



Gulfport + Surrounding Area Mississippi Community Feasibility Analysis

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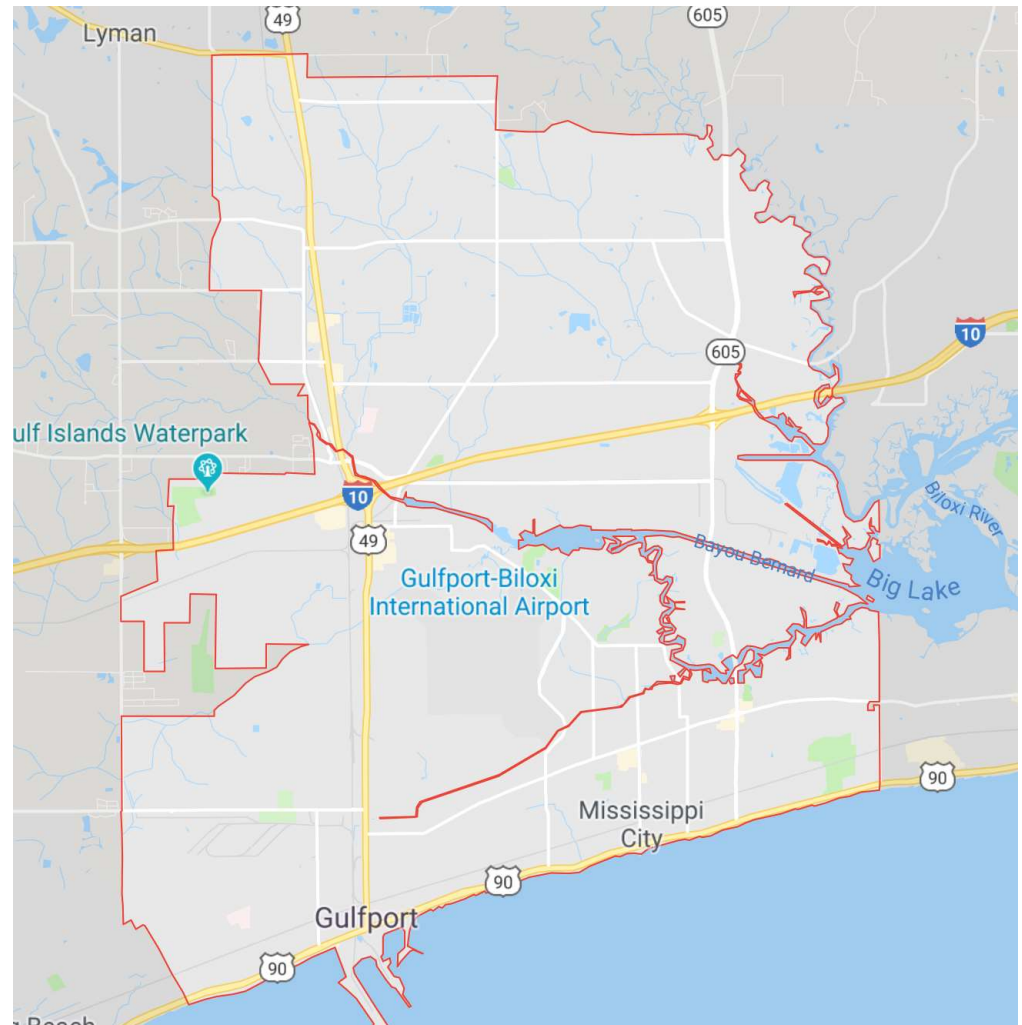


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BACKGROUND & METHDOLOGY

BACKGROUND / METHODOLOGY:

Background:

After, conducting the initial demographic assessment of the Gulf Coast area, the region is viable and can support a YMCA (size of bldg. to market size critical factors). The next phase of the process is to understand the wants and needs of the market that will further confirm the sustainability of the location and assist in proforma development as it pertains to aligning the operations to the programs and services the market wants / needs.

Ultimately, this methodological approach proposed in this document will provide MS Gulf Coast YMCA with insights needed to confidently make decisions regarding their expansion efforts.

Methodology:

We propose using an **online quantitative** survey methodology to conduct the market research study verse other methods such as telephone, mail or the combination of the two.

An online methodology is designed nicely for this type of market research study and based on my years of experience provides the perfect format to deliver on the objectives related to this project.

- 1) Gathering insights from the NON-Y Community efficiently and effectively. (receive a blind survey)
- 2) Allows for effective choice modeling (conjoint methodology) questioning to accomplish core aspects of MS Gulf Coast YMCA core objectives
- 3) Reduces response bias from interviewer questioning process
- 4) Saves client time and money, while also enhancing the analysis process

An online approach allows for dynamic way of testing consumer responses on such factors of choice selection analysis (critical in price modeling) as well as attribute testing.

METHODOLOGY cont.

Survey Length and design: The survey will take between 10 to 15 minutes to complete and contain a combination of open-ended and closed ended selections based on the insights we wish to derive from the responses to accomplish our objectives.

The open-ended questions are specifically designed to solicit additional insights by allowing the respondents to expand on their variable selections.

The verbatims provided will also enhance the reporting process by providing additional insights and bring the emotions behind the responses to light while bringing an overall deeper meaning to the process.

There will be two surveys to support delivering on the objectives:

- ☐ **Survey I:** Non-YMCA Member– will be receiving a **Blind Survey** (they will not know the YMCA is the client) to avoid bias in their responses based on perception or other factors that can influence choice selection.

This blind methodology provides more accurate assessments related to the core objectives outlined in the RFP which include but not limited to the following:

- Sustainability of a new YMCA facility
- Demand projections of adult and family membership units
 - Factors that motivate behavior / Lifestyle and Life Stage correlations to choice
 - Perception / Awareness factors (awareness and perception factors impact demand (positively / negatively))
 - Data Segmented by core audience groups: Families, Seniors and Youth
- Membership Pricing / Value Factoring
- Consideration Factors / Relevancy of the Y Brand
- Programming, Services and features needed to attract and retain members
 - The design allows to go deeper than merely checking a box but understanding the psychology behind the choice (i.e. socialization (meet new people, opportunity, family togetherness, health, break from life, etc.))
- Community support / donation potential

METHODOLOGY cont.

- ❑ **Survey 2:** YMCA Member and Program Participants, which **WILL NOT** be Blind. However, they will serve as a baseline to the non-member responses on the factors outlined above.

The sample plan as outlined below will provide a assessment of those not currently affiliated with the YMCA (Cell I – Non-Member) along with current members / program participants and past members of the YMC (Cell II and III).

The results of the sampling used within the analysis:

Cell I: (n=148) *Non-YMCA Members (Non-Y Community)*

Cell II: (est. n=485) - Active YMCA Gulf Coast Members, Program Participants and Past members.

Note: most of the analysis is based Y – Members, however where appropriate program participants were included. The response rate for Past Members was too low to be included in the analysis and were excluded from this report to ensure no bias of results happened.

Important Note: Cells I will receive a “**blind survey**” so they will NOT know that the YMCA is the client and no branding will be tied to this survey that will allow them to know that the Y is the sponsor of the research. This approach reduces the level of bias about the Y, positively or negatively, in the responses received from the research.

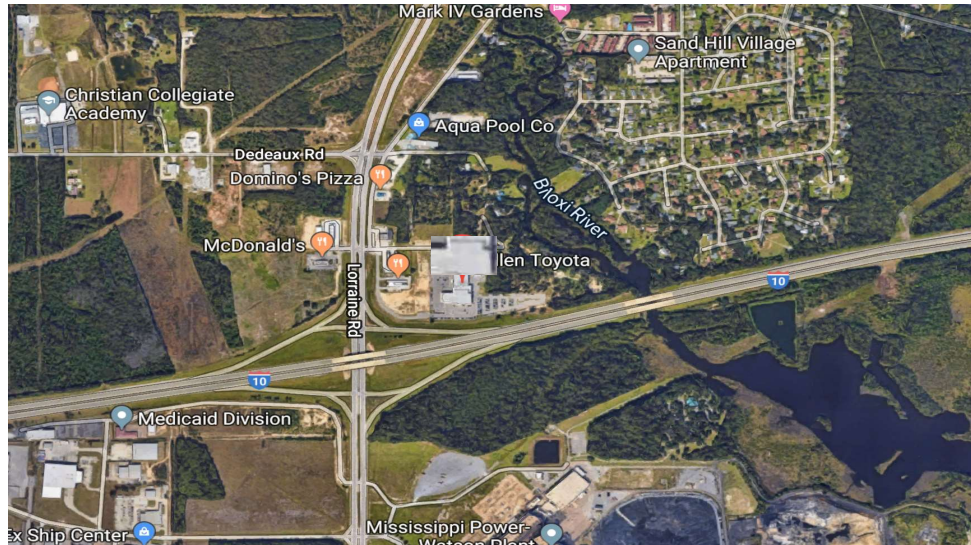
Analytical Notes:

- Data highlighting the demographics of the market were reflected in phase I reporting and pulled into this report to provide further context to the findings developed on the Gulfport region overall.
- The Non-Y sample covered an area larger than the Gulfport region, achieving a total sample of (n=485). The additional can be used for insights regarding areas outside of the Gulfport area and current Ocean Springs regions.



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY



Overall, the Gulfport, MS community is a viable option for the Gulf Coast YMCA to increase its reach and access and bring the Y's programs and services to a community it serves with an anticipated # of member units it can reach is to be between 3,971 – 4,633, with a phase I build not to exceed 50K sq. ft., specially at the I-10 / 605 E location.

Overall, the societal issues identified as well as those presented from secondary resources (obesity, senior and youth isolation, juvenile and adult crime) makes the Y a unique entity, a catalyst to assist in reducing the impact these issues have on this community.

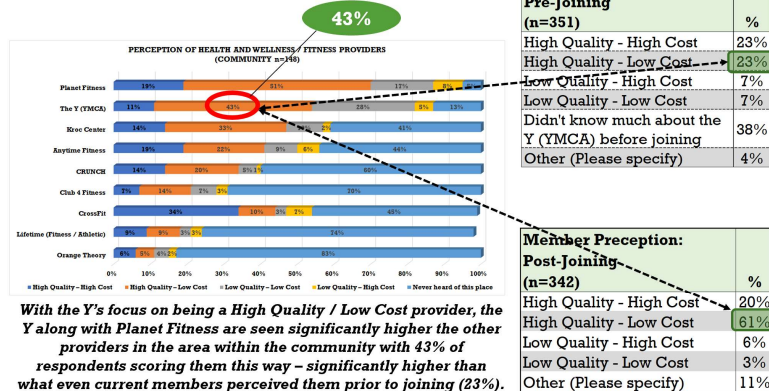
Rank	Societal Issue	COMMUNITY (n=148)
1	Adult Crime	43%
2	Poverty	42%
3	Lack of Quality Education	34%
4	Homelessness	33%
5	Juvenile Crime	31%
6	Opioid Addiction	27%
7	Lack of Skilled / Technical Labor Force	20%
8	Childhood Obesity	18%
9	Senior Social Isolation	13%
10	Other (Please specify)	9%
11	Chronic Diseases	8%

Rank	Societal Issue	MEMBER (n=260)
1	Childhood Obesity	41%
2	Chronic Diseases	31%
3	Poverty	30%
4	Homelessness	27%
5	Opioid Addiction	25%
6	Lack of Quality Education	20%
7	Senior Social Isolation	18%
8	Juvenile Crime	17%
9	Adult Crime	13%
10	Other (Please specify)	13%
11	Lack of Skilled / Technical Labor	10%

EXECUTIVE SUMMARY

PERCEPTION – Health and Wellness Providers

(High Quality / Low Cost)



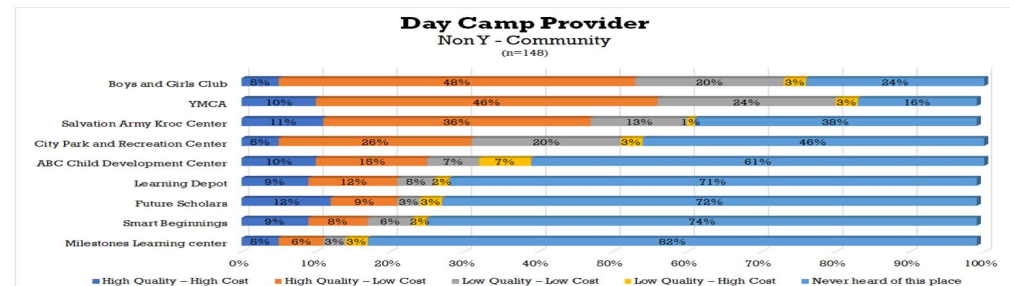
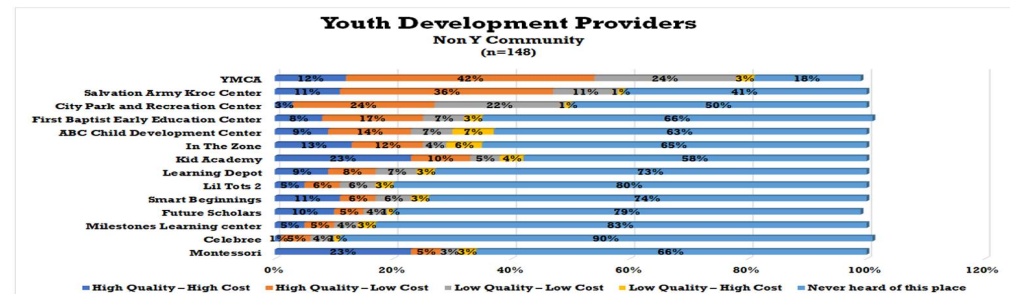
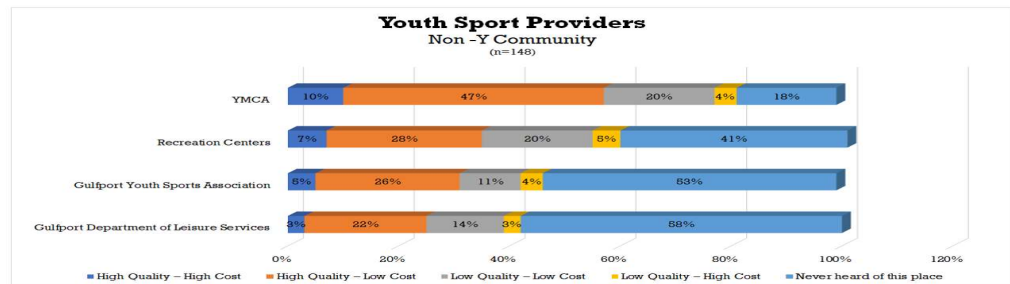
Sixty-one percent of current members see the Y as a High Quality / Low Cost Provider. A significant increase over their Pre-Joining rating.

The YMCA is overall perceived well within the community, especially in our core positioning as a High Quality / Low Cost, is also perceived as a High Quality / Low Cost provider in both Health and Wellness and Youth Development categories tested, highlighting a reputation that is welcoming to the Gulfport community.

This is an important point, as the exploration both in the Gulfport area among other the Y's reputation is strong and is a highly considered entity in the community.

Overall, perception ratings are strong in this area and significantly higher than what current members indicated prior to them joining the Y.

This high perception, typically leads to strong consideration indicated in the chart to the right, where planet fitness is considered significantly higher than other health and wellness / fitness entities in the area.

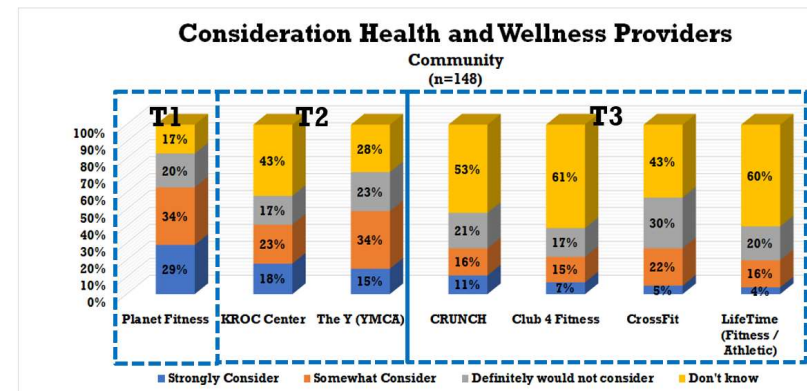


EXECUTIVE SUMMARY

Overall, the relatively high perception ratings, usually correlate to high consideration. As we see below, this holds true as the Y is a highly considered entity for both Health and Wellness and Youth related programming with Preschool being a notable exception.

Rank	PRE-SCHOOL	%	Rank	BEFORE AND AFTER SCHOOL	%	Rank	YOUTH SPORTS	%
1	Local Church / Place of Worship	13%	1	Boys and Girls Club	14%	1	City Parks and Rec Centers	18%
2	ABC Child Development Center	12%	2	YMCA	12%	2	YMCA	16%
3	Montessori	9%	3	Local Church / Place of Worship	11%	3	Local Church / Place of Worship	11%
4	Smart Beginnings	9%	4	Salvation Army Kroc Center	9%	4	Salvation Army Kroc Center	10%
5	Kid Academy	8%	5	City Parks and Rec Centers	7%	5	Gulport Department of Leisure Services	9%
6	Lil Tots 2	8%	6	Future Scholars	6%	6	Boys and Girls Club	7%
7	Milestones Learning Center	7%	7	In the Zone	6%	7	In the Zone	5%
8	YMCA	6%	8	Montessori	5%	8	Future Scholars	4%
9	Learning Depot	5%	9	Gulport Department of Leisure Services	5%	9	Kid Academy	4%
10	Future Scholars	5%	10	Kid Academy	5%	10	Learning Depot	4%
11	Boys and Girls Club	4%	11	ABC Child Development Center	5%	11	Montessori	3%
12	Salvation Army Kroc Center	4%	12	Learning Depot	3%	12	Milestones Learning Center	2%
13	In the Zone	4%	13	Milestones Learning Center	3%	13	ABC Child Development Center	2%
14	City Parks and Rec Centers	3%	14	Smart Beginnings	3%	14	Lil Tots 2	2%
15	Celebree	2%	15	Lil Tots 2	2%	15	Smart Beginnings	1%
16	Gulport Department of Leisure Services	1%	16	Celebree	2%	16	Celebree	1%

Rank	DAY CAMP	%	Rank	OVERNIGHT CAMP	%
1	Local Church / Place of Worship	16%	1	Local Church / Place of Worship	27%
2	YMCA	13%	2	Salvation Army Kroc Center	14%
3	Boys and Girls Club	12%	3	YMCA	11%
4	Salvation Army Kroc Center	12%	4	Boys and Girls Club	8%
5	City Parks and Rec Centers	7%	5	City Parks and Rec Centers	6%
6	In the Zone	6%	6	Future Scholars	6%
7	Gulport Department of Leisure Services	5%	7	Kid Academy	6%
8	Kid Academy	5%	8	Celebree	5%
9	Montessori	4%	9	Gulport Department of Leisure Services	4%
10	Milestones Learning Center	4%	10	In the Zone	3%
11	Future Scholars	4%	11	Smart Beginnings	2%
12	ABC Child Development Center	3%	12	Milestones Learning Center	2%
13	Learning Depot	3%	13	Montessori	2%
14	Smart Beginnings	2%	14	ABC Child Development Center	1%
15	Lil Tots 2	2%	15	Lil Tots 2	1%
16	Celebree	1%	16	Learning Depot	0%



Perception and ultimately consideration is strongly influenced by a top-of-mind identification of entities once a need / interest is identified by the consumer. The unaided response collected strongly highlights a need for increase awareness and perhaps ultimately a further understanding of what makes the Y different than others in the community, i.e. Planet Fitness, Kroc Fitness center. Among Youth programming areas, this correlation continues to hold true when comparing consideration rankings to unaided awareness levels.

Y Categories	Y - Unaided Awareness	Top "Like Provider"	Unaided Awareness
Health and Wellness	5%	Planet Fitness	29%
Sports	6%	Park and Rec	6%
Before and Afterschool	11%	Boys and Girls Club	10%
Community Center	9%	Boys and Girls Club	3%
Day Camp	10%	Churches / Religious Entities	7%
Preschool	1%	Churches / Religious Entities	10%
		Head Start	10%

EXECUTIVE SUMMARY cont.

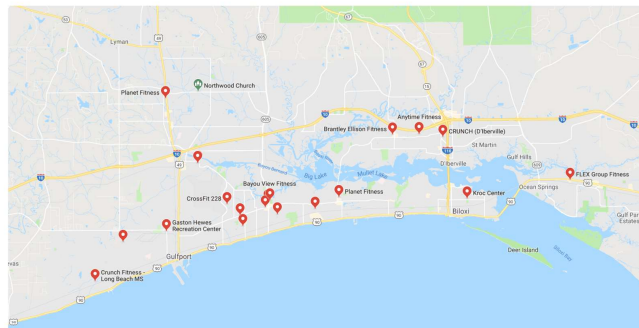
DEMOGRAPHICS / MARKET LANDSCAPE:

Overall, the total population and household population size and growth is large enough to sustain an entity in this location.

To areas to note is over 1/10 (15% - 16%) of the market being single parents and about the same % residing in poverty, making this market ideal to service the Y's mission, while ensuring margin and sustainability metrics can be achieved and self sustaining.

GULFPORT – Like Providers

(H&W LIKE PROVIDERS – Within – 15 minute drive time of proposed sites)



Full H&W Center
☐ Planet Fitness (2-locations)
☐ Anytime Fitness
☐ Kroc Center
☐ CRUNCH

Specialty
☐ Gulfport CrossFit
☐ Wolfpack Athletics
☐ Fitness Center
☐ Iron Works Gym
☐ Yoga Barre
☐ Crunch Fitness
☐ Brantley Ellison Fitness

Specialty
☐ CrossFit228
☐ Rhodes Club Fitness
☐ CrossFit Portside
☐ Francis X Collins
☐ Bayou View Fitness
☐ Club4Fitness

Specialty
☐ Gaston Hewes Recreation Center

Popoulation	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
2010	70,898	154,155	63,091	148,367	58,778	143,613
2018	78,557	170,346	69,451	164,399	65,472	159,700
2023	81,189	175,993	71,761	169,884	67,691	165,098
Pop. Growth (2018/2010)	11%	11%	10%	11%	11%	11%
Pop. Growth (2023/2018)	3%	3%	3%	3%	3%	3%

Household Population	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
2010	28,109	59,266	25,180	57,348	22,281	55,584
2018	31,424	66,191	28,033	64,242	25,030	62,345
2023	32,641	68,766	29,122	66,748	26,005	64,776
HH Pop. Growth (2018/2010)	12%	12%	11%	12%	12%	12%
HH Pop. Growth (2023/2018)	4%	4%	4%	4%	4%	4%

Family Dynamics	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Married w/ Children under 18	18%	18%	15%	18%	19%	19%
Single Parent w/ Children under 18	15%	16%	17%	16%	18%	16%
Non-Family w/ Children under 18	0%	0%	0%	0%	0%	0%
Married w/o Children under 18	24%	23%	21%	23%	23%	25%

Population in Poverty	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
% in Poverty	15%	18%	22%	18%	19%	17%

Although the market does have a degree of like providers, the YMCA is still perceived as a High Quality / Low Cost Provider and is considered favorably for joining if/ when the community is in the market for a health and wellness organization.

The YMCA along with two other entities are viewed as the only entities that can produce a state-of-the-art health and wellness to the community of Gulfport,

EXECUTIVE SUMMARY cont.

Mississippi Gulf Coast YMCA			
2020 PROPOSED PRICING STRUCTURE			
	2019	var	2020
SINGLE ADULT	\$39	\$2	\$41
FAMILY	\$59	\$2	\$61
YOUTH	\$15	\$1	\$16
SENIOR SINGLE	\$35	\$1	\$36
SENIOR COUPLE	\$49	\$2	\$51

Although raising rates on seniors, based on the model should not have a negative impact on new member acquisition another options by may to lower rates of senior single by \$1 (\$34) and keep Senior Couple the same – the growth in volume anticipated (seniors stay longer) should increase revenue overall...this assume it is part of a comprehensive strategy to promote the value of the Y and its differentiators in the market.

Adding Membership Types to Serve the Community & Increase Value

**Single Parent
(1 – Adult No
Dependents)**

Rate: \$52 / mo.
(more analysis is needed to
determine exact rate)

**2 – Adults
No Dependents**

Rate: \$54 / mo.
(more analysis is needed to
determine exact rate)

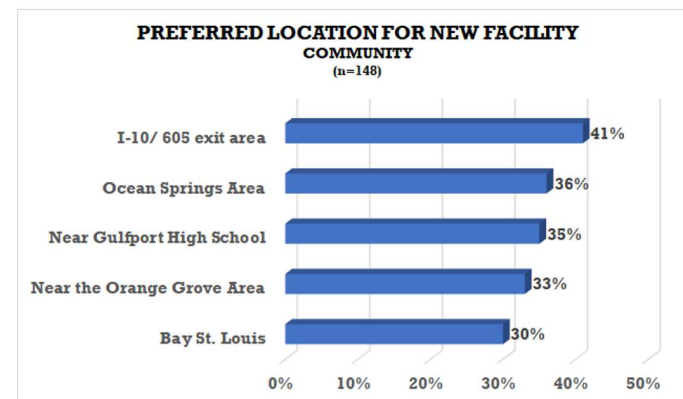
As highlighted above, price aligned with convenience increase consideration once a need has been identified by the consumer. The results from the research highlight that the I-10 / 605 exit area provides this convenience elements and further highlights the viability of a Y in Gulf Port, MS.

Also, with the majority of respondents travelling less than 15 minutes to work, the convenience factors is heightened as well as the need for programming available before during and after normal work hours.

In addition to convenience, price is a critical deciding factor when someone is considering to join a health and wellness organization. The suggested adjustment to MS Gulf Coast membership rate combined with the additional membership types (Single Parent and 2 – Adult no Dependents) align with community needs, opens up more opportunity for consideration and aligns with the High Quality / Low Cost Option.

This rate and membership structure, combined with a marketing and operational changes outlined in this deck will assist in increasing new member acquisition supporting long-term sustainability and relevancy factors.

The rate and membership shifts will only go so far in creating this sustainability, relevancy paradigm. Critical factors as seen in the next set of slides will allow VALUE to be achieved in offering programs and services aligned to increase value and provide a differentiation between the Y and other providers currently listed in the consideration and top –of-mind awareness levels among the Non-Y Community.



EXECUTIVE SUMMARY cont.

Price and convenience assists in developing consideration factor, but the amenities offered assist in promoting differences between the Y and the like providers in the area.

One of the most important request from both Community and Members are the need for Non-Physical programs and services. Enrichment and programs that promote being social.

Fitness Related Programs	Community (n=146)
Weightloss Program	44%
Personal Training Options	41%
Nutrition Classes	34%
Senior Specific Fitness Classes	30%
Group Exercise Classes	28%
Pool Specific for Aquatics Program	22%
Swim Lessons (Adult and Youth)	20%
Summer Day Camp Activities	16%
Not Interested in Fitness and Health Programs	15%
Family Personal Training Classes	10%

T1

Fitness Related Programs	Member (n=214)
Nutrition Classes	38%
Weightloss Program	34%
Group Exercise Classes	29%
Family Personal Training Classes	21%
Personal Training Options	18%
Senior Specific Fitness Classes	17%
Pool Specific for Aquatics Program	13%
Summer Day Camp Activities	9%
Swim Lessons (Adult and Youth)	6%
Not Interested in Fitness and Health Programs	5%

T1

Non-Physical Activities	Community (n=147)
Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	55%
Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	33%
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	28%

Non-Physical Activities	Member (n=214)
Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	58%
Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	35%
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	32%

Among both the Community and current members of the Y, Adult Enrichment Classes are indicated as a primary desire to have at the new location.

AMENITIES DESIRED

Amenities Desired:	COMMUNITY (n=146)
State of the art fitness equipment	46%
Indoor Pool	45%
Therapy Pool	32%
Food Court / Food Options Available	31%
Gymnasium	26%
Outdoor Pool	23%
Kid friendly pool	22%
Family Room (large TV, comfortable couches and chairs, etc.)	22%
Game Room (pool table, ping pong, x-box, Playstation)	21%
Family Pool Area (Slides and Games)	20%
Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	18%
Eating / Gathering Area (bring your own food in to eat with friends)	18%
Place my young child can go while I workout	17%
Lap Pool / Competitive Swim Pool	15%
Computer Lab / Workstation	15%
Teen Center	12%
Virtual (VR - technology) Fitness Equipment	11%
Rock Climbing Wall	11%
None of the above	10%
Competitive Swim (High School Swim Teams)	4%

T1

T2

T3

When examining the Amenities desired among both the Community and Current Members we see the following emerge as top attributes desired:

- ☐ State of the Art Equipment
- ☐ Food Court
- ☐ Kid Friendly Pool
- ☐ Indoor / Outdoor Pool
- ☐ Therapy Pool

Note: Members were asked to focus on amenities that currently they do not participate in at the Y

- ☐ Chef's Kitchen
- ☐ Rock Climbing Wall

Amenities Desired:	MEMBER (n=224)
Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	47%
Rock Climbing Wall	35%
Family Pool Area (Slides and Games)	29%
Food Court / Food Options Available	27%
State of the art fitness equipment	25%
Gymnasium	20%
Therapy Pool	17%
Kid friendly pool	13%
Teen Center	13%
Virtual (VR - technology) Fitness Equipment	13%
Game Room (pool table, ping pong, x-box, Playstation)	11%
Computer Lab / Workstation	11%
Eating / Gathering Area (bring your own food in to eat with friends)	10%
None of the above	10%
Family Room (large TV, comfortable couches and chairs, etc.)	9%
Indoor Pool	8%
Outdoor Pool	8%
Place my young child can go while I workout	8%
Lap Pool / Competitive Swim Pool	7%
Competitive Swim (High School Swim Teams)	2%

T1

T2

T3

T4

In addition, to traditional Health and Wellness activities / amenities offered (fitness, weightloss, equipment, etc.) the data indicates a pathway of programs and services that will further differentiate the Y and provide the community additional services they want. One of the biggest factors is areas to connect socially, which Food is a key component in bringing people together, to connect with family and friends and to meet new people.

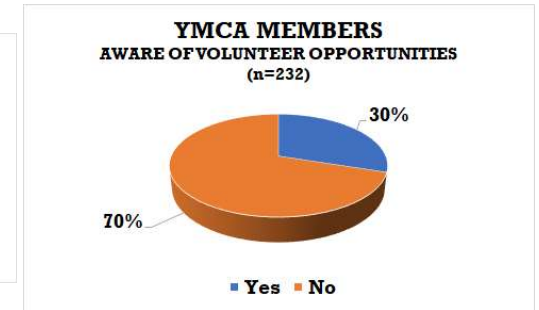
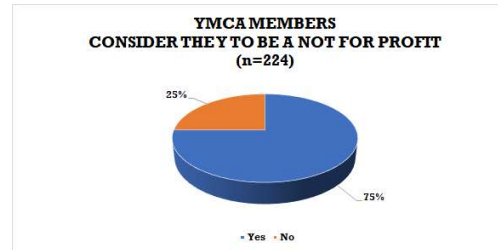
Other non-physical program (Enrichment, and Social Clubs) are equally important shifts and further identifies the Y beyond a mere health and wellness organization but a true community resource, which is supported by the data that sees the Y in this manner.

EXECUTIVE SUMMARY

A core differentiator to the Y and one that resonates especially with younger generations is the social consciousness of organizations. Volunteering is a critical area for Y's to program for and get their members and programs participants involved with as part of their on-boarding process and continuous experience. Volunteering, also assists in increasing donations, as members and program participants see the value / need of where and how dollars are utilized in improving the quality of life in the communities in which they operate.

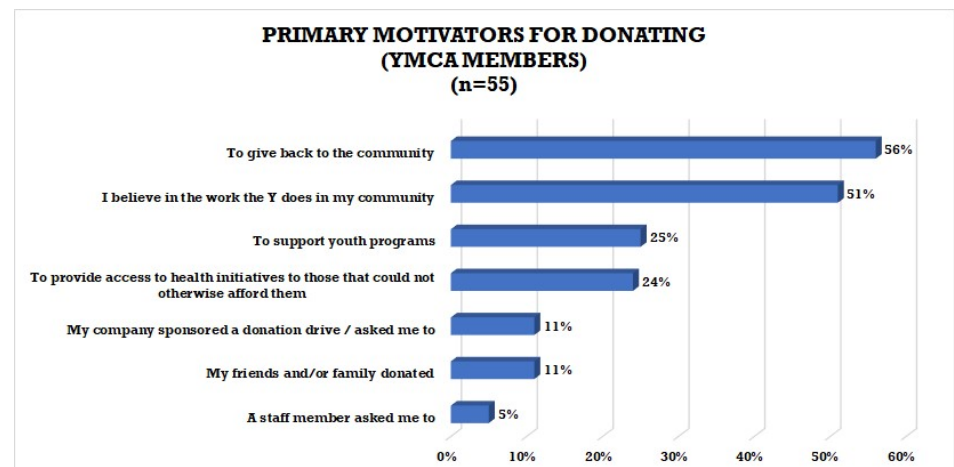
As highlighted earlier, there are many societal issues that the Y can and is positioned well to be the catalyst for positive change in the community. As such, aligning these societal needs to a volunteering program will enhance overall perception of the Y being more of a health and wellness, youth development provider but something deeper that people want to be a part of and associated with.

The findings from both Non-Y and YMCA members suggest that more work is needed to ensure that everyone knows the YMCA is a not-for profit (25% of current members do not) and that it is an organization that they can begin to better identify with and support. This recognition overtime should be seen in increased volunteerism and donations.



**90% OF
MEMBERS
HAVE NOT
VOLUNTEERED**

Responses	%
To give back to the community	65%
I believe in the work the Y does in my community	39%
A staff member asked me to	30%
I needed the service hours	4%
My friends and/or family volunteered	4%
My company sponsored an event	4%
An instructor asked me to	0%



EXECUTIVE SUMMARY

When assessing the preferences of the community to how members rate the MS Gulf Coast YMCA on a variety of attributes, you can see how well the Y is aligned with what the community wants from a health and wellness center :

Members:

- Overall, Membership is a Good Value (81%)
- I am extremely satisfied with my Y experience (81%)
- Offers high quality programs & services (80%)

Community = Convenience : (73% / 29%) (close to home and work)

- Both the Community and current members see the I-10 / 605 Exit location provides this to both the Gulfport Community.

Community = Non-intimidating Environment: (63%)

- Members: I feel welcomed (84%)
- Members: I feel that I belong (71%)
- Members: I feel safe at the Y (92%)

Community = Inclusive and Welcoming: (45%)

- Members: Atmosphere is warm and welcoming (84%)

Family Friendly (people of all ages): (36%)

- Fun place for me and my family (85%)
- The programs are helping me and my family achieve our goals (72%)

Bringing it all together by delivering on the brand promise is essentially for long-term sustainability and relevancy. Although much of what the community expressed in preferences align with what the YMCA stands for and delivers on their promise (safe place, clean facility), data suggests that there are areas that can be improved upon, largely as it relates to the level of engagement members receive from the staff of MS Gulf Coast YMCA. Immediate areas that need addressing are highlighted in red in the table to the right:

- Introducing members to other members (like interests, allows for quick familiarity and comfort level)
- Parking
- Discussing and helping them achieve their goals (addressed during needs assessment)
- Creating an atmosphere of social connectivity.

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
I feel safe at the Y	92%	62%	30%	4%	0%	2%	2%	1%
The Y is clean and well maintained	92%	54%	38%	5%	1%	2%	3%	0%

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
I feel that the staff believe in the work the Y does in my community	63%	28%	35%	29%	1%	2%	3%	6%
I receive support achieving my health and wellness goals	47%	17%	30%	28%	8%	6%	14%	11%
Staff members have actively introduced me to other members	24%	12%	12%	24%	28%	17%	45%	7%
I feel that I belong	71%	31%	40%	23%	3%	2%	5%	1%
I feel that the instructors believe in the work the Y does in my community	63%	25%	38%	23%	0%	1%	1%	13%
I like the way they communicate with me	67%	26%	41%	22%	4%	2%	6%	4%
I discuss my (and my family's) goals with a health and wellness coach	13%	5%	8%	21%	25%	13%	38%	28%

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
Staff members have actively introduced me to other members	24%	12%	12%	24%	28%	17%	45%	7%
Parking is easy and accessible	39%	12%	27%	16%	30%	14%	44%	1%
I discuss my (and my family's) goals with a health and wellness coach	13%	5%	8%	21%	25%	13%	38%	28%
I usually have at least one friend that I work out with	42%	15%	27%	18%	22%	12%	34%	7%

Areas in yellow indicate areas that left untreated, can cause members / program participants to move to red and then ultimately leave or if treated move to the green area to assist in increasing member satisfaction and ideally member length of stay.

CONCLUSION / INSIGHTS:

Conclusion:

Based on the findings not only is the Gulfport YMCA a viable option for the MS Gulf Coast YMCA to expand its reach and access to the community, the community itself appears to greatly welcome the presence of the Y especially at the I-10 / 605 location.

- The societal issues identified by both current YMCA members and the Non-Y Community align with the programs and services the Y provides. This highlights the importance of the Y in the Gulfport Community to be the catalyst for positive change, to be the link to bring in community partners to ensure the community as a whole is healthier and the burden on government is reduced.
- The I-10 / 605 location provides convenience, which when combined with the price and member type adjustments will increase the overall consideration of those in the community.

Programming / Engagement:

Overall the research provided insights into the program and services wanted / needed by the community, all of which also align with the societal issues aligned.

A few programs that would further differentiate the Y from others in the community while addressing societal needs includes:

- Adult Enrichment Programs
- Social Connectivity Enrichment Programs
- Food as a connection piece to bring people together

Marketing

❑ To Ensure top-of-mind Awareness levels increase in the area, a marketing strategy needs to be development to ensure that the projected number of member units can be achieved in before and shortly after opening.

➤ Marketing efforts should include not only the health benefits to joining a health and wellness organization but also those factors that differentiate the Y in the community

- Welcoming
- Family Friendly
- Not for Profit
- Socializing
- Get involved in the community (structured Volunteering opportunities)

CONCLUSION / INSIGHTS cont.

❑ Marketing and Operations Intersection

- To Ensure the brand promise (in marketing) is delivered through the operation experience it is imperative to address the few, yet important elements identified in the member satisfaction areas.
 - These issues are centered largely on ENGAGEMENT (STAFF to MEMBER)
 - Although not covered it would be beneficial for the MS Gulf Coast YMCA to conduct a staff engagement study among its current employees.
- With the majority of respondents working less than fifteen minutes from home, this location provides an additional convenience factor. Programming needs to be made available to support this convenience and staff need to be trained to be Engaged to support this additional flow of members.

❑ Creating Relevancy to Donate / Volunteer

- The main factor identified is creating a relevancy – need to get more involved which can be addressed through marketing and having an organized volunteering program. (note: 25% of current members are not aware that the Y is a not-for-profit)
 - Going back to ENGAGEMENT – asking members to volunteer and donate are at the heart for low involvement in both volunteering and donating to the Y.

❑ Pricing and Affordability

- Although current member rates are aligned with the community and affordability metrics, adding additional types, as indicated by the research will assist in increasing value, perception and consideration of the Y.
 - Slight changes such as adding a 2 – adult no dependents and a Single Parent option will also reduce the burden of financial aid in a market that has a degree of households residing in poverty.

Overall, applying these elements to the current market operations will assist in capitalizing on the expansion if and when it goes through and allow for a quicker performance in meeting the member unit estimates currently being projected for this location.

NEXT STEPS

There are few aspects that the Mississippi Gulf Coast Y can do today to enhance not only current operations but in preparation for expansion into the Gulfport community.

- 1) Marketing** – it is imperative to continue to reach new members and program participants and access in their current and new communities that unaided awareness levels, especially within the Health and Wellness area needs to increase. This increase will increase consideration and ultimately new member acquisition. This can be achieved without necessarily increasing marketing budgets substantially, although an increase will be needed, but rather by re-development a strategy to maximize the results of the amount spend. Greater Than > Analytics is happy to have deeper discussion of how this can be accomplished using carefully selected marketing mediums in the right rotation throughout the year.
 - a. Use the relatively higher unaided awareness of the YMCA as a provider of Camp, Youth Sports and Youth Development programs to cross promote Membership with these programs bringing a more holistic understanding of the value of membership, further differentiating it from like providers such as Planet Fitness and Kroc Center, while creating awareness of the YMCA overall.
- 2) Operations & Engagement** - specifically as it related to staff to member engagement is an area where slight improvements can be made. Currently if staff (new and current) are not going through onboarding training and if this onboarding process is not formalized in a manner that can be applied to member experience then it is recommended that this be implemented. Greater Than > Analytics can assist in facilitate this training and developing an onboarding process if desired.
- 3) Volunteering** – implementing a formalized volunteering plan, that can also be used as part of a member onboarding process would be highly beneficial for increasing Engagement, but also differentiating the Y from other providers in the community. Start with something manageable, such as four activities per year. These activities should be planned and promoted throughout the current centers, social media and within the marketing strategy.
- 4) Pricing / Membership type alterations** – using January 2020 as a targeted date for launching this new rate structure, with marketing, promotions and PR to begin in November. The key is to align this with VALUE so operational improvements need to be seen when current and new members enter the building.

NEXT STEPS cont.

Societal Factors / Y as a Catalyst for Change – regardless of the Gulfport expansion initiative, the MS Gulf Coast YMCA would benefit from aligning their marketing, volunteering and operational efforts to begin addressing the societal issues identified in this report.

- Partnering with organizations and community leaders to formalize a process and system for addressing these areas
- Adopt a method of tracking results to measure effectiveness of effort and to use in marketing, PR and annual reports to communicate back to the community of what the Y is doing and the positive results achieved.
- This should also be aligned with specific volunteering and donor driving initiatives to assist in raising funds to keep the efforts moving forward so that the Y can continue to increase reach and access within the community it operates.

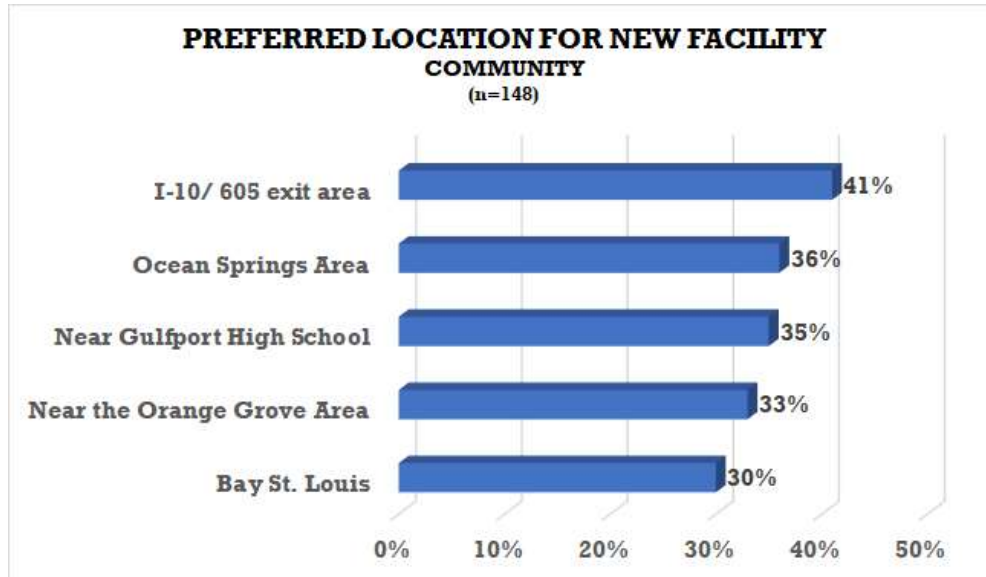


DETAIL FINDINGS

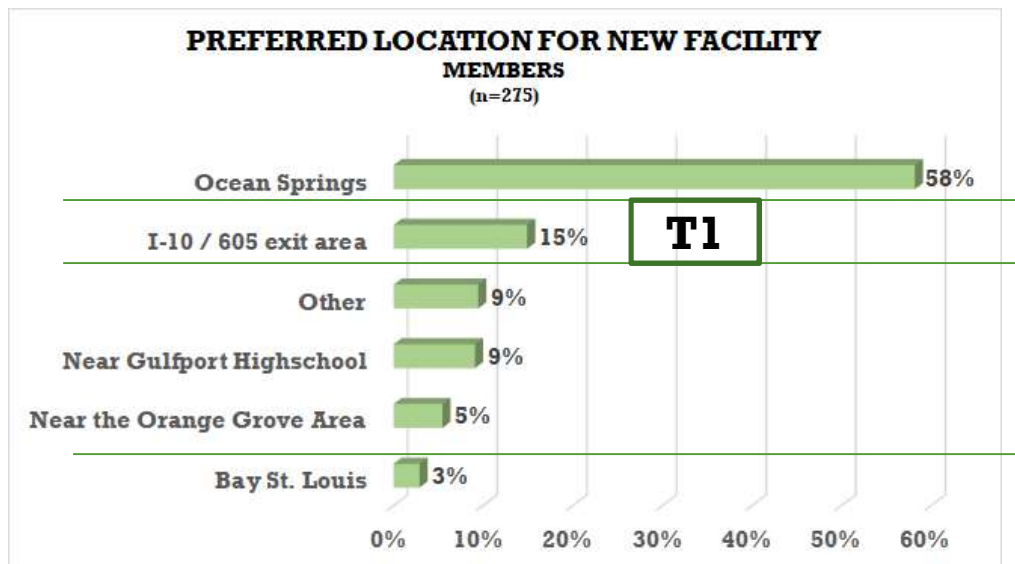
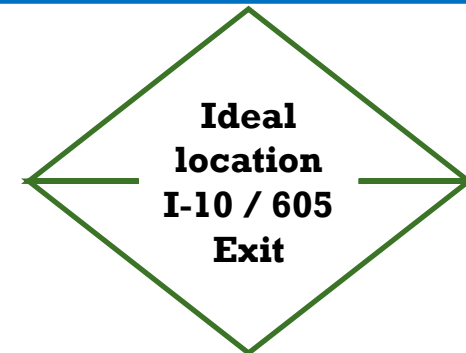


NEW LOCATION AND VIEW OF THE Y

PREFERRED LOCATION



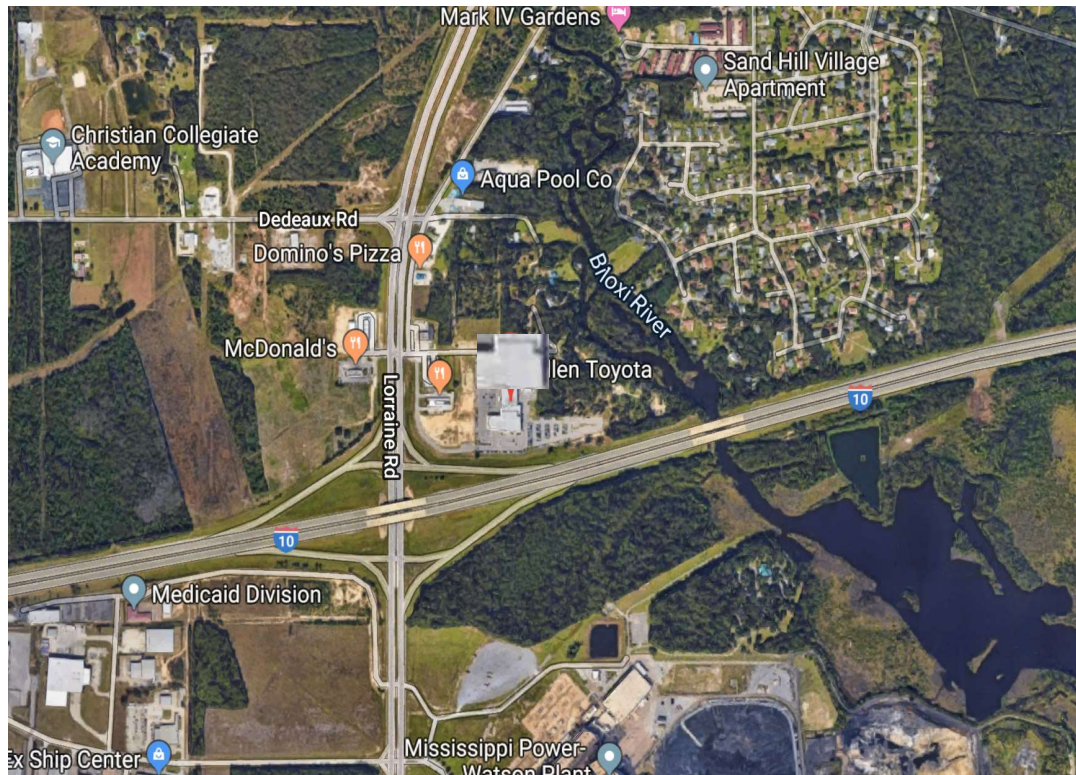
Although, with the exception of Bay St. Louis, all locations are viewed statistically equivalent, however based on a percentage point ranking system the I-10 / 605 exit is the preferred location among the community.



If we exclude Ocean Springs, due to the high proportion of members from this location (perhaps a future expansion opportunity), significantly more members prefer the I-10 / 605 exit location verse the other areas reviewed.

Note: the majority of members are from the Ocean Springs location
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PROJECTIONS I-10 / 605 EAST



Estimated Member Projections = 3,971 – 4,633

Actual build should not exceed 50,000 sq. ft. during phase I.



PREFERENCES / AMENITIES

NEW LOCATION

Preferred Amenities and Programs Desired

Amenities Desired

State of the Art Fitness
Equipment
Indoor pool
Chef's Kitchen
Rock climbing Wall

Fitness Classes

Weight loss Program
Personal Training
Nutrition
Senior Specific Fitness Classes

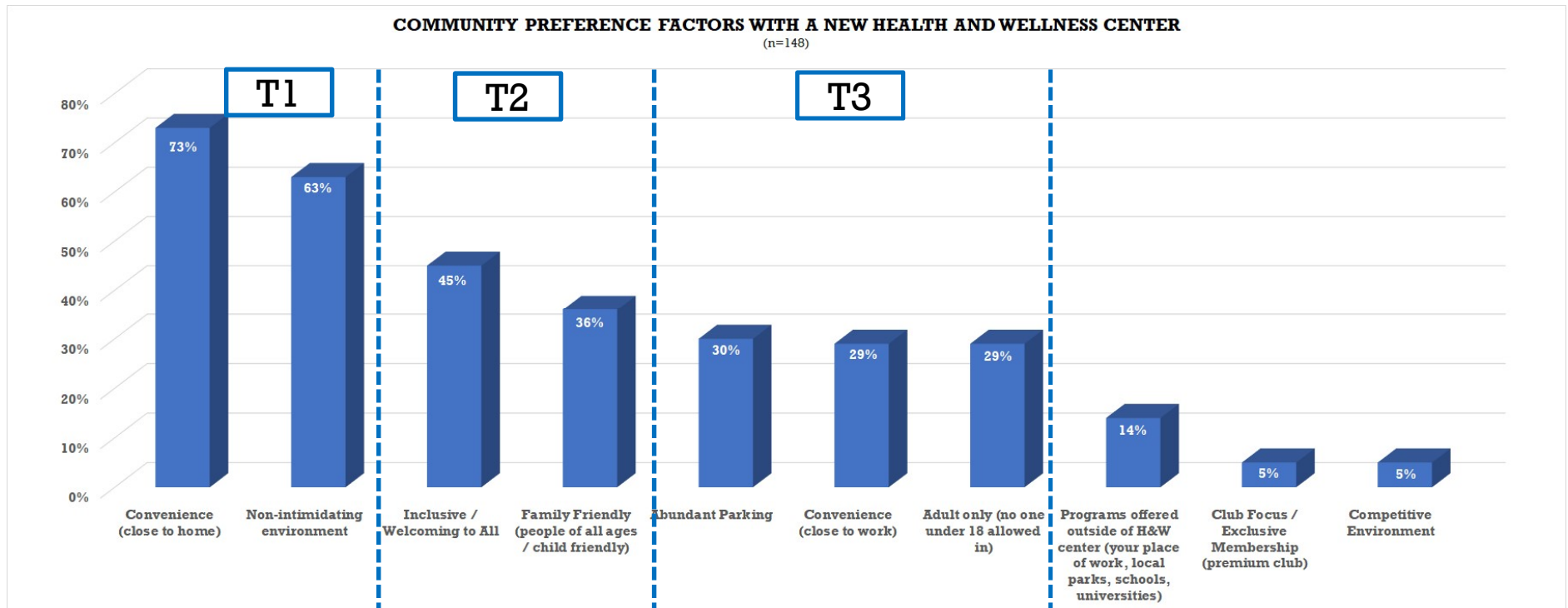
Although
**Obesity and
Senior
Isolation** are
seen as core
issues among
members only,
the
Community's
program
choices
suggest
otherwise.

Sport Programs

Adult Tennis
Youth Soccer
Adult Softball
Adult Volleyball
Co-ed Sport Leagues
Adult Racquetball
Youth Gymnastics

*Other sports may
be desired;
however the key
factor is fun
activities that
bring people
together.*

NEW LOCATION PREFERENCES



Key Factors needed for the New Location:

- T1 -

**Convenience (home) (I-10 / 605 Exit)
&
Non-Intimidating Env.**

- T2 -

**Inclusive / Welcoming
&
Family Friendly**

Member Preferences

(Community Preference to Members Reality)

When assessing the preferences of the community to how members rate the MS Gulf Coast YMCA on a variety of attributes, you can see how well the Y is aligned with what the community wants from a health and wellness center :

Members:

- Overall, Membership is a Good Value (81%)
- I am extremely satisfied with my Y experience (81%)
- Offers high quality programs & services (80%)

Community = Convenience : (73% / 29%) (close to home and work)

- Both the Community and current members see the I-10 / 605 Exit location provides this to both the Gulfport Community.

Community = Non-intimidating Environment: (63%)

- Members: I feel welcomed (84%)
- Members: I feel that I belong (71%)
- Members: I feel safe at the Y (92%)

Community = Inclusive and Welcoming: (45%)

- Members: Atmosphere is warm and welcoming (84%)

Family Friendly (people of all ages): (36%)

- Fun place for me and my family (85%)
- The programs are helping me and my family achieve our goals (72%)

AMENITIES DESIRED

Amenities Desired:	COMMUNITY (n=148)
State of the art fitness equipment	46%
Indoor Pool	45%
Therapy Pool	32%
Food Court / Food Options Available	31%
Gymnasium	26%
Outdoor Pool	23%
Kid friendly pool	22%
Family Room (large TV, comfortable couches and chairs, etc.)	22%
Game Room (pool table, ping pong, x-box, PlayStation)	21%
Family Pool Area (Slides and Games)	20%
Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	18%
Eating / Gathering Area [bring your own food in to eat with friends]	18%
Place my young child can go while I workout	17%
Lap Pool / Competitive Swim Pool	15%
Computer Lab / Workstation	15%
Teen Center	12%
Virtual (VR – technology) Fitness Equipment	11%
Rock Climbing Wall	11%
None of the above	10%
Competitive Swim (High School Swim Teams)	4%

= T1

= T2

= T3

When examining the Amenities desired among both the Community and Current Members we see the following emerge as top attributes desired:

- ☐ **State of the Art Equipment**
- ☐ **Food Court**
- ☐ **Kid Friendly Pool**
- ☐ **Indoor / Outdoor Pool**
- ☐ **Therapy Pool**

Note: Members were asked to focus on amenities that currently they do not participate in at the Y

- ☐ **Chef's Kitchen**
- ☐ **Rock Climbing Wall**

Amenities Desired:	MEMBER (n=224)
Chef's Kitchen (cooking classes, renting out for group gatherings, etc.)	47%
Rock Climbing Wall	35%
Family Pool Area (Slides and Games)	29%
Food Court / Food Options Available	27%
State of the art fitness equipment	25%
Gymnasium	20%
Therapy Pool	17%
Kid friendly pool	13%
Teen Center	13%
Virtual (VR – technology) Fitness Equipment	13%
Game Room (pool table, ping pong, x-box, PlayStation)	11%
Computer Lab / Workstation	11%
Eating / Gathering Area [bring your own food in to eat with friends]	10%
None of the above	10%
Family Room (large TV, comfortable couches and chairs, etc.)	9%
Indoor Pool	8%
Outdoor Pool	8%
Place my young child can go while I workout	8%
Lap Pool / Competitive Swim Pool	7%
Competitive Swim (High School Swim Teams)	2%

= T1

= T2

= T3

= T4

FITNESS PROGRAM DESIRED TO SEE AT NEW HEALTH AND WELLNESS CENTER.

Fitness Related Programs	Community (n=146)	T1
Weightloss Program	44%	
Personal Training Options	41%	
Nutrition Classes	34%	
Senior Specific Fitness Classes	30%	
Group Exercise Classes	28%	
Pool Specific for Aquatics Program	22%	
Swim Lessons (Adult and Youth)	20%	
Summer Day Camp Activities	16%	
Not Interested in Fitness and Health Programs	15%	
Family Personal Training Classes	10%	

Fitness Related Programs	Member (n=214)	T1
Nutrition Classes	38%	
Weightloss Program	34%	
Group Exercise Classes	29%	
Family Personal Training Classes	21%	
Personal Training Options	18%	
Senior Specific Fitness Classes	17%	
Pool Specific for Aquatics Program	13%	
Summer Day Camp Activities	9%	
Swim Lessons (Adult and Youth)	6%	
Not Interested in Fitness and Health Programs	5%	

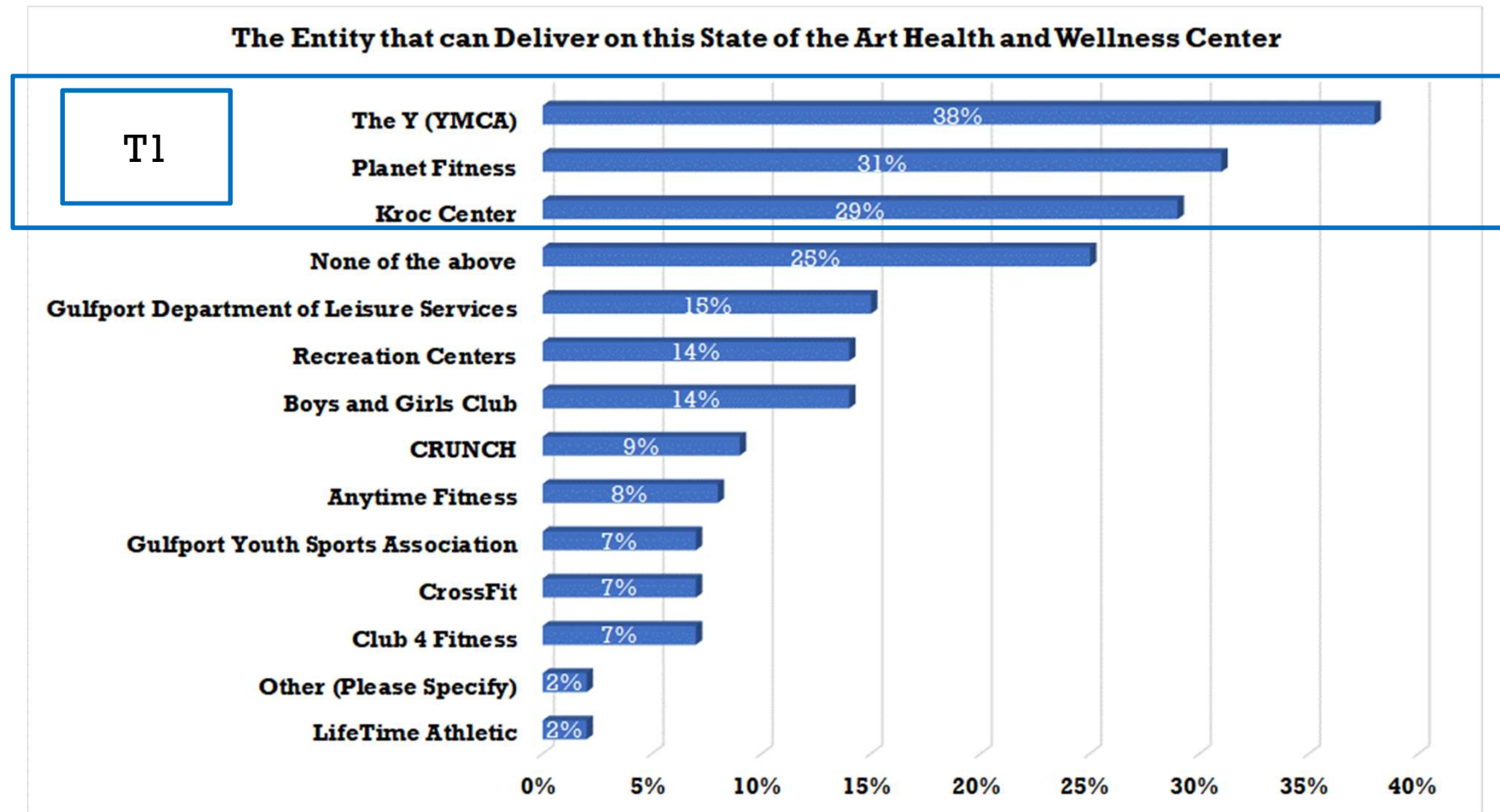
NON-PHYSICAL PROGRAMS

Non-Physical Activities	Community (n=147)
Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	55%
Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	33%
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	28%

Non-Physical Activities	Member (n=214)
Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	58%
Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	35%
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	32%

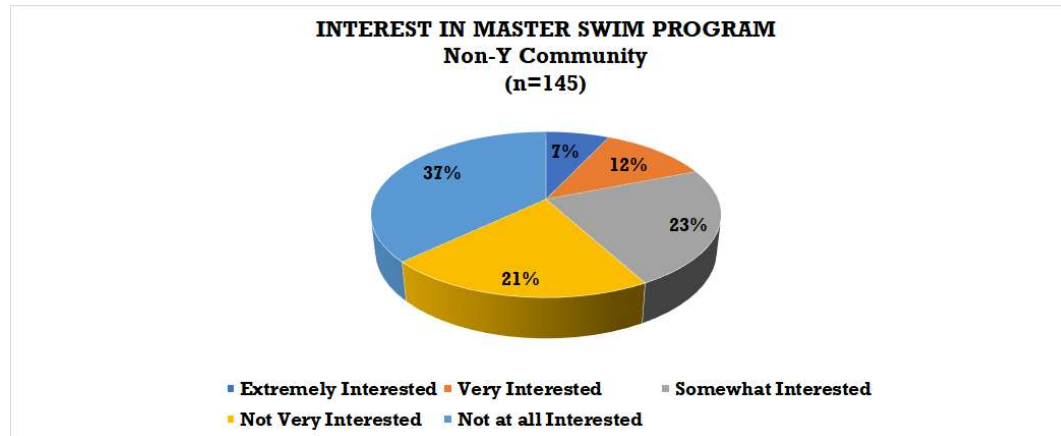
Among both the Community and current members of the Y, Adult Enrichment Classes are indicated as a primary desire to have at the new location.

ENTITY THAT CAN DELIVER ON THIS STATE OF THE ART HEALTH AND WELLNESS CENTER



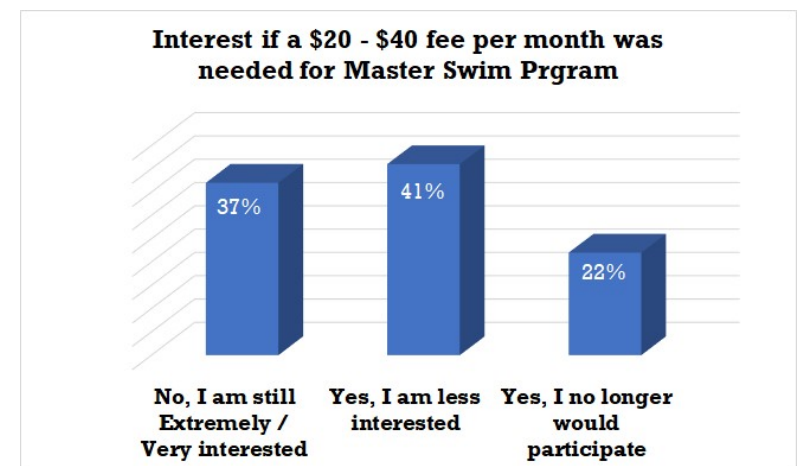
From a percentage point the Y is viewed as the top entity that can deliver on this state of the art health and wellness center.

MASTER SWIM PROGRAM

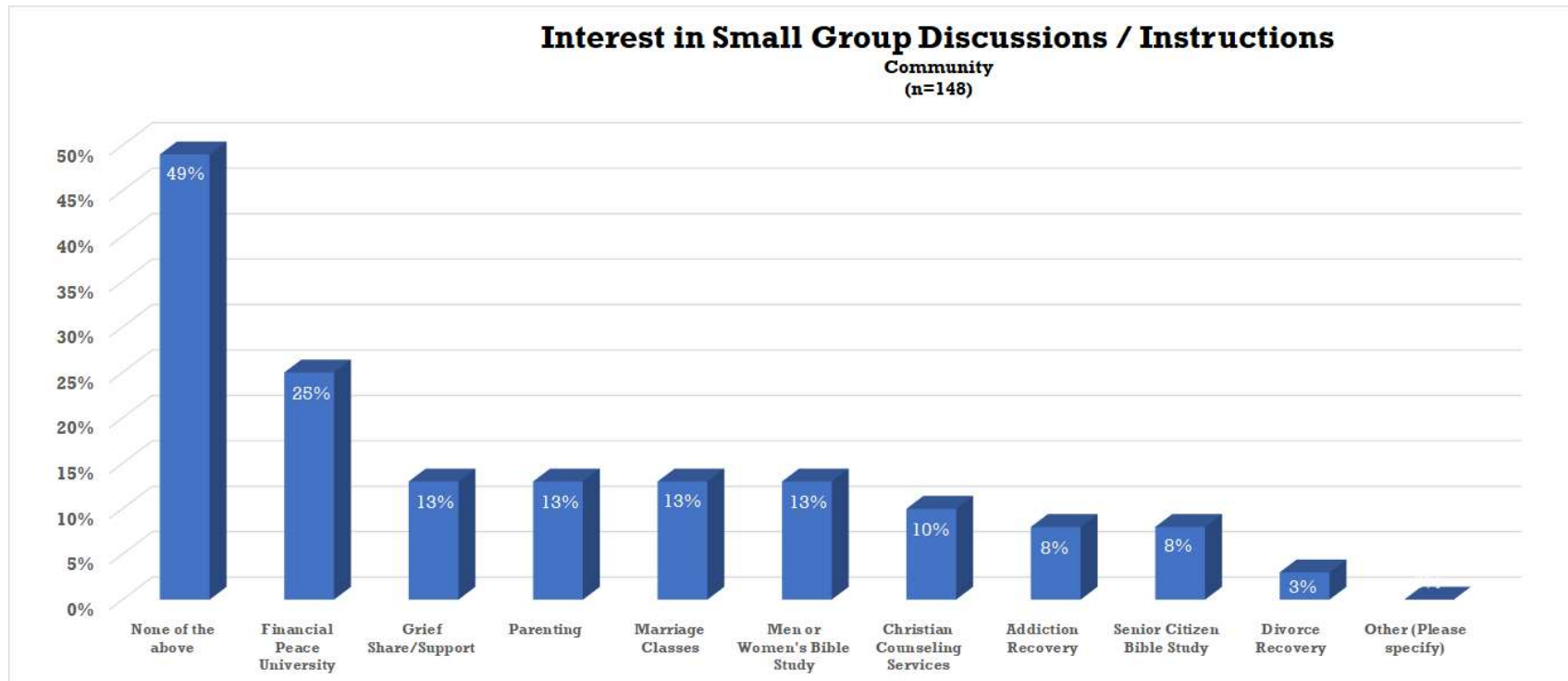


The majority of the Non-Y Community (58%) Not Very / Not at All Interested in a Master Swim Program, with just over 2/5 (42%) Somewhat to Very Interested

Among those interested, just over 1/5 would no longer be interested if a fee was applied to the program, while just under 2/5 (37%) are still interested.



SMALL GROUP DISCUSSIONS



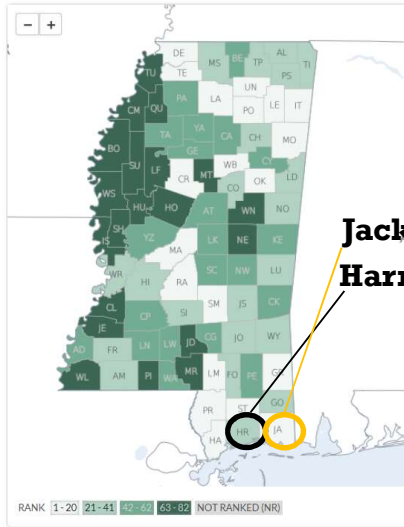
Almost ½ of the Non Y community are not interested in any of the Small Group Discussions proposed, however among the discussions / instruction areas of interest Financial Peace is the most appealing with almost 3/10 (28%) of the respondents.



THE YMCA - CATALYST FOR POSITIVE SOCIETAL CHANGE

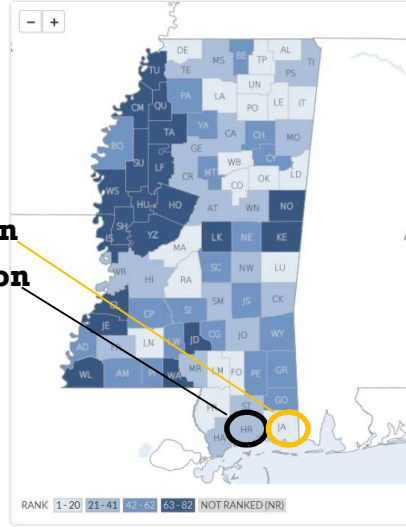
Health Rankings

Overall Rankings in Health Outcomes ⓘ



The overall rankings in health outcomes represent how healthy counties are within the state, based on how long people live and how healthy they feel while alive. Lower the Score the Healthier the County is.

Overall Rankings in Health Factors ⓘ



The overall rankings in health factors represent what influences the health of a county. The ranks are based on four types of measures: health behaviors, clinical care, social and economic, and physical environment factors.

Harrison County

Rank - 22

Rank - 24

Jackson County

Rank - 9

Rank - 8

Harrison County

Jackson County

Health Outcomes

Length of Life

18

11

Quality of Life

25

08

Health Factors

Health Behaviors

35

03

Clinical Care

34

16

Social and Economic Factors

20

15

Physical Factors

22

12

The information illustrates the communities current health factors and opportunities and benefits for a Y to come into the area. Using Jackson Count (Blossman YMCA Area) provides a comparison point of market factors

KEY AREAS TO PROVIDE CONTEXT AND INSIGHT INTO THE Y:

Issues facing the community indicated by primary and secondary research:

- ☐ **Obesity** (Mississippi spent **\$925 million** in health-care costs directly related to obesity in 2008)
- ☐ **Chronic Disease** (**Obesity and Stress** and two contributing factors to chronic disease)
- ☐ **Stress Reduction** (Long-term stress **leads to mental illness, cardiovascular disease and obesity**)
- ☐ **Senior Isolation** (Mississippi has the **highest risk of people 65 years and older experiencing social isolation**)
- ☐ **Youth & Bullying Isolation** (**can lead to mental disorders, including depressive disorders**)
 - Bullying can lead to: Substance Abuse, Missing Work & School, Suicide)
- ☐ **Juvenile Crime** (**costs the state of MS \$93,000/day in residential facilities**)
- ☐ **Poverty** (**19.8% of MS Population had incomes below the poverty line (\$24,860 for a family of four) in 2017**)

Key Factors:

- ☐ **Seen as a High Quality / Low Cost provider finding supported by current members and is a highly considered entity for the market in both Health and Wellness services and Youth development services.**
- ☐ **Price and Convenience core consideration factors, which the I-10 / Hwy 605 location can accommodate along with it's low cost and scholarship opportunities.**
- ☐ **The Community views the Y has the top ranked organization to provide the community of Gulfport a state of the are Health and Wellness and Youth Development organization.**

Based on the Demographics and findings from the research there are 4 critical areas of importance to focus on with insights on how the Y is aligned to address these issues:

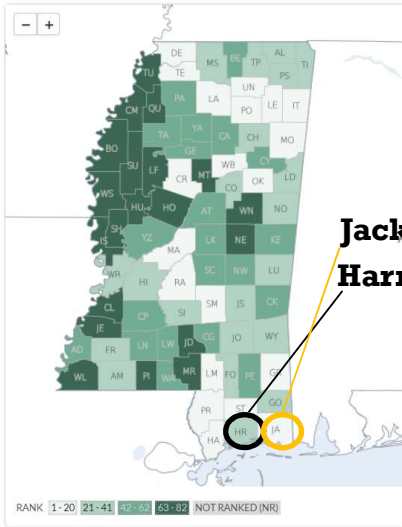
Rank	Societal Issue	COMMUNITY (n=148)
1	Adult Crime	43%
2	Poverty	42%
3	Lack of Quality Education	34%
4	Homelessness	33%
5	Juvenile Crime	31%
6	Opioid Addiction	27%
7	Lack of Skilled / Technical Labor Force	20%
8	Childhood Obesity	18%
9	Senior Social Isolation	13%
10	Other (Please specify)	9%
11	Chronic Diseases	8%

Rank	Societal Issue	MEMBER (n=260)
1	Childhood Obesity	41%
2	Chronic Diseases	31%
3	Poverty	30%
4	Homelessness	27%
5	Opioid Addiction	25%
6	Lack of Quality Education	20%
7	Senior Social Isolation	18%
8	Juvenile Crime	17%
9	Adult Crime	13%
10	Other (Please specify)	13%
11	Lack of Skilled / Technical Labor	10%

Overall, there are relationships between and among many of these societal issues identified by both members and the community and therefore it takes multiple entities to address these areas, with one provider (the Y) that is best positioned to be the convener and therefore the catalyst for change.

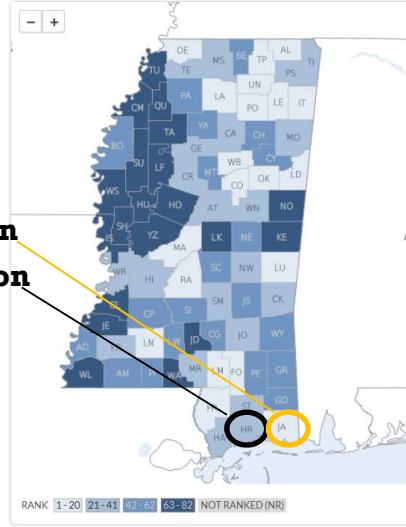
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Health Behaviors

35

03

Clinical Care

34

16

Social and Economic Factors

20

15

Physical Factors

22

12

The information illustrates the community's current health factors and opportunities and benefits for a Y to come into the area. Using Jackson County (Blossman YMCA Area) provides a comparison point of market factors

1) Obesity – Chronic Disease - Stress

Obesity is hurting **Mississippi's** economy. An **obese** person generates 40 percent more in medical **costs** per year than a non-**obese** person. In 2008, **Mississippi** spent **\$925 million in health-care costs directly related to obesity**. If the trend continues, **obesity related health-care costs** will be **\$3.9 billion by 2018**.

Source: [https://www.umc.edu/Research/Centers-and-Institutes/Centers/Mississippi-Center-for-Obesity-Research/Resources/Obesity in Mississippi.html](https://www.umc.edu/Research/Centers-and-Institutes/Centers/Mississippi-Center-for-Obesity-Research/Resources/Obesity%20in%20Mississippi.html)

Chronic, non-communicable diseases are the leading causes of death in Mississippi and nationwide. Mississippi consistently rates as one of the most obese states in the nation and has some of the highest rates of diabetes, hypertension, heart disease, and strokes in the nation. **Obesity is one of the greatest threats to the health of our state**, and efforts thus far have had limited effectiveness in curbing this growing epidemic. According to the CDC, **75% of total health care expenditures are associated with treating chronic diseases**. ***If Mississippians reduce their BMI rates to lower levels and achieve an improved status of health, the state could save over \$13 billion annually in unnecessary health care costs. If we want to build a healthier Mississippi, we must tackle this grave problem.***

Source: <https://uprootms.org/priorities/reduce-rate-of-chronic-disease/>

1) Obesity – Chronic Disease

By focusing on physical activity you can begin addressing two critical issues in the community: Obesity and Chronic Disease, thereby positively impacting the overall quality of life for its citizens while reducing the economic burden these issues create.

A key life priority addressed by both Community and Current Members is on **Work on / Maintaining Health**

Barriers to address any of the priorities outlined include:

Lack of Money

Y is seen as High Quality Low Cost Provider of Health and Wellness Services from both the Community and Current Members

Offers Financial Aid to ensure everyone in the community has access to high quality health and wellness programs

Lack of Resources

The Y provides multiple programs and services all under 1 roof

Convenience – saving time and money for only needing to go to 1 place for all your needs

Stress

Key Contributor to Chronic Disease and Obesity

Remedy to reduce stress is physical activity / playing sports / moving

Not enough time

Convenience become more important

I-10 / 605 location is ideal location for convenience (close to home and work – almost ½ of pop. Age 16+ commute under 30 minute for work)

Refer to the list of sports people want

FITNESS PROGRAM DESIRED TO SEE AT NEW HEALTH AND WELLNESS CENTER.

The community and current Y members desire healthy options making Health a priority in their life.

Fitness Related Programs	Community (n=146)	T1
Weightloss Program	44%	
Personal Training Options	41%	
Nutrition Classes	34%	
Senior Specific Fitness Classes	30%	
Group Exercise Classes	28%	
Pool Specific for Aquatics Program	22%	
Swim Lessons (Adult and Youth)	20%	
Summer Day Camp Activities	16%	
Not Interested in Fitness and Health Programs	15%	
Family Personal Training Classes	10%	

Fitness Related Programs	Member (n=214)	T1
Nutrition Classes	38%	
Weightloss Program	34%	
Group Exercise Classes	29%	
Family Personal Training Classes	21%	
Personal Training Options	18%	
Senior Specific Fitness Classes	17%	
Pool Specific for Aquatics Program	13%	
Summer Day Camp Activities	9%	
Swim Lessons (Adult and Youth)	6%	
Not Interested in Fitness and Health Programs	5%	

2. STRESS – key contributor to many health factors

What Are the Consequences of Long-Term Stress?

A little stress every now and then is not something to be concerned about. Ongoing, chronic stress, however, can cause or exacerbate many serious health problems, including:

- **Mental health** problems, such as depression, anxiety, and personality disorders
- **Cardiovascular disease**, including heart disease, high blood pressure, abnormal heart rhythms, heart attacks, and stroke
- **Obesity** and other eating disorders

Source: <https://www.webmd.com/balance/stress-management/stress-symptoms-effects-of-stress-on-the-body>

Exercise and stress relief

Exercise increases your overall health and your sense of well-being,

It pumps up your endorphins. Physical activity helps bump up the production of your brain's feel-good neurotransmitters, called endorphins.

It's meditation in motion. After a fast-paced game of racquetball or several laps in the pool, you'll often find that you've forgotten the day's irritations and concentrated only on your body's movements.

It improves your mood. Regular exercise can increase self-confidence, it can relax you, and it can lower the symptoms associated with mild depression and anxiety.

Source: <https://www.mayoclinic.org/healthy-lifestyle/stress-management/in-depth/exercise-and-stress/art-20044469>

Core Programs Desired by the Community and Members

Sport Programs of Interest

Adult Tennis	20%
Youth Soccer	16%
Adult Softball	16%
Adult Volleyball	14%
Co-Ed Sport Leagues / intramural sports	14%
Adult Racquetball	12%
Youth Gymnastics	12%
Youth Softball	11%
Youth Volleyball	11%
Youth Basketball	10%
Adult Basketball	10%
Adult Soccer	10%
Youth Tennis	10%
Sport Mix	10%
Adult Pickle ball	6%
Youth Racquetball	3%
Youth Pickle Ball	1%

= T1

= T2

3. SOCIAL ISOLATION

☐ SENIOR SOCIAL ISOLATION

☐ YOUTH SOCIAL ISOLATION

2) Social Isolation - Seniors

Among Seniors:

HATTIESBURG, MS (WDAM) - According to recent research, **Mississippi has the highest risk of people 65 years and older experiencing social isolation.**

WDAM spoke with a local educator about why Mississippi is leading the research.

"The population of older adults as you know is exploding. We call it the silver tsunami now because so many of us baby boomers are turning 60 and 65," said Susan Hrostowski, an associate professor for the University of Southern Mississippi School of Social Work.

The research from Databank USA attributed Mississippi's ranking to a high poverty rate.

"Earnings across the life span come to roost in your retirement, because if you haven't earned a lot as you have worked you haven't put that much into retirement and your social security is not very high," Hrostowski said. "So, right away we are talking about limited and moderate to low income for a lot of older adults."

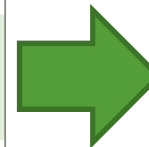
Social isolation is one of the leading causes for depression later in life so, Hrostowski said getting involved and being active can create a positive environment curbing social isolation.

"The solution is programming. **We need programs, services and activities for well older adults,**" Hrostowski said. "It's very important. If you know older adults and you see they are isolated and don't have many people coming to visit them you don't have to invest all your time and energy, just every once in a while send them a card, say hello, bake them a cookie. Just once in a while. It's a wonderful thing. It makes you feel good as well as the older person."

Source: <https://www.wdam.com/2019/03/21/ms-has-highest-risk-social-isolation-people-years-older/>

In addition to Physical Activity Classes – the Community Expressed interest in these Social Oriented Classes

Non-Physical Activities	Community (n=147)	Non-Physical Activities	Member (n=214)
Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	55%	Adult Enrichment Classes (Art, Crafts, Photography, Language Programs, Music, Computer Training)	58%
Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	33%	Social Clubs (Travel, Chess, Card Games, Book, Knitting, Golf, Bocce Ball, Scrap booking, etc.)	35%
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	28%	Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	32%



Senior's want "senior specific fitness classes" which continues to allow for opportunities interact and meet new people

2a) Social Isolation - Youth

Youth / Children

Research shows that social isolation and loneliness often correlates with mental disorders, including depressive disorders.

Source: <https://www.noisolation.com/global/research/consequences-of-social-isolation-for-children-and-adolescents/>

Safe Place / Inclusive / Welcoming

Why Does Bullying Matter?

Bullying is a serious educational issue, and a matter of public health and safety. It creates a climate of fear and panic within schools, on playgrounds and throughout neighborhoods – and in today's digital age, bullying is carried out after school hours over the Internet. Children, adolescents and adults harmed by bullying often suffer from a wide range of psychological and school-related problems, including anxiety, depression, low self-esteem, suicidal ideation, chronic lateness and absences, and difficulty concentrating.

- What Are the Effects of Bullying?
- Bullying can often have painful physical and emotional effects such as:
 - Emotional Distress
 - Substance Abuse
 - Missing Work & School
 - Suicide
- How Can We Prevent Bullying?

School administrators, staff, educators, parents and community members can help prevent bullying by discussing it in classes, building a safe school environment and by creating a bullying prevention strategy in their community.

When assessing the preferences of the community to how members rate the MS Gulf Coast YMCA, you can see how well the positioned the Y is to bring high quality low cost programs and services to the community of Gulfport:

Members:

- Overall, Membership is a Good Value (81%)
- I am extremely satisfied with my Y experience (81%)
- Offers high quality produces & services (80%)

Community = Convenience : (73% / 29%) (close to home and work)

- Both the Community and current members see the I-10 / 605 Exit location provides this to both the Gulfport Community.

Community = Non-intimidating Environment: (63%)

- Members: I feel welcomed (84%)
- Members: I feel that I belong (71%)
- Members: I feel safe at the Y (92%)

Community = Inclusive and Welcoming: (45%)

- Members: Atmosphere is warm and welcoming (84%)

Family Friendly (people of all ages): (36%)

- Fun place for me and my family (85%)
- The programs are helping me and my family achieve our goals (72%)

Non-Physical Activities	Community (n=147)
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	28%
Non-Physical Activities	Member (n=214)
Youth Development / Enrichment Classes (i.e. Science, Technology, Engineering, Art, Music and Math)	32%

4) Crime (Juvenile Crime)

Reporting states spent an average of \$7.1 million per day locking up youth in residential facilities.

State	Youth in Residential Placement	Cost per day per youth	Total cost per day based on total population
Alabama	1,251	\$137.21	\$171,649.71
Alaska	198	\$252	\$49,896
Arizona	1,083	\$314	\$340,062
California	8,955	\$67.51	\$604,552.05
Colorado	1,617	\$161	\$260,337
Connecticut	312	\$726	\$226,512
Georgia	1,398	\$200.68	\$280,550.64
Indiana	1,866	\$153.78	\$286,953.48
Louisiana	807	\$387.12	\$312,405.84
Maine	159	\$412.05	\$65,515.95
Maryland	525	\$229	\$120,298.50
Michigan	2,115	\$391	\$827,451.45
Mississippi	219	\$426.51	\$93,405.69
Missouri	825	\$133	\$109,791
Nebraska	252	\$173	\$43,596
New Jersey	870	\$174	\$151,380
North Carolina	804	\$262	\$210,648
North Dakota	222	\$146.64	\$32,554.08
Ohio	2,898	\$216	\$624,924.72
Oklahoma	624	\$158.96	\$99,191.04
Pennsylvania	3,318	\$362	\$1,201,116
Rhode Island	330	\$58.95	\$19,453.50
South Dakota	474	\$219.79	\$104,180.46
Utah	606	\$195	\$118,170
Virginia	1,455	\$280	\$407,400
West Virginia	417	\$227	\$94,659
Wisconsin	1,092	\$259	\$282,828
Wyoming	288	\$24.44	\$7,038.72
Total for States Reporting	34,980		\$7,146,521

Source:

http://www.justicepolicy.org/images/upload/09_05_rep_costs_of_confinement_jj_ps.pdf

According to research done by E. Tennessee State University... The results indicated that children from divorced homes have higher rates of delinquency (status offenses, crimes against person, felony theft, general delinquency, tobacco and drug use) compared to children from intact homes

source: homesviewcontent.cgi?article=3380&context=etd

\$93.4 thousand per day spent on juvenile facilities

15% - 17% of the surrounding areas are single parents with children under 18

Family Dynamics	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Married w/ Children under 18	18%	18%	15%	18%	19%	19%
Single Parent w/ Children under 18	15%	16%	17%	16%	18%	16%
Non-Family w/ Children under 18	0%	0%	0%	0%	0%	0%
Married w/o Children under 18	24%	23%	21%	23%	23%	25%

4) Crime (Juvenile Crime)

(Breakdown of the Family and Sports as possible solution)

A review of the empirical evidence in the professional literature of the social sciences gives policymakers an insight into the root causes of crime. Consider, for instance:

- ❑ Over the past thirty years, the rise in violent crime parallels the rise in families abandoned by fathers.
- ❑ High-crime neighborhoods are characterized by high concentrations of families abandoned by fathers.
- ❑ State-by-state analysis by Heritage scholars indicates that a 10 percent increase in the percentage of children living in single-parent homes leads typically to a 17 percent increase in juvenile crime.
- ❑ The rate of violent teenage crime corresponds with the number of families abandoned by fathers.
- ❑ The type of aggression and hostility demonstrated by a future criminal often is foreshadowed in unusual aggressiveness as early as age five or six.
- ❑ The future criminal tends to be an individual rejected by other children as early as the first grade who goes on to form his own group of friends, often the future delinquent gang.

<https://www.heritage.org/crime-and-justice/report/the-real-root-causes-violent-crime-the-breakdown-marriage-family-and>

Sports as a solution to preventing Juvenile Crime

When high schools have strong interscholastic sports participation rates, they report lower levels of major crime and fewer suspensions, according to a new University of Michigan study.

<http://yvpc.sph.umich.edu/participation-high-school-sports-lowers-major-crime/>

In areas where the family dynamic breaks down, the Y is well position to assist in providing children the support needed to ensure they become thriving adults.

Sport Programs of Interest

Adult Tennis	20%
Youth Soccer	16%
Adult Softball	16%
Adult Volleyball	14%
Co-Ed Sport Leagues / intramural sports	14%
Adult Racquetball	12%
Youth Gymnastics	12%
Youth Softball	11%
Youth Volleyball	11%
Youth Basketball	10%
Adult Basketball	10%
Adult Soccer	10%
Youth Tennis	10%
Sport Mix	10%
Adult Pickle ball	6%
Youth Racquetball	3%
Youth Pickle Ball	1%

T1

T2

The Y creates opportunities (organic and structured) for children to feel safe, welcomed and protected.

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5) Poverty

The Brookings Institution has spent a great deal of effort studying this issue.

Brookings whittled down a lot of analysis into three simple rules. You can avoid poverty by:

1. Graduating from high school.
2. Waiting to get married until after 21 and do not have children till after being married.
3. Having a full-time job.

If you do all those three things, your chance of falling into poverty is just 2 percent. Meanwhile, you'll have a 74 percent chance of being in the middle class.

19.8% of MS Population had incomes below the poverty line (\$24,860 for a family of four) in 2017
<https://talkpoverty.org/state-year-report/mississippi-2018-report/>

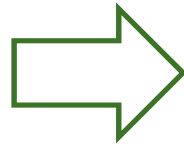
Putting Children and Young Adults on the right path to success

Sports

Character Development

***Encouragement /
Community Support***

***Team work +
Confidence +
Structure +
Discipline***



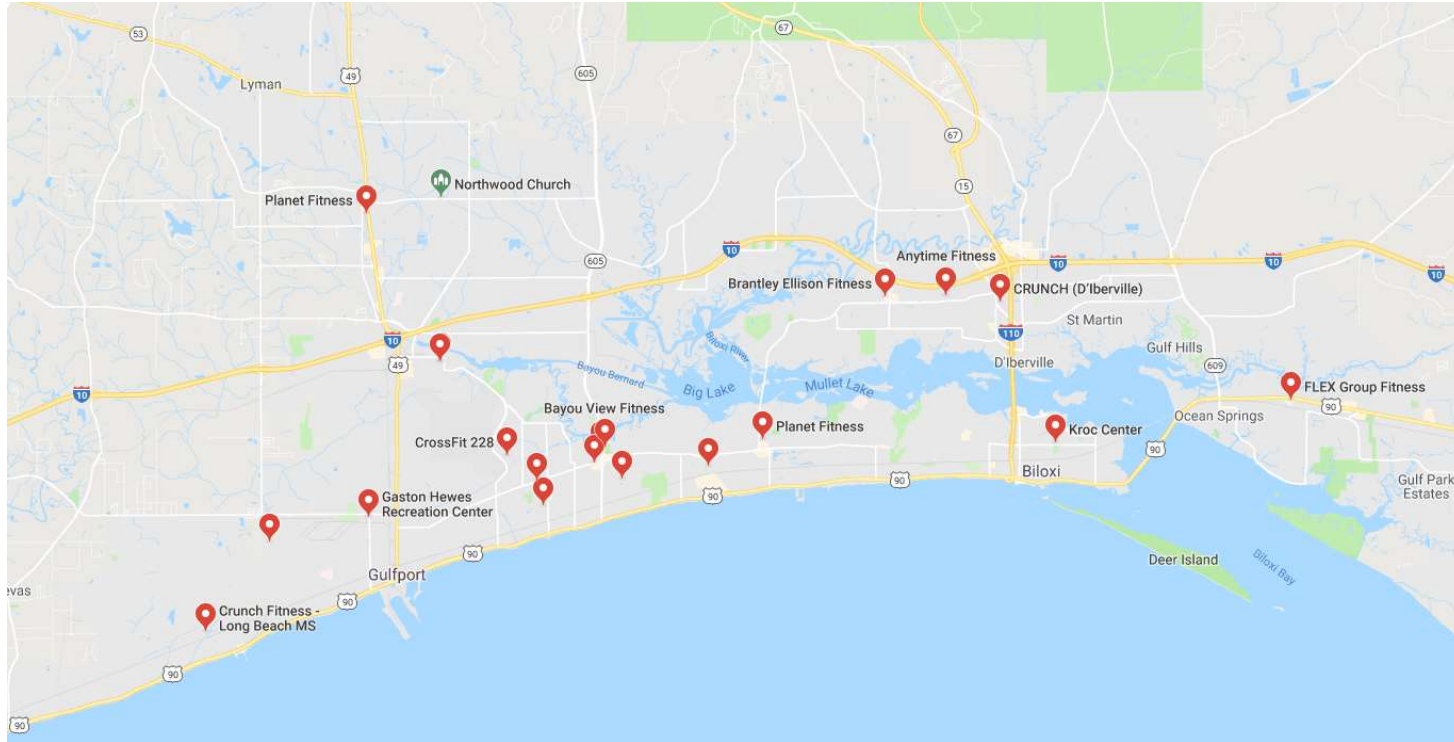
***The Y is a highly considered and perceived
as a High-Quality Low-Cost Youth
Development / Enrichment Services within
the community***



MARKET LANDSCAPE

GULFPORT – Like Providers

(H&W LIKE PROVIDERS – Within – 15 minute drive time of proposed sites)



Full H&W Center

- ☐ Planet Fitness (2-locations)
- ☐ Anytime Fitness
- ☐ Kroc Center
- ☐ CRUNCH

Specialty

- ☐ Gulfport CrossFit
- ☐ Wolfpack Athletics
- ☐ Fitness Center
- ☐ Iron Works Gym
- ☐ Yoga Barre
- ☐ Crunch Fitness
- ☐ Brantley Ellison Fitness

Specialty

- ☐ CrossFit228
- ☐ Rhodes Club Fitness
- ☐ CrossFit Portside
- ☐ Francis X Collins
- ☐ Bayou View Fitness
- ☐ Club4Fitness

Specialty

- ☐ Gaston Hewes Recreation Center

MARKET LANDSCAPE – BLOSSMAN

(H&W LIKE PROVIDERS – Within – 15 minute drive time of location)



Competitive Market with multiple “like providers” within a 20 minute drive time

Big Box Locations:

- ☐ Planet Fitness (3 locations)
- ☐ Anytime Fitness

Group X Specialty

- ☐ Flex Group Fitness
- ☐ The Fieldhouse
- ☐ Bayou Pilates
- ☐ CRUNCH

Specialty Shops

- ☐ CrossFit's' (4 locations)
- ☐ Southern Elite Fitness
- ☐ Curves
- ☐ Total Woman Fitness Center

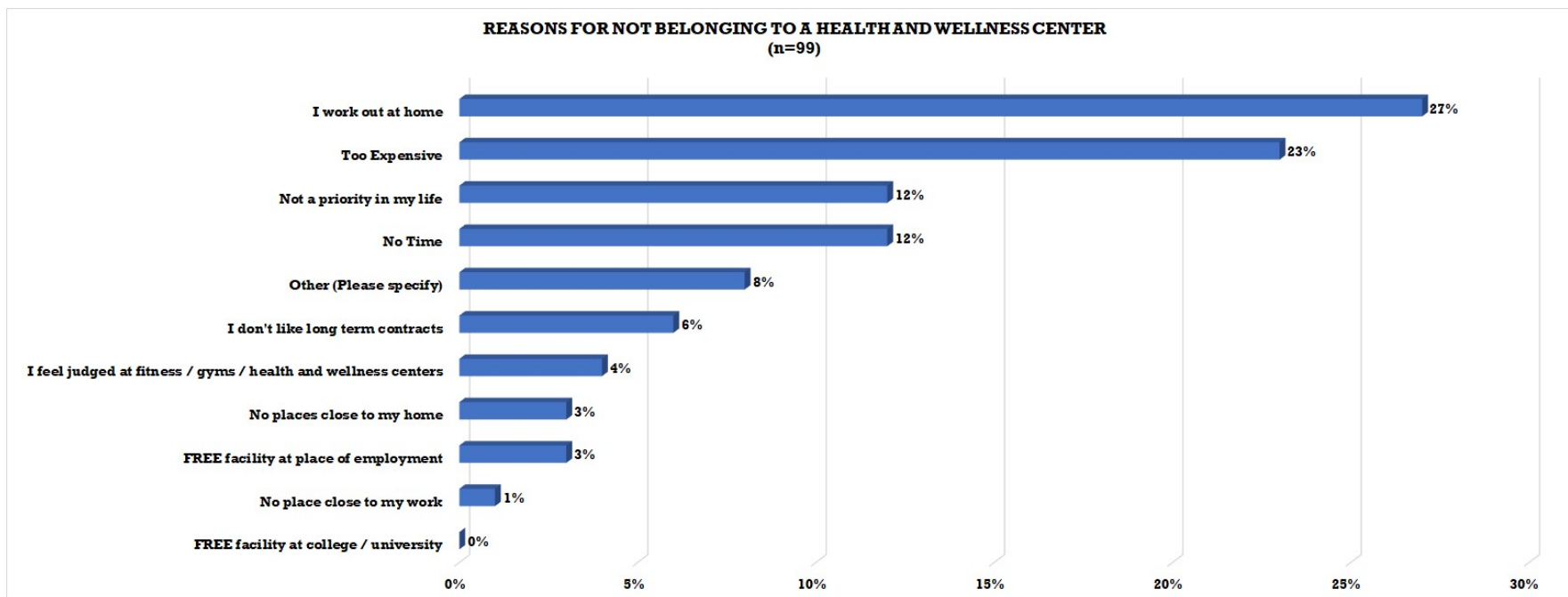
Personal Training:

- ☐ Patricia Anderson Freedom Fitness (personal training)
- ☐ Keith Hughes Boxing Club & Fitness

Youth Specialty:

- ☐ Jaxco Elite Gym (youth cheerleading)
- ☐ Cheer Force One

REASONS NOT HAVING MEMBERSHIP



Among the top reasons for those in the Gulf port community for not having a membership at any Health and Wellness center include: I work out at home and Too Expensive.

In both cases, the YMCA provides an avenue for them to become a member:

- ☐ Work out at Home – there are still a lot of social (non-fitness / physical) ways to stay connected to community [self-enrichment programs, volunteering, etc.)
- ☐ Too Expensive – Financial Aid & Stressing the value the Y brings (multiple programs under one-roof, convenience, free programs with membership, etc.)

VIEW OF THE Y (YMCA)

When asked respondents how strongly do you agree that a YMCA contributes to the quality of life in neighborhoods / communities?

**51% OF THE COMMUNITY
(STRONGLY AGREE / AGREES)**

**45/% NEITHER AGREE NOR
DISAGREE**

**75% OF MEMBERS
(STRONGLY AGREE / AGREES)**

**15/% NEITHER AGREE NOR
DISAGREE**

DEMOGRAPHIC ANALYSIS

Population Demographics

Popoulation	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
2010	70,898	154,155	63,091	148,367	58,778	143,613
2018	78,557	170,346	69,451	164,399	65,472	159,700
2023	81,189	175,993	71,761	169,884	67,691	165,098
Pop. Growth (2018/2010)	11%	11%	10%	11%	11%	11%
Pop. Growth (2023/2018)	3%	3%	3%	3%	3%	3%

Household Population	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
2010	28,109	59,266	25,180	57,348	22,281	55,584
2018	31,424	66,191	28,033	64,242	25,030	62,345
2023	32,641	68,766	29,122	66,748	26,005	64,776
HH Pop. Growth (2018/2010)	12%	12%	11%	12%	12%	12%
HH Pop. Growth (2023/2018)	4%	4%	4%	4%	4%	4%

Overall the population size, especially the Household Population size and growth illustrates an area large enough to support a full-service Health and Wellness Center today but also into the future.

DEMOGRAPHIC ANALYSIS

Population Demographics

Family Dynamics	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Married w/ Children under 18	18%	18%	15%	18%	19%	19%
Single Parent w/ Children under 18	15%	16%	17%	16%	18%	16%
Non-Family w/ Children under 18	0%	0%	0%	0%	0%	0%
Married w/o Children under 18	24%	23%	21%	23%	23%	25%

1/3 of the population have children under the age of 18 residing in their home.

Indicating a population that would support Youth Development Activities offered by the Y.

This market is also strong in key Y target age segments:

- **High % of Youth age 0-11**
- **relatively high teen market as well.**
- **Adults age 35 – 64 (targeted family age)**
- **Seniors age 65-74**

Age	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Median Age	35.7	34.4	34.9	34.6	34.3	35.3
Aged 0 to 5 Years	9%	9%	9%	9%	10%	9%
Aged 6 to 11 Years	8%	8%	8%	8%	8%	8%
Aged 12 to 17 Years	7%	8%	7%	8%	8%	8%
Aged 18 to 24 Years	10%	11%	11%	11%	9%	10%
Aged 25 to 34 Years	15%	15%	15%	15%	16%	15%
Aged 35 to 44 Years	13%	13%	12%	12%	13%	13%
Aged 45 to 54 Years	14%	14%	14%	14%	14%	15%
Aged 55 to 64 Years	11%	11%	11%	11%	11%	11%
Aged 65 to 74 Years	7%	6%	7%	7%	6%	7%
Aged 75 to 84 Years	4%	4%	4%	4%	3%	4%
Aged 85 Years and Older	1%	1%	2%	1%	1%	1%

DEMOGRAPHIC ANALYSIS

Ages 3+ Enrolled in K-12)

	I-10 / 605 Exit		Gulfport HS		Orange Grove	
In-School by Type and Grade (Age 3+)	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Public (grades pre K - 12)	10,600	23,894	9,346	22,558	9,255	21,962
% Public to Total (Public + Private)	86%	86%	89%	86%	86%	84%
Enrolled Public Preprimary	6%	6%	7%	6%	8%	6%
Enrolled Public Kindergarten	9%	7%	8%	8%	7%	8%
Enrolled Public Grades 1-4	29%	30%	27%	30%	30%	30%
Enrolled Public Grades 5-8	25%	25%	27%	26%	26%	27%
Enrolled Public Grades 9-12	31%	31%	31%	30%	29%	30%
Private (grades pre K - 12)	1,794	3,738	1,109	3,792	1,531	4,301
% Private to Total (Public + Private)	14%	14%	11%	14%	14%	16%
Enrolled Private Preprimary	13%	18%	14%	18%	18%	16%
Enrolled Private Kindergarten	8%	8%	8%	9%	8%	10%
Enrolled Private Grades 1-4	25%	22%	14%	21%	21%	22%
Enrolled Private Grades 5-8	27%	30%	34%	28%	32%	27%
Enrolled Private Grades 9-12	27%	22%	29%	25%	21%	25%

With slightly over 2/5 (44%) of the population in grade 4 or lower, the Y's youth development programs are positioned well to address the needs of the community.

DEMOGRAPHIC ANALYSIS

Population Demographics

Income Characteristics	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Median HH Income	\$48,196	\$44,538	\$40,108	\$44,969	\$44,384	\$46,294
Average HH Income	\$69,238	\$61,816	\$57,200	\$62,469	\$61,224	\$64,063
Less than \$15,000	12%	15%	17%	15%	15%	14%
\$15,000 to \$24,999	12%	13%	14%	13%	12%	13%
\$25,000 to \$34,999	12%	13%	14%	12%	13%	12%
\$35,000 to \$49,999	15%	15%	16%	15%	15%	15%
\$50,000 to \$74,999	19%	18%	18%	18%	18%	18%
\$75,000 to \$99,999	11%	11%	8%	11%	10%	11%
\$100,000 to \$124,999	7%	7%	5%	7%	7%	8%
\$125,000 to \$149,999	4%	3%	2%	3%	3%	4%
\$150,000 to \$199,999	4%	3%	3%	3%	3%	4%
\$200,000 and Over	3%	2%	3%	2%	3%	3%

Population in Poverty	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
% in Poverty	15%	18%	22%	18%	19%	17%

With just under 2/5 (37%) of the population earning less than \$35K a year and with just under 1/5 at poverty levels, the market is in need of services to allow for economic growth and upward mobility both for themselves and future generations.

DEMOGRAPHIC ANALYSIS

Population Demographics

	I-10 / 605 Exit		Gulfport HS		Orange Grove	
Employment Characteristics (Age 16+)	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Civilian	57%	55%	54%	55%	55%	55%
Military	2%	5%	3%	5%	2%	3%
Unemployed	5%	5%	5%	5%	5%	5%
Not in Labor Force	35%	35%	38%	35%	38%	36%

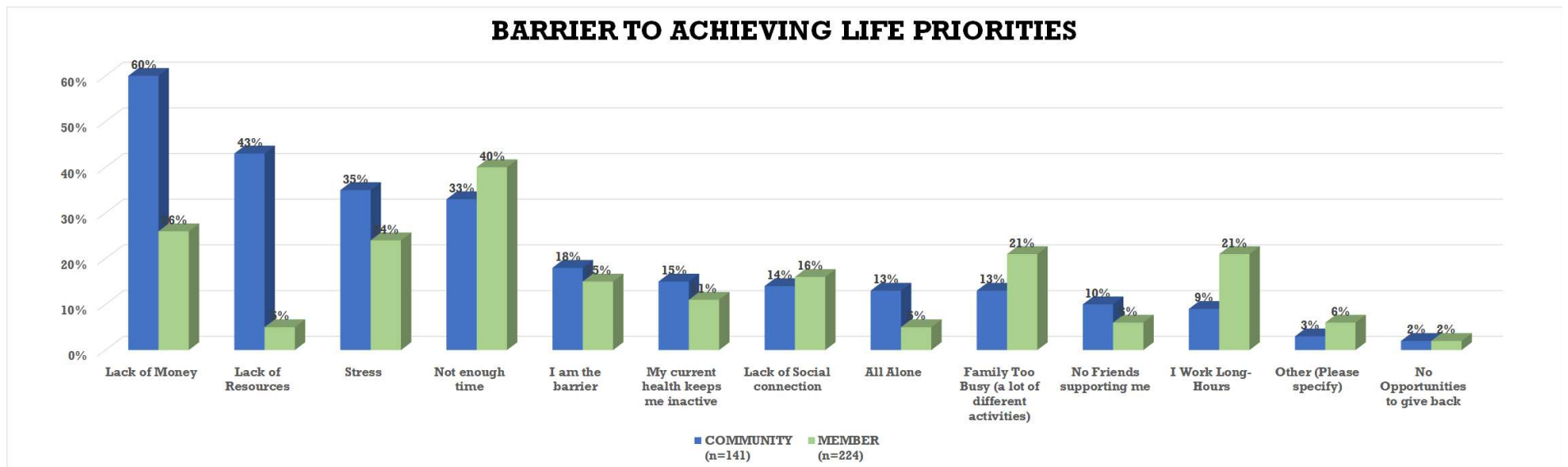
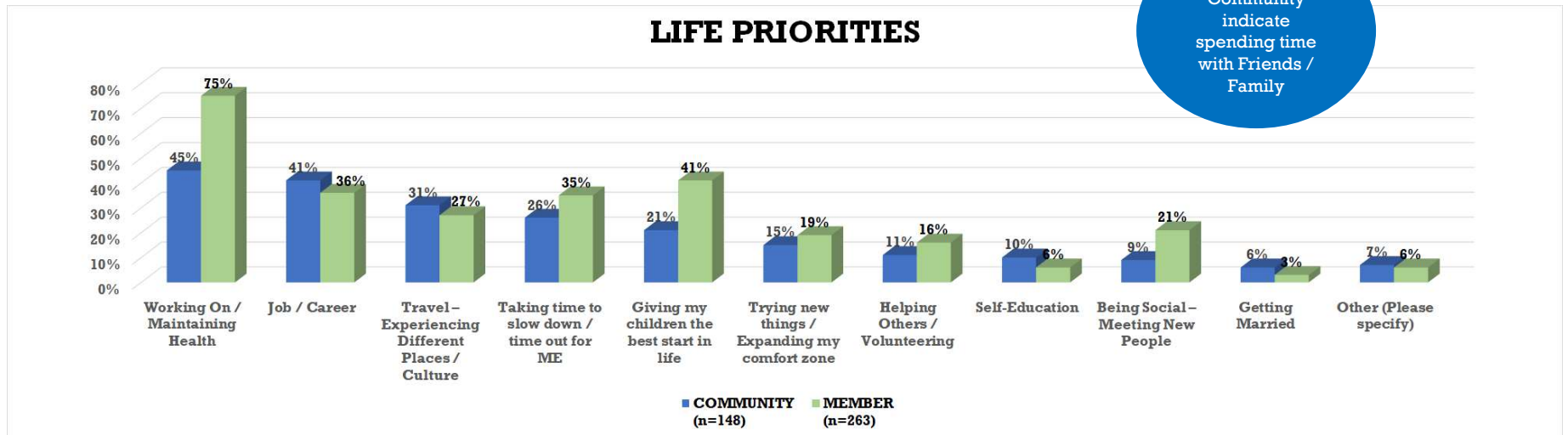
	I-10 / 605 Exit		Gulfport HS		Orange Grove	
Transportation	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Car, Truck, Van	96%	96%	95%	96%	96%	96%
Public	1%	1%	1%	1%	1%	1%
Ferry	0%	0%	0%	0%	0%	0%
Taxi	0%	0%	0%	0%	0%	0%
Motorcycle	0%	0%	0%	0%	0%	0%
Bicycle	0%	0%	0%	0%	0%	0%
Walked	2%	2%	3%	2%	2%	2%
Other Transportation	1%	1%	1%	1%	1%	1%

	I-10 / 605 Exit		Gulfport HS		Orange Grove	
Travel Time to Work	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Less than 15 Min	30%	33%	35%	33%	30%	30%
15-29 Min	47%	44%	43%	44%	46%	44%
30-59 Min	17%	17%	16%	18%	18%	20%
60-89 Min	2%	2%	2%	2%	2%	2%
90+ Min	2%	2%	2%	2%	2%	2%
Work at Home	2%	2%	2%	2%	2%	2%

As we look forward in our analysis, you will see that a primary preference in a health and wellness facility is convenience defined as close to home or work.

With close to half of the market traveling under 30 minutes to work, the I-10 / Hwy 605 area becomes even more desirable.

LIFE PRIORITIES

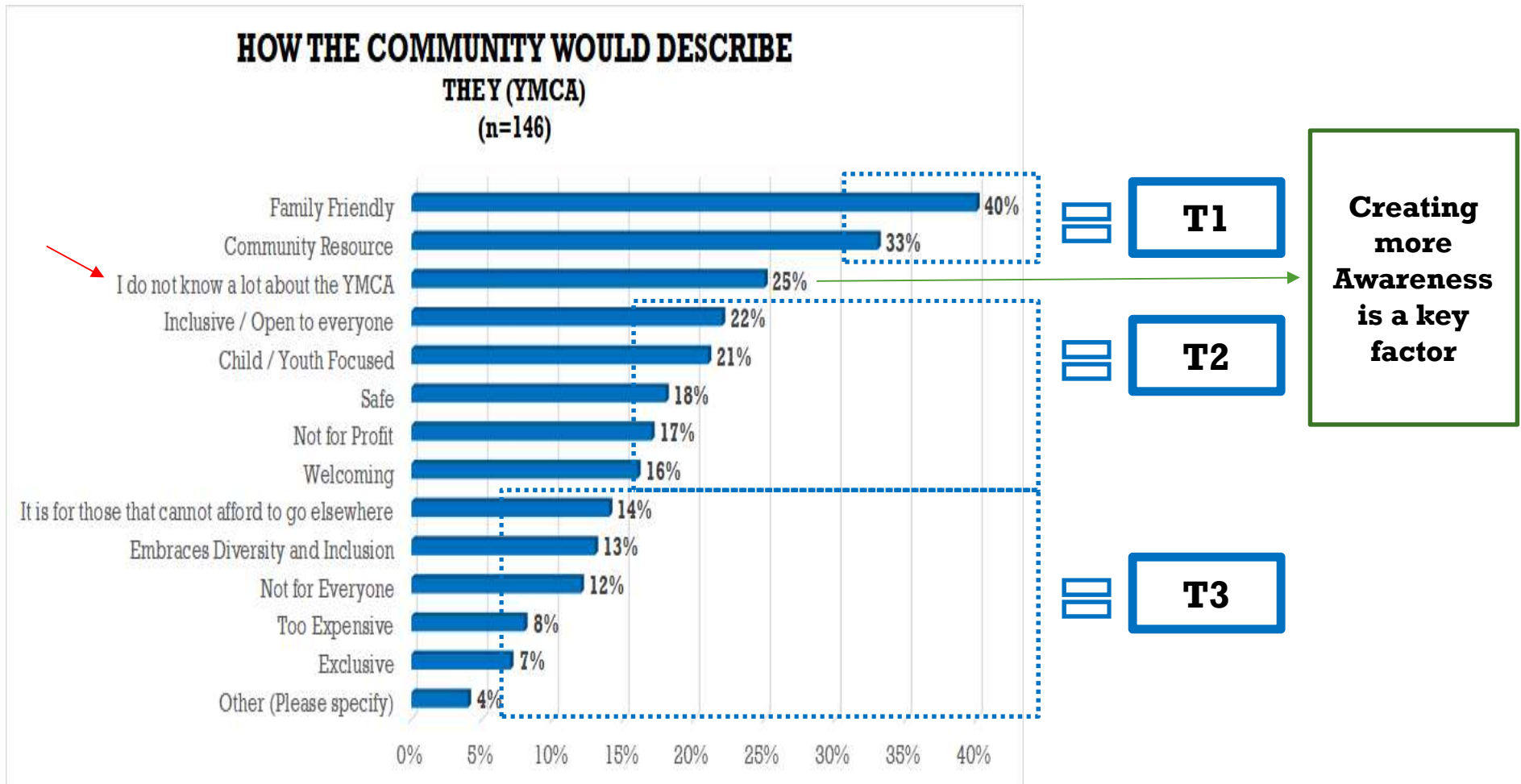




PERCEPTION / CONSIDERATION OF THE YMCA

NEW LOCATION

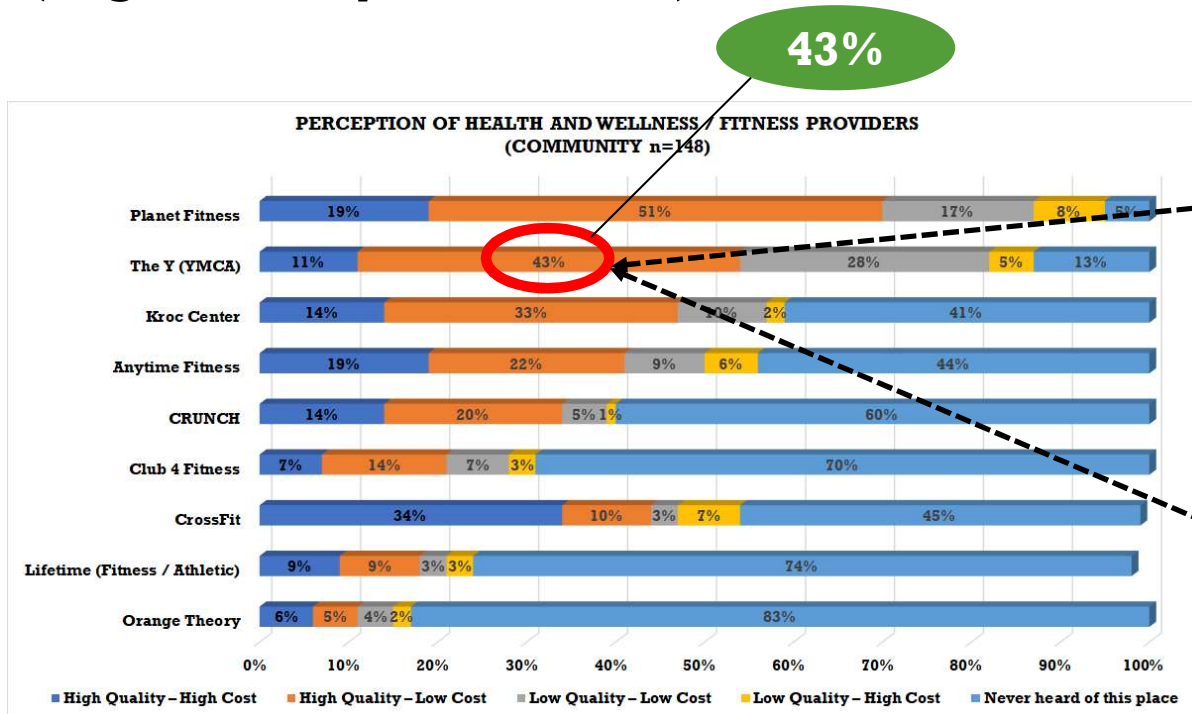
VIEW OF THE Y (YMCA)



One-fourth of the community respondents indicate they do not know a lot about the Y, however among those that do,

PERCEPTION – Health and Wellness Providers

(High Quality / Low Cost)



Member Preception: Pre-Joining (n=351)	%
High Quality - High Cost	23%
High Quality - Low Cost	23%
Low Quality - High Cost	7%
Low Quality - Low Cost	7%
Didn't know much about the Y (YMCA) before joining	38%
Other (Please specify)	4%

Member Preception: Post-Joining (n=342)	%
High Quality - High Cost	20%
High Quality - Low Cost	61%
Low Quality - High Cost	6%
Low Quality - Low Cost	3%
Other (Please specify)	11%

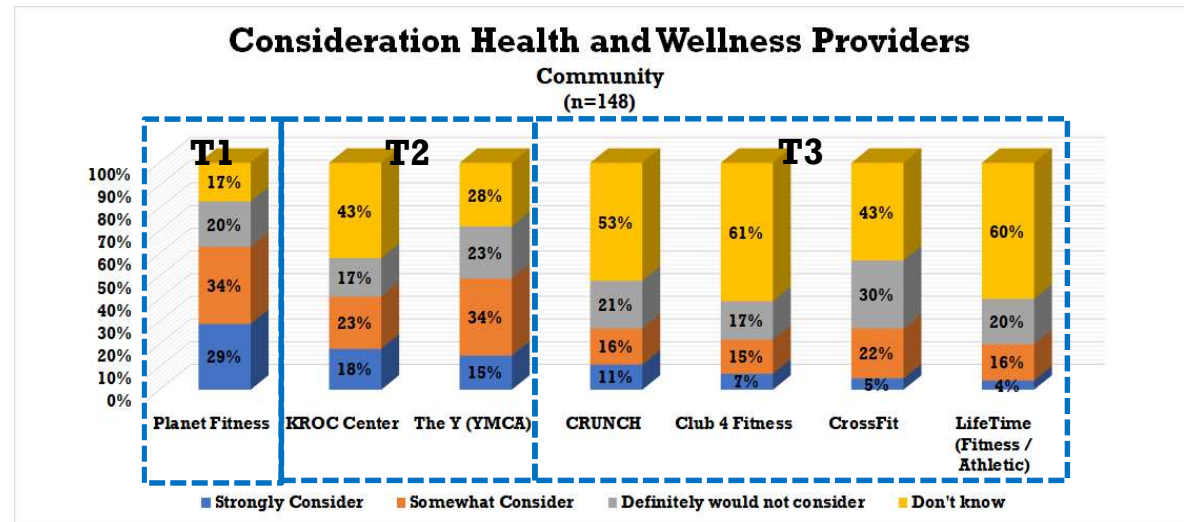
With the Y's focus on being a High Quality / Low Cost provider, the Y along with Planet Fitness are seen significantly higher the other providers in the area within the community with 43% of respondents scoring them this way – significantly higher than what even current members perceived them prior to joining (23%).

Sixty-one percent of current members see the Y as a High Quality / Low Cost Provider. A significant increase over their Pre-Joining rating.

CONSIDERATION

(HEALTH AND WELLNESS)

67% of Non-Y Community Survey do not currently have a membership at a Health and Wellness Center



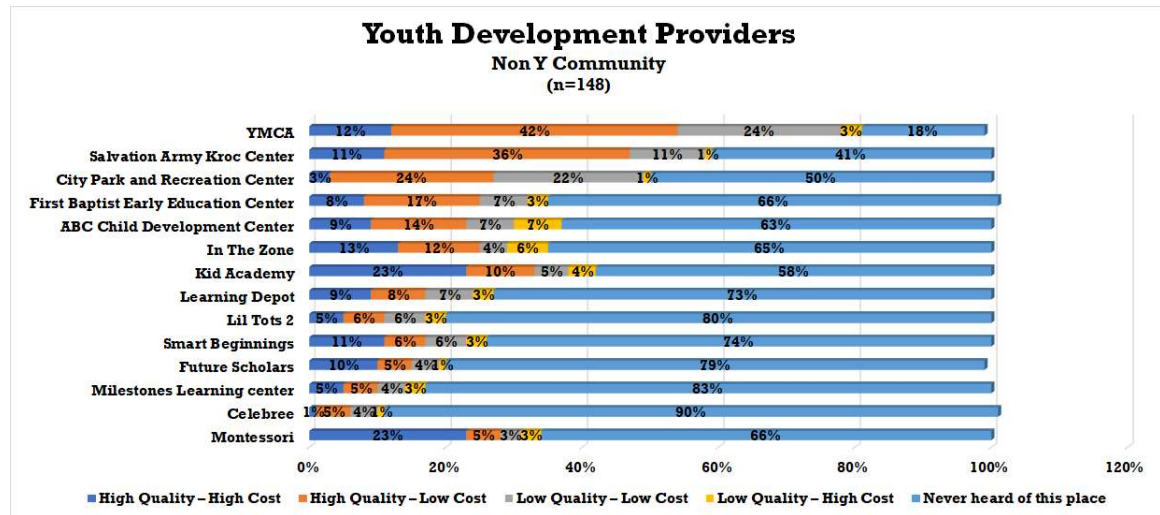
Overall, Planet Fitness is significantly considered over other organizations if the Non-Y community was in the market today.

The YMCA and the KROC center are in Tier 2 consideration.

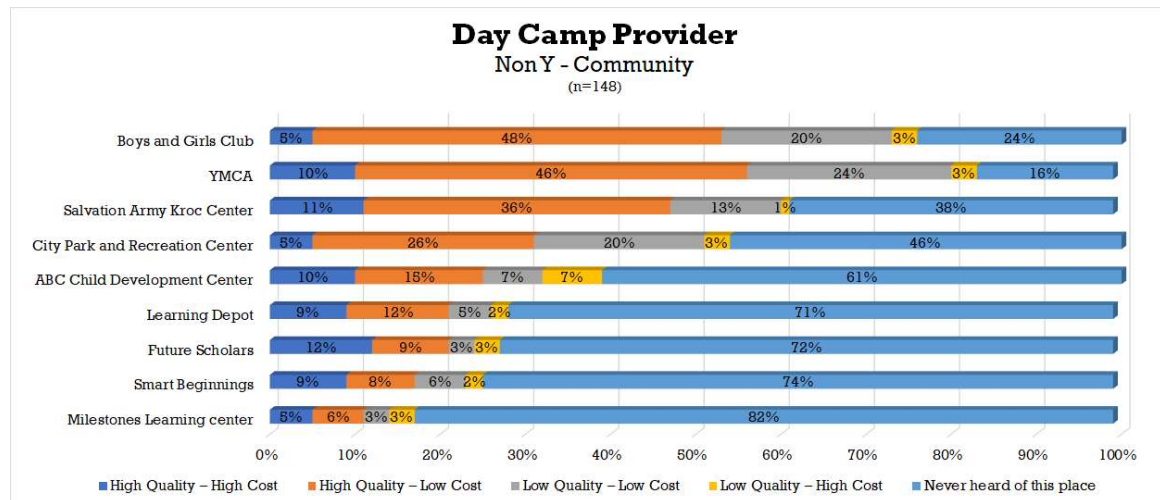
Overall, other information collected suggests that, although some may consider Planet over the Y, they also may not know all the programs and services the Y offers and therefore cannot make a fair assessment.

PERCEPTION

(YOUTH DEVELOPMENT & SPORTS)



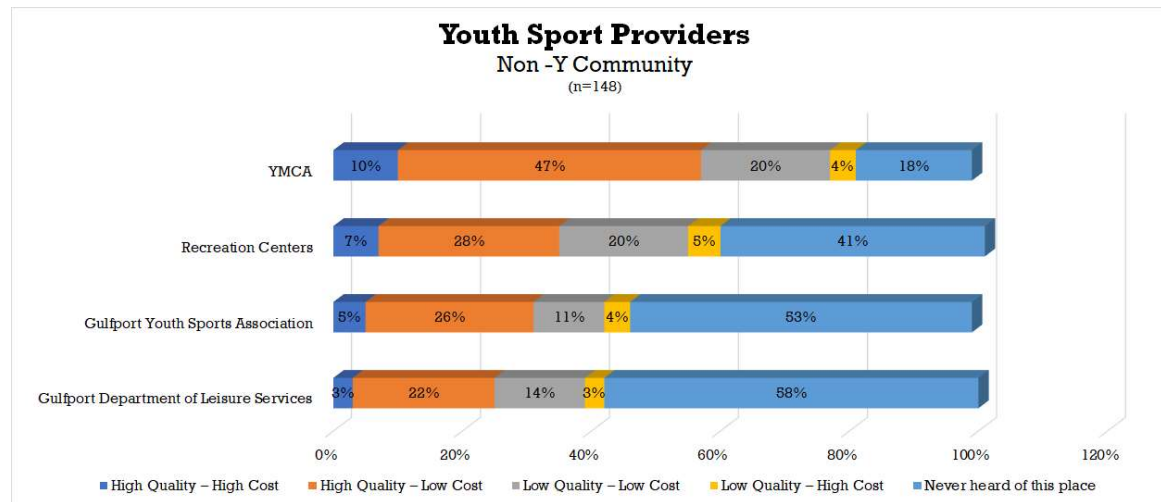
YMCA and Salvation Army are significantly viewed as a High Quality / Low Cost Provider for Youth Development programs over other providers listed.



Along with the Boys and Girls Club the YMCA is seen as a high quality / low cost provider over the other entities listed.

PERCEPTION

(DAY CAMP)



The YMCA is seen as a high quality low cost provider for Sports over other providers listed.

CONSIDERATION

(n=148)

Rank	PRE-SCHOOL	%
1	Local Church / Place of Worship	13%
2	ABC Child Development Center	12%
3	Montessori	9%
4	Smart Beginnings	9%
5	Kid Academy	8%
6	Lil Tots 2	8%
7	Milestones Learning Center	7%
8	YMCA	6%
9	Learning Depot	5%
10	Future Scholars	5%
11	Boys and Girls Club	4%
12	Salvation Army Kroc Center	4%
13	In the Zone	4%
14	City Parks and Rec Centers	3%
15	Celebree	2%
16	Gulfport Department of Leisure Services	1%

Rank	BEFORE AND AFTER SCHOOL	%
1	Boys and Girls Club	14%
2	YMCA	12%
3	Local Church / Place of Worship	11%
4	Salvation Army Kroc Center	9%
5	City Parks and Rec Centers	7%
6	Future Scholars	6%
7	In the Zone	6%
8	Montessori	5%
9	Gulfport Department of Leisure Services	5%
10	Kid Academy	5%
11	ABC Child Development Center	5%
12	Learning Depot	3%
13	Milestones Learning Center	3%
14	Smart Beginnings	3%
15	Lil Tots 2	2%
16	Celebree	2%

Rank	YOUTH SPORTS	%
1	City Parks and Rec Centers	18%
2	YMCA	16%
3	Local Church / Place of Worship	11%
4	Salvation Army Kroc Center	10%
5	Gulfport Department of Leisure Services	9%
6	Boys and Girls Club	7%
7	In the Zone	5%
8	Future Scholars	4%
9	Kid Academy	4%
10	Learning Depot	4%
11	Montessori	3%
12	Milestones Learning Center	2%
13	ABC Child Development Center	2%
14	Lil Tots 2	2%
15	Smart Beginnings	1%
16	Celebree	1%

Rank	DAY CAMP	%
1	Local Church / Place of Worship	16%
2	YMCA	13%
3	Boys and Girls Club	12%
4	Salvation Army Kroc Center	12%
5	City Parks and Rec Centers	7%
6	In the Zone	6%
7	Gulfport Department of Leisure Services	5%
8	Kid Academy	5%
9	Montessori	4%
10	Milestones Learning Center	4%
11	Future Scholars	4%
12	ABC Child Development Center	3%
13	Learning Depot	3%
14	Smart Beginnings	2%
15	Lil Tots 2	2%
16	Celebree	1%

Rank	OVERNIGHT CAMP	%
1	Local Church / Place of Worship	27%
2	Salvation Army Kroc Center	14%
3	YMCA	11%
4	Boys and Girls Club	8%
5	City Parks and Rec Centers	6%
6	Future Scholars	6%
7	Kid Academy	6%
8	Celebree	5%
9	Gulfport Department of Leisure Services	4%
10	In the Zone	3%
11	Smart Beginnings	2%
12	Milestones Learning Center	2%
13	Montessori	2%
14	ABC Child Development Center	1%
15	Lil Tots 2	1%
16	Learning Depot	0%

CONSIDERATION

(n=178)

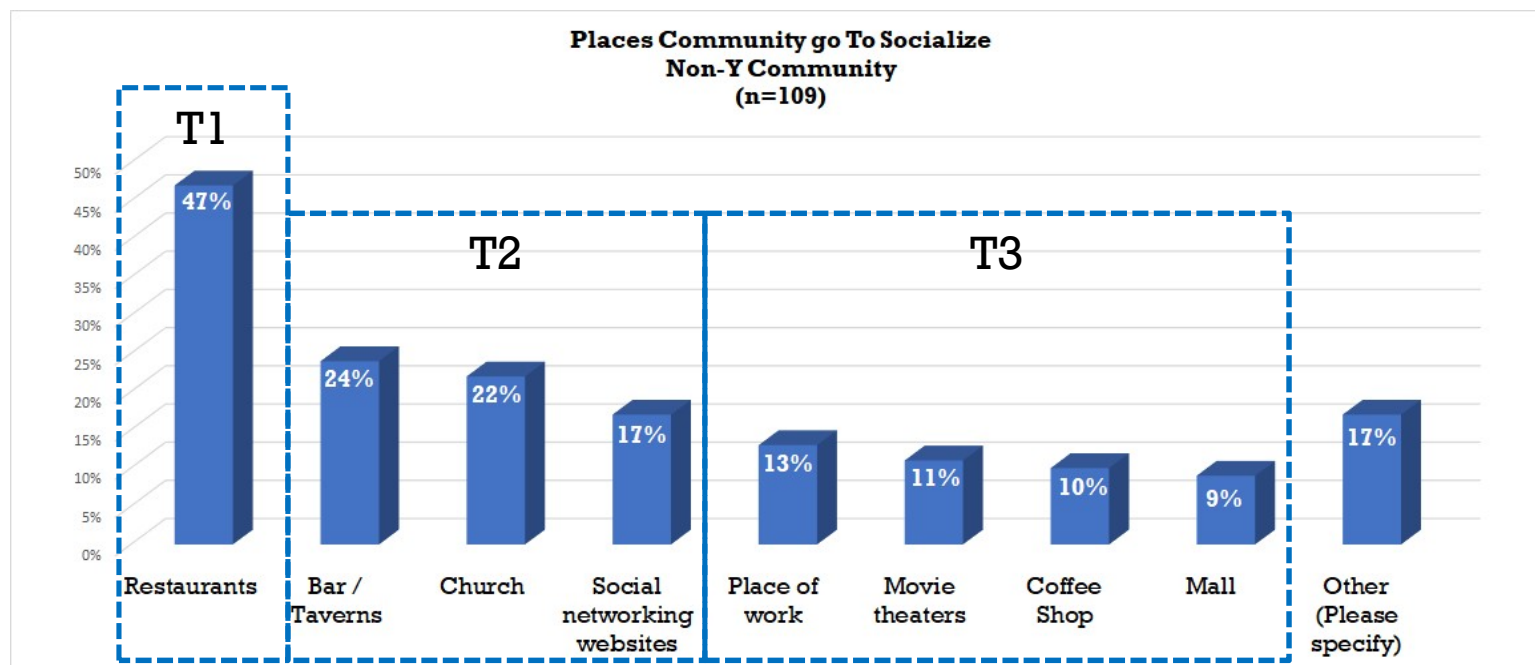
Rank	WOULD NOT CONSIDER PROVIDER	%
1	Lil Tots 2	8%
2	Celebree	8%
3	Gulfport Department of Leisure Services	8%
4	Learning Depot	7%
5	ABC Child Development Center	7%
6	Kid Academy	7%
7	Salvation Army Kroc Center	7%
8	Milestones Learning Center	7%
9	Smart Beginnings	6%
10	Montessori	6%
11	Local Church / Place of Worship	6%
12	In the Zone	5%
13	YMCA	5%
14	Future Scholars	5%
15	Boys and Girls Club	5%
16	City Parks and Rec Centers	5%

Rank	I DON'T KNOW THEM	%
1	Celebree	9%
2	Learning Depot	8%
3	Milestones Learning Center	7%
4	Future Scholars	7%
5	Smart Beginnings	7%
6	In the Zone	7%
7	Lil Tots 2	7%
8	Montessori	7%
9	Gulfport Department of Leisure Services	6%
10	Kid Academy	6%
11	ABC Child Development Center	6%
12	City Parks and Rec Centers	5%
13	Salvation Army Kroc Center	5%
14	Boys and Girls Club	5%
15	Local Church / Place of Worship	4%
16	YMCA	4%



NEED FOR SOCIAL CONNECTIONS

BEING SOCIAL (WHERE FAMILY AND FRIENDS GATHER TO CONNECT)



The data outlined below highlights two reoccurring themes that the Y has an opportunity to enhance programming and communication efforts:

- 1) The importance of Food (Restaurants, Bar and Taverns) as a social connectively factor and to bring the community, family and friends together.
- 2) Just over 1/5 (22%) indicate church, which indicates partnership in both solving community / social issues, but also partnering for volunteering and like focus programming.
- 3) Social Networking Website (17%), which is how people stay connected. The Y needs to do a better job offering discussion boards and blogs on their website for the community to dialogue and connect, as well as the Y to get feedback on changes needed from a programming or community perspective.

LIFESTAGE

Understanding LifeStage provides insights of what the community is seeking at their stage in life

- Retirement = around 1/3 of both Non-Y and Y community are at this stage which indicates that they are more prone for volunteering or donating.
- Dedication & Commitment = a need of work / life balance – what can the Y do to fulfill this need?
- Exploratory and Self-Discovery = as highlighted in a previous slide – Adult Enrichment classes, field trips, creating those memorable experiences.

LIFESTAGE	NON-Y COMMUNITY (n=148)
Retirement and Passing Down [Your Legacy / Planning]	35%
Exploratory and Self-Discovery [adventurous - finding out who you are as a person - being comfortable with who you are / being an individual]	29%
Dedication & Commitment [Priority Setting - working hard to accomplish goals]	29%
Mirroring and Education [building a foundation of knowledge and learning to fit in]	7%

LIFESTAGE	YMCA MEMBER - PROG. (n=250)
Dedication & Commitment (Priority Setting - working hard to accomplish goals)	47%
Retirement and Passing Down (Your Legacy / Planning)	28%
Exploratory and Self-Discovery (adventurous -finding out who you are as a person - being comfortable with who you are / being an individual)	23%
Mirroring and Education (building a foundation of knowledge – learning to fit in)	2%

LIFESTYLE

Understanding how people self-identify their lifestyle provides insights into the marketing messages that will best resonate with them to take action and be part of the YMCA community. Whether as a Full-Facility Member, Volunteer or Donor, the insights in these tables provide insights on what will work to gain support on Y's mission objectives.

LIFESTYLE	NON-Y COMMUNITY (n=148)
Care-Giver [gets satisfaction from making other people happy]	38%
Team Player [satisfaction by being part of a group of like-minded people who share common goals & interests – part of something bigger than themselves]	30%
Adventurer [satisfaction from memorable experiences]	28%
Creative Mind [satisfaction from the process of creation, of imagining something and then implementing it in a way which accurately reflects what they saw in their mind]	28%
Heart on Sleeves [Immersing themselves in the emotion of the moment]	18%
Activist [must have a cause to believe in and fight for]	11%
Social Butterfly [satisfaction comes from interaction from a wide variety of people – they go deep in understanding the people around them – extroverts]	9%

LIFESTYLE	YMCA MEMBER - PROG. (n=252)
Team Player [satisfaction by being part of a group of likeminded people who share common goals & interests – part of something bigger than themselves]	39%
Care-Giver [gets satisfaction from making other people happy]	35%
Adventurer [satisfaction from memorable experiences]	30%
Creative Mind [satisfaction from the process of creation, of imagining something and then implementing it in a way which accurately reflects what they saw in their mind]	21%
Social Butterfly [satisfaction comes from interaction from a wide variety of people – they go deep in understanding the people around them – extroverts]	15%
Heart on Sleeves [Immersing themselves in the emotion of the moment in a way that is obvious to everyone around them.	8%
Activist [must have a cause to believe in and fight for]	7%

One can infer from these ratings key messaging and programming insights.
(volunteering at a program on a schedule)

Messaging that would resonate most with the community seem to be centered around the Mission aspect of the Y, either through donating or volunteering get involved (caregiver = children) therefore Youth Development programming.

Team player / Adventure indicate a need to be social, to have social interaction, meet new people.

Team player want to get involved to solve something to make a difference, where Adventurer ratings want something different (field trips, different programming (i.e. ninja warrior training obstacles, etc.)

DESIRED ACTIVITIES IN LIFE

Desired Activities in Life	NON-Y COMMUNITY (n=148)
Spend time together playing games	38%
Eating together outside of the home	34%
Eating together at home	28%
Cooking together	26%
Movie at a theatre	26%
Exercise together	25%
Go to church	25%
At-home movie night	19%
None of the above	18%
Watch TV together	14%
Retail shopping	12%
Grocery shopping	10%
Work on homework	5%

T1

T2

T3

COMMON THEMES

- PLAYING GAMES / FUN UNDER ONE-ROOF
- FOOD IS A THEME (EATING TOGETHER / COOKING)

- MOVIES

ALL OF THE ITEMS HIGHLIGHTED ABOVE CAN BE ACTIVITIES OFFERED BY THE YMCA...

- Family Room / Teen Center
- Movie Night
- Food Court / Eating Area / Chef's kitchen

Desired Activities in Life	YMCA MEM - PROG (n=246)
Spending time together playing/exercising	49%
Go to church	22%
None of the above	22%
Cooking together	21%
Eating together at home	15%
Eating together outside of the home	15%
Movie at a theater	13%
At-home movie night	10%
Retail shopping	8%
Others	7%
Watch TV together	5%
Grocery shopping	4%
Work on homework	2%

T1

T2

T3



MEMBER SATISFACTION LEVELS



DISCRETIONARY INCOME SPEND COMPARISON

(DISC)

DISCRETIONARY INCOME SPEND COMPARISON – INDEX **(DISC)**

The DISC – Index, developed by Greater Than Analytics LLC, is designed to give organizations an idea of how the members of the communities / market in which they operate spend their discretionary income.

The insight derived from the findings, allow organizations to examine their products, programs and / services against the rates they charge for these items, to assess the value or differentiation, in what they offer to compel the choice in their favor.

The analysis also provide organizations of the “real” choices their consumers face between what we deem “living expenses” (food, health, shelter, transportation and clothing) to those “extras.”

DISC Analysis

(Discretionary Income Spend Comparison - Index)

BASED ON A 20 MINUTE DRIVE TIME FROM Gulfport, Mississippi (Herbert Wilson Comm. Center)	
MEDIAN HH INCOME	MONTHLY DISCRETIONARY INCOME (AFTER TAXES)
\$42,786.00	\$2,781.09
AVERAGE CURRENT MEMBER RATE (Excludes Youth Membership)	\$46
Health and Wellness DISC - Index	93
Average Other DISC - Index	167

AVG. TOTAL MONTHLY LIVING EXPENSES: (Food, Health, Shelter, Transportation)	\$1,935
---	---------

Non-Essentials / Choice Items:	Average Monthly Expense
Alcoholic beverages	\$19
Going out to Eat	\$120
Entertainment	\$161
Personal care products & services	\$35
Reading	\$3
Education	\$64
Tobacco products & smoking supplies	\$26
Miscellaneous	\$35
Cash contributions	\$75
Personal insurance & pensions	\$265
Gym Membership	\$43
Total Non-Essentials - Choice Items:	\$846

BASED ON A 20 MINUTE DRIVE TIME FROM Gulfport, Mississippi (Herbert Wilson Comm. Center)	
MEDIAN HH INCOME	MONTHLY DISCRETIONARY INCOME (AFTER TAXES)
\$42,786.00	\$2,781.09
AVERAGE CURRENT MEMBER RATE (based on potential 2020 Rate Increase) (Excludes Youth Membership)	\$47
Health and Wellness DISC - Index	91
Average Other DISC - Index	163

Overall, based on the DISC analysis, it appears that the current MS Gulf Coast Member Rates are on par with current rates of other health and wellness entities in the area, as considerably lower than what the community is currently spending on those “extra” commodities.

The Table below, in examining a possible rate increase for 2020 (average rate increase by \$1), highlights that there is a minor shift downward shift in spending but not enough to warrant any concern.

Although a minor shift will occur with a price adjustment, it is recommended that MS Gulf Coast YMCA, continue to develop a strategy that...

- 1) Highlights the benefits and its differentiators to the market as to why a higher rate is justified.
- 2) Consider adding an additional rate for single parents based on market demographics and relieve the dependency on financial aid.
- 3) Promote and Budget for the potential increase in financial aid recipients.

It is not recommended at this time that YMCA should adjust (lower) rates for this area and keep all membership rates consistent across all locations.



MEMBER RATE ANALYSIS (LITE)

MEMBER RATE ANALYSIS (Lite):

Greater Than Analytics pricing analysis takes into multiple factors such as market landscape, income (discretionary income – factors), like-provider landscape and market penetration factors to name a few. It is critical to note that the assessment done here is what we deem a LIGHT rate analysis and a more comprehensive analysis is available which dives deeper into operational and market factors that impact how organizations price their goods and services.

***Market Ultimately
Sets the Rate***



***Operational
Efficiencies allow for
the ability to price
competitively***

Note: The following slides offer suggestions based on the information provided by an optimal price point to maximize both sales and revenue. This should be viewed as a starting point for further discussion, and incorporated into your organizations overall marketing and operational strategies in order to accomplish mission and margin objectives while securing their sustainability and relevancy in the markets today and into the future.

SETTING A PRICE

(Pricing Strategy Rules)

RULE #1

Market Sets the Rate

The amount charged for a good or service is ultimately set based on the amount your consumer base is willing to pay for the goods and services you offer. Essentially the Value they see in what you offer over another item. This other item can be anything from living expenses to those "extra" items that make our lives enjoyable and not just those other items that reside within your space.

RULE #2

Part of an Overall Strategy

The price an organization choose to put on their goods and services should be thought of strategically, beyond merely revenue to offset costs, but to be viewed as part of an overall strategy to support mission and margin objectives, to secure sustainability and relevancy.

RULE #3

Price is an Extension of Brand

Regardless of the value you place on your brand, the market also puts a value on your offering and views brands in a way that places an "artificial" perceptual CAP as to what they are willing to pay for what you offer.

RULE #4

Avoid ending in 0's and 5's

There is a reason why so many organizations use 9's or 1's or 4's or 6's when pricing their goods and services. It is based on how our brains interpret or perceive 0's and 5's to ultimately being higher than other numbers they can select from.

ESTIMATED PRICING FOR 2020

Mississippi Gulf Coast YMCA			
2020 PROPOSED PRICING STRUCTURE			
	<u>2019</u>	<u>var</u>	<u>2020</u>
SINGLE ADULT	\$39	\$2	\$41
FAMILY	\$59	\$2	\$61
YOUTH	\$15	\$1	\$16
SENIOR SINGLE	\$35	\$1	\$36
SENIOR COUPLE	\$49	\$2	\$51

Although raising rates on seniors, based on the model should not have a negative impact on new member acquisition another options by may to lower rates of senior single by \$1 (\$34) and keep Senior Couple the same – the growth in volume anticipated (seniors stay longer) should increase revenue overall...this assume it is part of a comprehensive strategy to promote the value of the Y and its differentiators in the market.

Note: The model predicts based on historical trends, and it is important to take into consideration the totality of all information and strategic goals to determine the right rate to offer consumers. Also, when increases are highlighted, this reflects a threshold (cap) for the market but does suggest in any way that you need to hit that cap to achieve goals.

Additional Membership Types

Findings Suggest the Following Add-on's be considered for Membership Types

**Single Parent
(1 – Adult No
Dependents)**

Rate: \$52 / mo.
*(more analysis is needed to
determine exact rate)*

**2 – Adults
No Dependents**

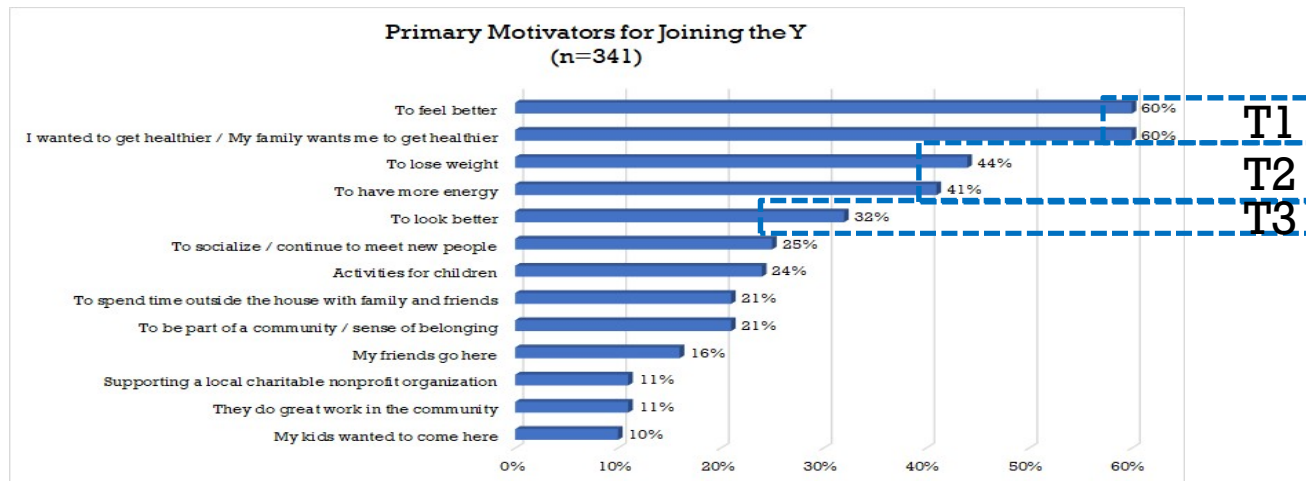
Rate: \$54 / mo.
*(more analysis is needed to
determine exact rate)*



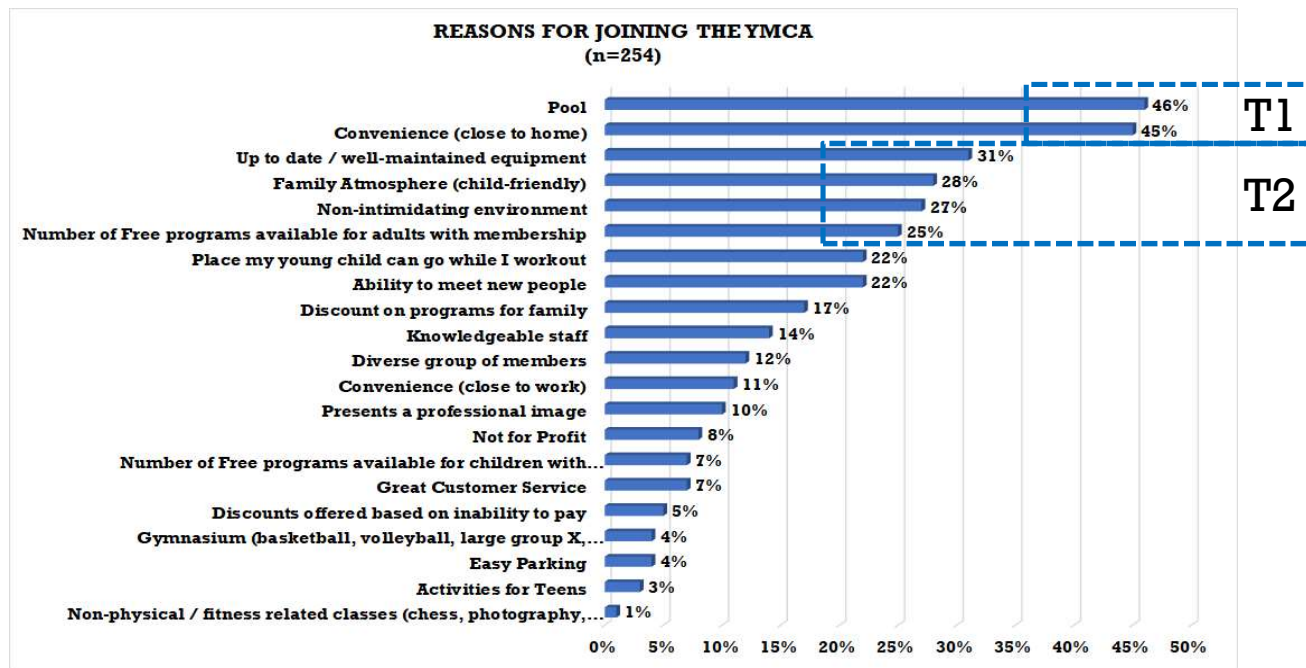
CURRENT MEMBERS

Reasons for Joining /
Staying

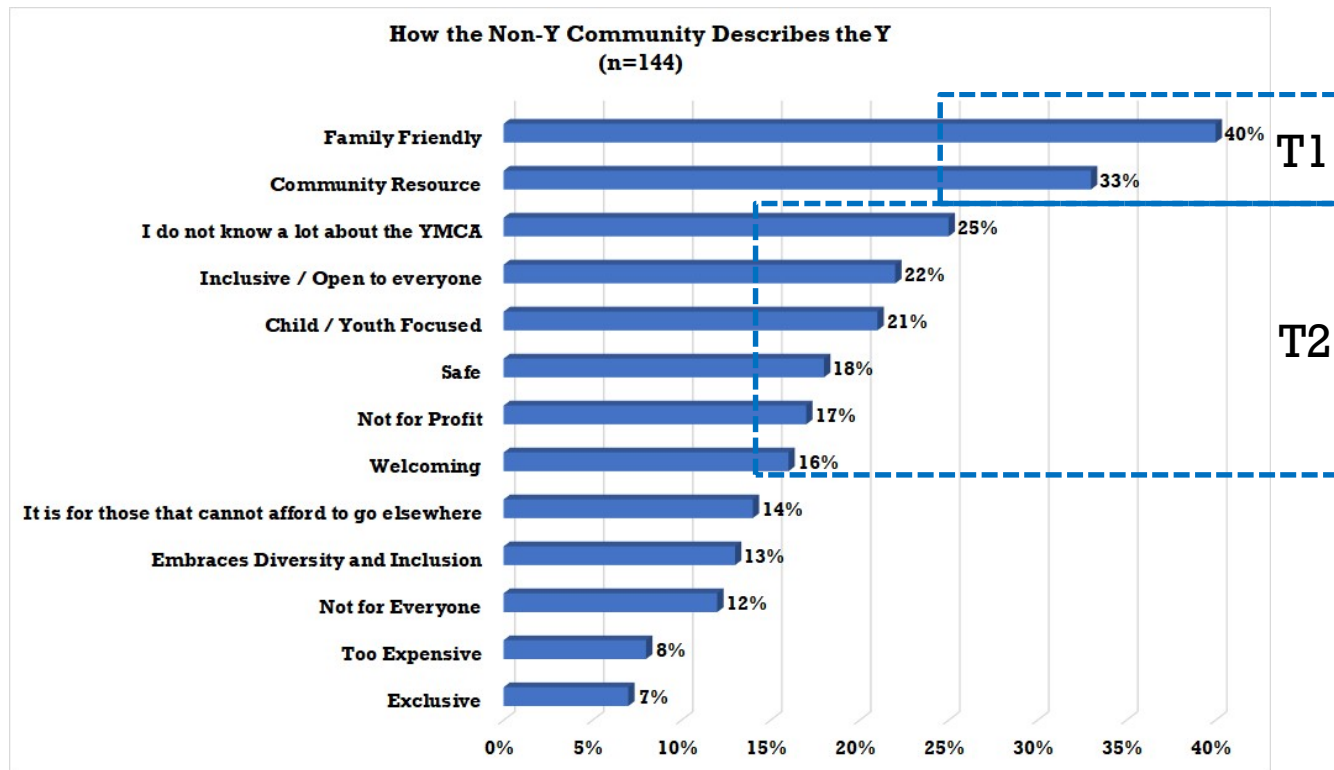
REASONS FOR JOINING THE YMCA



Understanding both motivators and reasons for joining the Y from Current Members will provide a roadmap for how to communicate to the Non-Y Community to build awareness and consideration.



HOW THE NON-Y COMMUNITY DESCRIBES THE Y



When thinking of marketing or establishing a connection with the Non-Y Community, using words such as “Family Friendly,” “Community Resource,” that they already associate with the Y in a marketing strategy is a critical first step.



MEMBER / PROGRAM PARTICIPANT SATISFACTION

Membership Satisfaction Ratings: (n=282)

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
I feel safe at the Y	92%	62%	30%	4%	0%	2%	2%	1%
The Y is clean and well maintained	92%	54%	38%	5%	1%	2%	3%	0%

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
I feel that the staff believe in the work the Y does in my community	63%	28%	35%	29%	1%	2%	3%	6%
I receive support achieving my health and wellness goals	47%	17%	30%	28%	8%	6%	14%	11%
Staff members have actively introduced me to other members	24%	12%	12%	24%	28%	17%	45%	7%
I feel that I belong	71%	31%	40%	23%	3%	2%	5%	1%
I feel that the instructors believe in the work the Y does in my community	63%	25%	38%	23%	0%	1%	1%	13%
I like the way they communicate with me	67%	26%	41%	22%	4%	2%	6%	4%
I discuss my (and my family's) goals with a health and wellness coach	13%	5%	8%	21%	25%	13%	38%	28%

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
Staff members have actively introduced me to other members	24%	12%	12%	24%	28%	17%	45%	7%
Parking is easy and accessible	39%	12%	27%	16%	30%	14%	44%	1%
I discuss my (and my family's) goals with a health and wellness coach	13%	5%	8%	21%	25%	13%	38%	28%
I usually have at least one friend that I work out with	42%	15%	27%	18%	22%	12%	34%	7%

Overall, the following information highlights areas where the MS Gulf Coast YMCA is Excelling (GREEN), areas that need to be addressed soon but not an urgent concern (YELLOW) and areas that need immediate attention (RED)

Since Top-2-Box, for Y's often masks issues impacting member / program experience this methodology is designed to highlight areas of concern so they can be proactively addressed.

Critical areas are to the left in RED – which outside of Parking, are related to ENGAGEMENT.

The following satisfaction levels all fall within levels that are neither concerning nor within positive ranges (i.e. Agree). Therefore it is critical to treat all of the items on the following page as areas where improvements are needed to ensure that overtime they grow to levels of green vs. downward to levels of Yellow and Red.

Membership Satisfaction Ratings:

n=282

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
There is enough equipment for everyone	76%	29%	47%	10%	9%	3%	12%	2%
The instructors make sure I am doing the exercise / movements correctly	59%	23%	36%	18%	5%	3%	8%	15%
My concerns are quickly addressed / resolved	58%	26%	32%	17%	3%	4%	7%	18%
I am extremely satisfied with my Y experience	81%	38%	43%	12%	5%	2%	7%	0%
I am extremely satisfied with the programs / services	76%	32%	44%	12%	5%	2%	7%	5%
The environment is appropriate for the program activities (e.g. not too noisy)	80%	27%	53%	9%	4%	3%	7%	4%
My membership is a good value	81%	39%	42%	11%	4%	2%	6%	1%
I feel comfortable asking staff members questions	82%	39%	43%	10%	4%	2%	6%	2%
The front desk is knowledgeable	81%	33%	48%	14%	2%	3%	5%	1%

Membership Satisfaction Ratings:

n=282

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
I feel welcomed	84%	43%	41%	11%	2%	2%	4%	0%
It is a fun place for me (and my family)	85%	43%	42%	11%	2%	2%	4%	0%
The floor staff are knowledgeable	72%	33%	39%	19%	1%	2%	3%	6%
The instructors motivate participants to succeed	69%	35%	34%	17%	2%	1%	3%	11%
Registering for programs is easy	67%	24%	43%	15%	2%	1%	3%	15%
I feel a sense of accomplishment every time I visit the Y	83%	34%	49%	12%	1%	2%	3%	1%
The instructors are friendly and positive	78%	40%	38%	9%	2%	1%	3%	9%
Offers high quality products and services	80%	33%	47%	16%	1%	1%	2%	1%
The programs are helping me and/or my family achieve our goals	72%	27%	45%	16%	1%	1%	2%	10%

Membership Satisfaction Ratings: n=282

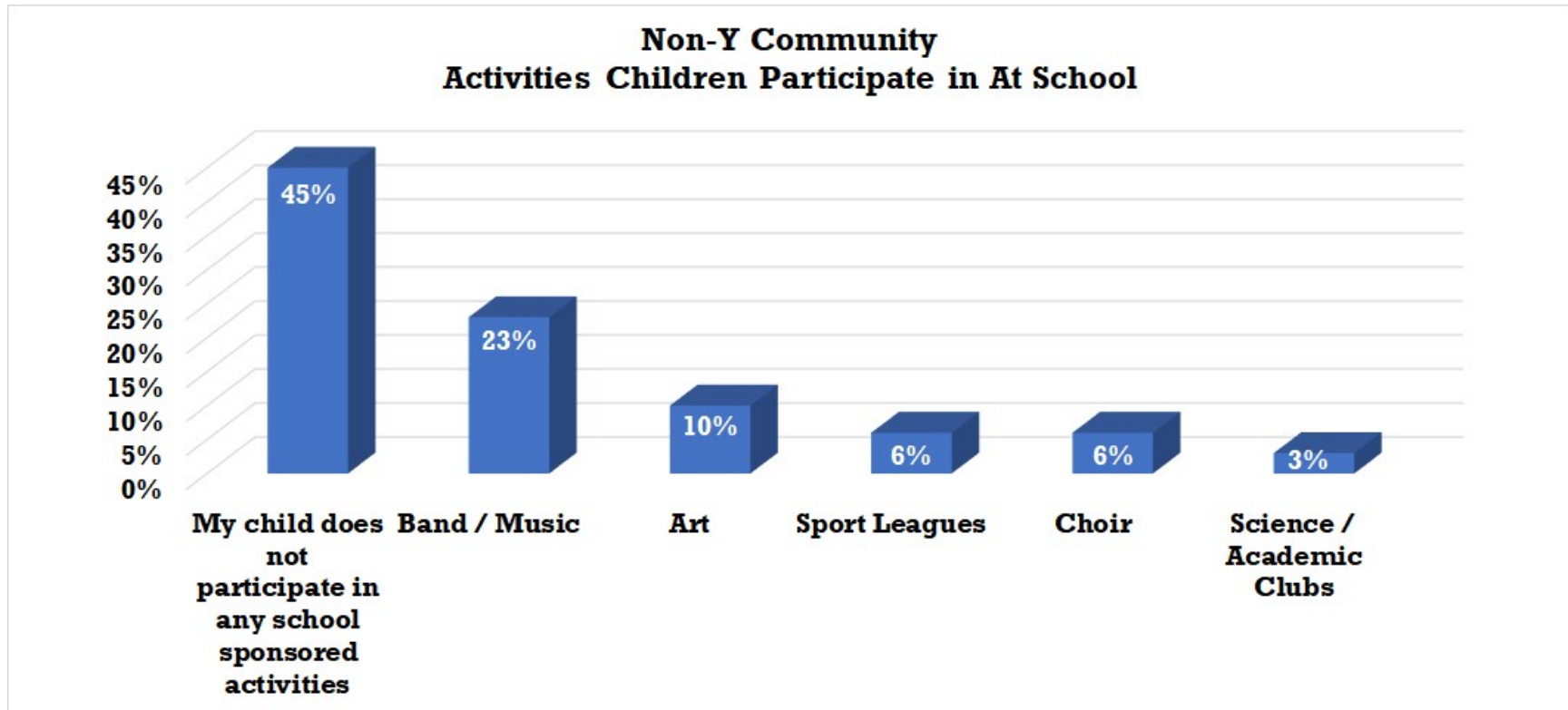
CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
The atmosphere is warm and welcoming	84%	37%	47%	12%	2%	3%	5%	0%
The equipment is up-to-date and well maintained	83%	34%	49%	8%	3%	2%	5%	4%
I feel welcomed	84%	43%	41%	11%	2%	2%	4%	0%
It is a fun place for me (and my family)	85%	43%	42%	11%	2%	2%	4%	0%
The floor staff are knowledgeable	72%	33%	39%	19%	1%	2%	3%	6%
The instructors motivate participants to succeed	69%	35%	34%	17%	2%	1%	3%	11%
Registering for programs is easy	67%	24%	43%	15%	2%	1%	3%	15%
I feel a sense of accomplishment every time I visit the Y	83%	34%	49%	12%	1%	2%	3%	1%

Membership Satisfaction Ratings:

n=282

CATEGORY	Top -2- Box	Strongly agree	Agree	Neither disagree nor agree	Disagree	Strongly disagree	Bottom -2- Box	N/A
The instructors are friendly and positive	78%	40%	38%	9%	2%	1%	3%	9%
Offers high quality products and services	80%	33%	47%	16%	1%	1%	2%	1%
The programs are helping me and/or my family achieve our goals	72%	27%	45%	16%	1%	1%	2%	10%
The program areas are clean and accessible	87%	36%	51%	5%	1%	1%	2%	5%
The instructors are competent and qualified	72%	33%	39%	15%	0%	1%	1%	12%
The programs offered at the Y are high quality	76%	34%	42%	14%	0%	1%	1%	8%

ACTIVITIES CHILDREN PARTICIPATE AT SCHOOL



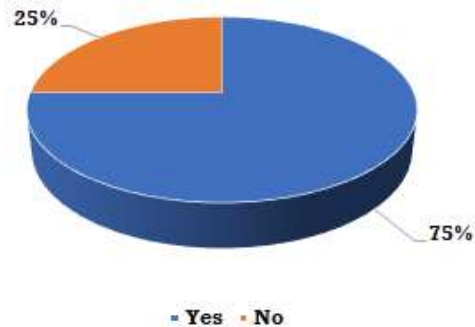
Offering Music and Art programs at the YMCA of Gulfport may assist in increasing awareness and consideration to the YMCA.



NON-PROFITS AND CHARITIES

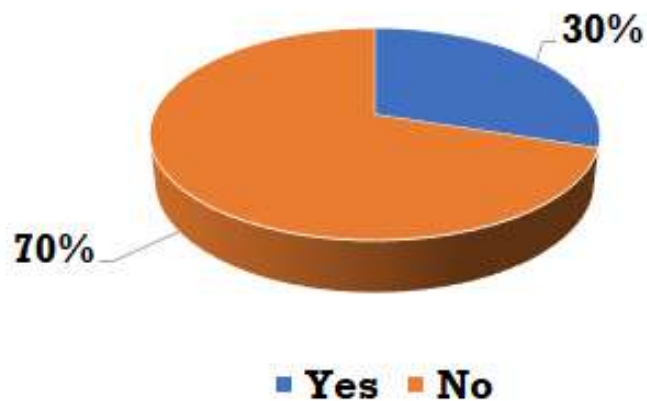
CONSIDERING THE Y TO BE A NOT FOR PROFIT

**YMCA MEMBERS
CONSIDER THE Y TO BE A NOT FOR PROFIT
(n=224)**



$\frac{1}{4}$ of current members do not consider the Y to be a not-for-profit

**YMCA MEMBERS
AWARE OF VOLUNTEER OPPORTUNITIES
(n=232)**



The vast majority of members were not made aware of Volunteer opportunities.

VOLUNTEERING AT THE YMCA

**90% OF MEMBERS HAVE NOT
VOLUNTEERED**

Responses	%
To give back to the community	65%
I believe in the work the Y does in my community	39%
A staff member asked me to	30%
I needed the service hours	4%
My friends and/or family volunteered	4%
My company sponsored an event	4%
An instructor asked me to	0%

Although, a low sample, directionally, this information provides insights as to how to increase relevancy, establish an emotional connection that may lead to donations.

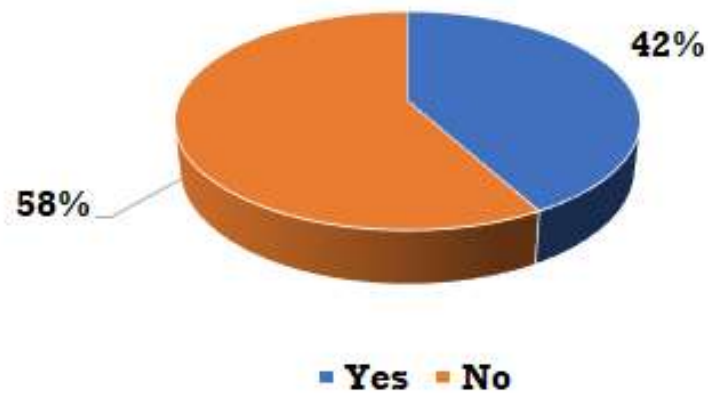
***Giving back to community
/ work they do in the
community***

“ASKED ME”

***Providing opportunities to
volunteer and trainings staff to
volunteer.***

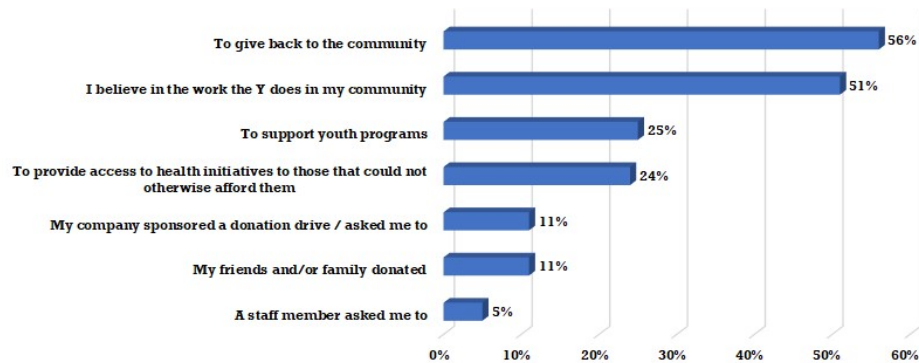
DONATING – YMCA MEMBERS

**Aware of Donating Opportunities
YMCA Members
(N=232)**



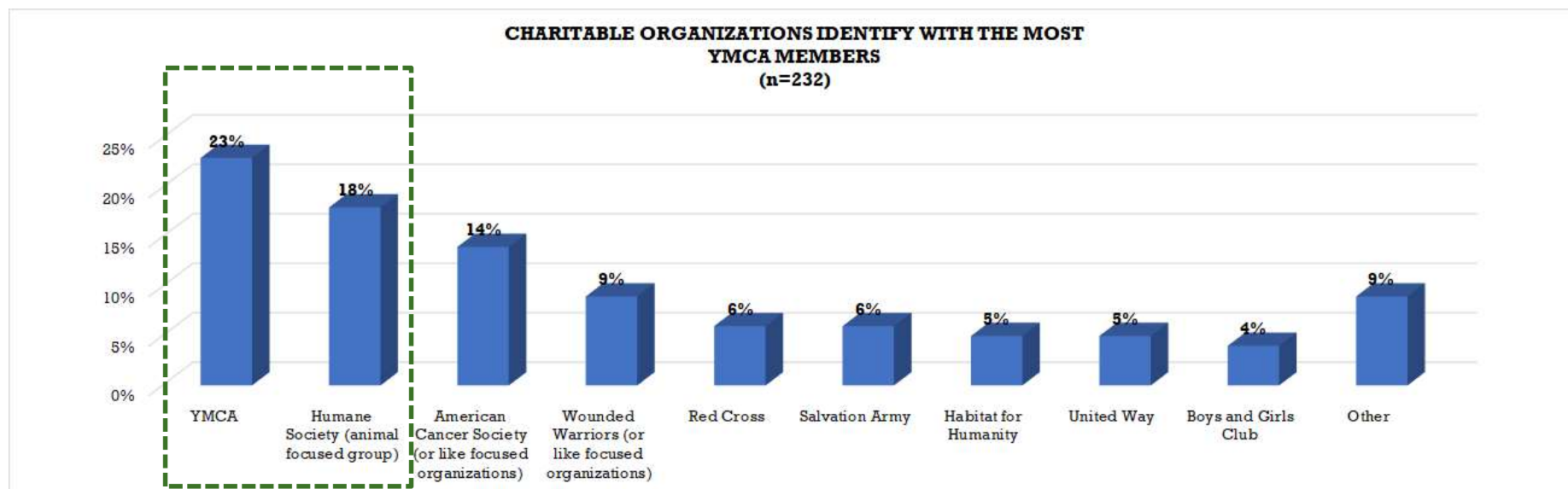
**Just over 1/5
(23% have
made a
donation)**

**PRIMARY MOTIVATORS FOR DONATING
(YMCA MEMBERS)
(n=55)**



**Just under $\frac{3}{4}$
(73%) would
consider
donating in
the Future**

CHARITABLE ORGANIZATION MOST IDENTIFY WITH



Among members, the YMCA along with the Humane Society, are the charities they identify most with among the ones they had to select from.

More analysis is needed to further understand why, but the insights will allow for an understanding as to how to make the Y more relevant to the Non-Y Community. This will become increasingly important if / when they have a presence in the Gulfport community.

NON-Y COMMUNITY – DONATING / VOLUNTEERING HABITS

org	Donate Only	Volunteer Only	Donate and Volunteer	Neither Donate / Volunteer
St. Jude Hospital	44%	5%	6%	44%
Cancer Related Charities	34%	4%	7%	56%
Animal Related Charities (Humane Society, ASPCA, etc.)SA	31%	4%	14%	51%
Military Veterans Related Charities (Wounded Warriors, Hope for the Warriors, Homes for our Troops)	31%	3%	10%	56%
Red Cross	30%	5%	10%	55%
Shriners Hospitals for Children	26%	4%	6%	64%
Police / Fire Department	24%	7%	4%	65%
Church / Religious Organizations	22%	6%	25%	47%
Habitat for Humanity	22%	5%	7%	66%
Boys and Girls Club	14%	3%	6%	77%
United Way	13%	4%	3%	79%
The Y (YMCA)	11%	4%	4%	81%

Compared to other charities in the community the Y is ranked last.

This may be more to do with a lack of understanding / relevancy (emotional connection) of how the Y is connected to them or the work done in the community.



APPENDIX

DEMOGRAPHIC ANALYSIS

Population Demographics

Ethnicity / Race:	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
White	66%	64%	56%	64%	58%	67%
Black	24%	24%	33%	25%	33%	23%
Hispanic	6%	6%	6%	6%	4%	5%
Asian	2%	3%	2%	3%	2%	2%
American Indian / Alaska Native	0%	0%	0%	0%	0%	0%
Other	2%	2%	3%	2%	2%	2%

White and Blacks are the top two race / ethnic groups in the area, however there is a moderate strong Hispanic presence as well

Language Spoken @ Home	I-10 / 605 Exit		Gulfport HS		Orange Grove	
	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius	5 Miles Radius	10 Mile Radius
Speaks English	93%	92%	93%	93%	94%	94%
Speaks Spanish	4%	4%	4%	4%	4%	4%
Speaks Other Indo-European Languages	2%	1%	1%	1%	1%	1%
Speaks Asian or Pacific Island Language	1%	3%	1%	2%	1%	1%
Speaks Other Language	0%	0%	0%	0%	0%	0%

Although English is still the dominant language, with the Hispanic presence 4% of the HH's do speak Spanish at home.



RESPONDENT CHARACTERISTICS

RESPONDENT CHARACTERISTICS

Age	Non-Y Community (n=148)	YMCA Member (n=227)
Under 18	0%	0%
18 - 24	11%	3%
25 - 34	21%	19%
35 - 44	15%	22%
45 - 54	11%	18%
55 - 64	20%	18%
65 - 74	20%	13%
75 - 84	1%	6%

Ethnicity / Race	Non-Y Community (n=148)	YMCA Member (n=227)
American Indian or Alaska Native	1%	0%
Asian	2%	1%
Black or African American (Non-Hispanic)	10%	4%
Hispanic/Latino	3%	3%
Native Hawaiian or Pacific Islander	1%	1%
White (Non-Hispanic)	80%	87%
Prefer not to identify	3%	4%

Employment Status	Non-Y Community (n=148)	YMCA Member (n=227)
Employed Full-time	37%	47%
Employed Part-time	10%	8%
Stay at home caregiver - Full-time Parent	6%	11%
Retired	29%	30%
Unemployed – Looking for work	8%	0%
Student	6%	1%
Other (Please specify)	5%	2%

Distance Travel to Work	Non-Y Community (n=148)	YMCA Member (n=227)
Less than 15 miles	72%	69%
15 – 29 miles	20%	20%
30 – 59 miles	6%	9%
60+ miles	3%	2%

Education	Non-Y Community (n=148)	YMCA Member (n=227)
High School	14%	5%
Some College	29%	10%
Technical Degree	2%	1%
2 yr. Degree / Associate's Degree	23%	12%
4 yr. Degree / Bachelor's Degree	23%	38%
Master's Degree	9%	25%
Doctorate Degree	1%	9%

Household Income	Non-Y Community (n=148)	YMCA Member (n=227)
Less than \$15,000	15%	3%
\$15,000 - \$24,999	12%	3%
\$25,000 – \$34,999	16%	1%
\$35,000 - \$49,999	13%	15%
\$50,000 - \$74,999	18%	21%
\$75,000 - \$99,999	16%	17%
\$100,000 - \$124,999	4%	17%
\$125,000 - \$149,999	1%	6%
\$150,000 - \$199,999	2%	6%
\$200,000 and Over	2%	11%