.3	183.2%
Running/Jogging	30.4	44.9	47.7%
Aerobic Exercising	34.8	45.6	31.0%
Exercise Walking	89.8	105.7	17.7%
Weight Lifting	33.2	35.6	7.2%
Basketball	24.1	24.8	2.9%
Workout @ Club	36.8	37.8	2.7%
Tennis	12.3	12.6	2.4%

Decreasing in Popularity

	2007 Participation	2016 Participation	Percent Change
Bicycle Riding	37.4	36.2	-3.2%
Volleyball	12.0	10.7	-10.8%
Swimming	52.3	45.6	-12.8%
Golf	22.7	18.5	-18.5%
Bowling	43.5	34.7	-20.2%
Softball	12.4	9.6	-22.3%
Table Tennis	13.3	10.2	-23.3%

2016 Participation: The number of participants per year in the activity (in millions) in the United States.

2007 Participation: The number of participants per year in the activity (in millions) in the United States.

Percent Change: The percent change in the level of participation from 2007 to 2016.



Non-Active Recreation Participation Statistics: It is important to examine participation rates in non-active recreation activities as well. While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States. It tracks various arts activities that Americans (aged 18 and over) report having done in the course of a year. It also asks questions about adults' preferences for different kinds of music, and it seeks to understand participation in non-arts leisure events such as sports and exercise, outdoor activities and civic and social affairs.

The participation numbers for these activities are national numbers and the information falls into the following categories:

- Visual & Performing Arts Attendance
- Arts Consumption Through Electronic Media
- Creating, Performing and Sharing Art
- Participation in Arts Learning Activities
- Reading and Film Attendance

Visual & Performing Arts Attendance

Table I – Percentage of U.S. Adult Attending a Performing Arts Activity at Least Once in the Past 12-Months

Music	2002	2008	2012	Rate of Change	
				2002-2008	2008-2012
Jazz	10.8%	7.8%	8.1%	-3.0%	+0.3%
Classical Music	11.6%	9.3%	8.8%	-2.3%	-0.5%
Opera	3.2%	2.1%	2.1%	-1.1%	+0.0%
Latin Music	Not Asked	4.9%	5.1%	NA	+0.2%
Outdoor Performing Arts Festival	Not Asked	20.8%	20.8%	NA	+0.0%

Plays	2002	2008	2012	Rate of Change	
				2002-2008	2008-2012
Musical Plays	17.1%	16.7%	15.2%	-0.4%	-1.5%
Non-Musical Plays	12.3%	9.4%	8.3%	-2.9%	-1.1%

Dance	2002	2008	2012	Rate of Change	
				2002-2008	2008-2012
Ballet	3.9%	2.9%	2.7%	-1.0%	-0.2%
Other Dance	6.3%	5.2%	5.6%	-1.1%	+0.4%

- Following a sharp decline in overall arts attendance that occurred from 2002-2008, participation rates held steady from 2008-2012.
- Changes in the U.S. demographic composition appear to have contributed to the overall declines in performing arts attendance. Still, various subgroups of Americans have maintained or increased attendance rates for individual art forms.

Table J – Percentage of U.S. Adults Attending Visual Arts Activities or Events

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Art Museums/Galleries	26.5%	22.7%	21.0%	-3.8%	-1.7%
Parks/Historical Buildings	33.4%	24.5%	22.4%	-8.9%	-2.1%
Craft/Visual Arts Festivals	31.6%	24.9%	23.9%	-6.7%	-1.0%

Table K – Percentage of Adults Attending Live Music Performance by Genre in the Past 12-Months

Genre	Percentage
Jazz	15.9%
Latin	9.1%
Classical	18.2%
Opera	4.8%
Hymns	14.2%
Country	20.2%
Rap	8.7%
Blues	13.1%
Folk	9.8%
Pop/Rock	43.6%

- Visual arts attendance has declined significantly since 2002.
- These 10-year declines were experienced by all demographic subgroups, with one exception; the nation’s oldest Americans (75+) were more likely to attend visual arts activities than a decade ago.

Arts Consumption Through Electronic Media

Table L – Percentage of Adults Who Watched or Listened to an Arts Broadcast or Recording At least Once the Past 12-Months via TV/Radio or Internet

	TV or Radio	Internet	Both
Jazz	9.6%	5.2%	11.8%
Latin, Spanish, or Salsa	10.5%	5.4%	12.6%
Classical	11.7%	5.8%	13.6%
Opera	3.6%	1.5%	4.3%
Other Music ⁶	40.1%	24.9%	46.9%
Theater Productions (musical or stage play)	6.2%	2.1%	7.1%
Ballet, Modern, or Contemporary	3.9%	1.3%	4.5%
Other Dance Programs or Shows	8.3%	2.2%	9.2%
Programs or Info. About Visual Arts	7.6%	4.1%	9.4%
Programs or Info. About Books or Writers	7.5%	5.3%	10.0%
Other Books, Stories, or Poetry Read Aloud	3.8%	4.6%	7.1%

Table M – Percentage of U.S. Adults Who Used Mobile or Handheld Devices to Explore the Arts: 2012

	Percentage
US Adult Population Used Mobile/Handheld Device for Any Reason	53.2%
Read, Listen, Download any Novel, Short Story, Poetry or Plays	16.0%
Watch, Listen, or Download Any Music	3.4%
Download or View Any Visual Arts	7.9%

- Americans were more likely to watch or listen to broadcast arts performances using traditional sources such as TV and radio than the Internet.
- Nearly half of all American adults watched or listened to a broadcast or recorded performance of rock, pop, country, folk, rap or hip-hop music in 2012.
- Over two-thirds of people watching dance performances via median in 2012 were women. Nearly three-quarters of the adult audience was 25-64.

⁶ Rock, pop, country, folk, rap or hip-hop



Creating, Performing and Sharing Art

Table N – Percentage of American Adults Engaging in the Performing Arts: 2012

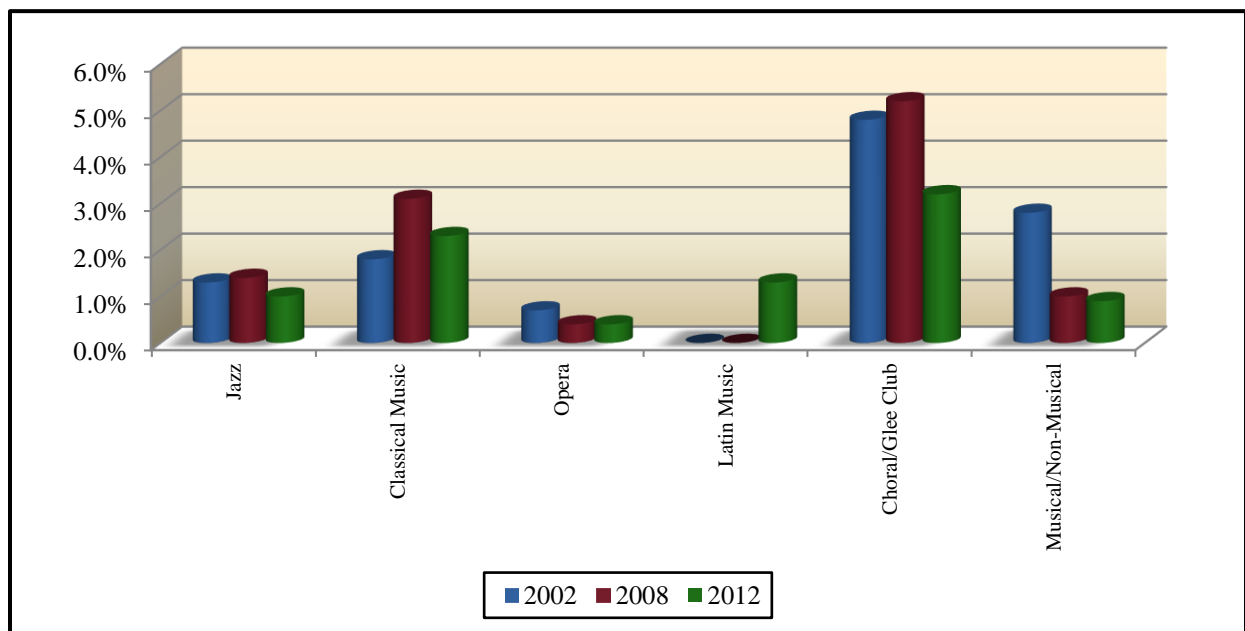
	Percentage
Play a Musical Instrument	12.1%
Play a Musical Instrument (with others)	5.1%
Do Any Acting	1.4%
Do Any Social Dancing	31.6%
Do Any Formal Dancing	5.1%
Perform or Practice Singing	8.7%
Do Any Singing w/ Other People	6.8%

- Social dancing is the most common way Americans performed art in 2012, followed by playing a musical instrument.
- Women are more likely than men to dance. The rates of dance participation are highest for young adults (18-34) and increase with educational level and family income.

Table O – Percentage of Adults Who Practiced or Performed Music of Various Types

Practiced or Performed				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Jazz	1.3%	1.4%	1.0%	+0.1%	-0.4%
Classical Music	1.8%	3.1%	2.3%	+1.3%	-0.8%
Opera	0.7%	0.4%	0.4%	-0.3%	+0.0%
Latin Music	N/A	N/A	1.3%	N/A	N/A
Choral or Glee Club	4.8%	5.2%	3.2%	+0.4%	-2.0%
Musical or Non-Musical	2.8%	1.0%	0.9%	-1.8%	-0.1%

Chart A – Percentage of U.S. Adult Population Attending Arts Performances:



- The percentage of American adults who performed or practiced jazz, classical music, or opera has not changed much since 2002.
- The percentage of people in a choral or glee club or who performed in a musical or non-musical stage play has declined since 2002.



Table P – Percentage of Adults Creating or Performing Arts During the Last 12 Months

	Percentage
Music	5.0%
Dance	1.3%
Films/Videos	2.8%
Photos	12.4%
Visual Arts	5.7%
Scrapbooks	6.5%
Creative Writing	5.9%

Table Q – Percentage of U.S. Adults Using Electronic Media to Create or Perform Art in the Past 12 Months by Art Form

	Percentage
Recorded, Edited, or Remixed Music	4.4%
Recorded, Edited or Remixed Dance	0.9%
Recorded, Edited or Remixed Films or Videos	2.2%
Edited Photos	13.0%

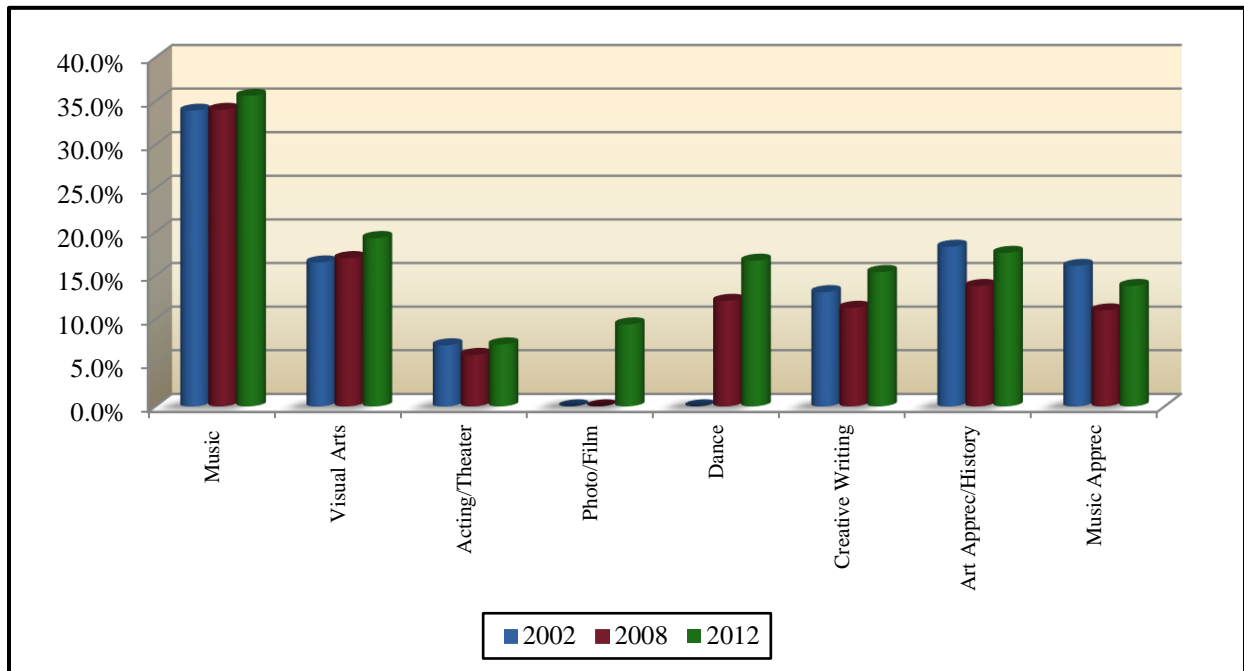
- 19% of American adults in 2012 used electronic media to share art that they themselves had created, edited or remixed.
- Men are more likely than women to use electronic media to create, perform, or share yet. This pattern stands in contrast to most forms of arts participation, in which women typically lead men.
- Large proportions of adults who create music or visual art do so through electronic media.
- 12% of Americans take photographs for artistic purposes, making photography the most common form of arts creation.

Participation in Arts Learning Activities

Table R – Percentage of U.S. Adults Who Took Arts Lessons or Classes During their Lifetime by Form of Art Studied

	Rate of Change				
	2002	2008	2012	2002-2008	2008-2012
Music	33.9%	34.0%	35.6%	+0.1%	+1.6%
Visual Arts	16.5%	17.0%	19.3%	+0.5%	+2.3%
Acting or Theater	7.0%	5.9%	7.1%	-1.1%	+1.2%
Photography or Film	N/A	N/A	9.4%	N/A	N/A
Dance	N/A	12.1%	16.7%	N/A	+4.6%
Creative Writing	13.1%	11.3%	15.4%	-1.8%	+4.1%
Art Après. or History	18.3%	13.8%	17.6%	-4.5%	+3.8%
Music Appreciation	16.1%	11.0%	13.8%	-5.1%	+2.8%

Chart B – Percentage of U.S. Adult Population Attending Arts Performances:

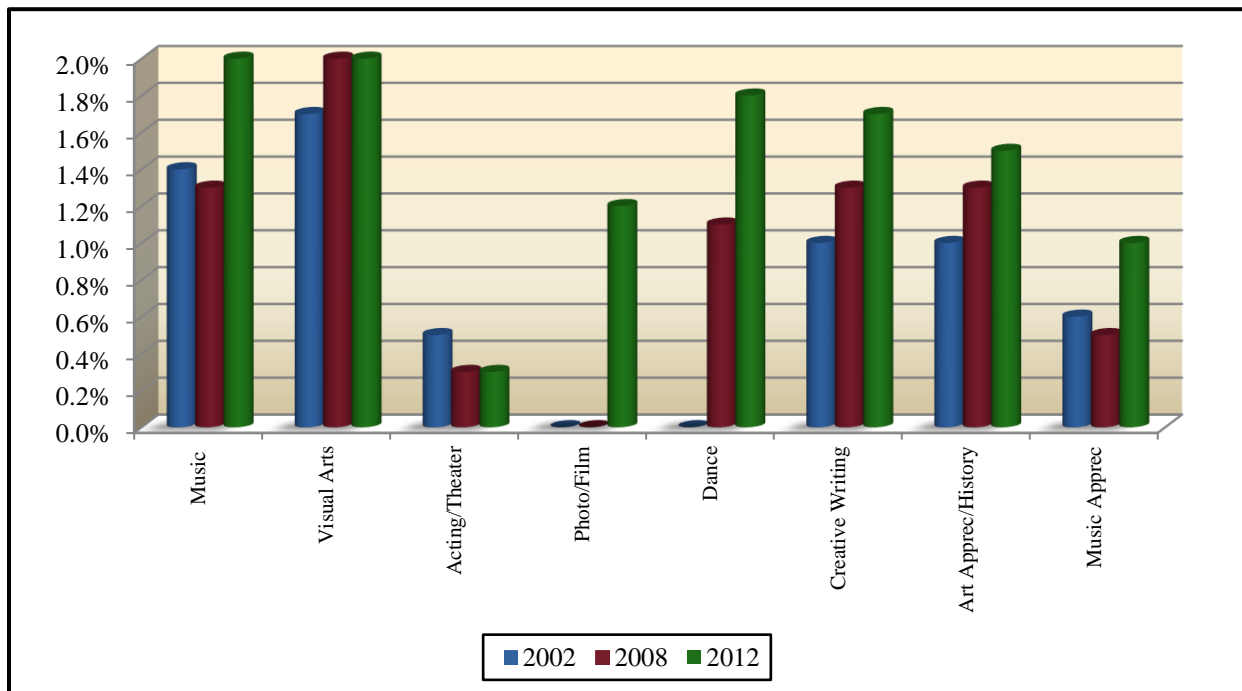


- Music is the art form most commonly studied, whether through voice-training or learning to play an instrument.

Table S – Percentage of U.S. Adults Who Took Arts Lessons or Classes During the Past 12-Monts

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Music	1.4%	1.3%	2.0%	-0.1%	+0.7%
Visual Arts	1.7%	2.0%	2.0%	+0.3%	+0.0%
Acting or Theater	0.5%	0.3%	0.3%	-0.2%	+0.0%
Photography or Film	N/A	N/A	1.2%	N/A	N/A
Dance	N/A	1.1%	1.8%	N/A	+0.7%
Creative Writing	1.0%	1.3%	1.7%	+0.3%	+0.4%
Art Apprec. or History	1.0%	1.3%	1.5%	+0.3%	+0.2%
Music Appreciation	0.6%	0.5%	1.0%	-0.1%	+0.5%

Chart C – Percentage of U.S. Adult Population Attending Arts Performances:



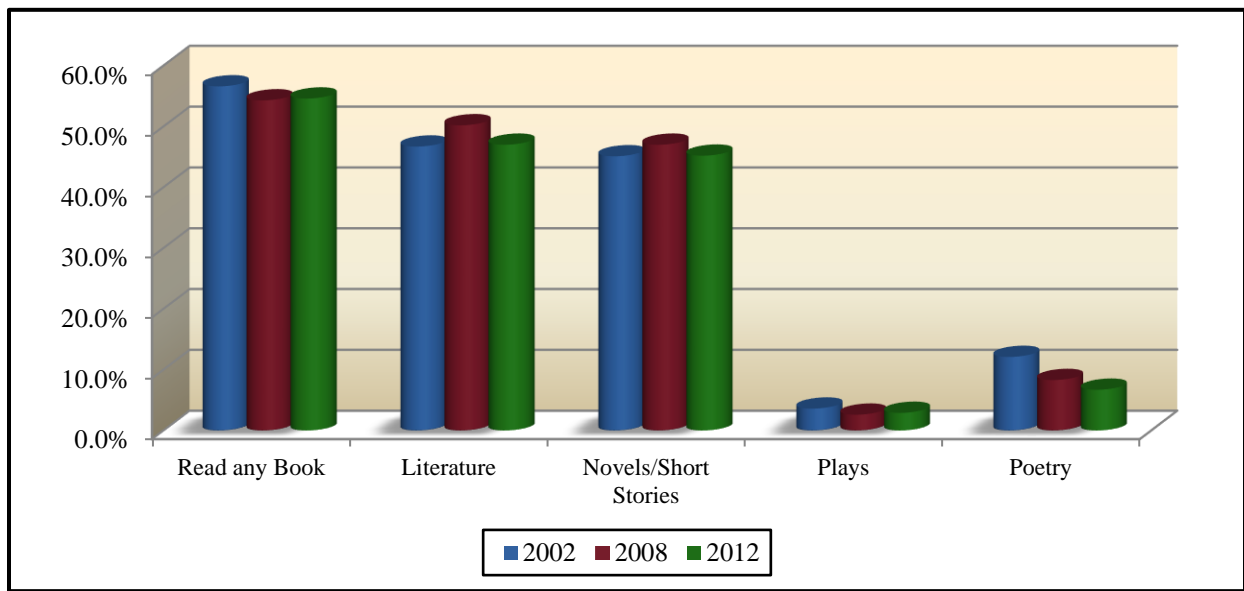
- Childhood experience in the arts is significantly associated with educational level obtained in adulthood. Over 70% of college graduates said they visited an art museum or gallery as a child, compared with 42% of adults who have only a high school diploma.

Reading and Film Attendance

Table T – Reading Activity

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Read any Book, non-required	56.6%	54.3%	54.6%	-2.3%	+0.3%
Literature	46.7%	50.2%	47.0%	+3.5%	-3.2%
Novels or Short Stories	45.1%	47.0%	45.2%	+1.9%	-1.8%
Plays	3.6%	2.6%	2.9%	-1.0%	+0.3%
Poetry	12.1%	8.3%	6.7%	-3.3%	-1.6%

Chart D – Reading Activity

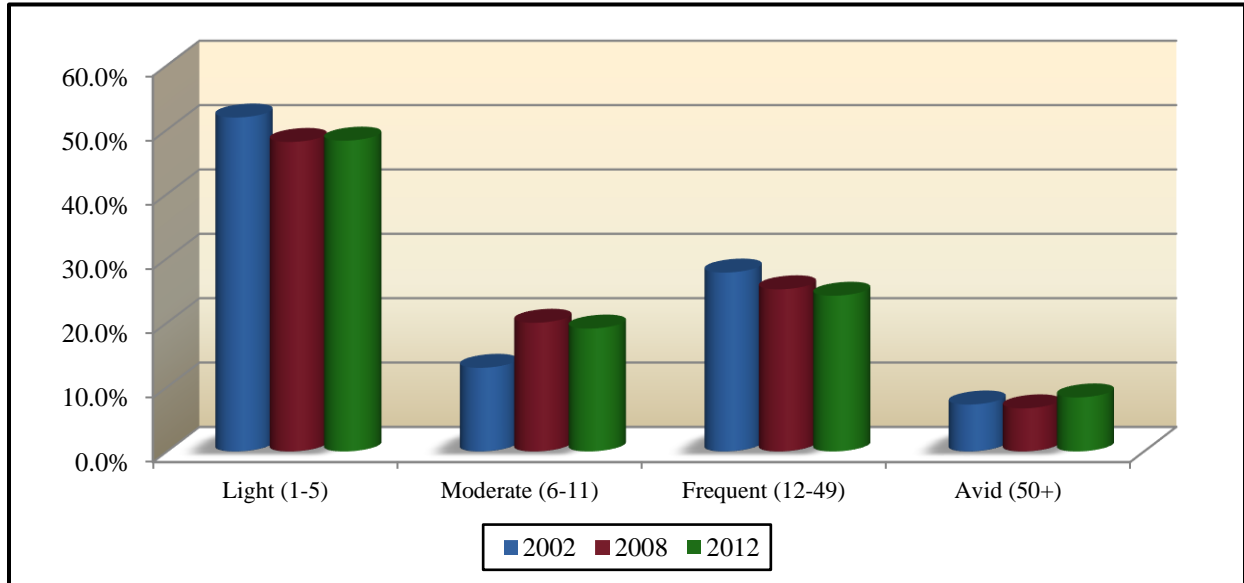


- Women are far more likely to read books or literature than are men.
- Men are more likely to read nonfiction than fiction, while the opposite is true for women.
- Reading of books and literature has increased among older adults in the past decade.

Table U – Percentage of U.S. Adults who Read During the Past 12 Months by Frequency (number of books read):

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
All Adults					
Light (1-5)	29.4%	26.1%	23.4%	-3.3%	-2.7%
Moderate (6-11)	7.4%	10.9%	10.4%	+3.5%	-0.5%
Frequent (12-49)	15.7%	13.7%	13.2%	-2.0%	-0.5%
Avid (50+)	4.1%	4.6%	4.6%	+0.5%	+0.0%
All Book Readers					
Light (1-5)	51.9%	48.1%	48.3%	-3.8%	+0.2%
Moderate (6-11)	13.0%	20.0%	19.1%	+7.0%	-0.9%
Frequent (12-49)	27.8%	25.2%	24.2%	-2.6%	-1.0%
Avid (50+)	7.3%	6.7%	8.4%	-0.6%	+1.7%

Chart E – All Book Readers Rate of Consumption



- Over half of American adults read at least one book in 2012. This is unchanged from 2008, but in 2002 slightly more adults read books.
- About 4% of adults belonged to a book club or reading group in 2012.