



campos

Aquatic Center Research Report

Prepared for
Peters Township

November
2019

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The report appendix is contained in a separate PDF document, "Peters Township Aquatic Center Research Appendix".

Background and Methodology

Background

Peters Township seeks to determine the feasibility of operating an aquatic center to serve the community and surrounding areas. The township believes that building an aquatic center (outdoor only) will require an investment of approximately \$11-12 million, and the township would like to ensure that it will have appropriate customer volume to support this investment.

Peters Township partnered with Campos to conduct a quantitative research study among residents of Peters and surrounding townships, including Upper Saint Clair, Bethel Park, North Strabane, Cecil, Union, and Nottingham. Campos conducted a research initiative in March 2018, sponsored by the YMCA of Greater Pittsburgh, which provided market-size data for Peters and the six adjoining townships. Campos leveraged population data from that report for the revenue projections contained herein.

For more than thirty years, Campos has provided clients with strategic insights that power informed decision-making. We are honored to assist Peters Township in determining the viability of this potential new community resource.

Methodology

The agreed-upon sample size for this study was 300, with most of the completed surveys to be collected from residents of Peters Township, along with no fewer than 50 from residents of the surrounding communities. The survey responses were collected between September 27 and October 22, 2019.

To administer the survey among Peters residents, the township mailed physical letters to a random sample of residents. Each letter contained a unique, single-use code providing access to the online survey. The community response exceeded the planned number of completions, and 364 surveys from Peters residents are included in this analysis. The surveys of residents in the surrounding communities were administered using Campos' community database. A total of 58 completed surveys were collected from residents of other communities.

This report includes analysis and findings for both Peters Township and for the surrounding townships, separately. The results among Peters residents, whose interest in the center would be expected to be highest, are more reliably measured. The results for the surrounding townships, given the smaller sample size, should be interpreted as more directional in nature. At a 95% confidence level, the Peters results have an error range of +/-5.06 percentage points, while the error range for the results among surrounding townships is +/-12.86 percentage points. Results among Peters residents at the total level have been weighted by age and income to reflect the demographics of the township. The weighting decreased the disproportionate effects of the 60+ age group and \$200k+ income group. Subgroup findings, demonstrating differences by age group or household type, do not reflect those weights, but provide meaningful insights for the township's consideration.

Purchase Intent & Revenue Projections

Given that consumers' self-reported intentions do not reliably predict their actual purchases, Campos uses a proven mathematical technique to convert respondents' stated likelihood to purchase into adjusted purchase probabilities. For this survey, we used a longstanding five-point scale of intention ratings to capture respondents' stated likelihood to purchase various pool membership types, each at a proposed price point. We then used the below factors to convert stated intent into probability scores among Peters Township respondents. This scale of stated intent and the corresponding conversion factors have been developed and tested through large-scale diary studies wherein consumers' stated intentions were tracked over time against actual purchase behavior.

Stated Intent	Purchase Probability Conversion Factor
Definitely	0.75
Very likely	0.25
Probably	0.10
Probably not	0.05
Definitely not	0.02

To illustrate this in practice: When 18% of Peters Township residents indicated they were "definitely" likely to purchase an individual membership to the aquatic center for \$105, Campos assumed only 13.5% would actually do so in its revenue forecast ($18\% * 75\% = 13.5\%$). The purchase probability calculations for lower levels of likelihood are distinctly more conservative, as shown above. The converted percentages for those who indicated "definitely," "very likely," "probably," etc. were then summed to (in this example) a 21% probability to purchase for the total population: a value of \$470,000 at the stated price. To account for the stated error range based on sample size, then, the projected revenue among Peters Township residents is best stated as falling somewhere between \$446,000 and \$494,000.

The final overall revenue projections were calculated using Peters residents' purchase probabilities and an estimated draw from the other townships, based on the survey results as well as secondary sources related to other indoor pools' apparent annual revenues or operating budgets.

Based on publicly available information regarding Upper St. Clair Recreation Center, Campos adopted the assumption that one-third of Peters Township's pool memberships would come from outside the township. The anticipated number of non-resident memberships was multiplied by a per-patron revenue amount for non-residents (based on the Peters per-patron revenue, but factoring in the higher cost of passes for non-residents), and the resulting revenue value was added to the Peters-resident contribution. In the case of individual memberships to the aquatic center, this increased the projected value to fall between \$651,000 and \$698,000.

Respondents were informed at the outset that both individual and family memberships would be available, and many respondents expressed interest in both. Respondents from single-person households were asked about their level of interest in individual memberships only, while those from multi-person households were asked about their level of interest in both individual and family memberships. All respondents also were asked their interest (yes/no) in a day pass for the aquatic center.

Because some respondents indicated an intent to purchase for both individual and family memberships, it is important to note that the individual and family membership-type revenue projections should not be seen as additive. To estimate the balance of individual and family membership contributions, respondents from multi-person households who expressed top-box ("definitely") interest in an individual membership were assumed to prefer that to a family membership. Thus, their purchase intent was combined with that of the single-person households. The rest of respondents from multi-person households were assumed to prefer a family membership, and their intent to purchase was only counted toward family memberships (even if they also indicated interest in an individual membership).

Executive Summary

Residents of Peters Township responded positively when they were asked about their reaction to the idea of an outdoor aquatic center as part of the development of Rolling Hills Park, with 78% of respondents indicating “top-two-box” interest (“very” or “somewhat” interested).

Nearly as many (69% top-two-box) believe that the presence of an outdoor community aquatic center is valuable in helping Peters to be perceived as a desirable place to live. This perceptual value is especially strong among residents with children in the household, residents younger than 40 years old, and residents with annual household incomes greater than \$150,000.

The survey presented respondents with a variety of purchasing/membership models for both the proposed outdoor-only aquatic center and a center that would also include an indoor pool. Respondents were asked their likelihood to purchase on a five-point scale. Top-two-box purchase intent was highest among Peters residents for a family membership at an outdoor aquatic center (38%).

The outdoor-only aquatic center garnered the most interest, but the indoor pool’s higher-priced memberships (which would be annual rather than for the three months of summer only) produced a significantly larger projected revenue outlook for the aquatic center. Fewer Peters residents are interested in the indoor pool add-on, however, so it may be important to also offer a seasonal, outdoor-only option.

The table below presents revenue projections using a set of standard factors for converting stated purchase intent into probability percentages (for instance, 75% of those who selected “definitely” will actually purchase). The table also includes projections based on a more conservative set of factors (which reduced the value of those who selected “definitely” will actually purchase from 75% to 50%). See Methodology section for additional details on the conversion factors.

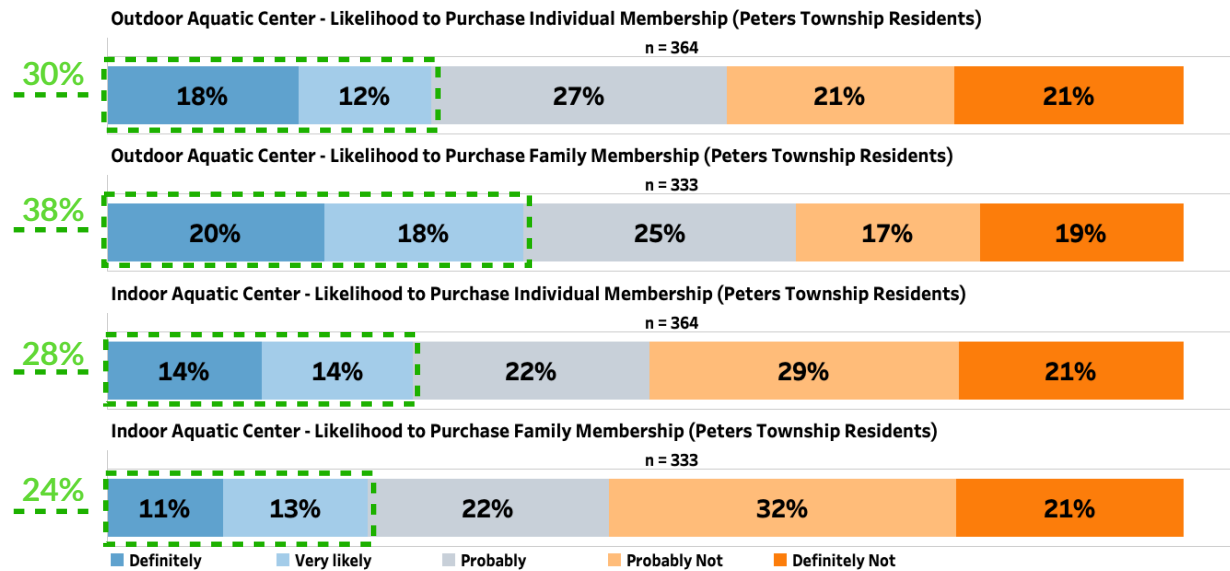
Respondents were informed that both individual and family memberships would be available, and many expressed their interest in both, so the individual and family revenue projections should not be considered additive.

Standalone Membership Option	Projected Annual Revenue (Standard Probability Conversion)	Projected Annual Revenue (Conservative Probability Conversion)
Aquatic Center - Individual	\$651K to \$698K	\$494K to \$531K
Aquatic Center - Family	\$1.293M to \$1.390M	\$1.203M to \$1.294M
Day Pass (Yes/No)	\$188K to \$202K	\$126K to \$135K
Indoor - Individual	\$3.172M to \$3.411M	\$2.558M to \$2.751M
Indoor - Family	\$3.568M to \$3.863M	\$3.355M to \$3.608M

Using the standard conversion factors, the combined projected revenue (individual and family) for an outdoor-only aquatic center is estimated to fall between \$1.7M and \$1.8M. It can be expected that some level of revenue from day passes, particularly from non-Peters residents, would add incremental revenue to the combined individual-and-family membership-based projections for an outdoor-only aquatic center. The combined projected revenue for the two membership types for a center with an indoor pool is estimated at \$3.8M to \$4.1M.

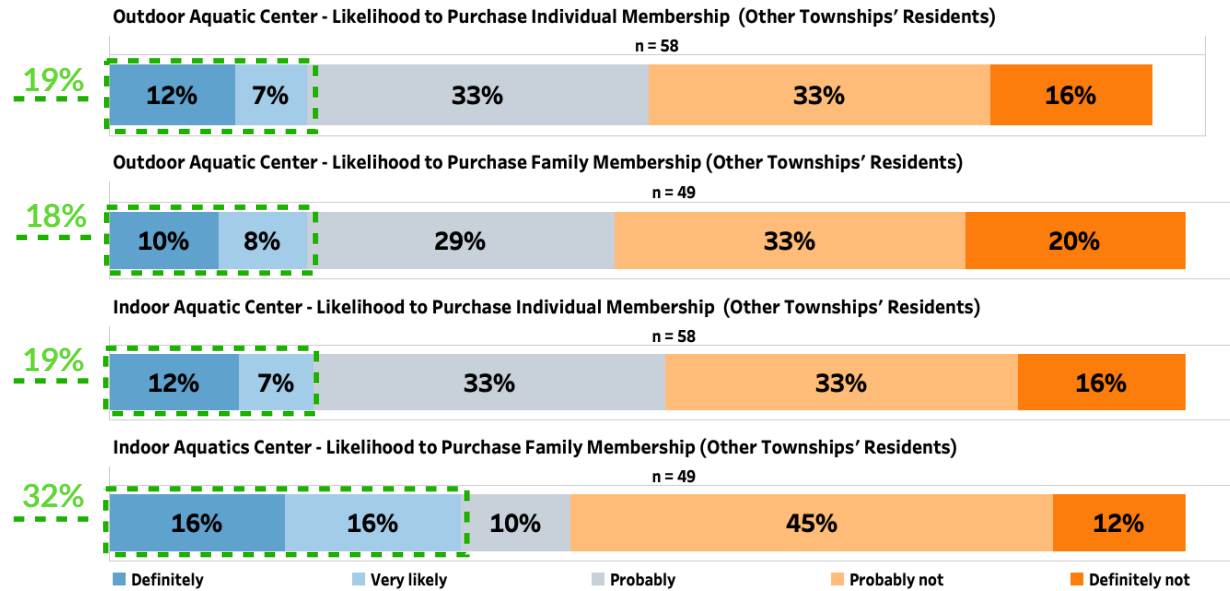
Revenue projections aside, Peters Township residents overall are more interested in purchasing memberships to an outdoor-only aquatic center than a center with an indoor pool. For an outdoor-only center, Peters Township residents are more interested in purchasing a family membership than an individual membership, with top-two-box responses at 38% and 30% respectively. For an aquatic center with an indoor pool, the opposite is true: Peters residents are more interested in purchasing an individual membership than a family membership, with top-two-box responses of 28% and 24% respectively.

Peters Township Residents' Intent to Purchase By Fee Type:



Among residents of other townships, top-two-box interest in purchasing individual memberships and family memberships are about the same for an outdoor-only center, at 19% and 18% respectively. A similar percentage of other township's residents express top-two-box interest in an individual membership for a center with an indoor pool, at 19%. By far the greatest interest among other townships' residents is in purchasing family memberships for a center with an indoor pool, at 32%.

Other Townships' Residents' Intent to Purchase By Fee Type:



Out of the features proposed for the outdoor aquatic center, “a deep-water pool with water slides and diving boards” and “a child-friendly, zero-depth-entry pool, or 'beach pool,' where the individual can walk in from the deck” were the top two features of interest.

When asked about potential fee-based programs at an outdoor aquatic center, “parties and group events” garnered the most interest. The ranking of the proposed features and the fee-based programs can help Peters Township establish which features and programs are essential to the pool and how Peters Township leadership can market the programs to specific households, based on the ages of the individuals in the household.

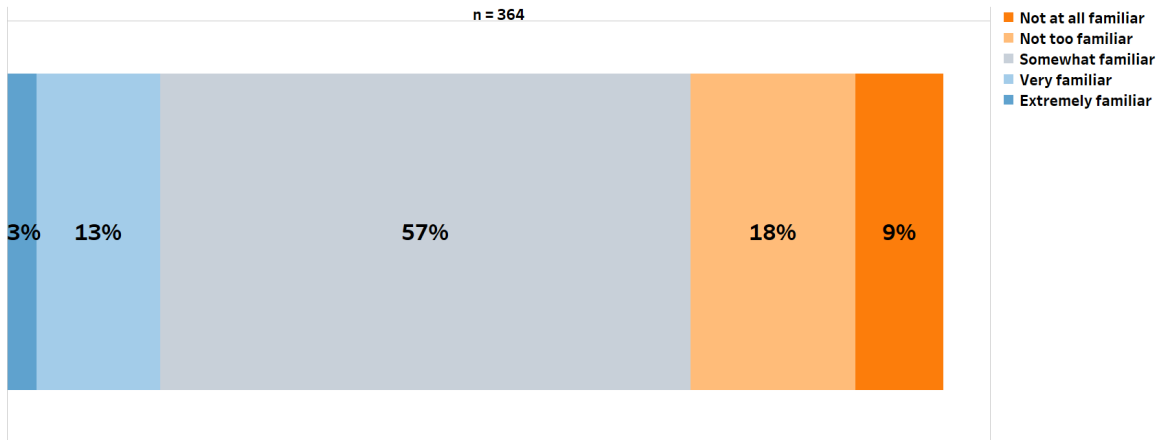
Report Details

Reactions to the Master Plan and the Outdoor Aquatic Center

Nearly three-quarters (73%) of Peters Township residents are at least somewhat familiar with the Master Plan for Rolling Hills Park, located at the former Rolling Hills Country Club site. Only 9% of Peters residents were “not at all familiar” with the Master Plan.

Rolling Hills Park Plan Familiarity (Peters Township Residents)

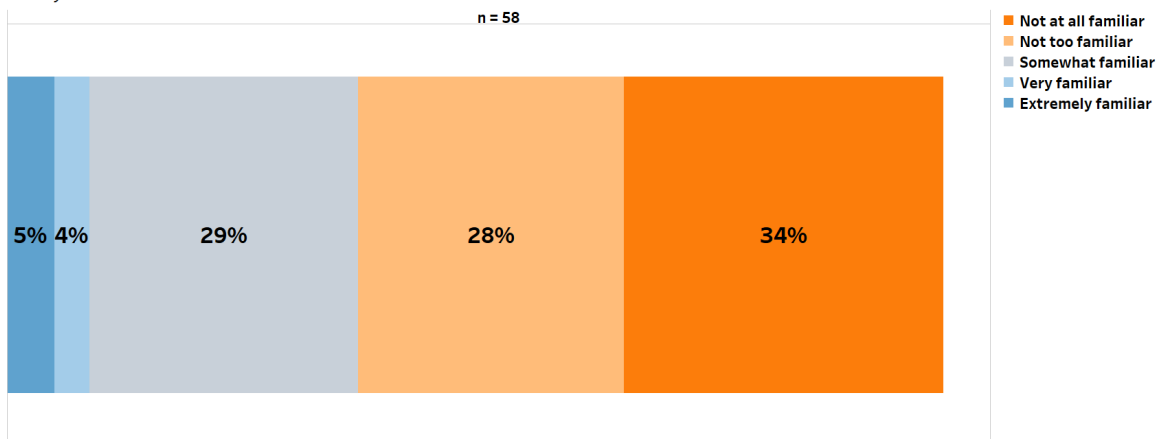
Q11: How familiar are you with the Master Plan for Rolling Hills Park? This proposed park is located on East McMurray Road at the former Rolling Hills Country Club site.



Compared to Peters Township residents, other townships’ residents are not as familiar with the Master Plan, with 34% indicating they are “not at all familiar.”

Rolling Hills Park Plan Familiarity (Other Townships’ Residents)

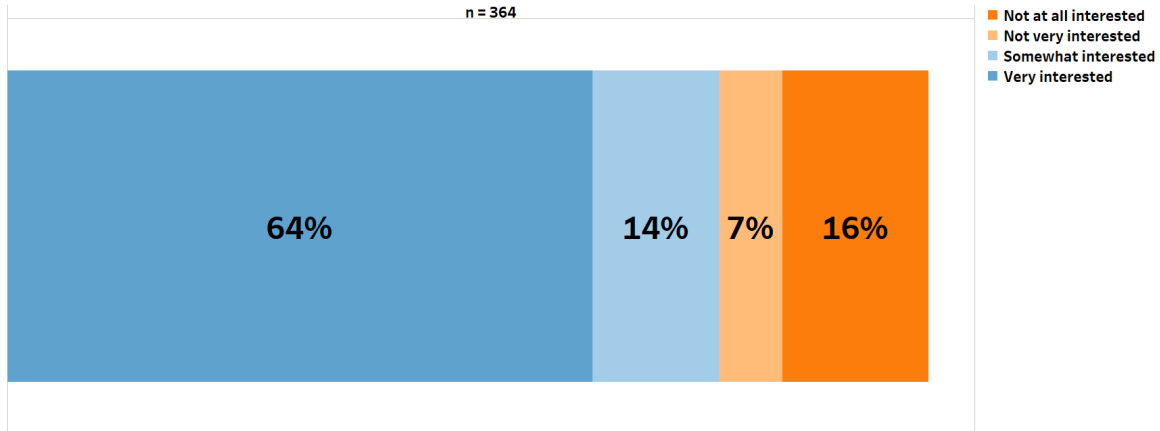
Q11: How familiar are you with the Master Plan for Rolling Hills Park? This proposed park is located on East McMurray Road at the former Rolling Hills Country Club site.



Both Peters and other townships' residents feel positive about the idea of having an outdoor community aquatic center available to them and their families as part of the development of the Rolling Hills Park. Nearly eight in ten Peters residents (78%) responded in the top two boxes ("very interested" or "somewhat interested").

Reaction to Outdoor Aquatic Facility Description (Peters Township Residents)

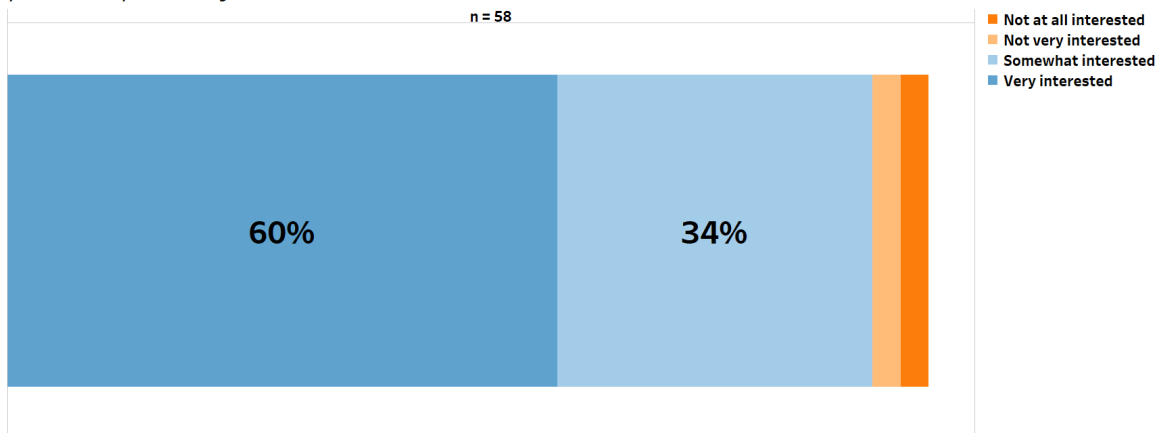
Q12: Based on this information, what is your reaction to the idea of having an outdoor community aquatic facility available to you and your family as part of the development of Rolling Hills Park?



The response from residents of other townships was even higher, with 94% saying they were at least somewhat interested.

Reaction to Outdoor Aquatic Facility Description (Other Townships' Residents)

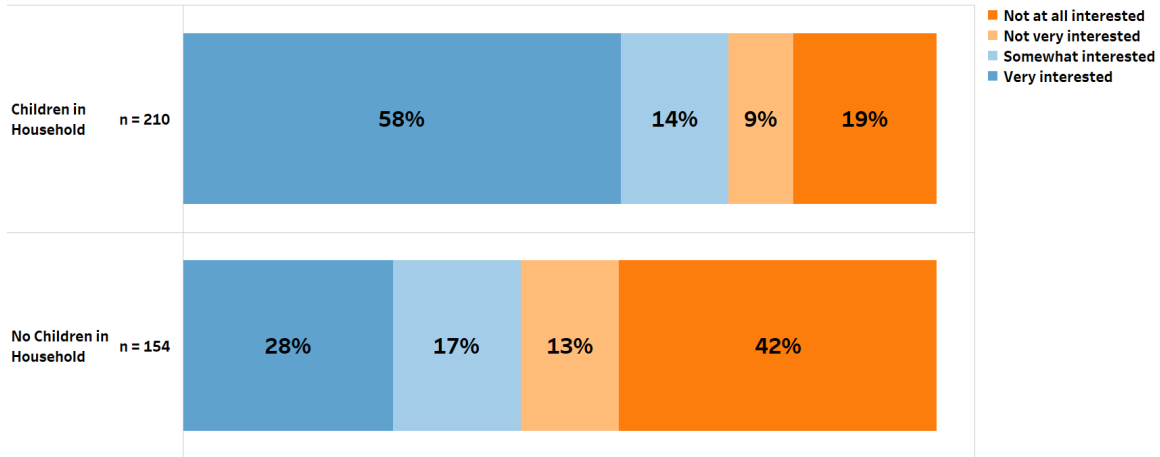
Q12: Based on this information, what is your reaction to the idea of having an outdoor community aquatic facility available to you and your family as part of the development of Rolling Hills Park?



Peters residents with children in the household were more likely than those without to respond positively to the idea of an outdoor community aquatic center at Rolling Hills Park. Peters residents with children in the household responded with 72% in the top two boxes, while Peters residents with no children in the household responded with 45% in the top two boxes.

Reaction to Outdoor Aquatic Facility Description (Peters Township Residents)

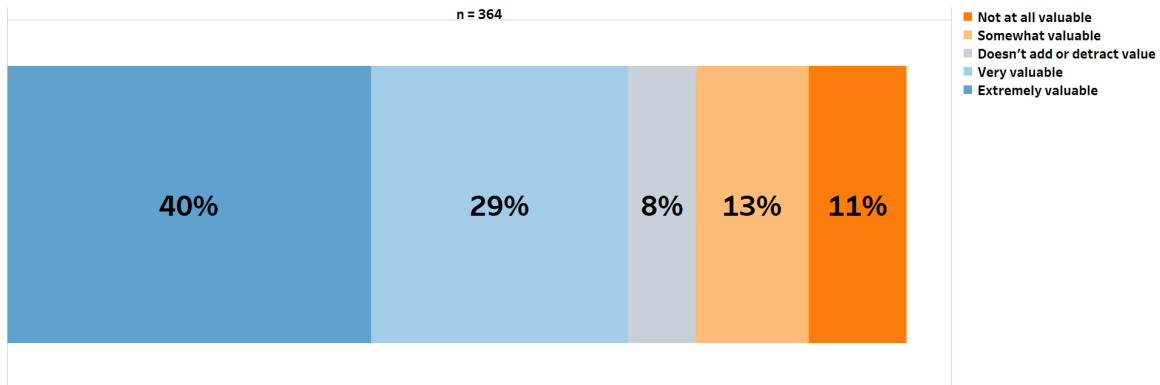
Q12: Based on this information, what is your reaction to the idea of having an outdoor community aquatic facility available to you and your family as part of the development of Rolling Hills Park?



Peters residents generally believe that the presence of an outdoor community aquatic center will have a positive impact on Peters' desirability as a place to live. 69% believe an outdoor aquatic center would be either "very valuable" or "extremely valuable" to the township's desirability.

Outdoor Aquatics Center's Effect on Peters' Desirability (Peters Township Residents)

Q16: How valuable do you feel the presence of an outdoor community aquatic center would be to Peters Township being perceived as a desirable place to live?

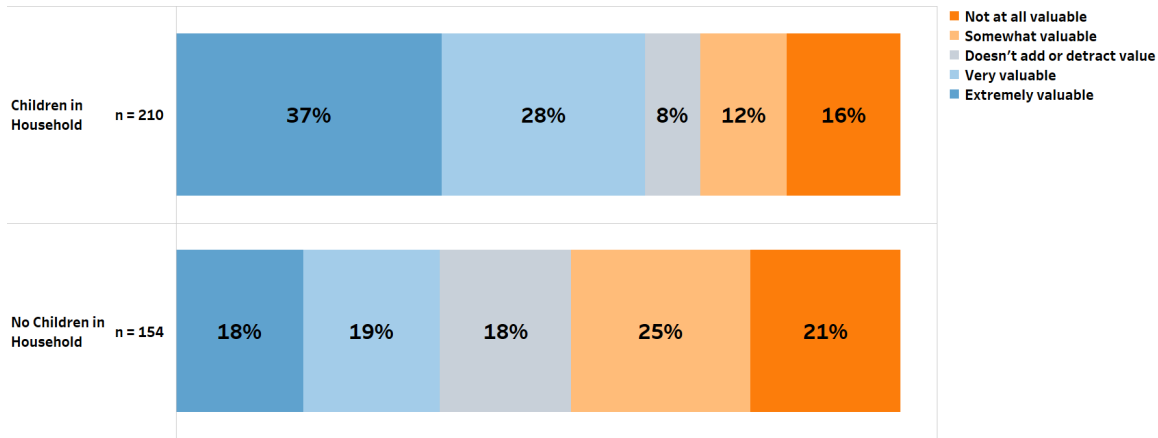


Peters residents who have children in the household, who are younger than 40 years old, or who have incomes greater than \$150,000 tend to believe even more strongly than others that an outdoor community aquatic center would have a positive impact on Peters Township’s desirability.

For instance, 65% of Peters residents with children in the household responded in the top two boxes on this question, compared to just 37% top-two-box responses among those with no children.

Outdoor Aquatics Center’s Effect on Peters’ Desirability (Peters Township Residents)

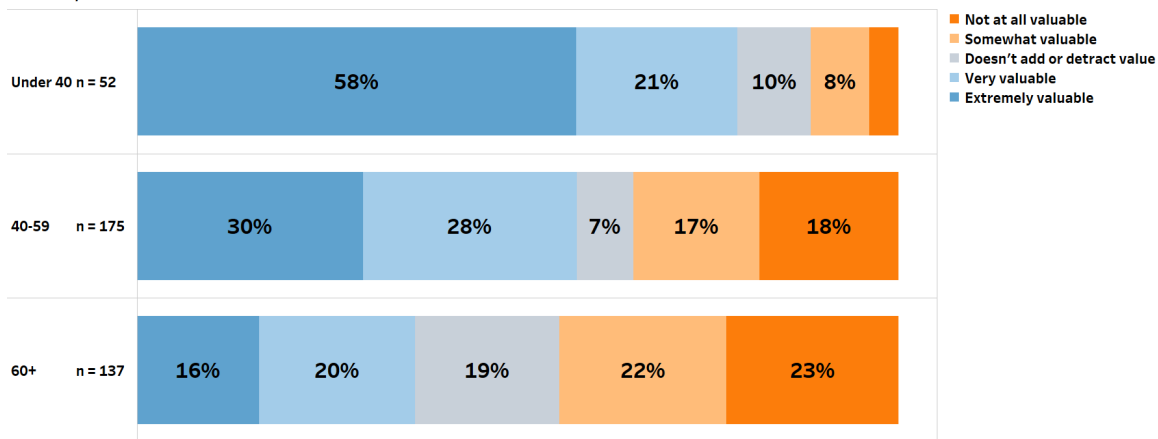
Q16: How valuable do you feel the presence of an outdoor community aquatic center would be to Peters Township being perceived as a desirable place to live?



79% of Peters residents under the age of 40 responded in the top two boxes regarding an outdoor aquatic center’s effect on Peters’ desirability, compared to just 58% of respondents between 40 and 59 years old, and 36% of respondents aged 60 or older.

Outdoor Aquatics Center’s Effect on Peters’ Desirability (Peters Township Residents)

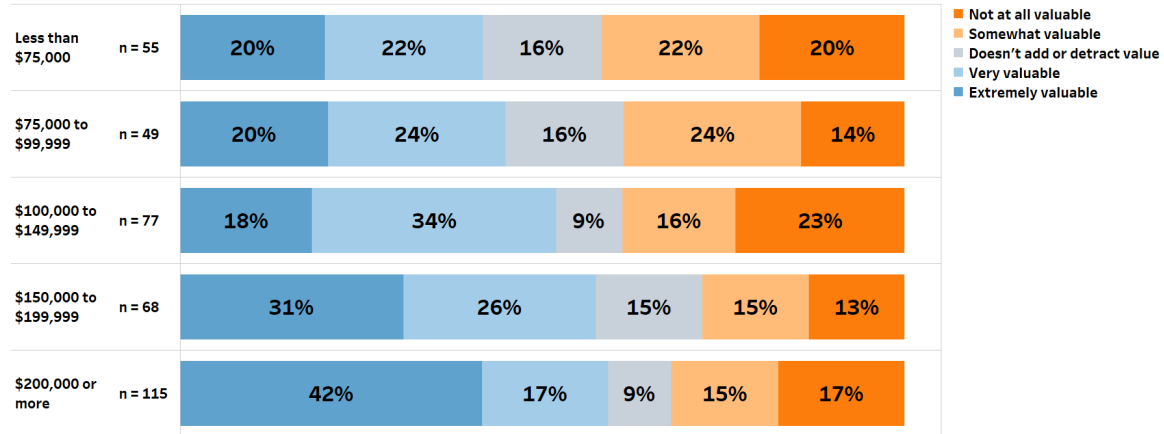
Q16: How valuable do you feel the presence of an outdoor community aquatic center would be to Peters Township being perceived as a desirable place to live?



57% of Peters residents with an annual household income between \$150,000 and \$199,999 responded in the top two boxes, as did 59% of Peters residents earning household income over \$200,000, distinctly higher than their lower-income counterparts.

Outdoor Aquatics Center's Effect on Peters' Desirability (Peters Township Residents)

Q16: How valuable do you feel the presence of an outdoor community aquatic center would be to Peters Township being perceived as a desirable place to live?



As Peters Township evaluates the potential outdoor aquatic center, leadership should be mindful of this impact on the township's desirability, which appeals more favorably to residents with children, residents under the age of 40, and residents who earn higher incomes.

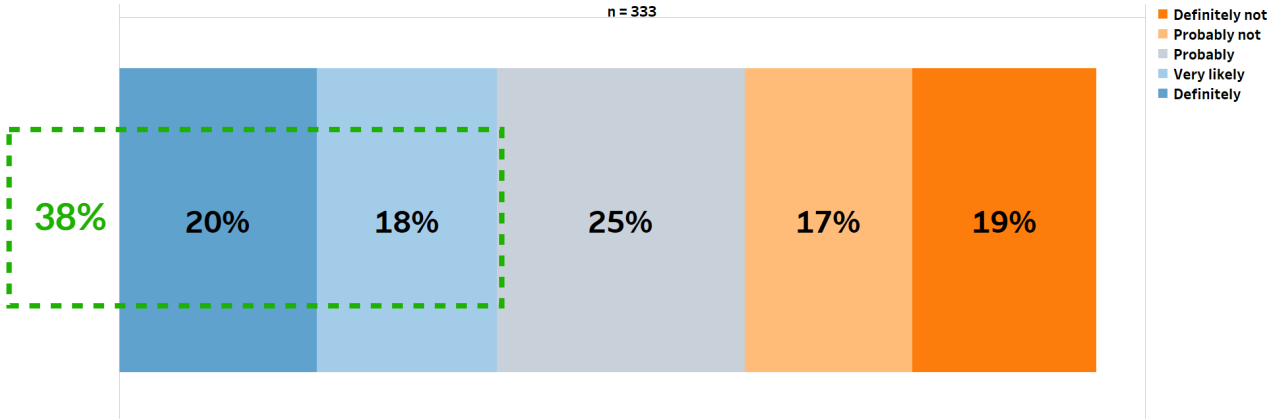
Peters Township Residents' Intent to Purchase Memberships

For an outdoor community pool, Peters residents are more interested in purchasing a family membership than an individual membership. Top-two-box responses for these types of passes were 38% and 30%, respectively.

Likelihood to Purchase Family Membership (Peters Township Residents)

Q18 Pre: Based on the size of your family, would you be likely to purchase a family season membership to a community outdoor aquatic facility for the corresponding fee?

n = 333

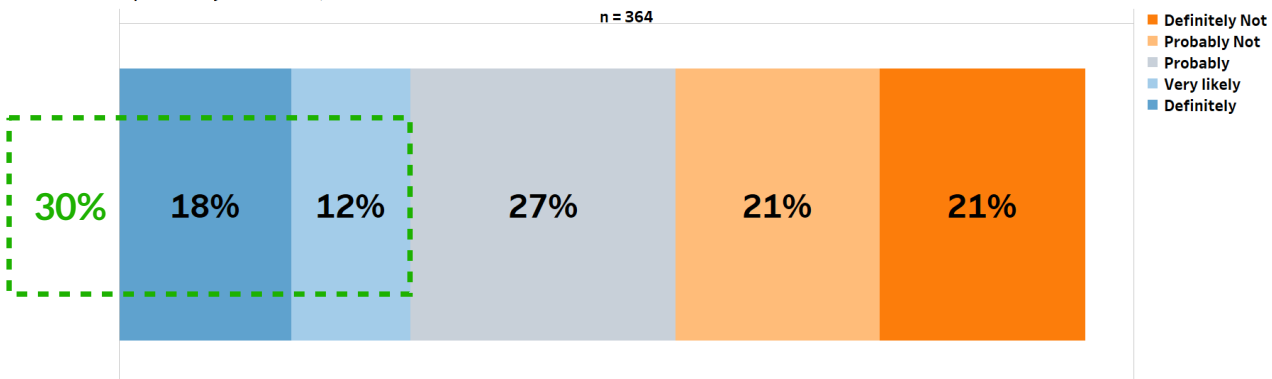


Likelihood to Purchase Individual Membership at \$105 (Peters Township Residents)

Q17: The following questions relate to monthly fees for a membership to the proposed outdoor aquatic center. Individual and family memberships will be available. A membership would give you access to the aquatic center for the summer and discounts on fee-based programs. Guests would pay a per-day rate.

Now consider pricing for an all-summer INDIVIDUAL membership. Would you be likely to purchase an individual season membership to a community aquatic facility if the fee was \$105 for the season?

n = 364

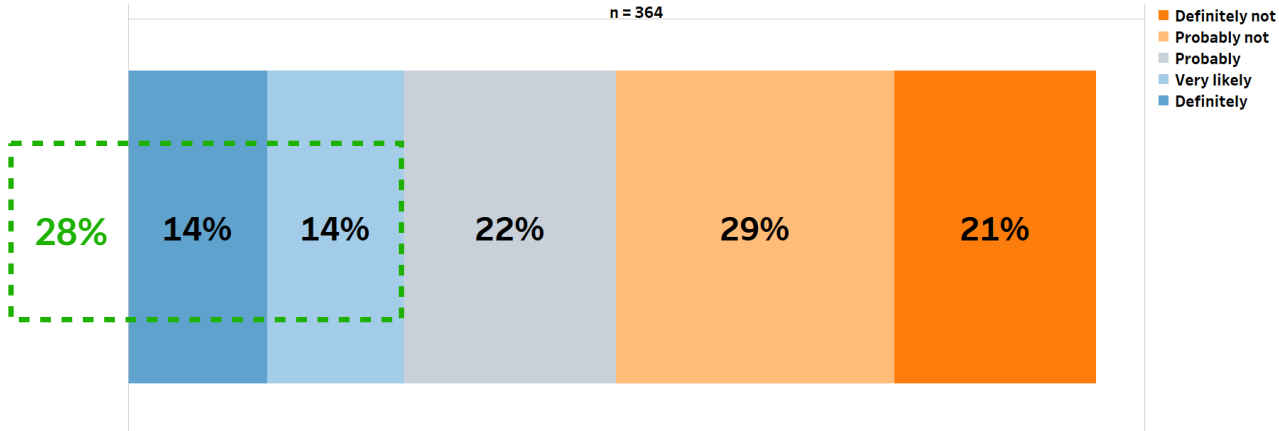


The opposite pattern occurs when it comes to purchasing memberships to a higher-priced offering with an indoor pool. Here, they are more interested in individual memberships than family memberships. Top-two-box likelihood to purchase for these types of passes were 28% and 24%, respectively.

Likelihood to Purchase Individual Membership for Indoor Aquatics Center (Peters Township Residents)

Q22: If the community aquatic center included a year round INDOOR pool suitable for lap swimming, instructional swim classes, group events, and aquatic programs such as water aerobics, would you be likely to purchase an individual annual membership if the fee was \$50 per month? Family memberships will also be available.

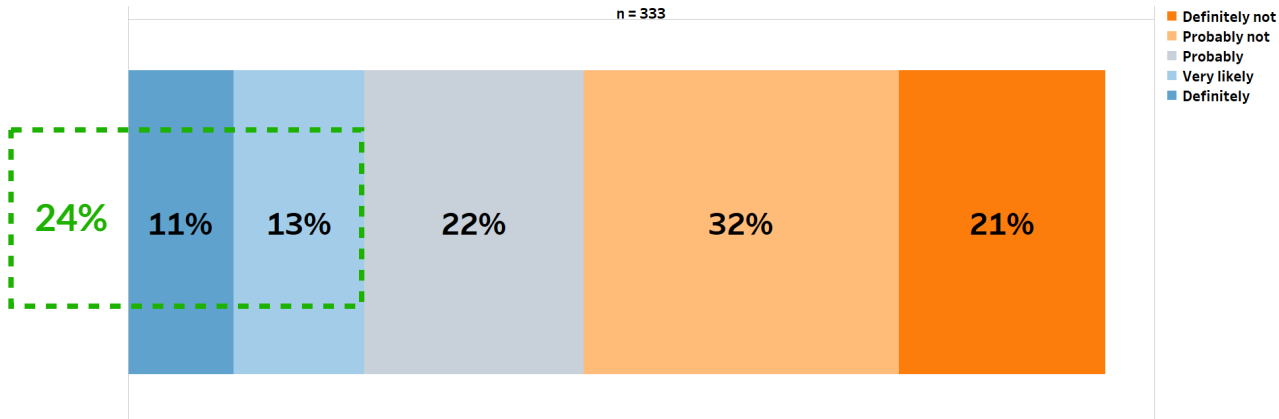
n = 364



Indoor Aquatic Center - Likelihood to Purchase Family Membership (Peters Township Residents)

Q23 Pre: If the community aquatic center included a year round indoor pool suitable for lap swimming, instructional swim classes, group events and aquatic programs such as water aerobics, would you be likely to purchase a family annual membership for the corresponding monthly fee?

n = 333



In summary, based on top-two-box scores, Peters residents say they are about equally likely to purchase individual memberships to an outdoor pool as they are an option with an indoor pool (30% vs. 28%). The spread between intent to purchase outdoor vs. indoor pool passes increases to 14 points, however, when we look at family memberships. 38% of Peters residents said they were "definitely" or "very likely" to purchase family memberships for an outdoor pool, while only 24% of residents would "definitely" or "very likely" purchase family memberships for an indoor pool.

Other Townships' Residents' Intent to Purchase Memberships

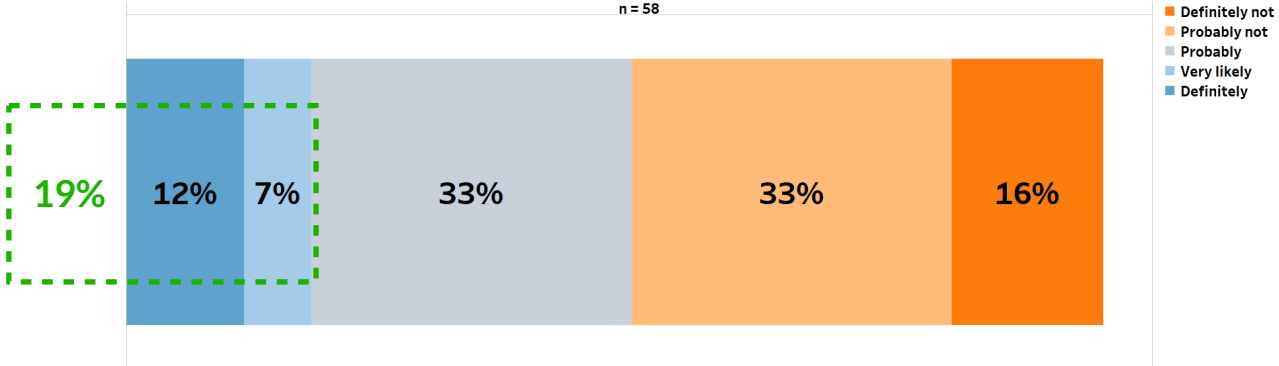
For an outdoor pool, other townships' residents are essentially equally likely to purchase individual and family memberships, at 19% and 18% top-two-box, respectively.

Likelihood to Purchase Individual Membership at \$130 (Other Townships' Residents)

Q36: The following questions relate to monthly fees for a membership to the proposed outdoor aquatic center. Individual and family memberships will be available. A membership would give you access to the aquatic center for the summer and discounts on fee-based programs. Guests would pay a per-day rate.

Now consider pricing for an all-summer INDIVIDUAL membership. Would you be likely to purchase an individual season membership to a community aquatic facility if the fee was \$130 for the season?

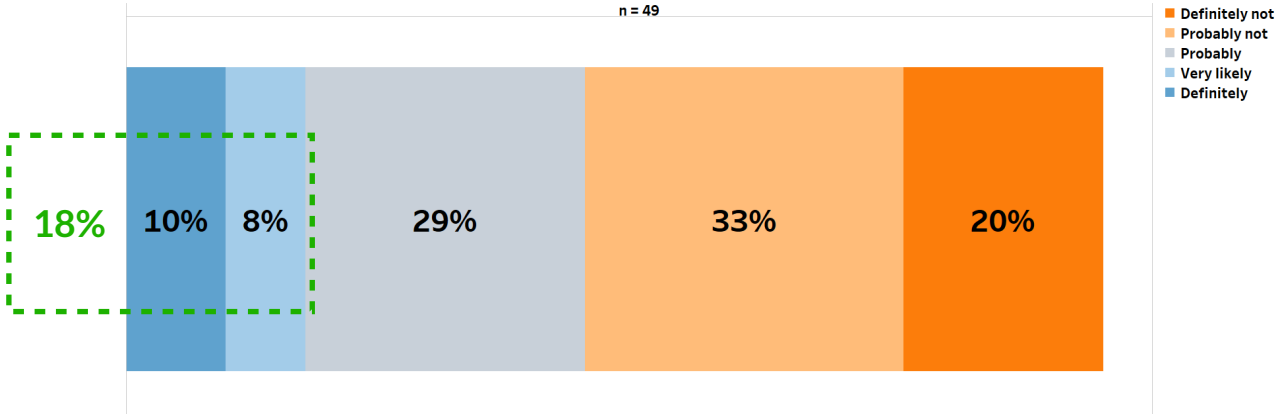
n = 58



Likelihood to Purchase Family Membership (Other Townships' Residents)

Q18 Pre: Based on the size of your family, would you be likely to purchase a family season membership to a community outdoor aquatic facility for the corresponding fee?

n = 49

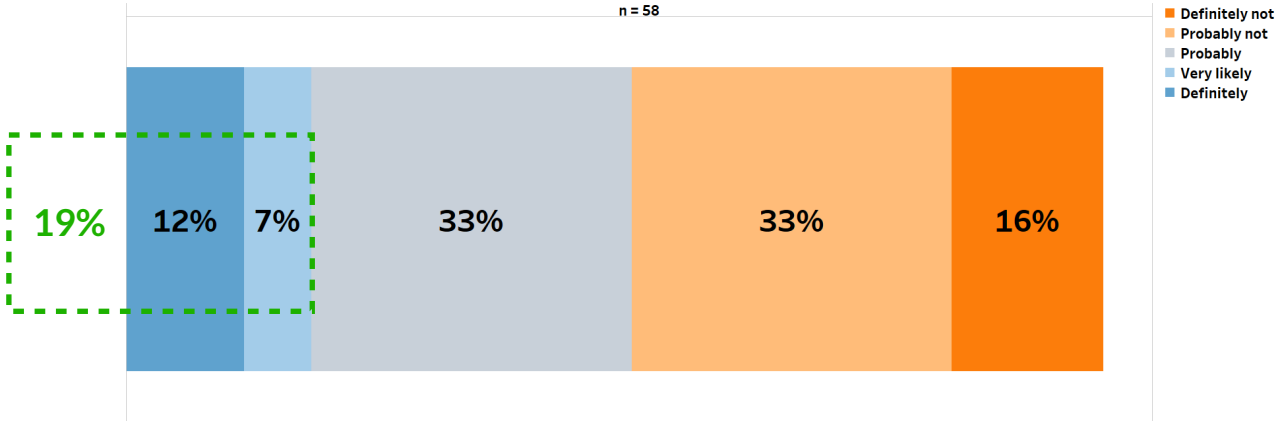


A similar percentage said they would "definitely" or "very likely" purchase an individual membership for an indoor pool, as well. However, they expressed a distinctly higher level of interest in family memberships for offering that includes an indoor pool, at 32%.

Non-Residents' Likelihood to Purchase Individual Membership for Indoor Aquatics Center

Q37: If the community aquatic center included a year round INDOOR pool suitable for lap swimming, instructional swim classes, group events, and aquatic programs such as water aerobics, would you be likely to purchase an individual annual membership if the fee was \$60 per month? Family memberships will also be available.

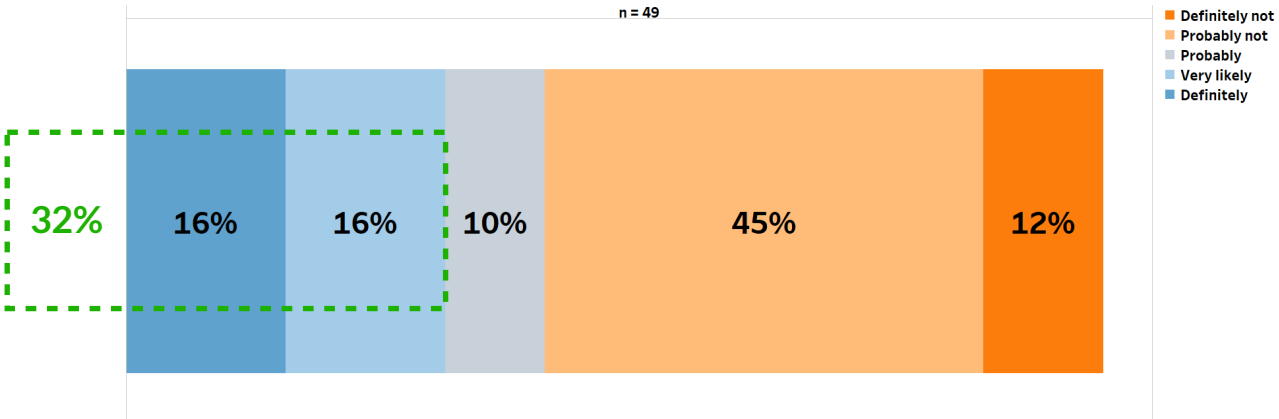
n = 58



Non-Residents' Likelihood to Purchase Family Membership for Indoor Aquatics Center

Q39 Pre: If the community aquatic center included a year round indoor pool suitable for lap swimming, instructional swim classes, group events and aquatic programs such as water aerobics, would you be likely to purchase a family annual membership for the corresponding monthly fee?

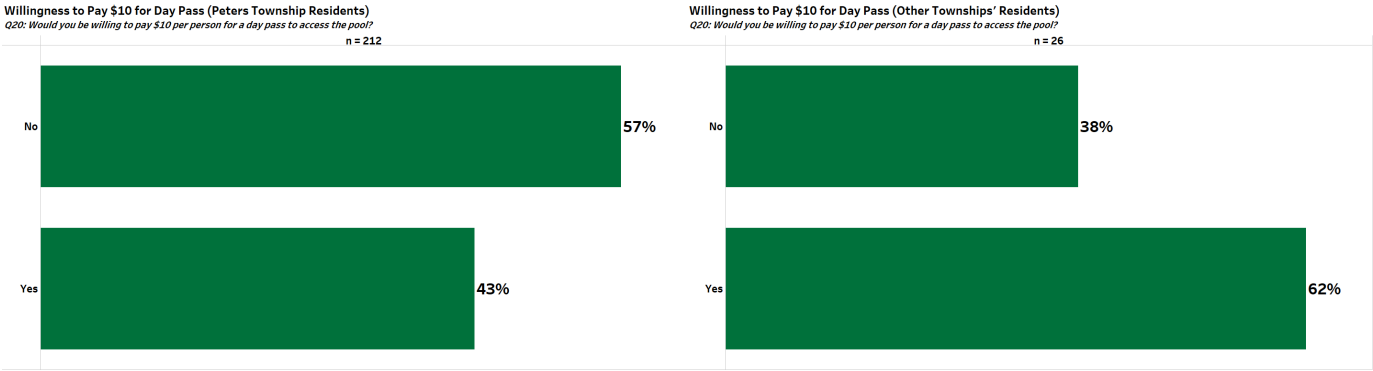
n = 49



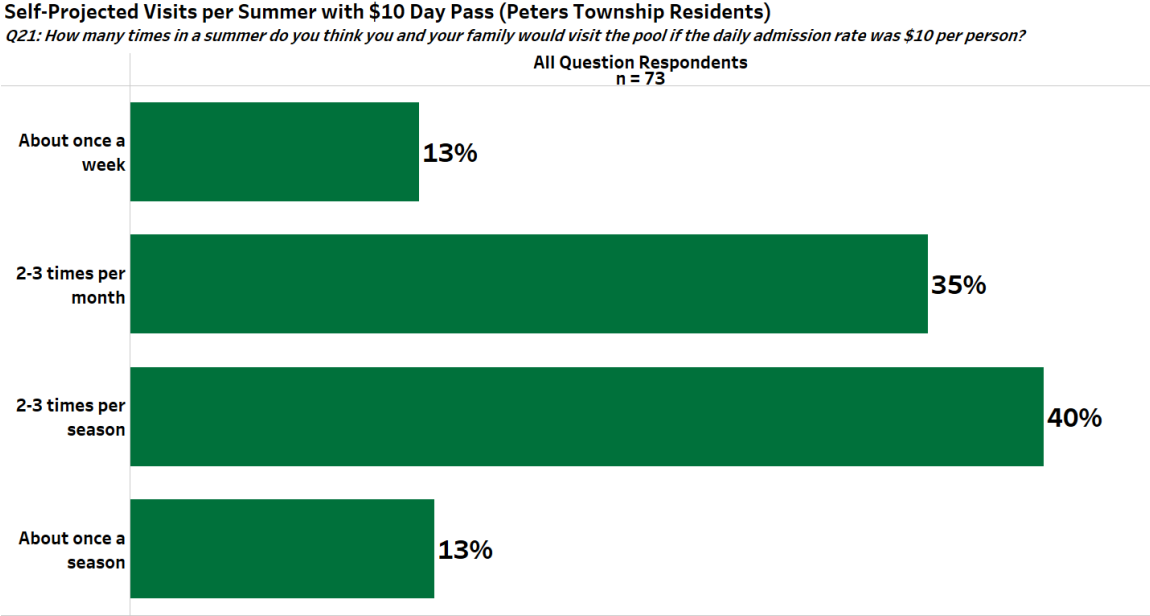
In summary, other townships' residents are just as likely to purchase individual memberships for an outdoor pool as for an indoor pool—the portion of responses in the top two boxes is 19% for each. The likelihood for other townships' residents to purchase a family membership for an outdoor pool is about the same, with 18% of responses in the top two boxes. But other townships' residents are much more likely to purchase family memberships for an indoor pool, with 32% of responses in the top two boxes.

Interest in Purchasing a Day Pass

Survey respondents were asked about their willingness to pay \$10 for a day pass to access the pool, and then asked about the frequency at which they might purchase such a day pass. While the sample size for other townships' residents on this question is very small, those residents were notably more likely to say they were interested in a day pass.



Peters Township residents are most interested in purchasing a day pass 2-3 times per season, with 40% selecting this option, followed by 2-3 times per month, with 35% selecting this option.

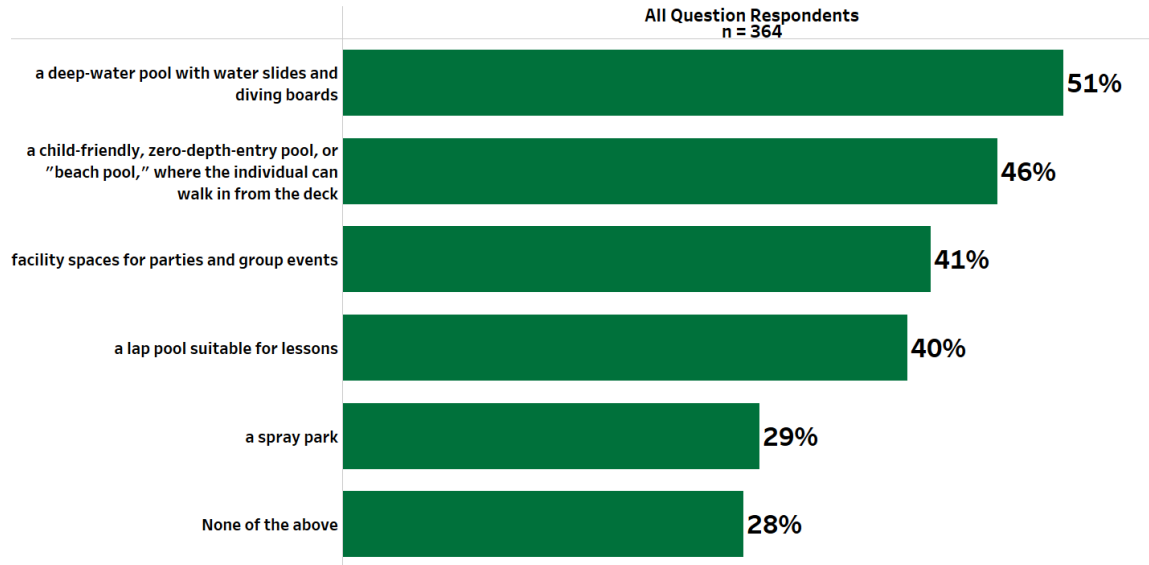


Outdoor Pool Facility Features

Of the outdoor aquatic center's proposed features, Peters residents are most interested in “a deep-water pool with water slides and diving boards” and “a child-friendly, zero-depth-entry pool, or 'beach pool,' where the individual can walk in from the deck.” Other townships’ residents follow the same response pattern as residents; however, their interest in each of the categories is slightly lower.

Most Attractive Facility Features (Peters Township Residents)

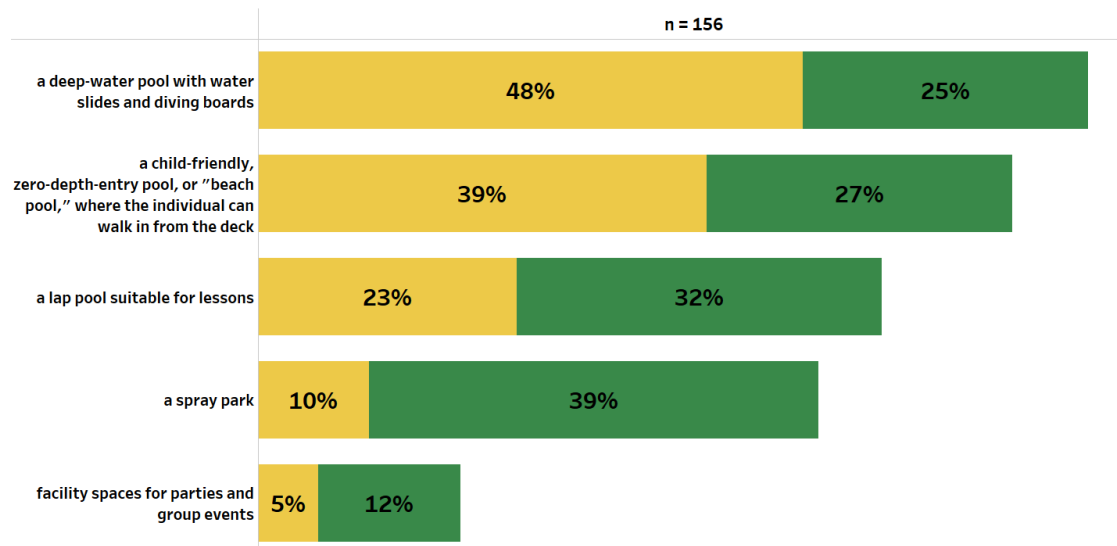
Q13: Which features of the proposed facility are of most interest to you and your family? Select all that apply.



When residents were asked to rank their interest in the potential facility features, “a deep-water pool with water slides and diving boards” and “a child-friendly, zero-depth-entry pool, or 'beach pool,' where the individual can walk in from the deck” remained as the top two features.

Ranked Interest in Potential Facility Features (Peters Township Residents)

Q35: Please rank the features of the proposed facility that are of most interest to you and your family? Click and drag the features to rank.



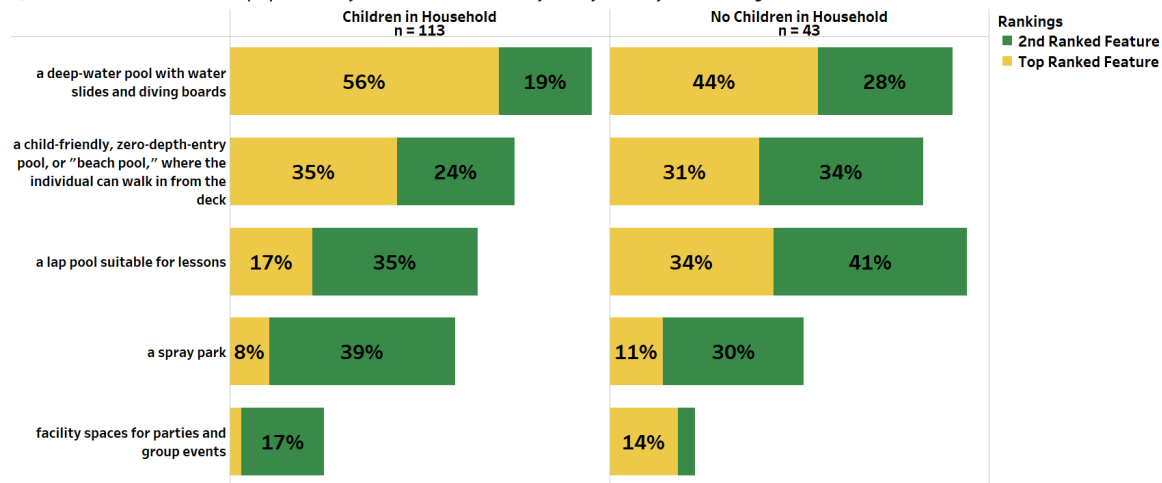
Rankings

- 2nd Ranked Feature
- Top Ranked Feature

For Peters residents, the top two potential features for respondents with children in the household are the same as the overall top two features; however, for households with no children, “a lap pool suitable for lessons” is more appealing.

Ranked Interest in Potential Facility Features (Peters Township Residents)

Q35: Please rank the features of the proposed facility that are of most interest to you and your family? Click and drag the features to rank.

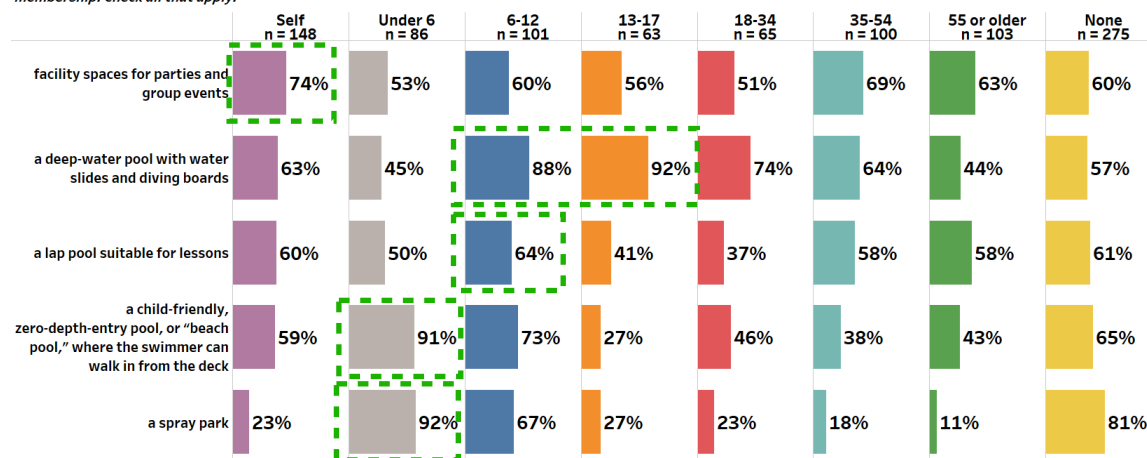


Peters Township residents were also asked to indicate which facility features they are interested in for themselves and for other members of their households at various ages. Below is a summary of the most appealing features by age group:

- “Facility spaces for parties and group events” appeals the most to the survey-takers themselves
- “A deep-water pool with water slides and diving boards” appeals most to 6-17 year olds
- “A lap pool suitable for lessons” appeals to most of the age categories listed, with a slight increase for 6-12 year olds
- “A child-friendly, zero-depth-entry pool, or 'beach pool,' where the swimmer can walk in from the deck" appeals mostly to children under 6
- “A spray park” appeals mostly to children under 6, and is significantly less likely to appeal to ages 13-55+

Projected Facility Feature Usage by Age Group (Peters Township Residents)

Q14: The below features would be included in a membership to the outdoor community aquatic center. Assuming you would find the membership fee affordable, please indicate by their age group which, if any, members of your household, including yourself, would be at least somewhat likely to use each of the potential features as part of a membership. Check all that apply.



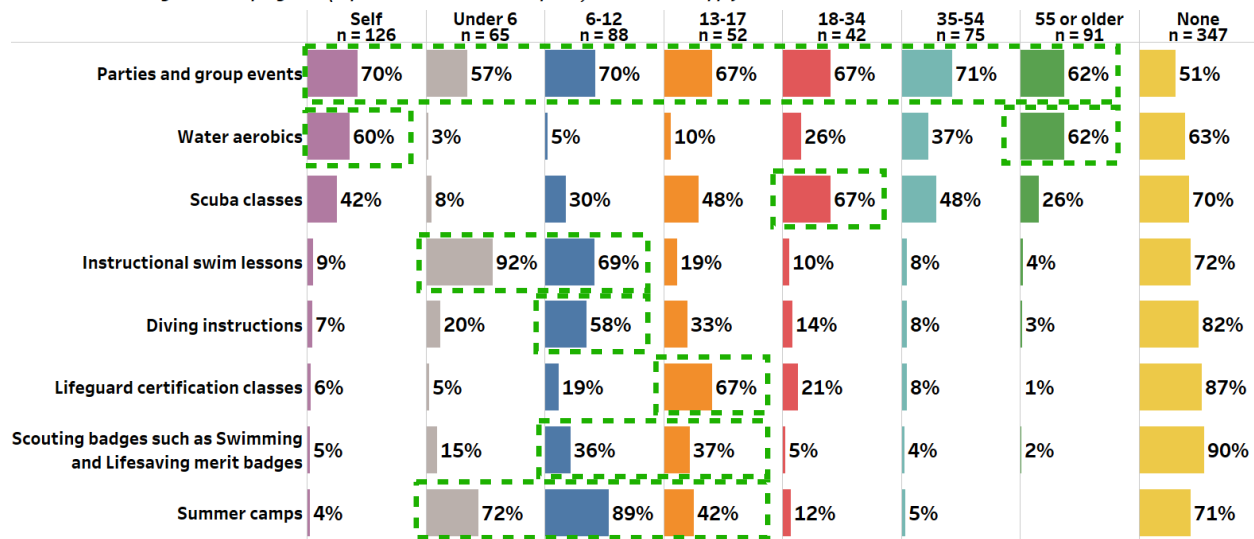
The responses from residents of other townships regarding projected facility feature usage by age group follow similar patterns to those of Peters residents. Information regarding other townships' residents' interests in facility features can be found in the appendix.

Separate from a membership fee, Peters residents were asked their interest in fee-based programs. The information below provides Township leadership with the opportunity to advertise fee-based programs to households based on the age of the children in households. Below is a summary of the most appealing fee-based programs based on the age group:

- “Parties and group events” is the most appealing across all age ranges
- “Water aerobics” appeals mainly to the survey-takers themselves and individuals over the age of 55
- “Scuba classes” appeal to the survey-takers and also a large percentage of 18-34 year olds
- “Instructional swim lessons” is appealing primarily to individuals under the age of 12
- “Diving instructions” appeal to mostly 6-12 year olds
- “Lifeguard certification classes” appeal to ages 13-17
- “Scouting badges such as Swimming and Lifesaving merit badges” is most appealing to 6-17 year olds
- “Summer camps” are most appealing to those under the age of 17

Fee-Based Program Interest (Peters Township Residents)

Q15: Including yourself, please indicate by their age group which, if any, members of your household you think would be at least somewhat likely to participate in each of the following fee-based programs (separate from a membership fee.) Select all that apply.



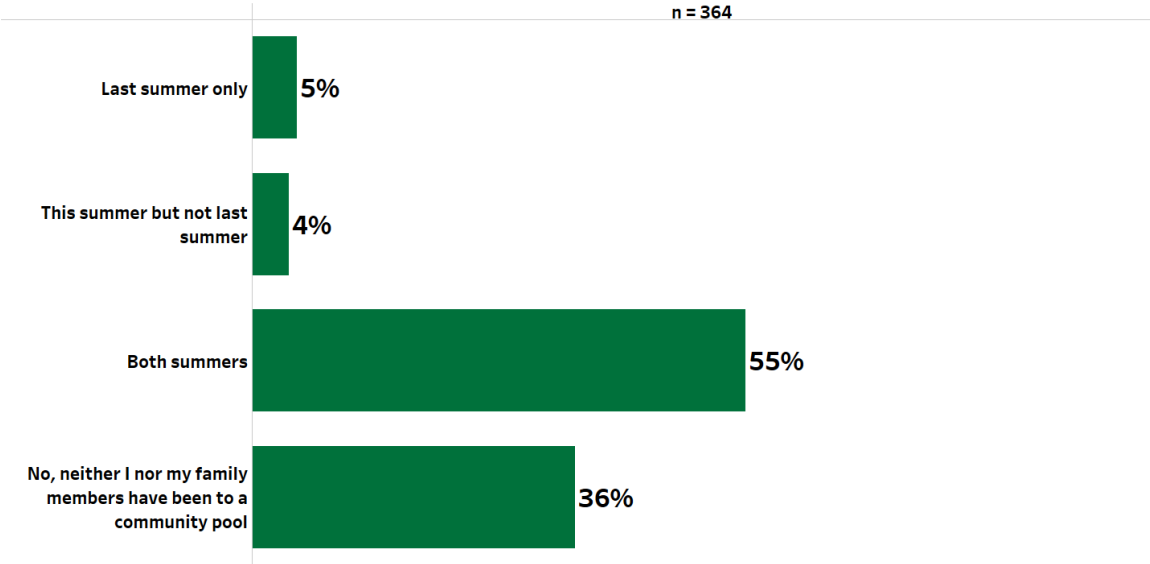
The responses from residents of other townships regarding fee-based programs follow a similar pattern to those from Peters residents, except that “water aerobics” garners more interest in the 35-54 year old age group from non-Peters residents.

Respondent Pool Usage

About two-thirds, 64%, of Peters Township residents have used an outdoor community pool at some point in the last two summers.

Outdoor Community Pool Usage (Peters Township Residents)

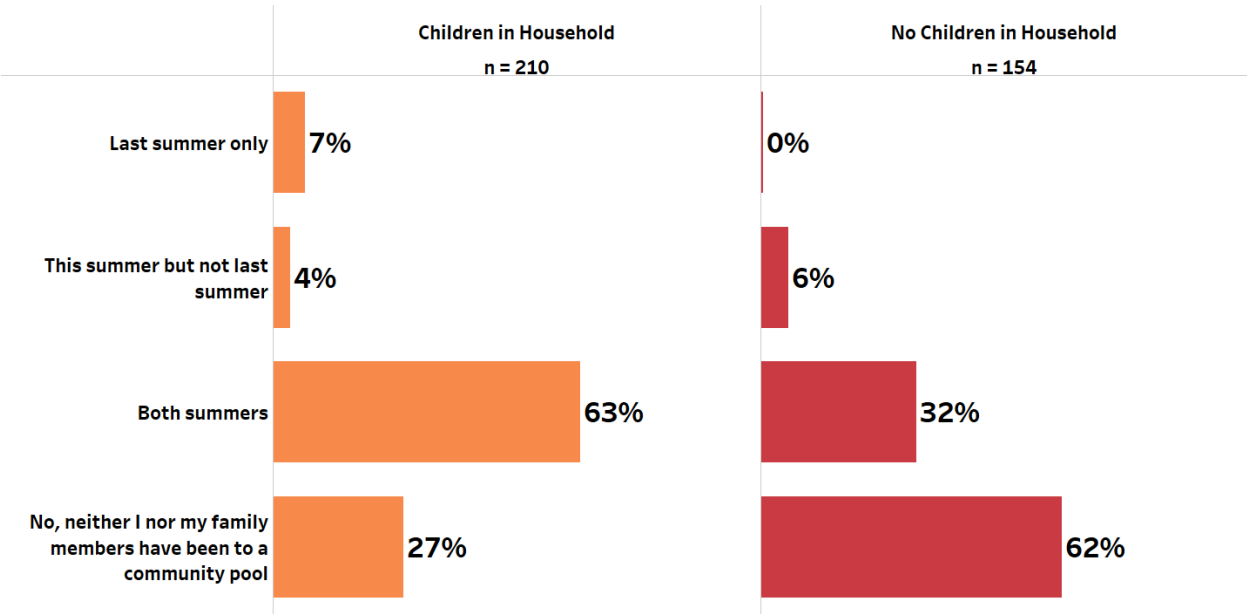
Q6: Have you or members of your family used an outdoor community pool for recreation this summer (2019) and/or last summer (2018)?



Residents with children in the household are almost twice as likely to have used a community outdoor pool as residents without children at some point in the last two summers. 74% of Peters Township residents with children in the household have used an outdoor community pool at some point in the past two summers, compared to just 38% of residents with no children in the household.

Outdoor Community Pool Usage (Peters Township Residents)

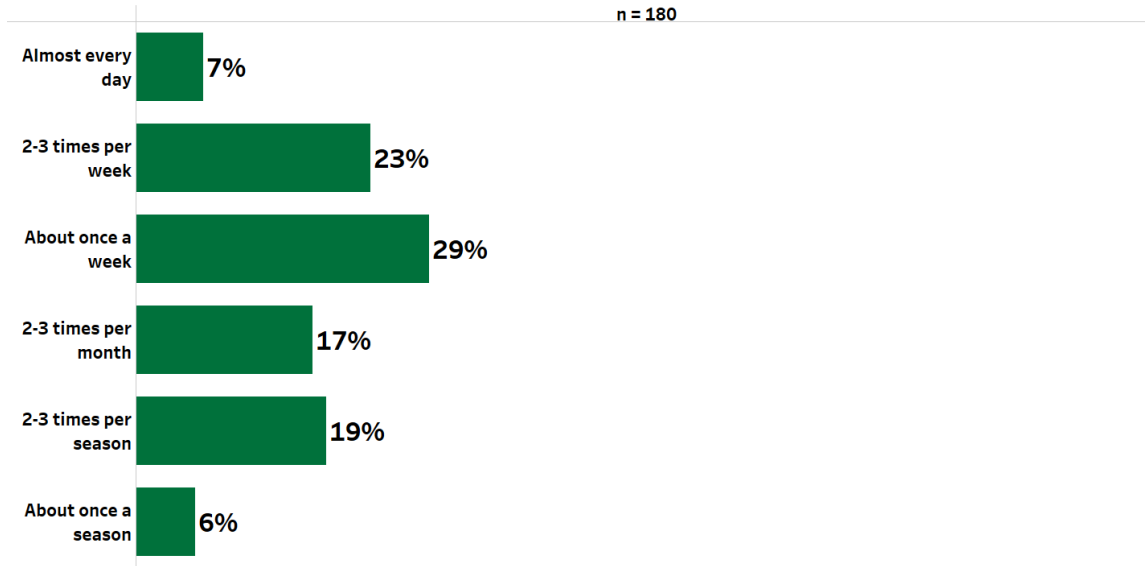
Q6: Have you or members of your family used an outdoor community pool for recreation this summer (2019) and/or last summer (2018)?



Among the Peters residents who use an outdoor community pool, 59% reported going at least once per week during the season.

Frequency of Using Outdoor Community Pools (Peters Township Residents)

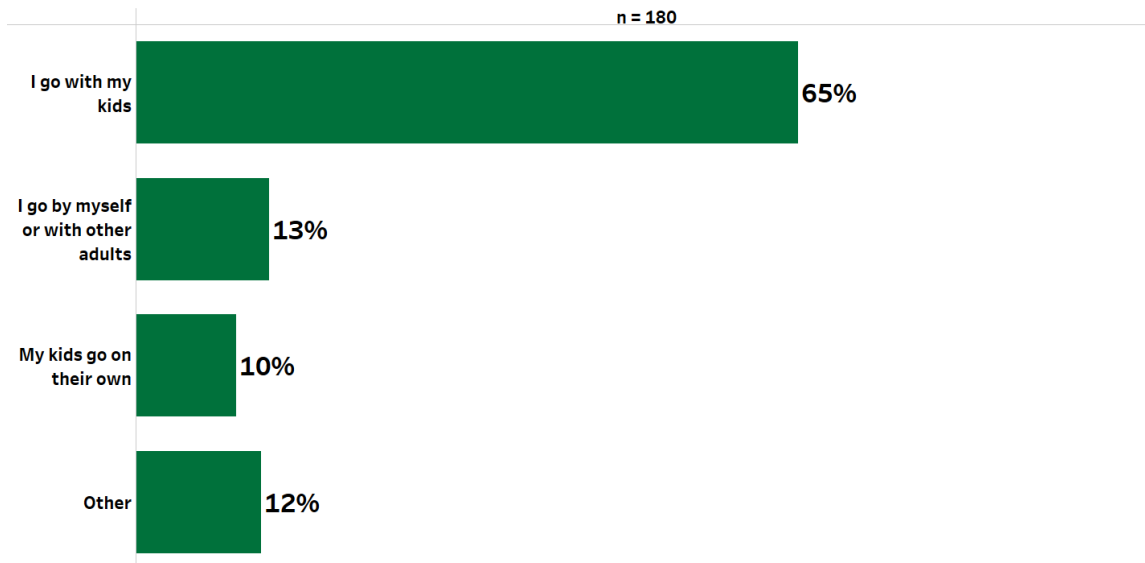
Q8: During the season, how often do you or your family go to an outdoor community pool for recreation?



Peters residents who use an outdoor community pool generally go to the pool with their kids, this was the case for 65% of respondents.

Visiting Community Pool (Peters Township Residents)

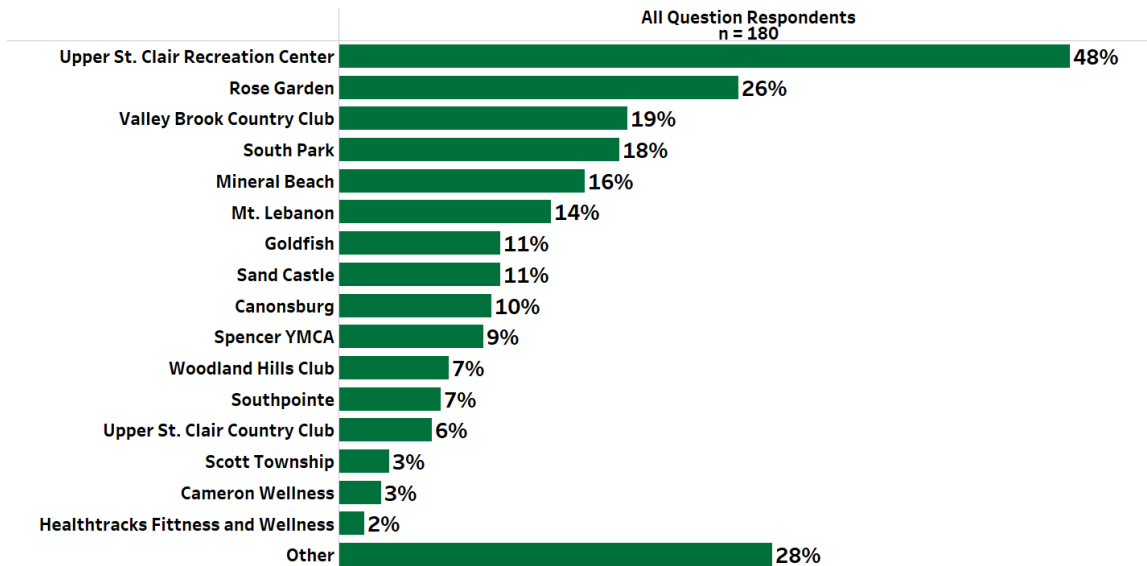
Q9: Who usually goes to the outdoor community pool?



When visiting a pool over the last two summers, Peters residents are most commonly visiting the Upper St. Clair Recreation Center and the Rose Garden, as well as a variety of other pools registering lower incidences.

Pools Visited Over Past Two Summers (Peters Township Residents)

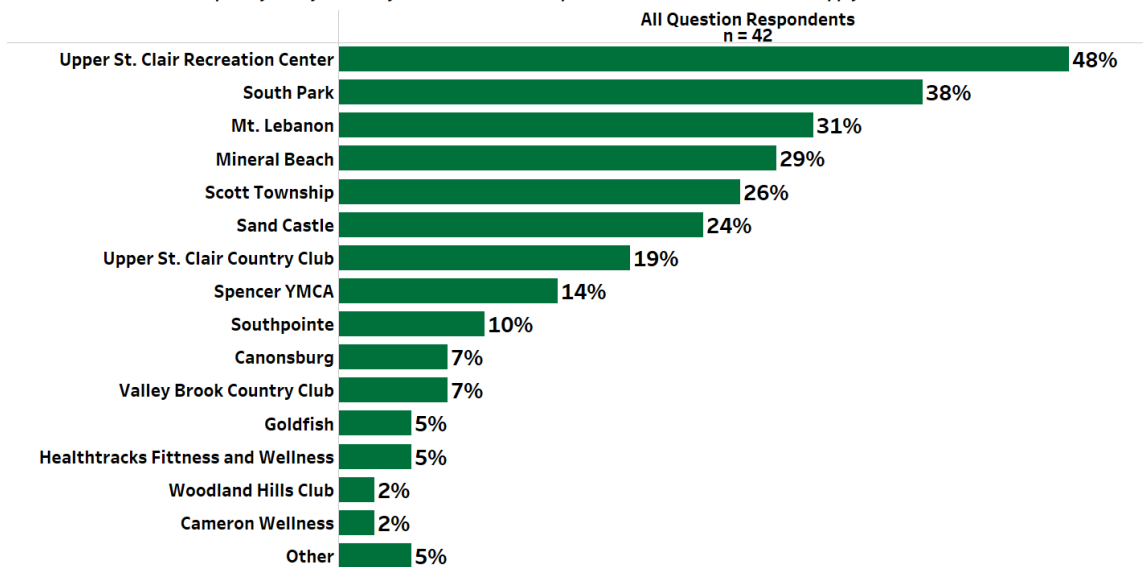
Q10: Please indicate which pools you or your family have visited over the past two summers. Select all that apply.



Other townships' residents are visiting a much wider variety of pools, with the Upper St. Clair Recreation Center being the most visited pool, followed by South Park.

Pools Visited Over Past Two Summers (Other Townships' Residents)

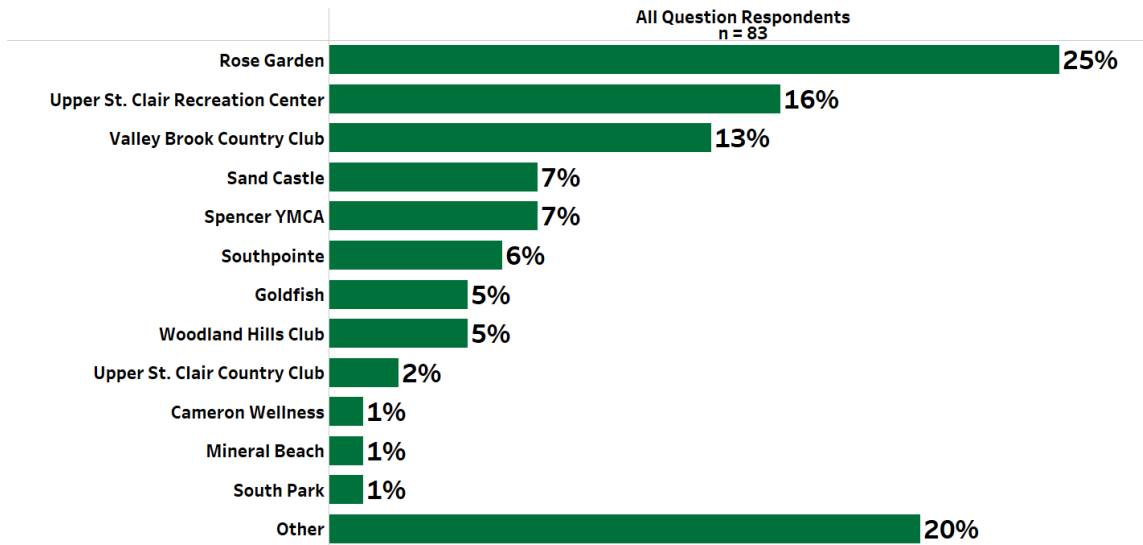
Q10: Please indicate which pools you or your family have visited over the past two summers. Select all that apply.



Peters residents are most likely to have a membership to the Rose Garden pool, followed by Upper St. Clair Recreation Center.

Household's Pool Memberships (Peters Township Residents)

Q10 Visit: Please indicate which pools your household had a summer membership for this year. Select all that apply or click next if you had no summer memberships.



Other townships are most likely to have a membership at Upper St. Clair Recreation Center, followed by South Park and Mt. Lebanon. (The chart below shows counts rather than percentages, due to the small sample size.)

Household's Pool Memberships (Other Townships' Residents)

Q10 Visit: Please indicate which pools your household had a summer membership for this year. Select all that apply or click next if you had no summer memberships.

