

G I S S I T E S E L E C T I O N • S A N D I E G O C O U N T Y

Planet Fitness

Site Suitability Analysis

797

Candidate parcels evaluated

A demographic and competitive overlay analysis identifying the three most viable jurisdictions for a new franchise location

PREPARED BY

Mario Nonog

PROJECT DATE

May 2026

The Question

Where is the best place in San Diego County to open a new Planet Fitness franchise?

THE BUSINESS PROBLEM

Planet Fitness's franchise model depends on a precise customer fit:

- Value-conscious customers with household incomes between \$50K and \$75K
- A working-age population (18–44) dense enough to fill memberships
- Sufficient distance from existing gyms to avoid cannibalization

THE GIS APPROACH

Layer every relevant variable, score every parcel, then rank.

This analysis converts an open-ended business question into a measurable, defensible GIS workflow built on three pillars:

**INCOME FIT • DEMOGRAPHIC FIT •
COMPETITIVE DISTANCE**

The output is a tiered jurisdiction ranking backed by parcel-level evidence — usable directly by a franchise selection team.

The Data

Three authoritative datasets, integrated by geographic location

SOURCE 01

SanGIS Parcels

2024

Every taxable parcel in San Diego County, with assessor-coded land use, zoning, acreage, and address. Updated weekly.

1.05 M

Total parcels countywide

SOURCE 02

ACS Demographics

2018–2022

U.S. Census Bureau American Community Survey 5-Year Estimates at the Census tract level: median household income and population by age.

736

Census tracts in San Diego County

SOURCE 03

Competitor Locations

2026

Existing Planet Fitness and 24 Hour Fitness storefronts, manually compiled from corporate websites and geocoded.

30+

Competitor sites mapped

The Process

Five sequential filters reduce 1 million parcels to a defensible shortlist



GATHER

Load parcels,
demographics,
competitor sites



EXCLUDE

2-mile buffer
around existing
gyms removed



FILTER

Keep commercial
zoning + acreage
≥ 1.5 acres



ENRICH

Spatial join with
income + age
tract data



SCORE

Weighted index:
income 55%,
demographics 45%

OUTCOME

From a million parcels to a shortlist of just 28

1,054,840 → 797 → 28 top recommended sites

Filtering the Universe

Two spatial filters eliminated saturated zones and non-buildable land

FILTER 01 • COMPETITOR BUFFER

Exclude parcels within 2 miles of any existing Planet Fitness or 24 Hour Fitness location

ArcGIS Buffer tool created 2-mile rings around each competitor. Erase tool removed any parcel intersecting these rings — eliminating already-saturated trade areas.

FILTER 02 • LAND USE + SIZE

Keep only buildable commercial parcels of adequate size

SQL filter on SanGIS attributes:

`NUCLEUS_US IN (200, 213, 215, 216, 230, 240, 250, 251, 252, 340)
AND ACREAGE >= 1.5 AND NUCLEUS_ZO IN (50, 60)`

= vacant commercial, strip retail, shopping centers, standalone retail

THE FUNNEL

Starting universe **1,054,840**

After 2-mile buffer **778,615**

After commercial filter **797**

Each step is defensible: the buffer reflects franchise trade-area conventions; the land-use filter mirrors actual Planet Fitness real estate criteria.

Scoring Each Parcel

Two demographic dimensions converted from raw data to comparable 1–10 scores

INCOME SCORE · WEIGHT 55 %

Median household income fit

Planet Fitness targets value-conscious customers, not luxury gym-goers. The scoring bracket peaks at \$50K–\$75K — the brand's documented core demographic.

INCOME RANGE	SCORE	FIT
\$50K – \$75K	10	Bullseye
\$40–50K or \$75–85K	8	Strong fit
\$30–40K or \$85–100K	5	Marginal
< \$30K or > \$100K	2	Poor fit

POPULATION SCORE · WEIGHT 45 %

Working-age population concentration

Calculated for each tract: percentage of population aged 18–44, summed from 16 ACS sex-and-age fields using a custom Arcade expression.

% AGED 18–44	SCORE	FIT
> 50%	10	Densely young
40 – 50%	8	Strong
30 – 40%	5	Average
< 30%	1–3	Weak / older skew

The Final Score

Income and demographic scores combined into a single weighted index

THE FORMULA

$$\text{Final Score} = (\text{Income Score} \times 0.55) + (\text{Population Score} \times 0.45)$$

WHY 55 / 45?

Income is the slightly stronger predictor of Planet Fitness performance — the brand's pricing model depends on a specific household-income band. Population density of the 18–44 demographic is a close second: without enough target-age residents in walking or short-driving distance, even a perfect income match will struggle to fill memberships.

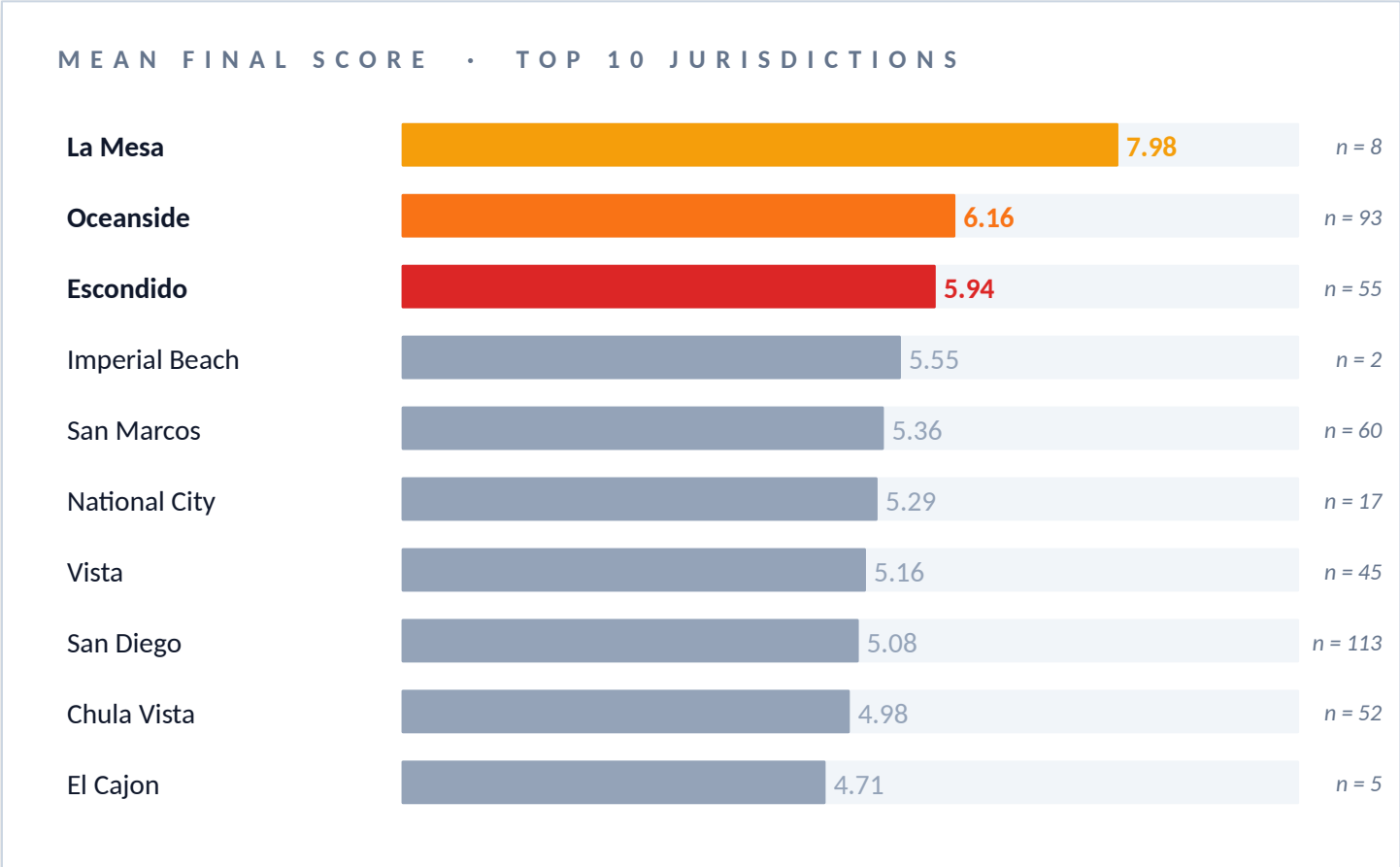
$(10 \times 0.55) + (10 \times 0.45) = \mathbf{10.0}$ Bullseye site

$(10 \times 0.55) + (8 \times 0.45) = \mathbf{9.1}$ Strong fit

$(5 \times 0.55) + (8 \times 0.45) = \mathbf{5.6}$ Marginal

The Rankings

Mean Final Score across all candidate parcels, by jurisdiction



01 **La Mesa**

Mean **7.98** • 8 parcels

Highest demographic match, limited inventory

02 **Oceanside**

Mean **6.16** • 93 parcels

Best balance of fit and site availability

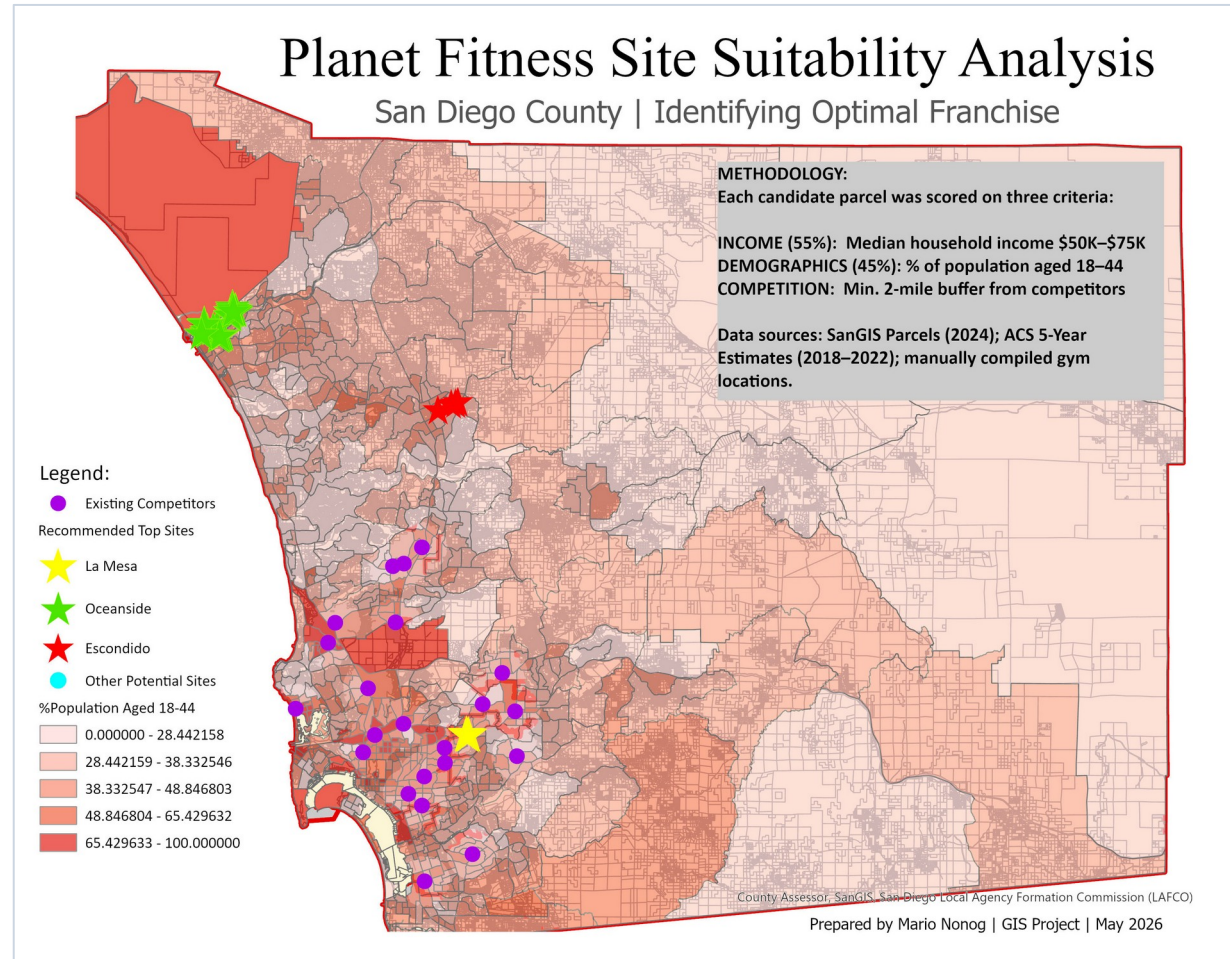
03 **Escondido**

Mean **5.94** • 55 parcels

Strong North County inland opportunity

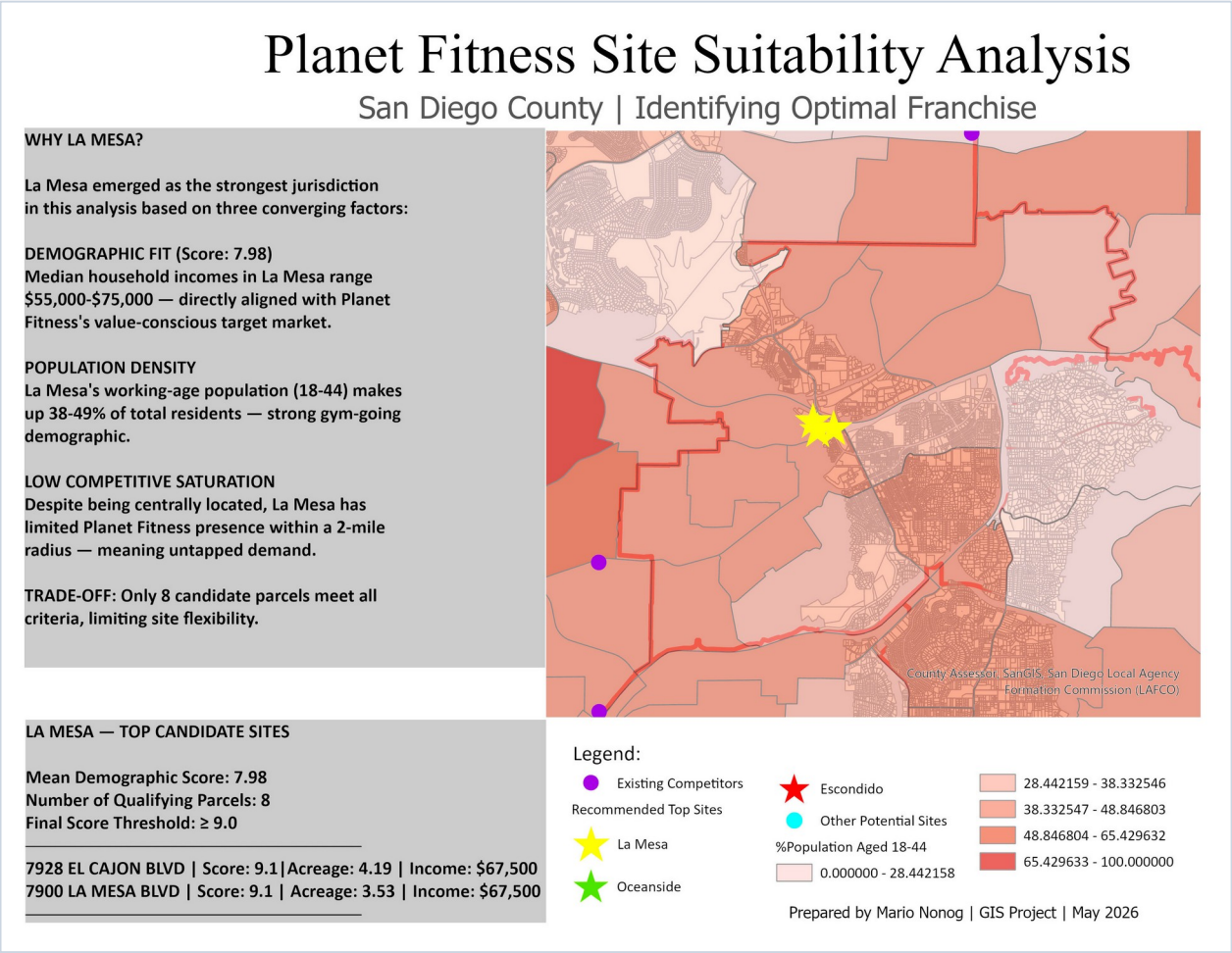
The Map — Countywide View

All 28 top-scoring parcels (stars) plotted across San Diego County with demographic background



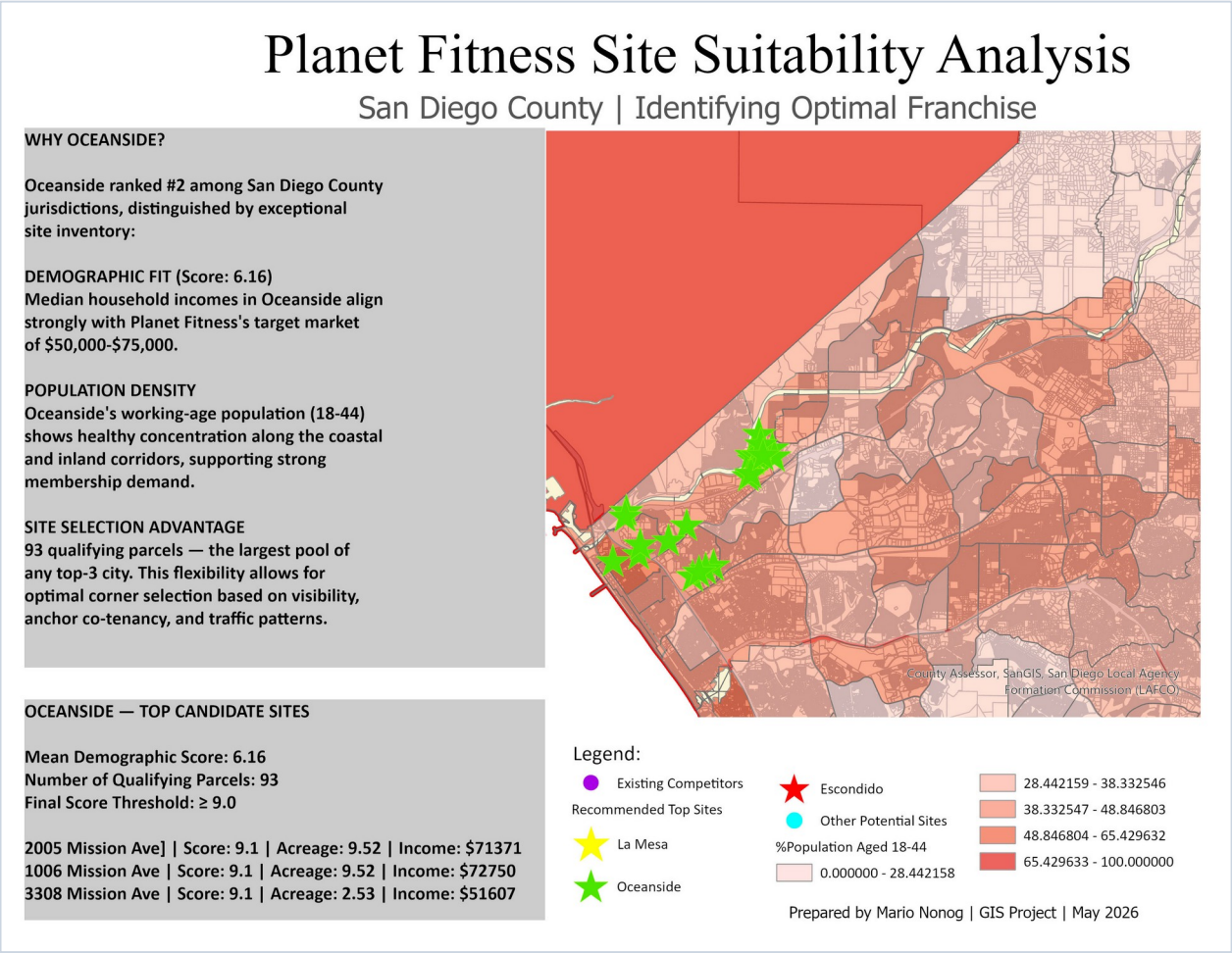
01 La Mesa

Mean Score 7.98 · 8 parcels · Highest demographic match



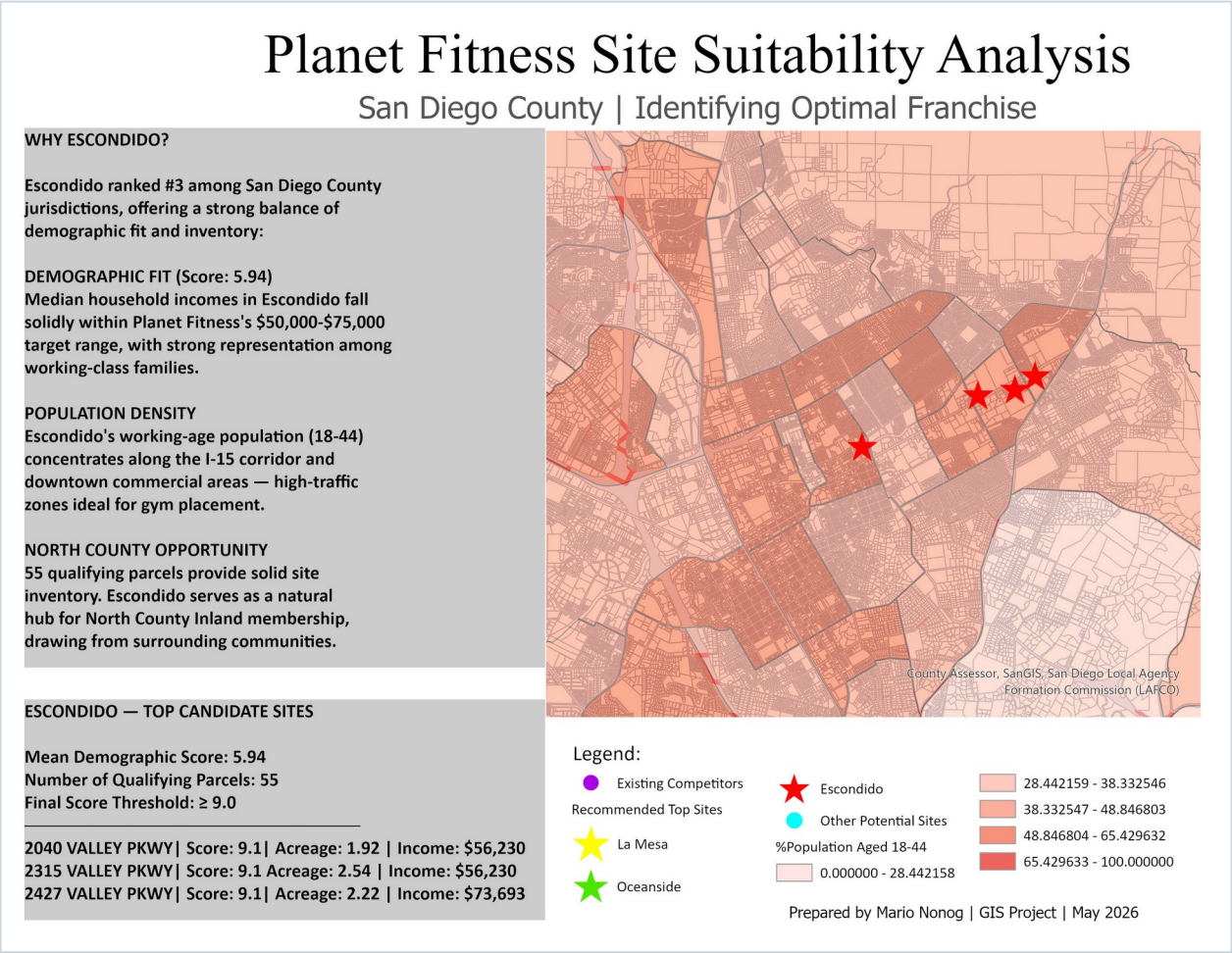
02 Oceanside

Mean Score 6.16 · 93 parcels · Best balance of fit & inventory



03 Escondido

Mean Score 5.94 • 55 parcels • Strong North County opportunity



Key Insights & Limitations

What this analysis reveals — and what it cannot say

KEY INSIGHTS

Demographics matter more than density

Coastal areas (Del Mar, Solana Beach, Encinitas) ranked lowest despite high population — incomes far above PF's target band.

The single best site is in National City

0 Bay Marina Dr scored a perfect 10.0 — but with only 17 candidate parcels citywide, National City didn't crack the top 3 by mean score.

Valley Parkway is a hot corridor

Four of the top 28 sites cluster along Valley Pkwy in Escondido — suggesting strong demographic alignment in that commercial strip.

Inventory matters as much as mean score

La Mesa scored highest but offers only 8 sites. Oceanside's 93 sites give a franchise team room to negotiate.

LIMITATIONS

Two dimensions, not all dimensions

Foot traffic, parking, visibility from major roads, anchor co-tenancy, and lease availability are not captured — all matter to real franchise decisions.

Tract-level demographics smooth out neighborhoods

A single Census tract may contain very different micro-neighborhoods. Block-group data would be sharper for site-level decisions.

Land-use codes lag reality

SanGIS warns its land-use field is updated irregularly. A parcel listed as "vacant commercial" may have a new tenant; ground-truthing is essential.

Buffer assumption

The 2-mile competitor radius is appropriate for urban San Diego but conservative for North County. A variable buffer would refine results.

Recommendations

Where this analysis points next

01

Ground-truth the top 10

Visit highest-scoring parcels in person. Check visibility, parking, anchor co-tenancy, and adjacent retail mix that GIS can't capture.

02

Add a third scoring dimension

Drive-time analysis using ArcGIS Network Analyst. A site with strong demographics but poor accessibility won't perform.

03

Refine with block-group data

Re-run the demographic overlay at the Census block-group level for sharper neighborhood-scale precision in dense areas.

04

Variable competitor buffers

Apply tighter buffers (1.5 mi) in dense urban zones and wider buffers (4–5 mi) in North County to reflect real trade-area geometry.

Thank you