



Marketplace Intelligence

Updated Results: Area Resident Reaction to A New Community Center/YMCA in Rochelle

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Objectives

The primary purpose of this study is to provide unbiased data to the Flagg-Rochelle Community Park District, the Kishwaukee Family YMCA, the Rochelle Recreational Task Force, and the City of Rochelle regarding the scope of opportunities and challenges for expansion of healthy living facilities and programs within the City, including the possibility of opening of a new community center/YMCA. Specifically, this research estimates membership demand (in member units) and program participation for the proposed community center.

This research is an update to the report issued by PB&A in July of 2014. Here, the concept of a community center/YMCA without an aquatics component is tested at three membership price points.

The 2014 research is much more comprehensive in scope, but tested a facility with an indoor pool and aquatics programming. Readers are encouraged to review this early research when considering the findings presented here.

Study Approach

Single Phase: Completion of 200 telephone interviews with a random sample of area residents who live within the estimated primary market area of the proposed new community center/YMCA. The primary market area is composed essentially of all the households within a seven zip code polygon (61068 Rochelle, 61006 Ashton, 60553 Steward, 61031 Franklin Grove, 60113 Creston, 61020 Davis Junction, 61061 Oregon).

The overall error range for this phase is $\pm 5.0\%$ at the 95% confidence level.

The calling plan is essentially identical to what was used in 2014 and was designed so that every telephone household, regardless of whether or not a number is listed, had an equal probability of being included in the study.

PB&A attempted five callbacks before replacing a household selected for inclusion in the sample with another home. All interviewing was completed on weekday evenings between the hours of 5PM and 8PM, as well as during the daytime on one weekend. PB&A utilized a multilingual and multi-cultural interviewing team and as such, within reason, respondents were able to participate in their language of first choice.

Findings and Conclusions

I. Reaction to Opening a YMCA in Rochelle

- In both July 2014 (69%) and January 2015 (67%), two thirds of those area residents polled on a random basis, believe that opening a new community center in Rochelle as a branch of the Kishwaukee Family YMCA is either a good or excellent idea.

Reaction to Opening a YMCA in Rochelle

	July 2014 (%)	January 2015 (%)
Excellent	26	24
Good	43	43
Fair	24	24
Poor	4	6
Very poor	2	3

Base: 2014 (400).
2015 (200).

Question: As you may know, some consideration is being given to opening a new community center in Rochelle as a branch of the Kishwaukee Family YMCA. This YMCA would offer a wide range of interesting and fun healthy living and social programs for people of all ages. In your opinion is opening a new YMCA/community center in Rochelle a(n) _____ idea?

II. Convenience of Potential Locations

In both waves of interviewing, area residents were asked to indicate how convenient locating the new community center/YMCA near the high school or at the Helms Sports Complex would be for usage by members of their household.

- In the July 2014 data, both locations appear to be convenient to similar percentages of area residents.
- In the information gathered in 2015, the site near the high school is rated very convenient by a greater percentage (40%) than is the sports complex location (26%).
- In the price elasticity analysis that follows the importance of this difference can be seen in terms of the percentage of residents claiming to be likely to join the community center/YMCA at each of three price levels.

Convenience of Potential Locations

	HIGH SCHOOL		SPORTS COMPLEX	
	2014 (%)	2015 (%)	2014 (%)	2015 (%)
Very convenient	31	40	30	26
Somewhat convenient	40	38	45	48
Not very convenient	14	13	14	18
Not at all convenient	14	10	11	9

Base: 2014 (400).
2015 (200).

Question: One location being considered for the new YMCA is near the high school and the new Lincoln School. Overall, how convenient is this location for you and other members of your household?

A second site being considered for the new YMCA/Community Center is at the Helms Sports Complex, near Walgreens and McDonalds. Overall, how convenient is this location for you and other members of your household?

III. Price Elasticity of Demand: Two Locations – New Descriptions/No Pool

In the 2014 research, the concept tested for the community center/YMCA included a reference to an indoor aquatics component to the community center/YMCA. In the 2015 study, the concept statement was re-written. Any mention of an indoor pool was removed, and the overall description was for a more modest offering.

Respondents were read the new concept statement and asked how likely they would be to join if family membership cost \$59 a month and individual membership cost \$39 a month. This question was asked independently for a community center/YMCA located near the high school, and for a similar facility at the Helms Sports Complex.

- At monthly rates of \$59/\$39, 4% of area residents claim to be very likely to join a YMCA near the high school and only 1% should the new community center be built at the Helms Sports Complex.
- At rates of \$59/\$39 for a new community center/YMCA near the high school, this data conservatively translates to approximately 171 member units (In YMCA “speak”, a member unit is equal to a household regardless of the number of people within the household.) joining within the first 12 months.
- A new Y at the sports complex will draw significantly fewer members at rates of \$59/\$39. PB&A conservatively projects only 43 member units within the first twelve months
- If the monthly cost of membership to the new community center/YMCA, without an indoor pool, is \$49/\$29, approximately 384 member units can be expected in the short run at the high school site. For comparative purposes, this is approximately 50% of what was projected in 2014 for a YMCA at this location if indoor aquatics were included.
- At the Helms Sports Complex, the projection is for 213 member units in the short run if monthly fees are \$49/\$29.
- At the lowest tested rates of \$39/\$25, 682 full pay member units are conservatively projected during the initial 12 months for a community center/YMCA near the high school. This is for a YMCA that does not include an indoor pool or any other aquatics component.
- At the Helms Sports Complex, at \$39/\$25, approximately 342 member units can be conservatively estimated within the initial 12 months.

When Is YMCA Membership Affordable?

	High School (%)	Sports Complex (%)
\$59/\$39		
Very likely	4	1
Somewhat likely	15	15
\$49/\$29		
Very likely	9	5
Somewhat likely	18	13
\$39/\$25		
Very likely	16	8
Somewhat likely	15	18

Base: Total area resident sample (400).

Question: How likely is it that you will join the new YMCA in Rochelle at the Helms Sports Complex, if a family membership including all children costs \$59 per month and a single membership costs \$35 a month? Are you [READ SCALE] to join this new YMCA?

How likely is it that you will join the new Y at the Helms Sports Complex, if a membership for a family including all children costs \$49 per month, and a single membership costs \$29 a month?

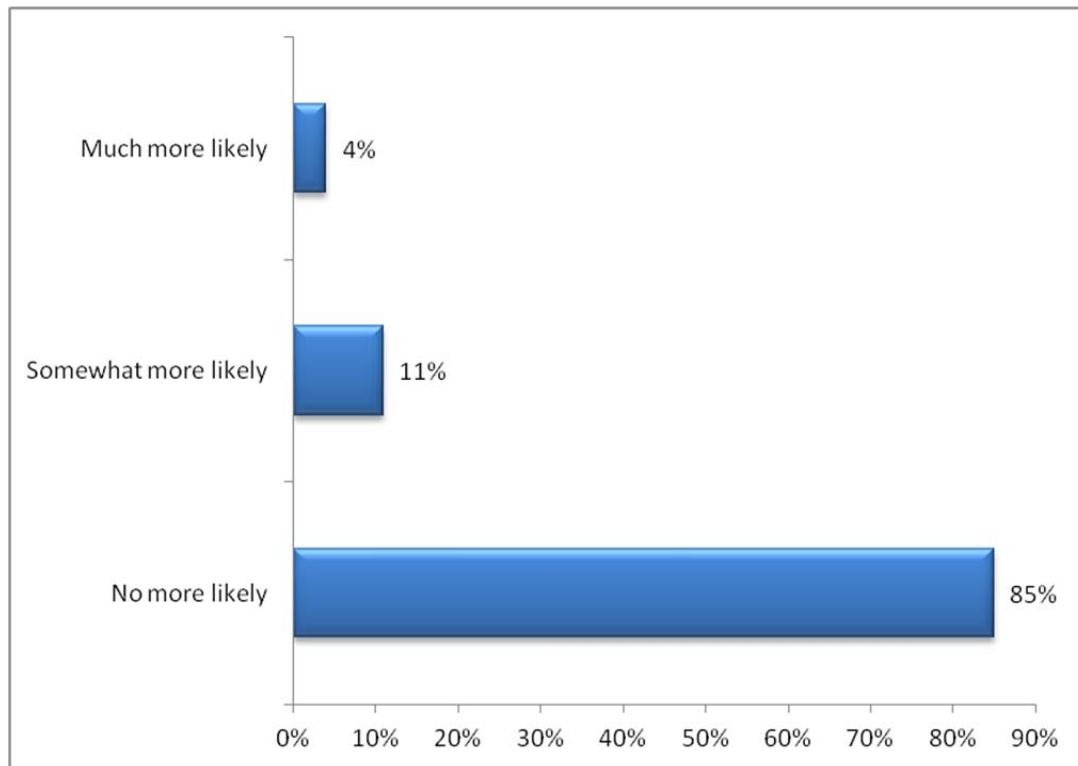
How likely is it that you will join the new Y at the Helms Sports Complex in Rochelle, if a membership for family costs \$39 per month and a single membership costs \$25?

IV. Impact of Access to Aquatics

Respondents were next asked if they would be willing join the new community center/YMCA and pay an additional \$10 per month if membership also included access to the pools and aquatics programming at both the Kishwaukee Family YMCA in Sycamore and the Barb City Y in DeKalb.

- It is estimated that this may lead to approximately an additional 80 member units if the new Y opens at the high school at monthly membership fees of either \$49/\$29 (75 additional member units) or \$39/\$25 (83 additional member units).
- If the new Y opens at the Helms Sports Complex, relatively similar, but more subdued additional membership can be anticipated with this aquatics offering. That is, at the sports complex, if it costs \$10 more per month for access to Kishwaukee Family YMCA and Barb City YMCA aquatics, approximately 45 incremental member units are projected at \$49/\$29 and 54 additional member units at \$39/\$25.

Impact of Access to Aquatics for \$10 More Per Month

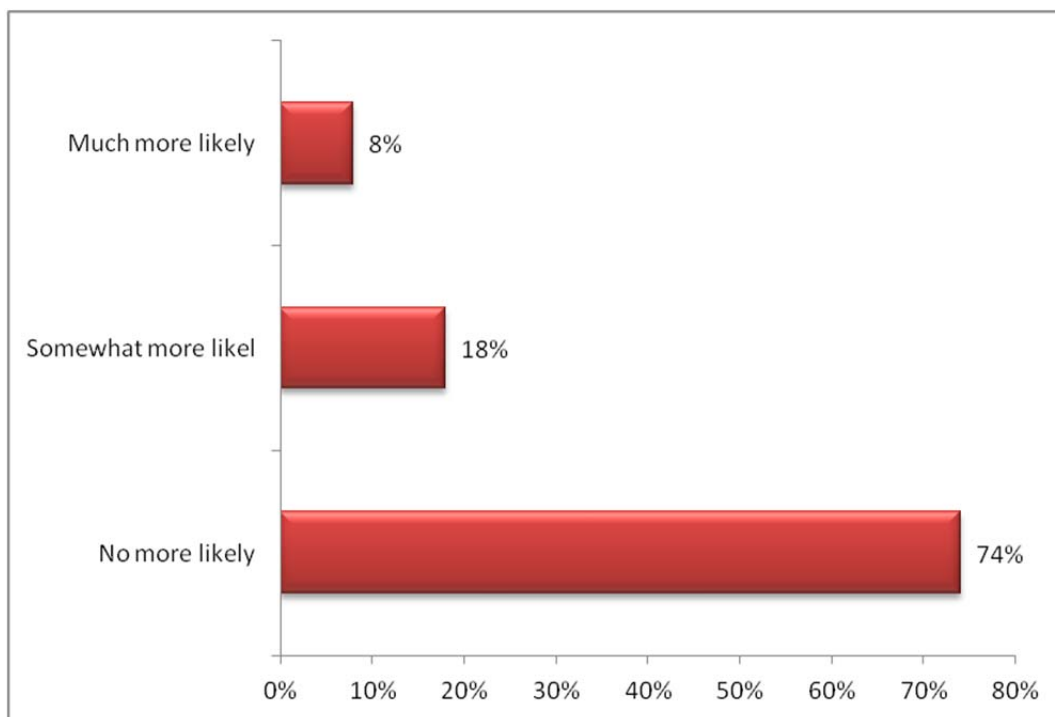


Base: Total sample (200).

Question: For an additional \$10 per month, members of the Rochelle YMCA can also have unlimited access to the pools and all other facilities and classes at the Kishwaukee Family YMCA in Sycamore and the Barb City Y in DeKalb. Does access to the pools and all other programs and facilities at the Kishwaukee Family YMCA and Barb City YMCA for an additional \$10 per month cause you to be **SCALE** to join the new Rochelle YMCA?

- If the access to the pools and aquatics programming at the Kishwaukee Family YMCA and Barb City YMCA are included at no additional cost to members of the new Rochelle Community Center/YMCA, it is estimated that 160 more area households are likely to join. Again, this increase is fairly consistent at monthly rates of either \$49/\$29 (155 member units) or \$39/\$25 (164 member units).

Impact of Access to Aquatics – No Additional Charge



Base: Total sample (200).

Question: Suppose that there is no additional fee for unlimited access to the Kishwaukee and Barb City YMCAs if you join the new Rochelle YMCA. That is, full access to these two YMCAs would be included in your Rochelle YMCA membership. Does access to the pools and all other programs and facilities at the Kishwaukee Family YMCA and Barb City YMCA for no additional cost cause you to be **SCALE** to join the new Rochelle YMCA?