



A FourSquare Market Study
**Opportunities for a
Canal Fulton Family YMCA**

Presented to the
YMCA of Central Stark County

January 23, 2014

Submitted by



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Market Research and Strategic Planning for Non-profits Nationwide

January 23, 2014

Timothy Shetzer
Chief Executive Officer
YMCA of Central Stark County
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Canton, OH 44702-1705

Dear Tim:

I am pleased to submit the results of our market research study on the opportunities for a new Canal Fulton Family YMCA.

This report provides forecasts for new, annual membership units for a new Canal Fulton Family YMCA at three proposed locations. It also contains detailed information on the demographics, psychographics, and program interest of prospective members of the new YMCA.

We have enjoyed working with you, other members of the YMCA, and representatives from potential partners, including the City of Canal Fulton, Lawrence Township, Northwest School District, and Mercy Medical. We pride ourselves on the level of service that we extend to our clients, and with that in mind, we hope that you will call on us if we can offer any guidance on implementing the report's plan.

Please do not hesitate to contact us if you have any questions.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Li Li", with a stylized flourish at the end.

Li Li
Managing Partner

Attachment

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Chapter One
Executive Summary

Executive Summary

In order to assess the opportunities for a new Canal Fulton Family YMCA branch of the YMCA of Central Stark County, FourSquare Research conducted both qualitative and quantitative research. This included in-depth telephone interviews with over 600 randomly selected households in the targeted survey area but do not belong to any YMCA. Based on the findings of the study, the Consultant offers the following key conclusions and recommendations:

1. The study revealed that significant interest exists for a new Canal Fulton Family YMCA. A total of 6.8% of all households expressed *a great deal of interest* with all location, pricing and facility options. That is much higher than the national average of 4.5% for a full-facility YMCA. This is also above and beyond the 9.8% of all area households that already belong to the David YMCA in Jackson Township.
2. Of the three sites explored, the Canal Fulton location won the vast majority of prospective member votes.
3. The findings revealed that the community characteristics include a very inactive population, a marketplace with a good number of existing for-profit providers but in need of providers from the public/non-profit section, a small and stagnant population, and a high awareness of the YMCA name. These characteristics would create opportunities and challenges for the new YMCA.
4. The findings revealed price-sensitivity among prospective members. As such, both the current YMCA membership rates and the new, lower/branch-only rates are recommended for the new YMCA.
5. The study revealed that the primary prospective member groups of a new YMCA include families with children, aging baby-boomers, empty-nesters, and Health-seekers, many of whom require a hand-holding approach and desire a “Third Place” at the YMCA.
6. If the decision is made to proceed with the building of a new Canal Fulton Family YMCA at the Canal Fulton location, the Consultant recommends an indoor Phase I facility with approximately 19,500 square feet.

The tables on the following pages illustrate the summary of forecasts for the membership projections logic model, a summary of program usage, and the space allocation recommended for a new Canal Fulton Family YMCA at the Canal Fulton location.

Summary of Forecasts

The chart below summarizes the findings of the market research study that forecasts the opportunities for a Canal Fulton Family YMCA.

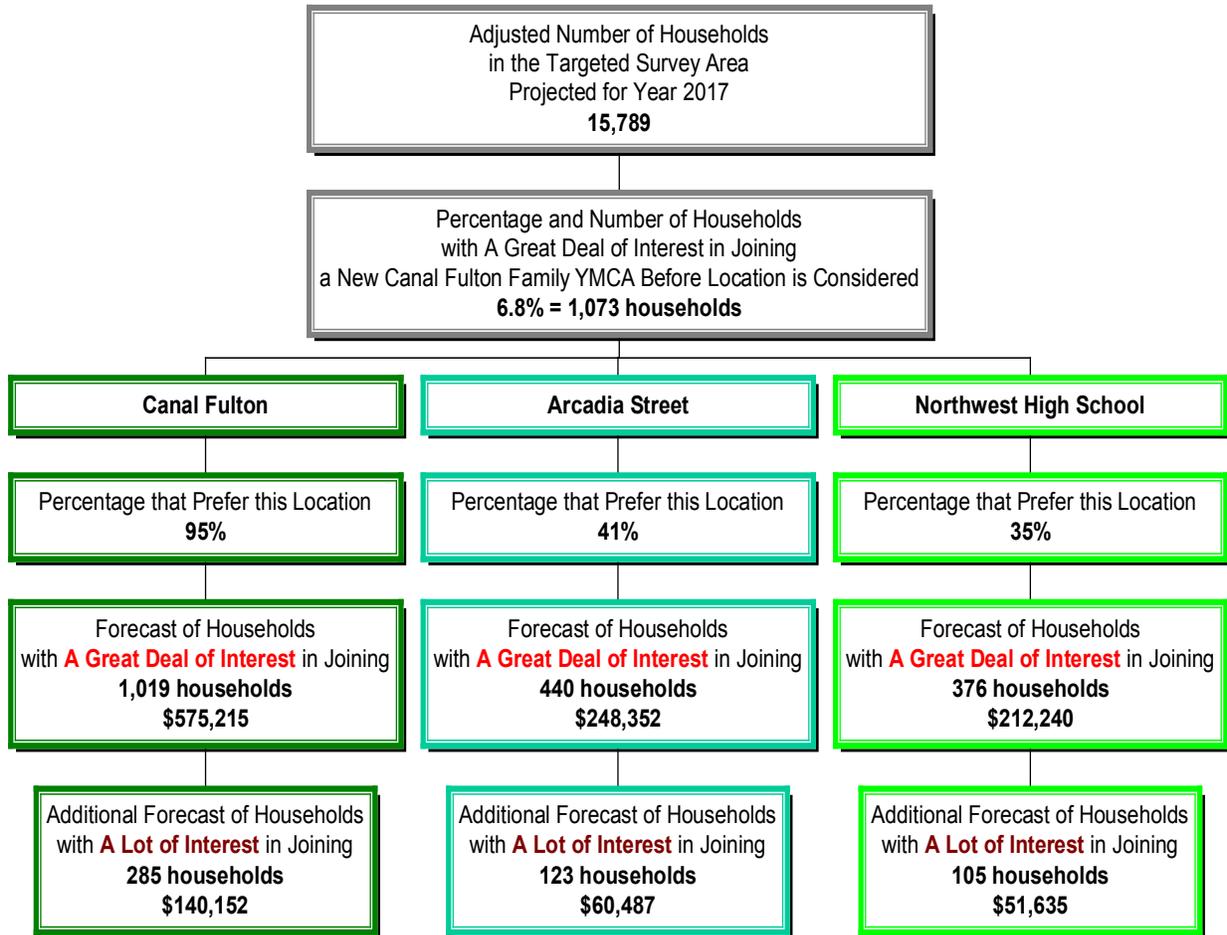


Figure 1.01 Summary of Forecasts

Program Usage of Major Features

The following table shows the level of usage of facility features by programs among prospective members.

Features of a New Canal Fulton Family YMCA								
Programs	Wellness/ Fitness Center	Group Exercise Studios	Multipurpose Classrooms	Indoor Multipurpose Gymnasium	Indoor Warm Water Family Pool	Indoor Walking and Running Track	Child Watch Babysitting	Youth/ Teen Center
Adult Fitness	Very High	Very High			High	Very High		
Adult Aquatics					Very High			
Adult Adventure								
Adult Sports				Low				
Adult Recreation			Moderate					
Nutrition and Weight Management			Moderate					
Stress and Relaxation		Very High						
Rehab/Health Programs			Moderate					
Women's Programs	Moderate							
Family Activities		Moderate			High			
Programs for Children Ages 0-2			Very Low		Low		Low	
Programs for Children Ages 3-5		Low	Moderate	Low	High		Moderate	
Programs for Children Ages 6-9		Low	Low	Moderate	Very High		Moderate	
Programs for Children Ages 10-13	Very High	Low	Low	High	Very High			Very High
Programs for Children Ages 14-17	Moderate	Low	Low	Low	Low			Moderate
Adult Rating Scale	Low	<15%		Children's Rating Scale		Low	<5%	
	Moderate	15%–29%				Moderate	5%–9%	
	High	30%–44%				High	10%–14%	
	Very High	≥45%				Very High	≥15%	

Figure 1.02 Summary of Usage among Prospective Members of a Canal Fulton Family YMCA

Recommended Space Allocation for a New Canal Fulton Family YMCA

Phase I Indoor Features Critical in Attracting New Membership Units for a New Canal Fulton Family YMCA	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes: <ul style="list-style-type: none"> • a cardiovascular area of 1,500 sq. ft. • a free-weights and strength-training equipment area of 1,000 sq. ft., including a 30-minute circuit-training area • a designated workout area of 500 sq. ft. with more staff supervision for teens, beginners, and women • consulting areas/rooms of 500 sq. ft 	3,500	Figure 8.01, Figure 10.01, & Figure 10.02
Two group exercise studios, one of 1,500 square feet for aerobics and group fitness classes, the other of 800 square feet for relaxation, dance, yoga, and tai chi, and specialty classes such as cycling and pilates	2,300	Figure 8.01, Figure 9.01 Figure 10.01, & Figure 10.02
Multipurpose class rooms for arts and craft programs, health education, and senior social programs	500	Figure 10.05, & Figure 11.03
An indoor multipurpose activity center with half courts, dividers, retractable hoops, versatile flooring, and ample storage space for a variety of activities such as basketball, volleyball, gymnastics, summer day camps, and family nights	5,000	Figure 7.02, Figure 7.03, Figure 8.01, & Figure 11.01
Child watch/babysitting area for infants and toddlers ages 0-5	800	Figure 7.01
Youth and teen center with TV, pool tables, Exergame, and seating for social activities (which can also be used for other programs when needed)	1,000	Figure 9.01
Members' lounge/snack bar/social area/community program area	1,000	Figure 10.03
Showers, lockers, and changing areas for men, women, and families	1,500	Figure 10.04
Subtotal	15,600	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	3,900	
Phase I Total Indoor	19,500	
Phase I Outdoor Features		
Outdoor trail for walking and running with fitness stations	N/A	Figure 10.01
Phase II Features		
An indoor warm-water family pool with zero degree/beach entry for recreational swimming, lessons, and water aerobics, as well as two lanes for lap swimming and aqua walking/running	7,000	Figure 12.01, & Figure 12.02
An indoor multipurpose gymnasium with a full court by adding to the Phase I activity center	5,000	Figure 7.02, Figure 7.03, Figure 8.01, & Figure 11.01
Subtotal	12,000	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	3,000	
Phase II Total Indoor	15,000	

Figure 1.03 Features Critical to the Success of a New Canal Fulton Family YMCA

Chapter Two

Methodology and Scope

Methodology

This study used the following methodology:

- The qualitative research was conducted through focus group discussions with representatives of the YMCA of Central Stark County, City of Canal Fulton, Lawrence Township, Mercy Hospital, and community leaders who are interested in a new YMCA serving Canal Fulton and the surrounding communities. A market audit of similar service providers was also conducted at this time. The responses and concerns in the qualitative phase were used toward the development of the survey instrument used in the quantitative phase.
- The quantitative research in this study involved in-depth telephone interviews with over 600 randomly selected households in the targeted survey area that do not currently belong to a YMCA. Interviews were conducted in Spanish as needed. The boundaries of the targeted survey area are defined in the map on page 17.

In addition to random sampling, a quota system was developed to ensure that the number of interviews completed in each census tract was proportionate to the number of households in each census tract. Also, the percentage of interviews with respondents age 65 and older was controlled to be consistent with the percentage of seniors age 65 and older in the general population.

All respondents were asked to answer questions for themselves and on behalf of the household when applicable. All interviews were conducted November 03–16, 2013. The methodology used resulted in findings with a 95% confidence level and a statistical error of plus or minus 4.0%.

The recommendations provided in this report are based on this methodology and on the experience of FourSquare Research, Inc., with over 700 similar market research studies with YMCAs nationwide.

Scope

The specific questions addressed included, but were not limited to, the following:

- How can a new YMCA best serve the residents of Canal Fulton, the Northwest Local School District, and their surrounding communities?
- What is the demand for a new YMCA in Canal Fulton? How many member households will join the new YMCA during the first 12-18 months after it is built?
- What is the potential in revenue generated from new membership units within the first 12-18 months of operation of a new YMCA in Canal Fulton? Would it be enough to support the operation?
- How many households will use an interim facility at the local high school while the new facility is being developed?
- How would prospective members perceive the proposed sites for a new YMCA? Which of the proposed locations would attract the highest number of member households for a new YMCA?
- Will there be any differences in the profiles of prospective members between the proposed sites?
- Which configuration of facility features for a new YMCA in Canal Fulton will attract the highest number of membership units? If the new YMCA is to be built in phases, which configuration of major features needs to be included in Phase I to ensure a sufficient membership base for further growth?
- What types of new and traditional YMCA programs and services should be offered for people of all ages, including youths, adults, families, and seniors?
- Are area residents aware of the YMCA of Central Stark County in their community? What is their perception of the YMCA? Have they ever participated in any YMCA programs?
- What are the demographic and psychographic profiles of prospective members?
- What is the new YMCA's niche in the community? Can the new YMCA complement the existing YMCAs in the area and increase the total value of the YMCA membership?
- What pricing strategies would attract the highest number of member households? Would the current rate structure of the YMCA of Central Stark County work? Should the YMCA consider new rates such as branch-only rates for the new YMCA, or income-based rates?
- How can a new YMCA make the community better and improve the quality of life of the people living in it by identifying, targeting, and supporting Health-seekers? Health-seekers include youths, adults, seniors, and families of all ages who are struggling to achieve and maintain a healthy lifestyle.

Chapter Three

Defining the Survey Area

Census Tract Map of the Area Targeted for the Survey

The following map shows the census tracts in the targeted survey area.

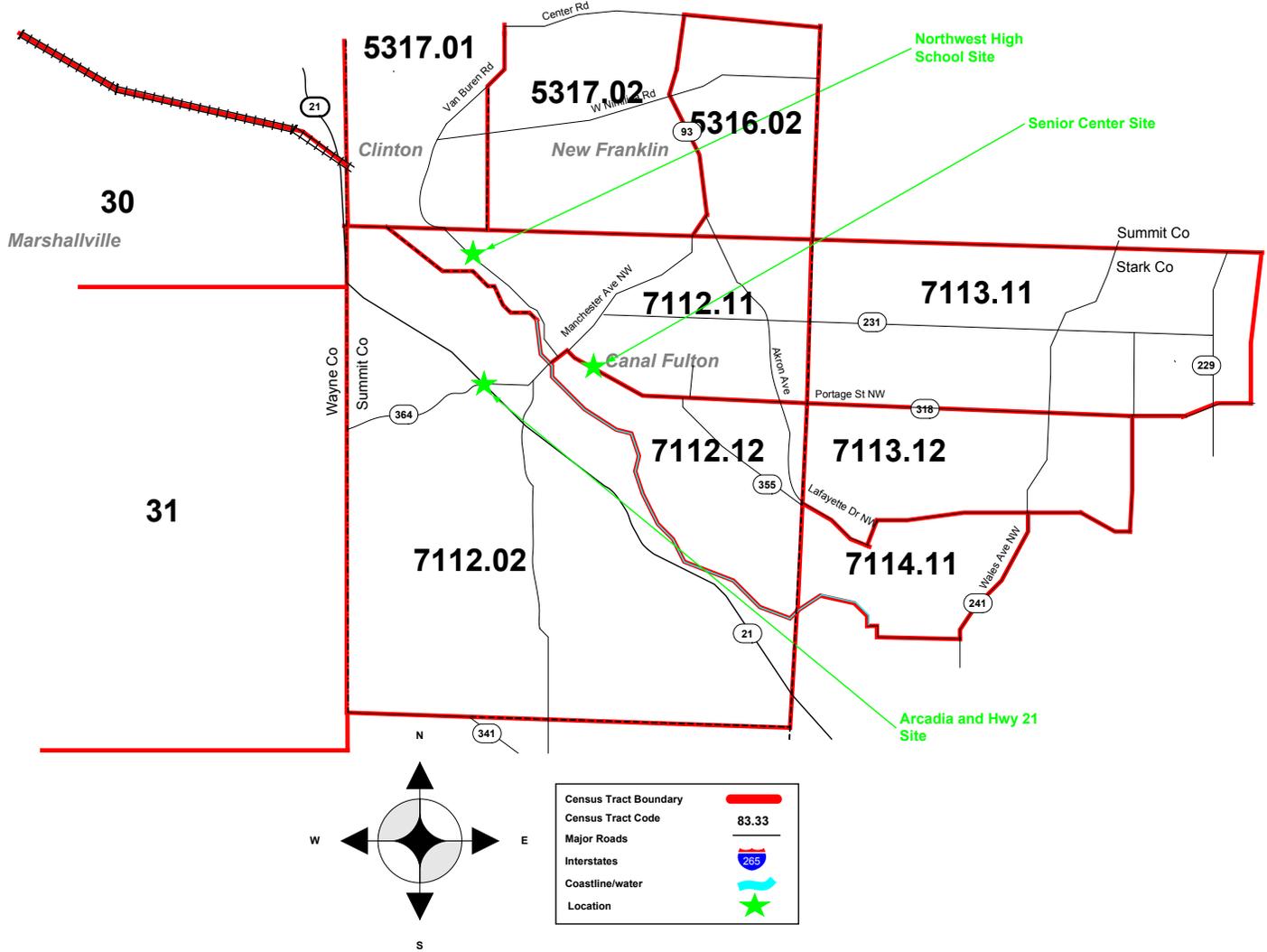


Figure 3.01 Census Tract Map of the Targeted Survey Area

Demographic and Population Trends Analysis of the Area Targeted for the Survey, 2012–2017

The tables on this and the following page detail the population trends in the targeted survey area for the years 2012–2017. This information is provided by the United States Census Bureau.

Summary of Demographics

1. Residential growth below the national average
2. Percentage of households with children slightly below the national average
3. Percentage of adults 65 or older slightly above the national average
4. Median household income above the national average
5. Percentage of households with total annual household income less than \$35,000 and less than \$50,000 well below the national average
6. Percentage of households owned by occupants well above the national average and rentals are below the national average, pointing to a stable community

	2010 Census	2012 Estimates	2017 Projections	2012 Nat'l. Average
Total Population	48,266	48,102	47,683	4%
Total Households	18,091	18,035	17,925	5%
		-1% growth from 2012-2017		
Total Population By Race				
White	96%	96%	96%	72%
African American	1%	1%	1%	13%
American Indian	0%	0%	0%	1%
Asian	1%	1%	1%	5%
Other/Multi-Races	1%	1%	1%	9%
Hispanic Origin*	1%	1%	2%	19%
Total Population By Gender				
Male	50%	50%	50%	49%
Female	50%	50%	50%	51%
Household				
Average Household Size	2.66	2.66	2.66	2.64
Percentage of Family Household	77%	77%	77%	67%

*Hispanic origin can be any race.

Note: These figures are double-checked using Survey Sampling Inc.

Demographic and Population Trends Analysis (continued)

	2010 Census	2012 Estimates	2017 Projections	2012 Nat'l. Average
Total Population by Age				
0–5 years	5%	5%	5%	
5–9 years	7%	6%	6%	
10–14 years	8%	7%	7%	
15–19 years	7%	7%	7%	
20–24 years	5%	5%	5%	
25–34 years	9%	9%	9%	
35–44 years	13%	13%	12%	
45–54 years	17%	17%	15%	
55–64 years	15%	16%	16%	
65–74 years	8%	9%	11%	
75–84 years	4%	4%	4%	
85 + years	2%	2%	2%	
			25%	27%
			15%	13%
General Income Data				
Median Household Income	\$58,052	\$60,679	\$62,925	\$53,616
Average Household Income	\$83,557	\$78,194	\$80,642	\$73,444
Household Income Distribution				
\$0 – \$14,999	7%	6%	5%	
\$15,000 – \$24,999	7%	6%	6%	
\$25,000 – \$34,999	10%	9%	8%	
\$35,000 – \$49,999	16%	17%	17%	
\$50,000 – \$74,999	22%	22%	20%	
\$75,000 – \$99,999	15%	16%	15%	
\$100,000 – \$149,999	14%	14%	16%	
\$150,000 and over	10%	12%	14%	
			21%	32%
			19%	14%
Household Ownership				
Owned	81%	81%	80%	58%
Rented	14%	14%	14%	29%
Vacant	5%	6%	6%	13%
Employment (Pop 16+)				
Civilian, Employed	68%	65%	65%	58%
Civilian, Unemployed		3%	3%	5%
In Armed Forces	0.2%	0.2%	0.2%	0%
Not in Labor Force	32%	31%	31%	37%

Copyright Market Statistics, Inc. 2013

Figure 3.02 Population Trends Analysis of the Targeted Survey Area

Household Growth Trends by Census Tract, 2012–2017

The following table gives the household growth trends by census tract in the area targeted for the survey for the years 2012–2017. This is from Survey Sampling Inc., a national data provider.

Census Tract	2012 Estimate	2017 Projection	% of Change '12-'17	2012 Median Income	Current Membership Units (David YMCA)	% Penetration
51711202	1,584	1,578	0%	\$60,679	39	2.5%
51711211	2,696	2,684	0%	\$53,460	147	5.5%
51711212	964	960	0%	\$54,117	49	5.1%
51711311	2,987	2,974	0%	\$72,224	545	18.2%
51711312	2,533	2,521	0%	\$84,055	635	25.1%
51711411	1,432	1,427	0%	\$90,243	337	23.5%
53531602	1,211	1,192	-2%	\$52,337	10	0.8%
53531701	1,465	1,441	-2%	\$58,678	5	0.3%
53531702	1,602	1,577	-2%	\$61,951	7	0.4%
69003000	797	802	1%	\$52,999	1	0.1%
69003100	764	769	1%	\$68,723	0	0.0%
Total/average	18,035	17,925	-1%	\$60,679	1,775	9.8%

Figure 3.03 Household Growth Trends by Census Tract

Chapter Four

Findings among Area Residents

Awareness of the YMCA among Area Residents

The following chart shows the level of awareness of the YMCA among area residents.

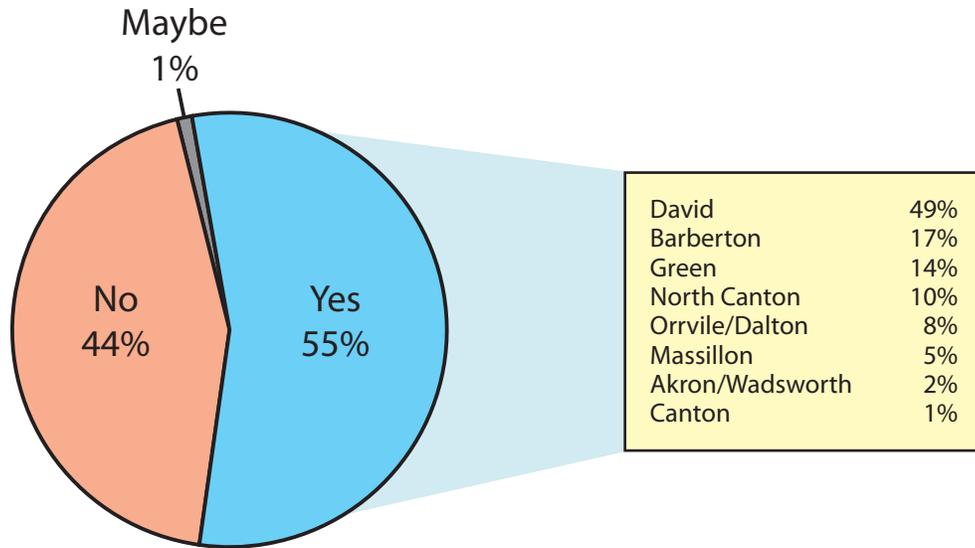
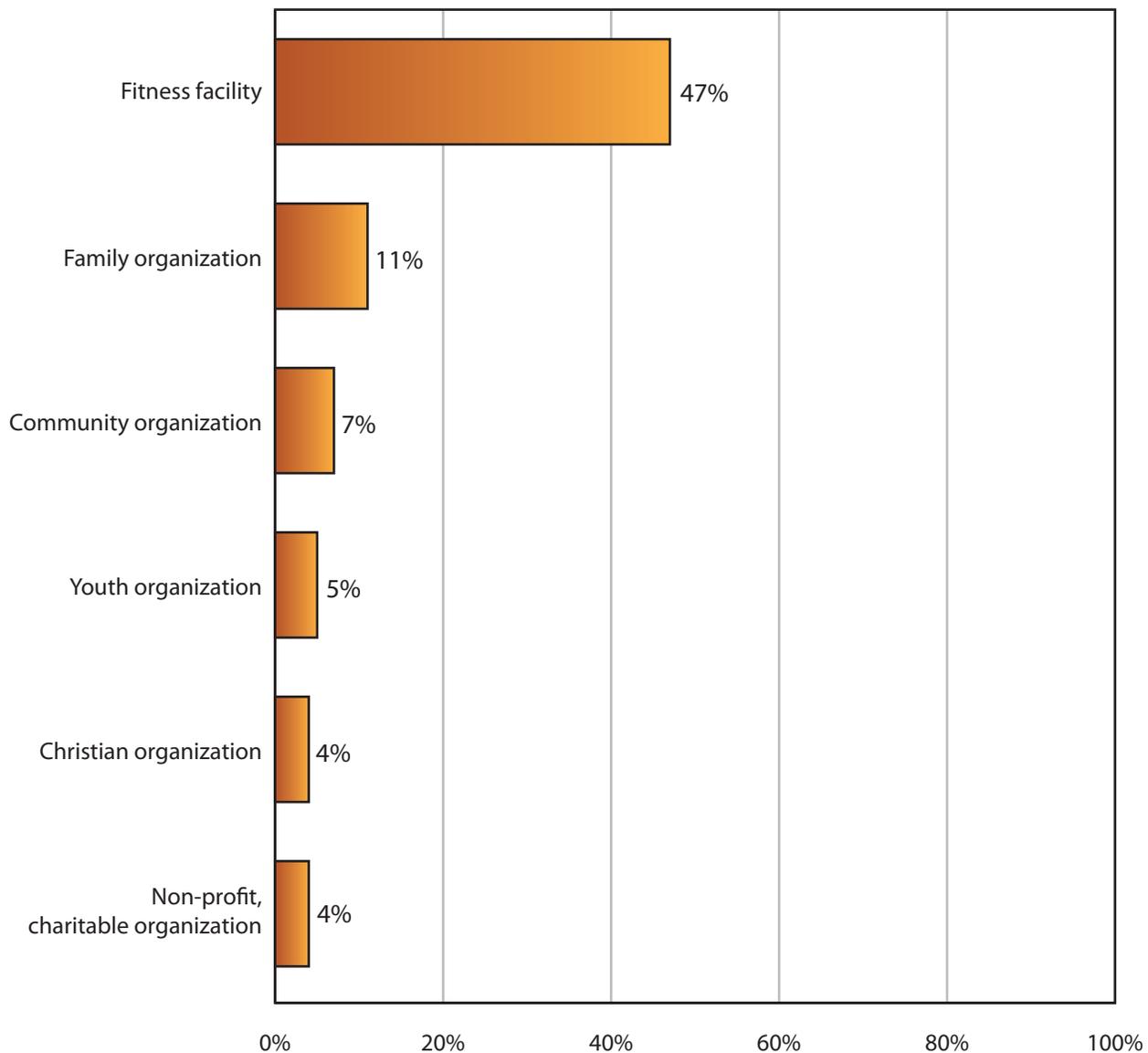


Figure 4.01 Awareness of the YMCA among Area Residents

Image of the YMCA among Area Residents

The following graph shows how area residents would characterize the YMCA.

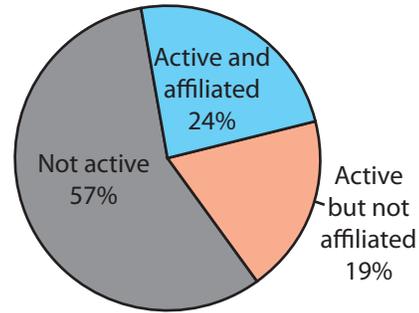
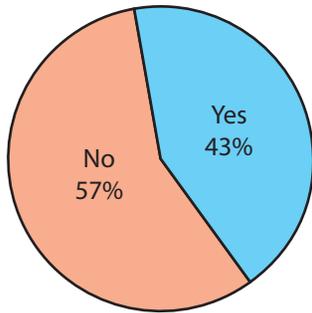


Note: *Men's center* and *new facility* were also cited.

Figure 4.02 Image of the YMCA among Area Residents

Area Residents' Activities and Affiliations

The left column shows the percentage of residents currently involved in physical or recreational activities and lists the top activities. The right column shows the percentage of residents who currently belong to or are affiliated with a public or private health, fitness, or recreational facility, while the table lists the top options.



Top Fitness and Recreation Activities (percentage of respondents/multiple responses)

Walking/running	21%
Workout equipment/weights	12%
Aerobics	6%
Swimming	6%
Yoga/stretching/toning	4%
Various exercise	4%
Cycling	3%
Basketball	2%
Golf	2%
Hiking/camping	2%
Working in yard/gardening	2%

Top Fitness and Recreation Activities (percentage of respondents/multiple responses)

For-profit providers	8%
Big Cats Gym	
Curves	
Snap Fitness	
Powerhouse	
Other nonprofit providers	2%
Area country club	
Area parks and recreation department	
Work/home/school	2%
Own equipment/workout at home	
YMCA	11.8%
David YMCA	
Green YMCA	

Note: Baseball/softball, fishing/hunting, hockey/ice hockey, soccer, and tennis were also cited.

Active refers to those area residents who said they were currently involved in physical or recreational activities.
Not active refers to those who said they weren't currently involved in physical or recreational activities

Figure 4.03 Residents' Fitness Activities and Affiliations

Health Statements of All Area Residents

The following graph shows the responses of all area residents to the three statements given, indicating the presence of “health seekers”.

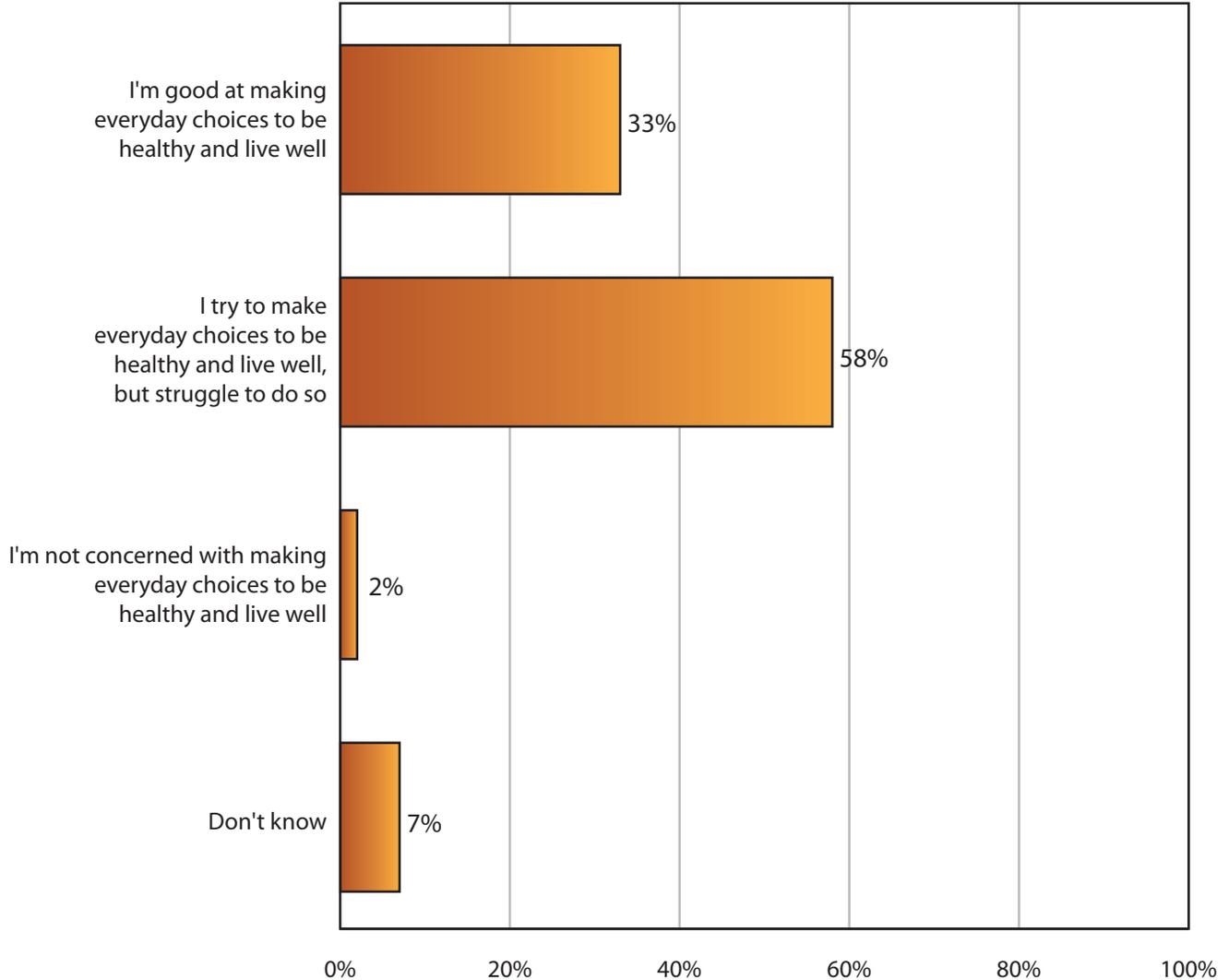


Figure 4.04 How All Area Residents Evaluated Their Health and Wellness Choices

Chapter Five

Membership Projections

This data can be used to

- Determine how many households will join
- Develop a pricing strategy
- Plan budgets based on membership and revenue forecasts

Overview

To determine the opportunities for a new Canal Fulton Family YMCA, FourSquare Research conducted telephone interviews with 686 households in the targeted survey area. Among all households randomly selected, 600 households were taken through the in-depth interview. Forty (40) households were currently members of YMCAs and were not taken through the in-depth interview but were instead asked just a few questions. Forty-six (46) households declined to participate in the in-depth interview for various reasons.

Location

The survey was designed to test the level of interest in joining a new Canal Fulton Family YMCA at the following proposed locations:

- a new YMCA in **Canal Fulton** on Locust Street between the senior center and safety center
- a new YMCA at **Arcadia Street** and Route 21
- a new YMCA at **Northwest High School** on Erie Avenue North

The existing David YMCA of Jackson Township was also cited as a location option. Respondents that chose the David YMCA as their first choice were not taken through the rest of the in-depth interview.

Facility Features

The following table details the facilities, programs, and services included as part of membership.

Features Include:
<ul style="list-style-type: none">• a state-of-the-art fitness area with the latest cardiovascular and muscle-strengthening equipment
<ul style="list-style-type: none">• exercise studios with many group exercise classes
<ul style="list-style-type: none">• personalized health and fitness plan
<ul style="list-style-type: none">• free babysitting while parents work out
<ul style="list-style-type: none">• programs for children and teens
<ul style="list-style-type: none">• many health programs
Other Facility Features Tested to Determine Additional Interest in Joining (respondents were asked which feature they prefer as first choice & second choice)
<ul style="list-style-type: none">• an indoor multipurpose gymnasium for basketball, volleyball, and many other indoor sports
<ul style="list-style-type: none">• an indoor recreation pool for family swimming, lessons, and water aerobics
<ul style="list-style-type: none">• an indoor walking and running track

Figure 5.01 Facility Features

Pricing Options

The following table details the pricing options quoted for each membership category. Respondents were quoted monthly membership rates based on their preference for a particular membership category defined below.

The rates in

- **purple** represent the **current regional rates** that allow use of all YMCAs in the region
- **pink** represent possible **new, lower branch-only rates** that would allow use of only the new Canal Fulton Family YMCA

Membership Category	Monthly Rates
Youth ages 6–12	\$18— \$14
Teen/young adult ages 13–23	\$25— \$20
Individual adult age 24 or over	\$40— \$32
Senior age 65 or older	\$34— \$27
Family	\$59— \$47
Senior couple	\$44— \$35

Figure 5.02 Pricing Options

Determining the Number of Households to Be Used in Forecasting

To determine the number of households to be used in forecasting, we subtract the number of households in the targeted survey area that currently belong to a YMCA from the projected number of households in the area for the year 2017 (see Figure 5.03 below).

Projected Number of Households in the Area for the year 2017	–	Number of Households that Belong to a YMCA	=	Adjusted Number of Households
17,925*		2,136		15,789

Figure 5.03 Formula for Calculating the Adjusted Number of Households

Information provided by the client at the start of the project revealed there are 1,775 current membership units of the David YMCA and 361 current membership units of other YMCAs in the targeted survey area. Excluding all these current member households, the **adjusted number of households** in the survey area that will be used in forecasting is **15,789**.

Given the percentage of households with *a great deal of interest* in an annual membership, we can determine the number of households in the targeted survey area with the highest level of interest in an annual membership. We use the following formula (see Figure 5.04 below) to forecast the number of households with *a great deal of interest*.

% of Respondents With <i>A Great Deal of Interest</i>	x	Adjusted Number of Households	=	Number of Households with <i>A Great Deal of Interest</i>
--	---	----------------------------------	---	--

Figure 5.04 Formula for Calculating the Number of Households that Will Join

*See Population Trends Analysis, page 18.

Note: Additional sources used in verifying the population data included DemographicsNow.com.

Forecast of Households for a New Canal Fulton Family YMCA Before Location Preference Is Taken Into Consideration

The following table calculates the number of households with *a great deal of interest* in joining the new Canal Fulton Family YMCA before location is taken into consideration. The table below also illustrates the forecast of households with *a lot of interest* in joining – the second-highest level of interest in joining. The rates quoted to respondents are outlined in Figure 5.02 on page 31.

Pricing	Percentage of Households with <i>A Great Deal of Interest</i> = 6.8%	X	Adjusted Number of Households	=	Number of Households with <i>A Great Deal of Interest</i>
Current regional rates	3.6%	X	15,789	=	568
Current regional rates PLUS 1 st -choice additional feature*	0.3%	X	15,789	=	47
Current regional rates PLUS 1 st - & 2 nd -choice additional features*	0.1%	X	15,789	=	16
New, lower branch-only rates	2.8%	X	15,789	=	442
Forecast of Households with <i>A Great Deal of Interest</i> in Joining a New Canal Fulton Family YMCA Before Location is Taken into Consideration					1,073
Forecast of Households with <i>A Lot of Interest</i> in Joining a New Canal Fulton Family YMCA Before Location is Taken into Consideration					300

Note: These forecasts do not take into account prospective new members who may terminate their memberships.

*The preference for additional facility features is illustrated in Figure 5.09 on page 37.

Figure 5.05 Forecast of Households for a New Canal Fulton Family YMCA Before Location is Taken Into Consideration

Location Preference among Prospective Members

The graph below shows the preference among prospective members with *a great deal of interest* in joining the new Canal Fulton Family YMCA to join at one of the three locations cited. The percentages reflect prospective members' preference for each location as first choice or second choice. The study did not find any prospective members who said that all locations were equally preferred.

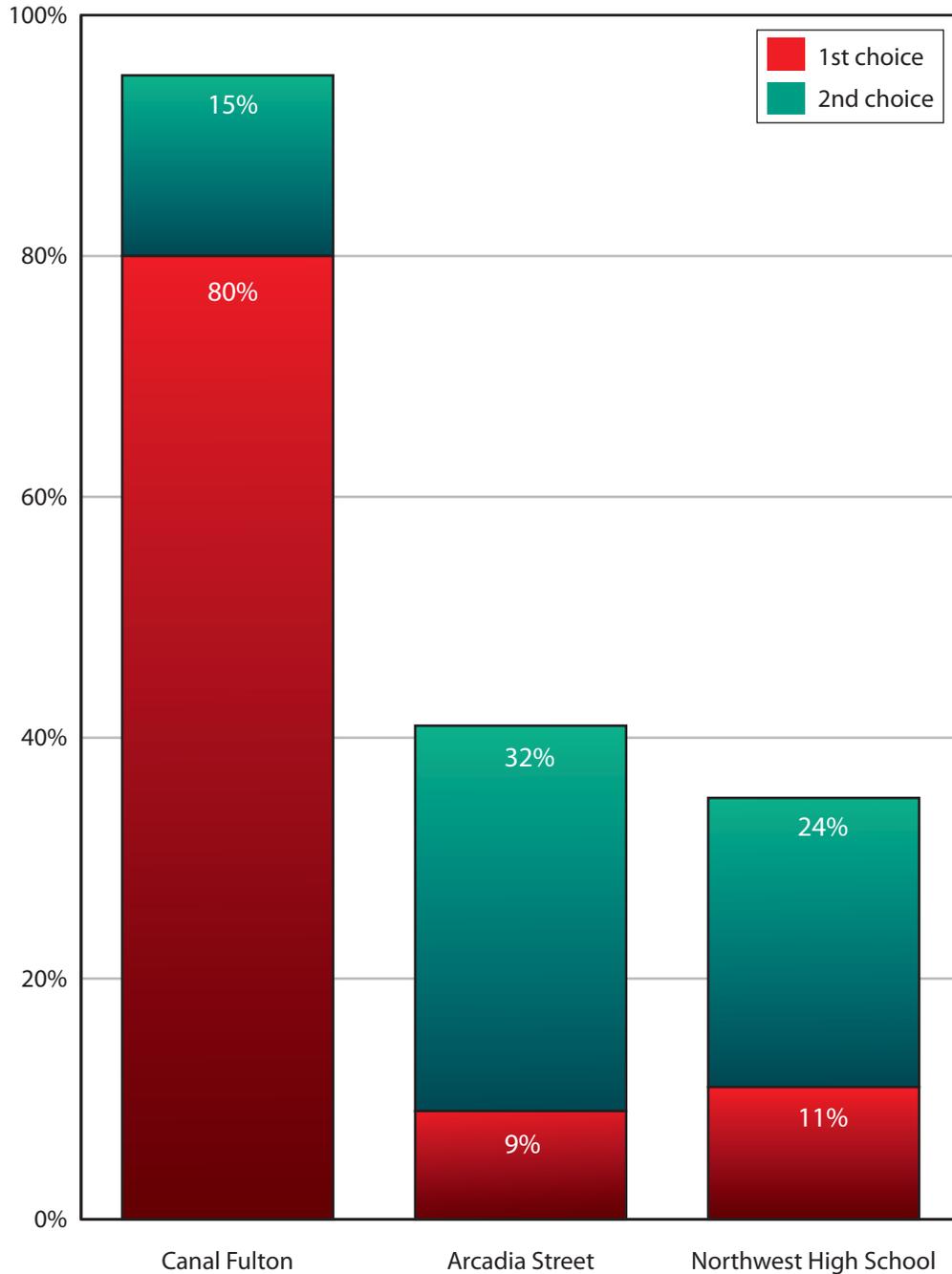


Figure 5.06 Location Preference among Prospective Members

Forecasts of Households with *A Great Deal of Interest* in Joining Each New Location

The following graph shows the location preference among prospective members of the new Canal Fulton Family YMCA at the three locations cited. The forecasts for each location are calculated by multiplying 1,073 households (number of households with *a great deal of interest* in joining a new Canal Fulton Family YMCA before location is considered, Figure 5.05, page 33) by the percentage of prospective members that prefer each location (Figure 5.06, previous page).

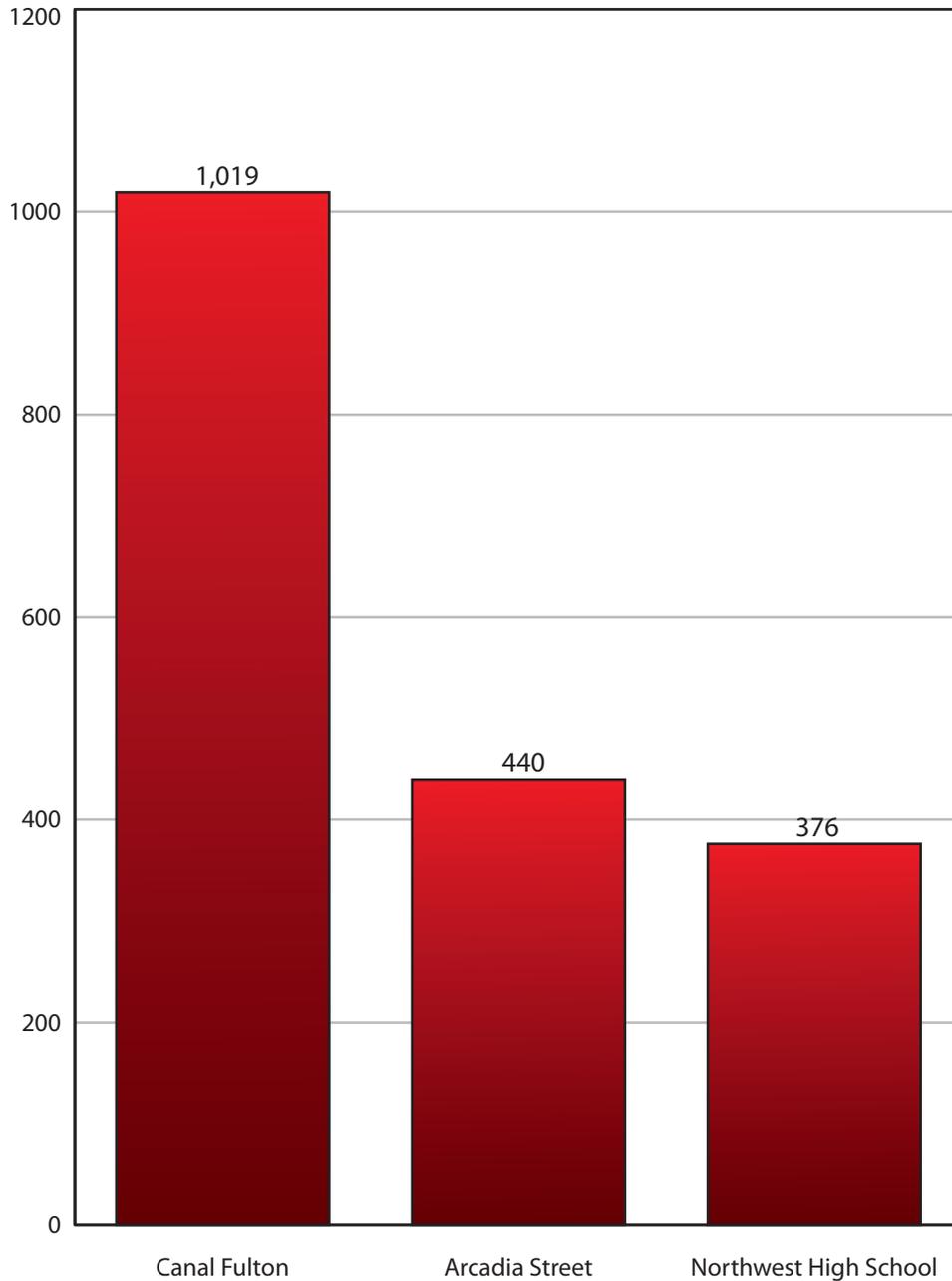
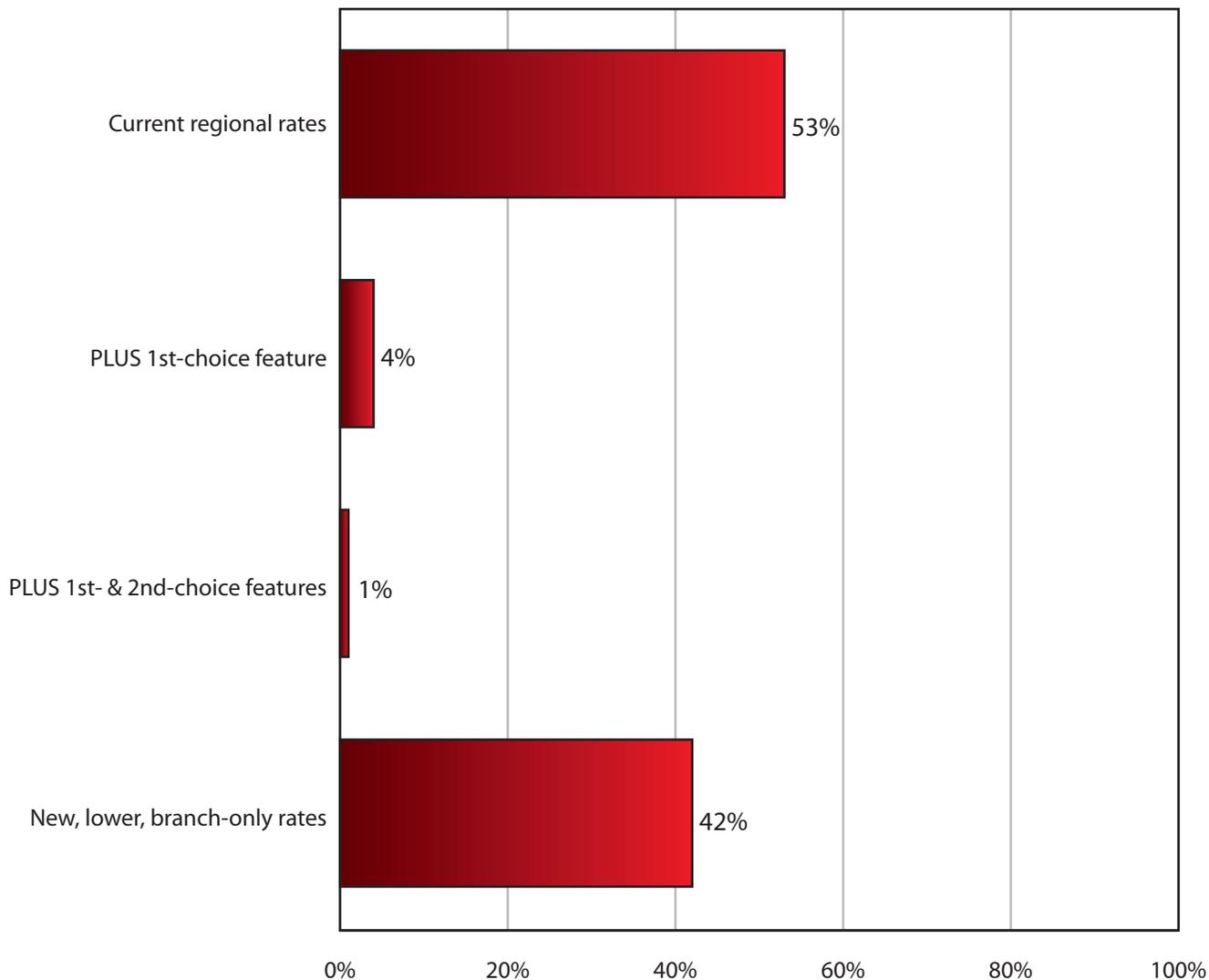


Figure 5.07 Forecast of Households with A Great Deal of Interest in Joining Each Location

Pricing and Facility Preference among Prospective Members

The graph below shows the willingness of prospective members with a *great deal of interest* in joining a new Canal Fulton Family YMCA at the pricing and facility options offered.



Note: The preference for additional facility features is illustrated in Figure 5.09 on the next page.

Figure 5.08 Pricing and Facility Preference among Prospective Members

Preference for 1st-Choice & 2nd-Choice Additional Facility Features

The graph below illustrates the preference for 1st-choice and 2nd-choice additional facility features among prospective members that prefer to join only if these features were included.

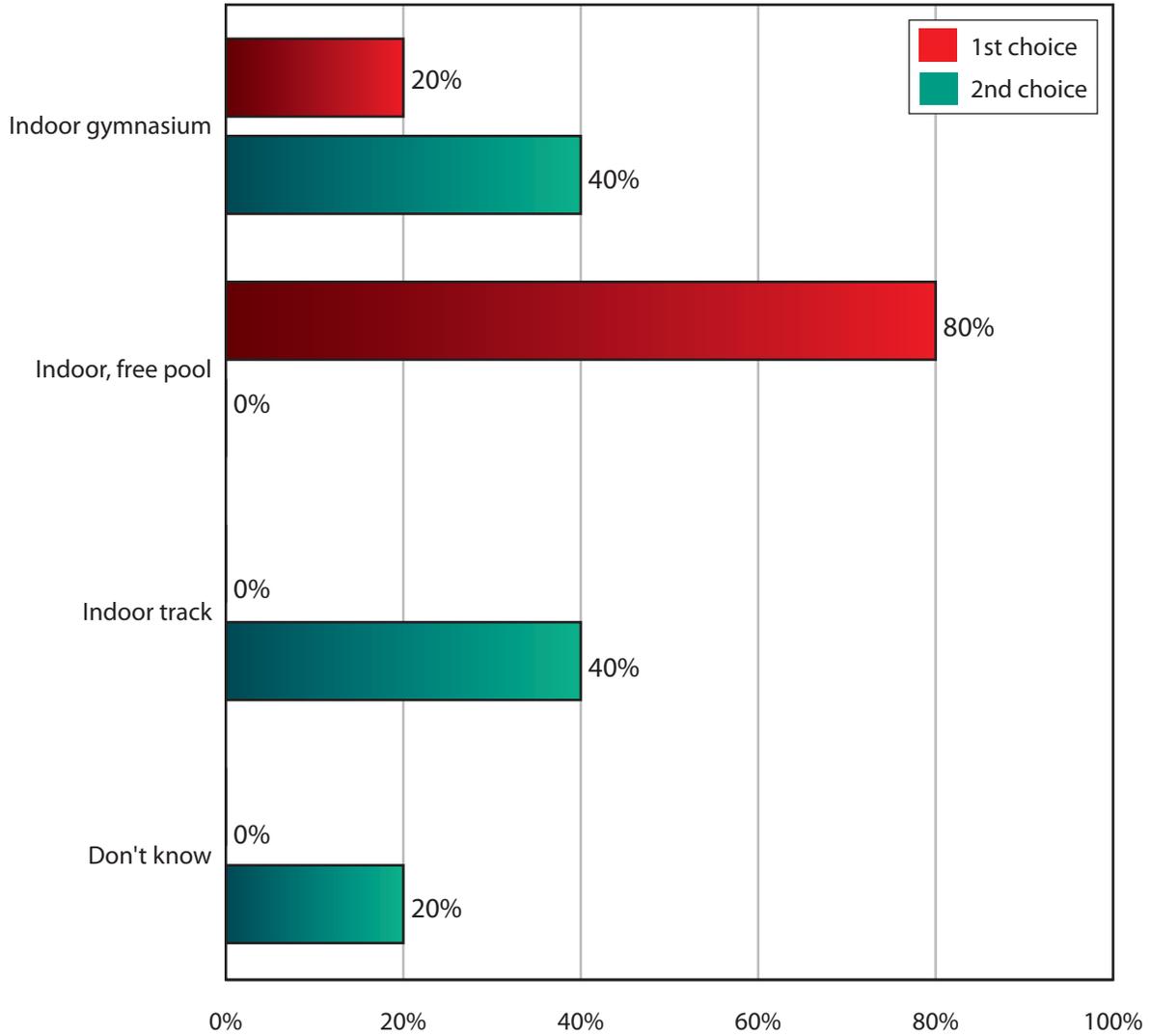


Figure 5.09 Preference for 1st-Choice & 2nd-Choice Additional Facility Features

Forecast of Annual Revenue Generated from New Memberships Sold at a New Canal Fulton Family YMCA

The following table (Figure 5.10) illustrates the formula used to forecast the annual revenue generated from new memberships sold (not retained) at a new Canal Fulton Family YMCA at each location. Please note that the forecasts do not include revenues from joining fees nor program participation.

Number of Households at Each Pricing Option	X	Percentage of Prospective Members for Each Membership Category	X	Annual Rate	=	Revenue Generated
Forecast of household units at each pricing option	X	1% youth memberships	X	\$	=	\$
	X	1% teen/young adult Memberships	X	\$	=	\$
	X	18% individual adult memberships	X	\$	=	\$
	X	4% senior memberships	X	\$	=	\$
	X	60% family memberships	X	\$	=	\$
	X	16% senior couple memberships	X	\$	=	\$
Forecast of Annual Revenue Generated from New Memberships Sold						\$

Note: Revenue loss from members terminating during their first year would need to be subtracted from this amount.

Figure 5.10 Formula Used to Calculate Annual Revenue

Forecast of Annual Revenue Generated from New Memberships Sold at a New Canal Fulton Family YMCA (continued)

The graph below illustrates the forecast of revenue from annual memberships for each location.

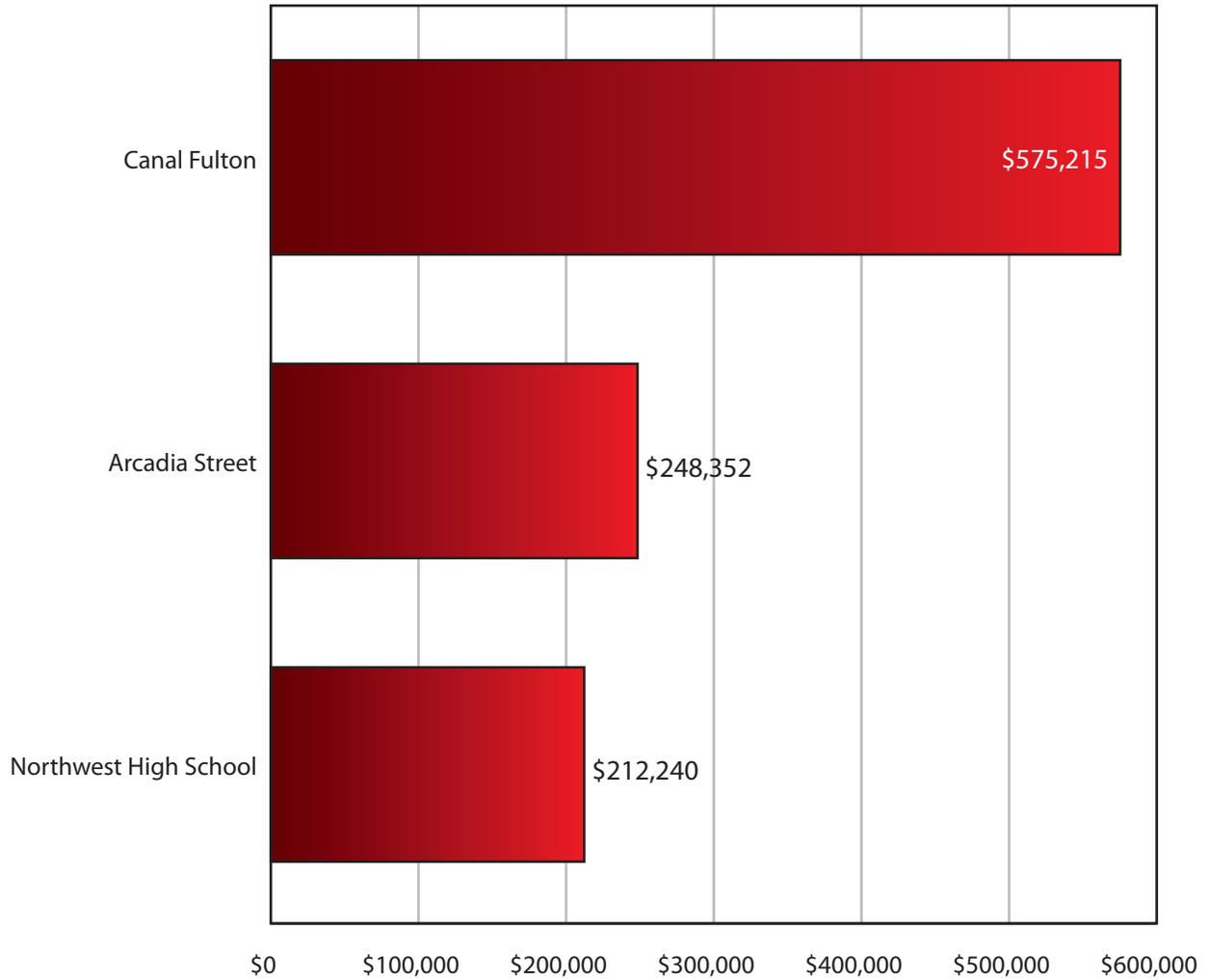


Figure 5.11 Forecast of Annual Revenue Generated from New Memberships

Membership Projections Summary

The table below summarizes the findings of the market research study that forecasts the demand for a new Canal Fulton Family YMCA.

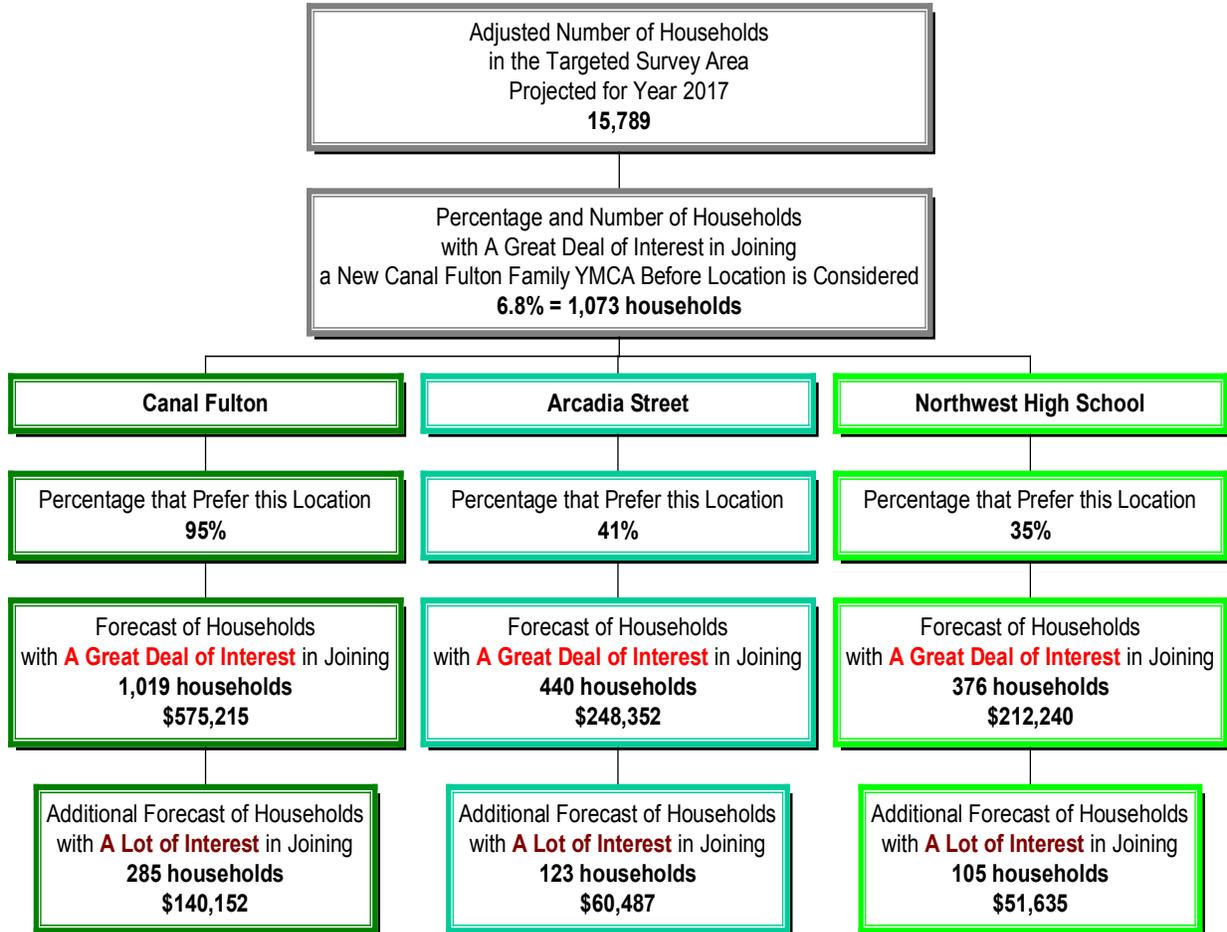


Figure 5.12 Membership Projections Summary

Reasons Area Residents Are Not Interested in Joining a New Canal Fulton Family YMCA

The following table shows the reasons why area residents who do not currently belong to a YMCA are not interested in joining a new Canal Fulton Family YMCA.

Response Item	Percentage of Those Not Interested (multiple responses OK)
Lack of Interest/Personal Barriers	81%
Just not interested	35%
Wouldn't use	24%
No time	9%
Too old	8%
Health problems	3%
Former member	1%
Don't like gyms/crowds	1%
Satisfied with Current Affiliation/Situation	14%
Satisfied where I currently belong	11%
Own equipment/exercise at home	2%
Prefer outdoor activities	1%
Location-Related	3%
Location not convenient	2%
Moving/visiting	1%
Money-Related	1%
Costs too much	1%
Need Additional Information	1%
Would like to see Y first	1%

Figure 5.13 Reasons Area Residents Not Interested in Joining

Chapter Six

Profile of Prospective Members

This data can be used to

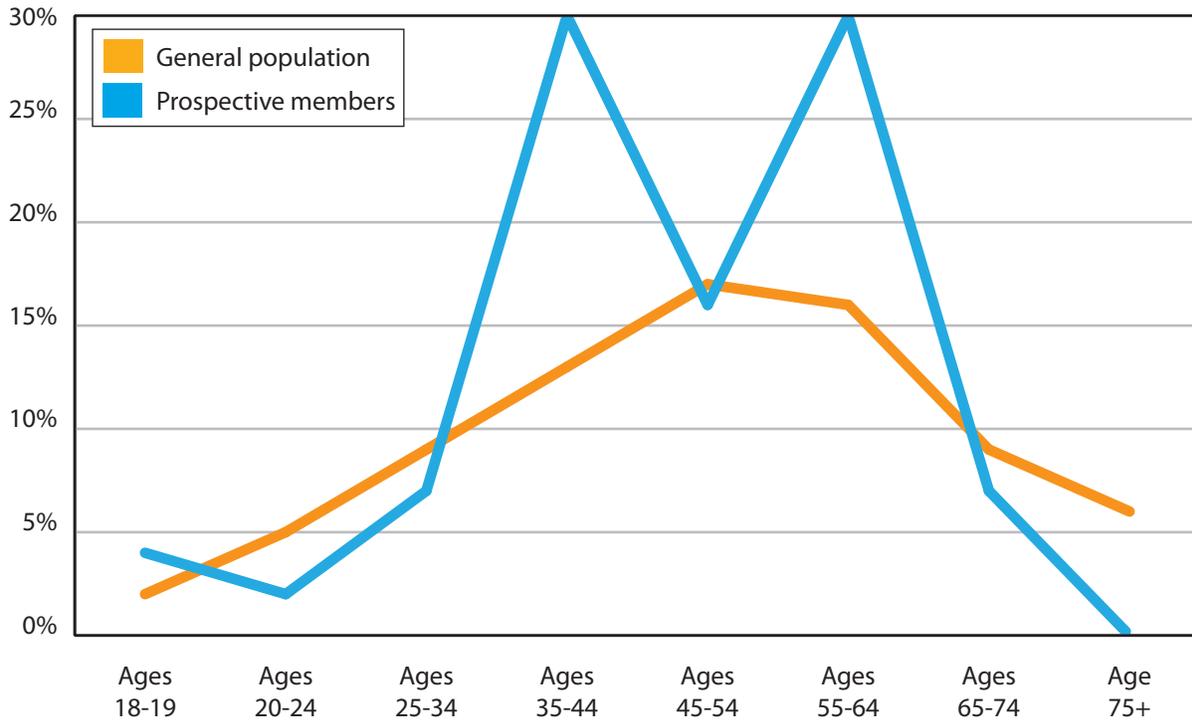
- Develop a marketing plan targeting specific member groups

Prospective members are area households with at least *a lot of interest* in joining a Canal Fulton Family YMCA.

Age of Prospective Members

The following table and graph show the ages of adult prospective members and the general population.

Age	General population	Prospective members*
Ages 18–19	2%	4%
Ages 20–24	5%	2%
Ages 25–34	9%	7%
Ages 35–44	13%	30%
Ages 45–54	17%	16%
Ages 55–64	16%	30%
Ages 65–74	9%	7%
Ages 75+	6%	—



*4% of prospective members declined to answer.

Figure 6.01 Age of Adult Prospective Members and the General Population

Membership Categories of Prospective Members

The following chart shows the membership categories preferred by prospective members.

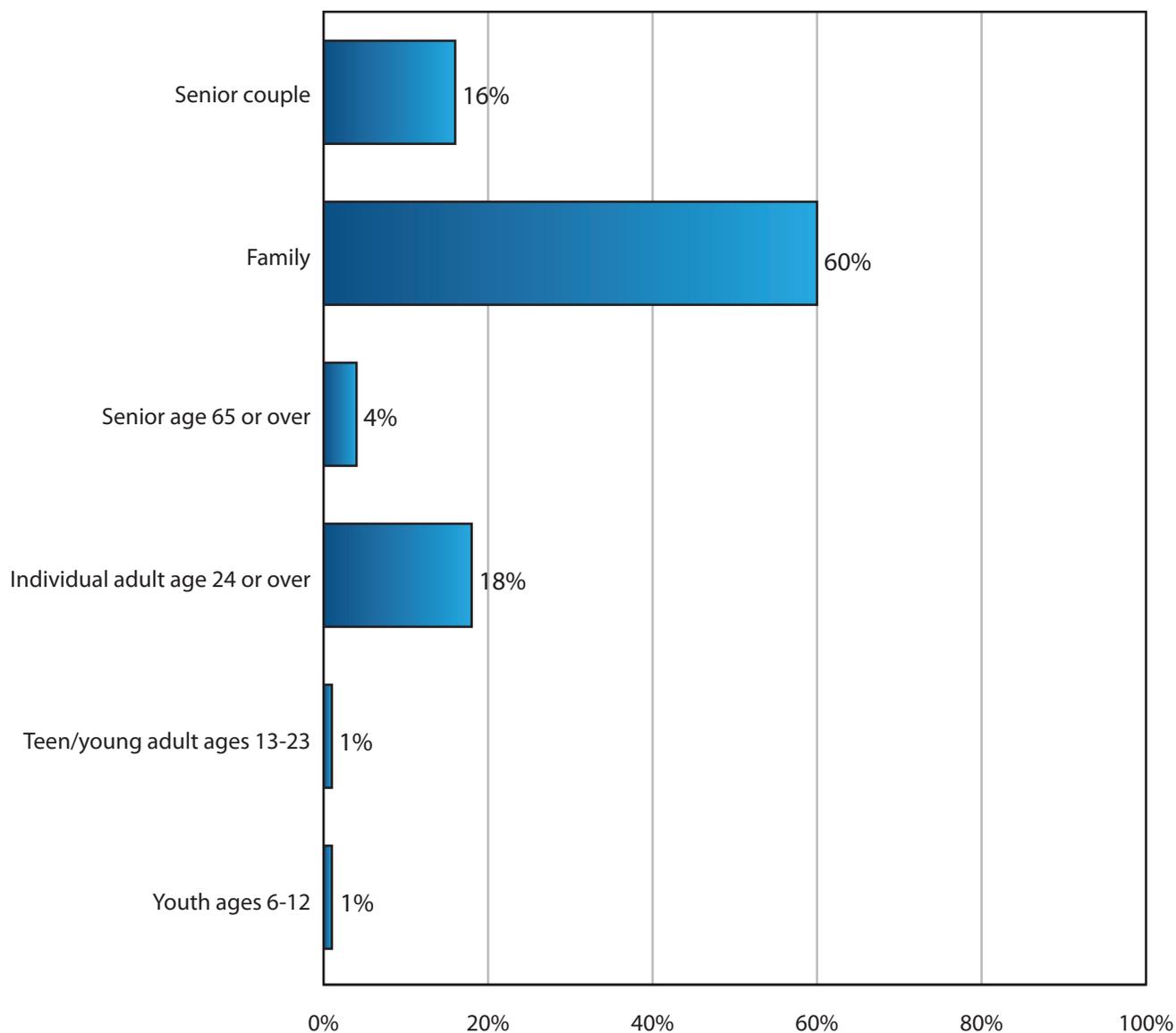
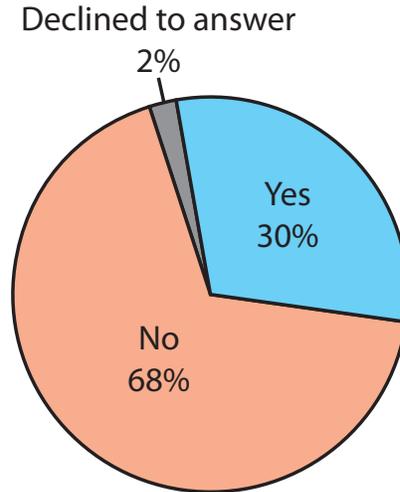


Figure 6.02 Membership Categories of Prospective Members

Percentage of Prospective Members with Children in the Household

The chart below shows the percentage of prospective members with children under age 18 in their households.



Note: Nationally, 34% of all households have children under age 18 in the household.

Figure 6.03 Prospective Members with Children Under Age 18 in Their Households

Census Tract Locations of Prospective Members

The following map defines the census tract locations of prospective members.

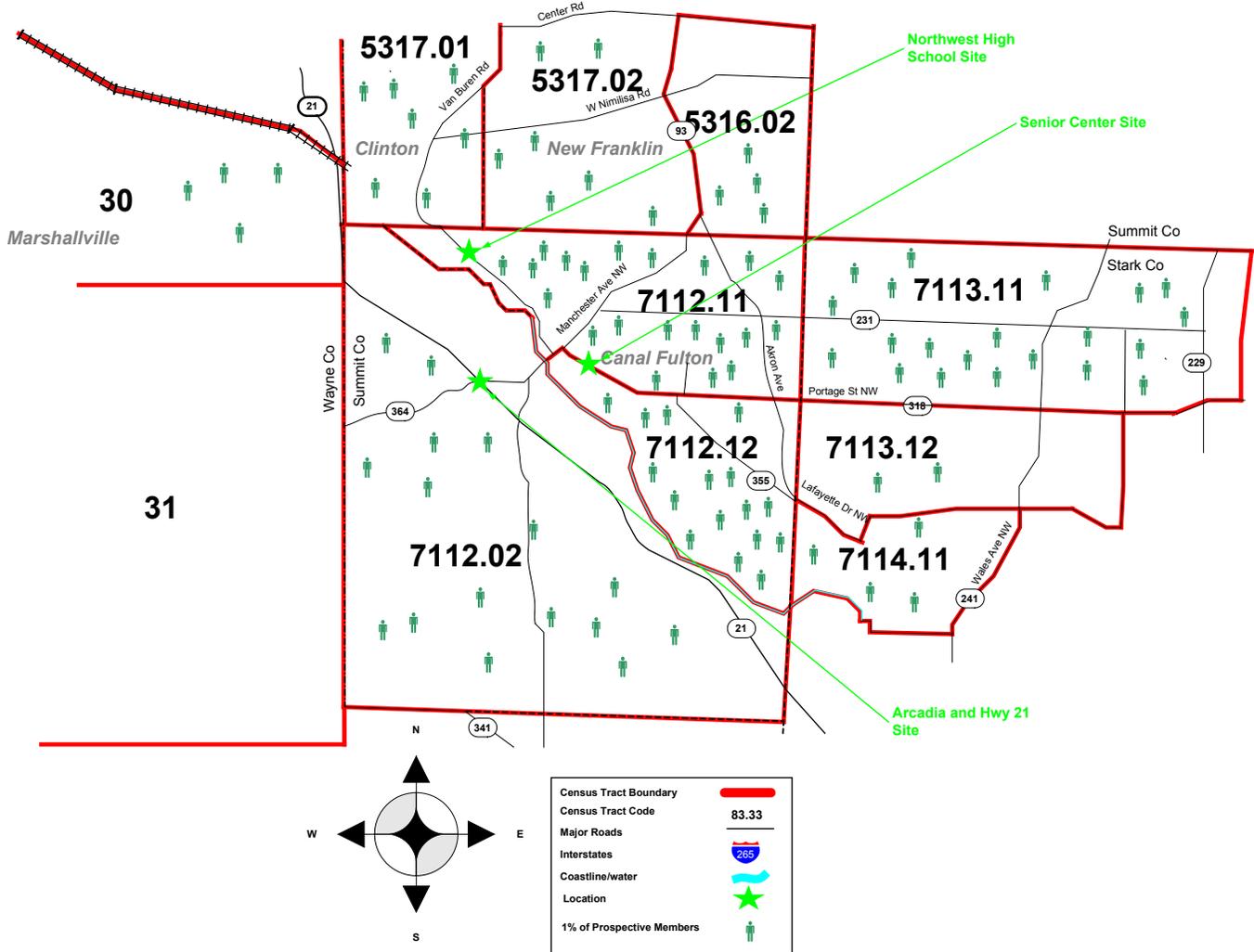


Figure 6.04 Census Tract Locations of Prospective Members

Ethnic Background of Prospective Members

The following chart shows the ethnic background of prospective members.

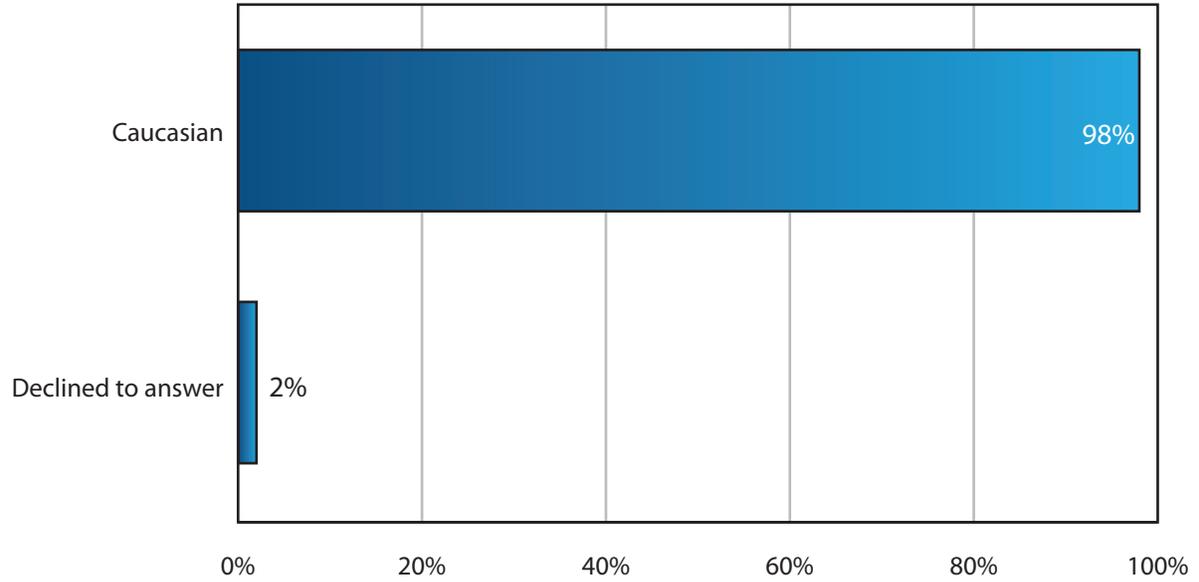


Figure 6.05 Ethnic Background of Prospective Members

Health Statements of Area Residents and Prospective Members

The following chart compares the responses of all area residents and prospective members to the three statements given, indicating the presence of “health seekers”.

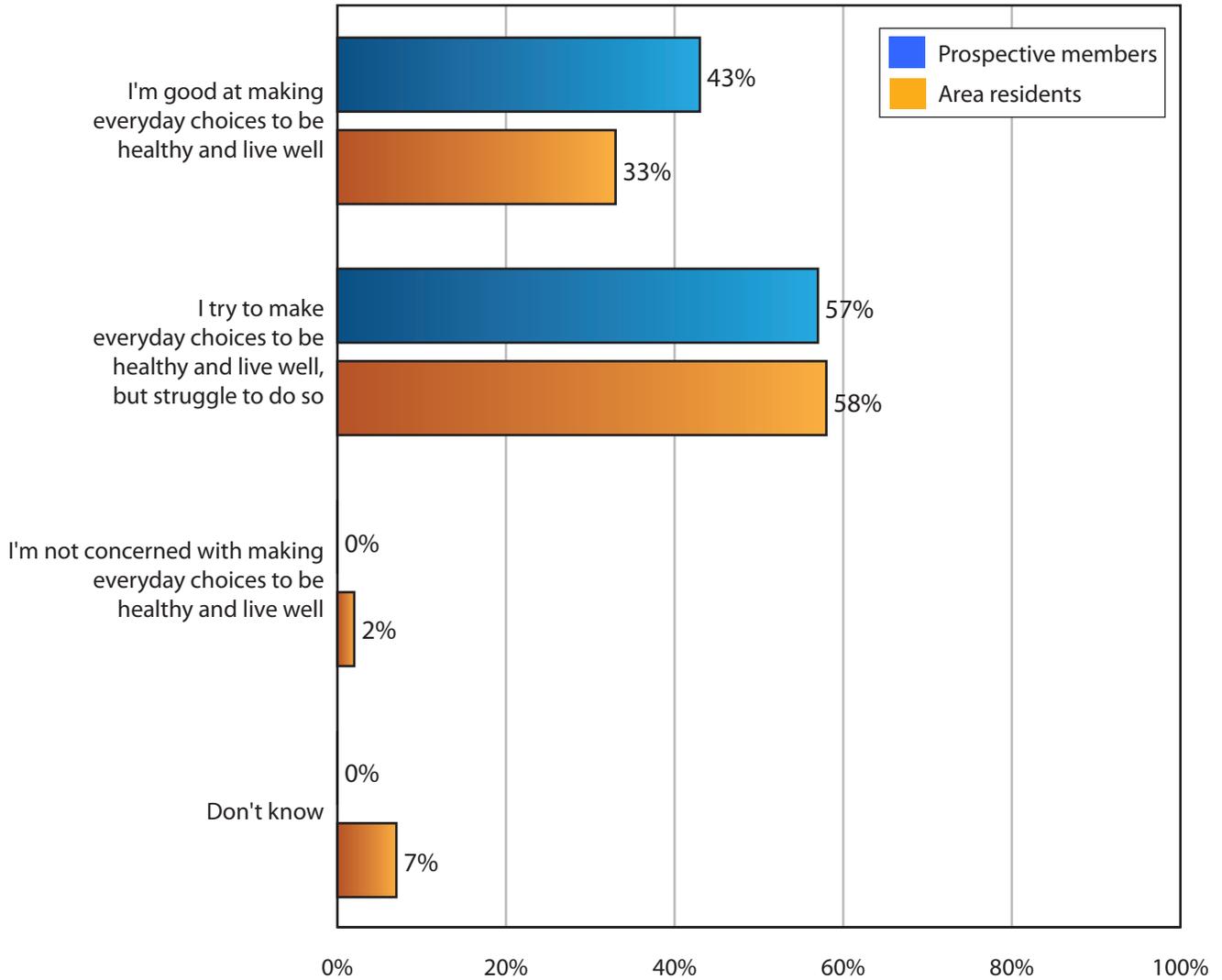


Figure 6.06 How Area Residents and Prospective Members Evaluated Their Health and Wellness Choices

Where Prospective Members and Area Residents Live

The following graph shows where prospective members and all respondents, respectively, said they live.

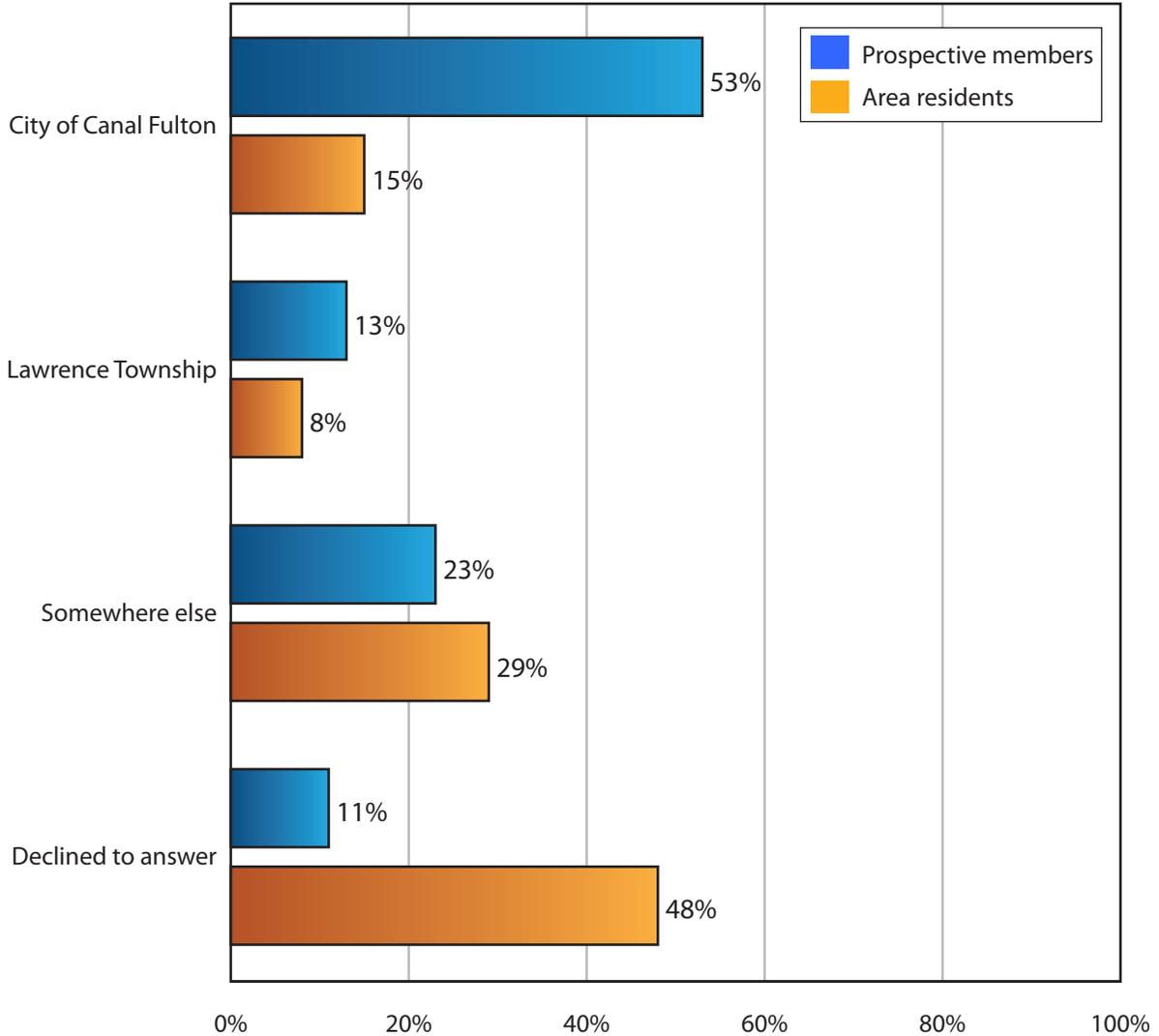


Figure 6.07 Where Prospective Members and Area Residents Live

Chapter Seven

Interest in Child Care and Family Activities

This data can be used to

- Prioritize program offerings
- Understand the size of each program
- Plan facility features based on program interest

Interest in Babysitting, Child Care, After-School, and Child Development Programs among Prospective Members

The following table shows the level of interest in child care, after-school, or child development programs among prospective members with children ages infant–13 in the household.

Baby-sitting, child care, after-school, or child development programs	Infant–2	3–5	6–9	10–13
Babysitting while parents work out	Very Low	Moderate	Low	
Y arts programs with crafts, plays, story time, and movement activities		Moderate	Low	
Parents' Night Out fun program for children at \$10/child		Low	Low	Low
Computer-assisted tutoring and homework help at the Y			Low	Very Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Note: *Playful movement activities and equipment exploration to build walking and coordination skills* was also tested but received insignificant interest.

Figure 7.01 Interest in Babysitting, Child Care, After-school, and Child Development Programs among Prospective Members

Interest in Summer Day Camps among Prospective Members

The following graph shows the level of interest in summer day camps at an average cost of \$100/week among prospective members with children under 18 in the household.

Summer day camp	3-5	6-9	10-13	14-17
Traditional summer day camp with swimming, games, and arts and crafts	Low	High	Moderate	
Creative arts camp with drawing, drama, and music	Low	Low	Very Low	
Full-day sports camp	Very Low	Low	Moderate	Low
Basketball		Very Low	Low	Low
Flag football		Very Low	Low	Low
Outdoor soccer		Low	Very Low	Very Low
T-ball/baseball/softball	Very Low	Low	Low	Very Low
Teen adventure camp with hiking, high ropes courses, and water sports			Moderate	Very Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Figure 7.02 Interest in Summer Day Camps among Prospective Members

Interest in Activities Parents and Children Can Do Together

The following chart shows the level of interest in recreational activities that parents can do together with children, such as Family Fun Night at the Y, family fitness classes such as Zumba, and a parent and child camp program like Adventure Guides.

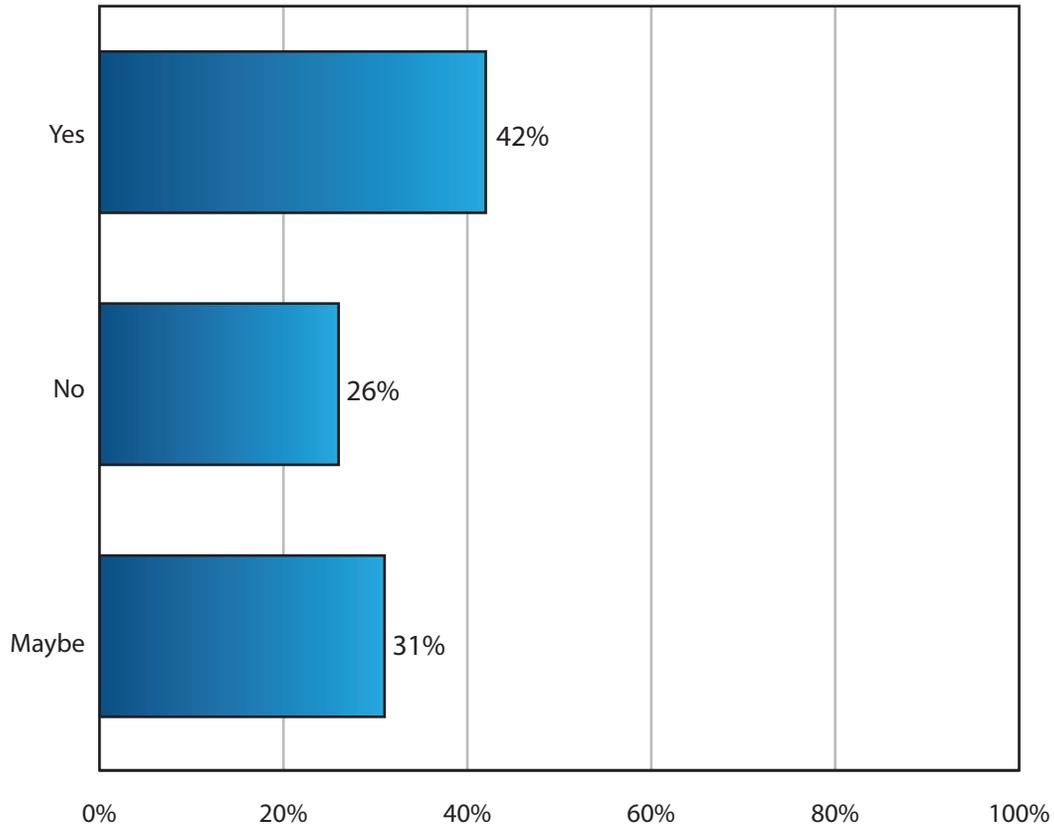


Figure 7.03 Interest in Activities Parents and Children Can Do Together

Chapter Eight
Interest in Sports and Recreation
for Children and Teens

Interest in Sports and Recreation Programs for Children and Teenagers among Prospective Members

The following table shows the level of interest among prospective members with children in sports and recreation programs for children of all ages at an average of \$30/8 weeks.

Sports and recreation programs	3-5	6-9	10-13	14-17
Gymnastics and tumbling	Moderate	Very Low		
Dance classes such as ballet, tap, or jazz	Low	Low		
Creative arts courses such as drawing, drama, and music	Very Low	Low	Very Low	
Video game-based cardio workout features such as Dance Dance Revolution and sports walls		Low	Low	Very Low
Conditioning program for sports			Low	Very Low

Very Low = <1% Low = 1%-4% Moderate = 5%-9% High = 10%-14% Very High = 15%+

Note: *Martial arts and self-defense classes* was also tested but received insignificant interest.

Figure 8.01 Interest in Sports and Recreation Programs for Children and Teenagers among Prospective Members

Interest in Indoor Sports Leagues for Children and Teenagers among Prospective Members

The following table shows the level of interest in sports leagues for children and teens – in which each child plays in at least half of the game and is taught skills, values, and sportsmanship – at about \$25/8 weeks.

Indoor sports leagues	3-5	6-9	10-13	14-17
Basketball	Very Low	Moderate	High	Low
Soccer	Very Low	Low	Very Low	Very Low
Tennis	Very Low	Very Low	Low	Very Low
Ice hockey	Very Low	Very Low	Very Low	Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Figure 8.02 Interest in Indoor Sports Leagues for Children and Teenagers among Prospective Members

Interest in Outdoor Sports Leagues for Children and Teenagers among Prospective Members

The following table shows the level of interest in outdoor sports leagues for children and teens such as baseball, soccer, tennis, and golf, at about \$25/8 weeks.

Outdoor sports leagues	3-5	6-9	10-13	14-17
Basketball	Very Low	Low	Low	Low
Soccer	Very Low	Low	Low	Very Low
Tennis	Very Low	Very Low	Low	Very Low

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Figure 8.03 Interest in Outdoor Sports Leagues for Children and Teenagers among Prospective Members

Chapter Nine

Interest in Special Programming for Teens

Interest in Social and Recreational Activities for Older Children and Teenagers among Prospective Members

The following table shows the level of interest in social and recreational activities for older children and teenagers among prospective members with children ages 10–17.

Social and recreational activities for older children and teenagers	10–13	14–17
Teen center with social and play areas and a homework station	Very High	Moderate
Fitness classes such as yoga, kickboxing, and weight training techniques	Very High	Moderate
Educational programs such as computer training, job training, tutoring, and mentoring programs such as Y Achievers	Low	Moderate

Very Low = <1% Low = 1%–4% Moderate = 5%–9% High = 10%–14% Very High = 15%+

Note: *Youth Obesity prevention program with exercise, nutrition, and lifestyle coaching* was also tested but received insignificant interest.

Figure 9.01 Interest in Social and Recreational Activities for Older Children and Teenagers among Prospective Members

Chapter Ten

Interest in Fitness and Wellness for Adults

Note: When percentages are presented in graphs on the following pages, the percentages represent the number of membership units that expressed an interest in this activity (e.g., 10% = 10% x 1,019 units = 101 units).

Interest in Fitness Activities for Adults

The following graph shows the level of interest in fitness activities for adults among prospective members.

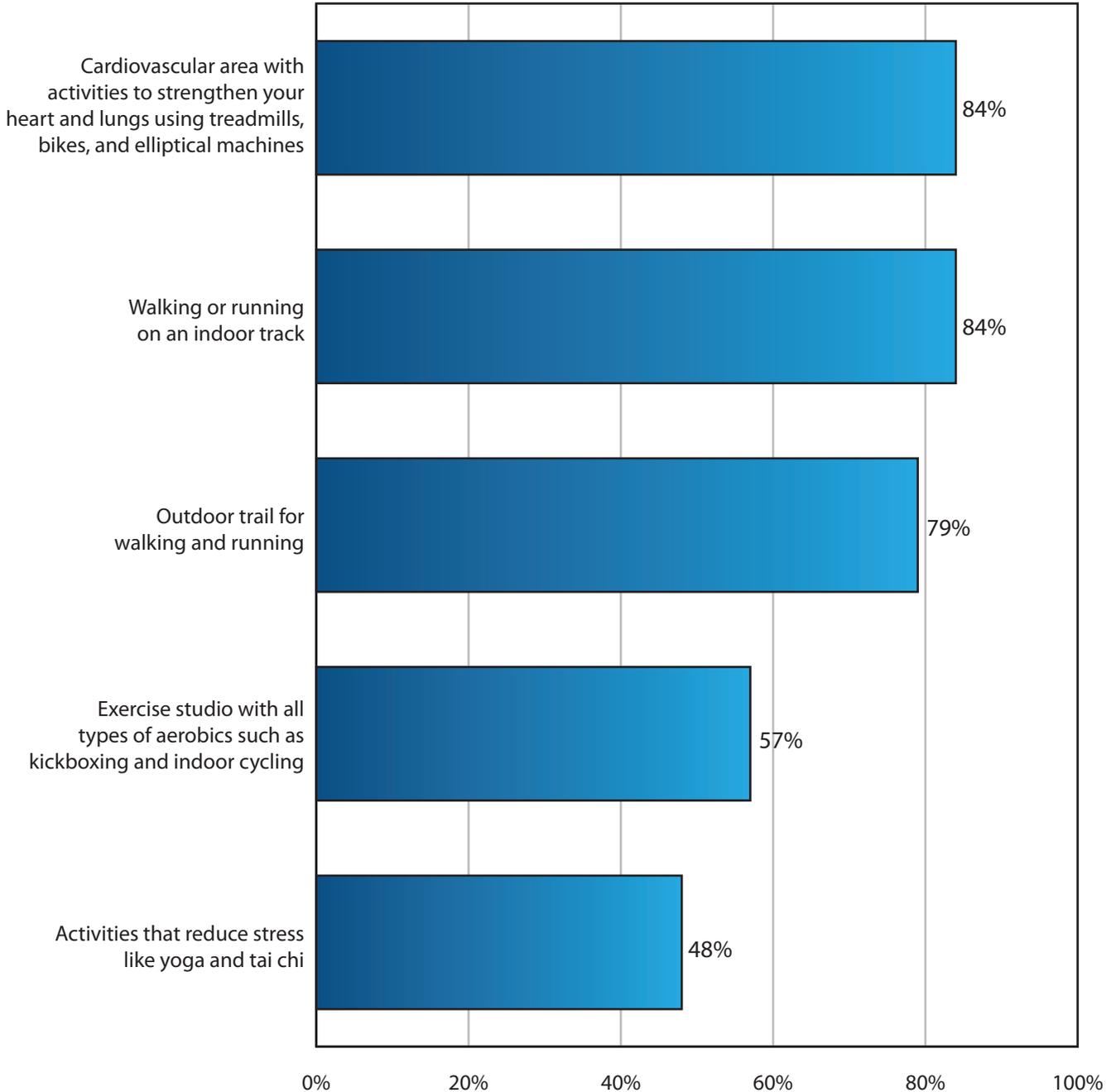


Figure 10.01 Interest in Fitness Activities for Adults

Interest in Fitness Activities for Adults (*continued*)

The following graph shows prospective members' interest in fitness activities for adults.

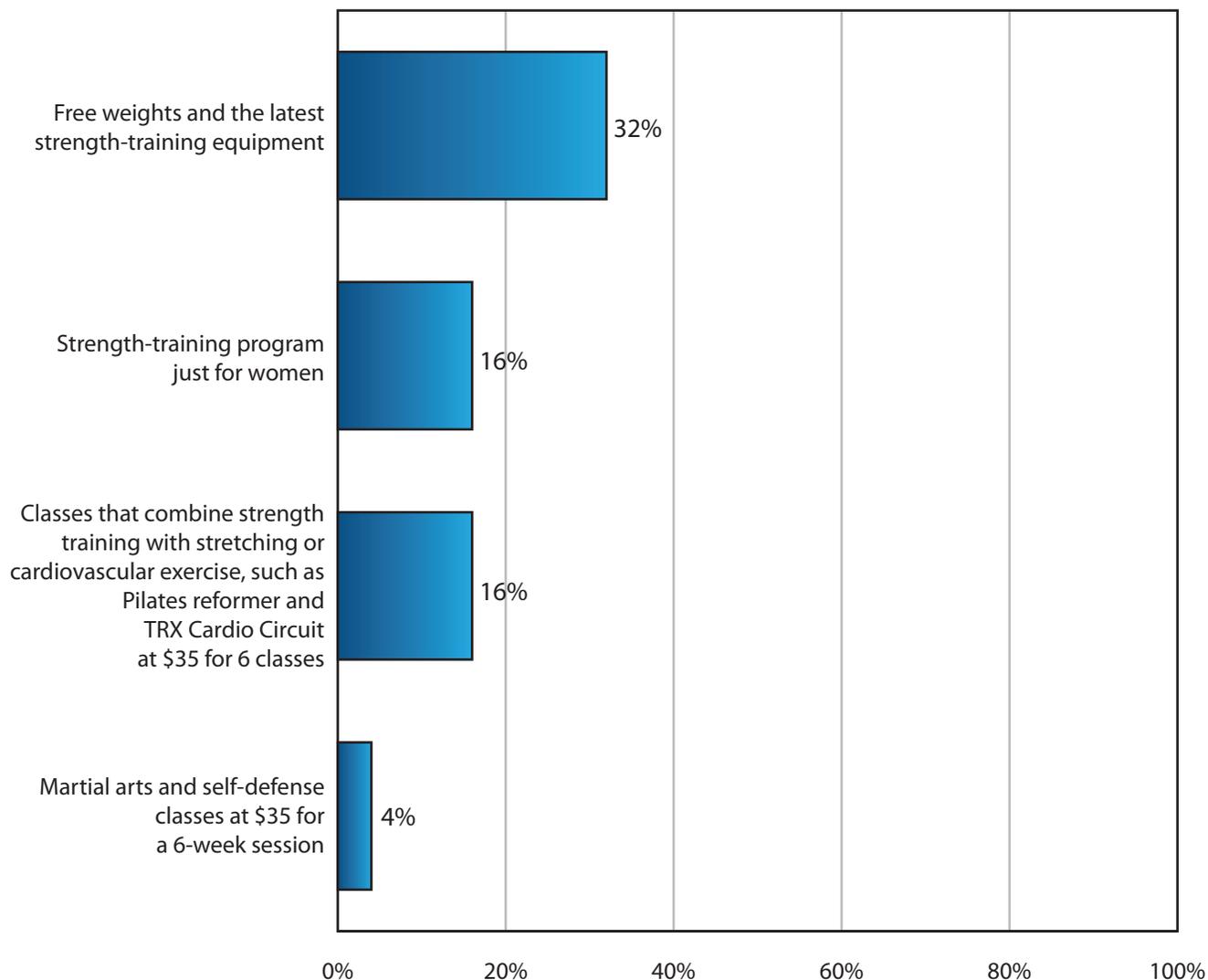


Figure 10.02 Interest in Fitness Activities for Adults (*continued*)

How Prospective Members Want to Be Served

The following graph shows how prospective members said they want to be served.

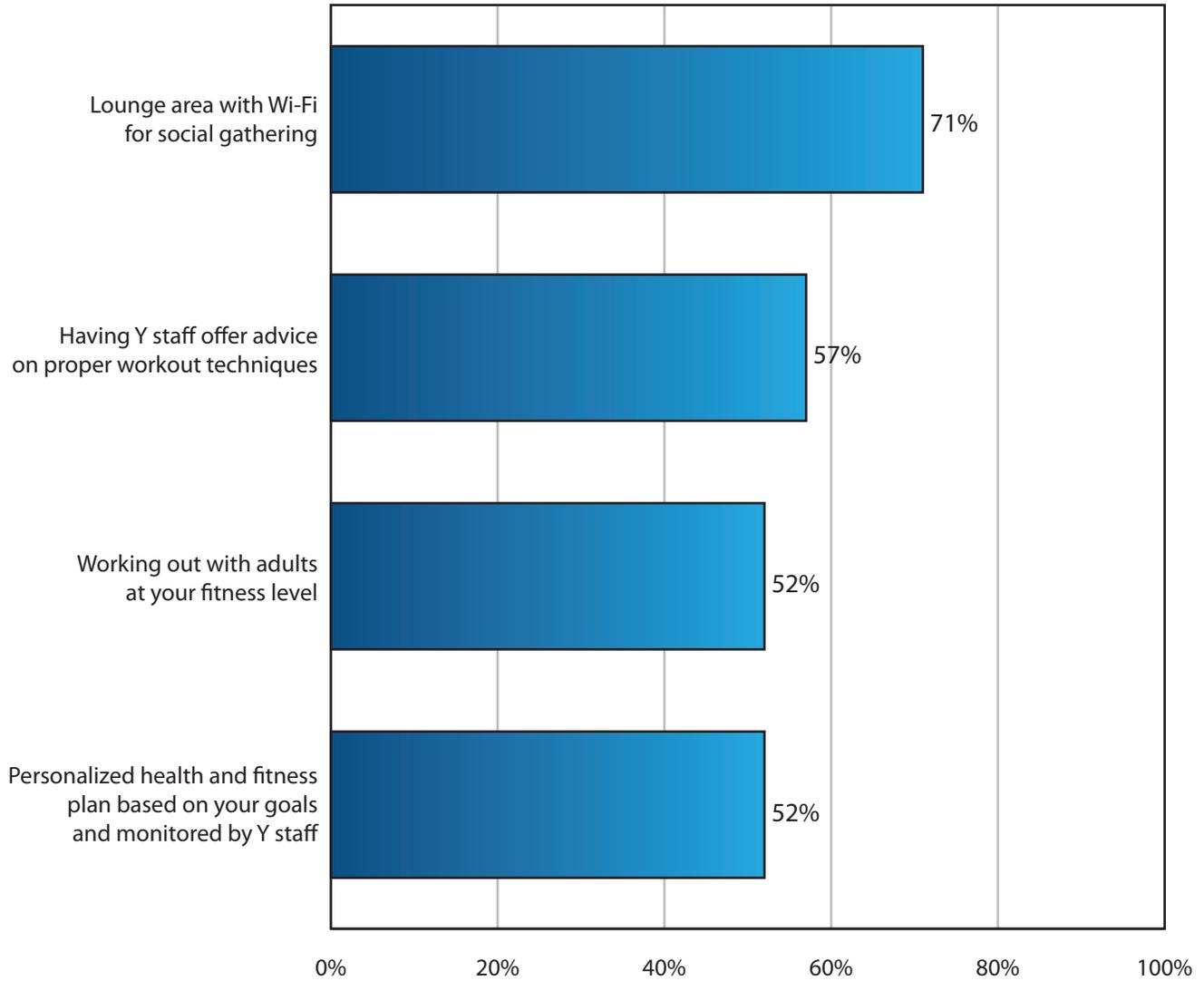


Figure 10.03 How Prospective Members Want to Be Served

Interest in Amenities among Prospective Members

The following graph shows the level of interest in amenities among prospective members.

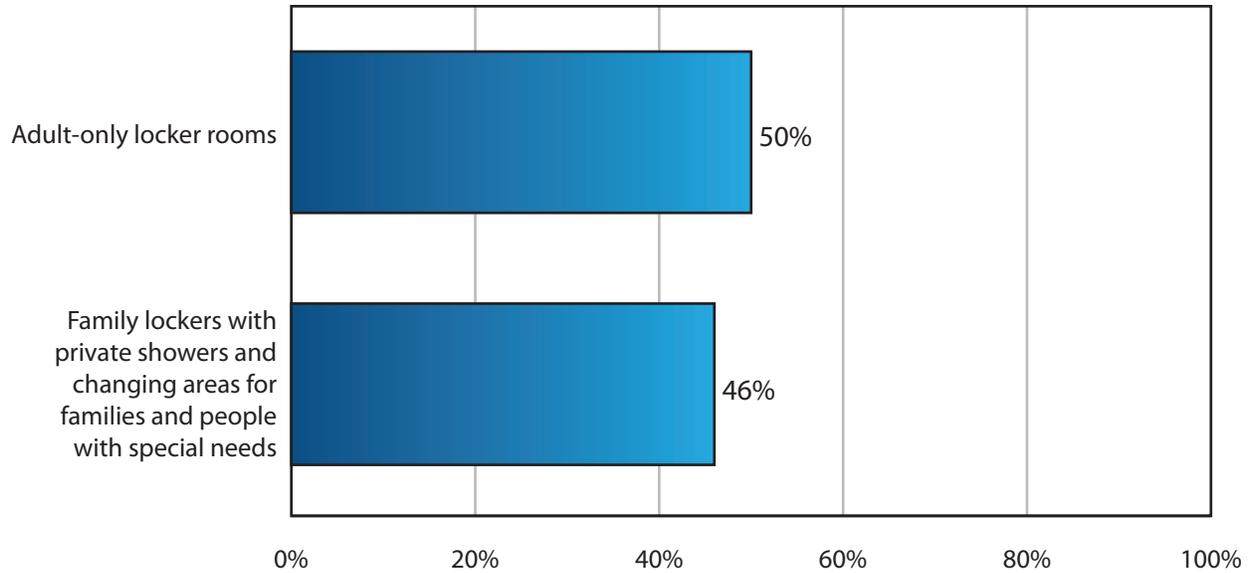
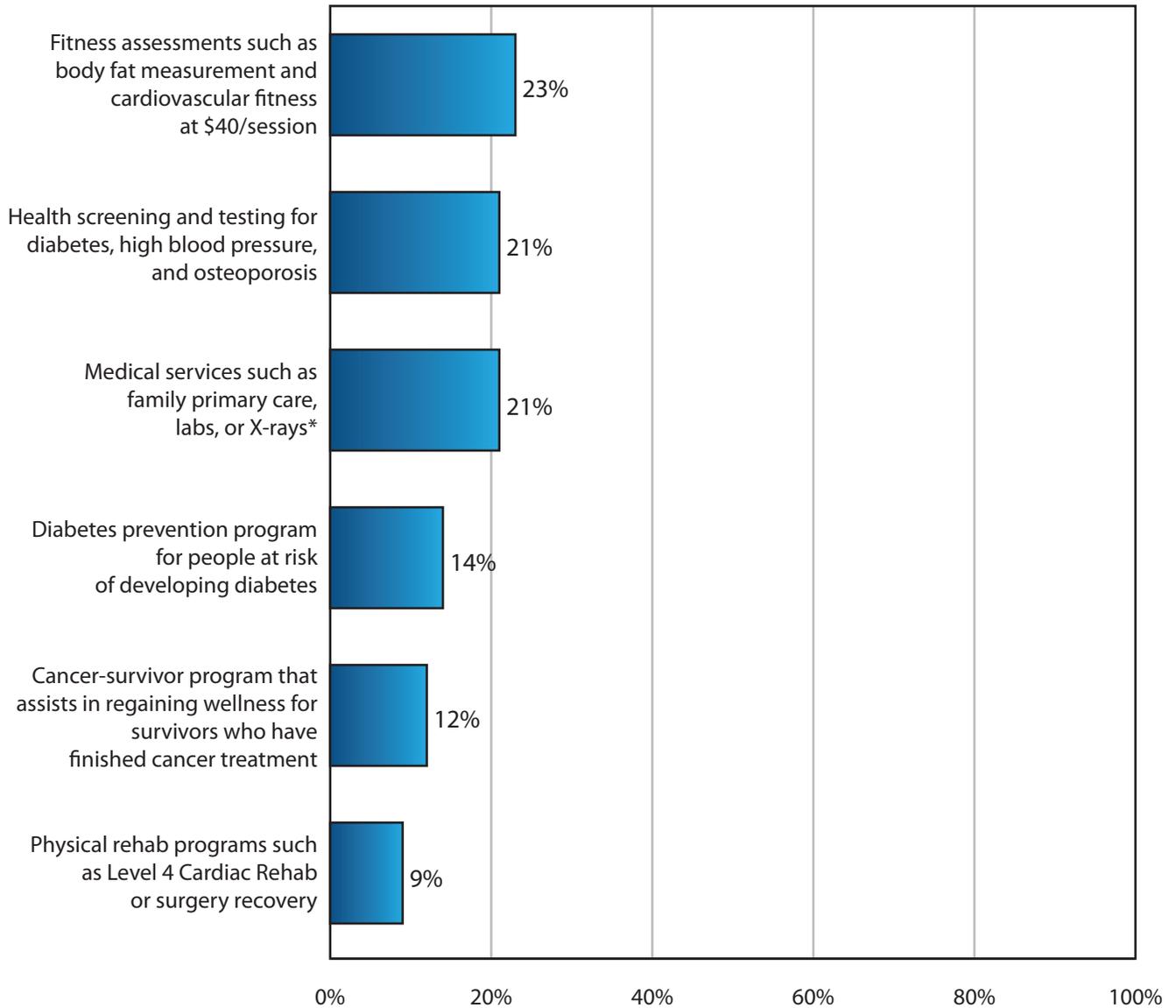


Figure 10.04 Interest in Amenities among Prospective Members

Interest in Health and Wellness Programs for Adults among Prospective Members

The following graph shows prospective members' interest in health and wellness programs for adults that could be offered in partnership with a local health-care provider.



*Family care was cited most often, with labs and x-rays also receiving interest.

Figure 10.05 Interest in Health and Wellness Programs for Adults among Prospective Members

Chapter Eleven

Interest in Sports and Recreation for Adults

Interest in Indoor Sports Leagues for Adults among Prospective Members

The following graph shows the level of interest in indoor sports leagues, usually costing \$35/person for a season, for adults among prospective members.

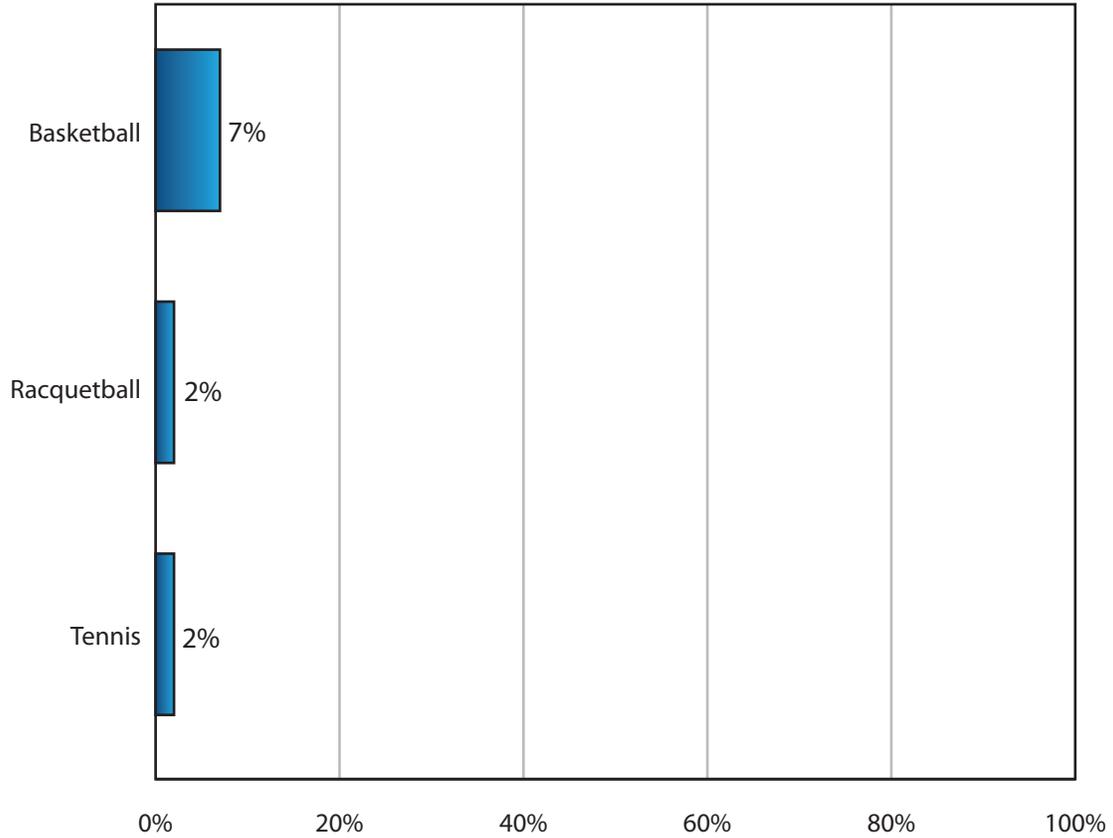


Figure 11.01 Interest in Indoor Sports Leagues for Adults among Prospective Members

Interest in Outdoor Sports Leagues for Adults among Prospective Members

The following graph shows the level of interest in outdoor sports leagues, usually costing \$35/person for a season, for adults among prospective members.

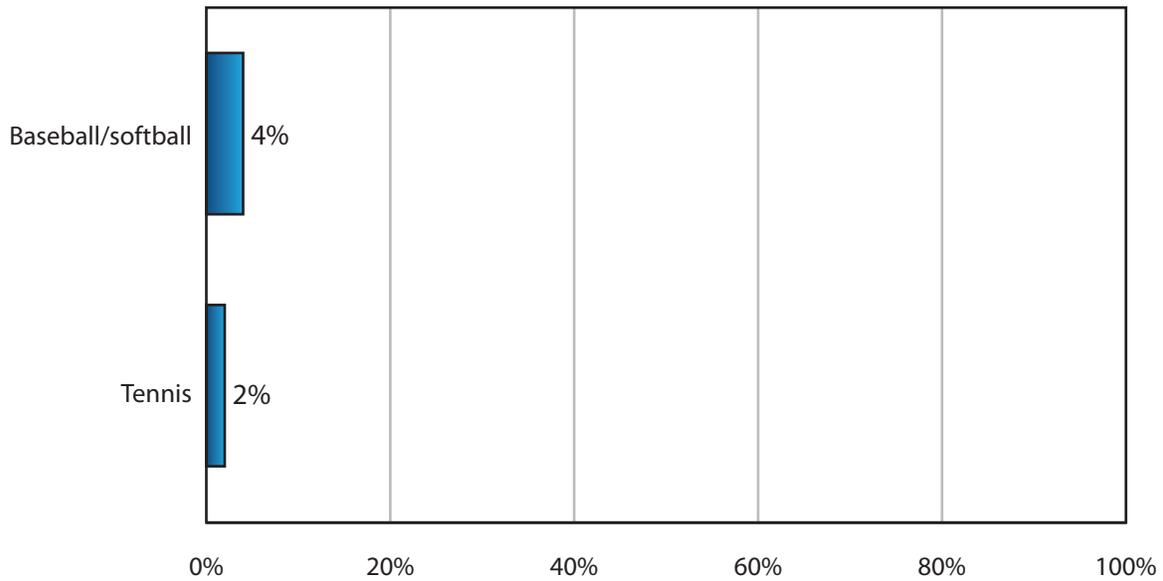


Figure 11.02 Interest in Outdoor Sports Leagues for Adults among Prospective Members

Interest in Social and Recreational Activities for Adults over Age 55

The following graph shows the level of interest in social and recreational activities specifically for adults over age 55 among prospective members.

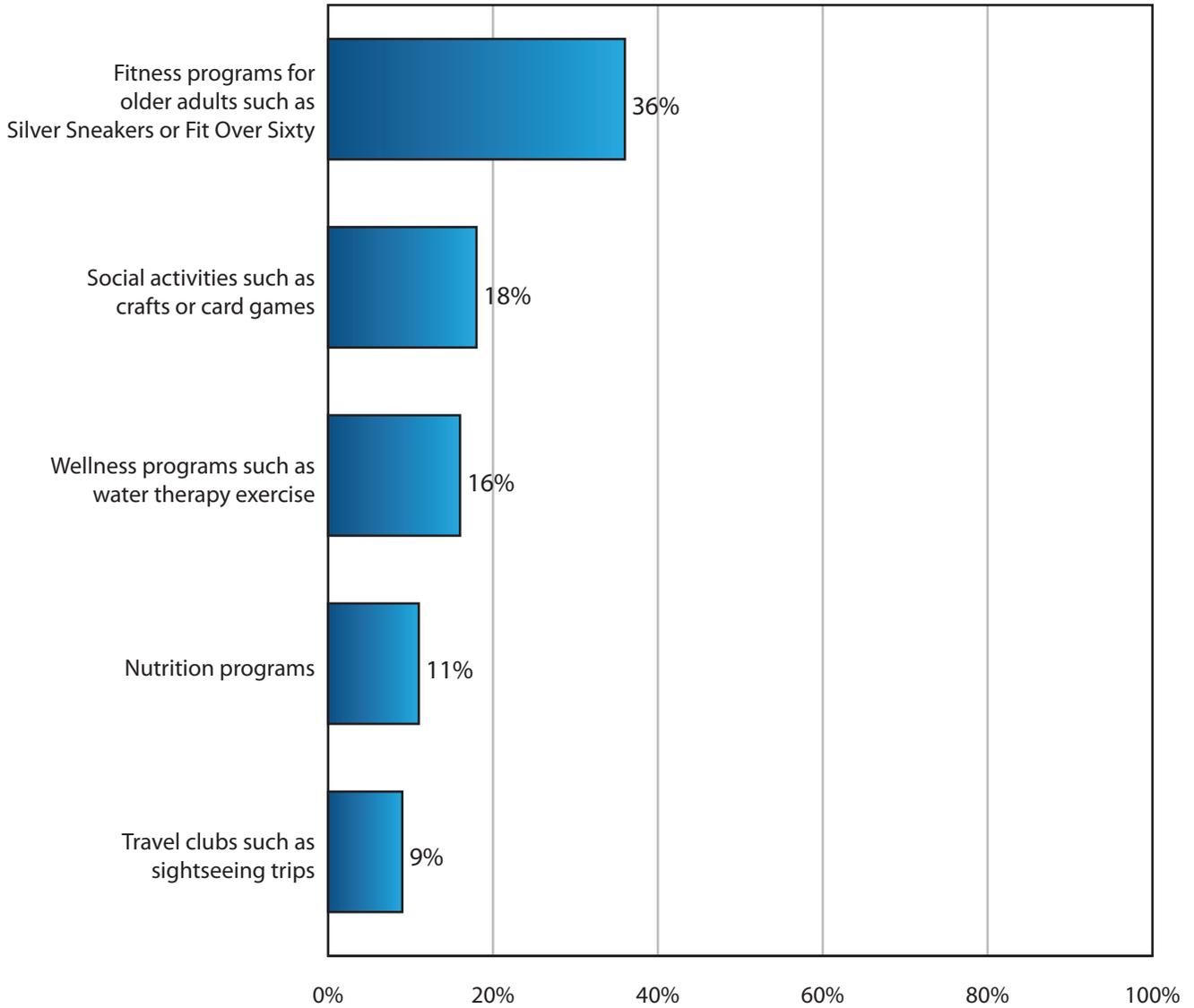


Figure 11.03 Interest in Social and Recreational Activities for Adults over Age 55

Chapter Twelve

Interest in Aquatics for Adults and Children

Interest in Aquatic Programs for Children and Teens among Prospective Members

The following table shows the level of interest in aquatic programs for children and teens among prospective members.

Activities in the pool	Infant-2	3-5	6-9	10-13	14-17
Parent and infant swim classes at about \$20 for a 6-week session	Low				
Recreational swimming		High	Very High	Very High	Low
Swim lessons at about \$20 for a 6-week session		Low	Very Low	Low	Low
Supervised sports such as water volleyball at about \$30 for a 6-week session			Low	Moderate	Very Low
Swim teams at \$180 for a season (3 months)			Low	Low	Very Low

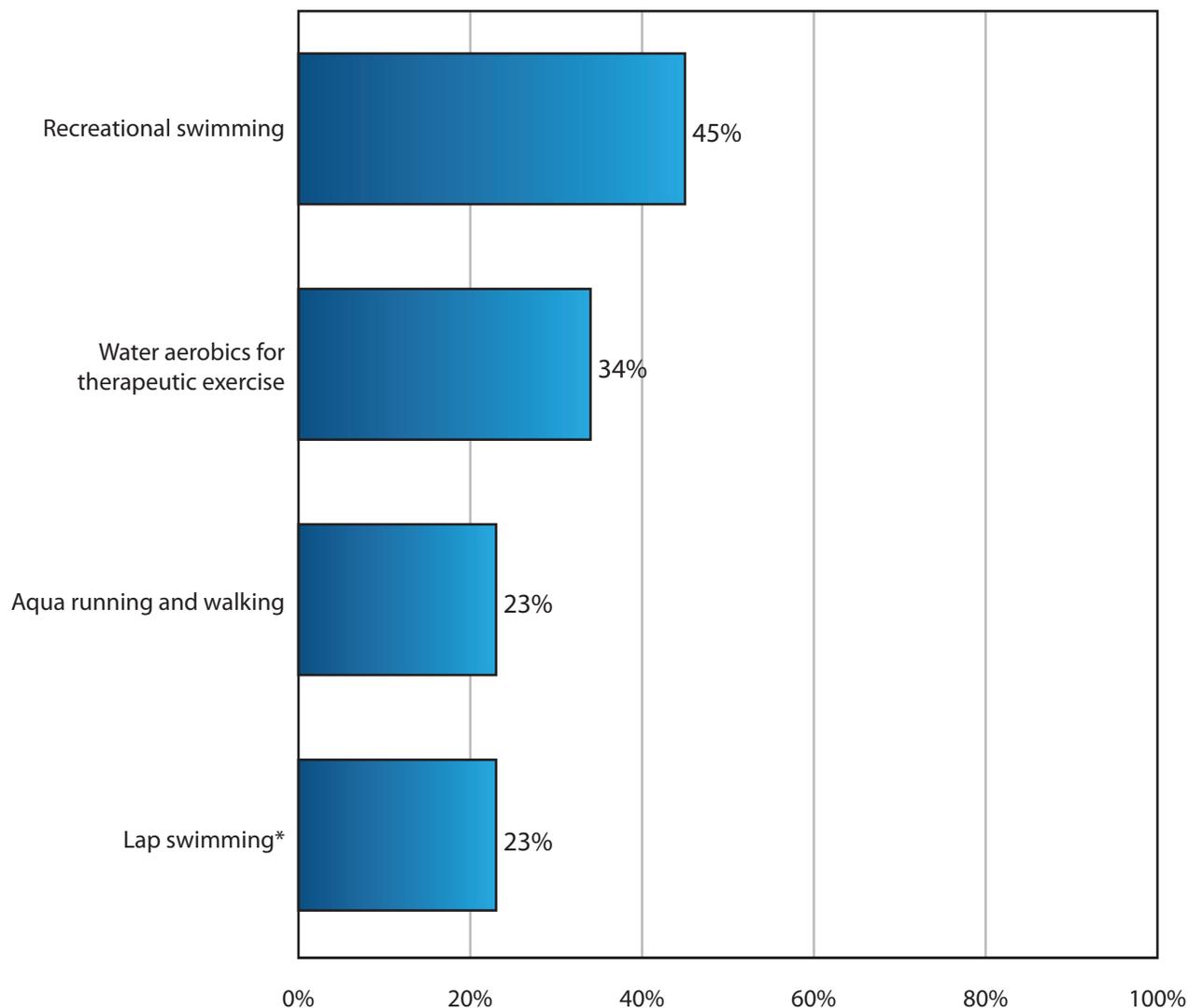
Very Low = <1% Low = 1%-4% Moderate = 5%-9% High = 10%-14% Very High = 15%+

Note: Lifeguard training at \$140 for an 8-week session was also tested but received insignificant interest.

Figure 12.01 Interest in Aquatic Programs for Children and Teens among Prospective Members

Interest in Swimming and Water Exercise for Adults among Prospective Members

The following graph shows interest in activities in a pool among adult prospective members.



*Of those interested in *lap swimming*, 100% are currently lap swimmers.

Note: *Swimming lessons at \$20 for a 6-week session* was also tested but received insignificant interest.

Figure 12.02 Interest in Swimming and Water Exercise for Adults among Prospective Members

Chapter Thirteen

Strategic Questions and Answers

Strategic Questions and Answers for a New Canal Fulton Family YMCA

The Consultant recommends that in order to meet the forecasts for new membership units, the leaders of the YMCA of Central Stark County and its partners should carefully consider the answers to all of the following questions:

1. Does interest exist for a new Canal Fulton Family YMCA?
2. Of the three proposed sites, which one works the best?
3. Does the study reveal the characteristics of a community that are critical to the success of a new Canal Fulton Family YMCA?
4. Are there factors that could increase or decrease the forecasts of new membership units?
5. Does the current YMCA pricing structure work for a new Canal Fulton Family YMCA?
6. Who are prospective members of a new Canal Fulton Family YMCA?
7. Are there recommendations on the facility development of a new Canal Fulton Family YMCA?

1. Does interest exist for a new Canal Fulton Family YMCA?

Yes.

The findings revealed significant interest for a new Canal Fulton Family YMCA. As illustrated in Figure 5.05, pages 33, of all households that currently do not belong to a YMCA in the area targeted for the study, a total of 6.8% of all households, or 1,097 households, had *a great deal of interest* in joining a new Canal Fulton Family YMCA with all location, facility, and pricing options. *A great deal of interest* is the highest level on the interest intensity scale of 0 to 4, where 0 means *zero interest* and 4 means *a great deal of interest*.

Moreover, another 1.9% had *a lot of interest* in joining a new YMCA, translating into another 307 household units. Please note that the Consultant typically bases forecasts only on those with *a great deal of interest*. Historically, the number of households with *a lot of interest* in joining is an indicator of how fast a YMCA can reach the forecast within 12-18 months of its opening, how likely a YMCA is to maintain that membership level after the first 12-18 months, and how likely it is that a YMCA could exceed the forecast. Based on the Consultant's experience, the ideal ratio between the two levels is 1:1. In a community that does not have an existing YMCA facility, the ratio tends to skew towards the second level, in other words, towards more people with *a lot of interest* rather than those with *a great deal of interest*.

The YMCA's national average for household penetration is about 4.5%. Based on records provided by the YMCA, there are currently 1,775 YMCA member households in the survey area from the David YMCA in Jackson Township. In other words, 9.8% of all households already belong to the YMCA. The total potential new household penetration for a new Canal Fulton Family YMCA is still higher than the national average. These results indicate that interest and support exists for expanded YMCA programs and services in the area. The findings also revealed that about 17% of all current YMCA member households in the area, including those of the David YMCA and other YMCAs in the area, expressed *a great deal of interest* in using the new YMCA, resulting in an estimated 363 units.

Please note that these numbers forecasted represent memberships sold, not retained, during the first 12-18 months after the new facility is built and the recommendations in the report are followed. It includes all facility and pricing options tested in the study, but does not exclude prospective members who may terminate their memberships. It therefore should not be interpreted to mean that a YMCA will definitely have and maintain a certain number of members.

2. Of the three proposed sites, which one works the best?

The Canal Fulton location

As shown in Figure 5.06, page 34, among all area households with a general interest in a YMCA, the vast majority (95%) chose the Canal Fulton location as either their 1st or 2nd choice, a percentage much higher than those of the other two locations.

While the perceived geographic convenience of a location is an important consideration in making the right decision about where to build, it is just one of the considerations. The leaders of the YMCA and its partners should also consider the following questions:

- How much land is available at each site?
- How much does the land at each site cost? How well does the cost of land fit the YMCA's fund-raising capacities?
- How do potential donors respond to each site? Do they favor one site or the other?
- What is the curb appeal at each site? Does each site offer sufficient traffic and ease of entry and exit?
- What is the possibility of a partnership at each site? (Partnerships could include collaborative relationships with schools, parks and recreation departments, hospitals, churches, and other community organizations.)
- What is the impact of each site on neighborhood development? Would a YMCA increase the appeal of the neighborhood?
- How would the population in the immediate service area of each site grow in the next five years?

Please note that since the respondents were asked to name each location as their first choice as well as whether they would seriously consider it as their second choice, the percentage of preference for each location is not mutually exclusive. In other words, these statistics are valid if only one location is picked.

In order to achieve its maximum potential the YMCA also must ensure that the new site includes:

- sufficient space for developing both the indoor and outdoor areas that are ideal for typical YMCA programming and parking and that allow possibilities for further expansion
- maximum curb appeal
- ease of entry and exit
- the facilities required to house the programs and activities in highest demand

3. Does the study reveal characteristics of the community that are critical to the success of a new Canal Fulton Family YMCA?

Yes

The study revealed the following characteristics of households in the survey area that are important for the success of a new Canal Fulton Family YMCA:

- Not only is the general population **very physically inactive**, the majority is also ill-equipped with knowledge of healthy living. Just over four out of ten (43% of) households indicated they currently engage in any type of physical activity. This is far below the national average of 50%. Moreover, only 43% chose the statement *I am good at everyday choices to be healthy and live well*, the rest are either struggling to do so or don't know. Motivating and serving a population ill-equipped with knowledge of healthy living requires more dedicated efforts.

- **A good number of for-profit providers exist in a community that needs many more services.** Less than a quarter (24%) of households said they already belong to or participate in some type of nonprofit or for-profit fitness, recreation, sports club, or facility, a level much lower than the national average of 25%, indicating a lack of providers. However, a total of four names of for-profit providers were mentioned, serving a combined 8% of all households, which is right at the national average. These findings suggest that the service void in the community is from the public/nonprofit sector. Given the presence of a good number of for-profit providers, a new Canal Fulton Family YMCA needs to provide a state-of-the-art facility with top-notch quality programs and services, specifically targeting its primary prospective member groups (which will be discussed later in the section).
- **The population growth in the area is limited.** The projected growth in the area for the next five years is -1%, much lower than the national average of 5%. This means that the new YMCA would not have the luxury of new households moving into the area to replace the units it lost. This requires the YMCA to concentrate on retention strategies from day one.
- **The YMCA, as an entity, is very well known among the community.** More than half (50%) of all area households knew of a YMCA, a level higher than the national average of 33% for communities with YMCA facilities and of 25% for communities without full-service YMCA facilities. The David YMCA of Jackson Township, which is a branch of the YMCA of Central Stark County, was mentioned by nearly half (49%) of those who knew of a YMCA. This suggests a long history of the YMCA in the community and that the community has a connection with existing YMCA branches in the area. This should be leveraged and built upon to generate the support for and promotion of the new full facility.

4. Are there factors that could increase or decrease the forecasts of new membership units?

Yes

The table on the next page provides insight on additional factors that could increase or decrease the forecasts of new membership units for a new Canal Fulton Family YMCA.

Forecast could increase if ...
<ul style="list-style-type: none"> • a new Canal Fulton Family YMCA is able to attract a significant portion of those households with <i>a lot of interest</i> in joining with aggressive marketing and promotion of its scholarships and sliding-scale membership rates. • no other major provider of similar services enters the marketplace and the new YMCA is able to be the area’s leading provider for fitness, wellness, aquatics, and recreation. • partnerships are sought with other organizations that can broaden the program offerings and services such as city parks and recreation departments for outdoor sports and schools for before- and after-school programs and teen programs. • the YMCA of Central Stark County, by utilizing its existing David YMCA and North Canton YMCA in the area as well regional partnership with YMCAs in Akron and Massillon, is able to position and promote the new Canal Fulton YMCA membership with a variety of new programs and access to multiple locations with complementary facility features.
Forecast could decrease if ...
<ul style="list-style-type: none"> • there are similar service providers that capture the family with children, aging baby-boomers, and Health-seeker prospective members before the new YMCA does. • programming and marketing efforts are generic and fail to capture the demographic and psychographic characteristics of prospective members. • the most popular programs and activities indicated by this report are not included.

Figure 13.01 Factors that Could Increase or Decrease Forecasts of New Membership Units

5. Does the current YMCA pricing structure work for a new Canal Fulton Family YMCA?

No—new, lower branch-only rates are also needed

Two membership rate levels were tested and the findings revealed that both the current YMCA rates as regional rates and new, lower branch-only rates are needed in order to achieve a maximum number of new membership units and revenue.

Specifically, the findings revealed the following, as illustrated in Figure 5.08, page 36:

- among all prospective members, more than half (58%) indicated *a great deal of interest* in joining at the current YMCA rates – the higher rates tested
- the remaining 42% indicated *a great deal of interest* in the proposed Canal Fulton branch-only rates – the lower rates tested

These findings revealed great price sensitivity among prospective members. No one pricing suits all. If the lower rates are offered, a new Canal Fulton Family YMCA could attract over 1,000 new units. Therefore both the current YMCA rates and the new, lower branch-only rates are recommended.

6. Who are the prospective members of a new Canal Fulton Family YMCA?

Families with children, aging baby-boomers, and empty-nesters: many are Health-seekers and desire the “Third Place”

Consider the following demographics of prospective members of the new Canal Fulton Family YMCA:

- Nearly one-third of prospective members (30%) said they had children under age 18 in their homes. This is very significant when only 26% of the population in the general community are under age 19. This means that the new YMCA would disproportionately serve many more families with children. This finding dictates the necessity of providing services such as babysitting while parents work out, a kids’ play center for older kids, and family changing rooms, all of which would enable family members to use the facility with convenience and ease and were of high interest among prospective members (see Figure 7.01, page 55 and Figure 10.04, page 74).
- Nearly one-third (30%) of prospective members identified themselves as between the ages of 55 and 64, compared to only 16% among the general population. While 60% of prospective members chose *family* as their membership, only 30% indicated they have children under 18, leaving the remaining 30% as possibly being empty-nesters.
- The majority (57%) of prospective members said they tried to make everyday choices to be healthy and live well, but struggle to do so, which is typical of Health-seekers. As a result, 52% preferred to working out with a group of adults at their fitness levels, 57% expressed interest in having Y staff offer them advice on proper workout techniques, 52% in a free personal health and fitness plan based on their goals and monitored by Y staff, and 71% in a lounge area that serves healthy snacks and coffee. The strong interest in a lounge area signified the importance of social infrastructure at the new YMCA and a strong desire for the “Third Place” among prospective members. The “Third Place” refers to social surroundings separate from the two usual social environments of home and the workplace.

A new Canal Fulton Family YMCA should design its facility, programming mix, and marketing and promotional strategies with these demographics and psychographics in mind.

7. Are there recommendations on the facility development of a new Canal Fulton Family YMCA?

Yes

If the decision is made to proceed with establishing a new Canal Fulton Family YMCA at the Canal Fulton location, the Consultant recommends an indoor Phase I facility of approximately 19,500 square feet without aquatic features.

The Consultant applies two important criteria when recommending and prioritizing the features: member usage per square foot and revenue generated per square foot per capital dollar invested. However, FourSquare Research, Inc., is not an architectural or design firm. Our opinions are based on our experience with over 700 similar non-profit studies and on observing over 1,000 for-profit fitness providers. Actual square footage and costs will vary widely depending on zoning and environmental issues. All recommendations are meant to provide a “ball park” guide for facility development, expansion, and/or renovation.

The tables on the following pages first show the program usage of major features among prospective members. They then list the space allocation recommended for a new Canal Fulton Family YMCA at the Canal Fulton location.

Program Usage of Major Features

The following table shows the level of usage of facility features by program among prospective members.

Features of a New Canal Fulton Family YMCA								
Programs	Wellness/ Fitness Center	Group Exercise Studios	Multipurpose Classrooms	Indoor Multipurpose Gymnasium	Indoor Warm Water Family Pool	Indoor Walking and Running Track	Child Watch Babysitting	Youth/ Teen Center
Adult Fitness	Very High	Very High			High	Very High		
Adult Aquatics					Very High			
Adult Adventure								
Adult Sports				Low				
Adult Recreation			Moderate					
Nutrition and Weight Management			Moderate					
Stress and Relaxation		Very High						
Rehab/Health Programs			Moderate					
Women's Programs	Moderate							
Family Activities		Moderate			High			
Programs for Children Ages 0–2			Very Low		Low		Low	
Programs for Children Ages 3–5		Low	Moderate	Low	High		Moderate	
Programs for Children Ages 6–9		Low	Low	Moderate	Very High		Moderate	
Programs for Children Ages 10–13	Very High	Low	Low	High	Very High			Very High
Programs for Children Ages 14–17	Moderate	Low	Low	Low	Low			Moderate
Adult Rating Scale	Low	<15%		Children's Rating Scale		Low	<5%	
	Moderate	15%–29%				Moderate	5%–9%	
	High	30%–44%				High	10%–14%	
	Very High	≥45%				Very High	≥15%	

Figure 13.02 Summary of Usage among Prospective Members of a Canal Fulton Family YMCA

Recommended Space Allocation for a New Canal Fulton Family YMCA

Phase I Indoor Features Critical in Attracting New Membership Units for a New Canal Fulton Family YMCA	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes: <ul style="list-style-type: none"> • a cardiovascular area of 1,500 sq. ft. • a free-weights and strength-training equipment area of 1,000 sq. ft., including a 30-minute circuit-training area • a designated workout area of 500 sq. ft. with more staff supervision for teens, beginners, and women • consulting areas/rooms of 500 sq. ft 	3,500	Figure 8.01, Figure 10.01, & Figure 10.02
Two group exercise studios, one of 1,500 square feet for aerobics and group fitness classes, the other of 800 square feet for relaxation, dance, yoga, and tai chi, and specialty classes such as cycling and pilates	2,300	Figure 8.01, Figure 9.01 Figure 10.01, & Figure 10.02
Multipurpose class rooms for arts and craft programs, health education, and senior social programs	500	Figure 10.05, & Figure 11.03
An indoor multipurpose activity center with half courts, dividers, retractable hoops, versatile flooring, and ample storage space for a variety of activities such as basketball, volleyball, gymnastics, summer day camps, and family nights	5,000	Figure 7.02, Figure 7.03, Figure 8.01, & Figure 11.01
Child watch/babysitting area for infants and toddlers ages 0-5	800	Figure 7.01
Youth and teen center with TV, pool tables, Exergame, and seating for social activities (which can also be used for other programs when needed)	1,000	Figure 9.01
Members' lounge/snack bar/social area/community program area	1,000	Figure 10.03
Showers, lockers, and changing areas for men, women, and families	1,500	Figure 10.04
Subtotal	15,600	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	3,900	
Phase I Total Indoor	19,500	
Phase I Outdoor Features		
Outdoor trail for walking and running with fitness stations	N/A	Figure 10.01
Phase II Features		
An indoor warm-water family pool with zero degree/beach entry for recreational swimming, lessons, and water aerobics, as well as two lanes for lap swimming and aqua walking/running	7,000	Figure 12.01, & Figure 12.02
An indoor multipurpose gymnasium with a full court by adding to the Phase I activity center	5,000	Figure 7.02, Figure 7.03, Figure 8.01, & Figure 11.01
Subtotal	12,000	
Minimal planning factor, H/V/AC, bathrooms, halls, and offices (25%)	3,000	
Phase II Total Indoor	15,000	

Figure 13.02 Features Critical to the Success of a New Canal Fulton Family YMCA