

Turfway Entertainment Management Group



**To Modernize, Expand or Build.**

**The Next Steps....**

**How to Analyze the Location, Demographics,  
Attraction selection and Competition to  
Minimize Risk**

A woman with long, curly, light brown hair is sitting at a wooden table. She is wearing a white button-down shirt over a dark top. Her hands are pressed against her temples, and her eyes are closed with a pained or frustrated expression. The background is a blurred indoor setting, possibly a cafe or office, with wooden chairs and tables. The overall lighting is dim and warm. A semi-transparent dark green bar is at the bottom of the image, containing white text.

**Here's what you can expect...**

# About Me

## Dave Wallace

### Founder and President of Turfway

- ✓ 29+ Years of Experience in Operations
- ✓ 13 Years of Consulting Experience
- ✓ Team of Experienced Multi-venue Operators Including Operations, Brand Development, Culinary, and Bar Services.



# What We Do

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- ✓ Feasibility Studies
- ✓ Business Plan Creation
- ✓ Full Concept Creation
- ✓ Operations P&L Pro Forma
- ✓ Operation's Business Analysis
- ✓ Systems Implementation
- ✓ Equipment and Attraction Procurement
- ✓ Equipment and Business Sales
- ✓ Facility Design and Layout Liason
- ✓ Food Service/Restaurant Implementation
- ✓ Staffing and Training
- ✓ Business Review and Action Planning
- ✓ Contract Negotiations
- ✓ Financial/Funding Assistance



**RED STICK**  
THE SOCIAL











A photograph of a restaurant at night. The building is illuminated with green neon lights along the roofline and white string lights. The restaurant has a balcony with tables and umbrellas. In the foreground, there is a hand-drawn orange sign that says "Zimmerman" in a cursive font. The sign is enclosed in a rectangular frame with a horizontal line above the text. To the right of the sign is a green hand-drawn house icon. There are white arrows pointing left and right on the left and right sides of the sign, respectively. The word "SOCIAL" is partially visible at the bottom of the image.

Zimmerman

SOCIAL



# 4 Focus Points to Find a Fit

**1**

**Location**

**2**

**Ranking  
Competition**

**3**

**Age  
Matters!**

**4**

**Attraction Mix**



# 1 Location



Salty Social FEC - Ft Myers Beach

2106041GR • 09.02.2022



**“YOUR BRAND IS WHAT  
OTHER PEOPLE SAY ABOUT  
YOU WHEN YOU'RE NOT IN  
THE ROOM.”**

**-Jeff Bezos**

# Who You Want to Be Can Help in Determining your Location.

## Everything Matters



- ✓ What age range to target?
- ✓ Where is your location?
- ✓ What size facility?
- ✓ What food + beverage program?
- ✓ What are event expectations?
- ✓ What attractions?
- ✓ What is your budget?



*You can't satisfy everybody,*

**FOCUS ON THINGS WHERE YOU ARE  
THE BEST**



# Key Considerations

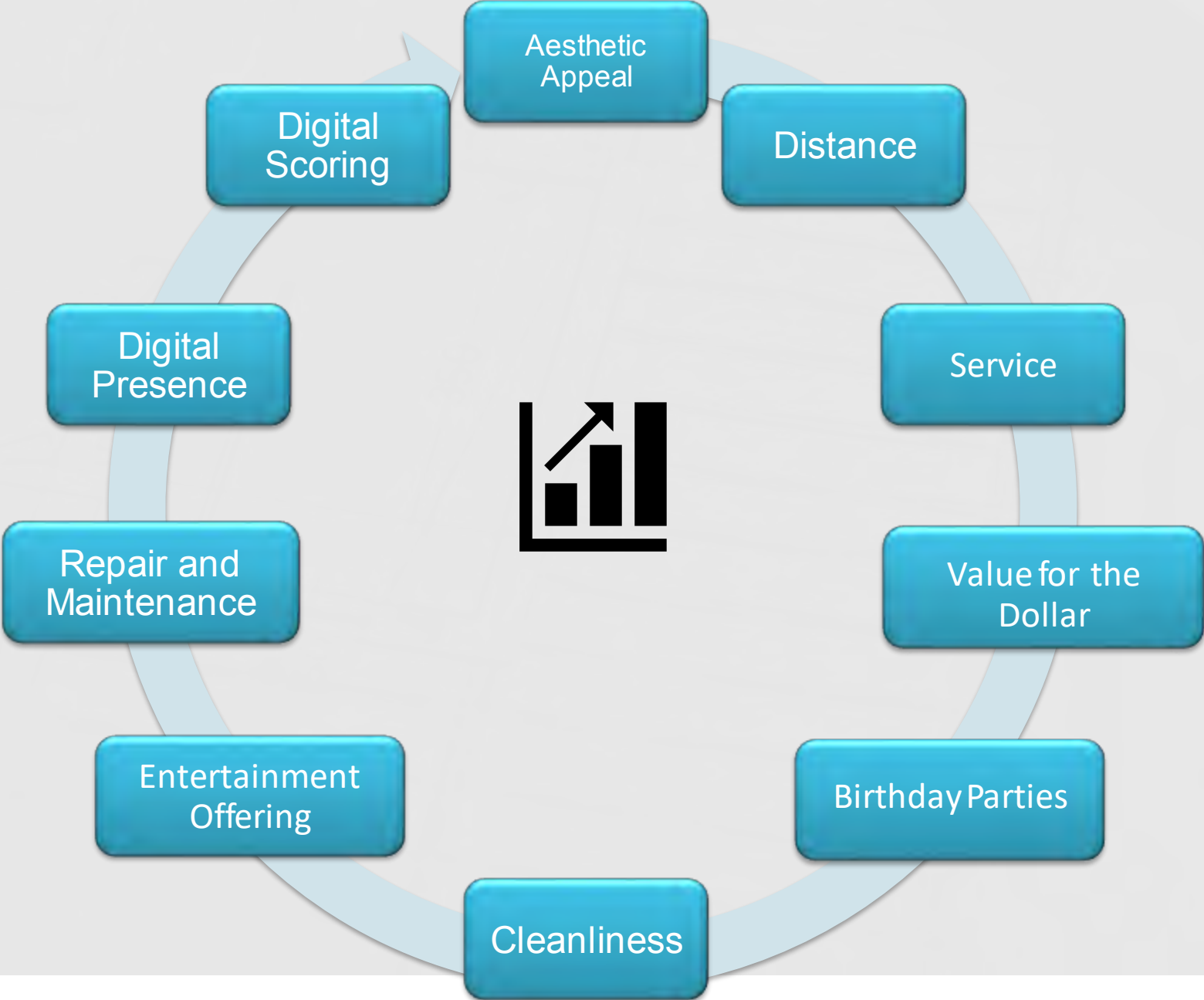
- 20-minute drive represents 70% of return loyal guests.
- 2.9 times repeat business for relevant target audience. Good food and promotions opportunity drives results up to 8-10 visits annually
- AAA location vs off the beaten path
- Location MUST be safe!
- Restrictive clauses for specific location
- Restrictive clauses for master development
- General cost of marketing to get the same results
- Condition of the building can drive up costs!
- Landlord work and TI dollars
- TI dollars vs purchasing the building
- SBA 504 (fixed) vs SBA 7a (variable)
- SBA 504 equity needs - 15%
- SBA 7a equity needs - 30%

# Key Considerations

- Different attractions work better with other attractions. Synergy is very important for location selection. (suburb, downtown, gentrified area, college)
- Just because there is nothing there to do in your market does not mean a center will work.
- You can't be something for everyone AND location can drive this more than you think.
- Trends, fads, and single-focused entertainment is one of the most challenging opportunities for long-term sustainability.
- Size matters!
- Facebook polls  $\neq$  Feasibility

# 2 Ranking Competition

# Critical Factors in Understanding your Environment





**COMPETITIVE INTRUSION  
RATING**

	1	2	3	4	5	6	7	8	9	10	Total
Overall Design Aesthetics				x							
Service						x					
Birthday Parties			x								
Repair and Maintenance					x						
Cleanliness				x							
Entertainment Offering				x							
Location									x		
Digital presence								x			
Digital rating							x				
Value for dollar						x					
<b>Total</b>	<b>Axe Throwing, Restaurant and Bar, Parties, Events - Distance 1.5 Miles</b>										<b>5.6</b>

The competitive intrusion analysis reveals low competition within and up to 30 minutes' drive (up to 25 miles) of the proposed site. I took into consideration (mostly) an approximate 25-minute drive time from the proposed location due to the density of the general area and lack of entertainment options along with the traffic throughout time.

Based on observations and research of the facilities mentioned, it was determined that there is low competition within the market and throughout the Piqua area. Due to pricing, distance, density of the population, location of the opportunity and traffic conditions, TEMG believes that there will be very little competition for a new modern entertainment center build of this magnitude.

## ***OVERALL COMPETITIVE SCORING***

*0-5.0 = low*

*5.1-7.5 = moderate*

*7.6-10 = high*

**(4.99) Low Competition**

# **WARNING!!!!!!**

**Ownership needs to be aware that there is a limited amount of entertainment dollars allocated to the family household and the challenges set forth in capturing the revenues. Although many centers are not an immediate threat due to the uniqueness of the new or proposed facility, they WILL impact the dollars in some fashion. All critical points of the facility including aggressive marketing techniques, great guest service, and an incredible offering is needed to thrive in the market and offer long-term sustainability!**

- **Do not build a center on “guest service” alone!**
- **Do not open with an ego!**
- **Embrace competition!**
- **EVERYTHING MATTERS!**

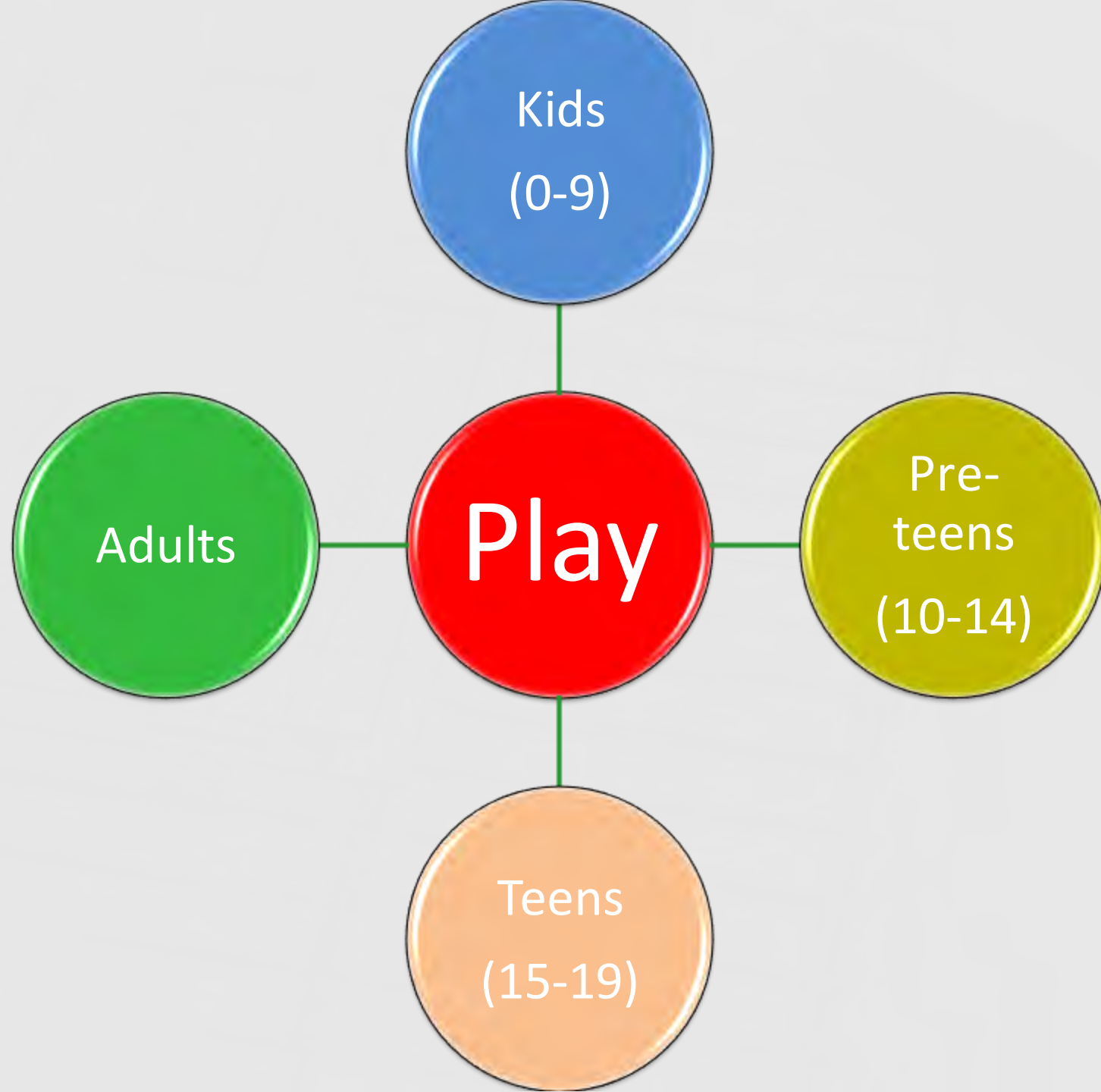
# Key Considerations

- 20-minute drive represents 70% of your repeat audience.
- Just because there is nothing there to do in your market does not mean a center will work.
- You can't be something for everyone.
- Trends, fads, and single-focused entertainment is one of the most challenging opportunities for long-term sustainability.
- Size matters!
- Food and beverage can be an important player in relevance and top-line revenues.
- Facebook polls  $\neq$  Feasibility



**Decisions + Outcomes = Profits**

# **3** Age Matters





## Executive Summary

1008 GA-53, Calhoun, Georgia, 30701  
Rings: 5, 10, 20 mile radii

Prepared by Esri  
Latitude: 34.47649  
Longitude: -84.96268

	5 miles	10 miles	20 miles
<b>Population</b>			
2010 Population	28,746	59,086	187,719
2020 Population	29,855	61,353	193,630
2023 Population	30,820	63,218	197,880
2028 Population	31,470	64,156	199,457
2010-2020 Annual Rate	0.38%	0.38%	0.31%
2020-2023 Annual Rate	0.98%	0.93%	0.67%
2023-2028 Annual Rate	0.42%	0.30%	0.16%
2023 Male Population	49.4%	49.7%	49.8%
2023 Female Population	50.6%	50.3%	50.2%
2023 Median Age	36.5	37.9	38.4

In the identified area, the current year population is 197,880. In 2020, the Census count in the area was 193,630. The rate of change since 2020 was 0.67% annually. The five-year projection for the population in the area is 199,457 representing a change of 0.16% annually from 2023 to 2028. Currently, the population is 49.8% male and 50.2% female.

### Median Age

The median age in this area is 38.4, compared to U.S. median age of 39.1.

2010 Population by Age	5 miles		10 miles		20 miles	
	Number	Percent	Number	Percent	Number	Percent
Age 0 - 4	2,315	8.1%	4,425	7.5%	13,412	7.1%
Age 5 - 9	2,186	7.6%	4,563	7.7%	13,941	7.4%
Age 10 - 14	2,075	7.2%	4,430	7.5%	13,860	7.4%
Age 15 - 19	2,161	7.5%	4,433	7.5%	14,237	7.6%
Age 20 - 24	1,931	6.7%	3,571	6.0%	11,815	6.3%
Age 25 - 34	3,960	13.8%	7,786	13.2%	23,816	12.7%
Age 35 - 44	3,967	13.8%	8,631	14.6%	26,891	14.3%
Age 45 - 54	3,793	13.2%	8,182	13.8%	26,558	14.1%
Age 55 - 64	2,936	10.2%	6,424	10.9%	21,127	11.3%
Age 65 - 74	1,954	6.8%	4,078	6.9%	13,335	7.1%
Age 75 - 84	1,088	3.8%	1,959	3.3%	6,551	3.5%
Age 85+	378	1.3%	602	1.0%	2,177	1.2%

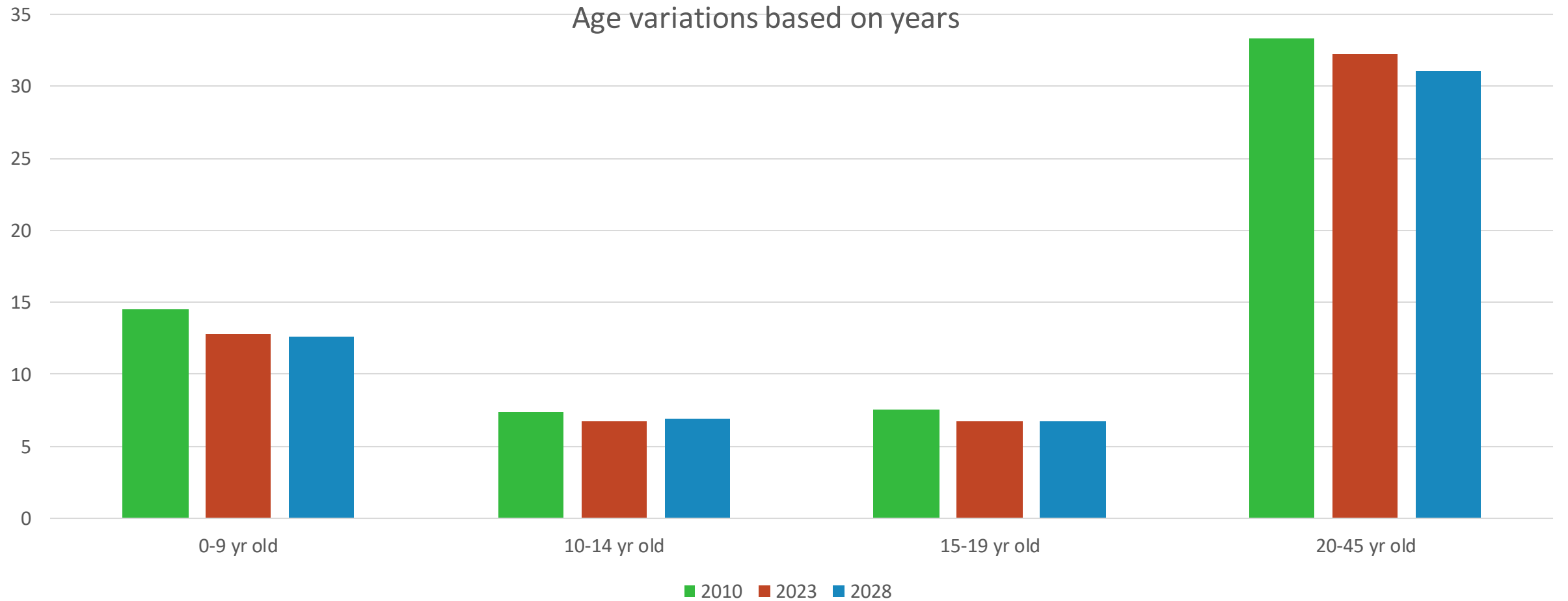
  

2023 Population by Age	Number	Percent	Number	Percent	Number	Percent
Age 0 - 4	2,161	7.0%	4,105	6.5%	12,224	6.2%
Age 5 - 9	2,289	7.4%	4,469	7.1%	13,141	6.6%
Age 10 - 14	2,251	7.3%	4,429	7.0%	13,278	6.7%
Age 15 - 19	1,944	6.3%	3,979	6.3%	13,231	6.7%
Age 20 - 24	1,739	5.6%	3,460	5.5%	11,786	6.0%
Age 25 - 34	4,364	14.2%	8,687	13.7%	26,395	13.3%
Age 35 - 44	4,179	13.6%	8,570	13.6%	25,753	13.0%
Age 45 - 54	3,590	11.6%	7,902	12.5%	24,884	12.6%
Age 55 - 64	3,545	11.5%	7,684	12.2%	24,627	12.4%
Age 65 - 74	2,846	9.2%	6,252	9.9%	20,213	10.2%
Age 75 - 84	1,460	4.7%	2,941	4.7%	9,673	4.9%
Age 85+	450	1.5%	740	1.2%	2,674	1.4%

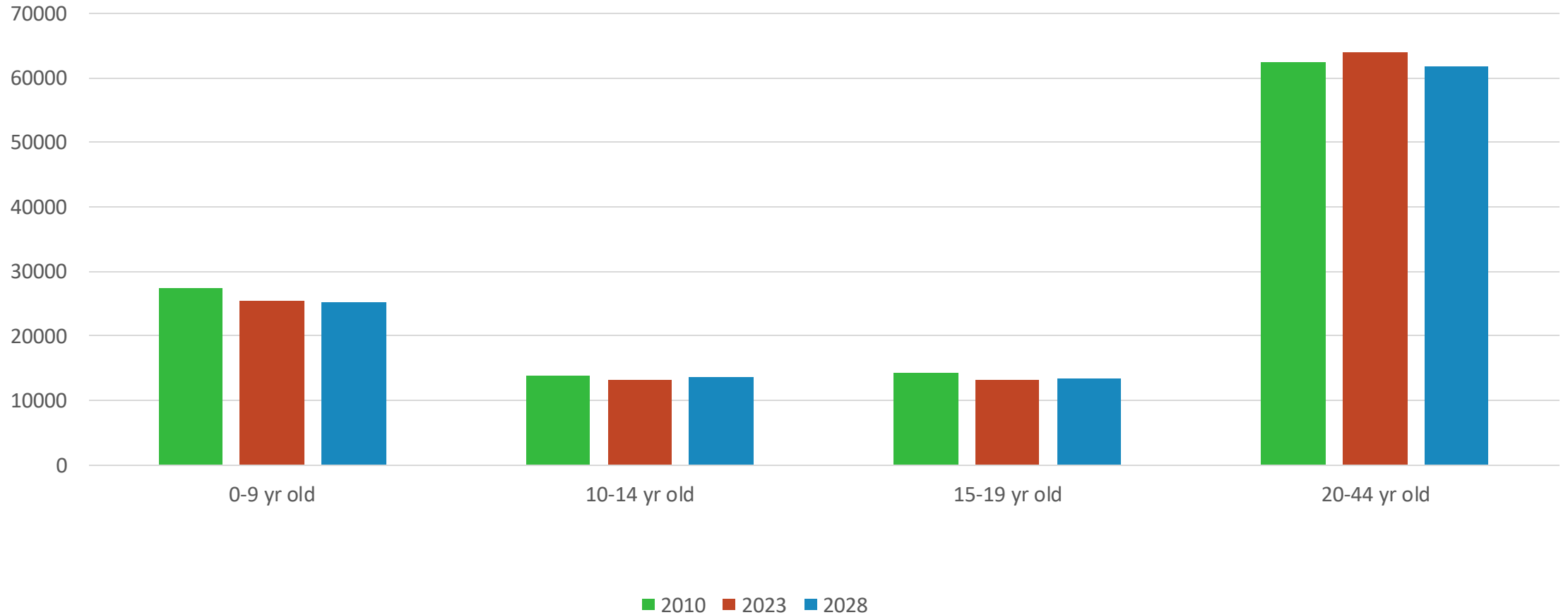
2028 Population by Age	Number	Percent	Number	Percent	Number	Percent
Age 0 - 4	2,239	7.1%	4,175	6.5%	12,263	6.1%
Age 5 - 9	2,305	7.3%	4,431	6.9%	12,868	6.5%
Age 10 - 14	2,387	7.6%	4,696	7.3%	13,730	6.9%
Age 15 - 19	2,126	6.8%	4,151	6.5%	13,387	6.7%
Age 20 - 24	1,741	5.5%	3,375	5.3%	11,470	5.8%
Age 25 - 34	3,901	12.4%	7,914	12.3%	23,667	11.9%
Age 35 - 44	4,496	14.3%	8,956	14.0%	26,765	13.4%
Age 45 - 54	3,677	11.7%	7,929	12.4%	24,752	12.4%
Age 55 - 64	3,429	10.9%	7,493	11.7%	23,964	12.0%
Age 65 - 74	2,890	9.2%	6,401	10.0%	20,990	10.5%
Age 75 - 84	1,742	5.5%	3,711	5.8%	12,279	6.2%
Age 85+	536	1.7%	926	1.4%	3,323	1.7%

# Ages of Play – Calhoun, GA



# The population of Ages – Calhoun, GA

Population based on years



# Key Differentiators of Calhoun Market for Consideration

Location off  
expressway

Outlet Mall in  
walking distance

8 national  
branded hotels

No competition

Ballpark overflow  
area for travel  
teams

Furthest outer  
ring of growth for  
Atlanta market



# 4 Attraction Mix

# Know Your Target Audience



**Define Target  
Age**



**Age Playability**



**Offering**



**Location**



**Demographic**



**Drive Time**

Bowling

Arcade

Laser Tag

VR

Escape  
Rooms

Mission  
Rooms

Axe  
Throwing

Mini Golf

Duckpin

Golf  
Simulators

Golf Bays

Ping Pong

Soft Play

Gem Mining

Trampolines

Immersive  
Dining

XD  
Theaters

Pool  
Tables

Sports Bar

Ninja  
Courses

Inflatables

Darts

Sports  
Bays

Selfie  
Rooms

Tiny Town

Go Karts

Mini Go  
karts

Beer Gardens

Food Halls

Laser Maze

Ropes  
course

Climbing  
Walls

Pickleball

Immersive  
Speakeasy

Skyriders

Virtual  
Baseball Bays

STRATOSPHERE

EPIC

DRONE TOUR





“Create relevance,  
not awareness.”

Steve Jobs

**WEEKLY SPECIALS**

- MONDAY FUNDAY**  
\$4 DRAFTS, \$4 WELL COCKTAILS
- TUESDAY BREWSDAY**  
\$3 DOMESTIC CANS/BOTTLES, \$4 CRAFT CANS/BOTTLES
- WINE-ME-UP WEDNESDAY**  
HALF PRICE BOTTLES OF WINE, HALF PRICE COCKTAILS
- TACOS & TEQUILA THURSDAY**  
\$3 TACOS, \$5 HOUSE MARGARITAS, \$7 PREM. MARGARITAS
- BUCKETFUL FRIDAY**  
\$20 BUCKETS OF DOMESTIC BOTTLES
- SIX-BUCK SATURDAY**  
\$6 JACK, JIM, JOSÉ, JAMESON'S
- SUNDAY, BLOODY SUNDAY**  
\$4 MIMOSAS, \$5 BLOODY MARYS

**BURGERS,  
BEER &  
BOWLING**

STRATOSPHERE SOCIAL

CELEBRATE  
**FATHER'S  
Day**  
ON THE LANES!





# Keys to Sustainability

- Be wary of like competition.
- Understand fads in entertainment.
- No “Mom and Pop”.
- Not enough revenue generating offerings.
- Location, Location, Location.



# Location

- 20-minute drive time
- Higher visibility = Less advertising
- Don't get an ego



# Population

- 200K within 20-minute drive time (additional 100K for each like competitor)
- **Segmented population for play**
- Get demo report to ensure your target isn't shrinking
- Kids parties represent 3-5% of segmented audience within 20 mins
- Avg market age of adults usually dictate opportunity





# Disposable Income

- Market Household income should be \$60,000 or higher with 15% or under mortgage/rental rates.
- Pricing of attractions should represent the market
- Time is a commodity
- Food offering offers great opportunity  
Consider comforts for adults – seating, alcohol, good food, TVs for sports



# Market Conditions

- Competition in the market can hurt you OR work in your favor!
- Understand pricing in the market
- Look for discounting in the market
- WAGES + SALARIES
- Individual market challenges

# Things Might Look Good at First Glance

	5 miles	10 miles	15 miles
<b>Population</b>			
2000 Population	38,669	190,948	570,569
2010 Population	42,350	221,755	631,442
2015 Population	43,017	227,437	645,993
2020 Population	43,747	234,730	666,567
2000-2010 Annual Rate	0.91%	1.51%	1.02%
2010-2015 Annual Rate	0.30%	0.48%	0.43%
2015-2020 Annual Rate	0.34%	0.63%	0.63%
2015 Male Population	50.4%	48.2%	47.8%
2015 Female Population	49.6%	51.8%	52.2%
2015 Median Age	42.4	40.8	40.8

In the identified area, the current year population is 645,993. In 2010, the Census count in the area was 631,442. The rate of change since 2010 was 0.43% annually. The five-year projection for the population in the area is 666,567 representing a change of 0.63% annually from 2015 to 2020. Currently, the population is 47.8% male and 52.2% female.

## Median Age

The median age in this area is 42.4, compared to U.S. median age of 37.9.



# Things Might Look Good at First Glance

Average Household Income			
2015 Average Household Income	\$122,363	\$115,675	\$108,868
2020 Average Household Income	\$140,486	\$132,157	\$124,322
2015-2020 Annual Rate	2.80%	2.70%	2.69%



Median Age			
2010	41.0	39.7	39.7
2015	42.4	40.8	40.8
2020	43.3	41.3	41.3





**But the devil is in the details...**

	5 miles	10 miles	15 miles
<b>2010 Population by Age</b>			
Total	42,347	221,755	631,443
0 - 4	5.1%	5.6%	5.9%
5 - 9	7.4%	6.8%	6.6%
10 - 14	8.2%	7.6%	7.2%
15 - 24	13.0%	13.3%	13.1%
25 - 34	8.4%	10.7%	11.4%
35 - 44	14.8%	14.3%	13.6%
45 - 54	19.0%	17.4%	16.4%
55 - 64	12.2%	12.9%	12.9%
65 - 74	6.6%	6.7%	7.1%
75 - 84	3.7%	3.4%	4.1%
85 +	1.6%	1.3%	1.8%
18 +	74.0%	75.2%	75.7%

**7.6%**

**16,853**

<b>2015 Population by Age</b>			
Total	43,017	227,438	645,995
0 - 4	4.6%	5.2%	5.5%
5 - 9	5.9%	6.1%	6.2%
10 - 14	7.9%	7.3%	6.9%
15 - 24	13.2%	13.3%	12.7%
25 - 34	10.3%	11.5%	12.0%
35 - 44	11.6%	12.3%	12.1%
45 - 54	18.1%	16.3%	15.2%
55 - 64	14.3%	14.1%	13.9%
65 - 74	8.4%	8.7%	9.0%
75 - 84	3.8%	3.7%	4.3%
85 +	1.9%	1.5%	2.0%
18 +	76.9%	77.1%	77.3%

**7.3%**

**16,602**



**Total 8.1% Decrease!**

<b>2020 Population by Age</b>			
Total	43,745	234,728	666,565
0 - 4	4.5%	5.1%	5.4%
5 - 9	5.3%	5.6%	5.7%
10 - 14	6.5%	6.6%	6.6%
15 - 24	12.2%	12.2%	11.7%
25 - 34	11.5%	12.4%	12.6%
35 - 44	11.8%	12.6%	12.5%
45 - 54	15.1%	14.3%	13.5%
55 - 64	16.2%	14.7%	14.3%
65 - 74	10.0%	10.3%	10.4%
75 - 84	4.7%	4.6%	5.1%

**6.6%**

**15,492**

# Attention to Details Matter

2015 Population by Age				
Total		43,017	227,438	645,995
0 - 4		4.6%	5.2%	5.5%
5 - 9		5.9%	6.1%	6.2%
10 - 14		7.9%	7.3%	6.9%
15 - 24		13.2%	13.3%	12.7%
25 - 34		10.3%	11.5%	12.0%
35 - 44		11.6%	12.3%	12.1%
45 - 54		18.1%	16.3%	15.2%
55 - 64		14.3%	14.1%	13.9%
65 - 74		8.4%	8.7%	9.0%
75 - 84		3.8%	3.7%	4.3%
85 +		1.9%	1.5%	2.0%
18 +		76.9%	77.1%	77.3%

15 – 45 years old = 37.1% or 84,379 possible guests



# True Story

## Opportunities

- ✓ Business for 5 years
- ✓ High household income
- ✓ No local market challenges
- ✓ Great staff
- ✓ Target ages 10-14

## Challenges

- ✓ Sales stagnant
- ✓ Tired business with low appeal
- ✓ Building run down
- ✓ Competition within 20 miles
- ✓ Single focus with add-ons

# Our Recommendations



**Modernize to stay relevant**



**Add attractions/food sustainably**



**Add packages to increase revenue**



**Negotiate to increase profits**



**Change age appeal**



**Q&A**

# Understanding Needs. Delivering Results.





# Thank you

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Schedule a Free Consultation  
[Turfwayentertainment.com](http://Turfwayentertainment.com)

Text me: 859-285-7111