TAB 2

A FourSquare Market Study

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Presented to the Manatee County Family YMCA and the City of Palmetto Community Redevelopment Agency

February 28, 2011

Submitted by



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Market Research and Strategic Planning for Non-profits Nationwide

February 28, 2011

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Dear Sean and Jeff:

I am pleased to submit the results of our market research study on the opportunities for outdoor recreational activities and a new YMCA in Palmetto, Florida.

This report provides forecasts for annual membership units for a new Palmetto YMCA at proposed locations and level of interest in a variety of outdoor recreational activities at various city parks. It also contains detailed information on demographics, psychographics, and program interest of prospective members of the new YMCA.

We have enjoyed working with you and other members of the city and YMCA. We pride ourselves on the level of service that we extend 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,

Li Li

Managing Partner

Attachment

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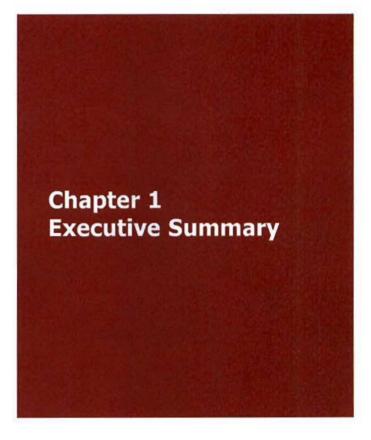
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Executive Summary

In order to assess opportunities for outdoor recreational activities and a new YMCA in Palmetto, FourSquare Research conducted both qualitative and quantitative research. This included in-depth telephone interviews with over 600 randomly-selected households that live 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:

- The study revealed strong to moderate interest exists for a variety of outdoor recreational
 activities at Palmetto city parks. Walking, running or biking on an outdoor trail system that
 connects all city parks is the most popular activity, followed by outdoor water sports,
 outdoor high ropes course and climbing towers, and outdoor sports for children.
- 2. The study also revealed huge interest exists for a new YMCA in Palmetto. A total of 9.8% of all households expressed a great deal of interest in joining a new YMCA regardless of location, with various pricing and facility options, a level more than double the national average of 4.5%.
- 3. Of two locations tested for a new YMCA, the location at 10th Street and 10th Avenue was preferred by 88% of prospective members, compared to only 69% for the other location at Blackstone Park. The study forecasts 1,786 new membership units as having a great deal of interest in joining the new YMCA during the first 12-18 months of the new YMCA with recommended pricing strategy and facility features at the location.
- 4. Findings discovered that the community characteristics include stagnant growth, a physically active population, a market place with many for-profit similar service providers, and high awareness of the name of the YMCA. These characteristics would create opportunities and challenges for the new YMCA.
- 5. Findings indicated great price-sensitivity among prospective members. Therefore, the Consultant recommends the new YMCA implement both the higher current county-wide YMCA rates and new lower branch-only rates.
- 6. The study revealed the **primary prospective member groups** of a new YMCA include families with children, aging baby-boomers, and Health-seekers, many yearning for handholding services and the "Third Place", a place for social gathering at the YMCA.
- 7. If the decision is made to proceed with the building of a new YMCA in Palmetto at the 10th Street and 10th Avenue location, the Consultant recommends a facility with approximately 15,000 square feet indoors with an outdoor, year-round family pool.

The tables on the following pages illustrate membership forecast logic model, summary of program usage, as well as the space allocation recommended for a new YMCA in Palmetto at the 10th Street and 10th Avenue location.

Membership Forecast Summary

The table below summarizes the findings of the market research study that forecasts the growth opportunities for a new YMCA.

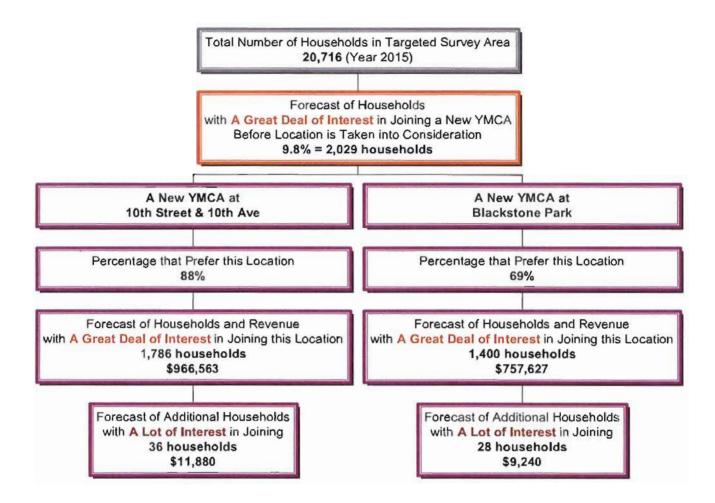


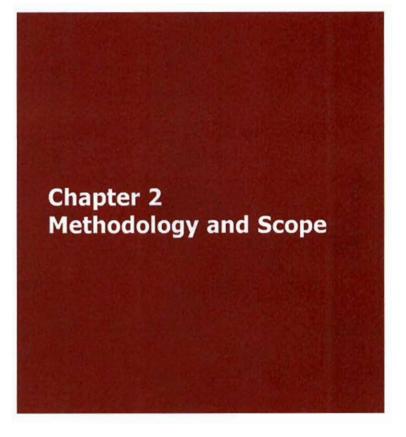
Figure 1.01 Summary of Forecasts for a New Palmetto YMCA

		Feat	Features of a New Palmetto YMCA	Palmetto YM	CA		
Programs	Fitness Center	Aerobics Studios	Outdoor Family Pool	Indoor Multi- purpose Gymnasium	Child Watch/ Babysitting	Kids Zone	Youth and Teen Center
Adult Fitness	Very High	Very High					
Adult Aquatics							
Adult Adventure							
Adult Sports				Low			
Adult Recreation							
Nutrition and Weight Management			Very High				
Stress and Relaxation		High					
Health Programs			High				
Women's Programs	Very High						
Family Activities							
Programs for Children Ages 0-2							
Programs for Children Ages 3-5		Low	Low	Low	Moderate		
Programs for Children Ages 6-9		Low	Low	Lcw	Moderate	Moderate	
Programs for Children Ages 10–13	Moderate	Low	Moderate	Low		Moderate	Moderate
Programs for Children Ages 14–17	Low	Low	Low	Low		(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	Low
Adult Rating Scale	Low	<15%	%	Children's Rating Scale	ng Scale	Low	<5%
	Moderate	15%-29%	29%			Mod	Moderate 5%-9%
	High	30%-44%	44%			High	10%-14%
	Very High		45%+		A transfer of the	Ven	Very High 15%+

Figure 1.02 Summary of Usage among Prospective Members

Indoor Features Critical in Attracting New Membership Units for a New Palmetto YMCA	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes a cardiovascular area of 1,800 sq. ft. a free weights and strength-training equipment area of 1,500 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 200 sq. ft	4,000	Figure 11.03, Figure 12.01 Figure 12.02, & Figure 12.06
Two group exercise studios, one 1,000 square feet for aerobics, group fitness classes and the another 1,000 square feet for relaxation, dance, yoga, and tai chi	2,000	Figure 12.01, & Figure 12.02
Multipurpose classrooms, with dividers and a sink/wet area for arts classes, health programs, nutrition seminars, and weight loss programs	600	Figure 12.04
Child watch/baby-sitting area for infants to toddlers	800	Figure 11.01
A Kids zone with moonwalks and a climbing maze for older children	1,000	Figure 11.01
Youth and teen center with TV, pool tables, Exergame, and seating for social (which can also be used for other programs when needed)	1,000	Figure 11.05
Showers, lockers, and changing areas for men, women, and families	1,500	
Members' lounge/snack bar/social area/community program area	1,500	Figure 12.05
Subtotal	11,800	
Minimal planning factor, HN/AC, bathrooms, halls, and offices (25%)	2,950	
Total Indoor	14,750	
Outdoor Features Critical in Attracting New Membership Units for a New Palmetto YMCA		
An outdoor year-round family pool with • zero degree/beach entry for recreational swimming, lessons, and water aerobics • aquatic playground features such as splash pads and sprays • two lanes for lap swimming, aqua walking and running	N/A	Figure 11.02, Figure 13.01, & Figure 13.02

Figure 1.03 Indoor Features Critical to the Success of a new YMCA



Methodology

This study used the following methodology:

- The qualitative research was conducted through discussion with staff members of the Manatee County YMCA, representatives of the City of Palmetto Community Redevelopment Agency, and community leaders who are interested in outdoor recreational activities and a new YMCA in Palmetto. 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 currently do not 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 ages 65 and older was controlled to be consistent with the percentage of seniors ages 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 January 24–30, 2011. The methodology used resulted in findings with a 95% confidence level and a statistical error of plus or minus 4.9%.

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

Scope

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

- How can a new YMCA best serve the residents of the City of Palmetto and its surrounding communities through its park facilities?
- What is the level of interest in a variety of outdoor recreational activities as well as new and traditional YMCA programs and services for children, teens, and adults of all ages?
- How many new member households would join a new YMCA located within the CRA during the first 12-18 months after the new YMCA 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?
- How would prospective members perceive the convenience of a CRA park for a new YMCA? How would perspective members perceive the convenience of Blackstone Park for a new YMCA?
- What type of outdoor recreational activities at the CRA park should be considered for residents of Palmetto?
- Which configuration of facility features for a new YMCA will attract the highest number of membership units? If the new YMCA is developed in phases, which configuration of facility features needs to be included to ensure success?
- What types of child care services should be offered for children? These could range from preschool, to before- and after-school programs, to summer camps with special themes.
- What types of programs should be offered for seniors? These could range from fitness programs specifically designed for older adults, to interest clubs such as books and cards, to travel groups.
- What types of new and traditional community programs should be considered for residents of Palmetto, ranging from arts and crafts classes, social programs for seniors, to continuing education programs for adults?
- What are the demographic and psychographic profiles of prospective members for a new YMCA?
- What is the niche of a new YMCA within Palmetto CRA? How can it complement nearby existing YMCA facilities?
- What membership pricing policy would work best to attract households? Other than current YMCA membership rates, should new pricing policies such as branch-only rates and/or income-based rate structure be considered?
- Other than the Palmetto CRA, what other opportunities for partnerships are present?

Chapter 3
Defining the Survey Area

Census Tract Map of the Survey Area

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

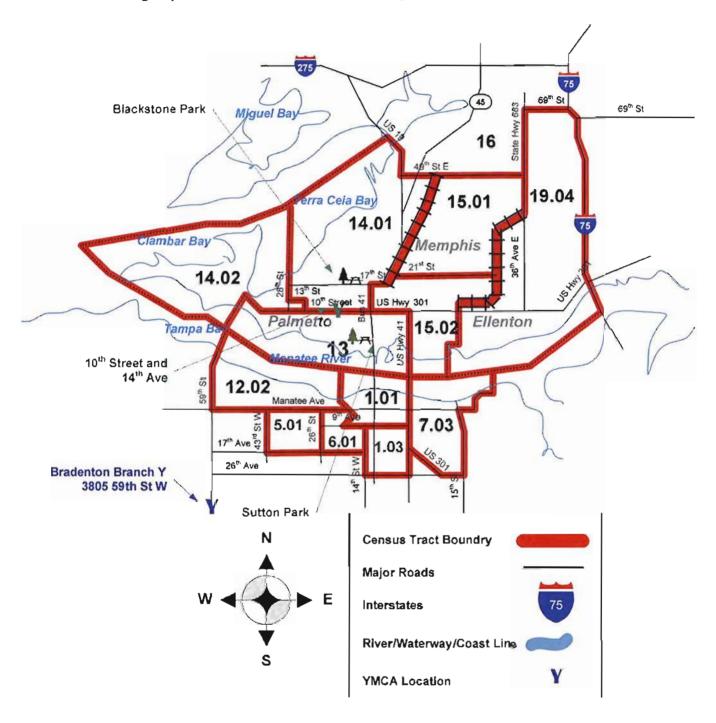


Figure 3.01 Census Tract Map of the Survey Area

Demographic and Population Trends Analysis of the Area Targeted for the Survey, 2000–2015

The tables on this and the following page detail the **population trends** in the targeted survey area for the years 2000–2015. This information is provided by the United States Census Bureau.

Summary of Demographics

- 1. Residential growth is at zero percent
- 2. Percentage of households with children right at the national average
- 3. Percentage of adults 65 or older above the national average
- 4. Median household income significantly below the national average
- 5. Percentage of households with total annual household income less than \$35,000 and less than \$50,000 well above the national average
- 6. Percentage of both households owned by occupants and rentals are below the national average while the percentage of vacant houses is above the the national average

	2000 Census	2010 Estimates	2015 Projections	2010 Nat'l. Average
Total Population	52,801	54,708	55,274	4%
Total Households	20,134	20,689	① 20,716	3%
		0% increas	se from 2010-2015	
Total Population By Race				
White	75%	71%	70%	74%
African American	17%	19%	20%	12%
American Indian	0%	0%	0%	1%
Asian	0%	1%	1%	5%
Other/Multi-Races	8%	8%	9%	8%
Hispanic Origin	17%	29%	34%	16%
Total Population By Gender				
Male	50%	50%	50%	49%
Female	50%	50%	50%	51%
Household				
Average Household Size	2.50	2.50	2.52	2.61
Percentage of Family Household	72%	63%	62%	67%

Continued on next page

NOTE: These figures are double-checked using DemographicsNow.com.

^{*} Hispanic origin can be any race.

Demographic and Population Trends Analysis (continued)

	2000 Census	2010 Estimates		2015 jections	2010 Nat'l, Average
Total Population by Age					
0-5 years	7%	7%	2	6%	
5–9 years	7%	Under 7%	070	7%	070/
10~14 years	7%	Age 20 6%	27%	7%	> 27% > 27%
15–19 years	4%	7%	5	7%	
20-24 years	8%	7%	5	7%	
25-34 years	12%	12%	5	12%	
35-44 years	14%	11%		11%	
45-54 years	12%	12%	5	12%	
55-64 years	9%	10%	5	10%	
65–74 years	10%	Age 65 9%	3	9%、	•
75–84 years	7%	and 7%	21%	7%	21% > 13%
85 + years	3%	Over 5%	,	5%	
General Income Data					
Median Household Income	\$43,785	\$41,828	(4)	\$44,895	\$53,679
Average Household Income	\$51,186	\$57,115		\$62,162	\$69,330
Household Income Distribution					
\$0 - \$14,999	20%	/ 15%	S S	14%	
\$15,000 – \$24,999	20%	60% 15%	42%	14%	39% >32%
\$25,000 - \$34,999	17%	12%	,/	11%	/
\$35,000 - \$49,999	21%	18%		18%	15%
\$50,000 \$74,999	14%	19%		20%	19%
\$75,000 - \$99,999	3%	13%		15%	13%
\$100,000 - \$149,999	2%	5%		6%	13%
\$150,000 and over	2%	3%		3%	9%
Household Disposable Income					
Median Disposable Income	\$33,887	\$36,174		\$38,266	\$48,263
Average Disposable Income	\$39,190	\$49,893		\$53,980	
Household Ownership					
Owned	57%	52%	6	52%	58%
Rented	24%	25%		26%	29%

Copyright Market Statistics, Inc. 2010

Figure 3.02 Population Trends Analysis of the Targeted Survey Area

Household Growth Trends by Census Tract, 2010–2015

The following table gives the household growth trends and median household income by census tract in the area targeted for the survey for the years 2010–2015.

Census Tract	2010 Estimate	2015 Projection	% of change 10-15	2010 Median Income
0001.01	1,178	1,140	-3%	\$32,124
0001.03	1,461	1,449	-1%	\$26,936
0005.01	1,161	1,125	-3%	\$51,131
0006.01	1,148	1,109	-3%	\$38,604
0007.03	874	843	-4%	\$33,543
0012.02	1,723	1,677	-3%	\$68,210
0013.00	1,474	1,433	-3%	\$48,202
0014.01	2,779	2,781	0%	\$46,667
0014.02	696	688	-1%	\$47,881
0015.01	1,003	983	-2%	\$40,407
0015.02	2,295	2,502	9%	\$24,381
0016.00	2,991	3,054	2%	\$44,337
0019.04	1,906	1,932	1%	\$41,828
otals and averages	20,689	20,716	0%	\$41,828

Figure 3.03 Household Growth Trends by Census Tract

Chapter 4
Findings among
Area Residents

Awareness of the YMCA among Area Residents

The chart on the left shows the level of awareness of the YMCA among area residents. The chart on the right shows which ones they were aware of.

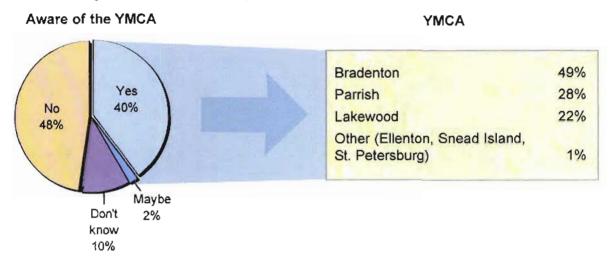


Figure 4.01 Awareness of the YMCA among Area Residents

Image of the YMCA among Area Residents

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

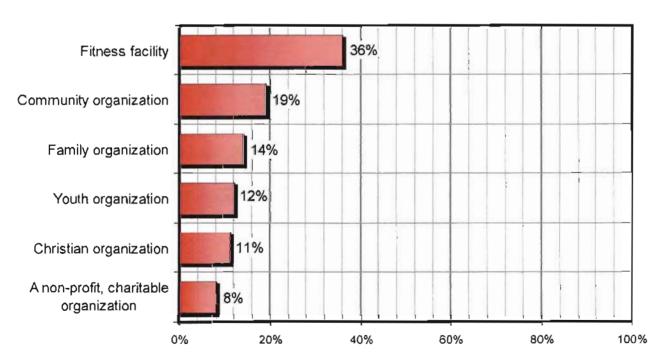


Figure 4.02 Image of the YMCA among Area Residents

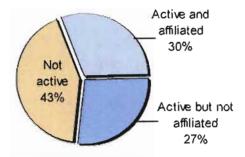
Area Residents' Activities and Affiliations

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	39%
Swimming	17%
Various exercise	16%
Workout equip/weights	12%
Aerobics	5%
Tennis	4%
Basketball	4%
Fishing/hunting	4%
Golf	4%
Soccer	4%
Working in yard/gardening	4%
Boating	3%
Baseball/softball	3%
Cycling	3%
Football	3%
Yoga/stretching/toning	3%
Martial arts	2%
Physical work on the job	2%
Water sports	2%



Top Health, Fitness and Recreation Options* (percentage of respondents/multiple responses)

For profit providers	14%
Bodywerks	
Electra Health Club	
Golds Gym	
Curves	
Fit & Firms	
Muscle Works	
Snap Fitness	
Other Nonprofit Providers	8%
Area Country Club	
Area parks and recreation	
Sports/little league	
Work/home <mark>/school</mark>	8%
At work or school	
Own equipment/work out at home	
Apartment/complex	

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 Compared to Prospective Members

The following chart shows how prospective members' responses compared to the responses of all area residents to the three statements given, indicating the presence of Health-seekers.

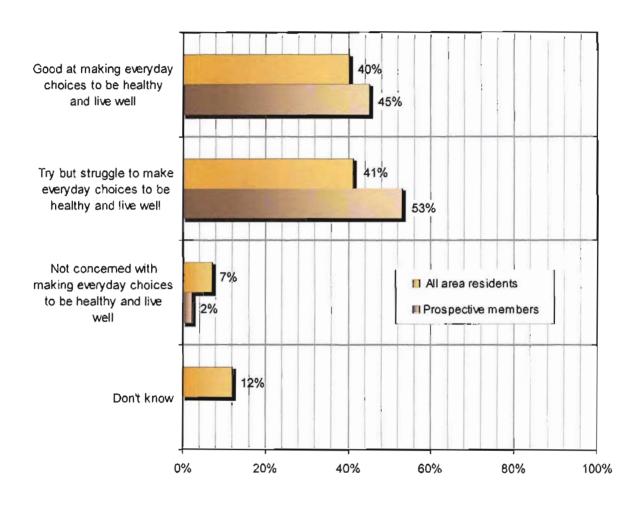


Figure 4.04 How Prospective Members and All Area Residents Evaluated their Health and Wellness Choices

SECTION 1:

Interest in Outdoor Recreational Activities for Adults and Children at Various Parks

Chapter 5
Interest in Outdoor
Water Activities

Level of Interest in Outdoor Water Activities for Children

The chart to the right shows the percentage of prospective members with children under age 18 in their households who said they were interested in outdoor water activities such as canoeing, kayaking, fishing, and crewing in the Manatee River.

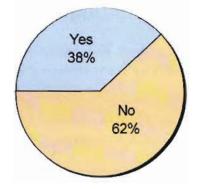


Figure 5.01 Level of Interest in Outdoor Water Activities for Children

Preferred Location for Outdoor Water Activities for Children

Those prospective members who said they were interested in outdoor water activities for children were asked which location they would prefer for those activities. The choices were Riverside Park at the Green Bridge in Palmetto or Estuary Park in Palmetto west of the Main Bridge across from the 7-Eleven and Civic Center. The following chart on the left shows that 100% preferred Riverside Park. The chart on the right shows what percentage then said they would consider the Estuary Park location.

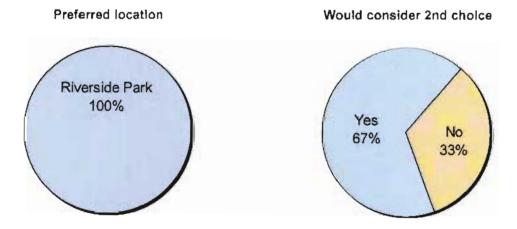


Figure 5.02 Preferred Location for Outdoor Water Activities

Interest in Aquatic Features for Children

The following chart shows the level of interest in outdoor aquatic features among prospective members with children in their household.

Aquatic features*	10–13	14–17
Lessons in canoeing, kayaking, fishing, and crewing at about \$20/class	Low	Low

^{*}Boat rental and equipment storage were also tested and received insignificant interest.

Figure 5.03 Interest in Outdoor Water Activities for Children

Level of Interest in Outdoor Water Activities for Adults

The chart to the right shows the percentage of prospective members who said they were interested in outdoor water activities for adults such as Canoeing, kayaking, fishing, and crewing in the Manatee River.

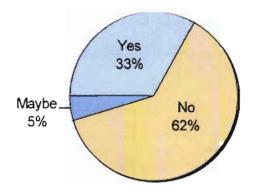


Figure 5.04 Level of Interest in Outdoor Water Activities for Adults

Preferred Location for Outdoor Water Activities for Adults

Those prospective members who said they were interested in outdoor water activities for adults were asked which location they would prefer for those activities. The choices were Riverside Park at the Green Bridge in Palmetto or Estuary Park in Palmetto west of the Main Bridge across from the 7-Eleven and Civic Center. The following chart on the left shows their preferences. The chart on the right shows what percentage then said they would seriously consider the other location.

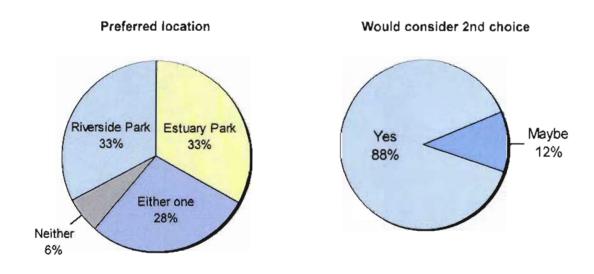


Figure 5.05 Preferred Location for Outdoor Water Activities for Adults

Level of Interest in Aquatic Features for Adults

The following chart shows the level of interest in aquatic features and offerings for adults among prospective members.

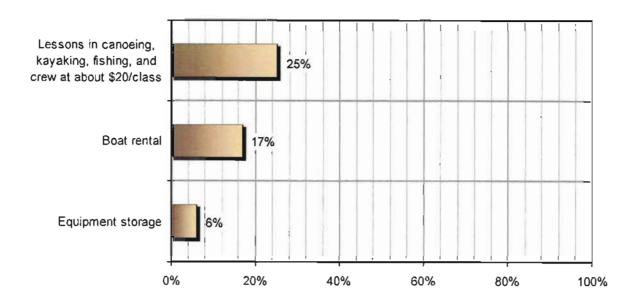


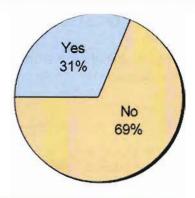
Figure 5.06 Level of Interest in Aquatic Features for Adults

Chapter 6
Interest in Outdoor Sports

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Interest in Outdoor Sports Leagues for Children and Teenagers

The chart to the right shows the percentage of prospective members with children under age 18 in their households who said they were interested in **outdoor sports leagues** such as baseball, soccer, tennis, or golf. The table below shows which ones they preferred.



Outdoor sports leagues	3–5	6–9	10–13	14-17
Soccer	Low	Very Low	Very Low	Very Low
Baseball	Low	Very Low	Very Low	Very Low
Lacrosse	Very Low	Moderate	Very Low	Very Low
Softball	Very Low	Low	Very Low	Very Low
T-ball	Very Low	Low	Very Low	Very Low
Golf	Very Low	Low	Very Low	Very Low

Very Low = <1%

Low = 1%-4%

Moderate = 5%-9%

High = 10%-14%

Very High = 15%+

Figure 6.01 Interest in Outdoor Sports Leagues for Children and Teenagers among Prospective Members

Interest in Sports Performance Training for Children and Teenagers

The chart to the right shows the percentage of prospective members with children under age 18 in their households who said they were interested in sports performance training at \$10/session for their child.

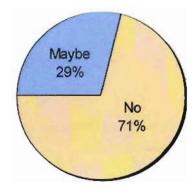
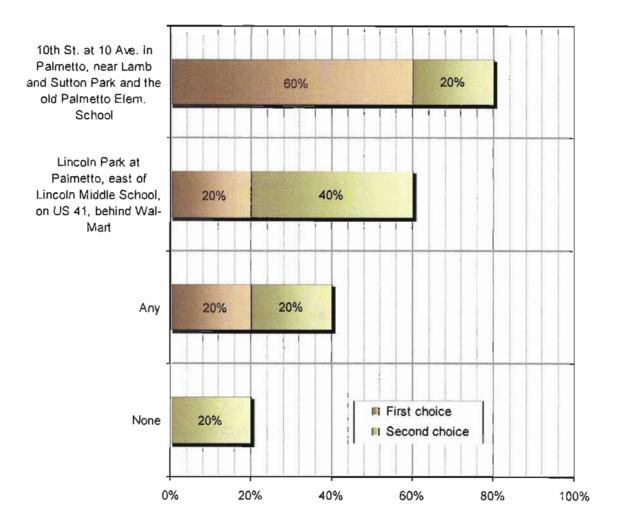


Figure 6.02 Interest in Sports Performance Training for Children and Teenagers among Prospective Members

^{*}All other sports leagues received insignificant interest.

Preferred Location for Outdoor Sports Leagues for Children

Those prospective members who said they were interested in outdoor sports leagues for children were asked which location they would prefer for those activities. They were asked to give their first and second choices.

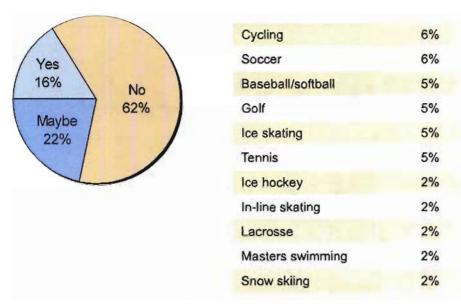


^{*}Blackstone Park north of Palmetto High School was also tested and received insignificant interest.

Figure 6.03 Preferred Location for Outdoor Sports Leagues for Children and Teens

Interest in Outdoor Sports Leagues for Adults

The pie chart on the left shows the percentage of prospective members who said they were interested in outdoor sports leagues for adults at \$35/person for a season. The table to the right shows which ones they preferred.



^{*}All other sports leagues received insignificant interest.

Figure 6.04 Interest in Outdoor Sports Leagues for Adults

Preferred Location for Outdoor Sports Leagues for Adults

Those prospective members who said they were interested in outdoor sports leagues for adults were asked which location they would prefer for those activities. They were asked to give their first and second choices.

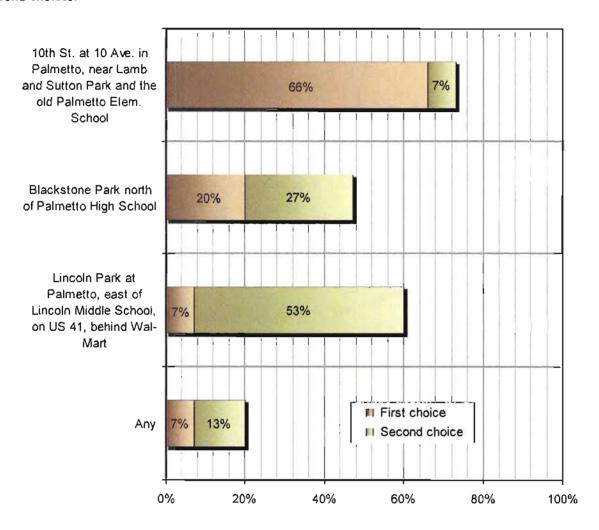


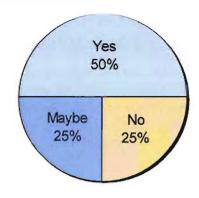
Figure 6.05 Preferred Location for Outdoor Sports Leagues for Adults

Chapter 7
Interest in Outdoor
Adventure Activities

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Interest in Outdoor Adventure Activities for Children and Teenagers

The chart to the right shows the percentage of prospective members with children under age 18 in their households who said they were interested in outdoor adventure activities such as zip line, climbing tower, and skating rink. The table below shows which ones they preferred.



Outdoor adventure activities	10–13	14–17
Outdoor zip line	Moderate	Low
Outdoor high ropes courses and climbing towers	Moderate	Low
A BMX bike track	Moderate	Very Low
Outdoor in-line skating and skateboarding on a supervised rink	Low	Low

Figure 7.01 Interest in Outdoor Adventure Activities for Children and Teenagers

Perceived Convenience of the Proposed Location for Adventure Activities for Children

The chart to the right shows the percentage of prospective members who thought the location at Estuary Park in Palmetto, west of the Main Bridge across from the 7-Eleven and Civic Center for outdoor adventure activities for children was very convenient, somewhat convenient, or not at all convenient.

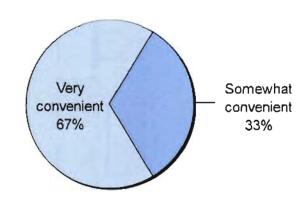
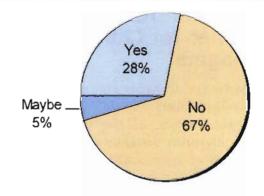


Figure 7.02 Perceived Convenience of the Proposed Location for Outdoor Adventure Activities for Children

Interest in Outdoor Adventure Activities for Adults

The chart to the right shows the percentage of prospective members who said they were interested in outdoor adventure activities for adults such as zip line, climbing tower, and skating rink. The graph below shows which ones they preferred.



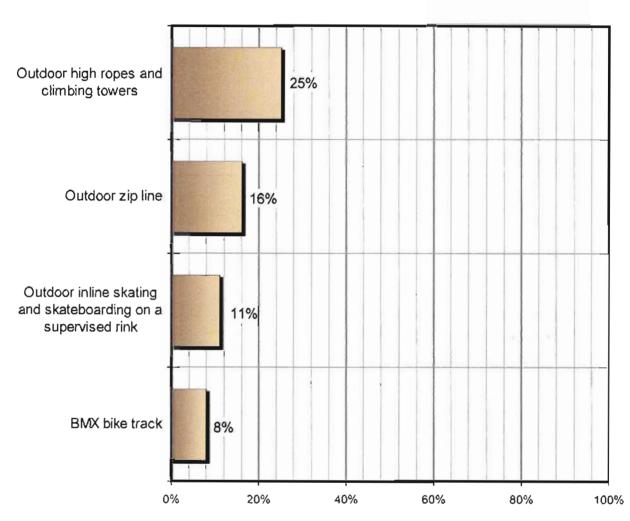


Figure 7.03 Interest in Outdoor Adventure Activities for Adults

Perceived Convenience of the Proposed Location for Adventure Activities for Adults

The chart to the right shows the percentage of prospective members who thought the location at Estuary Park in Palmetto, west of the Main Bridge across from the 7-Eleven and Civic Center for outdoor adventure activities for adults was very convenient, somewhat convenient, or not at all convenient.

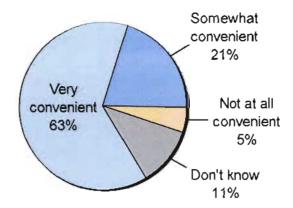
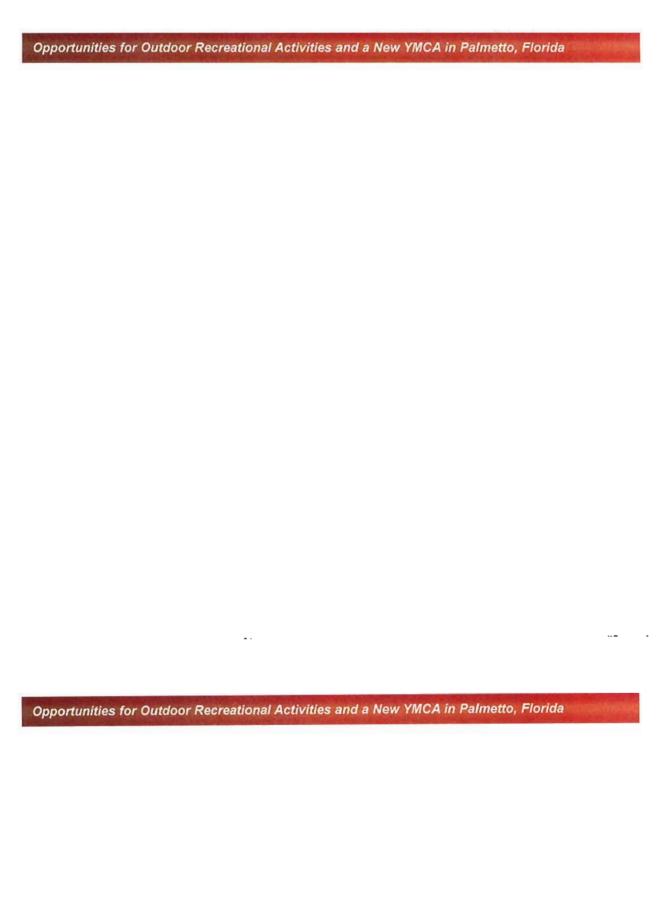
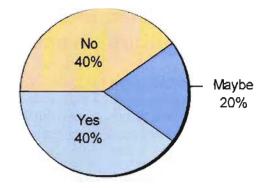


Figure 7.04 Perceived Convenience of the Proposed Location for Outdoor Adventure Activities for Adults



Interest in a Golf Course

The chart to the right shows the percentage of prospective members who said they were interested a golf course with practice range and 18-hole executive course located at Terra Ceia adjacent to Blackstone Park north of Palmetto High School. The graph below shows which programs at the golf course they are interested in.



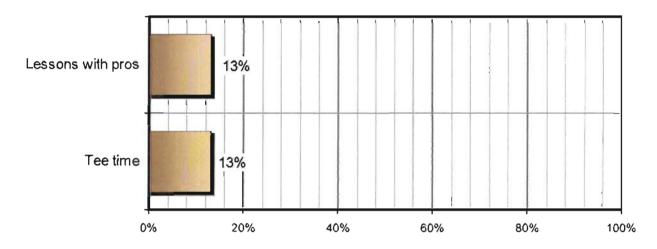


Figure 8.01 Interest in a Golf Course

Level of Interest in the YMCA Fresh Garden Project

The chart to the right shows the percentage of prospective members who said they were interested in the YMCA Fresh Garden Project that plants and harvests organic vegetable gardens.

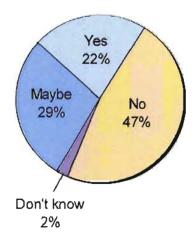


Figure 8.02 Level of Interest in the YMCA Fresh Garden Project

Level of Interest in Outdoor Arts and Cultural Events

The chart to the right shows the percentage of prospective members who said they were interested in outdoor arts and cultural events such as movies in the park and outdoor concerts and theater performances.

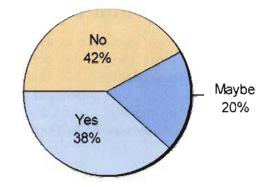


Figure 8.03 Level of Interest in Outdoor Arts and Cultural Events

Preferred Location for Outdoor Arts and Cultural Activities

Those prospective members who said they were interested in outdoor arts and cultural activities were asked which location they would prefer for those activities. The choices were Riverside Park at the Green Bridge in Palmetto or Lamb and Sutton Parks at 11th Ave. and 6th St. near the old Palmetto Elementary School. The chart to the right shows their preferences.

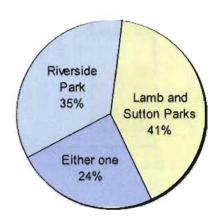
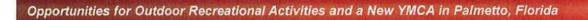


Figure 8.04 Preferred Location for Outdoor Arts and Cultural Activities

SECTION 2: Interest in a New Palmetto YMCA



Chapter 9 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 demand for outdoor recreational activities and a new YMCA in Palmetto, Florida, FourSquare Research conducted telephone interviews with 643 households in the targeted survey area. Among all households randomly selected, 600 households were taken through the in-depth interview. Forty-three (43) households refused to participate in the in-depth interview for various reasons.

Interview participants were asked a variety of questions to determine their level of interest and their preferences regarding pricing, facility features, and location. Based on their answers, the Consultant was able to forecast membership and revenue levels.

Location

The survey of area residents was designed to test the levels of interest in:

- a new YMCA at 10th Street and 10th Avenue in Palmetto near Lamb and Sutton Park and the old Palmetto Elementary School
- · a new YMCA at Blackstone Park north of Palmetto High School

Facility Features

The following table details the planned facilities, programs, and services included as part of membership at a new YMCA in Palmetto.

Features includes:

- · an outdoor pool for recreational swimming, lessons, and water aerobics
- a new first-class fitness area with cardiovascular and muscle-strengthening equipment
- · studios for group exercise classes such as aerobics, yoga, and dance
- a free 12-week personalized fitness and health plan
- · free swim lessons and sports leagues for children
- · programs specifically for youth, teens, and seniors
- · free babysitting while parents work out

Other Facility Features Tested to Determine Additional Interest in Joining (Respondents were asked to rate the features as first choice and second choice)

- an indoor warm-water therapy pool for water aerobics and therapy
- · an indoor multipurpose gymnasium for basketball, volleyball, and other indoor sports

Figure 9.01 Facility Features

Pricing Options

Respondents were quoted monthly membership rates and joining fees based on their preference for a particular membership category defined below.

The rates in

- blue represent the current countywide rates that would allow access to all the YMCA facilities in Manatee County
- pink represent the current branch-only rates that are one-third lower than the current countywide rates that allow access to only the new YMCA
- brown represent the proposed sliding scale rates that were quoted only to households with a total household annual income of less than \$35,000

Membership Category		Mo	onthly R	ates		One-Time Joining Fees
Youth/Teen Under Age 18	\$22	•	\$14	•	\$10	\$20
Individual Adult Age 18 or Over	\$44	•	\$27		\$20	\$75
Adult Couple	\$64	•	\$40	•	\$30	\$100
Senior	\$40		\$25		\$19	\$70
Family	\$78	•	\$48		\$36	\$100
Senior Couple	\$60	•	\$37	• 1	\$28	\$100

Figure 9.02 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 that currently belong to a YMCA from the projected number of households in the area for the year 2015 (Figure 9.03 below).

Projected Number of Households
Households in the Area for Year 2015
20,716*

Number of Households that Currently Belong to the YMCA 20,716

n/a

Total Number of Households to the YMCA 20,716

Figure 9.03 Formula for Calculating the Adjusted Number of Households

The study findings did not indicate any households that currently belong to another YMCA. With no current member households to exclude, the total number of households in the survey area that will be used in forecasting is 20,716.

Given the <u>percentage</u> of households with *a great deal of interest* in an annual membership at a new YMCA, we can determine the <u>number</u> of households in the targeted area with the highest level of interest in an annual membership. We use the following formula (Figure 9.04 below) to forecast the number of households with *a great deal of interest*.

% of Respondents with A Great Deal of Interest X Total Number of Households of Households = Number of Households with A Great Deal of Interest

Figure 9.04 Formula for Calculating the Number of Households that will Join

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

^{*}See Population Trends Analysis, page 18.

Forecasts for a New YMCA in Palmetto

The following table calculates the number of households with a great deal of interest in joining the new YMCA in Palmetto. The rates quoted to respondents are outlined in Figure 9.02 on page 57. The table also illustrates the number of households with a lot of interest in joining, the second highest level of interest in joining.

Pricing Option	Percentage of Households with A Great Deal of Interest in Joining = 9.8%	x	Total Number of Households	-	Forecast of Number of Households with A Great Deal of Interest in Joining
Current Countywide Rates	3.4%	X	20,716	=	704
Current Countywide Rates PLUS 1st-Choice Additional Feature*	0.2%	X	20,716	=	41
Current Branch-Only Rates	6.2%	х	20,716	=	1,284
a New YMCA in Palmet	with A Great De	al of		ning	2,029
a New YMCA in Palmett	with A L	ot of	ber of Househo Interest in Joir Into Considera	ing	41

Note 1: These numbers do not take into account prospective members who may terminate their memberships during the first year.

Note 2: The study did not find any demand for the proposed sliding scale rates.

Figure 9.05 Forecasted Number of Households for a New YMCA in Palmetto
Before Location is Taken into Consideration

^{*60%} of prospective members preferred the indoor warm-water pool as first choice, 30% preferred the indoor gym as first choice, and 10% said that either the pool or gym was first-choice.

Location Preference for a new YMCA in Palmetto among Prospective Members

The following graph shows the location preference for a new YMCA in Palmetto among prospective members at one of the two proposed locations. The percentages reflect those respondents who chose each given location as their first choice, would seriously consider the other location if their first-choice is not built, or said that either location was equally preferred.

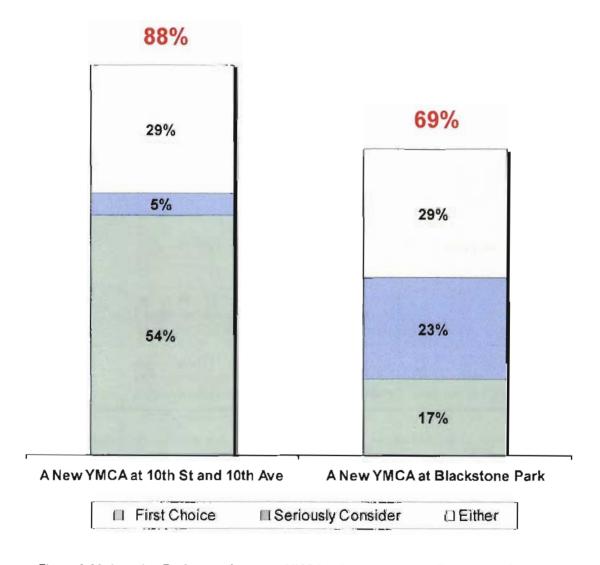
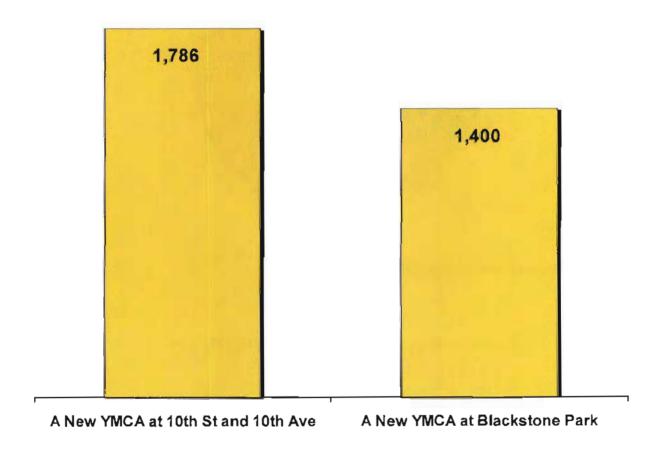


Figure 9.06 Location Preference for a new YMCA in Palmetto among Prospective Members

Forecast of Households for a New YMCA in Palmetto at Each Proposed Location

The following chart shows the number of households for a new YMCA in Palmetto at each proposed location. The figures for each location are calculated by multiplying 2,029 households (number of households with a great deal of interest in joining the new YMCA, Figure 9.05, page 57) by the percentage of prospective members that prefer each location (Figure 9.06, previous page).

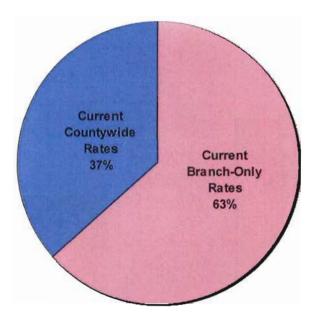


Note 1: There are an additional 36 households with a lot of interest in joining a new YMCA at 10th St and 10th Ave. Note 2: There are an additional 28 households with a lot of interest in joining the new YMCA at Blackstone Park.

Figure 9.07 Forecast of Households for a New YMCA in Palmetto at Each Proposed Location

Pricing Preference among Prospective Members

The pie chart below shows the willingness of prospective members with a great deal of interest in the new YMCA to pay one of the three pricing structures* offered.



^{*}The sliding scale pricing structure received insignificant interest.

Figure 9.08 Pricing Preference Among Prospective Members

Forecast of Annual Revenue Generated at a New YMCA

The following table (Figure 9.09) illustrates the formula used to forecast the annual revenue generated from new memberships sold (not retained) at a new YMCA in Palmetto. Figure 9.10 below forecasts the annual revenue generated at the new YMCA at one of the two proposed locations. 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 Interested In a Membership Category	x	Annual Rate	=	Revenue Generated
	X	2% Youth/Teen Memberships	X	\$	=	\$
	X	28% Individual Adult Memberships	Х	\$	=	\$
forecast of number	X	28% Adult Couple Memberships	X	\$	=	\$
of households at each pricing option	X	6% Senior Memberships	X	\$	=	\$
	X	26% Family Memberships	X	\$	=	\$
	X	10% Senior Couple Memberships	Х	\$	=	\$
Forecaste	ed Ar	nnual Revenue Generated from New	Men	berships S	Sold	\$

Figure 9.09 Formula for Calculating Annual Revenue



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

Figure 9.10 Forecast of Annual Revenue Generated from Memberships Sold

Forecast of Golf Memberships

Along with a variety of programs and activities that could be offered by a new YMCA, FourSquare Research asked respondents their level of interest in a golf membership that would provide access to a golf course with a practice range and 18 executive holes. The course is located at Terra Ceia adjacent to Blackstone Park north of Palmetto High School.

The golf membership would offer unlimited tee-time and no cart fees and the cost would be \$750/year for an individual adult and \$1,500/year for a family. The table below forecasts the level of interest in a golf membership.

	Percentage of Households Interested in a Golf Membership	x	Total Number of Households in the Targeted Survey Area	-	Forecast of Number of Households Interested in a Golf Membership
A Great Deal of Interest	0.2%	X	20,716	=	41 \$35,978
A Lot of Interest	0.8%	X	20,716	=	166 \$145,665

Note: 83% of respondents preferred an individual adult golf membership and the remaining 17% preferred a family golf membership.

Figure 9.11 Forecasts for Golf Membership

Membership Projections Logic Model

The table below summarizes the findings of the market research study that forecasts the demand for a new YMCA in Palmetto at one of two proposed locations.

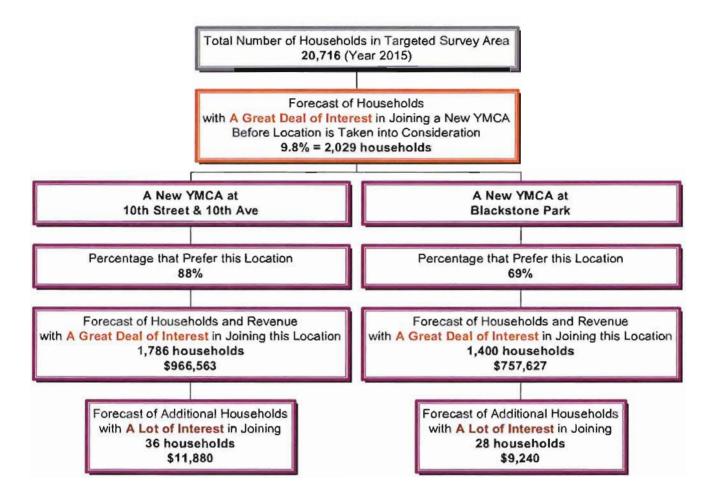


Figure 9.12 Membership Projections Logic Model

Reasons Area Residents Are Not Interested in the YMCA

The following table shows the reasons why area residents who are not currently involved with a YMCA are not interested in joining a new YMCA in Palmetto.

Response Item	Percentage of Those Not Interested (Multiple Responses OK)
Lack of Interest/Personal Barriers	64%
Just not interested	25%
Wouldn't use	14%
No time	11%
Too old	5%
Health problems	5%
Not into fitness	2%
Don't like gyms/crowds	1%
Only interested in programs	1%
Satisfied with Current Affiliation	18%
Satisfied where I currently belong	8%
Own equipment/exercise at home	8%
Prefer outdoor activities	2%
Money-Related	7%
Costs too much/can't afford	6%
Unemployed	1%
Location-Related	6%
Location not convenient	5%
Moving/visiting	1%
Child-Related	3%
No kids	2%
Kids grown	1%
Need Additional Information	2%
Would like to see Y first	2%

Figure 9.13 Reasons Area Residents Not Interested in a new YMCA in Palmetto

Chapter 10
Profile of
Prospective Members

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Prospective members are area households with at least a lot of interest in joining a new YMCA in Palmetto, Florida.

Age of Prospective Members

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

Age	Prospective Members	General Population		
Ages 18-19	-	2%		
Ages 20-24	_	7%		
Ages 25-34	14%	12%		
Ages 35-44	19%	11%		
Ages 45-54	27%	12%		
Ages 55-64	33%	10%		
Ages 65-74	2%	9%		
Ages 75+	3%	12%		
Refused	2%	_		

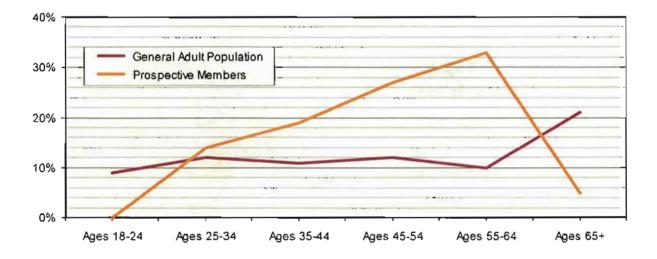


Figure 10.01 Age of Prospective Adult Members and the General Population

Ethnic Background of Prospective Members

The following chart compares the ethnic backgrounds of prospective members.

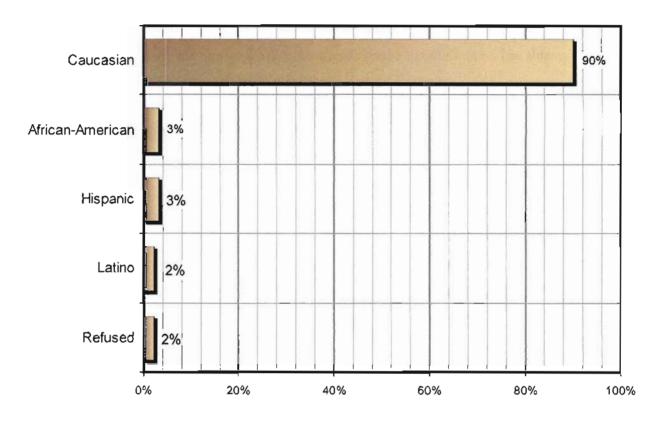
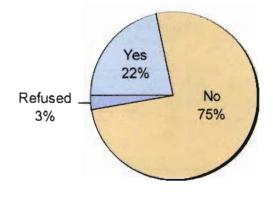


Figure 10.02 Ethnic Background of Prospective Members

Percentage of Prospective Members with Children in the Household

The the chart to the right 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 10.03 Prospective Members with Children Under Age 18 in Their Households

Membership Categories of Prospective Members

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

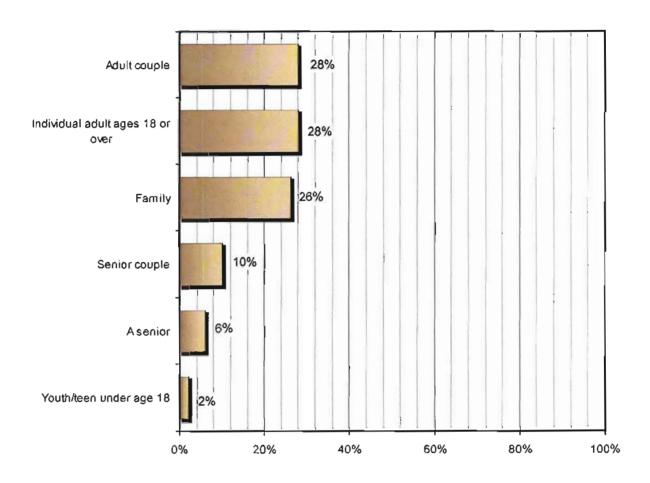
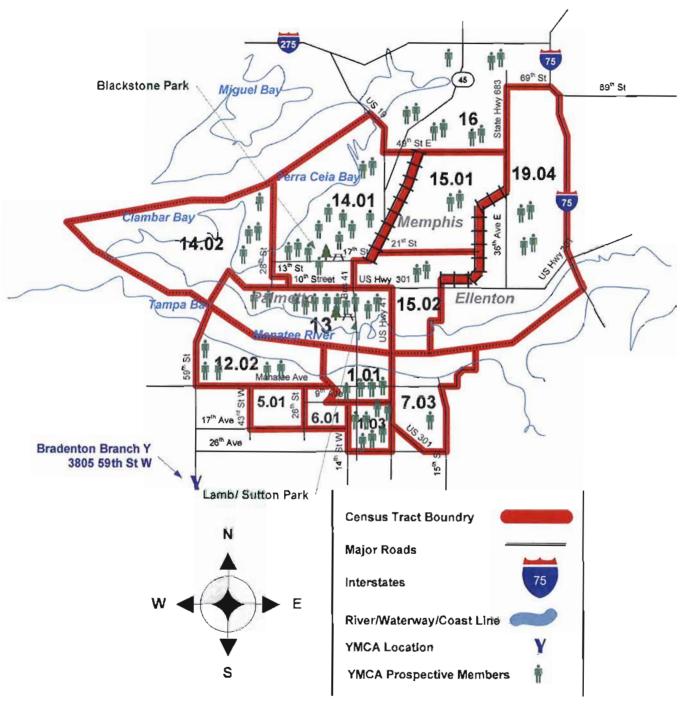


Figure 10.04 Membership Categories of Prospective Members

Census Tract Locations of Prospective Members

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



Note: Prospective member households are plotted at random within the appropriate census tracts and do not represent actual addresses.

Figure 10.05 Census Tract Locations of Prospective Members

Percentage of Prospective Members Who Live in the Area Year-Round

The chart on the left shows the percentage of prospective members who said they live in the area year-round. The chart on the right shows how many months out of the year that the seasonal residents live in the area.

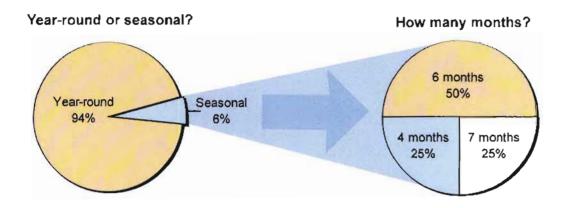


Figure 10.06 Percentage of Prospective Members Who Live in the Area Year-Round

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Chapter 11
Interest in Programming
for Children and Families

Interest in Summer Day Camps among Prospective Members

The following table shows the level of interest in different activities for summer day camps at an average cost of \$130/week among prospective members with children under 18 in the household.

Summer day cam	ips*	3–5	6–9	10–13	14-17
Traditional summ games, and arts a	er day camp with swimming, nd crafts	Moderate	Moderate	Moderate	
Full-day sports	camp	Low	Moderate	Low	Very Low
	Basketball		Very Low	Low	Very Low
	Indoor soccer		Low	Very Low	Very Low
Sports camps	Outdoor soccer		Low	Very Low	Very Low
	Roller hockey		Low	Very Low	Very Low
	T-ball/baseball/softball	Low	Very Low	Very Low	Very Low
Specialty creative drama, and music	e arts camp with drawing,	Low	Moderate	Low	
Specialty learning computers, math,	g lab camp with lessons in and science	Low	Low	Low	Very Low
•	venture camp with hiking, s, and water sports			Low	Very Low

Figure 11.02 Interest in Summer Day Camps among Prospective Members

^{*}Specially golf camp with lessons, practices and tee times was also tested and received insignificant interest.

Interest in Babysitting, Child Care, After-School, or 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.

Child care programs	Infant-2	3–5	6–9	10–13
Baby-sitting while parents work out	Moderate	Moderate		
A kids' gym with supervised features such as moonwalks and a climbing maze while parents work out		Moderate	Moderate	Low
Arts programs with crafts, plays, story time and movement activities		Moderate	Low	
Full-day licensed Infant care at \$195/week	Low			
Parents' Night Out fun program for children at \$5/child		Low	Moderate	Low
Full-day licensed preschool child care at \$125/week		Low		
Licensed before- and after-school programs 5 days/ week at the school for \$55/week		TA 11 1 1 1 1	Low	Very Low
Full-day care on school holldays at the Y at \$15/day		Low	Low	Very Low

Figure 11.01 Interest in Babysitting, Child Care, After-school, and Child Development Programs among Prospective Members

Interest in Summer Day Camps among Prospective Members

The following table shows the level of interest in different activities for summer day camps at an average cost of \$130/week among prospective members with children under 18 in the household.

Summer day cam	ps*	3–5	6–9	10–13	14-17
Traditional summer games, and arts ar	er day camp with swimming, nd crafts	Moderate	Moderate	Moderate	
Full-day sports of	amp	Low	Moderate	Low	Very Low
	Basketball		Very Low	Low	Very Low
	Indoor soccer		Low	Very Low	Very Low
Sports camps	Outdoor soccer		Low	Very Low	Very Low
	Roller hockey		Low	Very Low	Very Low
	T-ball/baseball/softball	Low	Very Low	Low	Very Low
Specialty creative drama, and music	e arts camp with drawing,	Low	Moderate	Low	
Specialty learning computers, math,	g lab camp with lessons in and science	Low	Low	Low	Very Low
	venture camp with hiking, s, and water sports			Low	Very Low

Figure 11.02 Interest in Summer Day Camps among Prospective Members

^{*}Specialty golf camp with lessons, practices and tee times was also tested and received insignificant interest.

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 and teenagers at \$48/8 weeks.

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

Figure 11.03 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 indoor sports leagues for children and teens.

Sports leagues	3-5	6–9	10–13	14–17
Soccer	Low	Moderate	Very Low	Very Low
Ice hockey	Low	Low	Low	Very Low
Tennis	Low	Very Low	Very Low	Very Low
Basketball	Very Low	Low	Low	Very Low
Roller hockey	Very Low	Low	Very Low	Very Low
Volleyball	Very Low	Low	Very Low	Very Low

Figure 11.04 Interest in Indoor Sports Leagues for Children and Teenagers among Area Resident Prospective Members

^{*}All other sports leagues received insignificant interest.

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

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

Social activities and features	10–13	14-17
a teen lounge with TV and pool tables or a teen center with social and play areas and a homework station	Moderate	Low
teen nights with movies, food, and dancing	Low	Very Low
Wednesday after school programs for middle-school children	Low	Very Low
Recreational activities		
creative classes like hip hop, break dancing, and dee-jaying	Low	Low
stage for theater and bands	Low	Low
sound and media production facility for recording and videotaping your own music and movie	Low	Low
Fitness activities		The second
yoga and kickboxing	Low	Low
a teen fitness center where teens learn weight training techniques	Low	Very Low

Figure 11.05 Interest in Social, Recreational and Fitness Activities for Older Children and Teenagers among Prospective Members

Interest in Activities Parents and Children Can Do Together among Prospective Members

The following chart shows the level of interest in activities parents and children can do together among prospective members with children in the household.

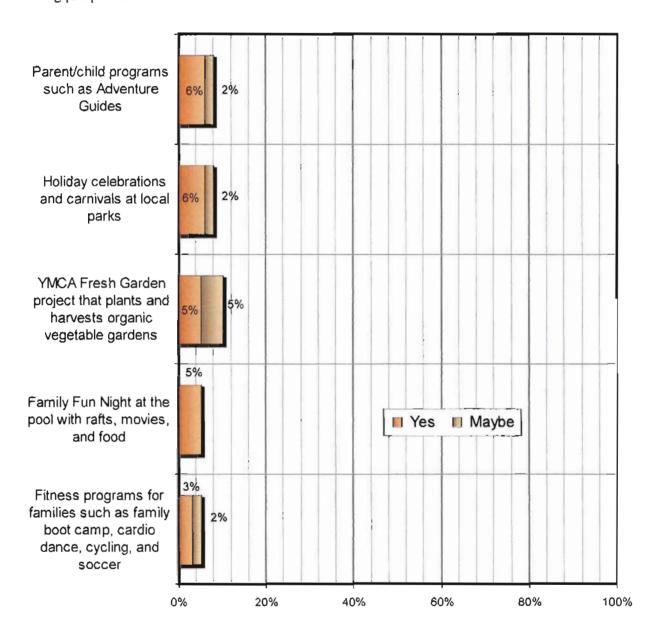
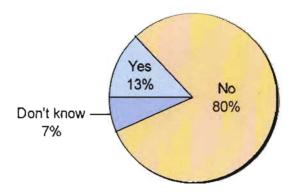


Figure 11.06 Interest in Activities Parents and Children Can Do Together among Prospective Members with Children

Percentage of Prospective Members with Children with Physical, Mental, or Developmental Disabilities

The following chart shows the percentage of prospective members with children with physical, mental or developmental disabilities.



When those respondents who answered yes were asked if they would mind sharing their child's diagnosis or special needs, 100% answered behavioral/ADD.

Figure 11.07 Percentage of Prospective Members with Children with Physical, Mental, or Developmental Disabilities



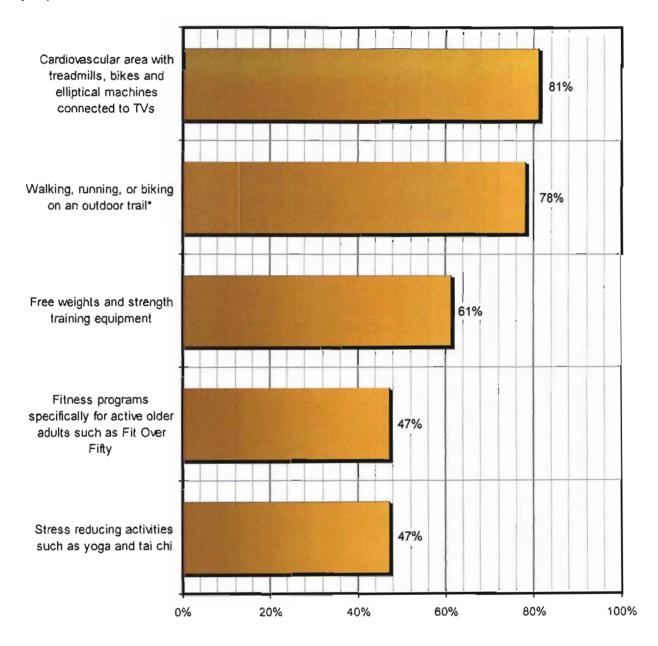
Chapter 12 Interest in Fitness and Wellness for Adults

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., $10\% = 10\% \times 1,786$ units = 179 units)



Interest in Fitness Activities for Adults

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



^{*}See Figure 12.03 on page 89 for preferred features on the outdoor trail among prospective members.

Figure 12.01 Prospective Members' 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.

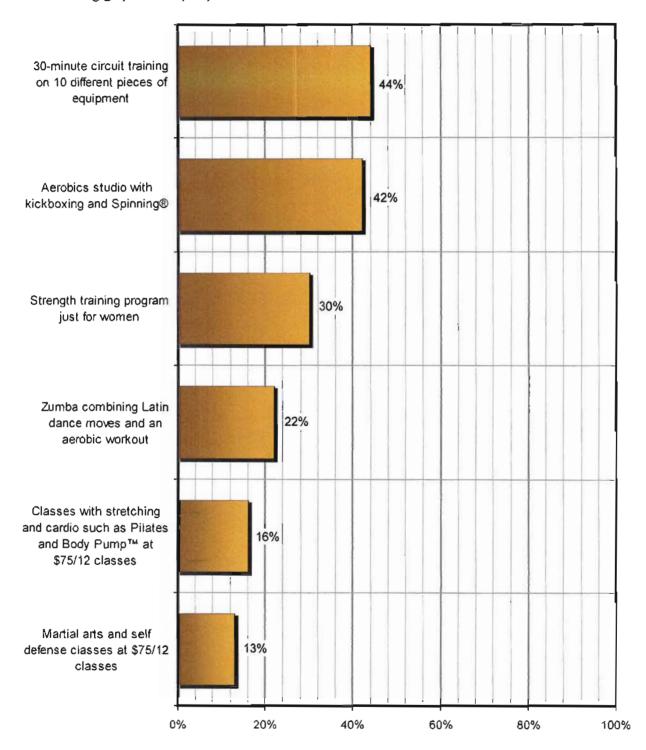


Figure 12.02 Interest in Fitness Activities for Adults (continued)

Interest in Features on the Outdoor Trail System among Prospective Members

The following graph shows the level of interest in features on a 10-mile outdoor trail system connecting all parks in Palmetto, the southern bank of the Manatee River, and north Bradenton among prospective members.

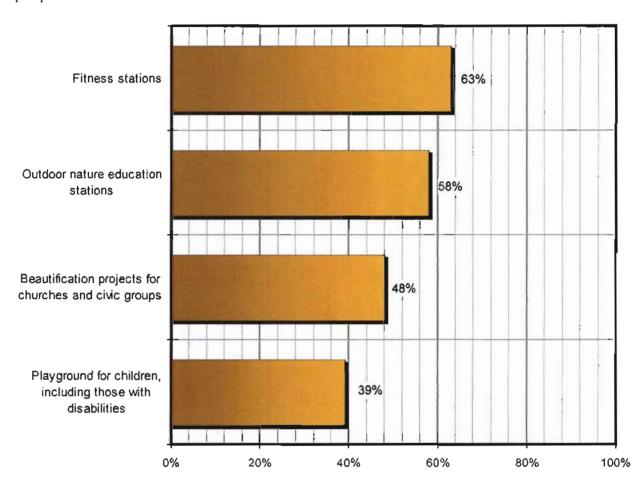


Figure 12.03 Interest in Features on the Outdoor Trail System among Prospective Members

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 hospital.

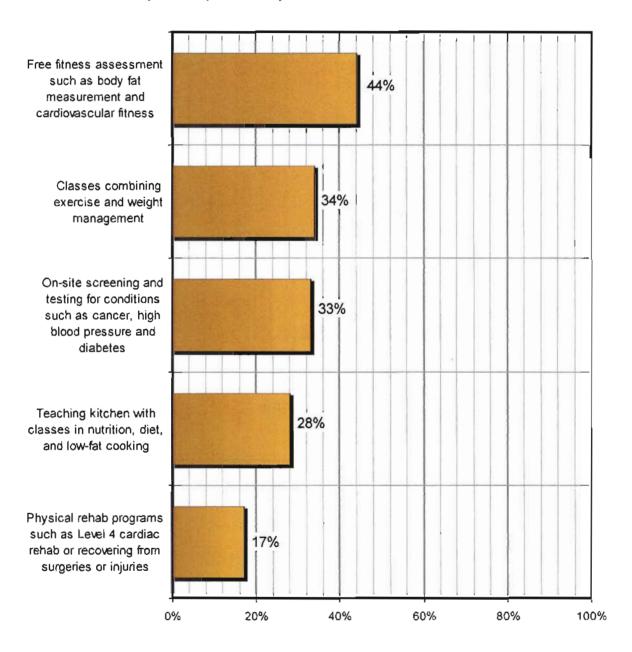
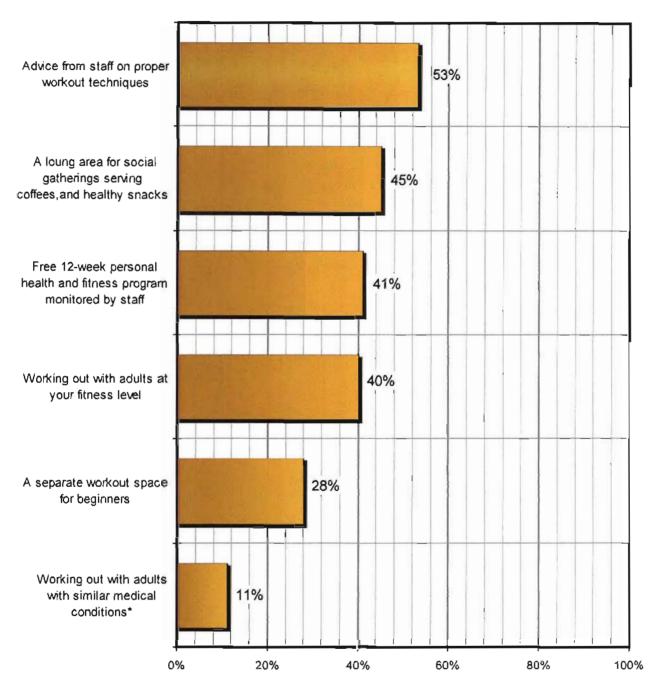


Figure 12.04 Prospective Members' Interest in Health and Wellness Programs for Adults

How Prospective Members Want to be Served

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

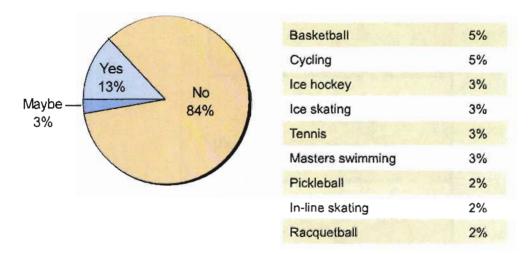


^{*}Arthritis, back problems, knee, and heart condition were cited.

Figure 12.05 How Prospective Members Want to be Served

Interest in Indoor Sports Leagues for Adults

The pie chart on the left shows the percentage of prospective members who said they were interested in indoor sports leagues for adults at \$35/person for a season. The table to the right shows which ones they preferred.



^{*}All other sports leagues received insignificant interest.

Figure 12.06 Interest in Indoor Sports Leagues for Adults

Chapter 13 Interest in Aquatics for Children and Adults Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Interest in Aquatic Programs for Children and Teens among Prospective Members

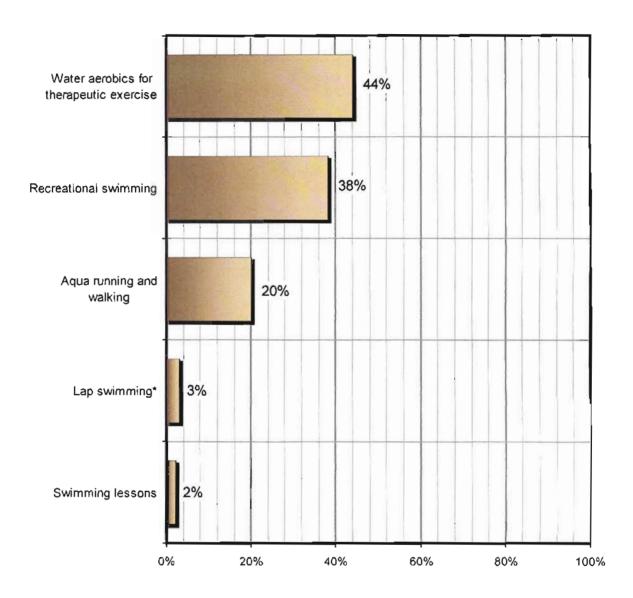
The following table shows the level of interest in aquatic programs for children and teens among prospective members.

Pool activities	Infant-2	3–5	6–9	10–13	14-17
Recreational swimming using water playground features such as sprays and slides		Moderate	Moderate	Moderate	Moderate
Parent and infant swim classes	Moderate				
Swim lessons		Moderate	Low	Very Low	Very Low
Swlm teams at \$125 for a season (3 months)					Very Low
Lifeguard training at \$140 for an 8-week session					Very Low

Figure 13.01 Interest in Aquatic Programs for Children and Teens among Prospective Members

Interest in Aquatic Programs for Adults

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



^{*100%} said they were currently a lap swimmer.

Figure 13.02 Interest in Aquatic Programs for Adults among Prospective Members

Chapter 14
Strategic Questions and Answers



Strategic Questions and Answers for Outdoor Recreational Activities and a New YMCA in Palmetto

The Consultant recommends that in order to meet the demand for outdoor recreational activities at various Palmetto city parks and achieve the forecasts for new membership units for a new YMCA in Palmetto, the leaders of the Manatee County YMCA and the City of Palmetto should carefully consider the answers to all of the following questions:

- 1. Does interest exist for a variety of outdoor recreational activities at Palmetto city parks?
- 2. Does interest exist for a new YMCA in Palmetto?
- 3. Does the study indicate which location works better for a new YMCA in Palmetto?
- 4. Does the study reveal characteristics of the community that are critical to the success of outdoor recreational programs and a new YMCA in Palmetto?
- 5. Are there factors that could increase or decrease the forecasts of the demand for outdoor recreational activities and new membership units for a new YMCA?
- 6. Does the current YMCA pricing structure work for a new YMCA in Palmetto?
- 7. Who are prospective members of a new YMCA in Palmetto?
- 8. Are there recommendations on the facility development of a new YMCA in Palmetto?

1. Does interest exist for a variety of outdoor recreational activities at Palmetto city parks?

Yes, especially outdoor fitness, outdoor water sports, and adventure

As illustrated in Figure 12.01, page 87, the study revealed **buge interest** for walking and running or biking on an outdoor trail as 78% of prospective members expressed interest in the activities. The proposed outdoor trail system that connects all parks in Palmetto is well received as 76% said yes. Among features on the trail system, the most popular ones are fitness stations, outdoor nature stations, and beautification projects for churches and civic groups.

Outdoor water sports such as canoeing, kayaking, fishing and crewing were also popular for both adults and families with children. One-third (33%) of prospective members expressed interest in these activities for themselves and another 38% for their children. Either Riverside Park or Estuary Park works, but families with children overwhelmingly preferred Riverside Park.

Some outdoor adventure activities were also popular among both adults and children. A quarter (25%) prospective members indicated interest in outdoor high ropes course and climbing towers for themselves, which was also popular among prospective members with children ages 10-13. Prospective members with children ages 10-13 also expressed interest in a BMX bike track and outdoor zip lines for their children. Moreover the proposed park to host all these activities—Estuary Park, was perceived very convenient by 67% of all prospective members with interest in the activities.

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

Outdoor sports/ball fields received more interest among families with children than among adults. More than three out of 10 (31%) prospective members with children expressed interest in outdoor sports leagues for their children. In comparison, only 16% of prospective members expressed interest for themselves. Among three potential sites for outdoor sports/ball fields, the location at 10th Street and 10th Avenue in Palmetto was a clear winner, with 80% of prospective members with children choosing the location for their children and 73% of prospective members for themselves.

Based on these findings it is clear that the demand for outdoor recreational activities at Palmetto city parks exists. And the City of Palmetto should consider developing its parks to accommodate the demand.

2. Does interest exist for a new YMCA in Palmetto?

Absolutely, huge amount of interest, more than double the national average

Findings revealed huge interest for a new YMCA in Palmetto regardless of the location. As illustrated in Figure 9.07, page 61, of all households that currently do not belong to a YMCA in the area targeted for the study, a total of 9.8% of all households had a great deal of interest in joining a new YMCA in Palmetto regardless of location. 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.

There is another 0.2% of households who had a lot of interest in joining. Please note that the Consultant typically bases forecasts only on those with a great deal of interest.

The YMCA's national average for household penetration is about 4.5%. The total potential household penetration for a new YMCA in Palmetto is more than double the national average at 9.8%. These results indicate huge interest exists for expanded YMCA programs and services in the Palmetto area.

Please note these numbers forecasted represent memberships sold, not retained, during the first 15-18 months after the new facility is built and 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.

3. Does the study indicate which location works better for a new YMCA in Palmetto?

Yes, at 10th Street and 10th Avenue

Two locations were offered to all respondents. The findings provided the following preference among prospective members as illustrated in Figure 9.06, page 60:

- At 10th Street and 10th Avenue location: 59% of prospective members choose it as either their first choice or second choice.
- At the Blackstone Park location: 40% of prospective members choose it as either their first choice or second choice location
- Twenty-nine percent (29%) of prospective members choose either location.

Based on these findings, the study forecasts 1,786 households with a great deal of interest in joining a new YMCA at the 10th Street and 10th Avenue location and only 1,400 households for the Blackstone Park location. The difference of 19%, or 386 units, is statistically significant.

4. Does the study reveal other characteristics of the community that are critical to the success of outdoor recreational programs and a new YMCA in Palmetto?

Yes

The study also revealed the following characteristics of households in the survey area that are important for the success of outdoor recreational programs and a new YMCA in Palmetto:

- The general population is relatively physically active but ill-equipped with knowledge of healthy living. Well over half (57%) of households indicated they currently engaged in any type of physical activity, which is just above the national average of 55%. However, only 40%chose the statement I am good at every day choices to be healthy and live well, and the remaining 60% stated either I try, but struggle to do so or Don't know. Serving a population ill-equipped with knowledge of healthy living requires more dedicated and diverse efforts.
- Many for-profit providers already exist in a crowded market place. Three in ten households (30% of) said they already belong to or participate in some type of nonprofit or for-profit fitness, recreation, sports club or facility, a level much higher the national average of 25%. A total of seven names of for-profit providers were mentioned, serving a combined 4% of all households, which is much higher than the national average of 8%. All these findings suggest a crowded market place. In order to carve out a niche in this crowded marketplace, a new YMCA in Palmetto and the providers of the outdoor recreational programs need to provide a state-of-the-art facility with top-notch quality programs and services, targeting its primary prospective members groups (which will be discussed later in the section).

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

- The population growth in the area is stagnant. The projected growth in the area for the next five years is less than 1%, compared to the national average of 5%. This means the YMCA will not have the luxury of new families moving to replenish membership may lost after the first year of the new facility is built. Therefore focusing on high retention should start on day one.
- The awareness of the YMCA name is high. As indicated in graphs on page 23, the overall awareness of the YMCA is high with 40% of all area households saying they were aware of any YMCAs in or near their community. Findings revealed the awareness of the Y was largely attributed to the presence of the Bradenton Branch YMCA. This bodes well for the Manatee County YMCA to expand its services with a new facility in Palmetto.

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

Yes

The table below provides insight on additional factors that could increase or decrease the forecasts of new membership units for a new YMCA and the demand for outdoor recreational activities in Palmetto.

Forecast Could Increase If...

- a new YMCA in Palmetto is able to attract a significant portion of those households with a lot of interest in joining with aggressive marketing.
- a new YMCA in Palmetto is able to attract households outside the survey area through leveraging the YMCA facilities in the area and partnerships with organizations such as County School District and other area employers.
- 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 the City of Palmetto for a variety of outdoor sports and recreational activities, schools for before- and after-school programs and teen programs.

Forecast Could Decrease If...

- · there are similar service providers that capture 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 14.01 Factors that Could Increase or Decrease Forecasts of New Membership Units

6. Does the current YMCA pricing structure work for a new YMCA in Palmetto?

No, both current, county-wide rates and new branch-only rates are needed.

The median household income in the survey area was only \$41,828 in 2010, about \$10,000 lower than the national median household income. Anticipating price-sensitivity, two levels of pricing were tested. The findings revealed the following:

- Among all prospective members, only over one-third (37%) indicated a great deal of interest in joining at the higher, current county-wide rates.
- The remaining majority (63%) only expressed the interest at the lower, new branch-only rates.

If the new YMCA only offers its current county-wide rates, it risks losing the majority number of household units and sizable amount of membership revenue. Based on these findings, the Consultant recommends the Y implementing both higher, current county-wide rates and new branch-only rates.

By doing that, a new YMCA in Palmetto could not only attract the maximum number of households, maximize its membership revenue potential, and better serve the community by providing quality facility and services.

7. Who are the prospective members of a new YMCA in Palmetto?

Families with children, aging baby-boomer, and Healthseekers, many require the hand-holding approach and desire for a community club

Consider the following demographics of prospective members of a new YMCA in Palmetto:

- Nearly a quarter of prospective members (22%) said they had children under age 18 in their homes. As a result, family supporting services to enable family members to use the facility with convenience and ease such as baby-sitting while parents work out, and a kids' play center for older kids were of moderate to high interest among prospective members.
- Nearly six out of 10 of prospective members were ages 35-44 (27%) and 45-55 (33%).
- The majority (53%) said they tried to make everyday choices to be healthy and live well, but struggle to do so, which is typically of Health-seekers. As a result 53% expressed interest in having Y staff offer them advice on proper workout techniques and 41% in a free 12-week personal health and fitness plan based on your goals and monitored by Y staff.

Opportunities for Outdoor Recreational Activities and a New YMCA in Palmetto, Florida

• Nearly half of prospective members (45%) expressed interest in a lounge area for social gathering that serves healthy snacks

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

8. Are there recommendations on the facility development of a new YMCA in Palmetto?

Yes

If the decision is made to proceed with building a new YMCA at the 10th Street and 10th Avenue location, the Consultant recommends a facility of approximately 15,000 square feet indoors with an outdoor, year-round family pool.

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 nearly 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, then lists **space allocation** recommended for a new YMCA in Palmetto at the 10th Street and 10th Avenue location.

		Feat	Features of a New Palmetto YMCA	Palmetto YM	CA		
Programs	Fitness Center	Aerobics Studios	Outdoor Family Pool	Indoor Multi- purpose Gymnasium	Child Watch/ Babysitting	Kids Zone	Youth and Teen Center
Adult Fitness	Very High	Very High					
Adult Aquatics							
Adult Adventure							
Adult Sports				Low			
Adult Recreation							
Nutrition and Weight Management			Very High				
Stress and Relaxation		High					
Health Programs			High				
Women's Programs	Very High						
Family Activities							
Programs for Children Ages 0-2				901 671 (700			
Programs for Children Ages 3-5		Low	Low	Low	Moderate		
Programs for Children Ages 6–9		Low	Low	Low	Moderate	Moderate	
Programs for Children Ages 10–13	Moderate	Low	Moderate	Low		Moderate	Moderate
Programs for Children Ages 14–17	Low	Low	Low	Low	100 A		Low
Adult Rating Scale	Low	<15%	%	Children's Rating Scale	ng Scale	Low	%9>
	Moderate	15%-29%	29%			Mod	Moderate 5%-9%
	High	30%-44%	44%			High	10%-14%
	Very High		45%+			Very	Very High 15%+

Figure 14.02 Summary of Usage among Prospective Members

Indoor Features Critical in Attracting New Membership Units for a New Palmetto YMCA	Approximate Square Footage	Program Interest Findings
First-class wellness center that includes a cardiovascular area of 1,800 sq. ft. a free weights and strength-training equipment area of 1,500 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 200 sq. ft	4,000	Figure 11.03, Figure 12.01 Figure 12.02, & Figure 12.06
Two group exercise studios, one 1,000 square feet for aerobics, group fitness classes and the another 1,000 square feet for relaxation, dance, yoga, and tai chi	2,000	Figure 12.01, & Figure 12.02
Multipurpose classrooms, with dividers and a sink/wet area for arts classes, health programs, nutrition seminars, and weight loss programs	600	Figure 12.04
Child watch/baby-sitting area for infants to toddlers	800	Figure 11.01
A Kids zone with moonwalks and a climbing maze for older children	1,000	Figure 11.01
Youth and teen center with TV, pool tables, Exergame, and seating for social (which can also be used for other programs when needed)	1,000	Figure 11.05
Showers, lockers, and changing areas for men, women, and families	1,500	
Members' lounge/snack bar/social area/community program area	1,500	Figure 12.05
Subtotal	11,800	
Minimal planning factor, HAV/AC, bathrooms, halls, and offices (25%)	2,950	
Total Indoor	14,750	
Outdoor Features Critical in Attracting New Membership Units for a New Palmetto YMCA.		
An outdoor year-round family pool with • zero degree/beach entry for recreational swimming, lessons, and water aerobics • aquatic playground features such as splash pads and sprays • two lanes for lap swimming, aqua walking and running	N/A	Figure 11.02, Figure 13.01, & Figure 13.02

Figure 14.03 Indoor Features Critical to the Success of a new YMCA in Palmetto, Florida