

A large, faint background illustration on the left side of the page shows a hand holding a magnifying glass over a cluster of interlocking gears in various colors (grey, teal, orange, red, yellow, green).

**City of Tigard
YMCA of Columbia-Willamette
Feasibility Study
Report Findings & Highlights**

May, 2015

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Purpose and Methodology

Goal: *To determine community support levels for building a facility operated by the YMCA and funded by tax dollars*

Feasibility study specifically scoped to include:

- Appropriate pricing
- Forecast membership and usage
- Forecast demand for programs, facilities, and features

National call center approach:

- Representative contact lists of registered voters living within Tigard city limits
- Screening questions related to home ownership
- 501 qualified completed respondents (4.32% margin of error, 95% confidence level)
 - 380 Community members
 - 121 Current and former Y members



Parking Lot: *The results may be used to identify areas where stakeholders decide to dig-deeper and conduct additional analysis*

“My best analysis leads me to more questions”



Market Area Demographics & Psychographics

Incomes and home values are high compared to many YMCA markets and families are primarily educated professionals. Respondent demographics and city profile display a strong potential market.

Market Profile

- Population growing faster than the U.S. as a whole
- Age, % of households with children and home ownership rates on par with national averages
- Median family income and home values are higher than national averages

Tapestry Segmentation

National defined lifestyle segments indicate a majority of educated professionals, including:

- *Bright Young Professionals* = young, educated, working professionals
- *Soccer Moms* = affluent, family oriented, two working adults with children
- *Enterprising Professionals* = young, well-educated STEM professionals
- *Emerald City's* = young renters with no children, well-educated, median U.S. income
- *Metro Fusion* = young, diverse renters with young children

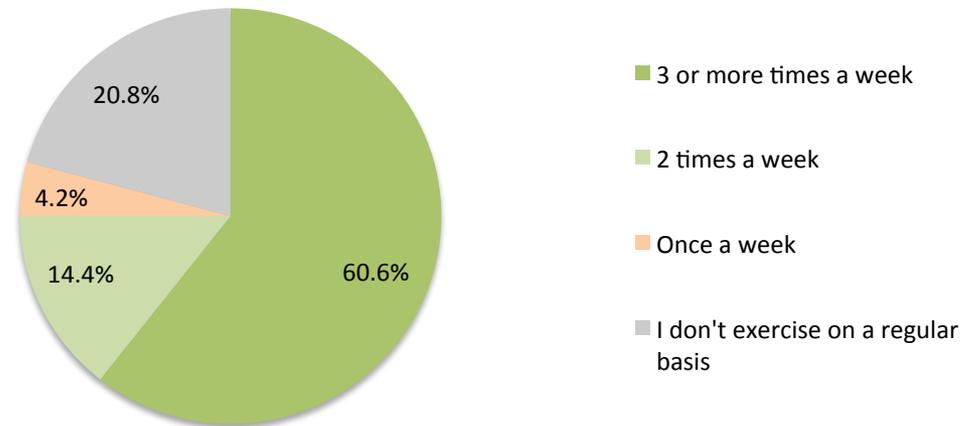


Current Exercise Habits

Tigard's population has a **high incidence of regular exercise** and relatively high use of exercise facilities.

- Nearly 61% of respondents currently exercise 3+ times per week
- 1/2 exercise at home + 1/3 exercise at a gym
- Use of for-profit fitness centers is strong and those used most often are *not* located within the City of Tigard

% of Exercise Per Week

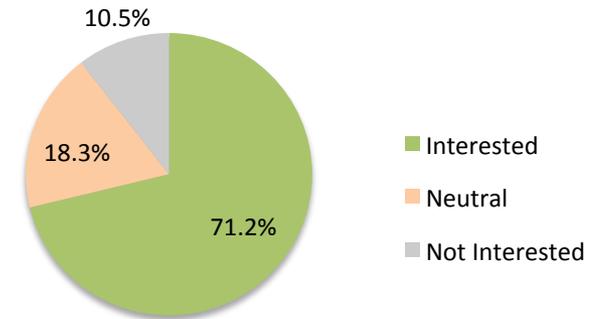


Demand for Programs and Facilities

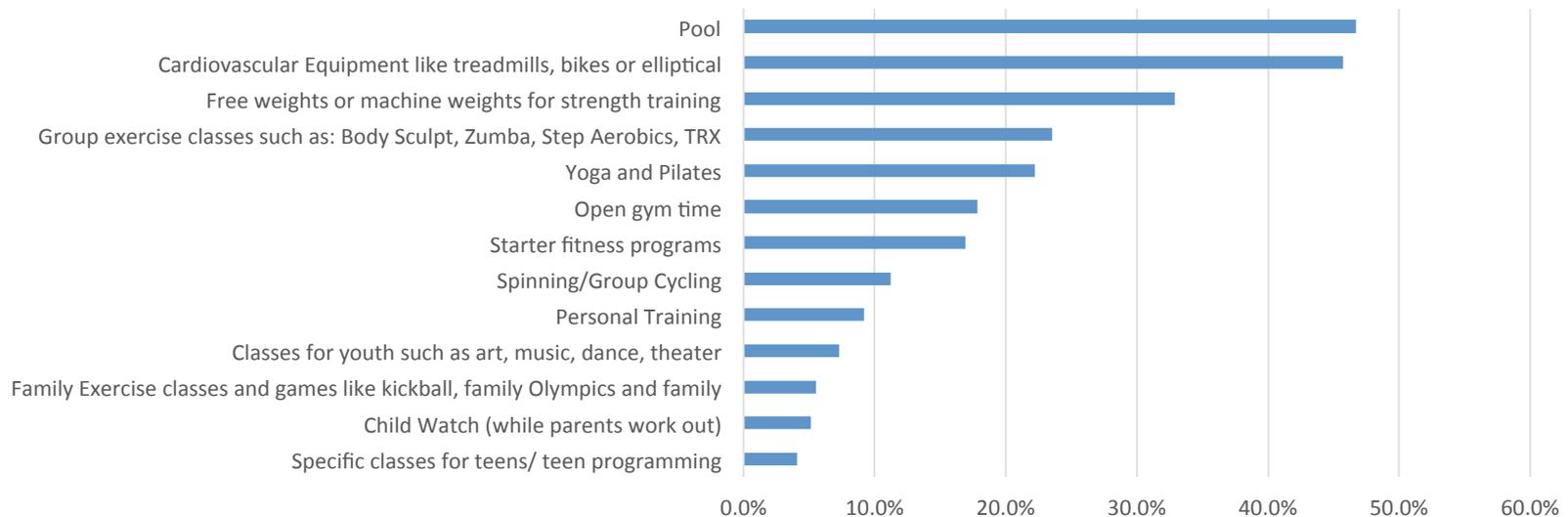
When asked about the likely frequency of use, respondents indicated a “**pool**” (46.7%) and “**cardiovascular**” (45.7%) exercise to be the of most interested at a potential Tigard YMCA.

71.2% of respondents with children reporting they would be “very interested” in using the potential facility.

% with those with children interested in using the Y



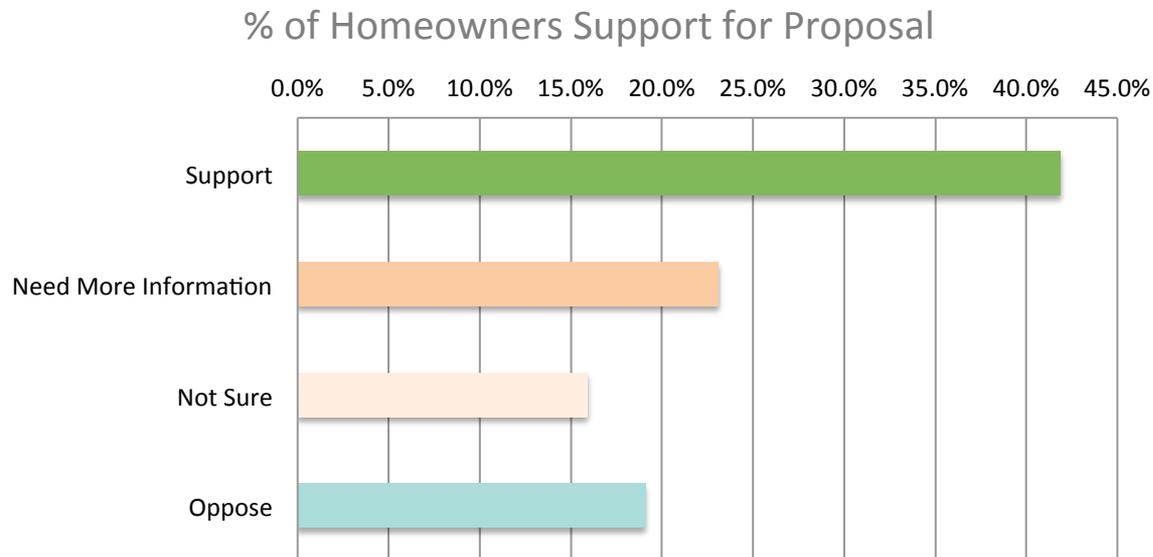
Would use often...



Financial Support for New Facility

41.9% of homeowners would support a \$10/month property tax increase for a new Y facility in Tigard; 39% are unsure or need more information

Note: findings are market research based and not interchangeable with voter polling

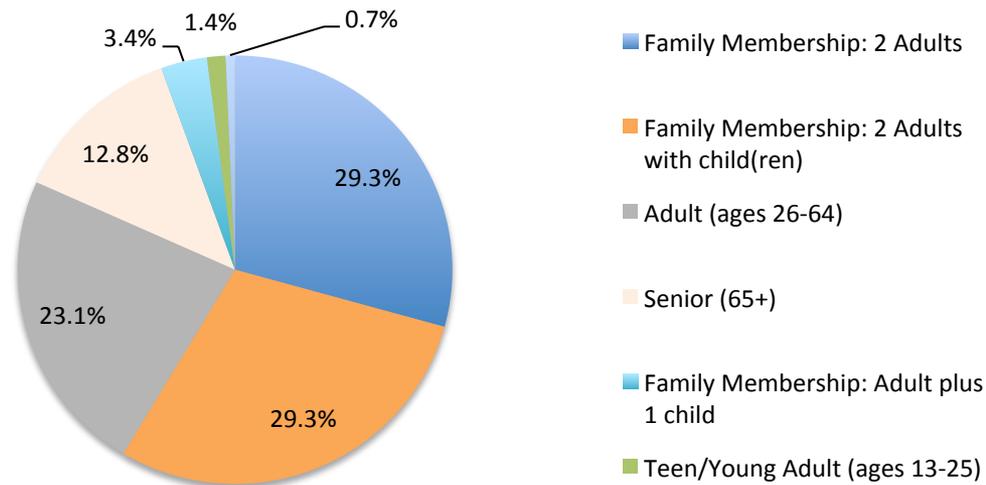


Membership Demand

The most commonly selected **membership types** reported:

- Family membership of 2 adults and no children (29.3%)
- Family membership of 2 adults and children (29.3%)
- Adult age 26-64 (23.1%)

% Interest in Membership Types



Membership Forecast

Based on conservative estimates, a new facility in Tigard would attract approximately **1,747 to 2,274 membership units within 3 years**

These projections are comparable to an existing Y near this market area

**the lowest price point = outlier*

Membership Type	Highest Price	Next Highest Price	Middle Price	Next Lowest Price	Lowest Price*
<i>Total potential new membership units at price level</i>	1,747	1,836	2,060	2,274	3,106

Recommendations

Based on study results ...

- **Proceeding with steps in developing a new Y facility** by using the forecasts of demand at different price levels and related findings to determine potential facility size and viable offerings
- Consider **plans to publicize/communicate** the potential new facility to the community in light of comparatively low opposition
- Exploring location options **within downtown Tigard**



Parking Lot



The Parking Lot is where questions that required additional analysis are captured for consideration and planning potential next steps.

“My best analysis leads me to more questions”

YMCA of Columbia-Willamette County & City of Tigard potential questions (so far):

- Voter polling in follow-up to levels of homeowner support expressed?
- Explore where community center fits within city priorities at this time?
- Consider steps needed to take a facility bond measure for voter consideration in context of other city priorities for funding and facilities?
- Determine capital and operating costs that might be indicated in Tigard for potential center or a potential facility size that may be feasible?
- Consider how a future partnership with a recreational operator might be structured in terms of an agreement?
- Consider timing and planning needed for site and facility planning, design, and construction?

