

## SUMMARY REPORT

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 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 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.

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.

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.

### SURVEY RESULTS HIGHLIGHTS

#### ➤ *The Potential Market for Adult and Family Membership*

The results of the research identified that:

- 20.1% of respondents 20-64 years of age prefer adult membership and are *very likely* to purchase an adult membership at \$54/month and 9.8% of respondents prefer adult membership and are *somewhat likely* to purchase an adult membership at \$54/month. They comprise the total potential primary and secondary market segments for adult membership.
- 16.9% of respondents 20-64 years of age prefer family membership and are *very likely* to purchase a family membership at \$115/month and 4.7% of respondents prefer family membership and are *somewhat likely* to purchase a family membership at \$115/month. They comprise the total potential primary and secondary market segments for family memberships.

These results were 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 and secondary market segments for adult and family memberships. A "capture or conversion" factor was then applied to the total potential primary and secondary market segments to derive a projection of the order of magnitude total number of potential adult and family memberships that may be realized among adults 20-64 years of age based on the monthly fees tested.

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 findings of market research may be in the order of magnitude of between 970 to 1,655 memberships.

### **OTHER KEY FINDINGS**

- The research identified a significant level of interest in participation at the proposed facility on a membership basis.
- 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 and Exeter is perceived to be a convenient location for the proposed multi-purpose community recreation centre.
- The survey 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*.
- The findings of the research identified the following as key components for the centre:
  - An indoor pool
  - An indoor track
  - A fitness conditioning centre.
  - A facility to support group exercise classes