A graphic illustration on the left side of the page shows a grey hand holding a magnifying glass over a cluster of colorful gears (red, orange, yellow, green, blue, grey) of various sizes. The background is a light grey gradient.

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

May, 2015

Prepared by: Constance Miller & John Perdue

## Purpose and Methodology

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

Feasibility study specifically scoped to include:

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

National call center approach:

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



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

*"My best analysis leads me to more questions"*



## Market Area Demographics & Psychographics

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

### Market Profile

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

### Tapestry Segmentation

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

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

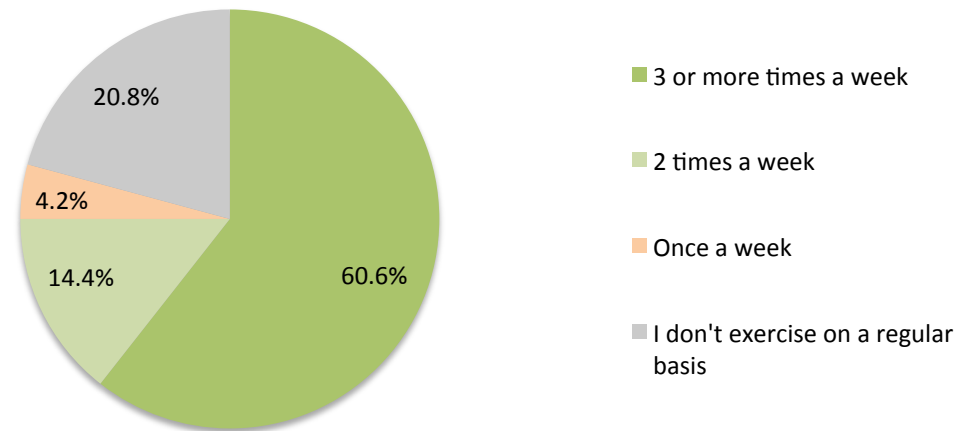


## Current Exercise Habits

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

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

% of Exercise Per Week

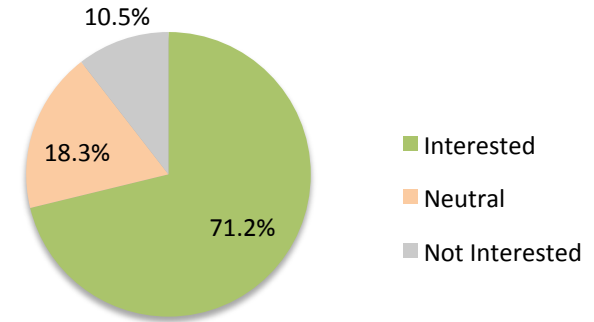


## Demand for Programs and Facilities

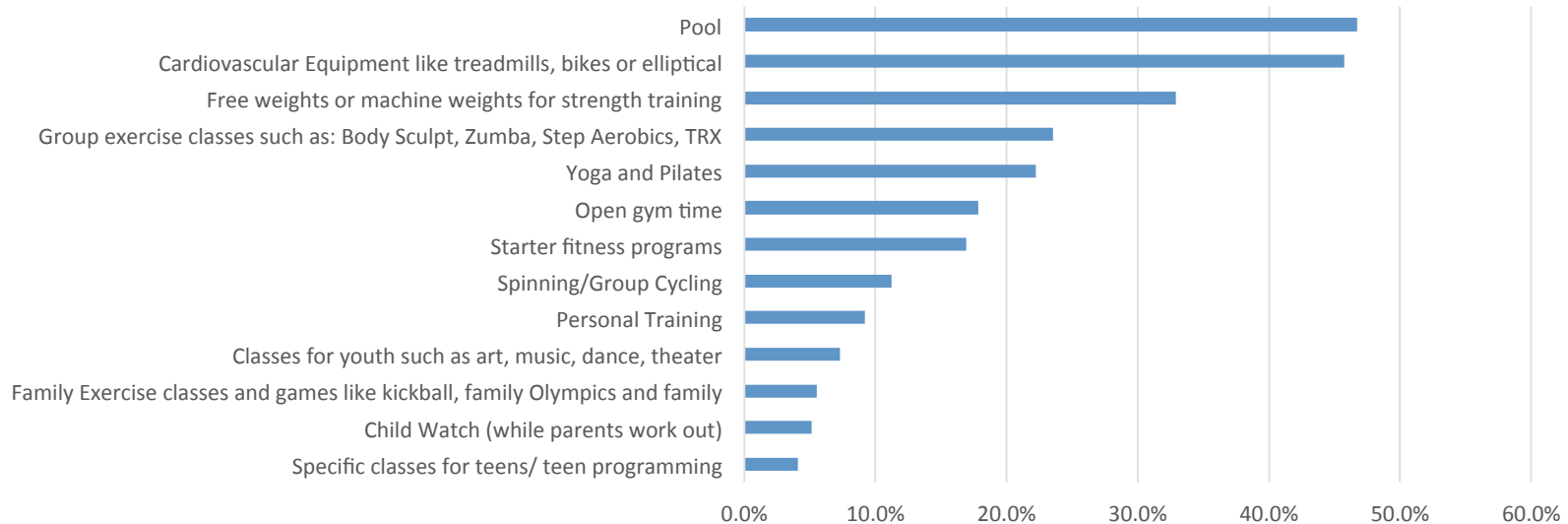
When asked about the likely frequency of use, respondents indicated a "pool" (46.7%) and "cardiovascular" (45.7%) exercise to be the of most interested at a potential Tigard YMCA.

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

% with those with children interested in using the Y



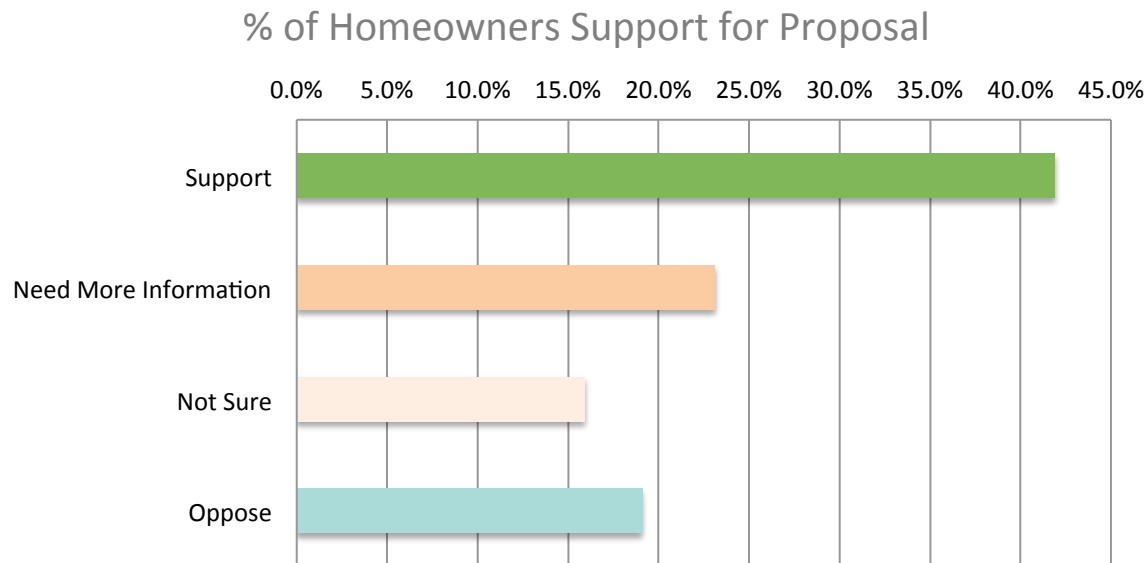
Would use often...



## Financial Support for New Facility

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

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

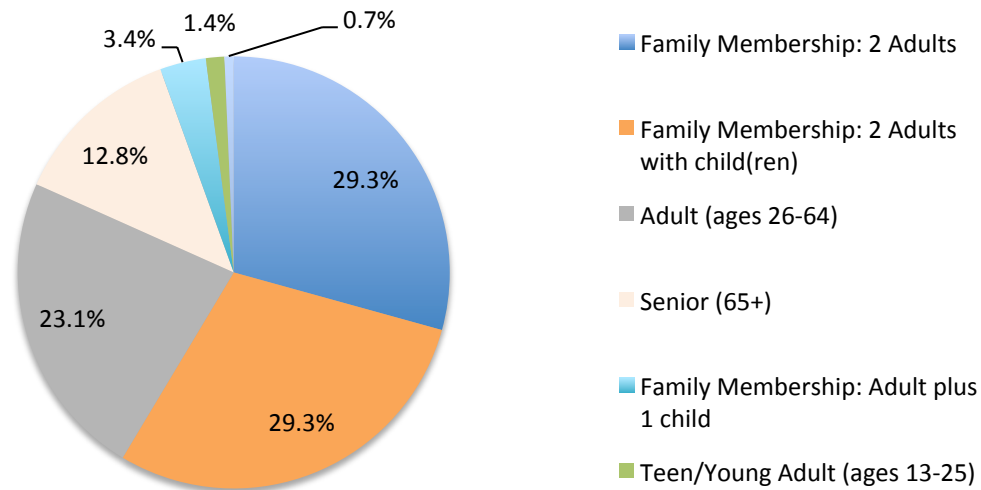


## Membership Demand

The most commonly selected membership types reported:

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

% Interest in Membership Types



## Membership Forecast

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

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

\*the lowest price point = outlier

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



## Recommendations

Based on study results ...

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



## Parking Lot



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

*“My best analysis leads me to more questions”*

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

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

