Municipality of South Huron

Market Research Study

Final Report

LeisurePlan International Inc.

Municipality of South Huron

Market Research Study
Final Report

October 2018

LeisurePlan International Inc.
450 Kingston Road, Suite 100
Toronto, Ontario M4L 1V3
416-703-8670

CONTENTS PAGE

1.0 INTRODUCTION

The Municipality of South Huron retained LeisurePlan International Inc. in 2018 to undertake market research to determine the order of magnitude and characteristics of the potential market for adult and family membership and participation associated with a proposed multi-purpose community recreation centre under consideration in South Huron, which may be operated by the YMCAs Across Southwestern Ontario. The research focussed on the target market segment of adults between 20-64 years of age residing in the Market Area corresponding to the municipal boundaries of South Huron.

The research addressed the following topics among the market segment of adults between 20-64 years of age:

- Opinions regarding participation in indoor pool and fitness activities, and indoor pool and fitness environments.
- A profile of current participation in recreation, fitness, and aquatic activities similar to those to be provided in the proposed new facility.
- Current membership at health and fitness facilities and the main reason for not currently being a member of a health and fitness facility.
- The level of awareness of the YMCAs Across Southwestern Ontario.
- The likelihood of purchasing an adult or family membership at the proposed multi-purpose community centre.
- The impact of selected monthly membership fees on the likelihood of purchasing an adult or family membership at the proposed new facility.
- The preference between purchasing an adult or family membership to access the proposed new facility.
- The perceived convenience of the proposed location for the facility (i.e. Exeter).
- The level of importance of pre-selected factors to the likelihood of purchasing an adult or family membership at the proposed new facility.
- The likelihood of participating in selected activities as a member at the proposed new facility.

This report presents the results of the research.

2.0 THE SURVEY RESEARCH METHODOLOGY

The research focused on the identification and analysis of the behaviour, opinions, perceptions and preferences of adults between the ages of 20-64 residing in the Municipality of South Huron concerning their current participation in a range of recreational, fitness and aquatic activities and their potential interest in membership and participation at the proposed multi-purpose community recreation centre.

2.1 Sample Stratification

The research was conducted based on a randomly selected and statistically representative sample of the target market segment of adults between 20-64 years of age residing in the Market Area corresponding to the municipal boundaries of the Municipality of South Huron. Previous research has shown that participation in these types of activities and preferences for service provision may vary based on an adult's age and gender. As a result the sample was stratified based on gender and two age groups, 20-39 years of age and 40-64 years of age, to allow for the analysis of the survey findings based on these characteristics.

These parameters and the sampling stratification strategy established the total number of completed questionnaires required to derive a statistically valid and representative survey for respondents *in total* and by *age group* and *gender* for the Market Area. A total of 254 completed questionnaires were required for analysis of the survey results based on respondents *in total* and respondents' *age group* and *gender*. The result was a statistically valid and representative sample of adults 20-64 years of age at a 95% confidence level and a 7% margin of error.

The sample size and stratification (total number of completed questionnaires required for each age group and gender) is shown in Table 2.1.

Table 2.1: Sample Stratification

Age Group	Gender	2016 Population*	# of Completed Questionnaires Required
20-39	Males	1,045	49
	Females	965	45
40-64	Males	1,655	78
	Females	1,740	82
Total		**5,405**	**254**

* Source: Statistics Canada 2016 Census

The sample size and stratification utilized in the research ensured the following statistical parameters associated with “confidence level” and “margin of error” for this survey research methodology and the survey results:

- The survey results for **total respondents in the Market Area** have a “margin of error” of 7%, which means that if the survey were repeated 20 times, 19 out of 20 times the difference between the responses of the survey sample and the responses of all residents 20-64 years of age in the Market Area, had they all been surveyed, would lie within a range of +/- 3.5%. For example, a survey finding of 50% can be interpreted as having a value between 46.5% and 53.5%.

- The survey results based on **respondents’ age group** have a “margin of error” of 10%, which means that if the survey were repeated 20 times, 19 out of 20 times the difference between the responses of the survey sample 20-39 years of age and 40-64 years of age and the responses of all residents 20-39 years of age and 40-64 years of age in the Market Area, had they all been surveyed, would lie within a range of +/- 5%.

- The survey results based on **respondents’ gender** have a “margin of error” of 10%, which means that if the survey were repeated 20 times, 19 out of 20 times the difference between the responses of the survey sample comprised of males and females and the responses of all male and female residents in the Market Area, had they all been surveyed, would lie within a range of +/- 5%.

2.2 Sample Selection

The sample (i.e. the telephone numbers) was obtained from an authorized list management company.

Each randomly selected telephone number was called at least three times during the survey period in order to complete an interview before discarding the telephone number if there was no answer.

2.3 Types of Analysis

The data for the Market Area was analyzed based on:

- Total respondents
- Respondents’ age group (20-39 and 40-64)
- Respondents’ gender

The findings of the analysis of the responses of total respondents are reported. Any variations in the results based on respondents' age group or gender are reported.

The findings are presented based on:

- The proportion of the total number of respondents surveyed (where "n"=254)[1]
- The proportion of the total number of responses (where "n" varies)

It should be noted that generally, only statistically significant responses are recorded, and therefore the columns and/or rows within some tables will not always total 100%.

2.4 Terminology and Definitions

The following terms are used in this report:

"(n=)"	–	The number of respondents surveyed or the number of respondents to a particular question.
"respondent"	–	The individual surveyed.
"margin of error"	–	The variation between the responses of the survey sample and the responses of all adult residents 20-64 years of age residing in the Market Area had they all been surveyed.
"confidence level"	–	The level of certainty that the variation between the responses of the survey sample and the responses of all adult residents of the Market Area 20-64 years of age had they all been surveyed does not exceed the margin of error.
"statistically significant"	–	The difference between responses is significant if the difference exceeds the margin of error.
"market area"	–	The geographic area comprised of the municipal boundaries of the Municipality of South Huron.

[1] A statistically valid and representative sample of adults 20-64 years of age at a 95% confidence level and a 7% margin of error in the Market Area.

3.0 SUMMARY OF THE SURVEY RESULTS

3.1 Opinions Concerning Participation in Indoor Pool and Fitness Activities and Indoor Pool and Fitness Environments

Respondents were asked whether they "agreed" or "disagreed" with a number of statements concerning their participation in indoor pool and fitness activities, and indoor pool and fitness environments.

A. Findings – Total Respondents

Table 3.1 summarizes the responses concerning participation in indoor pool and fitness activities and indoor pool and fitness environments.

Table 3.1: Opinions Concerning Participation in Indoor Pool and Fitness Activities and Indoor Pool and Fitness Environments – Total Respondents

Statement	% of Total Respondents (n=254)	
	Agree	Disagree
I enjoy the activity of swimming	87.2	12.8
I might feel intimidated in an indoor pool and fitness environment	25.3	74.7
I would feel more comfortable at an indoor pool and fitness facility if I were in better shape	37.7	62.3
I would be more likely to participate in indoor aquatic and fitness activities with a friend or partner than on my own	56.8	43.2
I would be more likely to participate in indoor aquatic and fitness activities in a group setting with other people rather than on my own	58.4	41.6
I would prefer to participate in indoor aquatic and fitness activities with members of my own gender	42.8	57.2

- The majority of respondents (87.2%) *agreed* with the statement "I enjoy the activity of swimming"; 12.8% *disagreed*.

- 25.3% of respondents *agreed* with the statement "I might feel intimidated in an indoor pool and fitness environment"; the majority of respondents (74.7%) *disagreed*.

- 37.7% of respondents *agreed* with the statement "I would feel more comfortable at an indoor pool and fitness facility if I were in better shape"; the majority (62.3%) *disagreed*.

- 56.8% of respondents *agreed* with the statement "I would be more likely to participate in indoor aquatic and fitness activities with a friend or partner than on my own"; 43.2% *disagreed*.

- 58.4% of respondents *agreed* with the statement "I would be more likely to participate in indoor aquatic and fitness activities in a group setting with other people rather than on my own"; 41.6% *disagreed*.

- 42.8% of respondents *agreed* with the statement "I would prefer to participate in fitness activities with members of my own gender"; 57.2% *disagreed*.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings for three statements varied based on gender:

- A larger proportion of female respondents *agreed* with the statement "I would feel more comfortable at an indoor pool and fitness facility if I were in better shape" (41.1% of female respondents), compared to male respondents (29.1%).

- A larger proportion of female respondents *agreed* with the statement "I would be more likely to participate in health and fitness activities in a group setting with other people rather than on my own" (66.9% of female respondents), compared to male respondents (39.2%).

- A larger proportion of female respondents *agreed* with the statement "I would prefer to participate in fitness activities with members of my own gender" (50.3% of female respondents), compared to male respondents (26.6%).

3.2 Current Participation in Selected Programs and Activities

Respondents were asked whether they participated in selected recreation, fitness and aquatic activities (activities similar to those to be provided at the proposed multi-purpose community recreation centre) at least once each month in the past year. A number of follow-up questions were asked of respondents to profile the nature of their participation (e.g. the provider through which they participated most often and the basis by which they participated).

3.2.1 Participation in Selected Recreation, Fitness and Aquatic Activities

A. Findings – Total Respondents

Table 3.2 summarizes participation in the selected activities.

Table 3.2: Participation in Selected Recreation, Fitness and Aquatic Activities – Total Respondents

Activity	% of Total Respondents (n=254)	
	Participated At Least Once/Month	**Did Not Participate At Least Once/Month**
The use of cardiovascular conditioning equipment	36.6	63.4
The use of weights or weight machines	30.7	69.3
Recreational swimming indoors	24.4	75.6
Walking or running for fitness indoors, not on a treadmill	23.6	76.4
Any type of group fitness class	21.3	78.7
Swim lessons or stroke improvement indoors	17.7	82.3
Gymnasium sports	13.4	86.6
Aquatic fitness classes indoors	10.6	89.4
Water therapy or aquatic rehab indoors	--	94.5

-- The proportion of responses was not statistically significant

- 36.6% of respondents participated in *the use of cardiovascular conditioning equipment* at least once a month.

- 30.7% of respondents participated in *the use of weights or weight machines* at least once a month.

- 24.4% of respondents participated in *recreational swimming indoors* at least once a month.
- 23.6% of respondents participated in *walking or running for fitness indoors, not on a treadmill* at least once a month.
- 21.3% of respondents participated in *any type of group fitness class* at least once a month.
- 17.7% of respondents participated in *swim lessons or stroke improvement indoors* at least once a month.
- 13.4% of respondents participated in *gymnasium sports* at least once a month.
- 10.6% of respondents participated in *aquatic fitness classes indoors* at least once a month.
- The proportion of respondents that participated in *water therapy or aquatic rehab indoors* at least once a month was not statistically significant.

B. Findings – By Age Group

The findings for four activities varied based on age group:

- A larger proportion of respondents in the 20-39 year age group participated in *the use of weights or weight machines* (42.9% of respondents in the 20-39 year age group), compared to respondents in the 40-64 year age group (28.8%).
- A larger proportion of respondents in the 20-39 year age group participated in *any type of group fitness class* (34.3% of respondents in the 20-39 year age group), compared to respondents in the 40-64 year age group (19.2%).
- A larger proportion of respondents in the 20-39 year age group participated in *recreational swimming indoors* (37.1% of respondents in the 20-39 year age group), compared to respondents in the 40-64 year age group (22.4%).
- A larger proportion of respondents in the 20-39 year age group participated in *swim lessons or stroke improvement indoors* (31.4% of respondents in the 20-39 year age group), compared to respondents in the 40-64 year age group (15.5%).

C. Findings – By Gender

The findings did not vary based on gender.

3.2.2 Provider Through Which They Participated Most Often

Respondents that indicated they participated in one or more of the selected activities (see Section 3.2.1) were asked to identify the provider through which they participated most often (i.e. home, a Municipality, a YMCA, a health and fitness facility other than a YMCA, a school/college/university, or a community group/church).

A. Findings – Respondents Who Participated

Table 3.3 summarizes the providers through which respondents participated in the selected activities.

Table 3.3: Providers of Selected Fitness, Recreation and Aquatic Activities – Respondents Who Participated

Activity	Provider (% of Respondents That Participated)						
	At home	Munici-pality	YMCA	Health and Fitness Facility	School/ college/ university	Community Group/ Church	Other
The use of cardiovascular conditioning equipment (n=93)	54.8	--	--	25.8	--	--	--
The use of weights or weight machines (n=78)	56.4	--	--	25.6	--	--	--
Recreational swimming indoors (n=62)	16.1	16.1	14.5	21.0	--	--	17.7
Walking or running for fitness indoors, not on a treadmill (n=60)	33.3	--	11.7	15.0	--	--	20.0
Any type of group fitness class (n=54)	14.8		11.1	33.3		20.4	
Swim lessons or stroke improvement indoors (n=45)	--	17.8	15.6	13.3	--	--	31.1
Gymnasium sports (n=34)	20.6	20.6	--	17.6	20.6	17.6	
Aquatic fitness classes indoors (n=27)	--	14.8	11.1	25.9	--	11.1	22.2

-- The proportion of responses was not statistically significant.

- The largest proportion of respondents that participated in *the use of cardiovascular conditioning equipment* participated *at home* (54.8% of respondents who participated in *the use of cardiovascular conditioning equipment*), followed by *a health and fitness facility* (25.8%).

- The largest proportion of respondents that participated in *the use of weights or weight machines* participated *at home* (56.4% of respondents who participated in *the use of weights or weight machines*), followed by *a health and fitness facility* (25.6%).

- The largest proportion of respondents that participated in *recreational swimming indoors* participated at *a health and fitness facility* (21.0% of respondents who participated in *recreational swimming indoors*), *"other"* (17.7%), *at home* (16.1%), *a municipality* (16.1%) and *a YMCA* (14.5%).

- The largest proportion of respondents that participated in *walking or running for fitness on an indoor track (not on a treadmill)* participated *at home* (33.3% of respondents who participated in *walking or running indoors, not on a treadmill*, followed by "*other*" (20.0%), *a health and fitness facility* (15.0%) and a YMCA (11.7%).

- The largest proportion of respondents that participated in *any type of group fitness class* participated at *a health and fitness facility* (33.3% of respondents who participated in *any type of group fitness class*), followed by *a community group/church* (20.4%), *at home* (14.8%) and *a YMCA* (11.1%).

- The largest proportion of respondents that participated in *swim lessons or stroke improvement indoors* participated through some "other" provider (31.1% of respondents who participated in *swim lessons or stroke improvement indoors*), followed by *a municipality* (17.8%), *a YMCA* (15.6%) and *a health and fitness facility* (13.3%).

- The largest proportion of respondents that participated in *gymnasium sports* participated *at home* (20.6% of respondents who participated in *gymnasium sports*), *a municipality* (20.6%), *a school/college/university* (20.6%), *a community group/church* (17.6%) and *a health and fitness facility* (17.6%).

- The largest proportion of respondents that participated in *aquatic fitness classes indoors* participated at *a health and fitness facility* (25.9% of respondents who participated in *aquatic fitness classes indoors*), *"other"* (22.2%), *a municipality* (14.8%), *a community group/church* (11.1%) and *a YMCA* (11.1%).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.2.3 Basis of Participation in Selected Activities

Respondents that indicated they participated in one or more of the selected activities (see Section 3.2.1) were asked whether they purchased a membership to participate or whether they participated on a pay-per-program basis or at no cost/free. It should be noted that the responses are typically a reflection of the type of provider through which they participated (see previous Section).

A. Findings – Respondents Who Participated

Table 3.4 summarizes the basis of participation in the selected activities.

Table 3.4: Basis of Participation in Selected Fitness, Recreation and Aquatic Activities – Respondents Who Participated

Activity	% of Respondents That Participated		
	Membership	Pay-Per-Program	No Cost/Free
The use of cardiovascular conditioning equipment (n=93)	33.3	--	59.1
The use of weights or weight machines (n=78)	37.2	--	55.1
Recreational swimming indoors (n=62)	27.4	41.9	30.6
Walking or running for fitness indoors, not on a treadmill (n=60)	23.3	--	71.7
Any type of group fitness class (n=54)	33.3	35.2	31.5
Swim lessons or stroke improvement indoors (n=45)	28.9	46.7	24.4
Gymnasium sports (n=34)	26.5	29.4	44.1
Aquatic fitness classes indoors (n=27)	29.6	48.1	22.2

-- The proportion of responses was not statistically significant.

- The largest proportion of respondents that participated in *the use of cardiovascular conditioning equipment* participated at *no cost/free* (59.1% of respondents that participated in *the use of cardiovascular conditioning equipment*), followed by the purchase of *a membership* (33.3%).

- The largest proportion of respondents that participated in *the use of weights or weight machines* participated at *no cost/free* (55.1% of respondents that participated in *the use of weights or weight machines*), followed by the purchase of *a membership* (37.2%).

- The largest proportion of respondents that participated in *recreational swimming indoors* participated on a *pay-per-program* basis (41.9% of respondents that participated in *recreational swimming indoors*), followed by *at no cost/free* (30.6%) and the purchase of *a membership* (27.4%).

- The majority of respondents that participated in *walking or running for fitness indoors, not on a treadmill* participated at *no cost/free* (71.7% of respondents that participated in *walking or running indoors, not on a treadmill*) , followed by the purchase of *a membership* (23.3%).

- The largest proportion of respondents that participated in *any type of group fitness class* participated on a *pay-per-program* basis (35.2% of respondents that participated in *any type of group fitness class*), through the purchase of *a membership* (33.3%) and *at no cost/free* (31.5%).

- The largest proportion of respondents that participated in *swim lessons or stroke improvement indoors* participated on a *pay-per-program* basis (46.7% of respondents that participated in *swim lessons or stroke improvement indoors*), followed by the purchase of *a membership* (28.9%) and *at no cost/free* (24.4%).

- The largest proportion of respondents that participated in *gymnasium sports* participated *at no cost/free* (44.1% of respondents that participated in *gymnasium sports*), followed by on a *pay-per-program* basis (29.4%) and the purchase of *a membership* (26.5%).

- The largest proportion of respondents that participated in *aquatic fitness classes indoors* participated on a *pay-per-program* basis (48.1% of respondents that participated in *aquatic fitness classes indoors*), followed by the purchase of *a membership* (29.6%) and *at no cost/free* (22.2%).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.3 Membership in a Health and Fitness Facility

Respondents were asked whether they are currently a member of a health and fitness facility. Respondents that are currently a member of a health and fitness facility were asked to identify whether it is located in South Huron or outside the municipality, whether it is a YMCA, and whether they participated in aquatic activities as part of their membership. Respondents that are **not** currently a member of a health and fitness facility were asked to identify the main reason why they are not currently a member.

3.3.1 Current Membership in a Health and Fitness Facility

A. Findings – Total Respondents

15.0% of total respondents indicated that they are *currently* a member of a health and fitness facility (Table 3.5).

Table 3.5: Current Member of a Health and Fitness Facility – Total Respondents

Current Member	% of Total Respondents (n=254)
Yes	15.0
No	85.0

Table 3.6 summarizes the location of the health and fitness facility at which respondents are currently a member.

Table 3.6: Location of Health and Fitness Facility – Respondents Who Are Currently a Member of a Health and Fitness Facility

Location	% of Respondents Currently a Member (n=38)
In South Huron	44.7
Outside South Huron	55.3

- 44.7% of respondents that are members of a health and fitness facility are members of a facility located in South Huron; 55.3% are members of a facility located outside the municipality.

Table 3.7 summarizes whether the health and fitness facility at which respondents are currently a member is a YMCA.

Table 3.7: Membership at a YMCA – Respondents Who Are Currently a Member of a Health and Fitness Facility

Membership at a YMCA	% of Respondents Currently a Member (n=38)
Yes	28.9
No	71.1

- 28.9% of respondents that are members of a health and fitness facility are members of a YMCA.

Table 3.8 summarizes participation in aquatic activities among respondents that are currently a member of a health and fitness facility.

Table 3.8: Participation in Aquatic Activities – Respondents Who Are Currently a Member of a Health and Fitness Facility

Participation in Aquatic Activities	% of Respondents Currently a Member (n=38)
Yes	28.9
No	71.1

- 28.9% of respondents that are members of a health and fitness facility participated in aquatic activities as part of their membership; the majority did not participate in aquatic activities (71.1% of respondents that are currently a member of a health and fitness facility).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.3.2 Main Reason Not Currently a Member of a Health and Fitness Facility

A. Findings – Total Respondents Not Currently a Member of a Health and Fitness Facility

85% of total respondents are **not** currently a member of a health and fitness facility (see previous Section). Table 3.9 summarizes respondents' main reason for not currently being a member of a health and fitness facility.

Table 3.9: Main Reason for Not Currently Being a Member of a Health and Fitness Facility – Respondents Not Currently a Member

Main Reason	% of Respondents Not Currently a Member (n=216)
No time	23.1
Facilities are too far away	21.8
Cost	14.8
No interest	13.9

- The reasons identified by the largest proportion of respondents as the main reason for not currently being a member of a health and fitness facility were *no time* (23.1% of respondents that are not currently a member of a health and fitness facility), *facilities are too far away* (21.8%), *cost* (14.8%) and *no interest* (13.9%).
- A variety of other reasons were identified however, the proportion of respondents that identified each was not statistically significant.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.4 Level of Awareness of the YMCAs Across Southwestern Ontario

Respondents were asked to identify their level of awareness of the YMCAs Across Southwestern Ontario and the programs and services they provide; respondents were asked if they were "very aware", "somewhat aware", "not very aware", or "not at all aware".

A. Findings – Total Respondents

Table 3.10 summarizes the perceived level of awareness of the YMCAs Across Southwestern Ontario.

Table 3.10: Level of Awareness of the YMCAs Across Southwestern Ontario – Total Respondents

Reason	% of Total Respondents (n=254)
Very aware	22.4
Somewhat aware	42.1
Not very aware	20.5
Not at all aware	15.0

- The largest proportion of respondents (42.1%) indicated that they are *somewhat aware* of the YMCAs Across Southwestern Ontario and the programs and services they provide.

- 22.4% of respondents indicated that they are *very aware* of the YMCAs Across Southwestern Ontario and the programs and services they provide.

- 20.5% of respondents indicated that they are *not very aware* of the YMCAs Across Southwestern Ontario and the programs and services they provide.

- 15.0% of respondents indicated that they are *not at all aware* of the YMCAs Across Southwestern Ontario and the programs and services they provide.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.5 Likelihood of Adult Membership at the Proposed Multi-Purpose Community Recreation Centre

3.5.1 Likelihood of Adult Membership at the Proposed Multi-Purpose Community Recreation Centre

Respondents were asked how likely it was that they would purchase an adult membership at the proposed multi-purpose community recreation centre (respondents were asked if they were “very likely”, “somewhat likely”, “not very likely”, or “not at all likely”) assuming the following:

- A new facility containing an indoor aquatic centre with lap lanes and leisure pool, a gymnasium, a fitness conditioning centre, an indoor walking track and multi-purpose rooms.
- The provision of a wide variety of aquatic, fitness and recreation programs to residents of all ages and families.
- Access to all of the facility’s aquatic, fitness, health and recreation programs and facilities.
- The price of membership would be “reasonable”.
- The facility to be located in Exeter.

A. Findings – Total Respondents

Table 3.11 summarizes respondents’ opinions of the likelihood that they would purchase an adult membership at the proposed multi-purpose community recreation centre. It should be noted that this was prior to the introduction of membership fees and the ability to purchase a family membership.

Table 3.11: Likelihood of Purchasing an Adult Membership at the Proposed Multi-Purpose Community Recreation Centre – Total Respondents

Likelihood	% of Total Respondents (n=254)
Very likely	43.7
Somewhat likely	23.2
Not very likely	14.2
Not at all likely	18.9

- 43.7% of respondents indicated that it is *very likely* that they will purchase an adult membership. 18% of respondents that indicated it is *very likely* that they will purchase an adult membership are currently a member of a health and fitness facility; 45% of these respondents are a member of a facility in South Huron, 25% are a member of a YMCA, and 35% participate in aquatic activities as part of their membership.

- 23.2% of respondents indicated that it is *somewhat likely* that they will purchase an adult membership. 17% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *somewhat likely* that they will purchase an adult membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership**.**

- 14.2% of respondents indicated that it is *not very likely* that they will purchase an adult membership. 8% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *not very likely* that they will purchase an adult membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership**.**

- 18.9% of respondents indicated that it is *not at all likely* that they will purchase an adult membership. 10% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *not at all likely* that they will purchase an adult membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership**.**

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings varied based on gender:

- A larger proportion of female respondents indicated that it is *very likely* they will purchase an adult membership (50.3% of female respondents), compared to male respondents (29.1%).

3.5.2 Reason for Not Being a Member at the Proposed Multi-Purpose Community Recreation Centre

Respondents that indicated it was *not very likely* or *not at all likely* that they would purchase an adult membership at the proposed multi-purpose community recreation centre (see previous Section) were asked to identify the main reason.

A. Findings – Respondents Not Likely to be a Member of the Proposed Multi-Purpose Community Recreation Centre

33.1% of respondents indicated that they are *not very likely* or *not at all likely* to purchase an adult membership at the proposed multi-purpose community recreation centre (see previous Section). Table 3.12 summarizes respondents' reasons for being *not very likely* or *not at all likely* to purchase an adult membership at the proposed new facility.

Table 3.12: Reason for Being *Not Very Likely* or *Not at All Likely* to Purchase Adult Membership at the Proposed New Multi-Purpose Community Recreation Centre – Respondents *Not Very Likely* or *Not At All Likely* to Purchase Adult Membership

Reason	% of Respondents Not Likely to Purchase Membership (n=84)
Exeter is too far away	31.0
No time	15.5
The community can't afford to provide this facility	13.1
No interest	10.7

- *"Exeter is too far away"* was the reason identified by the largest proportion of respondents *not very likely* or *not at all likely* to purchase an adult membership (31.0% of respondents *not very likely* or *not at all likely* to purchase an adult membership), followed by *no time* (15.5%), *"the community can't afford to provide this facility"* (13.1%) and *no interest* (10.7%).

- A variety of "other" reasons were identified, however, the proportion of respondents that identified each was not statistically significant.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.6 Effect of Fee on the Likelihood of Purchasing an Adult Membership

Respondents were asked whether they would consider purchasing an adult membership at the proposed multi-purpose community recreation centre at two pre-determined price levels: $54/month and $52/month. The question was worded such that respondents were asked about the fee of $54/month first, and if they responded negatively, they were asked if they would purchase at a lower fee of $52/month.

The results are shown based on whether respondents had previously indicated they were *very likely* or *somewhat likely* to purchase an adult membership at the proposed multi-purpose community recreation centre (see Section 3.5.1).

3.6.1 Effect of Fee on Respondents Very Likely to Purchase an Adult Membership

A. Findings – Respondents Very Likely to Purchase an Adult Membership

Table 3.13 summarizes the effect of the introduction of the monthly fees on potential future adult membership among respondents *very likely* to purchase an adult membership.

Table 3.13: The Impact of Potential Monthly Membership Fees on Respondents *Very Likely* to Purchase an Adult Membership

	A	B
Monthly Membership Fees	**% of Respondents *Very Likely* to Purchase Adult Membership (n=111)**	**% of Total Respondents (n=254)**
$54	74.8	32.7
$52	76.6	33.5

- 43.7% of total respondents indicated that they were *very likely* to purchase an adult membership at the proposed multi-purpose community recreation centre prior to the consideration of membership fee (see Section 3.5.1). The introduction of the monthly membership fees had a statistically significant negative impact on the proportion of respondents *very likely* to purchase an adult membership:
  - The proportion of respondents *very likel*y to purchase an adult membership at the proposed multi-purpose community recreation centre decreased 25.2% at the higher fee tested of $54/month (Column A).

- The proportion of respondents *very likel*y to purchase an adult membership at the proposed multi-purpose community recreation centre decreased 23.4% at the lower fee tested of $52/month (Column A).

- A reduction in the monthly fee from the higher fee tested did not increase the proportion of total respondents *very likely* to purchase an adult membership a statistically significant amount. Expressed as a percentage of total respondents, 32.7% of total respondents indicated that they were *very likely* to purchase an adult membership and would pay the higher fee of $54/month (Column B). The proportion of total respondents that indicated they were *very likely* to purchase an adult membership increased from 32.7% to 33.5% with the introduction of the lower fee of $52/month (Column B). This represents a difference of 0.8% of total respondents, which is less than the margin of error of the research of 7%.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.6.2 Effect of Fee on Respondents Somewhat Likely to Purchase an Adult Membership

A. Findings – Respondents Somewhat Likely to Purchase an Adult Membership

Table 3.14 summarizes the effect of the introduction of the monthly fees on potential future adult membership among respondents *somewhat likely* to purchase an adult membership.

Table 3.14: The Impact of Potential Monthly Membership Fees on Respondents *Somewhat Likely* to Purchase an Adult Membership

	A	B
Monthly Membership Fees	**% of Respondents *Somewhat Likely* to Purchase Adult Membership (n=59)**	**% of Total Respondents (n=254)**
$54	57.6	13.4
$52	59.3	13.8

- 23.2% of total respondents indicated that they were *somewhat likely* to purchase an adult membership at the proposed multi-purpose community recreation centre prior to the consideration of membership fee (see Section 3.5.1). The introduction of the monthly membership fees had a statistically significant negative impact on the proportion of respondents *somewhat likely* to purchase an adult membership:

  - The proportion of respondents *somewhat likel*y to purchase an adult membership at the proposed multi-purpose community recreation centre decreased 42.4% at the higher fee tested of $54/month (Column A).

  - The proportion of respondents *somewhat likel*y to purchase an adult membership at the proposed multi-purpose community recreation centre decreased 40.7% at the lower fee tested of $52/month (Column A).

- A reduction in the monthly fee from the higher fee tested did not increase the proportion of respondents *somewhat likely* to purchase an adult membership a statistically significant amount. Expressed as a percentage of total respondents, 13.4% of total respondents indicated that they were *somewhat likely* to purchase an adult membership and would pay the higher fee of $54/month (Column B). The proportion of total respondents that indicated they were *somewhat likely* to purchase an adult membership increased from 13.4% to 13.8% with the introduction of the lower fee of $52/month (Column B). This represents a difference of 0.4% of total respondents, which is less than the margin of error of the research of 7%.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.7 Likelihood of Family Membership at the Proposed Multi-Purpose Community Recreation Centre

Respondents were asked how likely it was that they would purchase a family membership at the proposed multi-purpose community recreation centre (respondents were asked if they were “very likely”, “somewhat likely”, “not very likely”, or “not at all likely”) assuming the following:

- For one fee 2 adults and any family members under 18 years of age living at the same address may access the proposed new facility and its programs.
- The price of family membership would be “reasonable”.

A. Findings – Total Respondents

Table 3.15 summarizes respondents’ opinions of the likelihood that they would purchase a family membership at the proposed multi-purpose community recreation centre.

Table 3.15: Likelihood of Purchasing a Family Membership at the Proposed Multi-Purpose Community Recreation Centre – Total Respondents

Likelihood	% of Total Respondents (n=254)
Very likely	26.0
Somewhat likely	15.0
Not very likely	15.0
Not at all likely	44.1

- 26.0% of respondents indicated that it is *very likely* that they will purchase a family membership. 26% of respondents that indicated it is *very likely* that they will purchase a family membership are currently a member of a health and fitness facility; 60% of these respondents are a member of a facility in South Huron, 30% are a member of a YMCA, and 35% participate in aquatic activities as part of their membership.
- 15.0% of respondents indicated that it is *somewhat likely* that they will purchase a family membership. 16% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *somewhat likely* that they will purchase a family membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership.

- 15.0% of respondents indicated that it is *not very likely* that they will purchase a family membership. 11% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *not very likely* that they will purchase a family membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership**.**

- 44.1% of respondents indicated that it is *not at all likely* that they will purchase a family membership. 10% of these respondents are currently a member of a health and fitness facility. The number of respondents that indicated it is *not at all likely* that they will purchase a family membership that are currently a member of a health and fitness facility was not of a sufficient size to analyze where it is located, whether it is a YMCA or whether they participated in aquatic activities as part of their membership**.**

B. Findings – By Age Group

The findings varied based on gender:

- A larger proportion of respondents in the 20-39 year age group indicated that it is *very likely* that they will purchase a family membership (40.0% of respondents in the 20-39 year age group), compared to respondents in the 40-64 year age group (23.7%).

  A larger proportion of respondents in the 40-64 year age group indicated that it is *not at all likely* that they will purchase a family membership (47.0% of respondents in the 40-64 year age group), compared to respondents in the 20-39 year age group (25.7%).

C. Findings – By Gender

The findings varied based on gender:

- A larger proportion of female respondents indicated that it is *very likely* that they will purchase a family membership (30.3% of female respondents), compared to male respondents (16.5%).

3.8 Effect of Fee on the Likelihood of Purchasing a Family Membership

Respondents were asked whether they would consider purchasing a family membership at the proposed multi-purpose community recreation centre at two pre-determined price levels: $115/month and $113/month. The question was worded such that respondents were asked about the fee of $115/month first, and if they responded negatively, they were then asked if they would purchase at a lower fee of $113/month.

The results are shown based on whether respondents had previously indicated they were *very likely* or *somewhat likely* to purchase a family membership at the proposed multi-purpose community recreation centre (see Section 3.7.1).

3.8.1 Effect of Fee on Respondents Very Likely to Purchase a Family Membership

A. Findings – Respondents Very Likely to Purchase a Family Membership

Table 3.16 summarizes the effect of the introduction of the monthly fees on potential future family membership among respondents *very likely* to purchase a family membership.

Table 3.16: The Impact of Potential Monthly Membership Fees on Respondents *Very Likely* to Purchase a Family Membership

	A	B
Monthly Membership Fees	**% of Respondents *Very Likely* to Purchase Family Membership (n=66)**	**% of Total Respondents (n=254)**
$115	80.3	20.9
$113	84.8	22.0

- 26.0% of total respondents indicated that they were *very likely* to purchase a family membership at the proposed multi-purpose community recreation centre prior to the consideration of membership fee (see Section 3.7.1). The introduction of the monthly membership fees had a negative impact on the proportion of respondents *very likely* to purchase a family membership:
  - The proportion of respondents *very likely* to purchase a family membership at the proposed multi-purpose community recreation centre decreased 19.7% at the higher fee tested of $115/month (Column A).

- The proportion of respondents *very likel*y to purchase a family membership at the proposed multi-purpose community recreation centre decreased 15.2% at the lower fee tested of $113/month (Column A).

- A reduction in the monthly fee from the higher fee tested did not increase the proportion of total respondents *very likely* to purchase a membership a statistically significant amount. Expressed as a percentage of total respondents, 20.9% of total respondents indicated that they were *very likely* to purchase a family membership at the higher fee of $115/month (Column B). The proportion of total respondents that indicated they were *very likely* to purchase a family membership increased from 20.9% to 22.0% with the introduction of the lower fee of $113/month (Column B), a difference of 1.1% of total respondents, which is less than the margin of error of the research of 7%.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.8.2 Effect of Fee on Respondents Somewhat Likely to Purchase a Family Membership

A. Findings – Respondents Somewhat Likely to Purchase a Family Membership

Table 3.17 summarizes the effect of the introduction of the monthly fees on potential future family membership among respondents *somewhat likely* to purchase a family membership.

Table 3.17: The Impact of Potential Monthly Membership Fees on Respondents *Somewhat Likely* to Purchase a Family Membership

	A	B
Monthly Membership Fees	**% of Respondents *Somewhat Likely* to Purchase Family Membership (n=38)**	**% of Total Respondents (n=254)**
$115	52.6	7.9
$113	52.6	7.9

- 15.0% of total respondents indicated that they were *somewhat likely* to purchase a family membership at the proposed multi-purpose community recreation centre prior to the consideration of membership fee (see Section 3.7.1). The introduction of the monthly membership fees had a statistically significant negative impact on the proportion of respondents *somewhat likely* to purchase a family membership:

  - The proportion of respondents *somewhat likel*y to purchase a family membership at the proposed multi-purpose community recreation centre decreased 47.4% at the higher fee tested of $115/month (Column A).

  - The proportion of respondents *somewhat likel*y to purchase a family membership at the proposed multi-purpose community recreation centre decreased 47.4% at the lower fee tested of $113/month (Column A).

- A reduction in the monthly fee from the higher fee tested did not increase the proportion of total respondents *somewhat likely* to purchase a family membership. Expressed as a percentage of total respondents, 7.9% of total respondents indicated that they were *somewhat likely* to purchase a family membership at the higher fee of $115/month (Column B). The proportion of total respondents that indicated they were *somewhat likely* to purchase a family membership did not increase from 7.9% with the introduction of the lower fee of $113/month (Column B).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.9 Opinions Regarding Preferred Method to Access the Proposed Multi-Purpose Community Recreation Centre

Respondents were asked whether they would prefer to participate at the proposed multi-purpose community recreation centre through the purchase of an adult membership or through the purchase of a family membership.

3.9.1 Preference Among Respondents *Very Likely* or *Somewhat Likely* to Purchase an Adult Membership

A. Findings – Respondents Very Likely or Somewhat Likely to Purchase an Adult Membership

Table 3.18 summarizes the preference for accessing the facility among respondents that previously indicated they were *very likely* or *somewhat like* to purchase an adult membership at each monthly fee.

Table 3.18: Preference for Adult Membership – Respondents *Very Likely* or *Somewhat Likely* to Purchase Adult Membership at Each Fee

Likelihood of Purchasing Adult Membership	Monthly Membership Fee	% of Respondents *Very Likely* or *Somewhat Likely* to Purchase Adult Membership at Each Fee	
		Adult Membership	Family Membership
Very likely	$54	61.4	38.6
	$52	61.2	38.8
Somewhat likely	$54	73.5	23.5
	$52	71.4	22.9

Respondents Very likely to Purchase an Adult Membership

- The proportion of respondents *very likely* to purchase an *adult membership* at each monthly fee tested decreased when asked whether they would prefer to participate through the purchase of an *adult membership* or a *family membership*:
  - 61.4% of respondents *very likely* to purchase an *adult membership* at the higher fee of *$54/month* indicated they would prefer to purchase an *adult membership* and 38.6% indicated they would prefer to purchase a *family membership*.

- 61.2% of respondents *very likely* to purchase an *adult membership* at the lower fee of *$52/month* indicated they would prefer to purchase an *adult membership* and 38.8% indicated they would prefer to purchase a *family membership*.

Respondents Somewhat likely to Purchase an Adult Membership

- The proportion of respondents *somewhat likely* to purchase an *adult membership* at each monthly fee tested decreased when asked whether they would prefer to participate through the purchase of an *adult membership* or a *family membership*:

  - 73.5% of respondents *somewhat likely* to purchase an *adult membership* at the higher fee of *$54/month* indicated they would prefer to purchase an *adult membership* and 23.5% indicated they would prefer to purchase a *family membership.*

  - 71.4% of respondents *somewhat likely* to purchase an *adult membership* at the lower fee of *$52/month* indicated they would prefer to purchase an *adult membership* and 22.9% indicated they would prefer to purchase a *family membership*.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.9.2 Preference Among Respondents *Very Likely* or *Somewhat Likely* to Purchase a Family Membership

A. Findings – Respondents Very Likely or Somewhat Likely to Purchase a Family Membership

Table 3.19 summarizes the preference for accessing the facility through the purchase of a family membership among respondents that previously indicated they were *very likely* or *somewhat like* to purchase a family membership at each monthly fee.

Table 3.19: Preference for Family Membership – Respondents *Very Likely* or *Somewhat Likely* to Purchase Family Membership at Each Fee

Likelihood of Purchasing Family Membership	Monthly Membership Fee	% of Respondents *Very Likely* or *Somewhat Likely* to Purchase Family Membership at Each Fee	
		Adult Membership	Family Membership
Very likely	$115	18.9	81.1
	$113	19.6	80.4
Somewhat likely	$115	40.0	60.0
	$113	40.0	60.0

Respondents Very likely to Purchase a Family Membership

- The majority of respondents *very likely* to purchase a *family membership* at each monthly fee tested indicated that they would prefer to participate through the purchase of a *family membership*:
  - 81.1% of respondents *very likely* to purchase a *family membership* at the higher fee of *$115/month* indicated they would prefer to purchase a *family membership*; 18.9% indicated they would prefer to purchase of an *adult membership*.
  - 80.4% of respondents *very likely* to purchase a *family membership* at the lower fee of *$113/month* indicated they would prefer to purchase a *family membership*; 19.6% indicated they would prefer to purchase of an *adult membership*.

Respondents Somewhat likely to Purchase a Family Membership

- The proportion of respondents *somewhat likely* to purchase a family membership at each monthly fee tested decreased when asked whether they would prefer to participate through the purchase of a *family membership* or an *adult membership*:

  - 60.0% of respondents *somewhat likely* to purchase a *family membership* at the higher fee of *$115/month* indicated they would prefer to purchase a *family membership*; 40.0% indicated they would prefer to purchase an *adult membership*.

  - 60.0% of respondents *somewhat likely* to purchase a *family membership* at the lower fee of *$113/month* indicated they would prefer to purchase a *family membership*; 40.0% indicated they would prefer to purchase an *adult membership*.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.9.3 Summary - Preference for Adult or Family Membership

Table 3.20 summarizes the discrete proportion of total respondents that prefer adult membership and are very likely or somewhat likely to purchase an adult membership at the monthly fees tested, and the discrete proportion of total respondents that prefer family membership and are very likely or somewhat likely to purchase a family membership at the selected monthly fees tested.

Table 3.20: Discrete Proportion of Respondents That Prefer Adult Membership Compared to Family Membership, *Very likely* or *Somewhat Likely* to Purchase at Each Fee

Preferred Type of Membership	Likelihood of Purchasing Membership	Monthly Membership Fee	% of Total Respondents
Adult	Very likely	$54	20.1
		$52	20.5
	Somewhat likely	$54	9.8
		$52	9.8
Family	Very likely	$115	16.9
		$113	17.7
	Somewhat likely	$115	4.7
		$113	4.7

3.10 The Perceived Convenience of the Potential Location for the Proposed Multi-Purpose Community Recreation Centre

Respondents were asked to rate the convenience of the potential location for the proposed multi-purpose community recreation centre, which is Exeter, on a scale of 1 to 5 where "1" is **not at convenient** and "5" is **extremely convenient**.

The responses were analyzed based on:

- Total respondents
- Respondents that prefer an adult membership and are *very likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer an adult membership and are *somewhat likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer a family membership and are *very likely* to purchase at the higher monthly fee tested of $115/month

The number of respondents that indicated they prefer family membership and are *somewhat likely* to purchase at $115/month or $113/month was not of a sufficient size to analyze the perceived convenience of the potential location.

3.10.1 Total Respondents

A. Findings – Total Respondents

Table 3.21 summarizes the findings among respondents.

Table 3.21: The Perceived Convenience of the Proposed Location for the Proposed Multi-Purpose Community Recreation Centre - Total Respondents

Potential Location	Rating (% of Total Respondents n=254)					
	1 (Not at all Convenient)	2	3	4	5 (Extremely Convenient)	Average
Exeter	15.0	--	16.5	10.6	49.6	3.7

- The overall average rating of the convenience of *a location in Exeter* among total respondents was "3.7" (neutral to convenient), with the largest proportion of respondents (49.6%) rating the location as “extremely convenient” and a further 10.6% rating the location as “convenient”.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.10.2 Respondents *That Prefer Adult Membership and are Very Likely* to Purchase at $54/Month

A. Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $54/Month

Table 3.22 summarizes the findings among respondents that prefer adult membership and are *very likely* to purchase at $54/month.

Table 3.22: The Perceived Convenience of the Proposed Location for the Proposed Multi-Purpose Community Recreation Centre - Respondents that Prefer Adult Membership and are *Very Likely* to Purchase at $54/Month

Potential Location	**Rating (% of Respondents *Very Likely* to Purchase an Adult Membership at $54/Month, n=51)**					
	1 (Not at all Convenient)	**2**	**3**	**4**	**5 (Extremely Convenient)**	**Average**
Exeter	--	--	17.6	13.7	62.7	4.4

- The overall average rating of the convenience of *a location in Exeter* among respondents *very likely* to purchase an adult membership at $54/month was “4.4” (convenient), with the majority of respondents *very likely* to purchase an adult membership at $54/month (62.7%) rating the location as “extremely convenient” and a further 13.7% rating the location as “convenient”.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.10.3 Respondents *That Prefer Adult Membership and are Somewhat Likely* to Purchase at $54/Month

A. *Findings – Respondents That Prefer Adult Membership and are Somewhat Likely to Purchase at $54/Month*

Table 3.23 summarizes the findings among respondents that prefer adult membership and are *somewhat likely* to purchase at $54/month.

Table 3.23: The Perceived Convenience of the Proposed Location for the Proposed Multi-Purpose Community Recreation Centre - Respondents That Prefer Adult Membership and are *Somewhat Likely* to Purchase at $54/Month

Potential Location	Rating (% of Respondents *Somewhat Likely* to Purchase an Adult Membership at $54/Month, n=25)					
	1 (Not at all Convenient)	2	3	4	5 (Extremely Convenient)	Average
Exeter	--	--	32.0	24.0	36.0	4.0

- The overall average rating of the convenience of *a location in Exeter* among respondents *somewhat likely* to purchase an adult membership at $54/month was "4.0" (convenient); 36.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated the location as "extremely convenient" and a further 24.0% rating the location as "convenient".

B. *Findings – By Age Group*

The findings did not vary based on age group.

C. *Findings – By Gender*

The findings did not vary based on gender.

3.10.4 Respondents *That Prefer Family Membership and are Very Likely* to Purchase at $115/Month

A. *Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $115/Month*

Table 3.24 summarizes the findings among respondents that prefer family membership and are *very likely* to purchase at $115/month.

Table 3.24: The Perceived Convenience of the Current Location for the Proposed Multi-Purpose Community Recreation Centre - Respondents That Prefer Family Membership and are *Very Likely* to Purchase at $115/Month

Potential Location	Rating (% of Respondents *Very Likely* to Purchase a Family Membership at $115/Month, n=43)					
	1 (Not at all Convenient)	2	3	4	5 (Extremely Convenient)	Average
Exeter	--	--	--	--	83.7	4.8

- The overall average rating of the convenience of *a location in Exeter* among respondents *very likely* to purchase a family membership at $115/month was "4.8" (convenient to extremely convenient); the majority of respondents *very likely* to purchase a family membership at $115/month (83.7%) rated the location as "extremely convenient".

B. *Findings – By Age Group*

The findings did not vary based on age group.

C. *Findings – By Gender*

The findings did not vary based on gender.

3.11 The Relative Importance of Selected Factors to the Decision to Purchase a Membership

Respondents were asked to rate a number of pre-selected factors, on a scale of 1 to 5, in terms of their importance to the decision to purchase a membership at the proposed multi-purpose community recreation centre; a rating of "1" indicated that the factor was not at all important and a rating of "5" indicated that the factor was extremely important.

The responses were analyzed based on:

- Respondents that prefer an adult membership and are *very likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer an adult membership and are *somewhat likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer a family membership and are *very likely* to purchase at the higher monthly fee tested of $115/month

The number of respondents that indicated they prefer family membership and are *somewhat likely* to purchase at $115/month or $113/month was not of a sufficient size to analyze the perceived importance of the selected factors.

3.11.1 Respondents *That Prefer Adult Membership and are Very Likely* to Purchase at $54/Month

A. Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $54/Month

Table 3.25 summarizes the rating for each factor among respondents that prefer adult membership and are *very likely* to purchase at $54/month.

Table 3.25: Rating of Factors That May Affect the Decision to Purchase a Membership – Respondents That Prefer Adult Membership and are *Very Likely* to Purchase at $54/Month

Factors	Rating (% of Respondents *Very Likely* to Purchase an Adult Membership at $54/Month, n=51)					
	1 (Not at all Important)	2	3	4	5 (Extremely Important)	Average
The provision of an indoor pool as part of the facility	--	--	--	17.6	74.5	4.6
The provision of an indoor walking and running track as part of the facility	--	--	--	25.5	58.8	4.3
The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee	--	--	13.7	21.6	58.8	4.3
The location of the facility	--	--	21.6	13.7	54.9	4.1
A location in Exeter	--	--	11.8	27.5	54.9	4.3
Cost of purchasing a membership	--	--	17.6	31.4	47.1	4.2
The ability to participate in selected programs on a pay-per-program basis	--	--	21.6	25.5	35.3	3.7
Access to an adult only change room	23.5	--	19.6	17.6	33.3	3.3
Programs family members can participate in together	15.7	--	29.4	15.7	29.4	3.3
Having a friend/partner to participate with rather than on your own	19.6	--	21.6	33.3	21.6	3.3
Child minding while you work out	72.5	--	--	--	13.7	1.8

-- The proportion of respondents was not statistically significant.

Average Rating

- The following factor was generally rated as "important to extremely important" among respondents *very likely* to purchase an adult membership at $54/month:
  - *The provision of an indoor pool as part of the facility* (average 4.6)
- The following factors were generally rated as "important" among respondents *very likely* to purchase an adult membership at $54/month:
  - *The provision of an indoor walking and running track as part of the facility* (average 4.3)
  - *The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* (average 4.3)
  - *A location in Exeter* (average 4.3)

- *The cost of purchasing a membership* (average 4.2)
- *The location of the facility* (average 4.1)

- The following factor was generally rated as “neutral to important” among respondents *very likely* to purchase an adult membership at $54/month:

  - *The ability to participate in selected programs on a pay-per-program basis* (average 3.7)

- The following factors were generally rated as “neutral” among respondents *very likely* to purchase an adult membership at $54/month:

  - *Access to an adult only change room* (average 3.3)
  - *Programs family members can participate in together* (average 3.3)
  - *Having a friend/partner to participate with rather than on your own* (average 3.3)

- The following factor was generally rated as “not important” among respondents *very likely* to purchase an adult membership at $54/month:

  - *Child minding while you work out* (average 1.8)

<u>Ratings of “Extremely Important” and “Important”</u>

- The majority of respondents *very likely* to purchase an adult membership at $54/month (74.5%) rated *the provision of an indoor pool as part of the facility* as “5” and a further 17.6% rated the factor as “4”.

- 58.8% of respondents *very likely* to purchase an adult membership at $54/month rated *provision of an indoor walking and running track as part of the facility* as “5” and a further 25.5% rated the factor as “4”.

- 58.8% of respondents *very likely* to purchase an adult membership at $54/month rated *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* as “5” and a further 21.6% rated the factor as “4”.

- 54.9% of respondents *very likely* to purchase an adult membership at $54/month rated *the location of the facility* as “5” and a further 13.7% rated the factor as “4”.

- 54.9% of respondents *very likely* to purchase an adult membership at $54/month rated *a location in Exeter* as “5” and a further 27.5% rated the factor as “4”.

- 47.1% of respondents *very likely* to purchase an adult membership at $54/month rated *the cost of purchasing a membership* as “5” and a further 31.4% rated the factor as “4”.

- 35.3% of respondents *very likely* to purchase an adult membership at $54/month rated *the ability to participate in selected programs on a pay-per-program basis* as “5” and a further 25.5% rated the factor as “4”.

- 33.3% of respondents *very likely* to purchase an adult membership at $54/month rated *access to an adult only change room* as “5” and a further 17.6% rated the factor as “4”.

- 29.4% of respondents *very likely* to purchase an adult membership at $54/month rated *programs family members can participate in together* as “5” and a further 15.7% rated the factor as “4”.

- 21.6% of respondents *very likely* to purchase an adult membership at $54/month rated *having a friend/partner to participate with rather than on your own* as “5” and a further 33.3% rated the factor as “4”.

- 13.7% of respondents *very likely* to purchase an adult membership at $54/month rated *child minding while you work out* as “5” and the proportion that rated the factor as “4” was not statistically significant. The majority of respondents *very likely* to purchase an adult membership at $54/month (72.5%) rated this factor as “1” (not at all important).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.11.2 Respondents *That Prefer Adult Membership and are Somewhat Likely* to Purchase at $54/Month

A. *Findings – Respondents That Prefer Adult Membership and are Somewhat Likely to Purchase at $54/Month*

Table 3.26 summarizes the rating for each factor among respondents that prefer adult membership and are *somewhat likely* to purchase at $54/month.

Table 3.26: Rating of Factors That May Affect the Decision to Purchase a Membership – Respondents That Prefer Adult Membership and are *Somewhat Likely* to Purchase at $54/Month

Factors	**Rating (% of Respondents *Somewhat Likely* to Purchase an Adult Membership at $54/Month, n=55)**					
	1 (Not at all Important)	**2**	**3**	**4**	**5 (Extremely Important)**	**Average**
The location of the facility	--	--	--	52.0	44.0	4.4
The provision of an indoor walking and running track as part of the facility	--	--	16.0	28.0	44.0	4.0
The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee	--	--	16.0	40.0	40.0	4.3
The provision of an indoor pool as part of the facility	--	--	16.0	36.0	40.0	4.0
A location in Exeter	--	--	28.0	16.0	40.0	3.7
The ability to participate in selected programs on a pay-per-program basis	--	--	--	48.0	32.0	4.0
Cost of purchasing a membership	--	--	28.0	48.0	24.0	4.0
Having a friend/partner to participate with rather than on your own	--	16.0	28.0	28.0	24.0	3.5
Access to an adult only change room	20.0	12.0	12.0	36.0	20.0	3.2
Programs family members can participate in together	16.0	12.0	20.0	40.0	12.0	3.2
Child minding while you work out	84.0	--	--	--	--	1.6

-- The proportion of respondents was not statistically significant.

Average Rating

- The following factors were generally rated as "important" among respondents *somewhat likely* to purchase an adult membership at $54/month:

  – *The location of the facility* (average 4.4)
  – *The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* (average 4.3)
  – *The provision of an indoor walking and running track as part of the facility* (average 4.0)
  – *The provision of an indoor pool as part of the facility* (average 4.0)
  – *The cost of purchasing a membership* (average 4.0)
  – *The ability to participate in selected programs on a pay-per-program basis* (average 4.0)

- The following factors were generally rated as "neutral to important" among respondents *somewhat likely* to purchase an adult membership at $54/month:

  – *A location in Exeter* (average 3.7)
  – *Having a friend/partner to participate with rather than on your own* (average 3.5)

- The following factors were generally rated as "neutral" among respondents *somewhat likely* to purchase an adult membership at $54/month:

  – *Access to an adult only change room* (average 3.2)
  – *Programs family members can participate in together* (average 3.2)

- The following factor was generally rated as "not important" among respondents *somewhat likely* to purchase an adult membership at $54/month:

  – *Child minding while you work out* (average 1.6)

Ratings of "Extremely Important" and "Important"

- 44.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *the location of the facility* as "5" and a further 52.0% rated the factor as "4".

- 44.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *provision of an indoor walking and running track as part of the facility* as “5” and a further 28.0% rated the factor as “4”.

- 40.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* as “5” and a further 40.0% rated the factor as “4”.

- 40.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *the provision of an indoor pool as part of the facility* as “5” and a further 36.0% rated the factor as “4”.

- 40.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *a location in Exeter* as “5” and a further 16.0% rated the factor as “4”.

- 32.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *the ability to participate in selected programs on a pay-per-program basis* as “5” and a further 48.0% rated the factor as “4”.

- 24.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *the cost of purchasing a membership* as “5” and a further 48.0% rated the factor as “4”.

- 24.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *having a friend/partner to participate with rather than on your own* as “5” and a further 28.0% rated the factor as “4”.

- 20.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *access to an adult only change room* as “5” and a further 36.0% rated the factor as “4”.

- 12.0% of respondents *somewhat likely* to purchase an adult membership at $54/month rated *programs family members can participate in together* as “5” and a further 40.0% rated the factor as “4”.

- The proportion of respondents *somewhat likely* to purchase an adult membership at $54/month that rated *child minding while you work out* as “5” or “4” was not statistically significant. The majority of respondents *somewhat likely* to purchase an adult membership at $54/month (84.0%) rated this factor as “1” (not at all important).

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.11.3 Respondents *That Prefer Family Membership and are Very Likely* to Purchase at $115/Month

A. Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $115/Month

Table 3.27 summarizes the rating for each factor among respondents that prefer family membership and are *very likely* to purchase at $115/month.

Table 3.27: Rating of Factors That May Affect the Decision to Purchase a Membership – Respondents That Prefer Family Membership and are *Very Likely* to Purchase at $115/Month

Factors	**Rating (% of Respondents *Very Likely* to Purchase a Family Membership at $115/Month, n=43)**					
	1 (Not at all Important)	**2**	**3**	**4**	**5** (Extremely Important)	**Average**
A location in Exeter	--	--	--	11.6	76.7	4.6
The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee	--	--	--	23.3	67.4	4.6
The provision of an indoor pool as part of the facility	--	--	11.6	14.0	67.4	4.4
The location of the facility	--	--	14.0	23.3	60.5	4.4
The provision of an indoor walking and running track as part of the facility	--	--	18.6	14.0	55.8	4.1
Programs family members can participate in together	--	--	25.6	16.3	53.5	4.1
Cost of purchasing a membership	--	--	18.6	34.9	46.5	4.3
The ability to participate in selected programs on a pay-per-program basis	--	11.6	37.2	23.3	25.6	3.6
Access to an adult only change room	27.9	16.3	20.9	14.0	20.9	2.8
Child minding while you work out	46.5	--	18.6	--	20.9	2.5
Having a friend/partner to participate with rather than on your own	20.9	16.3	27.9	18.6	16.3	2.9

-- The proportion of respondents was not statistically significant.

Average Rating

- The following factors were generally rated as “important to extremely important” among respondents *very likely* to purchase a family membership at $115/month:

  - *A location in Exeter* (average 4.6)
  - *The ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* (average 4.6)

- The following factors were generally rated as “important” among respondents *very likely* to purchase a family membership at $115/month:

  - *The location of the facility* (average 4.4)
  - *The provision of an indoor pool as part of the facility* (average 4.4)
  - *The cost of purchasing a membership* (average 4.3)
  - *The provision of an indoor walking and running track as part of the facility* (average 4.1)
  - *Programs family members can participate in together* (average 4.1)

- The following factor was generally rated as “neutral to important” among respondents *very likely* to purchase a family membership at $115/month:

  - *The ability to participate in selected programs on a pay-per-program basis* (average 3.6)

- The following factors were generally rated as “not important to neutral” among respondents *very likely* to purchase a family membership at $115/month:

  - *Having a friend/partner to participate with rather than on your own* (average 2.9)
  - *Access to an adult only change room* (average 2.8)
  - *Child minding while you work out* (average 2.5)

Ratings of “Extremely Important” and “Important”

- The majority of respondents *very likely* to purchase a family membership at $115/month (76.7%) rated *a location in Exeter* as “5” and a further 11.6% rated the factor as “4”.

- The majority of respondents *very likely* to purchase a family membership at $115/month (67.4%) rated *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee* as “5” and a further 23.3% rated the factor as “4”.

- The majority of respondents *very likely* to purchase a family membership at $115/month (67.4%) rated *the provision of an indoor pool as part of the facility* as “5” and a further 14.0% rated the factor as “4”.

- The majority of respondents *very likely* to purchase a family membership at $115/month (60.5%) rated *the location of the facility* as “5” and a further 23.3% rated the factor as “4”.

- 55.8% of respondents *very likely* to purchase a family membership at $115/month rated *provision of an indoor walking and running track as part of the facility* as “5” and a further 14.0% rated the factor as “4”.

- 53.5% of respondents *very likely* to purchase a family membership at $115/month rated *programs family members can participate in together* as “5” and a further 16.3% rated the factor as “4”.

- 46.5% of respondents *very likely* to purchase a family membership at $115/month rated *the cost of purchasing a membership* as “5” and a further 34.9% rated the factor as “4”.

- 25.6% of respondents *very likely* to purchase a family membership at $115/month rated *the ability to participate in selected programs on a pay-per-program basis* as “5” and a further 23.3% rated the factor as “4”.

- 20.9% of respondents *very likely* to purchase a family membership at $115/month rated *access to an adult only change room* as “5” and a further 14.0% rated the factor as “4”.

- 20.9% of respondents *very likely* to purchase a family membership at $115/month rated *child minding while you work out* as “5” and the proportion that rated the factor as “4” was not statistically significant. The largest proportion of respondents *very likely* to purchase a family membership at $115/month (46.5%) rated this factor as “1” (not at all important).

- 16.3% of respondents *very likely* to purchase a family membership at $115/month rated *having a friend/partner to participate with rather than on your own* as “5” and a further 18.6% rated the factor as “4”.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.12 Level of Interest in Selected Programs and Activities

Respondents were asked to describe their level of interest in participating in specific programs and activities at the proposed multi-purpose community recreation centre. Respondents could indicate that they were “very likely”, “somewhat likely”, “not very likely”, or “not at all likely” to participate.

The responses were analyzed based on:

- Respondents that prefer an adult membership and are *very likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer an adult membership and are *somewhat likely* to purchase at the higher monthly fee tested of $54/month
- Respondents that prefer a family membership and are *very likely* to purchase at the higher monthly fee tested of $115/month

The number of respondents that indicated they prefer family membership and are *somewhat likely* to purchase at $115/month or $113/month was not of a sufficient size to analyze the level of interest in selected programs and activities.

3.12.1 Respondents *That Prefer Adult Membership and are Very Likely* to Purchase at $54/Month

A. Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $54/Month

Table 3.28 summarizes the opinions of respondents that prefer adult membership and are *very likely* to purchase at $54/month concerning the likelihood of their participation in selected programs and activities at the proposed multi-purpose community recreation centre.

Table 3.28: Likelihood of Participating – Respondents That Prefer Adult Membership and are *Very Likely* to Purchase at $54/Month

Program/Activity	**Likelihood of Participating (n=51)**			
	Very Likely	**Somewhat Likely**	**Not very Likely**	**Not at all Likely**
Recreational swimming	66.7	21.6	--	--
Walking or running indoors on a track	66.7	15.7	11.8	--
The use of cardiovascular conditioning equipment	54.9	31.4		
Lane or lap swimming	51.0	19.6	15.7	11.8
Aquatic fitness classes	51.0	11.8	--	--
Any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba	45.1	35.3	--	--
Warm water therapy or rehab	43.1	25.5	15.7	15.7
The use of weights or weight machines	33.3	27.5	19.6	17.6
Swim lessons or stroke improvement	27.5	19.6	19.6	33.3
Adult gymnasium sports	19.6	23.5	29.4	25.5

-- The proportion of respondents was not statistically significant.

- The following summarizes the likelihood of participating in each program/activity tested:

  – The majority of respondents *very likely* to purchase an adult membership at $54/month (66.7%) indicated they are *very likely* to participate in *recreational swimming* and a further 21.6% indicated they are *somewhat likely*.

  – The majority of respondents *very likely* to purchase an adult membership at $54/month (66.7%) indicated they are *very likely* to participate in *walking or running indoors on a track* and a further 15.7% indicated they are *somewhat likely*.

  – 54.9% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *the use of cardiovascular conditioning equipment* and a further 31.4% indicated they are *somewhat likely*.

  – 51.0% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *lane or lap swimming* and a further 19.6% indicated they are *somewhat likely*.

  – 51.0% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *aquatic* *fitness classes* and a further 11.8% indicated they are *somewhat likely*.

- 45.1% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba* and a further 35.3% indicated they are *somewhat likely*.
- 43.1% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *warm water therapy or rehab* and a further 25.5% indicated they are *somewhat likely.*
- 33.3% respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *the use of weights and weights machines* and a further 27.5% indicated they are *somewhat likely*.
- 27.5% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *swim lessons or stroke improvement* and a further 19.6% indicated they are *somewhat likely.*
- 19.6% of respondents *very likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *adult gymnasium sports* and a further 23.6% indicated they are *somewhat likely.*

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.12.2 Respondents *That Prefer Adult Membership and are Somewhat Likely* to Purchase at $54/Month

A. *Findings – Respondents That Prefer Adult Membership and are Somewhat Likely to Purchase at $54/Month*

Table 3.29 summarizes the opinions of respondents that prefer adult membership and are *somewhat likely* to purchase at $54/month concerning the likelihood of their participation in selected programs and activities at the proposed multi-purpose community recreation centre.

Table 3.29: Likelihood of Participating – Respondents that Prefer Adult Membership and are *Somewhat Likely* to Purchase at $54/Month

Program/Activity	Likelihood of Participating (n=25)			
	Very Likely	Somewhat Likely	Not very Likely	Not at all Likely
Recreational swimming	44.0	24.0	12.0	20.0
Aquatic fitness classes	40.0	32.0	--	20.0
Walking or running indoors on a track	36.0	44.0	12.0	--
Any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba	24.0	44.0	28.0	--
The use of cardiovascular conditioning equipment	16.0	52.0	24.0	--
Lane or lap swimming	16.0	36.0	24.0	24.0
The use of weights or weight machines	16.0	28.0	44.0	12.0
Warm water therapy or rehab	12.0	36.0	32.0	20.0
Adult gymnasium sports	--	28.0	44.0	24.0
Swim lessons or stroke improvement	--	20.0	36.0	36.0

-- The proportion of respondents was not statistically significant.

- The following summarizes the likelihood of participating in each program/activity tested:
  - 44.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *recreational swimming* and a further 24.0% indicated they are *somewhat likely*.
  - 40.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *aquatic fitness classes* and a further 32.0% indicated they are *somewhat likely*.

- 36.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *walking or running indoors on a track* and a further 44.0% indicated they are *somewhat likely*.
- 24.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba* and a further 44.0% indicated they are *somewhat likely*.
- 16.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *the use of cardiovascular conditioning equipment* and a further 52.0% indicated they are *somewhat likely*.
- 16.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *lane or lap swimming* and a further 36.0% indicated they are *somewhat likely*.
- 16.0% respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *the use of weights and weights machines* and a further 28.0% indicated they are *somewhat likely*.
- 12.0% of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *warm water therapy or rehab* and a further 36.0% indicated they are *somewhat likely.*
- The proportion of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *adult gymnasium sports* was not statistically significant; 28.0% indicated they are *somewhat likely.*
- The proportion of respondents *somewhat likely* to purchase an adult membership at $54/month indicated they are *very likely* to participate in *swim lessons or stroke improvement* was not statistically significant; 20.0% indicated they are *somewhat likely.*

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

3.12.3 Respondents *That Prefer Family Membership and are Very Likely* to Purchase at $115/Month

A. Findings – Respondents That Prefer Adult Membership and are Very Likely to Purchase at $115/Month

Table 3.30 summarizes the opinions of respondents that prefer family membership and are *very likely* to purchase at $115/month concerning the likelihood of their participation in selected programs and activities at the proposed multi-purpose community recreation centre.

Table 3.30: Likelihood of Participating – Respondents that Prefer Family Membership and are *Very Likely* to Purchase at $115/Month

Program/Activity	Likelihood of Participating (n=43)			
	Very Likely	Somewhat Likely	Not very Likely	Not at all Likely
Recreational swimming	69.8	14.0	--	--
Walking or running indoors on a track	67.4	16.3	11.6	--
Aquatic fitness classes	53.5	27.9	11.6	--
Any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba	51.2	34.9	11.6	--
Lane or lap swimming	51.2	16.3	18.6	14.0
Swim lessons or stroke improvement	48.8	20.9	23.3	--
The use of weights or weight machines	39.5	37.2	11.6	11.6
Warm water therapy or rehab	37.2	--	37.2	18.6
The use of cardiovascular conditioning equipment	34.9	41.9	16.3	
Adult gymnasium sports	27.9	32.6	18.6	20.9

-- The proportion of respondents was not statistically significant.

- The following summarizes the likelihood of participating in each program/activity tested:
  - 69.8% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *recreational swimming* and a further 14.0% indicated they are *somewhat likely*.
  - 67.4% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *walking or running indoors on a track* and a further 16.3% indicated they are *somewhat likely*.

- 53.5% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *aquatic fitness classes* and a further 27.9% indicated they are *somewhat likely*.
- 51.2% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba* and a further 34.9% indicated they are *somewhat likely*.
- 51.2% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *lane or lap swimming* and a further 16.3% indicated they are *somewhat likely*.
- 48.8% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *swim lessons or stroke improvement* and a further 20.9% indicated they are *somewhat likely.*
- 39.5% respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *the use of weights and weights machines* and a further 37.2% indicated they are *somewhat likely*.
- 37.2% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *warm water therapy or rehab*; the proportion of respondents that indicated they are *somewhat likely* to participate in this activity was not statistically significant.
- 34.9% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *the use of cardiovascular conditioning equipment* and a further 41.9% indicated they are *somewhat likely*.
- 27.9% of respondents *very likely* to purchase a family membership at $115/month indicated they are *very likely* to participate in *adult gymnasium sports* and a further 32.6% indicated they are *somewhat likely*.

B. Findings – By Age Group

The findings did not vary based on age group.

C. Findings – By Gender

The findings did not vary based on gender.

4.0 INTERPRETATION OF THE RESEARCH RESULTS

This section presents the interpretation of the results of the research regarding the potential target market segments and associated level of potential demand for adult and family membership associated with a proposed multi-purpose community recreation centre among adults 20-64 years of age in the Market Area.

The following analyses regarding the potential target market segments are presented:

- The total potential number of adult memberships at the proposed multi-purpose community recreation centre at a proposed monthly fee

- The total potential number of family memberships at the proposed multi-purpose community recreation centre at a proposed monthly fee

- The characteristics of the potential target market segments

- Additional considerations and observations

4.1 Base Population Data for the Market Area

Projections of the order of magnitude of potential demand for adult and family membership at the proposed multi-purpose community recreation centre have been developed based on the extrapolation of the research findings to the population of adults 20-64 that reside in the Market Area.

The total population of adults 20-64 years of age residing in the Market Area in 2016 was 5,405 (Table 4.1).

Table 4.1: Total Population of Adults 20-64 Years of Age in the Market Area, 2016

Age Group	Gender	2016 Population*
20-39	Males	1,045
	Females	965
40-64	Males	1,655
	Females	1,740
Total		**5,405**

* Source: Statistics Canada 2016 Census

Older adults 40-64 years of age represented a larger proportion of the population of adults 20-64 years of age in the Market Area (63%) compared to younger adults 20-39 years of age (37%).

The population of adults 20-64 years of age in the Market Area was equally distributed between males and females.

4.2 Potential Market Segments for Adult Membership at the Proposed Multi-Purpose Community Recreation Centre

This section presents a projection of the order of magnitude size and characteristics of the potential market for adult and family membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age in the Market Area.

4.2.1 The Potential Market for Adult Membership

The potential market for adult membership at the proposed multi-purpose community recreation centre is comprised of market segments based on the likelihood of purchasing an adult membership (e.g. *very likely, somewhat likely, not very likely,* or *not at all likely*) among adults 20-64 years of age. The market segments with the highest probability of potential membership purchase at the proposed multi-purpose community recreation centre are:

- Adults 20-64 years of age that prefer adult membership versus family membership and are *very likely* to purchase an adult membership
- Adults 20-64 years of age that prefer adult membership versus family membership and are *somewhat likely* to purchase an adult membership

For the purposes of this research these market segments are designated as:

- The potential primary market segment: Adults 20-64 years of age that prefer adult membership versus family membership and are *very likely* to purchase an adult membership at the proposed multi-purpose community recreation centre.

- The potential secondary market segment: Adults 20-64 years of age that prefer adult membership versus family membership and are *somewhat likely* to purchase an adult membership at the proposed multi-purpose community recreation centre.

The research findings identified that the introduction of membership fees had a negative impact on the potential primary and secondary market segments for adult membership, however the lower monthly membership fee tested ($52/month) did not result in a statistically significant increase in the proportion of respondents *very likely* or *somewhat likely* to purchase an adult membership. Therefore, the analysis of the order of magnitude size of the potential primary and secondary market segments for adult membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age is based on the higher fee tested of $54/month.

The following sections present an analysis of the order of magnitude size and characteristics of the potential primary and secondary market segments for adult membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age.

4.2.2 The Order of Magnitude Size and Characteristics of the Potential **Primary** Market Segment for Adult Membership

The results of the research identified that 20.1% (or between 16.6% and 13.6% given the research margin of error) of respondents 20-64 years of age prefer adult membership and are *very likely* to purchase an adult membership at $54/month. They comprise the total potential primary market segment for adult membership (Table 4.2 A).

Table 4.2 A: The Total Potential Primary Market Segment for Adult Membership at $54/Month

% of Total Respondents
20.1
(16.6 – 13.6)

( ) The margin of error of the research +/- 3.5%

The proportion of respondents that prefer adult membership and are *very likely* to purchase an adult membership at $54/month was extrapolated to the 2016 population of the Market Area 20-64 years of age to derive an estimate of the order of magnitude size of the total potential primary market segment for adult memberships at $54/month (Table 4.2 B). This results in between 900 to 1,275 adult memberships at $54/month.

Table 4.2 B: The Total Potential Primary Market Segment for Adult Membership at $54/Month Extrapolated to the 2016 Population 20-64 Years of Age

# of Individual Adult Memberships
900 – 1,275

However, it is important to incorporate an allowance or adjustment that reflects the likelihood that not all respondents that indicated they would prefer to purchase an adult membership and are *very likely* to purchase an adult membership at $54/month may actually purchase an adult membership. It is considered a best practice to apply a “capture rate” or “conversion rate” to projections of market demand for membership based services. A capture rate or conversion rate projects the portion of the total potential primary market segment that may purchase an adult membership. It incorporates consideration of the potential for a number of factors to occur that may influence the decision to purchase a membership such as intervening opportunities, changes in lifestyle, or changes in health/ability to participate.

Table 4.3 identifies the implications of a series of capture rates to the total potential primary market segment for adult membership at $54/month, as well as the statistical parameters of the research (i.e. a margin of error of +/- 3.5%).

Table 4.3: Implication of Capture Rates on the Total Potential Primary Market Segment for Adult Membership at $54/Month

Capture Rate	# of Potential Adult Memberships (Potential Primary Market Segment)
100%	900 – 1275
60%	540 – 765
55%	495 – 700
50%	450 – 640
45%	400 – 575
40%	360 – 510
35%	315 – 445

The following research findings concerning this market segment were considered in order to estimate what portion of the total potential primary market segment the proposed multi-purpose community recreation centre may capture:

- 40% are 20-39 years of age and 60% are 40-64 years of age; 36% are males and 64% are females.

- 25% of the potential primary market segment is from households of couples with children, 40% are from households of couples without children, 16% are from households with multiple generations/multiple families, and 16% are from one-person households.

- 14% of the potential primary market segment is currently a member of a health and fitness facility; the number of respondents that indicated they are currently a member of a health and fitness facility was not large enough to analyze their responses regarding the location of the facility at which they are a member, whether it is a YMCA or whether they participate in aquatics as part of their membership. 86% of the potential primary market segment is not currently a member of a health and fitness facility; the reasons they are not currently a member include *facilities are too far away* (30%), *no time* (18%), *cost* (13%) and *no interest* (11%).

- The largest proportion of the potential primary market segment is *somewhat aware* of the YMCA and the programs and services provided (43%), and a further 24% is *very aware*. 33% of the potential primary market segment is either *not very aware* or *not at all aware* of the YMCA and the programs and services provided.

- The potential primary market segment is somewhat intimidated in a health and fitness environment and is more likely to participate in a health and fitness environment and associated programs/activities with members of their own gender.

- The potential primary market segment is generally more likely to participate in a health and fitness environment and associated programs/activities in a group setting and with a friend or partner rather than on their own.

- Almost the entire potential primary market segment enjoys the activity of swimming (98%).

- A portion of the potential primary market segment is currently participating in the activities proposed to be provided at the proposed facility including *the use of cardiovascular conditioning equipment* (45%), *the use of weights or weight machines* (33%), *walking or running indoors not on a treadmill* (29%), *any type of group fitness class* (28%), *recreational swimming* (24%), *indoor swimming lessons or stroke improvement* (18%), *gymnasium sports* (16%), and *aquatic fitness classes indoors* (14%). The proportion that participated in *water therapy or aquatic rehab indoors* was not statistically significant.

  The majority that participated in *the use of cardiovascular conditioning equipment* and *the use of weights or weight machines* participated *at no cost at home* and those that participated in *walking or running indoors not on a treadmill* participated *at no cost through a range of providers*. The number of respondents that indicated they participated in the other activities tested was not of a sufficient size to profile their participation.

- The factors perceived to be the most important to the decision to purchase a membership at the proposed multi-purpose community recreation centre among the potential primary market segment for adult membership included *the provision of an indoor pool and an indoor walking and running track as part of the facility*, *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee, a location in Exeter, the cost of purchasing a membership,* and *the location of the facility*.

- The potential primary market segment rated the convenience of the current location for the proposed multi-purpose community recreation centre as “4.4” out of “5”, or “convenient”.

Based on the findings of the market research and our experience, we estimate that a capture rate of 50%, applied to the total potential primary market segment for adult membership at the proposed fee of $54/month, may be a realistic projection of the order of magnitude of potential adult memberships among adults 20-64 years of age from among this market segment. This results in a potential primary market segment comprised of a total of between 450 to 640 adult memberships among adults 20-64 years of age based on a fee of $54/month for the Market Area.

4.2.3 The Order of Magnitude Size and Characteristics of the Potential **Secondary** Market Segment for Adult Membership

The results of the research indicated that 9.8% (or between 6.3% and 13.3% given the research margin of error) of respondents 20-64 years of age prefer adult membership and are *somewhat likely* to purchase an adult membership at $54/month. They comprise the total potential secondary market segment for adult membership (Table 4.4 A).

Table 4.4 A: The Total Potential Secondary Market Segment for Adult Membership at $54/Month

% of Total Respondents
9.8
(6.3 – 13.3)

( ) The margin of error of the research +/- 3.5%

The proportion of respondents that prefer adult membership and are *somewhat likely* to purchase an adult membership at $54/month was extrapolated to the 2016 population of the Market Area 20-64 years of age to derive an estimate of the order of magnitude size of the total potential secondary market segment for adult memberships at $54/month (Table 4.4 B). This results in between 340 to 720 adult memberships at $54/month.

Table 4.4 B: The Total Potential Secondary Market Segment for Adult Membership at $54/Month Extrapolated to the 2016 Population 20-64 Years of Age

# of Individual Adult Memberships
340 – 720

However, it is important to incorporate an allowance or adjustment that reflects the likelihood that not all respondents that indicated they would prefer to purchase an adult membership and are *very likely* to purchase an adult membership at $54/month may actually purchase an adult membership. It is considered a best practice to apply a “capture rate” or “conversion rate” to projections of market demand for membership based services. A capture rate or conversion rate projects the portion of the total potential secondary market segment that may purchase an adult membership. It incorporates consideration of the potential for a number of factors to occur that may influence the decision to purchase a membership such as intervening opportunities, changes in lifestyle, or changes in health/ability to participate.

Table 4.5 identifies the implications of a series of capture rates to the total potential secondary market segment for adult membership at $54/month, as well as the statistical parameters of the research (i.e. a margin of error of +/- 3.5%).

Table 4.5: Implication of Capture Rates on the Total Potential Secondary Market Segment for Adult Membership at $54/Month

Capture Rate	# of Potential Adult Memberships (Potential Secondary Market Segment)
100%	340 – 720
60%	205 – 430
55%	185 – 395
50%	170 – 360
45%	155 – 325
40%	135 – 290
35%	120 – 250

The following research findings concerning this market segment were considered in order to estimate what portion of the total potential secondary market segment the proposed multi-purpose community recreation centre may capture:

- 34% are 20-39 years of age and 66% are 40-64 years of age; 30% are males and 70% are females.
- 25% of the potential secondary market segment is from households of couples with children, 47% are from households of couples without children, and 20% are from one-person households.
- 16% of the potential secondary market segment is currently a member of a health and fitness facility; the number of respondents that indicated they are currently a member of a health and fitness facility was not large enough to analyze their responses regarding the location of the facility at which they are a member, whether it is a YMCA or whether they participate in aquatics as part of their membership. 84% of the potential secondary market segment is not currently a member of a health and fitness facility; the reasons they are not currently a member include *facilities are too far away* (33%), *no time* (19%), *cost* (14%) and *no interest* (14%).
- The largest proportion of the potential secondary market segment is either *not very aware* or *somewhat aware* of the YMCA and the programs and services provided (44% and 36%, respectively). 16% of the potential secondary market segment is *not at all aware* of the YMCA and the programs and services provided and the proportion of respondents that is *very aware* was not statistically significant (4.0%).

- The potential secondary market segment is intimidated in a health and fitness environment and is more likely to participate in a health and fitness environment and associated programs/activities with members of their own gender.

- The potential secondary market segment is generally more likely to participate in a health and fitness environment and associated programs/activities in a group setting and with a friend or partner rather than on their own.

- The majority of the potential secondary market segment enjoys the activity of swimming (88%).

- A portion of the potential secondary market segment is currently participating in the activities proposed to be provided at the proposed facility including *the use of cardiovascular conditioning equipment* (36%), *the use of weights or weight machines* (32%), *recreational swimming* (32%), *any type of group fitness class* (24%), *indoor swimming lessons or stroke improvement* (16%), *walking or running indoors not on a treadmill* (12%), *gymnasium sports* (12%), and *aquatic fitness classes indoors* (12%). The proportion that participated in *water therapy or aquatic rehab indoors* was not statistically significant. The number of respondents that indicated they participated in the activities tested was not of a sufficient size to profile their participation.

- The factors perceived to be the most important to the decision to purchase a membership at the proposed multi-purpose community recreation centre among the potential secondary market segment for adult membership included *the location of the facility*, *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee, the provision of an indoor pool and an indoor walking and running track as part of the facility, the cost of purchasing a membership,* and *the ability to participate in selected programs on a pay-per-program basis*.

- The potential secondary market segment rated the convenience of the current location for the proposed multi-purpose community recreation centre as “4.0” out of “5”, or “convenient”.

Based on the findings of the market research and our experience, we estimate that a capture rate of 40%, applied to the total potential secondary market segment for adult membership at the proposed fee of $54/month, may be a realistic projection of the order of magnitude of potential adult memberships among adults 20-64 years of age from among this market segment. This results in a potential secondary market segment comprised of a total of between 135 to 290 adult memberships among adults 20-64 years of age based on a fee of $54/month for the Market Area.

4.2.4 Order of Magnitude Size of the Potential Market for Adult Membership at $54/Month

The following summarizes the projections of the order of magnitude number of potential adult memberships at the proposed multi-purpose community recreation centre at $54/month, including consideration of capture rates.

The total number of adult memberships at the proposed multi-purpose community recreation centre, among adults 20-64 years of age in the Market Area, based on the assumptions identified in this report and the findings of market research may be in the order of magnitude of between 585 to 930 members at $54/month, comprised of:

Primary Market Segment:	450 to 640 adult memberships
Secondary Market Segment:	135 to 290 adult memberships
Potential number of memberships at $54/month:	**585 to 930 adult memberships**

4.3 Potential Market Segments for Family Membership at the Proposed Multi-Purpose Community Recreation Centre

This section contains a projection of the order of magnitude size and characteristics of the potential market for family membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age.

4.3.1 The Potential Market for Family Membership

The potential market for family membership at the proposed multi-purpose community recreation centre is comprised of market segments based on the likelihood of purchasing a family membership (e.g. *very likely, somewhat likely, not very likely,* or *not at all likely*) among adults 20-64 years of age. The market segments with the highest probability of potential family membership purchase at the proposed multi-purpose community recreation centre are:

- Adults 20-64 years of age that prefer family membership versus adult membership and are *very likely* to purchase a family membership

- Adults 20-64 years of age that prefer family membership versus adult membership and are *somewhat likely* to purchase a family membership

For the purposes of this research these market segments are designated as:

- The <u>potential primary market segment for family membership</u>: Adults 20-64 years of age that prefer family membership versus adult membership and are *very likely* to purchase a family membership at the proposed multi-purpose community recreation centre.

- The <u>potential secondary market segment for family membership</u>: Adults 20-64 years of age that prefer family membership versus adult membership and are *somewhat likely* to purchase a family membership at the proposed multi-purpose community recreation centre.

The research findings identified that the introduction of membership fees had a negative impact on the potential primary and secondary market segments for family membership, however the lower monthly membership fee tested ($113/month) did not result in a statistically significant increase in the proportion of respondents *very likely* or *somewhat likely* to purchase a family membership. Therefore, the analysis of the order of magnitude size of the potential primary and secondary market segments for family membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age is based on the higher fee tested of $115/month.

The following sections present an analysis of the order of magnitude size and characteristics of the potential primary and secondary market segments for family membership at the proposed multi-purpose community recreation centre among adults 20-64 years of age.

4.3.2 The Order of Magnitude Size and Characteristics of the Potential **Primary** Market Segment for Family Membership

The results of the research indicated that 16.9% (or between 13.4% and 20.4% given the research margin of error) of respondents 20-64 years of age prefer family membership and are *very likely* to purchase a family membership at $115/month. They comprise the total potential primary market segment for family memberships at $115/month (Table 4.6 A).

Table 4.6 A: The Total Potential Primary Market Segment for Family Membership at $115/Month

% of Total Respondents
16.9
(13.4 – 20.4)

( ) The margin of error of the research +/- 3.5%

The proportion of respondents that prefer family membership and are *very likely* to purchase a family membership at $115/month was extrapolated to the 2016 population of the Market Area 20-64 years of age to derive an estimate of the order of magnitude size of the total potential primary market segment for family memberships at $115/month (Table 4.6 B). This results in between 725 to 1,110 family memberships at $115/month.

Table 4.6 B: The Total Potential Primary Market Segment for Family Membership at $115/Month Extrapolated to the 2016 Population 20-64 Years of Age

# of Individual Family Memberships
725 – 1,110

As has been previously noted, it is important to incorporate an allowance or adjustment that reflects the likelihood that not all respondents that indicated they would prefer to purchase a family membership and are *very likely* to purchase a family membership at $115/month may actually purchase a family membership. It is considered a best practice to apply a “capture rate” or “conversion rate” to projections of market demand for membership based services. A capture rate or conversion rate projects the portion of the total potential primary market segment that may purchase a family membership. It incorporates consideration of the potential for a number of factors to occur that may influence the decision to purchase a membership such as intervening opportunities, changes in lifestyle, or changes in health/ability to participate.

Table 4.7 identifies the implications of a series of capture rates to the total potential primary market segment for family membership at $115/month, as well as the statistical parameters of the research (i.e. a margin of error of +/- 3.5%).

Table 4.7: Implication of Capture Rates on the Total Primary Market Segment for Family Membership at $115/Month

Capture Rate	# of Potential Family Memberships (Potential Primary Market Segment)
100%	725 – 1,110
60%	435 – 660
55%	400 – 605
50%	360 – 550
45%	325 – 495
40%	290 – 440
35%	255 – 385

The following research findings concerning this market segment were considered in order to estimate what portion of the total potential primary market segment the proposed multi-purpose community recreation centre may capture:

- 39% are 20-39 years of age and 61% are 40-64 years of age; 45% are males and 55% are females.
- 65% of the potential primary market segment is from households of couples with children, 16% are from households of couples without children, and 14% are from single parent families.
- 26% of the potential primary market segment is currently a member of a health and fitness facility; the number of respondents that indicated they are currently a member of a health and fitness facility was not large enough to analyze their responses regarding the location of the facility at which they are a member, whether it is a YMCA or whether they participate in aquatics as part of their membership. 74% of the potential primary market segment is not currently a member of a health and fitness facility; the reasons they are not currently a member include *facilities are too far away* (31%), *no time* (25%), and *work out at home* (16%).

- The largest proportion of the potential primary market segment is either *very aware* or *somewhat aware* of the YMCA and the programs and services provided (40% and 42%, respectively). 19% of the potential primary market segment is either *not very aware* or *not at all aware* of the YMCA and the programs and services provided.

- The potential primary market segment is somewhat intimidated in a health and fitness environment and is more likely to participate in a health and fitness environment and associated programs/activities with members of their own gender.

- The potential primary market segment is generally more likely to participate in a health and fitness environment and associated programs/activities in a group setting and with a friend or partner rather than on their own.

- The majority of the potential primary market segment enjoys the activity of swimming (88%).

- A portion of the potential primary market segment is currently participating in the activities proposed to be provided at the proposed facility including *the use of cardiovascular conditioning equipment* (47%), *indoor swimming lessons or stroke improvement* (44%), *the use of weights or weight machines* (42%), *recreational swimming* (37%), *walking or running indoors not on a treadmill* (33%), *any type of group fitness class* (28%), *gymnasium sports* (26%), and *aquatic fitness classes indoors* (19%). The proportion that participated in *water therapy or aquatic rehab indoors* was not statistically significant.

  The majority that participated in *the use of cardiovascular conditioning equipment* and *the use of weights or weight machines* participated *at no cost at home* or *at a health and fitness facility through the purchase of a membership.* Those that participated in *indoor swimming lessons or stroke improvement* or *recreational swimming* participated *through a range of providers on a pay-per-program basis* or *through the purchase of a membership*. The number of respondents that indicated they participated in the other activities tested was not of a sufficient size to profile their participation.

- The factors perceived to be the most important to the decision to purchase a membership at the proposed multi-purpose community recreation centre among the potential primary market segment for family membership included *a location in Exeter*, *the ability to access all the programs you want through the purchase of an all inclusive membership for a monthly fee, the location of the facility, the provision of an indoor pool and an indoor walking and running track as part of the facility, the cost of purchasing a membership,* and *programs family members can participate in together*.

- The potential primary market segment rated the convenience of the current location for the proposed multi-purpose community recreation centre as “4.8” out of “5”, or “convenient to extremely convenient”.

Based on the findings of the market research and our experience, we estimate that a capture rate of 50%, applied to the total potential primary market segment for family membership at the proposed fee of $115/month, may be a realistic projection of the order of magnitude of potential family memberships among adults 20-64 years of age from among this market segment. This results in a potential primary market segment comprised of a total of between 360 to 550 family memberships among adults 20-64 years of age based on a fee of $115/month for the Market Area.

4.3.3 The Order of Magnitude Size and Characteristics of the Potential **Secondary** Market Segment for Family Membership

The results of the research indicated that 4.7% (or between 1.2% and 8.2% given the research margin of error) of respondents 20-64 years of age prefer family membership and are *somewhat likely* to purchase a family membership at $115/month. They comprise the total potential secondary market segment for family memberships at $115/month (Table 4.8 A).

Table 4.8 A: The Total Potential Secondary Market Segment for Family Membership at $115/Month

% of Total Respondents
4.7
(1.2 – 8.2)

( ) The margin of error of the research +/- 3.5%

The proportion of respondents that prefer family membership and are *somewhat likely* to purchase a family membership at $115/month was extrapolated to the 2016 population of the Market Area 20-64 years of age to derive an estimate of the order of magnitude size of the total potential secondary market segment for family memberships at $115/month (Table 4.8 B). This results in between 65 to 445 family memberships at $115/month.

Table 4.8 B: The Total Potential Secondary Market Segment for Family Membership at $115/Month Extrapolated to the 2016 Population 20-64 Years of Age

# of Individual Family Memberships
65 – 445

As has been previously noted, it is important to incorporate an allowance or adjustment that reflects the likelihood that not all respondents that indicated they would prefer to purchase a family membership and are *somewhat likely* to purchase a family membership at $115/month may actually purchase a family membership. It is considered a best practice to apply a “capture rate” or “conversion rate” to projections of market demand for membership based services. A capture rate or conversion rate projects the portion of the total potential secondary market segment that may purchase a family membership. It incorporates consideration of the potential for a number of factors to occur that may influence the decision to purchase a membership such as intervening opportunities, changes in lifestyle, or changes in health/ability to participate.

Table 4.9 identifies the implications of a series of capture rates to the total potential secondary market segment for family membership at $115/month, as well as the statistical parameters of the research (i.e. a margin of error of +/- 3.5%).

Table 4.9: Implication of Capture Rates on the Total Secondary Market Segment for Family Membership at $115/Month

Capture Rate	# of Potential Family Memberships (Potential Primary Market Segment)
100%	65 - 445
60%	40 - 265
55%	35 - 245
50%	30 - 220
45%	30 - 200
40%	25 - 175
35%	20 - 155

Research findings concerning this market segment would typically be considered in order to estimate what portion of the total potential secondary market segment the proposed new facility may capture. However, due to the relatively small size of the market segment (i.e. 1.2% to 8.2% of total respondents) there were not a sufficient number of respondents to produce a statistically valid profile of this market segment. A general estimate of the portion of the total potential primary market segment the proposed new facility may capture has been established by considering the research findings and our experience.

Based on the findings of the market research and our experience, we estimate that a capture rate of 40%, applied to the total potential secondary market segment for family membership at the proposed fee of $115/month, may be a realistic projection of the order of magnitude of potential family memberships among adults 20-64 years of age from among this market segment. This results in a potential secondary market segment comprised of a total of between 25 to 175 family memberships among adults 20-64 years of age based on a fee of $115/month for the Market Area.

4.3.4 Order of Magnitude Size of the Potential Market for Family Membership at $115/Month

The following summarizes the projections of the order of magnitude number of potential family memberships at the proposed multi-purpose community recreation centre at $115/month, including consideration of capture rates.

The total number of family memberships at the proposed multi-purpose community recreation centre, among adults 20-64 years of age in the Market Area, based on the assumptions identified in this report and the findings of market research may be in the order of magnitude of between 385 to 725 members at $115/month, comprised of:

Primary Market Segment:	360 to 550 family memberships
Secondary Market Segment:	25 to 175 family memberships
Potential number of memberships at $115/month:	**385 to 725 family memberships**

4.4 Conclusions

4.4.1 Summary of the Size of the Potential Market for Membership at the Proposed Multi-Purpose Community Recreation Centre

The total number of adult and family memberships at the proposed multi-purpose community recreation centre, among adults 20-64 years of age in the Market Area, based on the assumptions identified in this report and the findings of market research may be in the order of magnitude of between 970 to 1,655 discrete memberships, comprised of the following:

Adult Membership at $54/Month	*Primary* Market Segment *Secondary* Market Segment Sub-Total Adult Membership	450 to 640 adult memberships 135 to 290 adult memberships **585 to 930 adult memberships**
Family Membership at $115/Month	*Primary* Market Segment *Secondary* Market Segment Sub-Total Family Membership	360 to 550 family memberships 25 to 175 family memberships **385 to 725 family memberships**
TOTAL MEMBERSHIPS		**970 to 1,655 memberships**

4.4.2 Significant General Level of Interest in Membership at the Proposed Multi-Purpose Community Recreation Centre

The research identified a significant level of interest in participation at the proposed facility on a membership basis. 43.7% of adults 20-64 stated they were *very likely* to purchase an adult membership and 23.2% stated they were *somewhat likely* to purchase an adult membership **before the introduction of membership fees**. This represents 66.9% of adults 20-64 years of age in the market area, which should be considered to be a relatively high level of interest among this market segment.

4.4.3 Concern Regarding the Size of the Adult Population in the Market Area

The total population of the Municipality of South Huron was 10,096 in 2016. The adult age group (20-64 years of age) represented 54% of the total population (5,405). The size of the total population and the size of the adult age group represent a degree of risk associated with market potential since even if potential participation rates or the proportion of adults interested in membership (the penetration rate) are high by industry standards, the relatively small size of the population base will impact the viability of service provision.

This means that efforts to maximize membership among those 65 years of age and older and those under the age of 20 will be more critical to operational viability than is typically the case in markets with either a larger population base in total or a larger adult age group.

This also emphasizes the importance of scaling the size of the indoor aquatic component to be consistent with the size of the market area and the size and characteristics of the potential market segments as identified in the research.

4.4.4 Concern Regarding the Size of the Potential Secondary Market for Membership at the Proposed Multi-Purpose Community Recreation Centre

The size of the potential secondary market segments for adult and family membership is relatively small.

In our previous market research studies for these types of facilities the potential secondary market segments for adult or family membership are typically larger than the potential primary market segments.

As a result, the small size of the potential market segments for either type of membership should be regarded as a significant concern. The main reason for this concern is related to the nature of membership and participation in these types of services and facilities. All aquatic and fitness operations experience a "turn-over" among users. In a "membership" based operational model this is related to a number of factors, most notably the quality of the membership service and the experience of the member. Trends in both the public and private sector indicate that this turn-over of members or membership retention (includes consideration of attendance, adherence, drop-out and retention factors) may average in the order of 70% to 75%, this means that there is a loss of members and a need to replace them with new members. The new members are drawn from both the primary and secondary market segments, however depending on the order of magnitude size of these potential market segments the "churn" in membership may be problematic in situations where the potential market segments are relatively small. For this reason a secondary market segment that is larger in size reduces the risk associated with membership retention and "churn".

Given the relatively small size of the potential secondary market segments for either adult or family membership in the Market Area, there is a relatively small “potential membership base” from which to draw new members to replace those that will not renew their membership, or who may cycle through membership status (those that join, then quit, then rejoin). In such a situation significant management and operations effort must be directed towards minimizing member attrition and improving member retention. There are a number of factors that can be addressed on an on-going basis that will assist with member retention:

- Member service - ensuring a high level of member service on an on-going basis has to be a priority
- Communicating and establishing the tangible value of membership in a meaningful manner
- Monitoring attendance (participation) and encouraging regular use and participation
- Providing an environment that supports and encourages social interaction among members and between members and staff
- Providing relevant and convenient services - ensuring that the programs and activities services are of interest and any potential barriers to participation among members is minimized (e.g. services are provided at convenient times)
- Following up with non-renewing members to identify potential barriers to membership/participation at the facility and addressing those that can be attributed to service provision (as opposed to barriers such as changes in a person’s health, as an example).

4.4.5 The Proposed Location in Exeter is Perceived to be Convenient

The survey results indicate that the location of the proposed multi-purpose community recreation centre is an important consideration in the decision to purchase a membership at the facility.

The survey results also indicated that Exeter is perceived to be a convenient location for the proposed multi-purpose community recreation centre and it is an important consideration in the decision to purchase a membership at the facility:

- The majority of the potential primary market segments for both adult and family membership and the largest proportion of total respondents and the potential secondary market segment for adult membership rated the level of convenience of a location in Exeter as “5” out of “5” or “extremely convenient”.

- The majority of the potential primary market segment for family membership and the largest proportion of the potential primary and secondary market segments for adult membership rated the level of importance of a location in Exeter to the decision to purchase a membership as “5” out of “5” or “extremely important”.

4.4.6 Potential Demand for Participation in Selected Activities

The research tested the potential level of interest in participating in specific activities proposed to be provided at the proposed multi-purpose community recreation centre. The proportion of respondents that comprise the potential primary and secondary market segments that indicated they were *very likely* to participate in an activity was extrapolated to the 2016 population of the Market Area 20-64 years of age to derive an estimate of the order of magnitude size of the total potential demand for each of the activities tested (Table 4.2 B).

The number of respondents that comprise the potential secondary market for family membership was not of a sufficient size to analyze the level of demand for participation in the selected programs and activities among this market segment.

It is important to note that the estimates of potential participants represent the total potential market and do not include consideration of the capture rates applied to the potential market segments. As such the number of program and activity participants from among the potential membership segments may be in the order of 40% to 50% of the total potential number of participants in each activity presented in Table 4.10.

The findings indicate that the activities of greatest interest among the potential market segments for membership among adults 20-64 years of age include *recreational swimming* and *walking or running indoors on a track*, followed by *the use of cardiovascular conditioning equipment, lane or lap swimming, aquatic fitness classes, any type of group exercise class* and *warm water therapy or rehab.*

Table 4.10: Potential Number of Total Participants in Activities – The Potential Market Segments

Program/Activity	Potential Number of Participants*			
	Primary Market Segment for Adult Membership at $54/Month	Secondary Market Segment for Adult Membership at $54/Month	Primary Market Segment for Family Membership at $115/Month	Total
Recreational swimming	600 – 850	150 – 315	505 – 775	1,255 – 1,940
Walking or running indoors on a track	600 – 850	120 – 260	490 – 750	1,210 – 1,860
The use of cardiovascular conditioning equipment	495 – 700	55 – 115	255 – 385	805 – 1,200
Lane or lap swimming	460 – 650	55 – 115	370 – 570	885 – 1,335
Aquatic fitness classes	460 – 650	135 – 290	385 – 595	980 – 1,535
Any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba	405 – 575	80 – 170	370 – 570	855 – 1,315
Warm water therapy or rehab	390 – 550	40 – 85	520 – 410	950 – 1,045
The use of weights or weight machines	300 – 425	55 – 115	285 – 440	640 – 980
Swim lessons or stroke improvement	250 – 350	–	355 – 540	605 – 890
Adult gymnasium sports	175 – 250	–	200 – 310	375 – 560

-- The proportion of respondents was not statistically significant.
* Numbers have been rounded to the nearest 5th.

4.4.7 Facility Components That May Optimize Membership Potential

The findings of the research identified that most of the facility components tested should be considered for provision in the proposed multi-purpose community recreation centre in order to maximize membership potential among the market segments for each type of membership. The survey findings related to the relative importance of factors to the decision to purchase a membership at the proposed multi-purpose community recreation centre and the likelihood of participating in selected programs and activities identified that the following components should be considered for the centre:

- An indoor pool - The provision of this facility was consistently rated as an important factor to the decision to purchase a membership at the proposed multi-purpose community recreation centre among the potential market segments for membership and many of the indoor aquatic programs/activities tested were among the activities with the greatest quantity of potential participants among the potential market segments for membership (i.e. recreational swimming, lane or lap swimming, aquatic fitness classes and warm water therapy or rehab).

- An indoor track - The provision of this facility was also consistently rated as an important factor to the decision to purchase a membership at the proposed multi-purpose community recreation centre among the potential market segments for membership and walking or running indoors on a track was among the activities with the greatest quantity of potential participants.

- A fitness conditioning centre - The use of cardiovascular conditioning equipment was among the activities with the greatest quantity of potential participants among the potential market segments for membership.

- A facility to support group exercise classes - “Any type of group exercise class such as yoga, pilates, tai chi, aerobics, spinning or zumba” was among the activities with the greatest quantity of potential participants among the potential market segments for membership. These types of activities can be accommodated in a multi-purpose room/studio or a gymnasium. However the findings of the research indicate that adult gymnasium sports were the least likely of all the activities tested to be participated in, which would suggest that the provision of a gymnasium should perhaps not be considered. Despite this finding, the provision of a gymnasium should be considered; the Municipality is considering the operation of the proposed multi-purpose community recreation centre by the YMCAs Across Southwestern Ontario and a gymnasium is typically an essential component of that organization’s service provision model.

4.4.8 Other Considerations

The findings of the research identified a further important consideration in the decision making process regarding the potential development of a new multi-purpose community recreation centre, potentially operated by the YMCAs Across Southwestern Ontario - the relatively low level of awareness of the YMCAs Across Southwestern Ontario and the programs and services provided among the potential secondary market segment for adult membership.

Although there is a level of awareness of the YMCAs across Southwestern Ontario and the programs and services provided among the potential primary market segments for adult and family membership within the Market Area, there is generally a lack of awareness among the potential secondary market segment for adult membership[2]. The proportion of the potential secondary market segment for adult membership that were “very aware” of the YMCA and the programs and services provided was not statistically significant and the majority (66%) were either “not very aware” or “not at all aware”; 36% were “somewhat aware”.

Efforts should be directed to improving the level of awareness of the YMCAs Across Southwestern Ontario and the programs and services they provide as well as the benefits and advantages of YMCA membership within the Market Area as a prerequisite to developing the market potential for adult membership in particular if the Municipality proceeds with the potential operation of the facility by the YMCA.

[2] Due to the relatively small size of the potential secondary market segment for family membership (i.e. 1.2% to 8.2% of total respondents) there was not a sufficient number of respondents to determine their level of awareness of the YMCAs Across Southwestern Ontario.