

NOTE: What follows are the results of a Market Feasibility Study that was jointly commissioned by the three agencies —Eden Youth & Family Center, La Familia Counseling Services, and Eden Area YMCA—who responded to the South Hayward Family Center Facility Operator and Administrator Request for Qualifications (RFQ). The three agencies independently commissioned this study with the support and encouragement of the SHFC Governance Group. **This study is not a community needs analysis**, but rather an examination of the market feasibility and likely demand for various services and programs proposed to be offered in the new facility. A primary purpose of the study was for the three RFQ respondent agencies to assess what forms of operating revenue they might be able to generate to help sustain the center’s operations. **This study is not intended to be a final word on what services would be offered in the new facility**, but provides an additional valuable piece of information to add to the big picture and help inform the Governance Group’s deliberations as the project develops and moves forward.

South Hayward Family Center Market feasibility study

SHFC Governance Group

April 3, 2017

Study Objective

- To provide objective research data to the three entities participating in the collaborative effort to provide new and improved health, wellness, and social services facilities and experiences in the South Hayward Area.
- The information generated and the analysis of the findings will allow each party and the entire group to make better-informed decisions regarding the future of serving community residents' needs.
- Of specific importance in this research is determining area residents' interest and willingness to use and support a new Multi-Service Youth and Family Center to be located at 680 West Tennyson Rd.

Study Approach

Phase One: A review of secondary demographic and psychographic information. This review included data from a broad variety of sources including the City of Hayward, Alameda County, the Hayward Area Recreation and Parks District, La Familia Counseling Services, Eden Youth and Family Center, and the YMCA of the East Bay.

Study Approach

Phase Two: Four focus groups recruited by La Familia Counseling Services, Eden Youth and Family Center and Eden Area YMCA.

- **Group One:** Key representatives of the City of Hayward, Alameda County, the Hayward Area Recreation and Parks District, the YMCA, La Familia, Eden Youth and Family Center and any other on-site service providers or partner organization, responsible for the planning and execution of this study and future collaboration in the South Hayward Youth and Family Center.
- **Group Two:** Formal and informal community leaders from the Hayward area who are knowledgeable and influential in the community, who are not otherwise a direct part of the planning process for this research nor directly responsible for expanding the health/social services assets within Hayward.
- **Group Three:** Frontline staff from the entities that currently provide health and social service programming throughout the study region.
- **Group Four:** Members of the community including youth and teens.

Study Approach

Phase Three: 400 telephone/online/cell phone interviews with a random sample of area residents who live within the likely/intended service of the new South Hayward Youth and Family Center.

The survey margin of error is +/-5% at the 95% confidence level. The survey plan was designed in such a manner that every household had an equal probability of being included in the study.

All interviewing was completed in March of 2017. Survey consultant utilized a multilingual and multi-cultural interviewing team and as such, within reason, respondents were able to participate in their language of first choice.

Survey consultant overlaid an email survey in attempt to capture an adequate share of residents who rely only on their mobile device and no longer have a landline telephone.

Rating South Hayward as a Place to Live

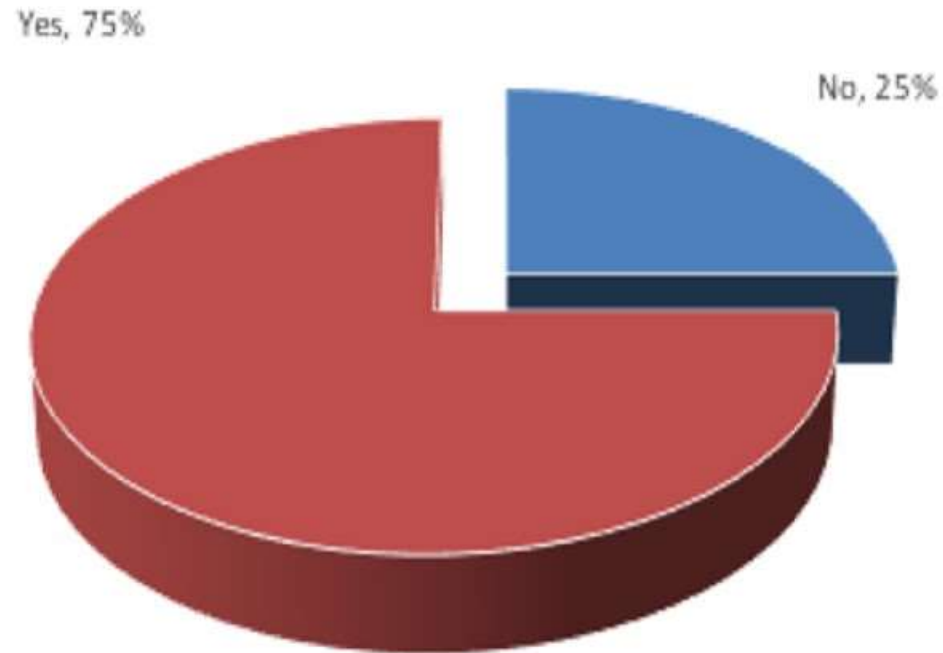
- Overall, 73% of local area residents believe South Hayward is a good (46%) or excellent (27%) place to live.

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Excellent	27	22	24	30	33
Good	46	56	41	50	40
Fair	20	11	32	13	13
Poor	6	11	3	7	7
Very poor	1	--	--	--	1

Question: Overall, would you say the South Hayward area is a _____ place to live?

Is This Location in Your Neighborhood and Community?

Three quarters (75%) of area residents consider the Tennyson Park / 680 W. Tennyson Road location to be “in their neighborhood and community”.

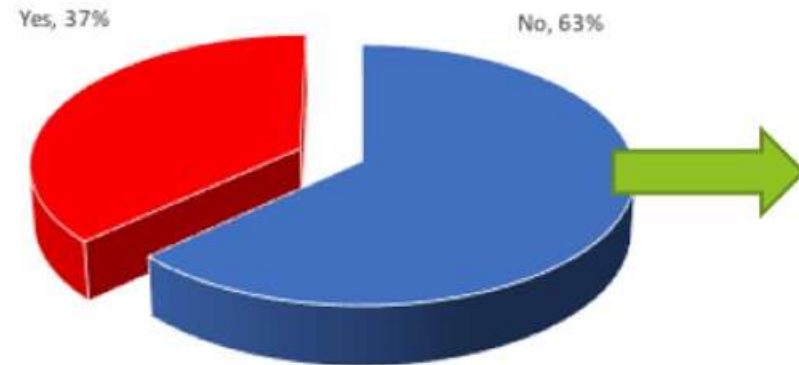


Question: Do you consider this location to be in your neighborhood and community?

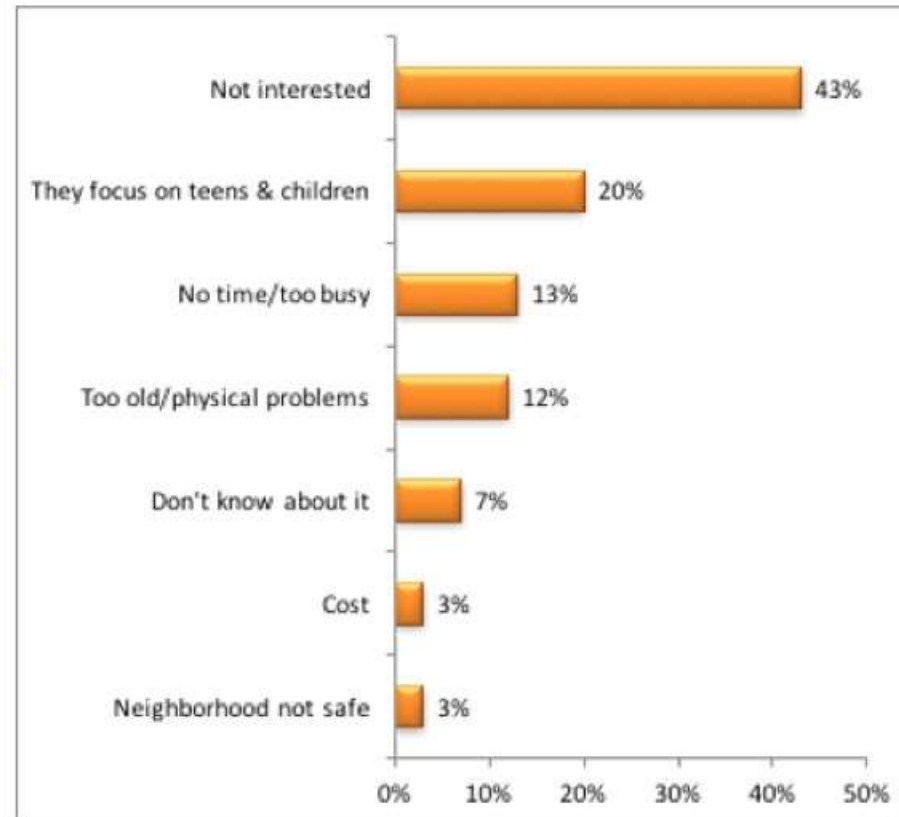
Participation in Programs

Eden Youth and Family Center

- More than a third (37%) of area residents included in this survey claim to have participated in programs at the Eden Youth and Family Center during the past 12 months.



Question: In the past 12 months have you or has anyone else in your home participated in any programs at the Eden Youth and Family Center?

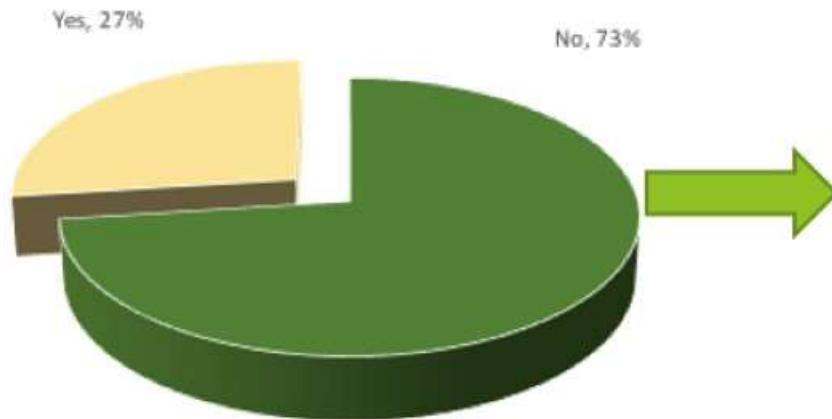


Why Residents Have Not Participated in Programs at Eden Youth and Family Center (In their own words)

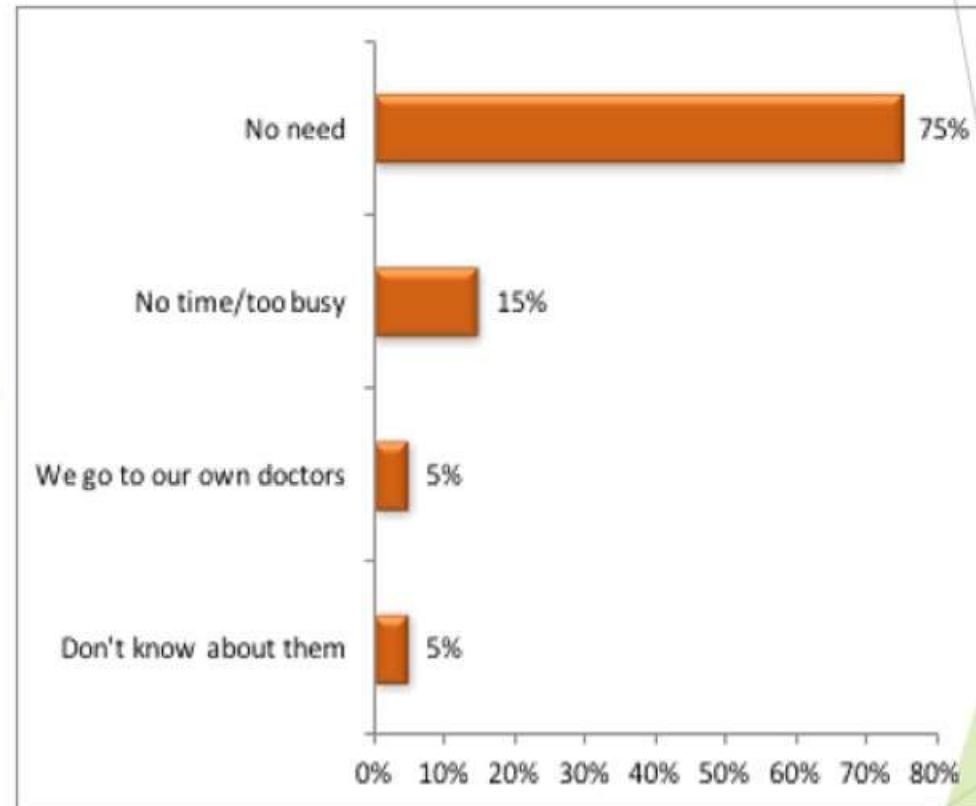
Participation in Programs

La Familia Counseling Service

- Slightly more than one quarter (27%) of area residents included in this survey claim to have participated in programs at the La Familia Counseling Center during the past 12 months.



Question: In the past 12 months have you or has anyone else in your home participated in any programs at the La Familia Counseling Center?

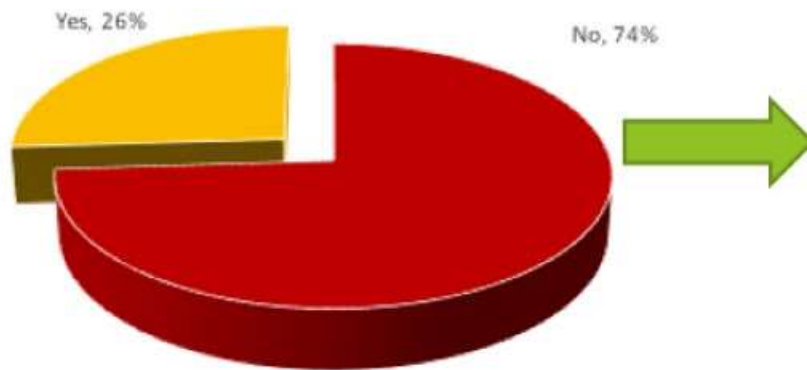


Why Residents Have Not Participated in Programs at La Familia Counseling Center (In their own words)

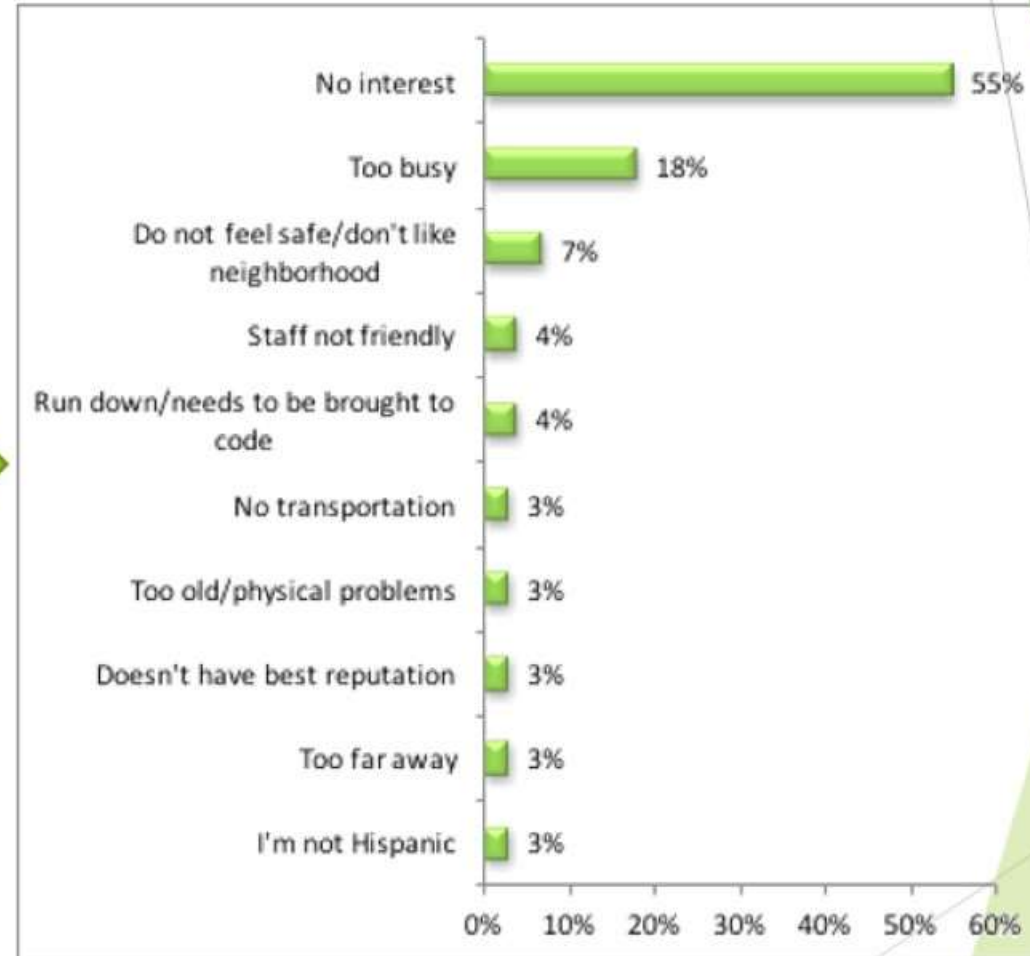
Participation in Programs

Matt Jimenez Community Center

- Approximately the same percentage of local residents (26%) claim to have participated in programs at the Matt Jimenez Community Center during the past 12 months.



Question: In the past 12 months have you or has anyone else in your home participated in any programs at the Matt Jimenez Community Center?

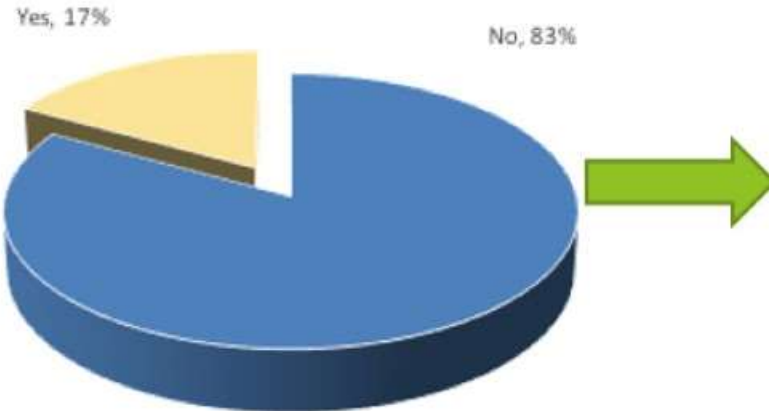


Why Residents Have Not Participated in Programs at Matt Jimenez Community Center (In their own words)

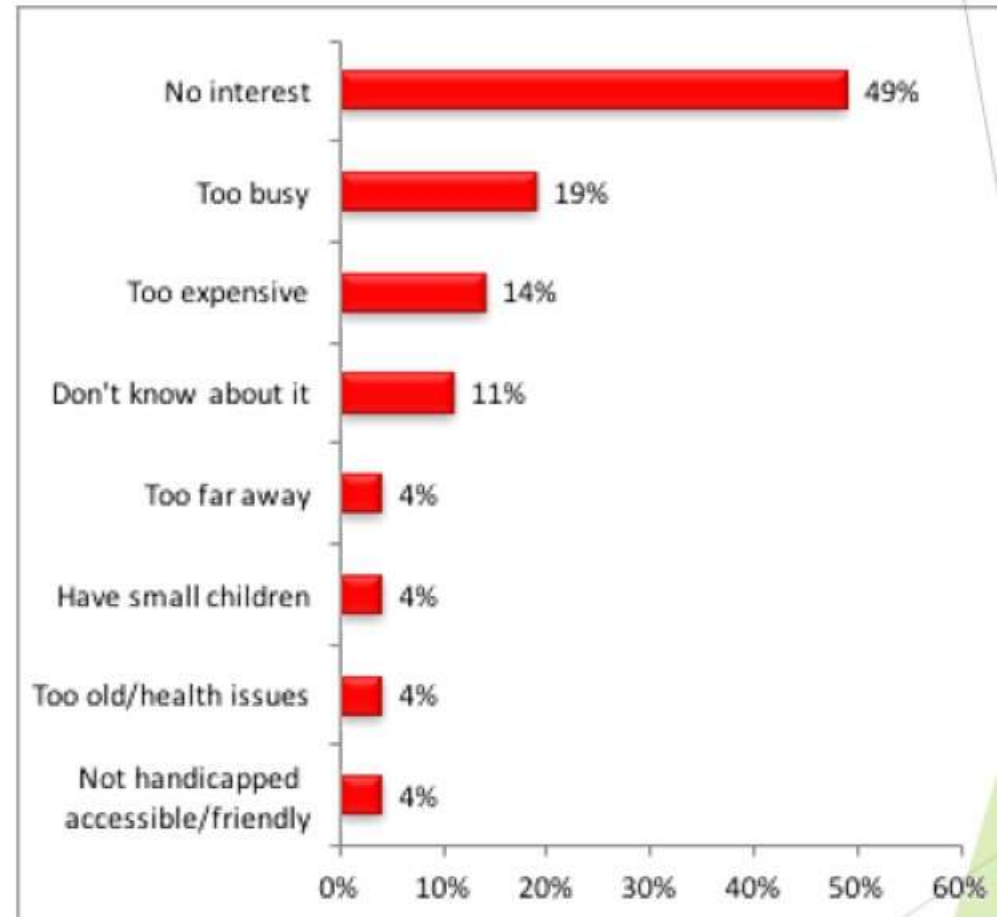
Participation in Programs

YMCA

- Seventeen percent (17%) of area residents claim to have participated in some type of YMCA program during the past 12 months.



Question: In the past 12 months have you or has anyone else in your home participated in any YMCA programs?



Why Residents Have Not Participated in Programs at YMCA (In their own words)

Reaction to a new multi-service youth & family center

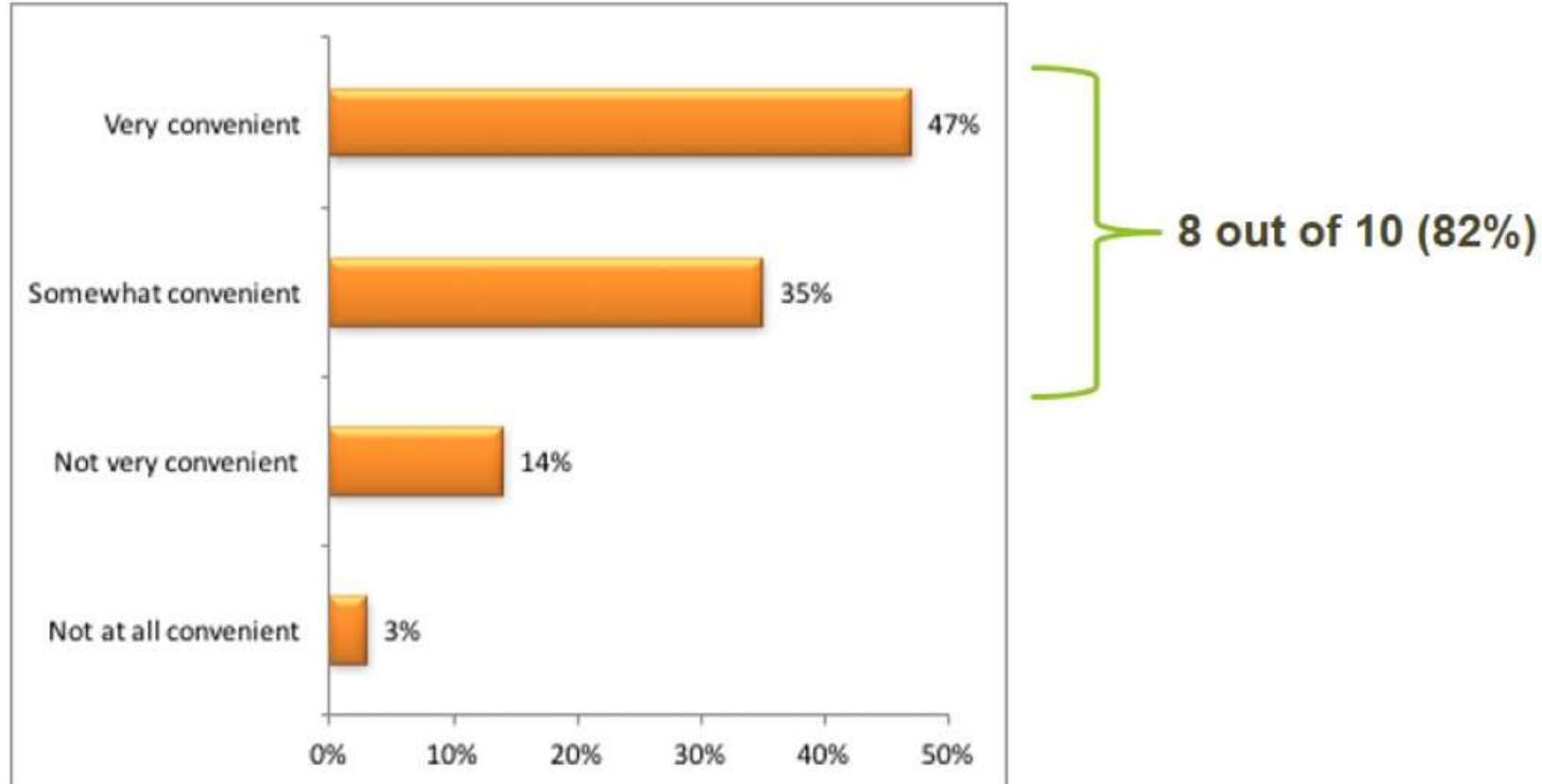
- Nearly nine out of ten (88%) of those questioned claim to have either have a very or somewhat positive reaction to having the new Multi-Service Youth and Family Center with many of the health and wellness services available at the current center that assist people in need to improve the quality in the community.
- Services include health care, dental, art and education services, mental health services, job placement for adults and teens, and legal services such as those provided by Eden Youth and Family Center (the current onsite service providers at EYFC) and the menu of services of La Familia.

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Very positive	70	89	71	77	33
Somewhat positive	18	11	17	17	33
Neither	8	--	11	7	13
Somewhat negative	3	--	--	--	20

Question: This new state-of-the-art center will have ample free parking and will include many services to assist people in need including health care, dental, art and educational services, mental health services, job placement, legal services and more for families, adults, youth, and seniors. When this new center opens these services will be available at no cost. Overall, is your reaction to this new center at this location?

Convenience of proposed location

Respondents were provided with a description of where Tennyson Park is located and told that the new state-of-the-art Multi-Service Youth and Family Center will be built at the park. They were then asked to indicate how convenient they believe this location is for use by members of their household.



Question: This new state-of-the-art center will have ample free parking and will include many services to assist people in need including health care, dental, art and educational services, mental health services, job placement, legal services and more for families, adults, youth, and seniors. When this new center opens these services will be available at no cost. Overall, is your reaction to this new center at this location?

Interest in specific services

% Very Interested

20% or more are
"very interested"

	Total Sample (%)	Youth in Home (%)	No Children (%)
Outdoor sports facilities	44	82	20
Safe, drug-free facilities	37	56	25
Helping youth stay in school	37	56	25
Dental clinic for children	36	62	20
Career pathways for youth/young adults	35	62	18
Medical clinic for children	34	62	17
Programs for those facing illnesses	33	38	30
Multiple exercise studios	32	38	28
State-of-the-art fitness center	32	36	30
Services for families w/developmental difficulties	31	26	35
Mental health services for families	31	46	22
Programs to help at-risk youth	31	49	20
Teen Center with 21 st century technology	29	64	7
Healthy lifestyle choices for youth	29	56	12
Area for relaxing, meeting friends w/healthy snacks	26	44	15
Community vegetable garden	26	28	25
Outdoor splash pad with water park features	25	62	2
Employment services after jail or prison	23	23	23
Full court basketball gym	22	46	7
Cultural community events	21	23	20
Youth leadership development	20	38	8
No cost drop-in babysitting	17	36	5
Fully licensed childcare	17	33	7
Teaching kitchen for healthy cooking and nutrition	14	23	8
Tattoo removal services	8	8	8
Services for undocumented individuals/families	6	13	2
Services for unaccompanied immigrant youth	6	13	2

Base: Total area resident sample (400).

Question: And, how interested are you or members of your household in each of these programs?

See note on Slide #1

Interest in additional programs and services

20% or more are
“very interested”

<i>% Very Interested</i>	Total Sample (%)	Youth in Home (%)	No Children (%)
Youth employment services	37	62	22
Computer technology for adults	35	38	33
Help with finding jobs for adults	35	28	40
Computers for adults	32	38	28
Youth homework help/mentoring	32	56	17
Pilates, Zumba, and Yoga	27	28	27
Fitness classes for youth and adults	27	51	12
Health/wellness education programs	26	33	22
Classes to help with alcohol or drug addiction	25	21	28
Computer technology for youth/teens	25	46	12
Physical rehabilitation	23	33	17
Nutrition, diet, and weight loss	22	28	18
Fun activities to get youth off the couch	22	44	8
After-school youth programs	20	46	3
Senior social and exercise programs	18	10	23
Traditional art classes for youth and teens	19	33	10
Age-specific youth fitness	18	38	5
Parent/child programs	18	44	2
Summer day camp	16	36	3
Theatre/performing arts classes	15	31	5
Support groups for parents lead by parents	14	23	8
Sports leagues for youth	14	33	2
English as a second language	12	21	7
Sports leagues for adults	11	21	5
State-of-the-art sound production/recording studio	8	18	2
Core/functional training/boot camp	7	13	3
Martial arts	6	8	5

Base: Total area resident sample (400).
Question: Now I am going to read you a list of programs that may be offered at the new Youth and Teen Center in South Hayward. On a scale from 1 to 5, where 5 = very interested and 1 = not at all interested, how interested are you or are members of your household in each of these programs?

Of 27 programs/services tested that may be included in the new Center, most of which are now offered by La Familia, the YMCA, and/or Eden Youth and Family Center, those that draw the greatest level of interest from area residents are:

Very High (>30%) Interest Items

Program/Service
Outdoor Sports Facility
Youth Employment Services
Safe, Drug-Free Facilities
Helping Youth Stay in School
Dental Clinic for Children
Help with Finding Jobs for Adults
Career Pathways for Youth/Young Adults
Computers for Adults
Medical Clinic for Children
Programs for those Facing Illnesses
Youth Homework Help/Mentoring
Multiple Exercise Studios
State of the Art Fitness Center
Services for Families with Devel Disabilities
Mental Health Services for Families
Programs to Help At-Risk Youth

High (20-30%) Interest Items

Program/Service
Teen Center with 21 st Century Technology
Healthy Lifestyle Choices for Youth
Pilates, Zumba, and Yoga
Fitness Classes for Youth and Adults
Health/Wellness Education Programs
Area for Relaxing, Meeting Friends w/Healthy Snacks
Community Vegetable Garden
Classes to Help With Alcohol or Drug Addiction
Computer Technology for Youth/Teens
Outdoor Splash Pad w/Water Park Features
Physical Rehabilitation
Employment Services after Jail or Prison
Nutrition, Diet and Weight Loss
Fun Activities to Get Youth off the Couch
Full Court Basketball Gym
Cultural Community Events
After School Youth Programs
Youth Leadership Development

Likelihood of using new center

- Nearly 7 out of ten (68%) local residents claim that they or someone else in their household is either very likely or somewhat likely to use the new Center as described with the programs and services provided Eden Youth and Family Center and the menu of services of La Familia.

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Very likely	40	56	58	23	13
Somewhat likely	28	44	17	40	13
Not very likely	27	--	17	37	67
Not at all likely	4	--	8	--	7

Question: How likely is it that you or someone else in your home will use this new center?

Reaction to inclusion of YMCA in new center

Respondents were read the following statements:

*Suppose that when the new center opens it includes, **at no cost**, all of the social service programs mentioned previously. It may also contain a YMCA offering family wellness, fitness, recreation and arts facilities. These YMCA offerings would require a monthly paid membership. This extra cost membership would give you access to programs and activities such as dance, music and performing arts classes, cardio and weight training and free weights, exercise studios for yoga, Zumba, and other group exercise classes, a gymnasium for basketball, volleyball, etc., locker rooms, and free child care while families participate in activities. This membership will offer a wide variety of classes and programs for families, seniors, adults, and youth.*

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Very positive	35	50	47	27	7
Somewhat positive	22	11	22	30	20
Neither positive nor negative	39	39	28	43	60
Somewhat negative	3	--	3	--	13
Very negative	--	--	--	--	--

Question: Overall, is your reaction to including the YMCA family fitness, recreational activities and arts programming at this new Youth and Family Center in South Hayward

Likelihood of using fitness, recreation, and arts programming

One out of five (20%) households represented in this study claim that it is very likely that they would use fitness, recreation and arts activities if included in the new Multi-Services Center.

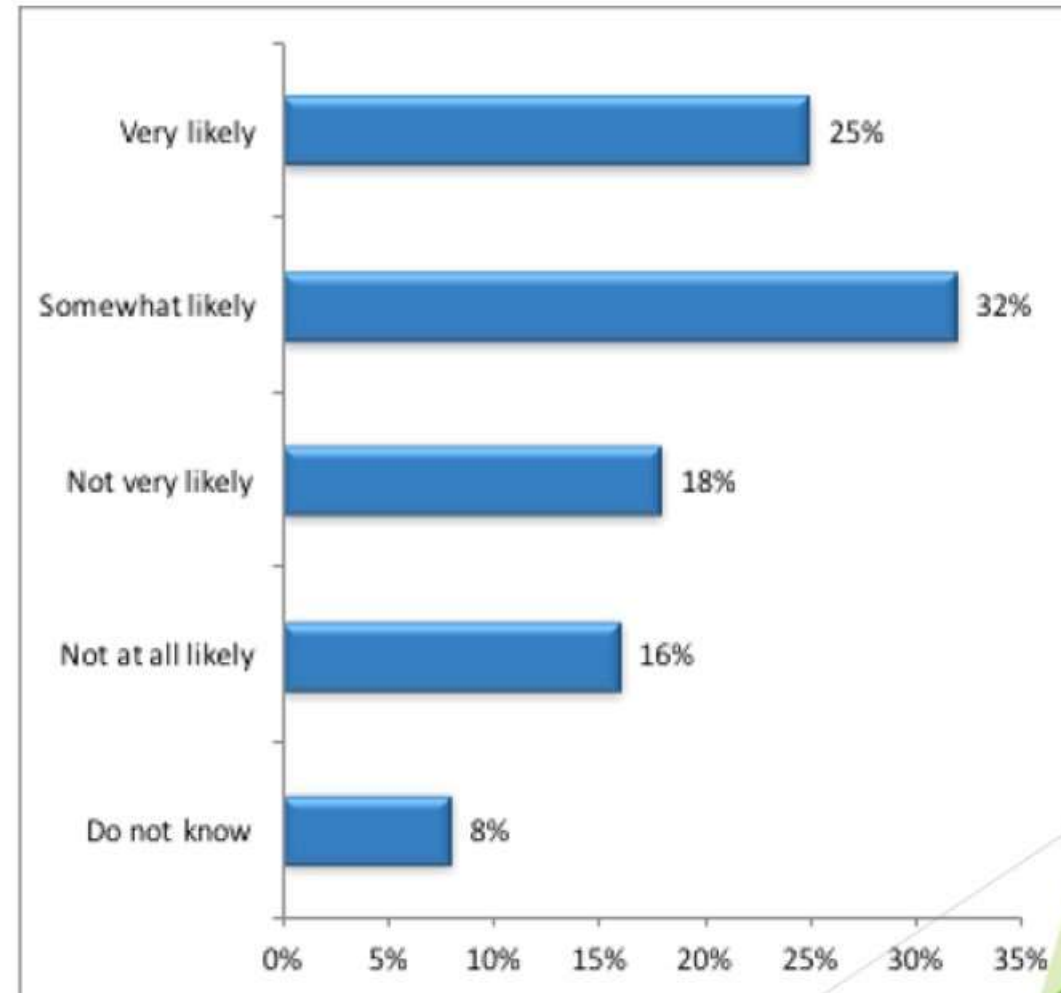
	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Very likely	20	11	39	13	--
Somewhat likely	24	28	25	27	13
Not very likely	51	56	31	60	73
Not at all likely	5	6	6	--	13

Question: How likely is it that you or someone in your home will use these fitness, recreation and arts activities at the new center?

Willingness to pay for a specialized class at Youth and Family Center

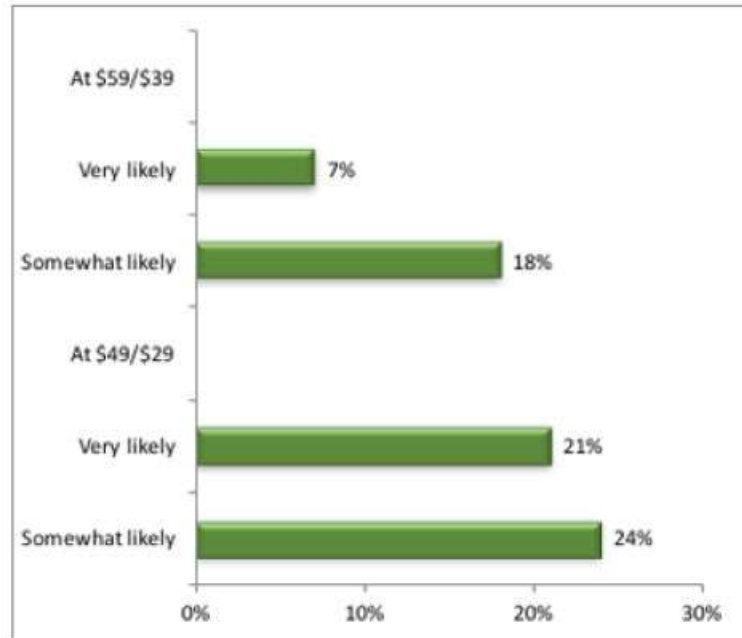
- If an 8-week class or program was offered at the new Multi-Service Center, that someone really wanted to attend was made available, 25% of those questioned claim they are very likely to pay \$25 for this class/program. Thus, just as found regarding YMCA membership, if a desirable, quality class or program is offered at the Center, a meaningful percentage (25%) of the South Hayward population claim to be willing to pay a reasonable amount to be able to participate.
- An additional 32% are somewhat likely to pay \$25 for a class or program they really want to attend.

Question: *If you found an eight week class or program that you were really interested in at this new center and it cost \$25 to help cover the cost of materials, how likely would you be to pay this \$25 and take the class?*



Area residents were told that as part of the YMCA mission YMCAs offer reduced cost membership to families and individuals who cannot afford a full price membership. The survey data indicate that a new center in Tennyson Park could expect considerable interest in membership if scholarship opportunities are promoted among lower income residents.

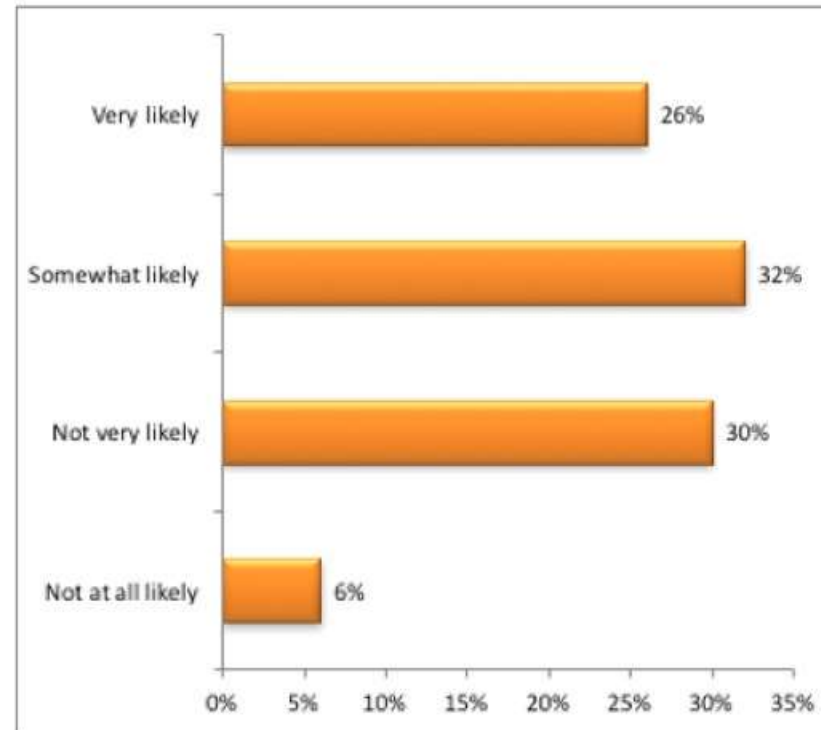
Likelihood of joining YMCA at full cost



Question: How likely is it that you will join the new fitness, recreation, and arts component of the new Center if a membership for a household costs \$59 per month and a single membership costs \$39 a month? Are you [READ SCALE] to join?

Question: How likely is it that you will join the new fitness, recreation, and arts component of this new Center, if a membership for a household costs \$49 per month and a single membership costs \$29 a month? Are you [READ SCALE] to join?

Likelihood of joining YMCA at 50% reduced cost



Question: If you were offered 50% off on the cost of the monthly membership to the fitness, recreation, and arts programming at the new Center, how likely would you be to join?

Likelihood of using retail services

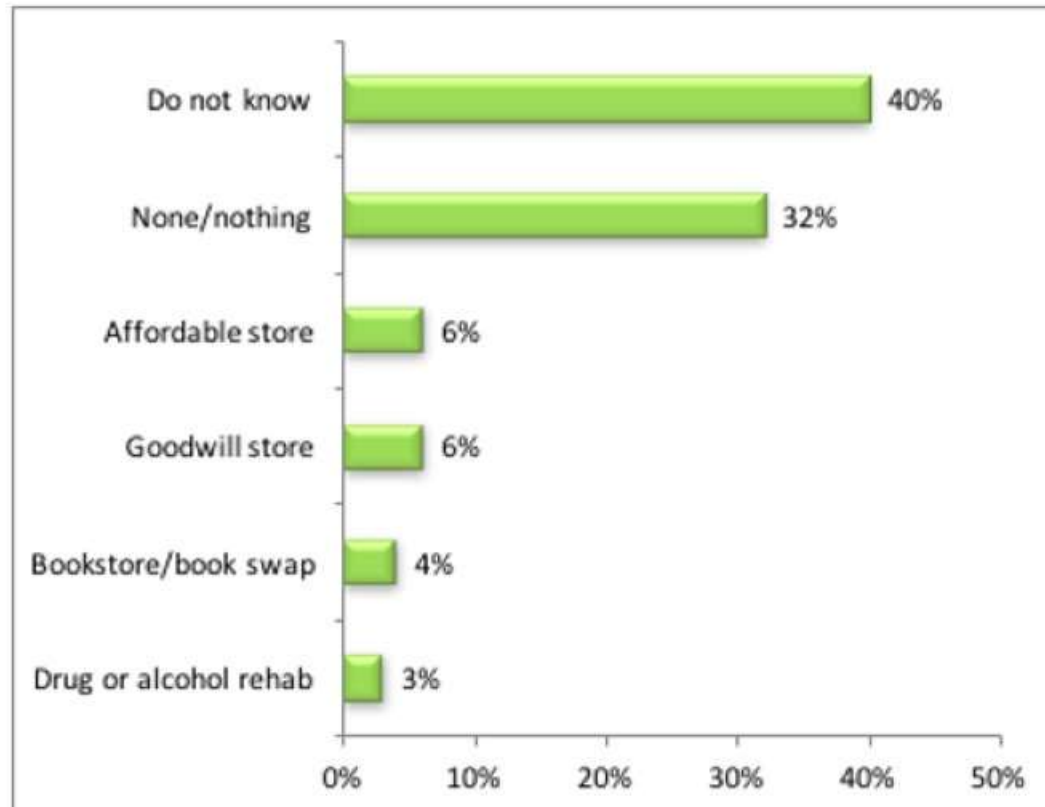
- Of four potential retail offerings that could be provided in the South Hayward area or in/near the new Multi-Service Center, the two likely to be most popular are a grocery store and some type of place to socialize.

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Grocery store	24	39	28	17	13
Place to socialize	20	39	25	17	13
Café/coffee shop	12	17	11	10	13
Bank or credit union	7	6	6	10	7

Question: On a scale from 1 to 5, where 5 = very likely and 1 = not at all likely, how likely are you to use each of the following retail services if they were to open at or near this new Youth and Family Center?

Other retail services (in their own words)

When respondents were asked to volunteer other possible retail offerings for the area, the following suggestions were made.



Question: Other than those mentioned, what other retail services would you like to see in this area?

NOTE: Only responses given by 3% or more of the sample are included in this chart.