



Green County YMCA “Building a Better YMCA” Survey Summary

Introduction:

The Green County YMCA has identified the need for facility and programming expansion in order to better serve current members, to attract non-members to join, and ultimately create a better YMCA experience for all users. As the current facility is becoming dated, crowded, and costly to maintain and repair, the YMCA is seeking consumer data to better understand what the general community expects from the Y, and whether these desired improvements are feasible in the long-term. The data collected from this research project shall inform future actions taken by the YMCA including budgeting, fundraising, facility management, and future program development.

Methods:

Based on information gathered through the focus groups, we developed and administered an online survey (Appendix 1). The focus groups identified several facility improvements that were grouped into five primary areas.

An Aquatic Center

The first are focused on increasing capacity in the aquatic resources available at the Y, noting that there are four main user groups for the pool that each have their distinct needs: lap swimmers, swim teams, aqua-fitness classes, and swim lessons. One potential user group that is currently under served at the YMCA are families seeking a fun, recreational aquatic experience. Users in several groups expressed enthusiasm for the potential of integrating a sauna and/or whirlpool into a revamped YMCA Aquatic center. To support these groups, participants identified a need to renovate the locker/changing rooms, including creation of “dry” areas, and separate spaces for children and adults.

A Fitness Center

A second area focused on increasing capacity to deliver fitness programs. Improvements to address this issue included adding studio space for fitness classes and stretching, replacing the indoor track with one that is both more accessible and larger.

An Athletic Center

A third area centered on athletic programming for both children and adults. Included in this theme were changes related to expanding the gymnasium, enlarging the gymnastics room, aligning the lap pool with competitive standards, and incorporating space for spectators in each of these areas.

A Community Center

A fourth theme focused on providing community space for people of all ages. This need was reflected in suggestions of adding lounge space with a coffee shop, and a youth center with space for children of all ages. Also included in this theme were spaces for additional wellness-related programming. Of particular note was a desire to expand the child watch program and a separate, age-appropriate space for youth too young to use the facilities of the YMCA on their own, but too old for child watch. These upgrades stressed a desire among participants for the YMCA to become more of an active community center that meets wider needs beyond just a “gym and swim.”

A Child Care Center

A fifth theme related more widely to meeting the broader need in the community for affordable childcare. A large grant to the Green County Family YMCA to fund an expansion of child care facilities precluded the need to explore this option further, as the resources necessary to implement these upgrades have been secured.

Survey Development and Administration

To further explore community preferences for potential directions in which to take needed facility improvements related to the first four themes outlined above, an online survey was developed in December 2021 (Appendix 1). Fielded between December 28 and January 7, this survey assessed the degree to which four stakeholder groups supported the YMCA making improvements in these areas, and estimated the likelihood of individuals both contributing to a capital campaign in order to raise funds to build the new facilities and also retaining (or becoming) members of the YMCA in response to the improvements.

To reach as wide an audience as possible a two-prong approach was taken to field the survey.

1. The primary collector used was a direct email invitation sent to current and former members. In all, 4811 valid and unique email addresses were identified from the list and emailed a unique link to the survey. A reminder email was then sent every three days to non-respondents. In all, up to four contacts were implemented. In all, 359 emails bounced, 129 recipients opted out, and 1500 recipients did not open any email. These last could have had the email intercepted by a spam folder, or the email address may have been a “blind” account that is not regularly checked by its owner.

Ultimately, 2842 individuals opened at least one contact. Of these, 1009 clicked through to the survey, and 809 completed enough of the survey to provide useable information, for a response rate of 28.4%.

This collector was particularly important, because it relied on a known sample population, and the responses can be taken as representative of that population.

2. To increase representation of individuals who have never been a member, we supplemented the primary collector by relying on two non-probability sampling approaches. The first of these approaches relied on a paid social media campaign, while the second relied on links shared on the YMCA website and shared by the School District of Monroe to local parents and by Klondike Cheese with their employees. Response to these efforts is presented below (Table 1).

Table 1: Survey response from five collectors used to reach members of the Green County Community.

Survey Collector	Frequency	Percent
Direct Email	809	66%
Klondike	8	1%
Paid Social	144	12%
School District	160	13%
YMCA Website	103	8%
Total	1224	100%

While responses to surveys taken through these collectors do not represent the opinions of the broader public, comparisons to response distributions from responses to the probability sample found no significant differences. As such, these supplementary efforts raised the sample size without skewing inferences about the population represented by the YMCA’s email list.

Caution should, however, be applied when interpreting the results as they pertain to individuals who have never been members. Not only does this group have the fewest responses, but trends in responses for this group mirror those of former members. This suggests that respondents in this group are likely to overrepresent individuals who have taken an interest in the YMCA and perhaps used the facilities without being a member (e.g., through a guest pass, Silver Sneakers, or non-member participation in a paid class.)

Results:

This section provides the results in brief. Please see Appendix 2 for a complete print out of descriptive statistics from the analysis. Appendix 3 presents the optional written comments provided by respondents for consideration by the YMCA board.

Response Profile

Figure 1 presents the membership and sociodemographic characteristics of respondents. In all, 53 percent of responses came from individuals who were current members at the time of the survey, while 34 percent indicated they were members in the past. Only 12 percent of respondents had never been members of the Green County Family YMCA.

Respondents in all membership classes were more likely to be female than male, a trend that was strongest for non-members. These trends are consistent with expectations for responses to online surveys, and societal norms around management of family participation in wellness programs. Age distributions among respondents were consistent with expectations of membership types related to household size (Figure 2) fluctuations over different life stages.

A majority of respondents lived within five miles of the YMCA, with a quarter of current members living within a mile (Figure 1). This finding likely reflects an effect of geographic proximity on awareness and interest in the YMCA facilities, which is greatest in the area of Monroe.

Household income of respondents tended to be higher than US Census estimates for the area, with a majority of respondents reporting income levels greater than the census median income of \$50K. This finding suggest that estimates from this survey reflect the segment of the population that is most likely to have the means to support the YMCA through donations and memberships rather than the Monroe population as a whole.

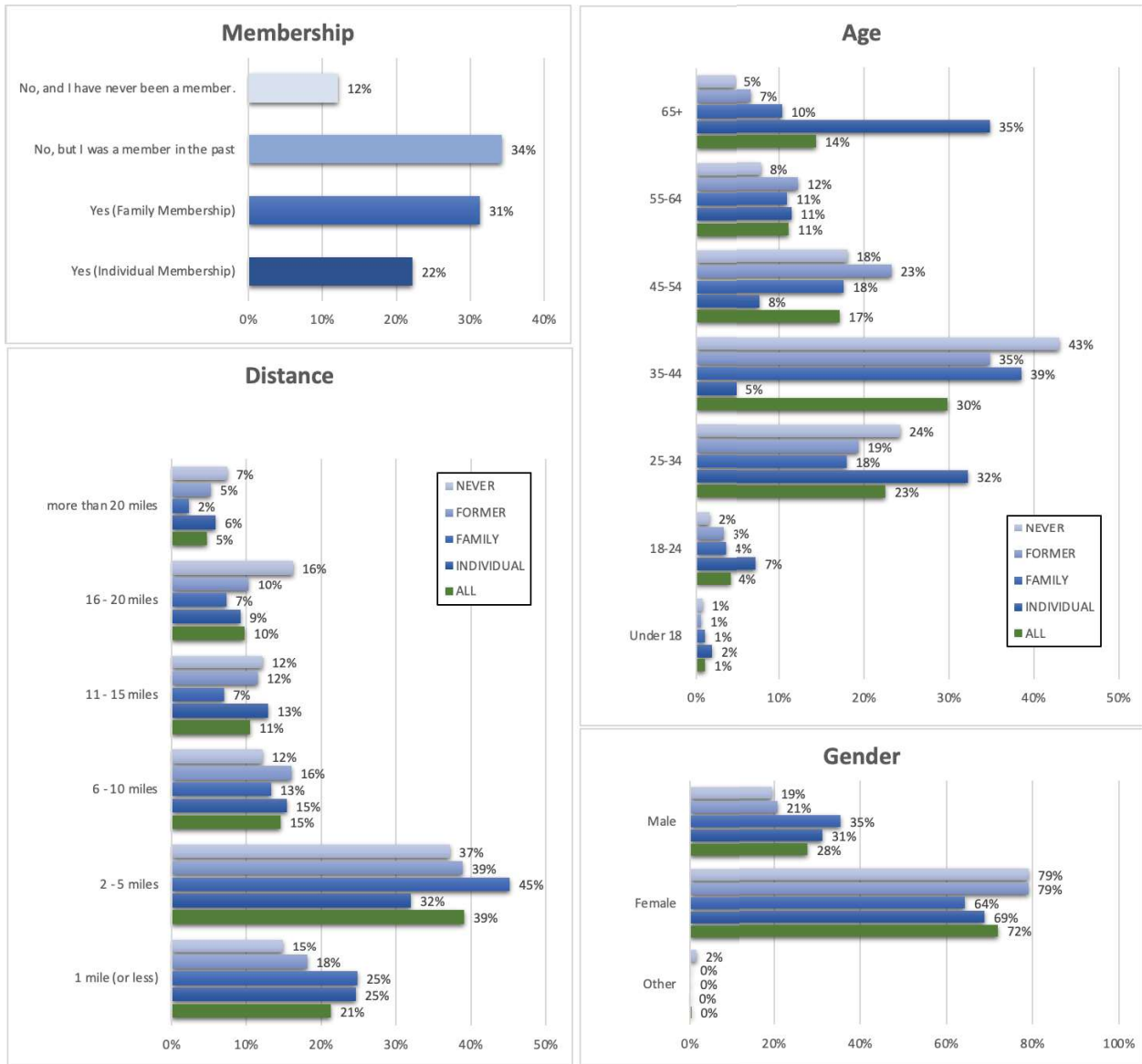


Figure 1: Membership and demographic characteristics of respondents to the survey.

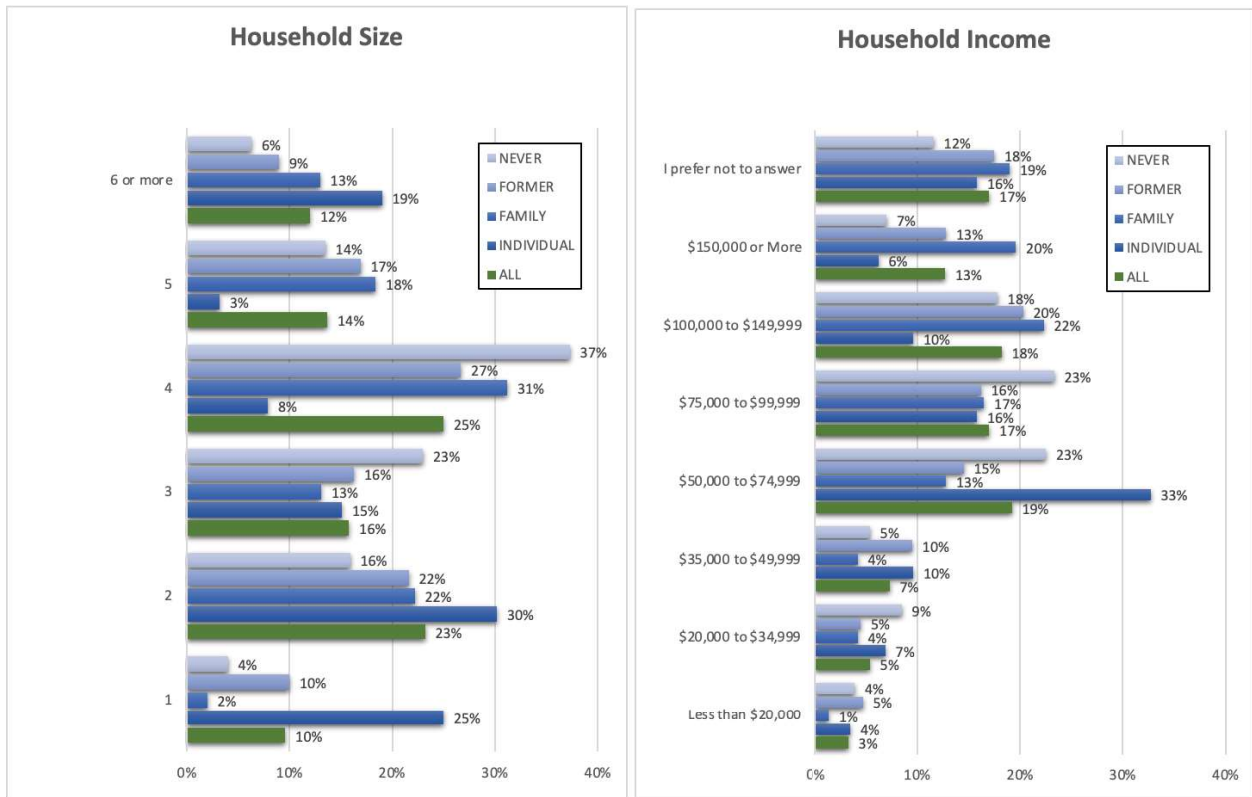


Figure 2: Household size and income distributions of respondents to the survey.

Option Ranking

Overall, the fitness center and aquatic center options were identified as higher priorities than the athletic center and community center option (Figure 3), although differences among all but the community center were slight. While 34 percent of respondents selected the aquatic center as their top choice, only 12 percent of respondents indicated that the community center as theirs. While the four membership groups tended to view the community center option similarly, other options mattered more to some groups than others (Figure 4). For example, individual members clearly placed a higher priority on fitness, while former and never members prioritized aquatics. Family members, were more diverse, as shown by roughly even distributions of rank evaluations across the fitness, aquatic and athletic center options.

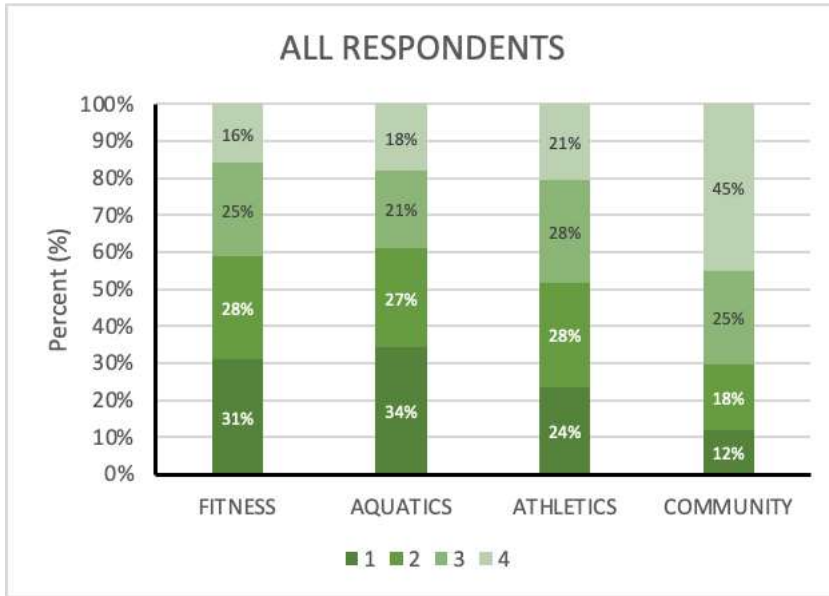


Figure 3: Overall distribution of rankings attributed to each of the four options. Darker bars signify higher priority.



Figure 4: Distribution of ranking broken down by four membership groups.

After ranking the four areas for potential improvement, respondents were then asked a series of questions focusing on each one in turn. To avoid biases associated with the order of presentation, each option was presented in random order.

For each option respondents were asked to rate their agreement with the following statements:

- I would be excited to use these enhanced facilities.
- Other people would be excited to use these enhanced facilities.
- These facilities would enhance the quality of life of area residents.
- These facilities would attract people to live and work in the area.

They were then asked to indicate the likelihood that they would contribute to a capital campaign to raise funds to make the proposed improvements a reality using a five-point scale (Very likely, Somewhat likely, As likely as not, Somewhat unlikely, Very unlikely).

The following pages present frequency distribution for responses to these questions, which were strikingly similar across the options and among the membership groups. Overwhelmingly, respondents were enthusiastically supportive of enhancing the facilities at the YMCA in Monroe with a majority of them agreeing that they or others would be excited to use the facilities, and that such improvements would improve the quality of life for area residents. Indeed, the majority of respondents strongly agreed with all four statements pertaining to enhancing the aquatic facilities (Figure 6). Most respondents also strongly agreed that others would be excited to use athletic (Figure 8) and fitness (Figure 10) facilities as well.

These positive attitudes carried over in respondents evaluations of their willingness to contribute to raising funds as well with a plurality of respondents indicating they were somewhat to very likely to contribute to an aquatic center (Figure 6), athletic center (Figure 8), or a fitness center (Figure 10).

Aquatic Center

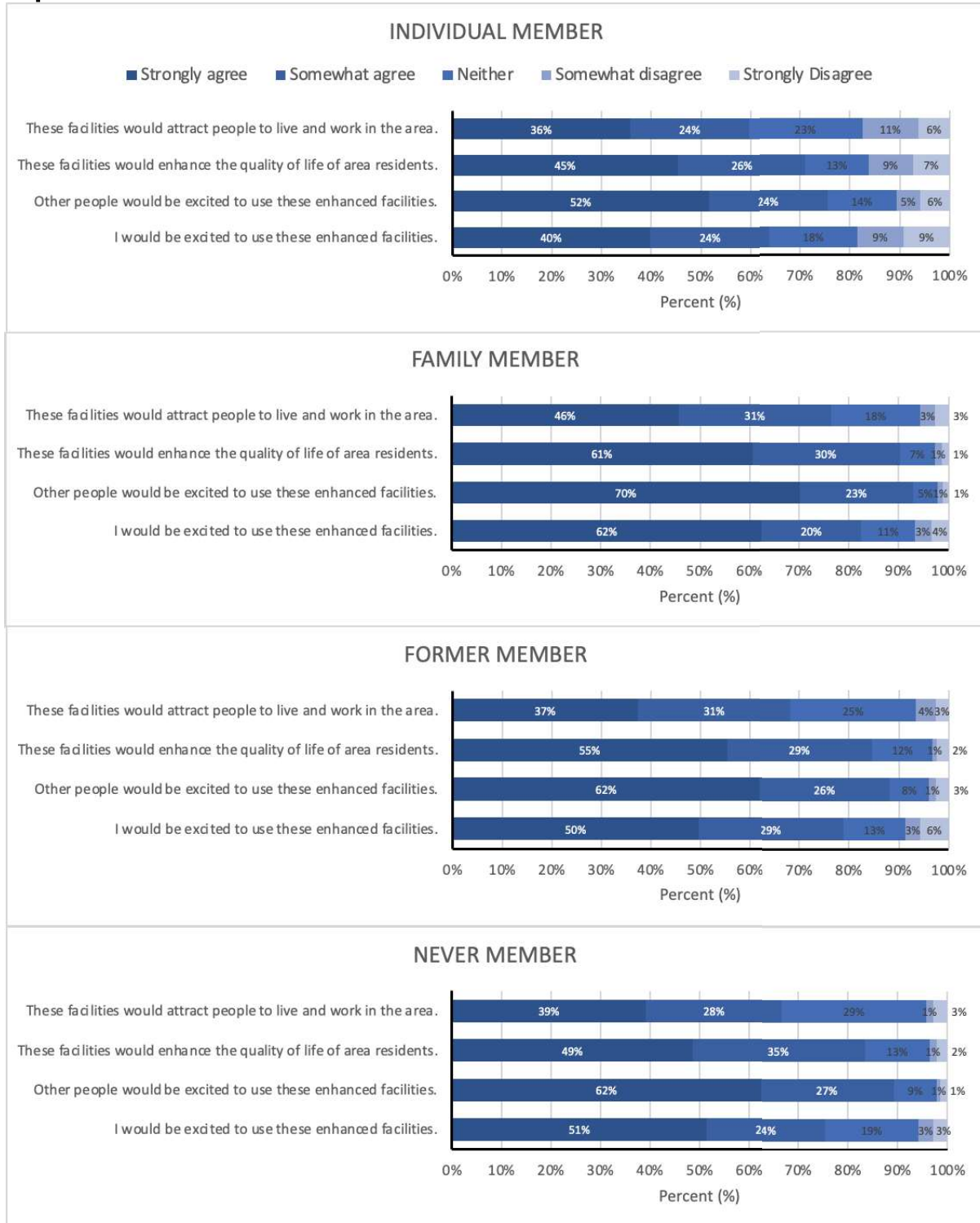


Figure 5: Indicators of support for improvements to Aquatic facilities among four member groups.

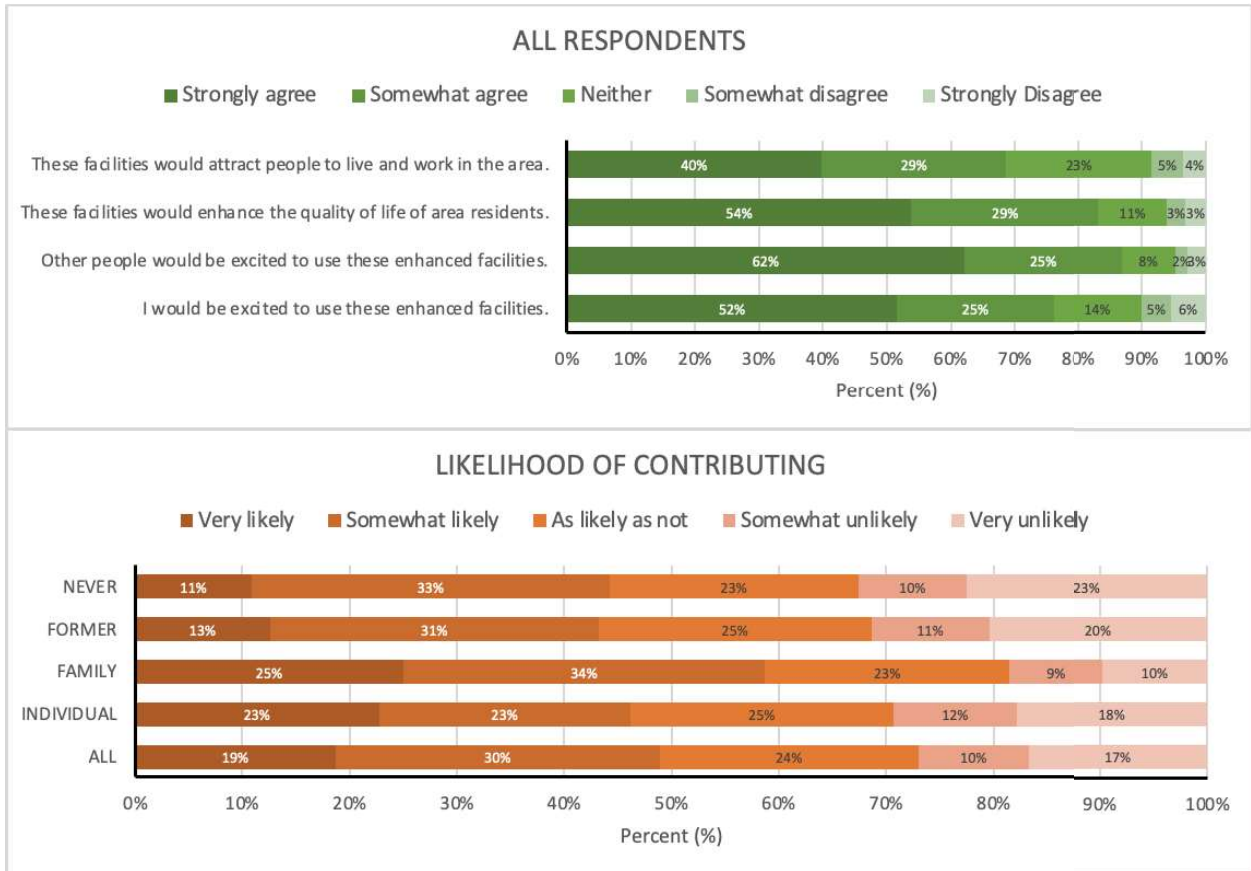


Figure 6: Indicators of support for improvements to Aquatic facilities and likelihood of contributing to a capital campaign for their construction. (All Respondents)

ATHLETIC CENTER

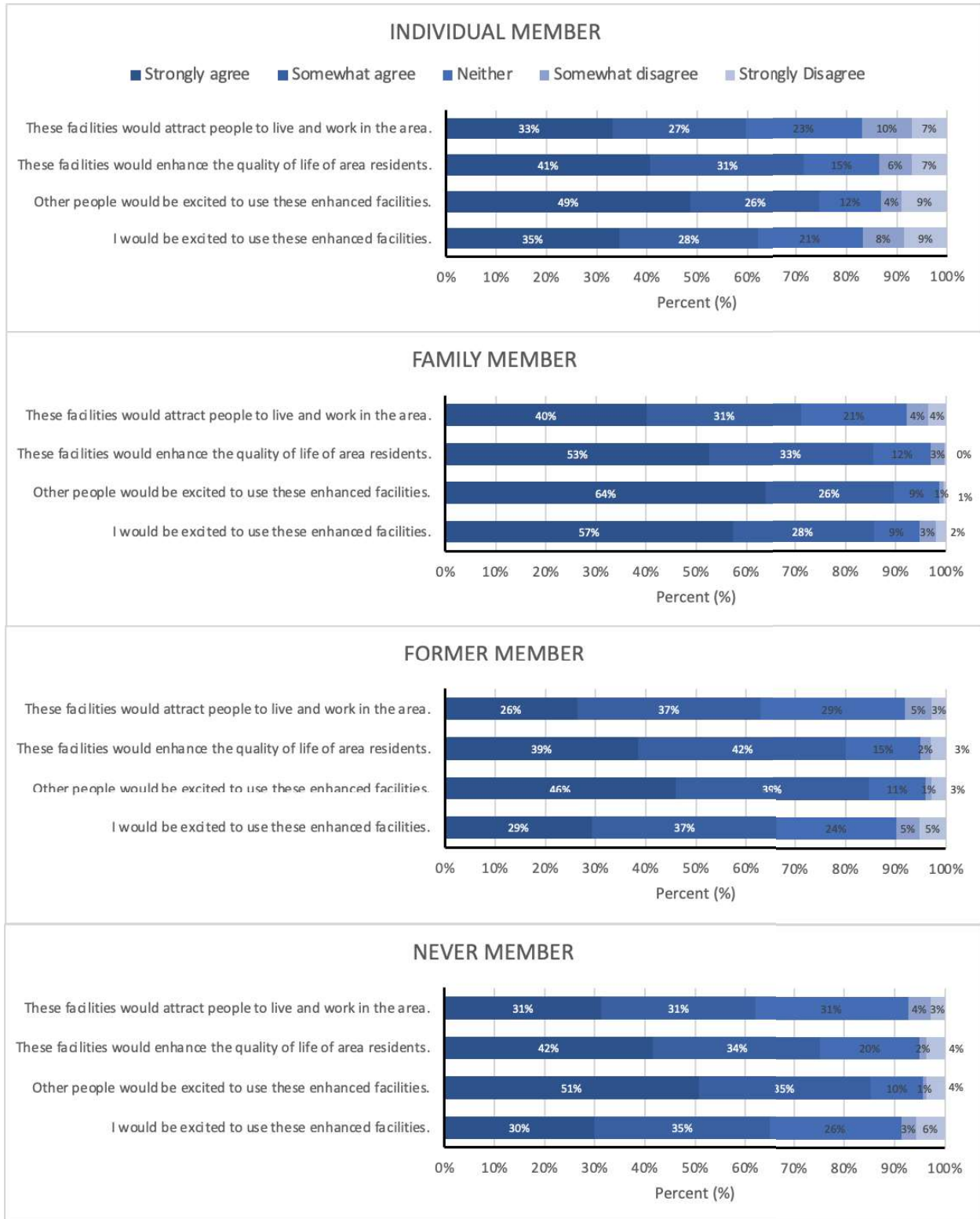


Figure 7: Indicators of support for improvements to Athletic facilities among four member groups.

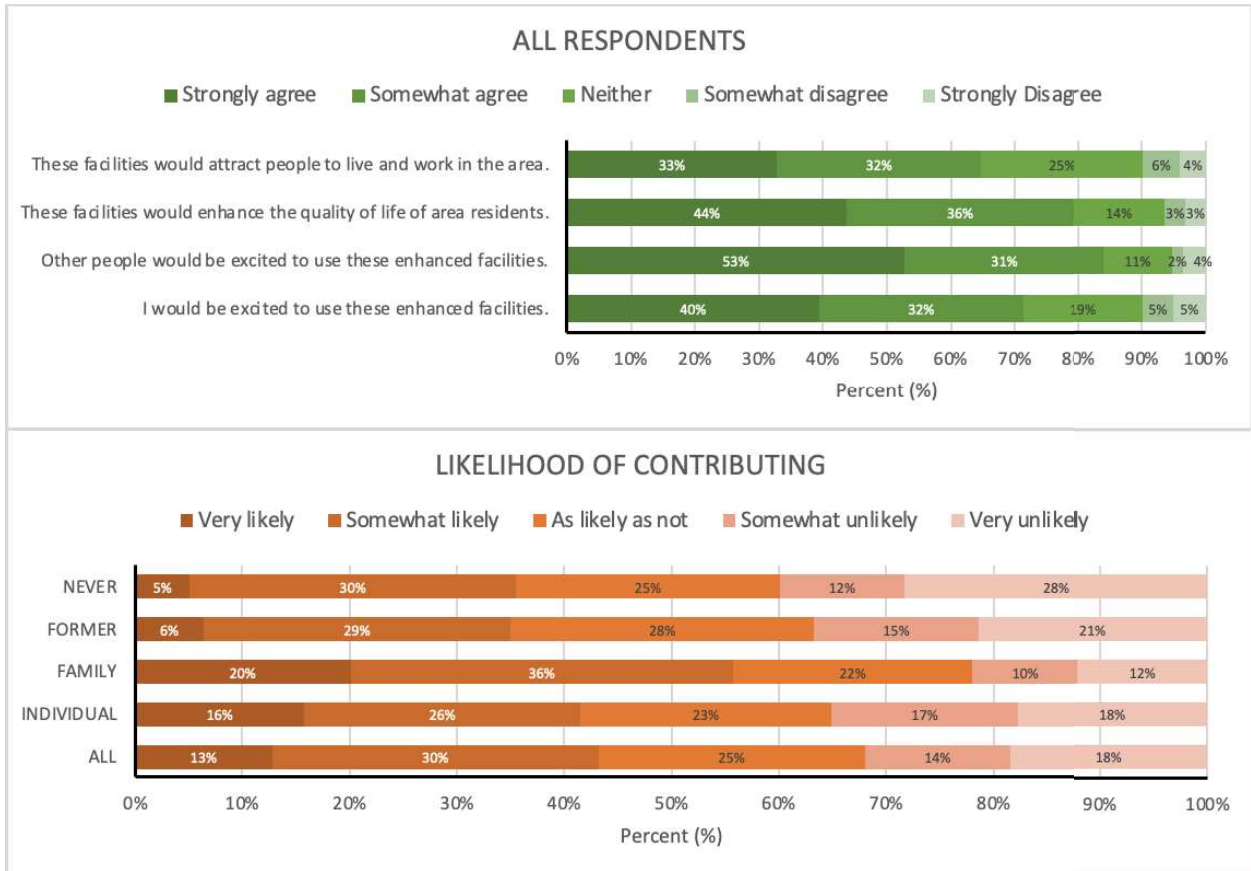


Figure 8: Indicators of support for improvements to Athletic facilities and likelihood of contributing to a capital campaign for their construction. (All Respondents)

Fitness Center

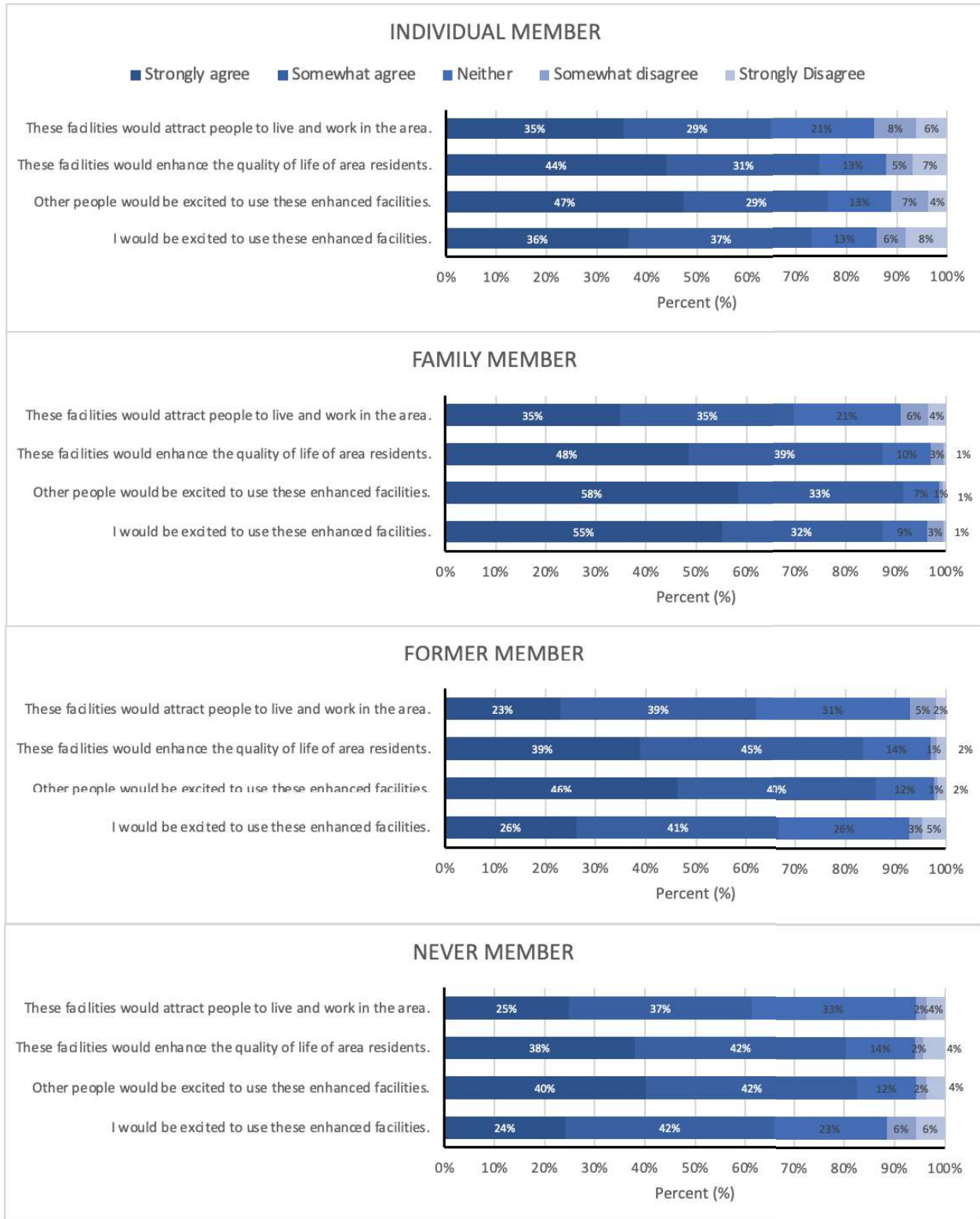


Figure 9: Indicators of support for improvements to Fitness facilities among four member groups.

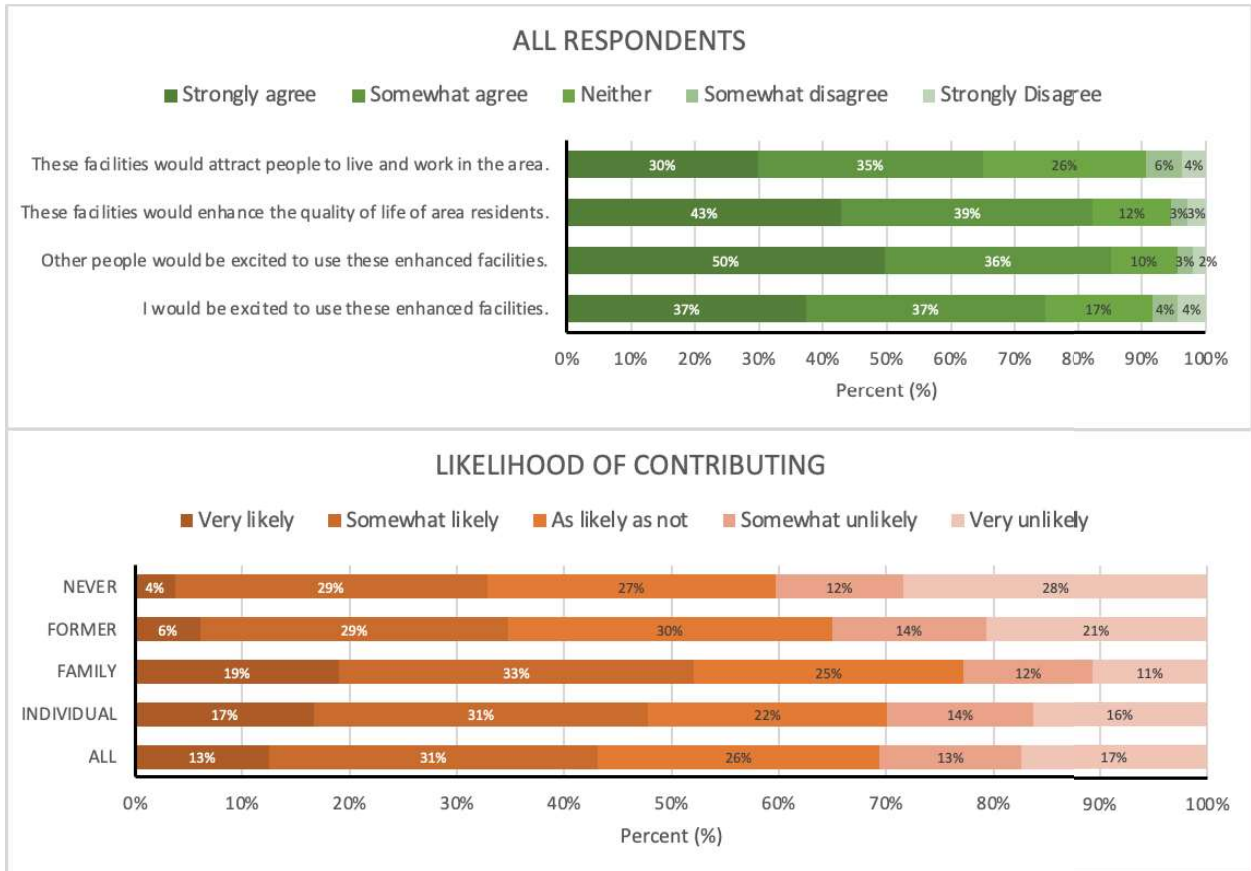


Figure 10: Indicators of support for improvements to Fitness facilities and likelihood of contributing to a capital campaign for their construction. (All Respondents)

Community Center

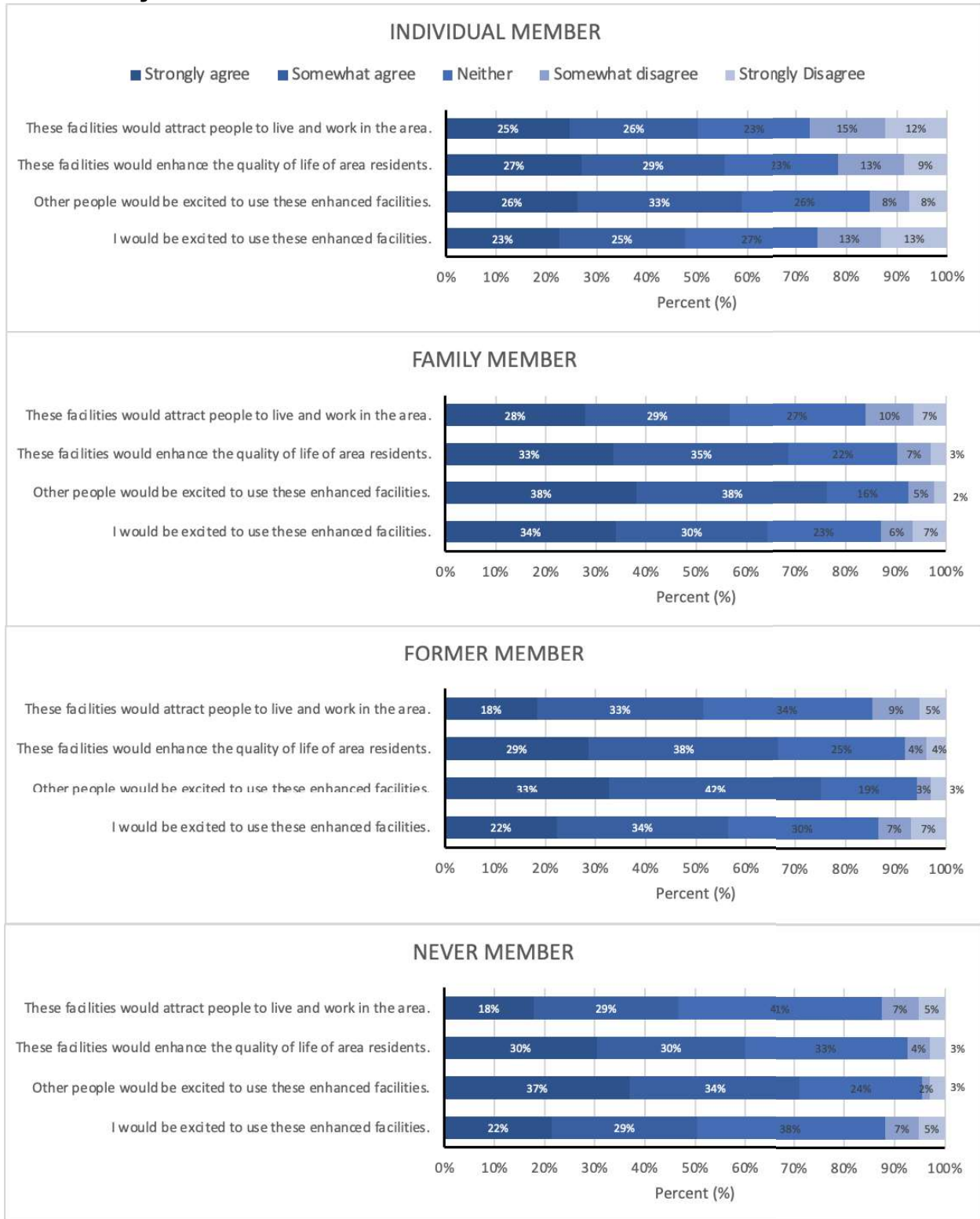


Figure 11: Indicators of support for improvements to Community facilities among four member groups.



Figure 12: Indicators of support for improvements to Community facilities and likelihood of contributing to a capital campaign for their construction. (All Respondents)

Likely effects of facility improvement on membership and revenue

To assess the potential for each area of improvement to impact revenue through sales of memberships, a series of questions asked respondents the likelihood of being a member both in the future without renovations (in one year and in five years) and with a given type of facility improvement (at current membership fees and if there were a 10 percent increase.)

Under the current facilities and across all respondents, average likelihood of being a member increased over time (Figure 13). While 54% of respondents indicated that they were currently a member of the YMCA, the average likelihood of being a member in one year was 63 percent, and in five years, 62 percent. These values reflect contrasting trends. For current members, the likelihood of retaining their membership in the future diminishes. This makes sense as uncertainty about the future imposes a non-zero chance that a current member will be unable to continue their membership. For those who are not currently members, the future presents a possibility of (re)joining the YMCA that compounds over time. Through these two trends, we can view the potential for each potential facility upgrade to impact membership retention and recruitment.

It is important to note, however, that the percent values expressed should not be interpreted literally, because they reflect respondent’s behavioral intention rather than actual behavior. Given the timing of the survey around the New Year (when resolutions to get fit tend to run high), these results are bound to be optimistic. That said, the value of these projections is as a basis for comparison to estimate the effect of potential directions in which to focus upgrades to the facilities.

Relative to membership projections under the current facilities on the whole, most of the facility upgrades explored in the survey were associated with an increase in members, particularly if the fees remained at current levels. The exception to these trends was the Community Center focus, for which there was no statistically significant difference in membership probability compared to the status quo (Figure 13).

When a hypothetical ten percent increase in membership fees was imposed, the average likelihood of being a member, as expected, decreased relative to the same scenarios without a fee increase (Figure 13). Of note, however, is that the average likelihood for the Aquatic and Fitness Centers under a fee increase was not statistically significantly different from that of the status quo, suggesting that these improvements would each bring approximately ten percent more value to members.

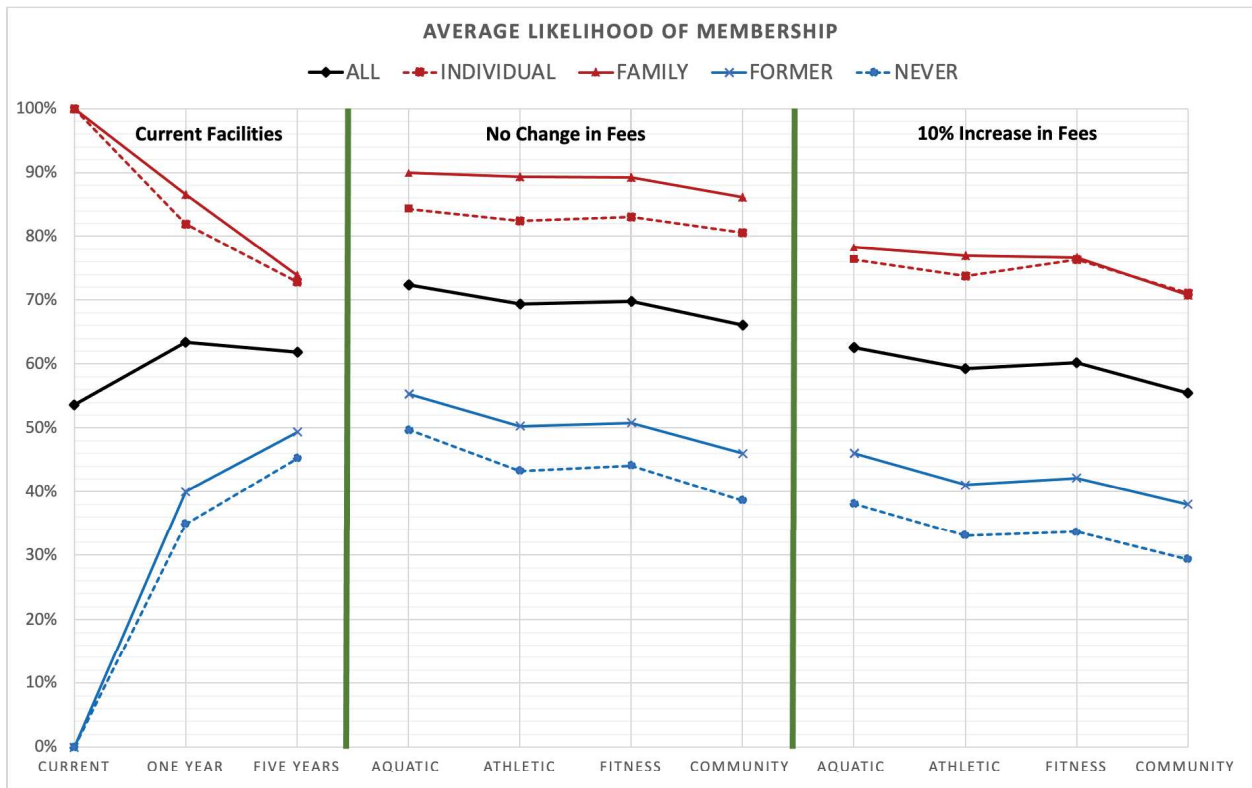


Figure 13: Average likelihood of being a member of the Green County Family YMCA under alternative scenarios.

To better reflect the expected change in membership numbers compared to the status quo, Figure 14 presents average likelihood for each scenario relative to that in five years without undergoing

any facility improvements. For example, if the average 5yr likelihood is 62 percent and the average likelihood of membership with an Aquatic Center and not change in fees is 72 percent, this constitutes a 17% increase ($72 \div 62 = 1.17$). From this figure, one can see that - at current fee levels - all improvements have a strong retention effect on current members, but that the aquatic center has the greatest potential impact on recruitment of new members. Increasing the fees by ten percent, however, serves to dampen the potential gains in membership, leading non-members in particular to be less likely to join than expected in five years with the current facilities and prices.

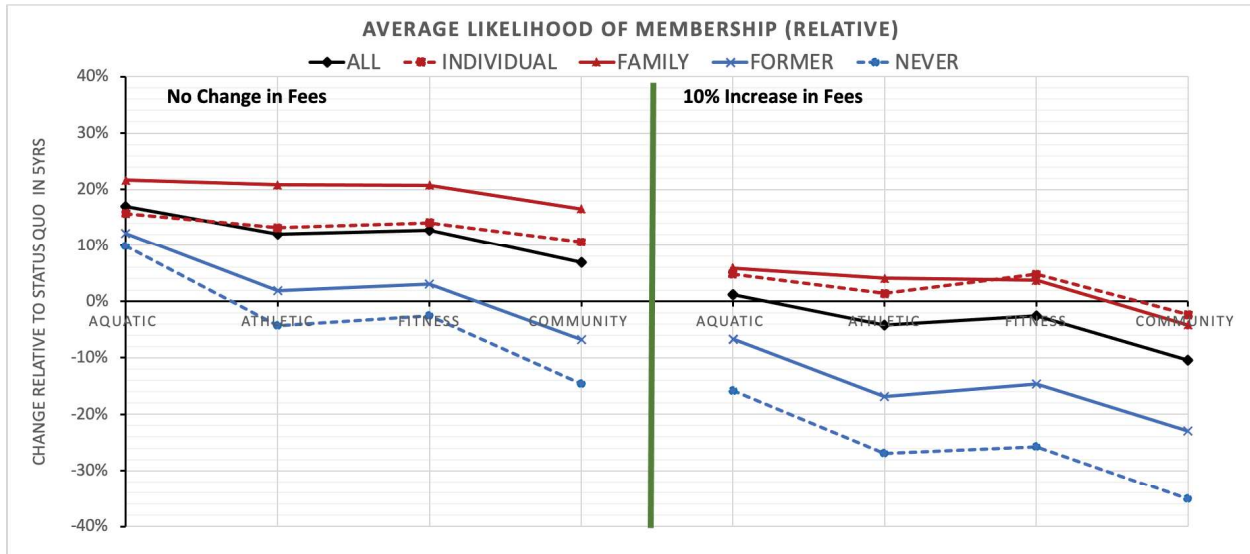


Figure 14: Relative likelihood of being a member of the Green County Family YMCA compared to the status quo in five years.

The relationship between price increase and demand for a good or service is termed by economists, *elasticity of demand*, and is calculated as the percent change in price divided by the percent change in demand. A value less than one indicates that demand is *inelastic*, i.e., that total revenue will fall if prices are raised. Value greater than one is *super elastic*, meaning that money gained by raising prices more than offsets the loss of customers. As shown by Table 2, for most membership groups, demand for the proposed improvements to facilities are inelastic, meaning that revenue gains would be maximized not by raising prices but by increasing membership. One exception to this trend is for individual members for whom all proposed improvements except the community center are near elastic goods. In other words, they would be willing to pay more for better facilities.

Table 2: Elasticity of demand (percent change in price/percent change in membership).

	ALL	INDIVIDUAL	FAMILY	FORMER	NEVER
AQUATIC CENTER	0.74	1.06	0.77	0.59	0.43
ATHLETIC CENTER	0.69	0.96	0.72	0.54	0.42
FITNESS CENTER	0.73	1.22	0.71	0.58	0.42
COMMUNITY CENTER	0.62	0.85	0.56	0.58	0.42