

What is a FourSquare Market Study?

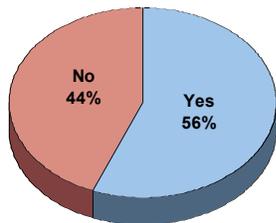
*W*hen you're facing critical decisions about important issues like expansion, new facilities, membership retention, and new programs, you need accurate, comprehensive data.

A FourSquare Market Study provides the information you need to plan for your organization's success.



Residents' Fitness and Recreation Activities

Percent Who Are Active



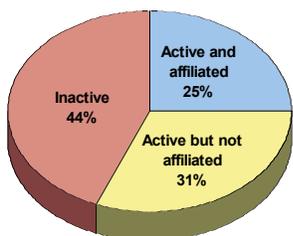
Top Fitness and Recreation Activities* (percentage of respondents/multiple responses)

Walking/running	30%
Various exercise	18%
Workout equipment/weights	9%
Aerobics	6%
Basketball	3%
Soccer	3%
Cycling	2%
Physical work on the job	2%
Swimming	2%
Working in yard/gardening	2%
Yoga/stretching/toning	2%

*All other activities fell at 1% or below.

Figure 3.01 Residents Currently Involved in Physical or Recreational Activities and the Top Activities

Providers



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

Own equipment/work out at home	6%
LA Fitness	5%
At work or school	4%
Bally's	2%
Curves for Women	2%
Area parks and recreation	2%
Area Country Clubs	1%
24 Hour Fitness	1%
Apartment/complex	1%
Other	1%

*All other providers fell below 1%.

Figure 3.02 Residents Who Belong to a Public or Private Health, Fitness, or Recreation Facility and the Top Providers

A FourSquare Market Study

A FourSquare Market Study will provide accurate forecasts for different facility and program options which helps you to position your YMCA within your own unique community. The study gives you a clear picture of the population you are serving, along with an accurate account of existing providers. Plus, you get hard data showing how much interest there is for your YMCA.

Household Penetration for the YMCA

The following graph illustrates the percentage of households with a great deal of interest in joining a new YMCA regardless of location. There were no households in the targeted service area that currently belong to a YMCA. Refer to Figure 4.01 on page 22 for a full description of the membership options.

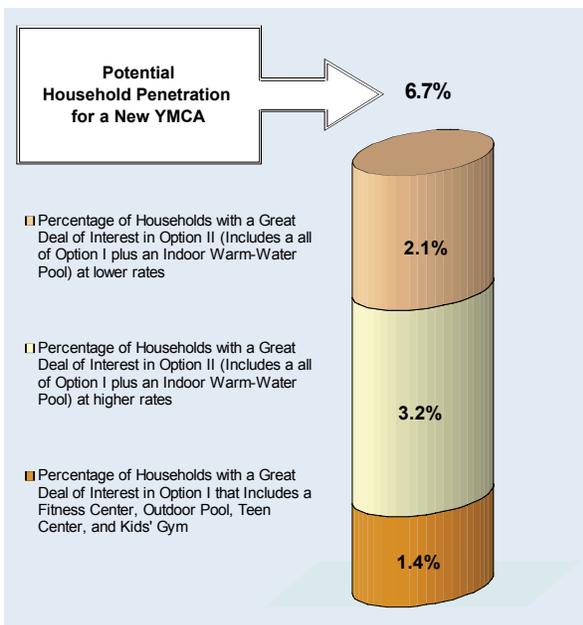
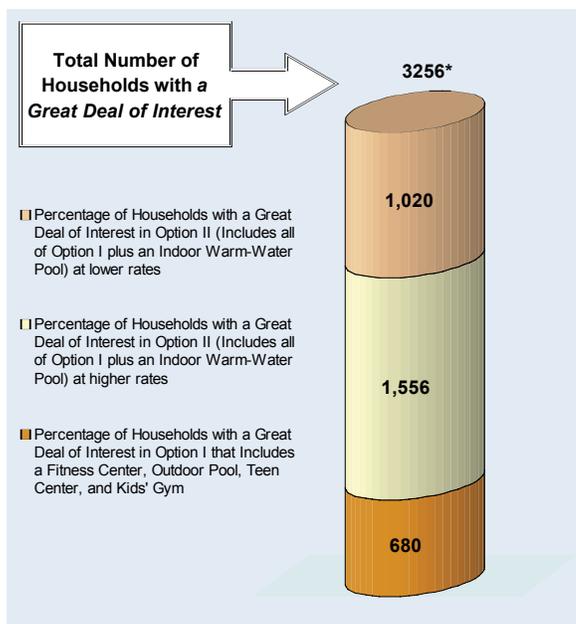


Figure 4.02 Household Penetration for a New YMCA

With the total number of households and the level of interest in joining a new YMCA, the Consultant is able to calculate the number of households with a great deal of interest, as illustrated in the following graph. Refer to Figure 4.05 below for a description of the membership options.

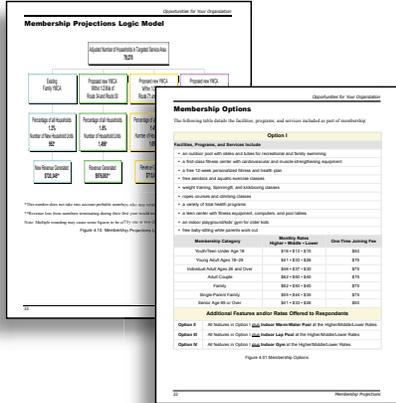


*This number does not take into account prospective members who may terminate their memberships.

Figure 4.03 Number of Household Units for a new YMCA Regardless of Location (Graph)

Membership Projections

All locations are not equal. Once a FourSquare Market Study evaluates all the possibilities, you get an adjusted forecast for each location.



Revenue Forecasts

A FourSquare Market Study provides forecasts of the membership revenue for your YMCA. This means that if you build a new YMCA you can be confident that people will come, providing sufficient operating revenue.

Location Preference

The following graph shows the location preference among prospective members of a new YMCA. The percentages reflect those respondents who chose a given location either as their *first choice*, would *seriously consider*, or indicated that *either* location was their preference.

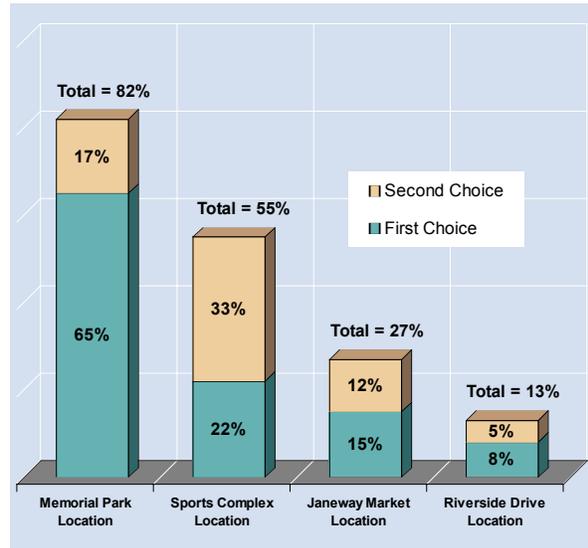


Figure 4.06 Location Preference Among Prospective Members

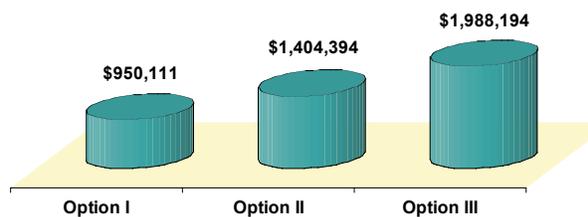
Due to the much higher percentage of prospective members who preferred the proposed location at Memorial Park, the remainder of the membership projections will focus only on the Memorial Park location. Refer to the *Membership Projections Logic Model* on page 32 for an abbreviated look at the number of household units and revenue generated each location.

Achievable Revenue from Household Units Sold at Each Location

We use the following table formula (Figure 4.12) to estimate the achievable membership revenue from household units sold (not retained) during the first 15–18 months of operations for each proposed location for a new Family Branch YMCA. Please note that the revenue forecasts do not include joining fees or revenue from program participation.

Achievable Number of Household Units at Each Rate Structure	X	Percentage of Prospective Members Interested in a Particular Membership Category	X	Annual Rate	=	Achievable Revenue
achievable number of household units at the metro rates and branch-only rates for each location	X	2% Youth/Teen Memberships	X	\$	=	\$
	X	2% Young Adult Memberships	X	\$	=	\$
	X	36% Individual Adult Memberships	X	\$	=	\$
	X	16% Adult Couple Memberships	X	\$	=	\$
	X	34% Family Memberships	X	\$	=	\$
	X	5% One-Parent Memberships	X	\$	=	\$
	X	5% Senior Memberships	X	\$	=	\$
Subtotal for Each Rate Structure						\$
Total Achievable Revenue from Household Units Sold During the First 15–18 Months of Operations at a New Family Branch YMCA						\$

Figure 4.12 Table Formula for Calculating Achievable Revenue



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

Figure 4.13 Achievable Revenue for Each Location

Age

The following table shows the age of adult prospective members, while the graph compares the age of prospective members to the age of the general population.

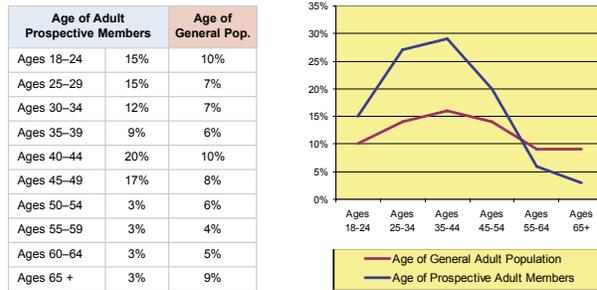


Figure 5.01 Age of Prospective Adult Members and Comparison to the Age of the General Population

Membership Category

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

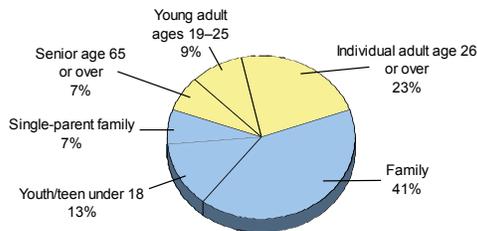
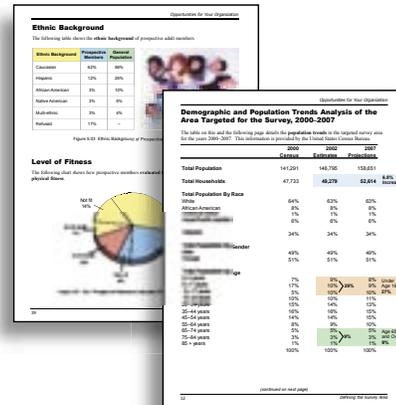


Figure 5.02 Membership Categories Preferred by Prospective Members

Demographics

With a clear understanding of who is looking for a YMCA, you don't have to take a shotgun approach to finding members.



Census Tract Locations

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

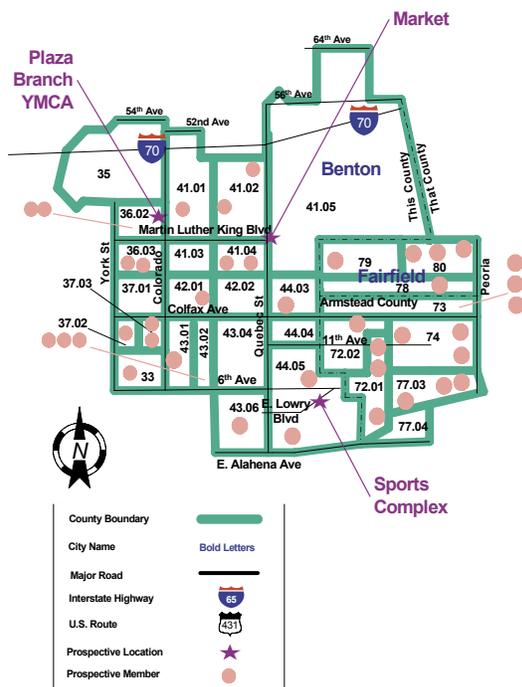
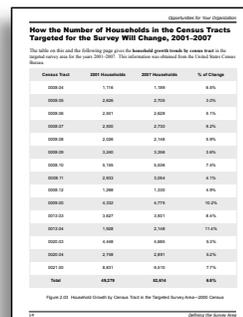


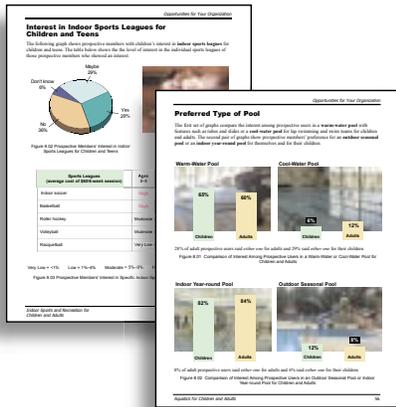
Figure 5.05 Census Tract Locations of Prospective Members

So that you can use promotional dollars more efficiently, a FourSquare Market Study provides comprehensive demographics, and using census tracts, shows you where prospective members live.



Children's Programs

A FourSquare Market Study shows you how to best serve families with children. You see the level of demand for a variety of traditional and contemporary children's programs.



Aquatic facilities are the most expensive features to build. A FourSquare Market Study shows you the level of interest in cool- and warm-water activities, so you can decide what type and size pool to build.

A FourSquare Market Study also helps you see the level of demand for an outdoor playing field or a gymnasium, along with data that shows how to best program each facility.

Interest in Child Care Programs

The following table shows the level of interest in child care programs of prospective members with children under 18 in the household.

Child Care Programs*	Ages 0-2	Ages 3-5	Ages 6-9	Ages 10-13
Baby-sitting while parents work out	Moderate	High		
Social and exercise program for stay-at-home moms	Low	Low	Low	Very Low
Kids' gym with supervised features such as moonwalks and a climbing maze		High	Very High	Low
Parents' Night Out fun program for children at about \$20/child		Moderate	Moderate	Low
Licensed before- and after-school program at the YMCA at \$100/week		Low	High	Moderate
Full-day care on school holidays at \$17/day		Low	Moderate	Moderate
Full-day licensed preschool child care at \$115/week		Moderate		
Twice-a-week fun and sports club at \$10/day			High	Low

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

*Full-day licensed infant care at about \$175/week was also tested and received insignificant interest.

Figure 6.01 Prospective Members' Interest in Child Care Programs

When given a choice between two locations for a preschool, 60% of parents of prospective child care participants with a great deal of interest in preschool said they preferred the Memorial Park location, 30% said Sports Complex, and 10% said either.

Interest in Participation in Aquatic Programs for Children and Teens

The following table shows interest among prospective users in aquatic programs for children and teens.

Aquatic Programs	Ages Infant-2	Ages 3-5	Ages 6-9	Ages 10-13	Ages 14-17
Parent and infant swim classes at about \$40/10 classes	Moderate				
Recreational swimming		High	Very High	Very High	Very High
Swim lessons at about \$40/4 classes		Moderate	Very High	Moderate	Very Low
Supervised sports such as water polo at about \$50/10 classes			Low	High	Moderate
Swim teams at \$180/season (3 months)			Very Low	Moderate	Low
Lifeguard training at \$100/certification				Very Low	Low

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

Figure 8.03 Prospective Users' Interest in Aquatic Programs for Children and Teens



Interest in Fitness and Recreation Activities for Older Children and Teens

The following table shows the interest older children and teens had in fitness and recreation activities.

Fitness and Recreation Activities	Ages 10-13	Ages 14-17
Social activities such as:		
• teen nights with movies, food, and dancing	Very High	High
• a teen center with TV, pool tables, and teen nights	High	High
Recreational activities such as:		
• hip hop, breakdancing, and dee-jaying	Moderate	High
• a radio station run by teens	High	Moderate
• a stage for theater and bands	Moderate	Low
Fitness activities such as:		
• teen fitness center where teens learn weight training techniques	High	High
• yoga and kickboxing	High	High

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

Figure 11.01 Older Children and Teens' Interest in Fitness and Recreation Activities for Older Children and Teens

Interest in Educational and Job Training Programs for Teens

The graph to the right shows the interest prospective members with children had in educational and job training programs for teens such as computer skills, job search techniques, and leadership development programs.

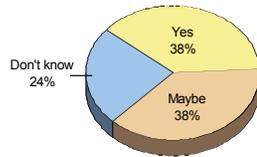


Figure 11.02 Prospective Members with Children's Interest in Educational and Job Training for Teens

Serving older children and teens is part of the core mission for most YMCAs. A FourSquare Market Study gives you the information you need to understand and serve this consumer group.

Interest in Fitness Activities for Adults

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

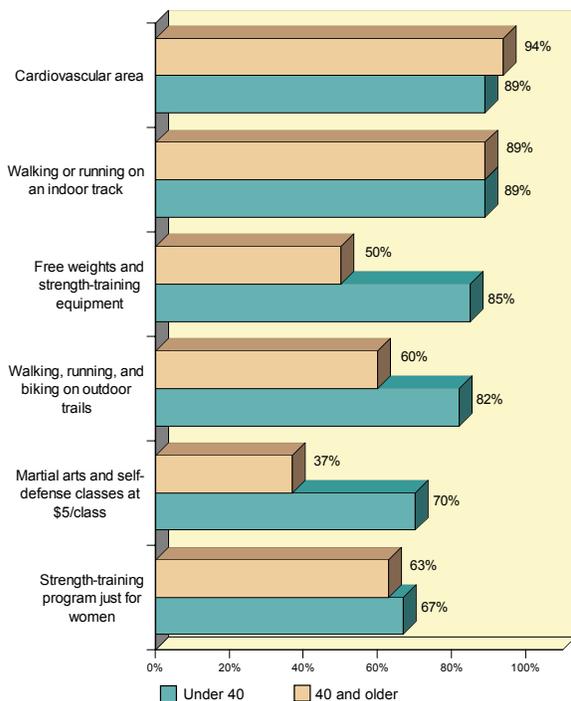


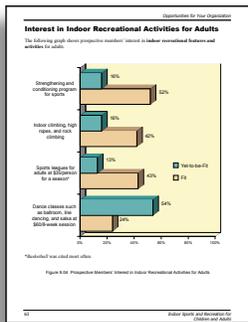
Figure 7.01 Prospective Members' Interest in Fitness Activities for Adults

Adult Programs

As the nation grows older, the differences in program interests and service approaches between younger and older prospective members becomes more dramatic.

Whether people perceive themselves as fit or yet-to-be-fit helps determine their interest level in various health and wellness programs.

A FourSquare Market Study helps you develop the right mix of programs for members of each group.



Recommendations

A FourSquare Market Study can provide guidelines for designing your facility, as well as estimates of construction costs.

These pages are typical of what you would see in a 50-plus page FourSquare Market Study.

The team at FourSquare Research has visited more YMCAs and other providers of similar services than any marketing research firm in the U.S.A. This experience and expertise coupled with the study's findings will guide your architect in building your YMCA for the future.

Interest in Health and Wellness Programs and Personal Service Programs for Adults

The following graph shows prospective members' interest in health and wellness and personal service programs for adults. Most health and wellness programs could be offered in partnership with a hospital.

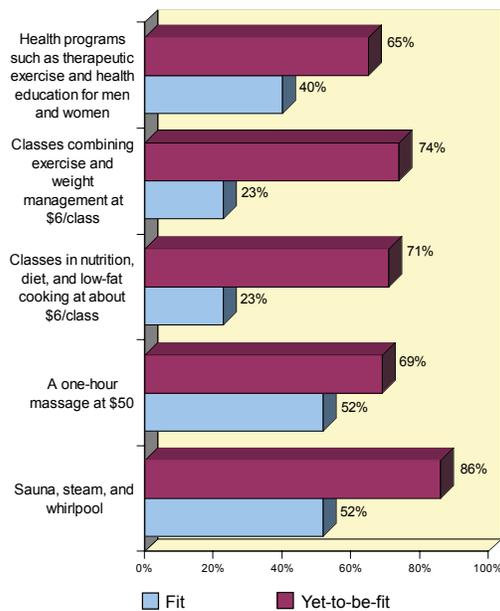
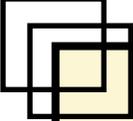


Figure 7.03 Prospective Members' Interest in Health and Wellness and Personal Service Programs for Adults

Recommended Indoor Features for A New YMCA	Approximate Square Footage
State-of-the-art fitness center that includes <ul style="list-style-type: none"> a cardiovascular area a muscle strengthening area a free weights area a workout area for beginners/women 	5,000
Indoor warm-water pool for recreational swimming and therapeutic exercise with water playground features (includes showers, changing areas, and lockers)	10,000
Aerobics/multipurpose exercise studio for aerobics	1,500
Multipurpose exercise studio/program center with high ceilings for gymnastics, dance, and overflow aerobic classes	1,500
Child watch/baby-sitting area for young children ages infant-2	1,000
Kids' indoor playground for older children ages 3-13	2,000
Members' lounge that includes <ul style="list-style-type: none"> a teaching kitchen for cooking classes and healthy cooking demonstrations snack area with coffees and healthy food lounge area with tables and chairs 	2,500
Subtotal	23,500
Minimal planning factor, H/V/AC, halls, and offices (20%)	4,700
Total New Indoor Space	28,200
Recommended Adaptive Reuse of the Existing Building	
Fitness and recreation center for youth and teens that includes <ul style="list-style-type: none"> a recreation room with TV, computers, and pool tables a fitness center with cardiovascular and strength-training equipment appropriate for teens a multipurpose room for band practice, theatre lessons, and a variety of teen programs 	5,000
Minimal planning factor, H/V/AC, halls, and offices (20%)	1,000
Total Existing Indoor Space	6,000
Grand Total	34,200
Recommended Outdoor Features	
Tropical gymnasium (covered but with open air) for basketball, indoor soccer, and volleyball plus a climbing wall for indoor climbing	7,000
Outdoor skate park	half acre
Outdoor ball fields for baseball and soccer	4-6 acres
Recommended Phase II Features	
Enclose the tropical gym or build a new indoor multipurpose gymnasium	

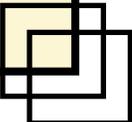
Figure 13.01 Recommended Space Allocation for A New YMCA



*FourSquare \ adj. \ marked by
boldness and conviction: forthright:
free from ambiguity and evasiveness:
straight to the point*

*Every FourSquare Market Study is
rich in valuable data.*

*Scientific research plus clear
analysis equals recommendations
that work.*



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