



Marketplace Intelligence

Consumer Research: Community and Member Reaction to a Re-Imagined Owensboro Family YMCA

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Prepared for:

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Objectives

This research provides unbiased data and experienced analysis to the Owensboro Family YMCA, and any potential partners, regarding the scope of opportunities and challenges for the growth, improvement and better sustainability of YMCA facilities and programs in Daviess County. Specifically, this research estimates membership demand (in member units) and price elasticity for the Y at proposed new/renovated facilities at multiple locations within the local area including the current site of the YMCA.

The following information was gathered and analyzed:

- An assessment, on an unaided and aided basis, of community needs and wants in terms of healthy living, recreation, sports, and related social service programs that can be offered by the YMCA.
- The relative demand and desire for specific facilities, programs (yoga, Pilates, functional training, and weight loss, etc.) and areas of focus (parent/child, youth development, disease/injury prevention and recovery, etc.) from this YMCA, and a rank ordering of the extent to which each will/will not contribute to growth in membership/usage.
- Determination as to whether Owensboro and the surrounding communities can generate sufficient membership to sustain a vibrant YMCA.
- Projected price elasticity of demand for a new or re-imagined Owensboro Family YMCA. That is, what impact will cost have on membership/usage and what is the optimal monthly cost for membership.
- Based upon a proven model and the primary data collected in this research, the number of member units/usage a YMCA facility can anticipate in Owensboro based upon potential specific offerings.
- The perceived convenience of multiple new locations versus the current site of the YMCA.
- Evaluation of the current level of awareness, image, and personal relevance of the Y and the Y mission within the City of Owensboro and Daviess County Region.

PB&A believes, by completing this research carefully, the resulting data is of great value to the YMCA and the residents of the City of Owensboro and Daviess County regardless of whether or not the ultimate decision is to move forward with the renovation of the existing Y or the construction of a new YMCA.

Study Approach

This research was completed as follows:

Phase One: A review of secondary demographic and psychographic information including data from the City of Owensboro, Daviess County, Y-USA and SDR, among others.

Phase Two: Two online focus groups and a series of one-on-one, in-depth interviews with formal and informal community leaders.

Phase Three: Four hundred (400) in-depth, interviews with a random sample of area residents who live within the estimated primary market area of the existing or any proposed new YMCA.

For Phase Three, three types of data collection were blended to provide as balanced and unbiased a sample and results as possible. Doing this type of sampling, correctly, is difficult and essential to accurate data. PB&A has successfully implemented an ever-improving sampling methodology on more than 300 YMCA research projects.

First, PB&A generated a random, household telephone sample. The calling plan was designed in such a manner that every telephone household, regardless of whether or not a number is listed, had an equal probability of being included in the study.

PB&A attempted five callbacks before replacing a household selected for inclusion in the sample with another home. All interviewing was completed in August and September of 2020 on weekday evenings between the hours of 5PM and 8PM, as well as during the daytime on one weekend. PB&A utilized a multilingual and multi-cultural interviewing team and as such, within reason, respondents were able to participate in their language of first choice.

PB&A overlaid an electronic survey (email and cellphone) to capture an adequate share of residents who rely only on their mobile devices versus a land line telephone.

PB&A, to the extent possible, completed interviews with area residents similar to the overall demographic profile of the region. During analysis, PB&A weighted the data to assure that results and membership projections are based upon information that directly matches the psycho-demographic profile of the Owensboro area.

The overall error range for this phase is $\pm 5.0\%$ at the 95% confidence level.

Phase Four: Completion of 244 online interviews with members of the Owensboro Family YMCA. These member surveys are in addition to the area resident interviews in Phase Three. These interviews assist in understanding consumer wants and needs at a new or improved YMCA in Owensboro and also provide guidance as to how to enhance the current member experience at the existing facility and any other community based programming before the new or renovated Y opens.

PB&A sent an email invitation to every Y member that has provided an accurate email address to the Y, and 244 chose to participate.

Phase Five: Completion of 143 online interviews with individuals who terminated their YMCA membership within the past 20 months. PB&A was provided with an email database of lapsed members by the Owensboro Family YMCA. An email invitation to participate in a brief study was sent to every active address given to us. Of these, 143 lapsed members chose to respond.

This portion of the research was designed as a tool to encourage listening to the wants and needs of members on an individualized basis and to help the Owensboro Family YMCA re-sign those who may have an interest in coming back to the Y.

A link to an interactive online dashboard has been provided to YMCA management with the data from these interviews. Results are presented in aggregate and then on a respondent by respondent level. Those past members with an interest in re-joining the Y provided their name and contact information. The Y should use this by following up with these people, ready to respond intelligently to their concerns.

The collective findings from this brief survey are presented within the Executive Summary of this written report.

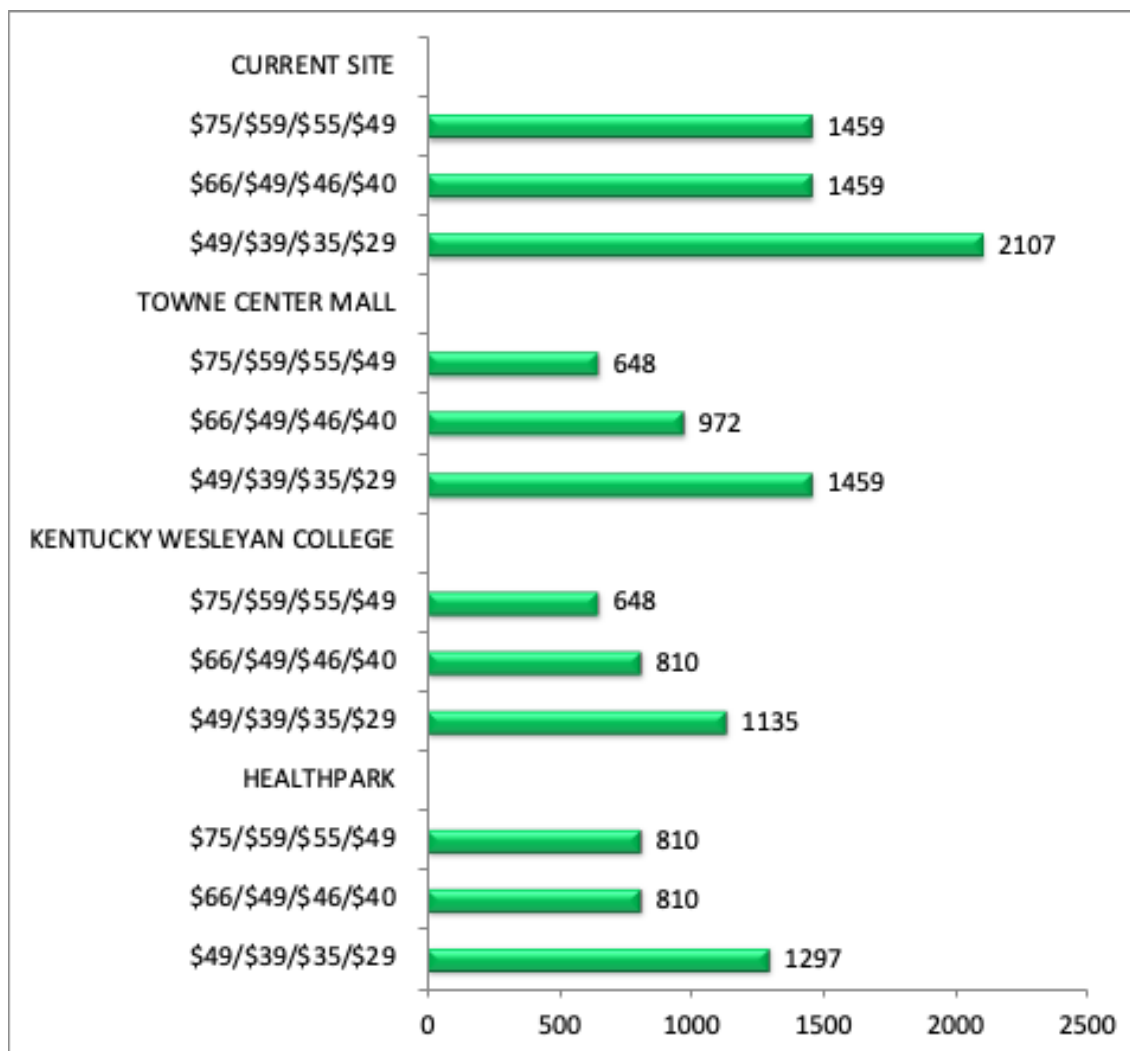
Executive Summary

The findings and conclusions presented here are based upon this research and the experience of PB&A Marketplace Intelligence.

Area Residents

- The Owensboro Family YMCA is seen as a key community asset by local residents (75%), and the mission and offerings are important to the quality of life within the City of Owensboro and throughout Daviess County.
- Six out of ten (59%) of area residents, who are not Y members, believe that, if the Owensboro Family YMCA were to close, many people in the community would not be able to find programs and services they need.
- This YMCA has an opportunity to serve significantly more area residents than it does today and it was doing prior to the Covid-19 pandemic. To meet its potential will require a new or re-imagined YMCA facility.
- Overwhelmingly (81%), area residents believe that City of Owensboro and Daviess County deserve a better YMCA than the existing facility.
- Of the four sites tested, renovating and expanding at the current site, versus opening a new facility elsewhere, is likely to draw the greatest number of additional members. However, all four sites show opportunity for membership growth potential.
- The Owensboro Family YMCA should consider changing their membership fee structure. Lowering monthly fees appears likely to produce an increase in demand for new membership.
- The chart on the following page displays the estimated number of full pay member units a new or re-imagined YMCA is likely to attract at three monthly price points for four different locations. The number of member units (households) indicated, is a conservative estimate and includes only those new to the YMCA, not current members or families/individuals who are offered membership at reduced fees based upon their annual household income or any other reason.
- These projections assume that there is no joining fee. If a joining fee is charged, it will likely cause significantly fewer new members to join than what is estimated in this report. This warning should not be ignored.
- The Owensboro Family YMCA needs to use these results to perform a full financial analysis before making any decisions to renovate or to build a new YMCA.

Price Elasticity of Demand Additional Full Pay Members Units – Year One



Base: Total area resident sample (400).

- It appears that the idea of joint programming and management of a new YMCA with Kentucky Wesleyan College will not have an immediate positive impact in terms of motivating additional interest in joining the YMCA. Either residents do not necessarily like the idea of sharing a Y with college students or they do not intuitively understand the advantages to having the new Y on campus.
- If this concept for a new Y is to move forward, management will need to continually emphasize the reasons why this partnership makes sense and clearly communicate the consumer benefits of having the Y on campus.

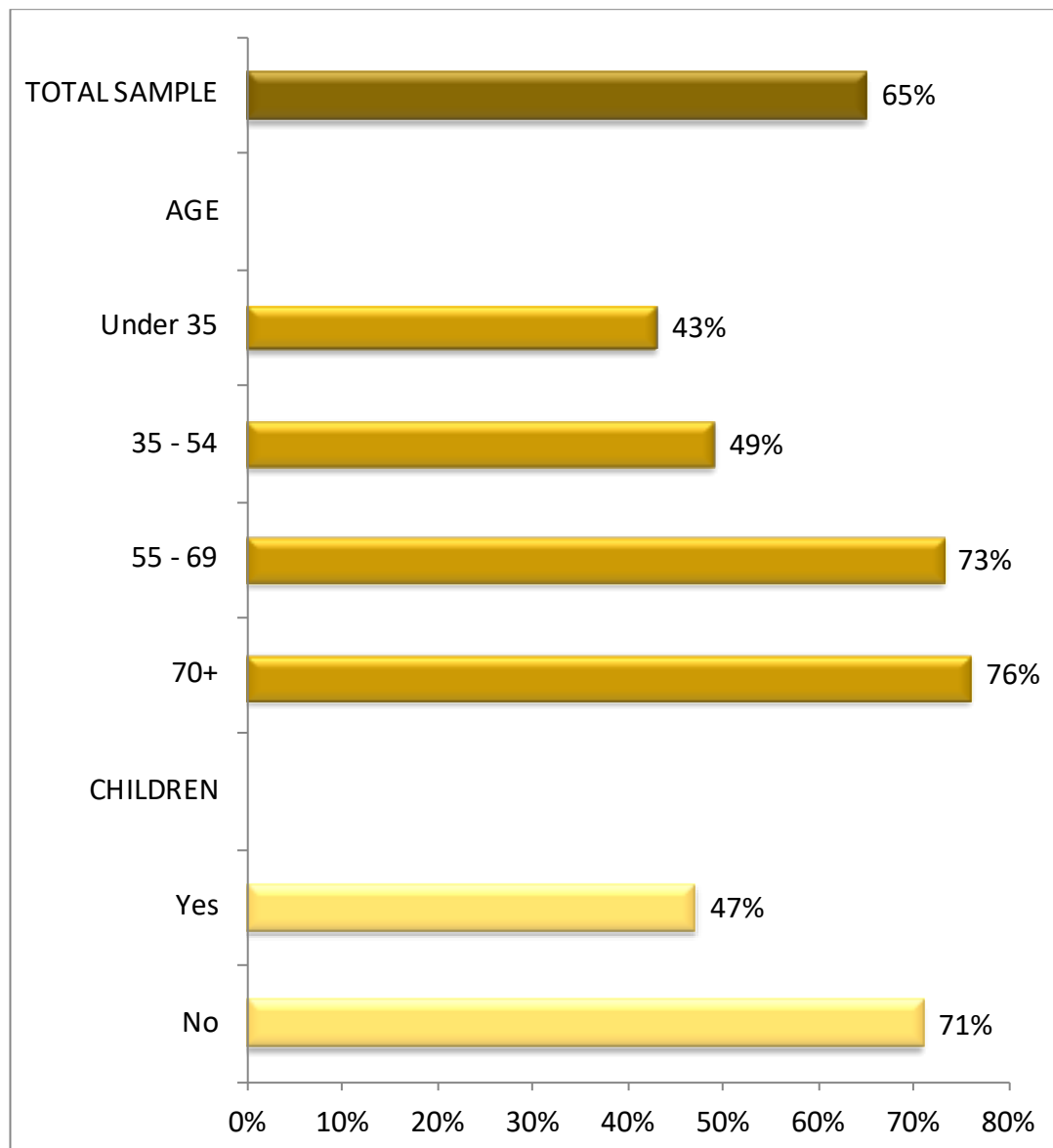
- Area residents do not perceive any positive motivation to join the new Y at Towne Square Mall because the YMCA may be surrounded by other not-for-profit organizations.
- The idea of a closer partnership, including the potential of shared facilities, with Healthpark will motivate additional area residents to join the Owensboro Family YMCA.
- Of 14 major Y facilities and programs tested, those most likely to attract usage from area residents who currently are not Y members, at a new or renovated Y in Owensboro are:
 - Indoor, multi-purpose pool (56%).
 - Indoor, walking/running track (47%).
 - State-of-the-art fitness center (31%).
 - Programs and facilities to help prevent or recover from illness or injury (25%).
 - A social area within the Y for meeting friends and relaxing before and after class (25%).
 - A free weight room (24%).
- Of 24 additional programs tested, those that draw the greatest level of interest from area residents are:
 - Water-based exercise.
 - Lap swimming.
 - Programs that help students succeed in school.
 - Health and wellness education.
 - Indoor cycling.
- Although neither before/after school childcare or infant/toddler care are necessarily of interest to as many local residents as are other offerings considered in this question, the fact that (10% - 11%) of all area residents express interest in childcare at the YMCA represents a meaningful number of households.

YMCA Members

- Nine out of ten (92%) Y members claim to be either “very” (48%) or “somewhat” (44%) satisfied with their membership. While this appears to be a very positive rating, good/great Ys across the country will have a significantly higher percentage of members who claim to be very satisfied.
- The primary reason many Y members are less than very satisfied is the age and condition of the facility.

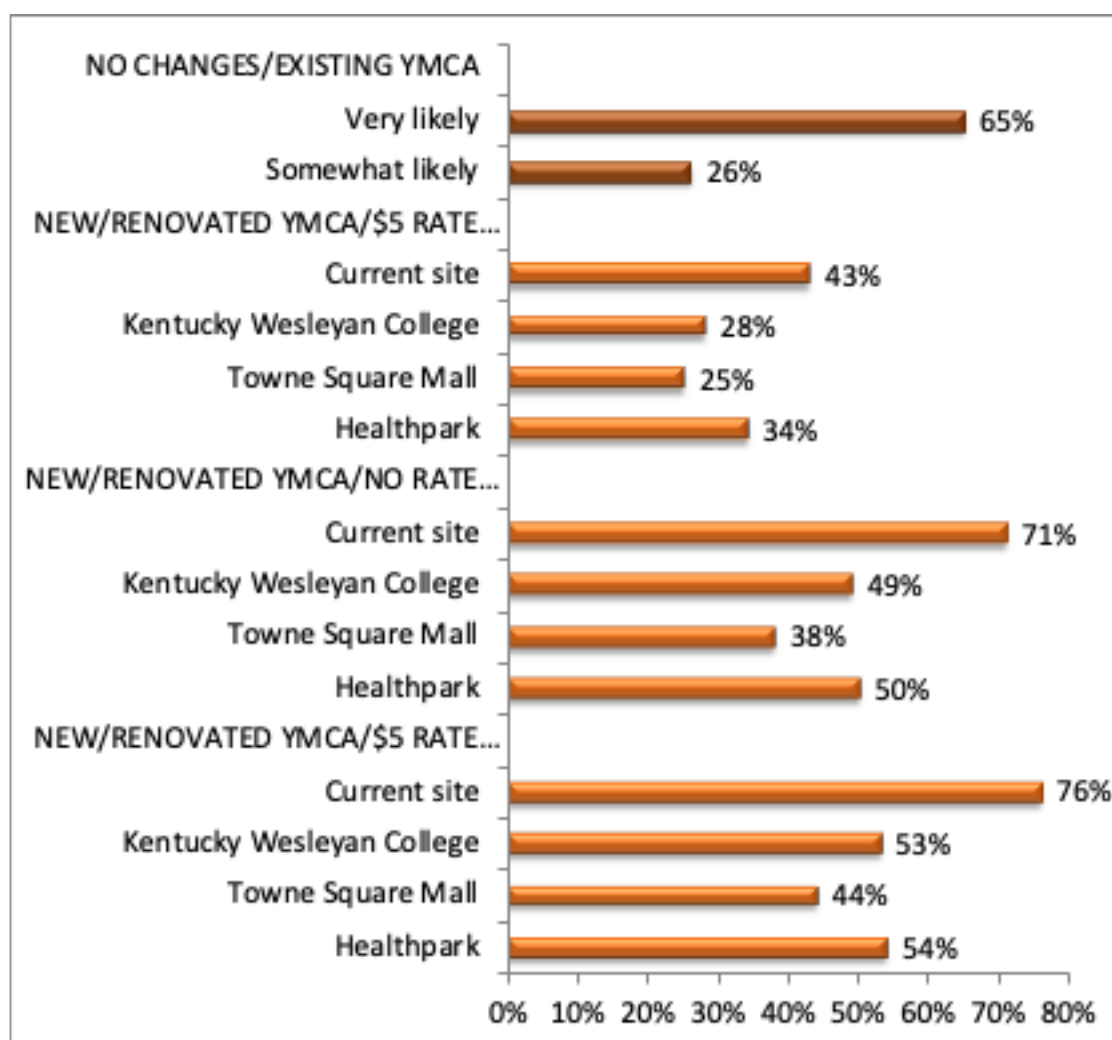
- At present, with no changes to the facilities or programming, 65% of Owensboro Family YMCA members claim to be very likely to remain Y members for at least the next 12 months. An additional 26% are somewhat likely to remain Y members.
- Silver Sneakers (75%) are significantly more inclined to be very likely to remain members than are either household (56%) or individual (59%) members.
- The Owensboro Family YMCA is most susceptible to membership loss among those under the age of 55. These are the same members least likely to be very satisfied, most likely to have unmet needs and also are not Silver Sneakers.

***Likelihood of Remaining a YMCA Member
% Very Likely***



- In general, it can be concluded that members want a new or improved YMCA, but do not want to pay more per month than what they are currently charged for their membership.
- The data also shows that members are most comfortable with the idea of a renovated Y at the current location. That is, more members claim they will remain members if the current site is renovated versus a new building or build out (Towne Square Mall) elsewhere.
- Of the sites being considered, Towne Square Mall is of least interest to current members. That is, regardless of price, fewer members claim they will remain with the Y if it moves to Towne Square Mall than at any of the other potential locations.

Likelihood of Remaining a Member



Lapsed Members

- Of the lapsed members participating in this survey, 46% claim that they left the Y and joined some other health club or wellness facility. This leaves 54% who did not join somewhere else.
- Of those who joined elsewhere, 98% claim to be either very (60%) or somewhat (38%) satisfied with their new membership. This satisfaction level is more positive than is the satisfaction rate of current Y members with their Y membership (92% overall: 48% very satisfied plus 44% somewhat satisfied). Of concern is the difference between the 60% very satisfied elsewhere versus 48% very satisfied among remaining Y members.
- The most popular establishment among lapsed Y members to join is Iron Jungle (32%) followed by Planet Fitness (14%), Healthpark (14%) and The Edge (7%).
- The most common reason for choosing to discontinue Y membership is the closure of the Athenian facility (26%). Other frequent reasons include the perception of poor maintenance/cleanliness at the Y (10%), Covid-19 (10%), the cost/value of membership (8%) and issues concerning the pool most often expressed as poor maintenance and frequent/prolonged closures (9%). These responses were to an open-ended question and as such lapsed members volunteered these reasons without being prompted in any manner.
- When asked, on an unaided basis, what if anything the Y should have or could have done to keep the member from leaving, the most common answer is “nothing” (38%). Also volunteered frequently are; lower cost (12%), not closing the Athenian (9%), and better maintenance and cleanliness (8%).
- In the cost category, 3 respondents mentioned the desire for a family membership with lower rates. This would suggest some type of problem with how family versus individual membership rates are presented.

- One out of ten (10%) of lapsed members would like to be contacted by the Owensboro Family YMCA regarding re-joining the Y. The individual surveys completed by these potential members are available within the online, interactive report. These past members should be contacted as soon as possible.

Detailed Findings: City of Owensboro and Daviess County Area Residents

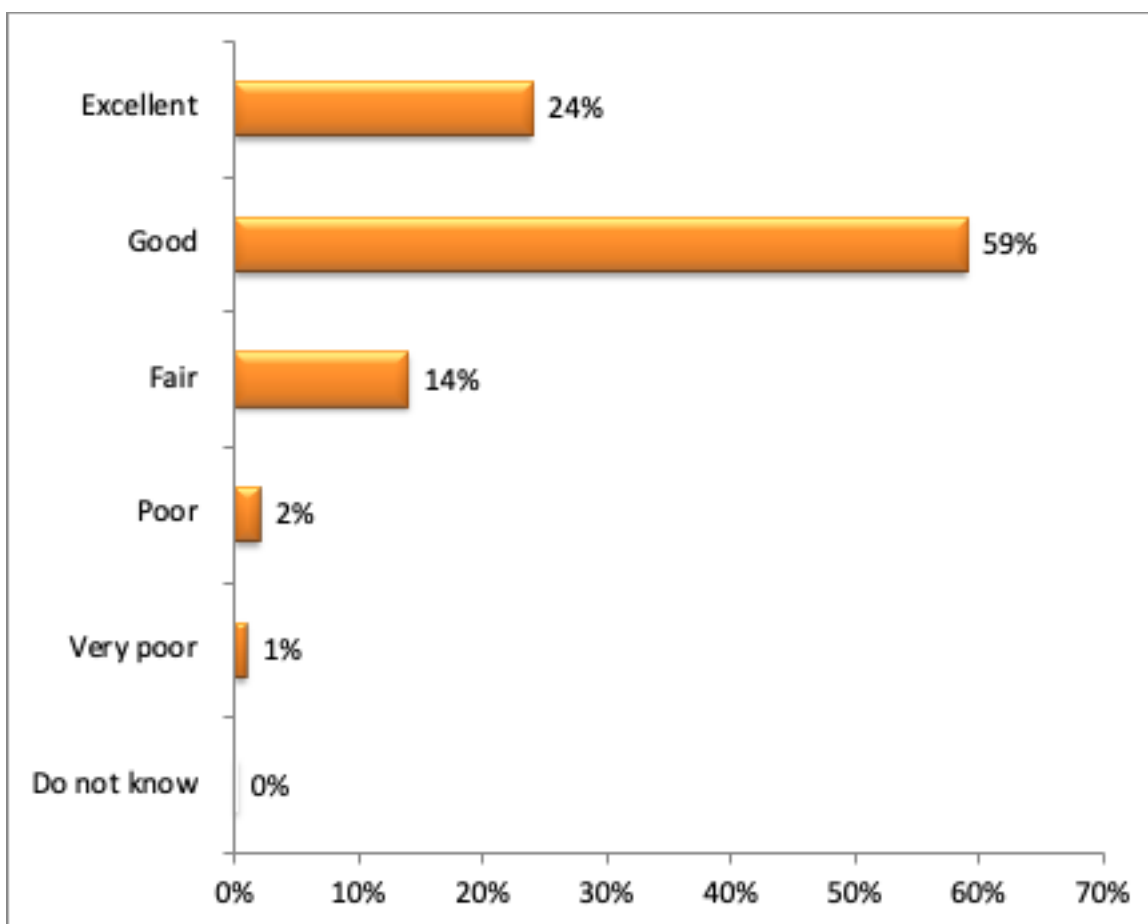
I. Owensboro: Pre-Covid-19 Pandemic

This portion of the report is based upon 400 complete interviews with residents of the City of Owensboro and Daviess County who are not members of the Owensboro Family YMCA.

The first question asked of area residents was to rate the quality of life in Owensboro and Daviess County, prior to the Covid-19 pandemic. This rating was completed on a 5 point scale, where 5 = excellent and 1 = very poor.

- On average, local residents rate Owensboro in “normal times” as a good, but not necessarily an excellent, place to live (4.02 mean rating).

Rating of Owensboro as a Place to Live: Pre-Covid-19



Mean rating: 4.02

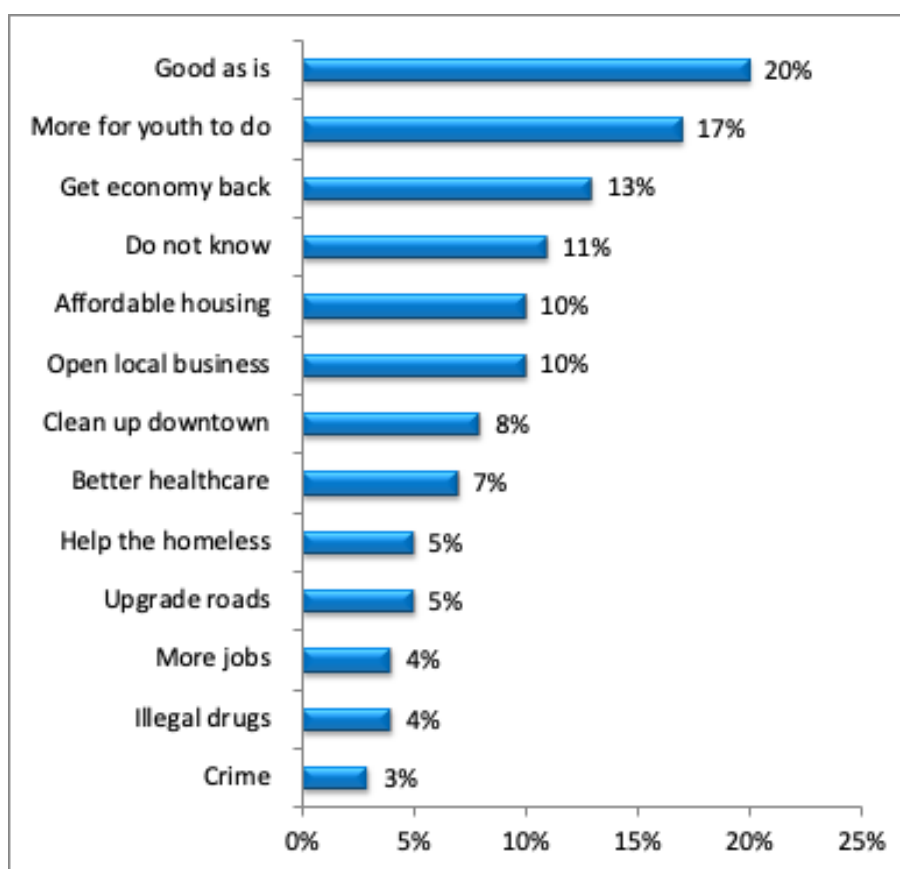
Base: Total area resident sample (400).

Question: Prior to the Covid-19 pandemic would you say Owensboro was a **[READ SCALE]** place to live?

Next, residents were asked to indicate, in their own words, what change or improvement would make Owensboro a better place to live.

- The most common answer to this question does not offer insight into desired community improvements, but rather that Owensboro is a good place to live “as it is”.
- The second most frequent response is the need for better and more positive places/activities for youth. **The level of unaided attention to lack of youth programming is significantly higher in this research than what PB&A typically sees in communities across the country. Positive youth development is a cornerstone of the YMCA mission.**
- Also mentioned often is the need for business and the local economy to “re-open” and the necessity for more affordable housing. Thus, even though the question focused on life in Owensboro pre-Covid-19, many resident still made comments about current circumstances and the impact of the pandemic.

***Rating of Owensboro as a Place to Live:
Pre-Covid-19***



Base: Total area resident sample (400).

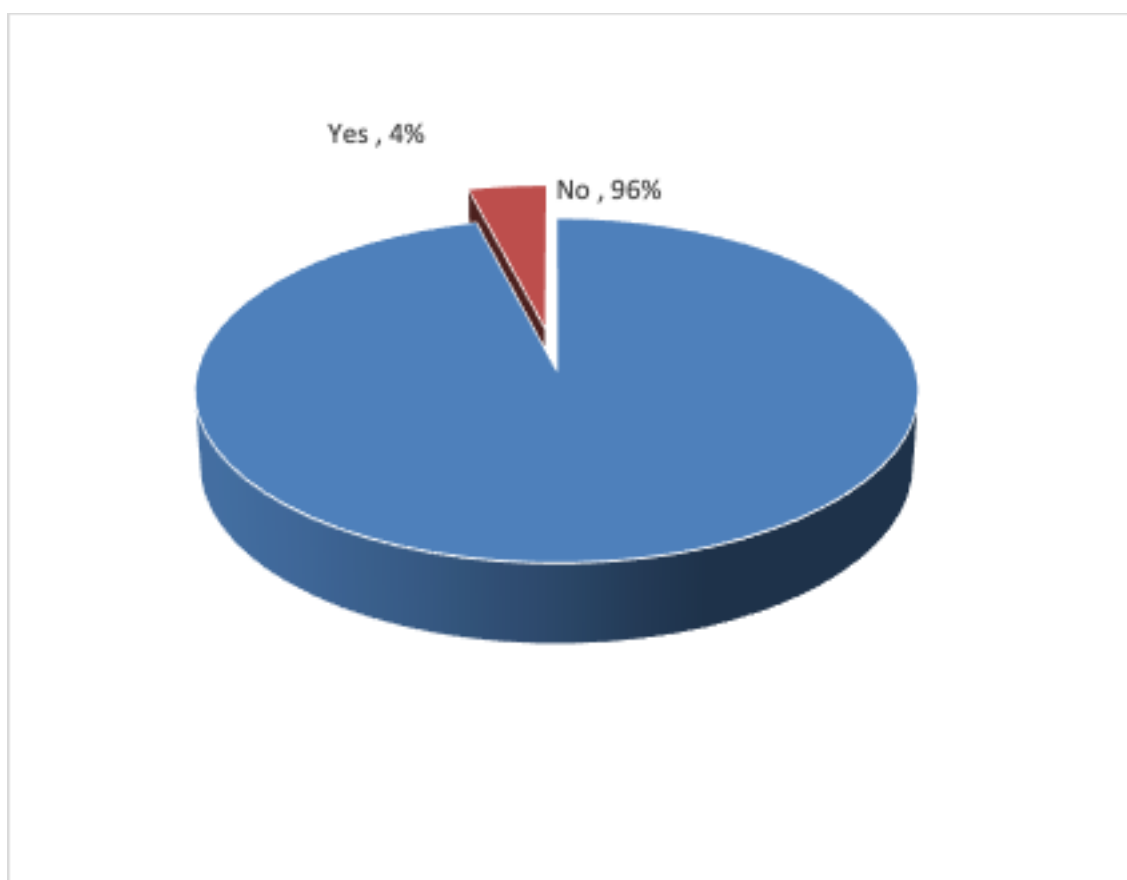
Question: What one change or improvement would make Owensboro a better place to live?

Chart includes responses mentioned by more than 2% of the sample.

II. Health Club/Recreation Center Membership

- Only 4% of area residents who do not belong to the YMCA claim to be members at some type of health club or recreation center. This percentage of area residents, attempting to satisfy their healthy living needs somewhere other than the YMCA, is significantly lower than what PB&A typically sees in many other cities and towns across the United States.
- However, this measure is likely colored by the ongoing Covid-19 crisis and thus the percentage recorded may be lower than would be true in normal times.

Health Club/Recreation Center Membership

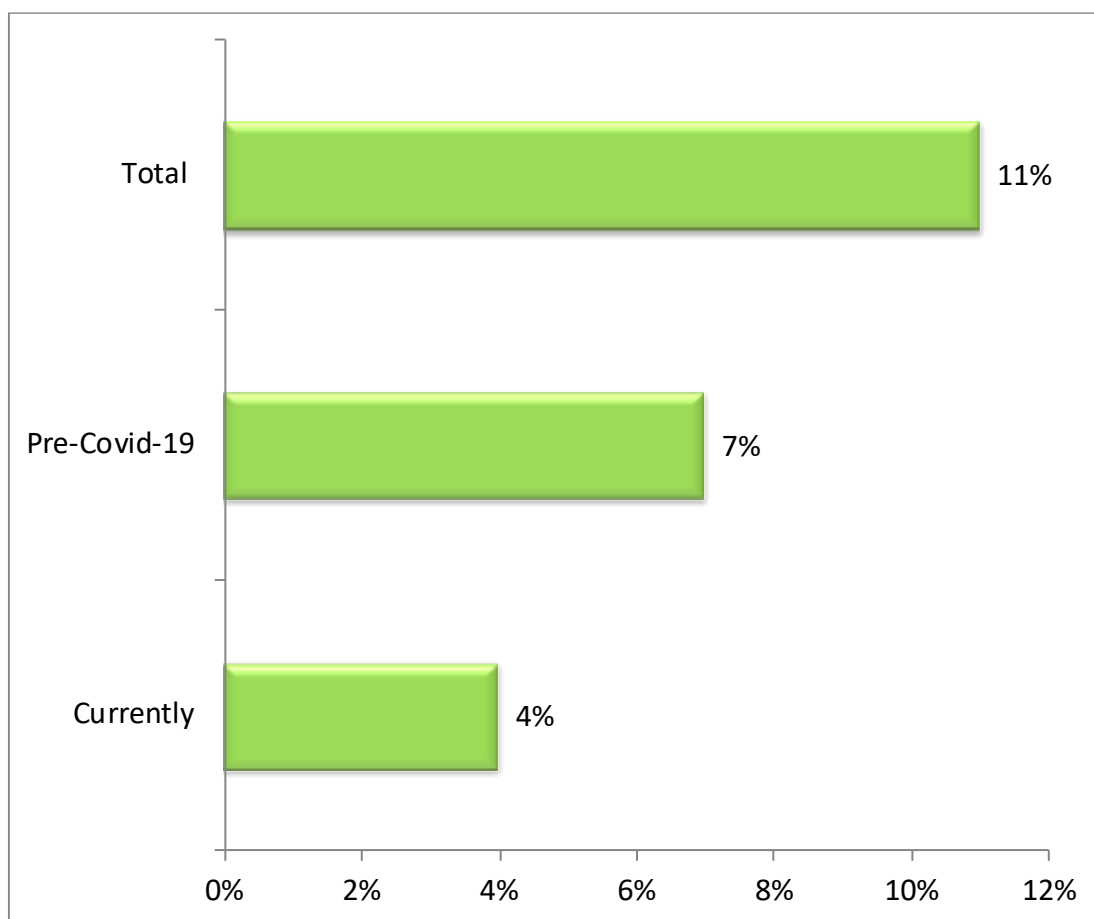


Base: Total area resident sample (400).

Question: Do you currently belong to a health or fitness club, or a recreation center in the area?

- As suggested already, an important reason for this lower than average incidence of health club/wellness center membership is Covid-19.
- An additional 7% of area residents claim to have been members at some type of health club or wellness center prior to the pandemic.
- Thus, prior to Covid-19, 11% of area residents, still low by national standards, were members somewhere other than the YMCA.

Health Club/Recreation Center Membership



Base: Total area resident sample (400).

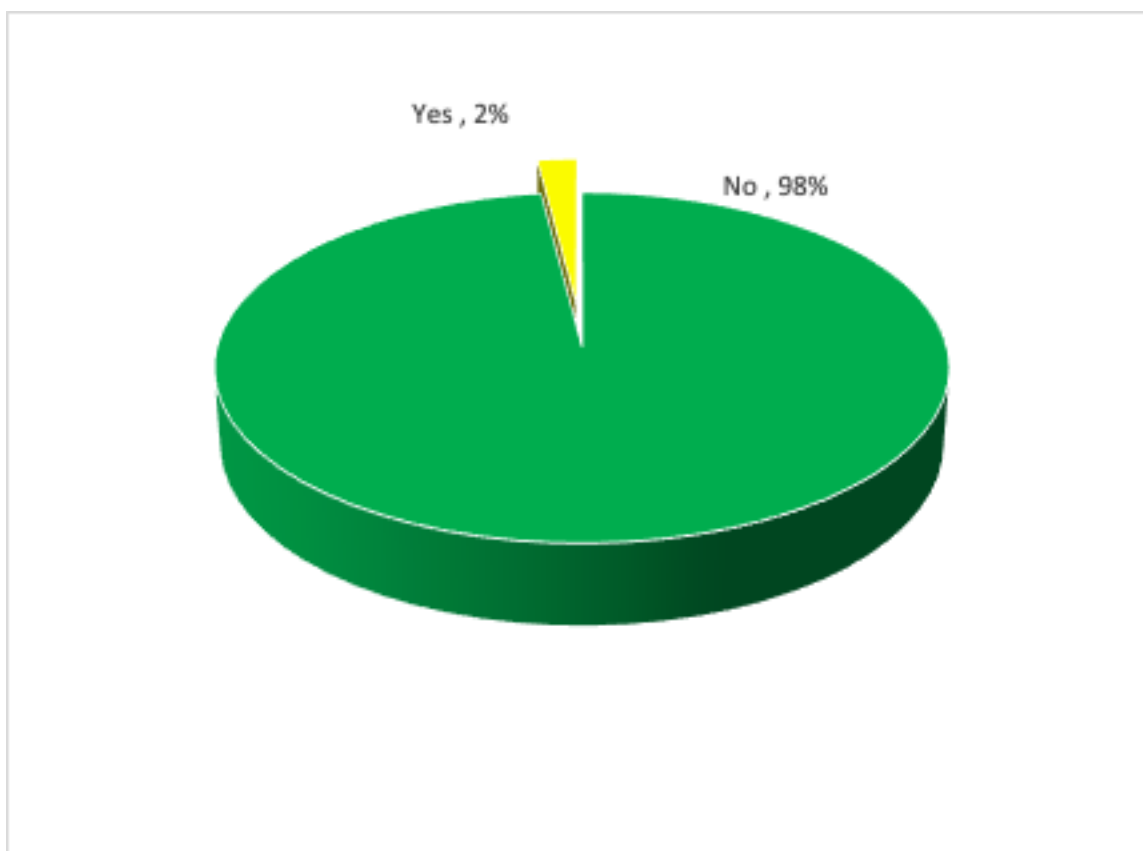
Question: Prior to the Covid-19 pandemic were you a member of a health club or recreation center?

III. Unmet Needs: Prior to Covid-19

Local residents were asked whether or not they had any unmet needs or wants in terms of healthy living, sports, exercise, or recreation for which they could not find an acceptable source prior to the Covid-19 Pandemic, or even more recently.

- Only 2% of local area residents claim to have had unmet healthy living, sports, exercise, or recreational needs or wants prior to Covid-19, or have these needs now.
- This means, not only are a lower percentage of local residents currently seeking wellness at a health club or recreation center of some kind, but also only a small percentage are actively looking for opportunities for additional, healthy lifestyle improvements.

Unmet Needs



Base: Total area resident sample (400).

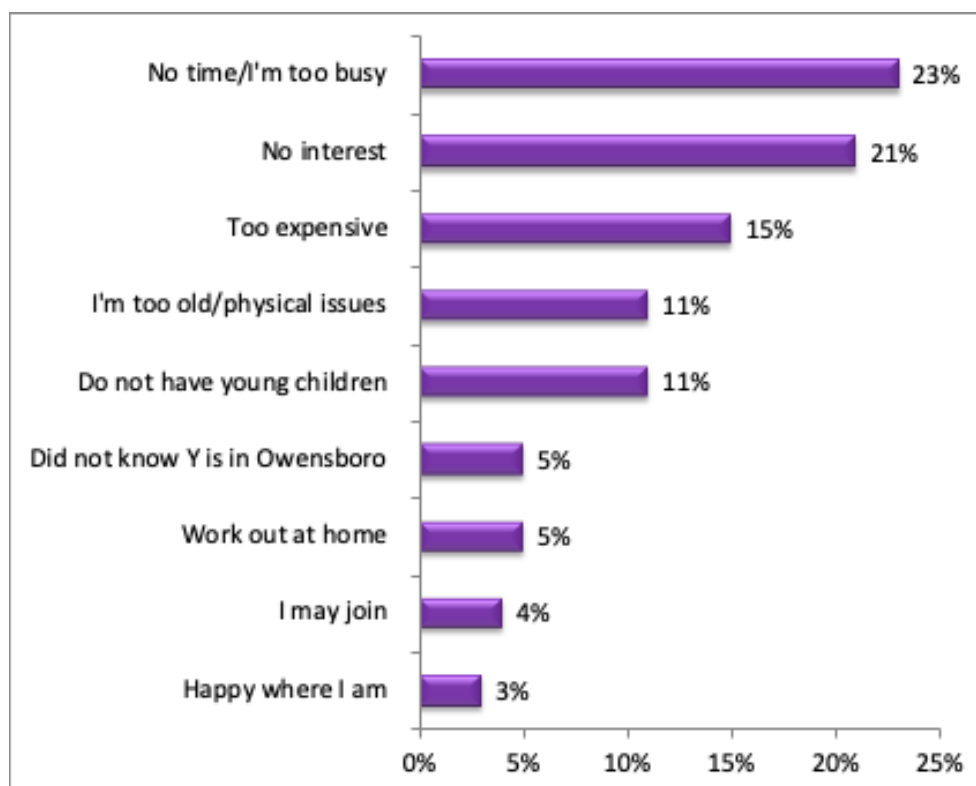
Question: Prior to the Covid-19 pandemic, or even more recently, have you or has anyone in your household looked for fitness, sports, healthy living, or recreational activities in and around Owensboro to participate in and not been able to find what you want?

IV. Reasons for Not Being a YMCA Member

Area residents were asked to explain, in their own words, why they are not members of the Owensboro Family YMCA.

- Area residents, in general, often present “lazy reasons” for not being members of the Owensboro Family YMCA. That is,
 - I’m too busy (23%).
 - No interest (21%).
- Others, however, believe that YMCA is not necessarily appropriate because they see themselves as being too old, too physically hindered, or do not have young children at home. **These residents either do not know that YMCAs typically offer programming for seniors, those with physical limitations, and adults without children, or they believe what the Owensboro Family Y offers in these areas is not of interest to them personally.**
- Five percent (5%), or one out of every twenty local residents claim they did not know Owensboro had a YMCA.

Reasons for Not Being a YMCA Member



Base: Total area resident sample (400).

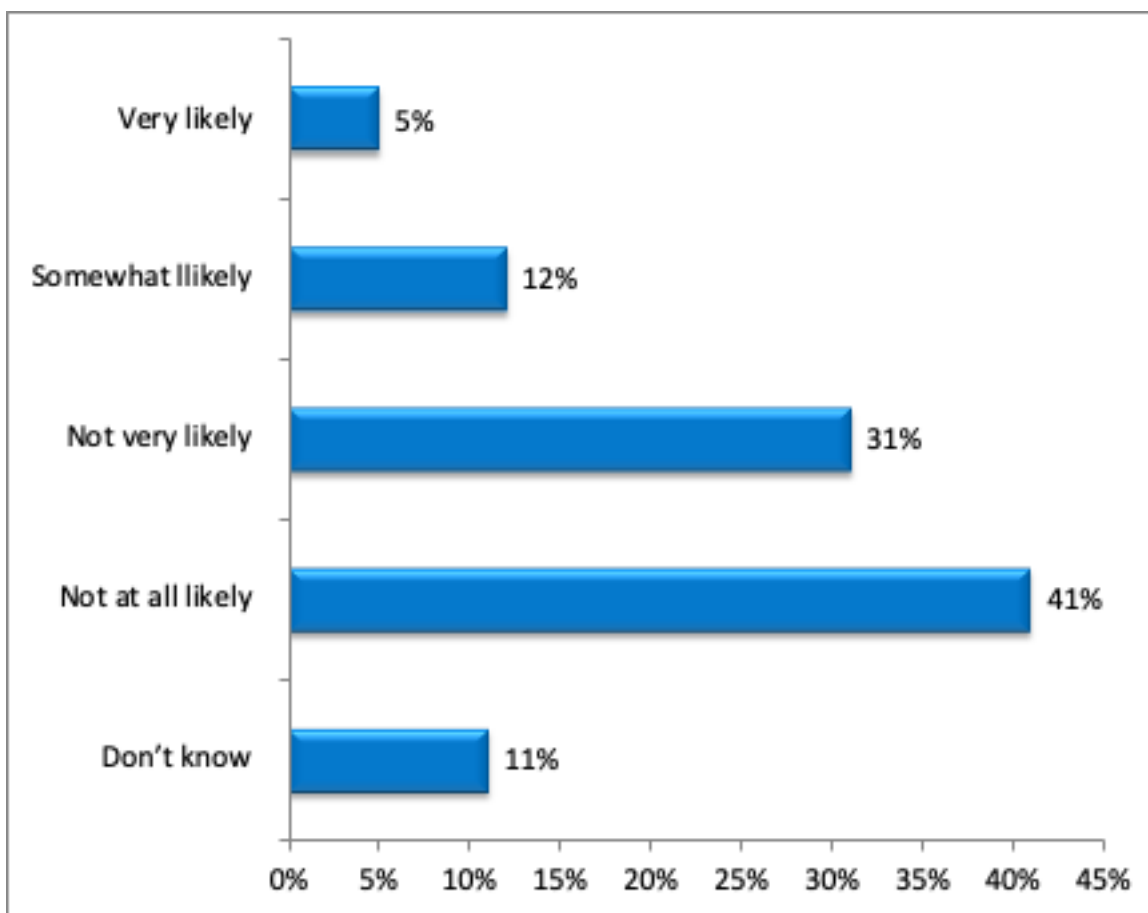
Question: In your own words please explain why you are not a member of the Owensboro Family YMCA?

V. Likelihood of Joining the YMCA

Area residents were asked how likely they are to join the Owensboro Family YMCA within 6 to 12 months of the coronavirus outbreak subsiding. This question was asked prior to any information about potential changes or new YMCA offerings being presented. As such, this is a “pre” improvement measure.

- Five percent (5%) of local residents claim to be very likely to join the Owensboro Family YMCA soon after the Covid-19 pandemic is resolved.
- An additional 12% are somewhat likely to join.
- While percentages from this question often yield exaggerated interest in YMCA membership, they serve as an indicator that YMCA membership is at least a consideration to an additional 17% of the population.

Likelihood of Joining the YMCA



Base: Total area resident sample (400).

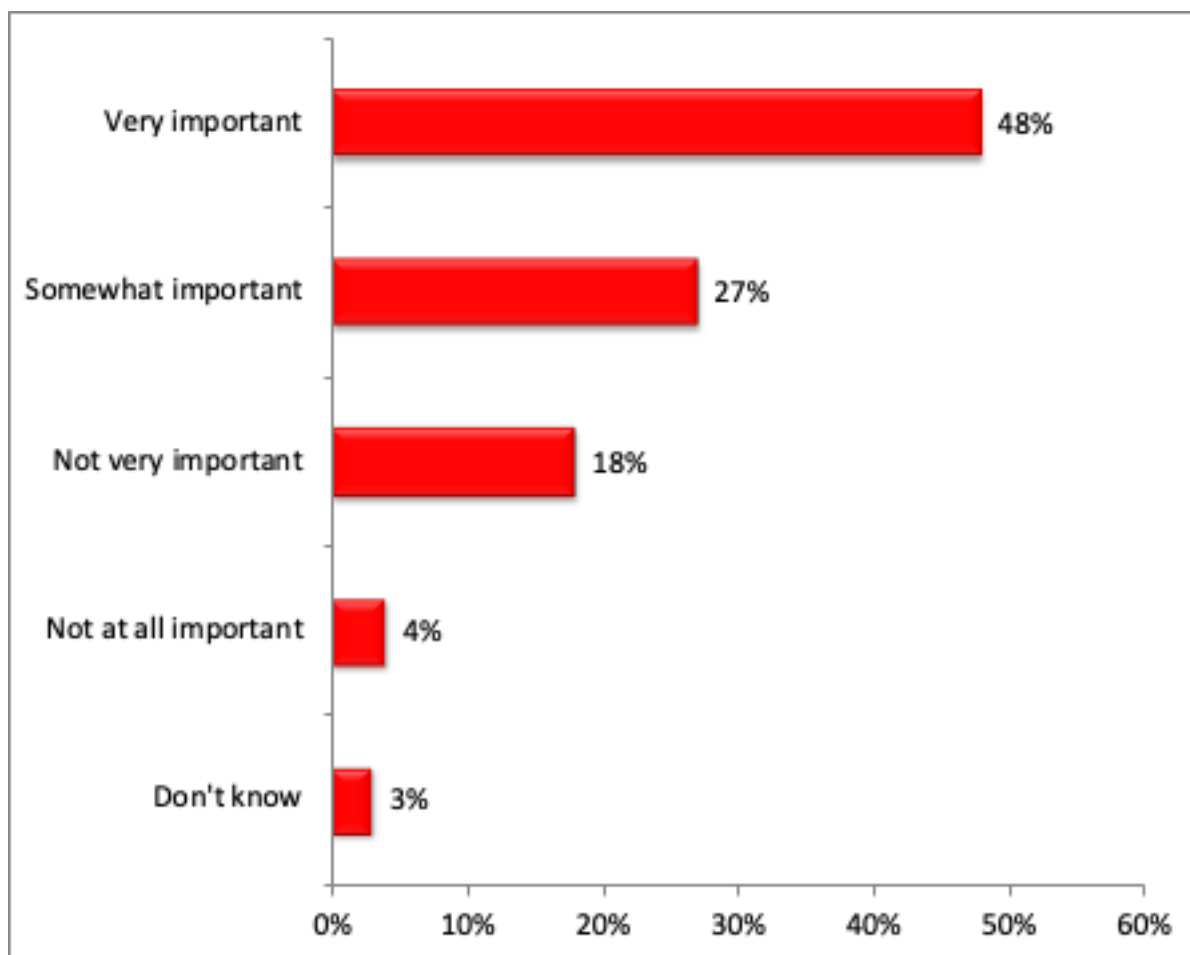
Question: How likely is it that you or someone in your household will join the Owensboro Family YMCA within 6 to 12 months after the coronavirus outbreak subsides?

VI. Is the YMCA Important to Owensboro

In the focus groups that preceded the area resident telephone and online survey, it was suggested by some that perhaps the YMCA has outlived its importance in the community, and that if the Owensboro Family YMCA were to close, residents would simply satisfy their needs elsewhere at facilities and organizations already available locally.

- Data shows, however, that this is not the opinion of the vast majority of local residents. Rather, a large percentage (75%) of those people who live in Owensboro and Daviess County (who are not Y members) believe a successful and vibrant Y is important to the community.

Importance of a Successful, Vibrant YMCA in Owensboro



Base: Total area resident sample (400).

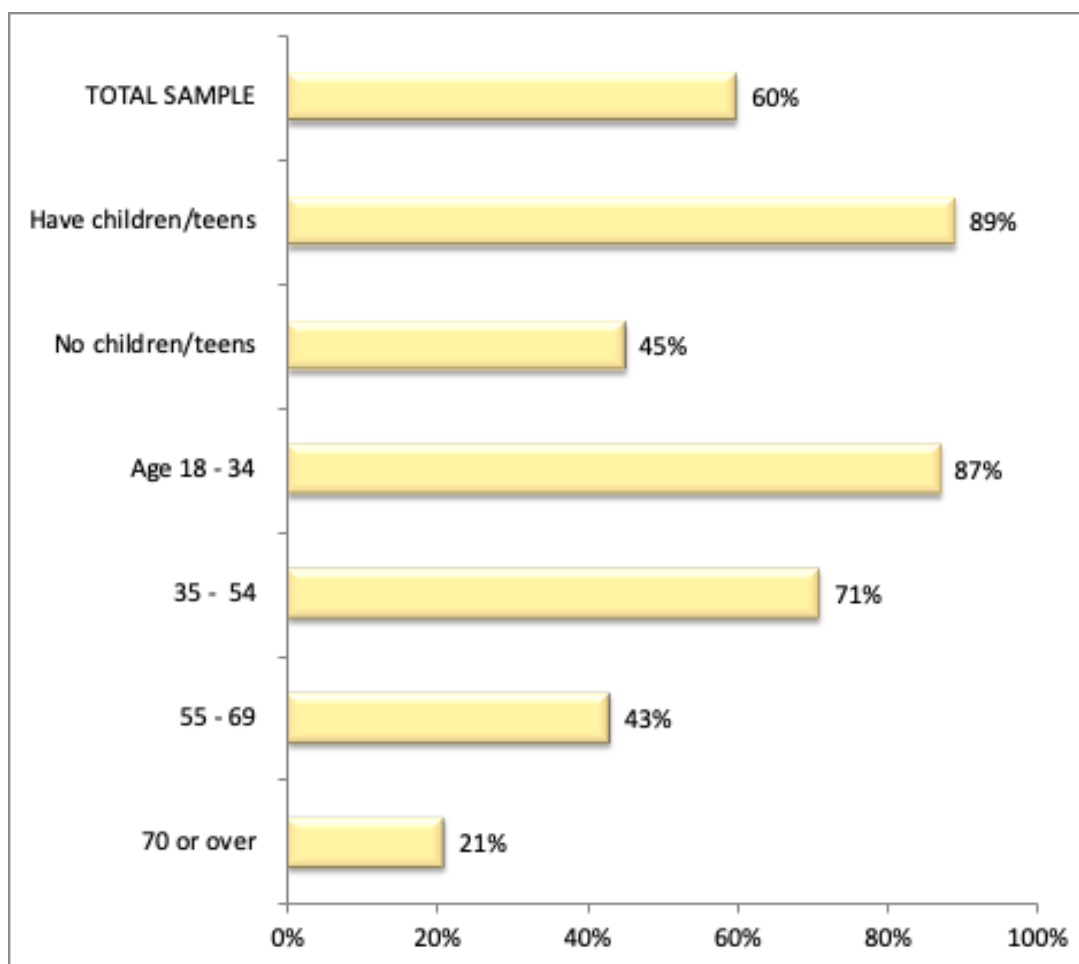
Question: In your opinion, how important is it to the community that Owensboro has a successful and vibrant YMCA?

VII. Personal Relevance of YMCA Membership

Next, local residents were asked whether they thought membership in the Owensboro Family YMCA is for someone like themselves or for some other type of person. This is a measure of personal relevance.

- Six out of ten (60%) of area residents believe membership in the Owensboro Family YMCA is “for someone like me”.
- The percentage of those with children/teens in their homes believing Y membership is personally relevant is even higher (89%).
- Younger adults (those under 55) are more likely than are their older neighbors to see YMCA membership as personally relevant.

Membership in the Owensboro Family YMCA is for Someone Like Me



Base: Total area resident sample (400).

Question: In your opinion, is membership in the Owensboro YMCA for someone like you or for some other type of person?

VIII. Interest in Specific Facilities and Programs at a New/Renovated YMCA

Participants were asked how interested they are in each of 14 major Y programs and facilities, if offered by a new or improved Owensboro Family YMCA.

- Of the factors tested, those most likely to attract usage are:
 - Indoor, multi-purpose pool (56%).
 - Indoor, walking/running track (47%).
 - State-of-the-art fitness center (31%).
 - Programs and facilities to help prevent or recover from illness or injury (25%).
 - A social area within the Y for meeting friends and relaxing before and after class (25%).
 - A free weight room (24%).
- Although neither before/after school childcare or infant/toddler care are necessarily of interest to as many local residents as are other offerings considered in this question, the fact that (10% - 11%) of all area residents express interest in childcare at the YMCA represents a meaningful number of households.
- The low interest level for virtual exercise classes, versus more traditional programming at the Y, indicates that while virtual offerings, that permit at home participation, may now be popular, it is likely that when the current pandemic is resolved, most people will want to return to YMCA facilities.
- Readers should note that there are significant differences in level of interest in many of these tested factors based upon a respondent's age.

Interest in Specific Facilities and Programs
% Very Interested

	TOTAL SAMPLE (%)	18 - 34 (%)	35 - 54 (%)	55 - 69 (%)	70+ (%)
Indoor pool	56	73	71	48	16
Indoor track	47	57	54	39	32
Fitness center	31	47	39	22	5
Illness/injury prevention	25	20	21	35	26
Social area	25	40	29	13	11
Free weight room	24	43	36	4	--
Teaching kitchen	22	37	32	6	8
Full court gym	19	43	18	4	--
Teen Center	19	30	36	--	--
Kids Zone	19	33	25	9	--
Exercise studios	18	27	14	17	11
Childcare center	11	27	7	4	--
Infant/toddler care	10	27	4	4	--
Virtual exercise classes	6	10	7	--	5

Base: Total area resident sample (400).

Question: How interested are you in each of the following if offered by a new or improved Owensboro Family YMCA?

IX. Interest in Specific YMCA Programs

Respondents were presented with 24 possible Y programs or activities and asked to indicate how interested a household member would be in participating in each, if offered at a new or improved Owensboro Family YMCA.

- Of the programs tested, those that draw the greatest level of interest from area residents are:
 - Water-based exercise.
 - Lap swimming.
 - Programs that help students succeed in school.
 - Health and wellness education.
 - Indoor cycling.

Interest in Specific Y Programs

	Very Interested (%)	Somewhat Interested (%)	Not Interested (%)
Water exercise	30	20	40
Lap swimming	36	21	43
Programs that help students succeed in school	31	12	57
Health/wellness education	31	20	49
Indoor cycling	30	20	50
Youth violence prevention	23	12	65
Fitness for beginners	21	15	64
Age-specific youth fitness	21	8	71
Nutrition, diet, weight loss	20	27	53
Parent/child programs	20	7	73
Women only	19	24	57
Archery	19	12	69
Pilates, Zumba, yoga	18	16	66
Physical rehab	15	15	70
Swim lessons	13	7	80
Pickleball	11	11	78
Personalized fitness	11	10	79
Before/after school programs	10	5	85
Senior social/exercise programs	9	18	73
Martial arts	9	16	75
Summer day camp	9	6	85
Core/functional training	9	5	86
Youth tutoring	7	8	85
Fitness for adults 45+	5	16	79

Base: Total area resident sample (400).

Question: And, how interested are you or members of your household in each of these programs if offered by a new or improved Owensboro Family YMCA?

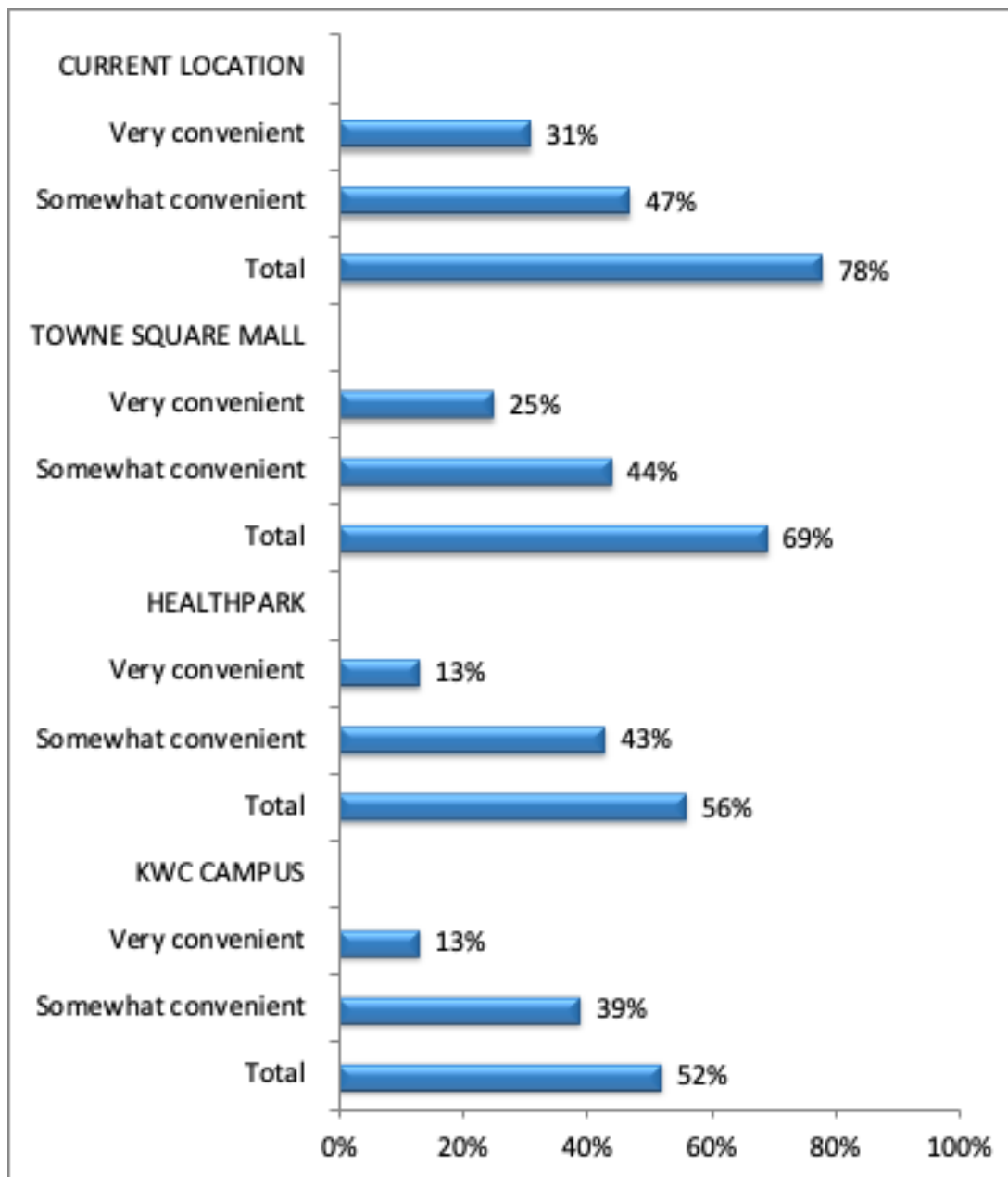
X. Convenience of Potential New YMCA Sites

Area residents were asked to indicate how convenient they believe a new or improved YMCA would be for their use, if it were located at four potential sites.

The locations tested are:

- ✓ The current location of the Owensboro Family YMCA at 900 Kentucky Parkway.
 - ✓ Within a revitalized, Towne Square Mall.
 - ✓ Within a new building on the campus of Kentucky Wesleyan College.
 - ✓ At Healthpark.
- Of these locations, the current site, followed by Towne Square Mall are perceived to be convenient by significantly more area residents than either Healthpark or the campus of Kentucky Wesleyan College.

Convenience of Potential Locations



Base: Total area resident sample (400).

Question: There is some discussion about completely re-imagining the YMCA in Owensboro in either a new or totally renovated building. Four locations are being considered. For each, please indicate how convenient this location is for you and house members?

XI. Price Elasticity of Demand

A series of three questions were asked for each site in order to determine how many member units (households) are likely to join a new or re-imagined YMCA if it is built at the specific location.

First, respondents were read a description of the new YMCA, followed by testing of likelihood of joining at three monthly price points. Importantly, each price point was tested independently for each site. The first rates tested were \$75 per month for a household including all children, and \$59 per month for an individual, \$55 per month for a senior, and \$49 per month for a young adult (13 – 24) membership.

Likelihood of joining was rated on a four-point scale of very likely, somewhat likely, not very likely, or not at all likely. Those who claim to be very likely to join at the highest tested rates for a specific location were skipped out of the remaining pricing questions for a new Y at that site.

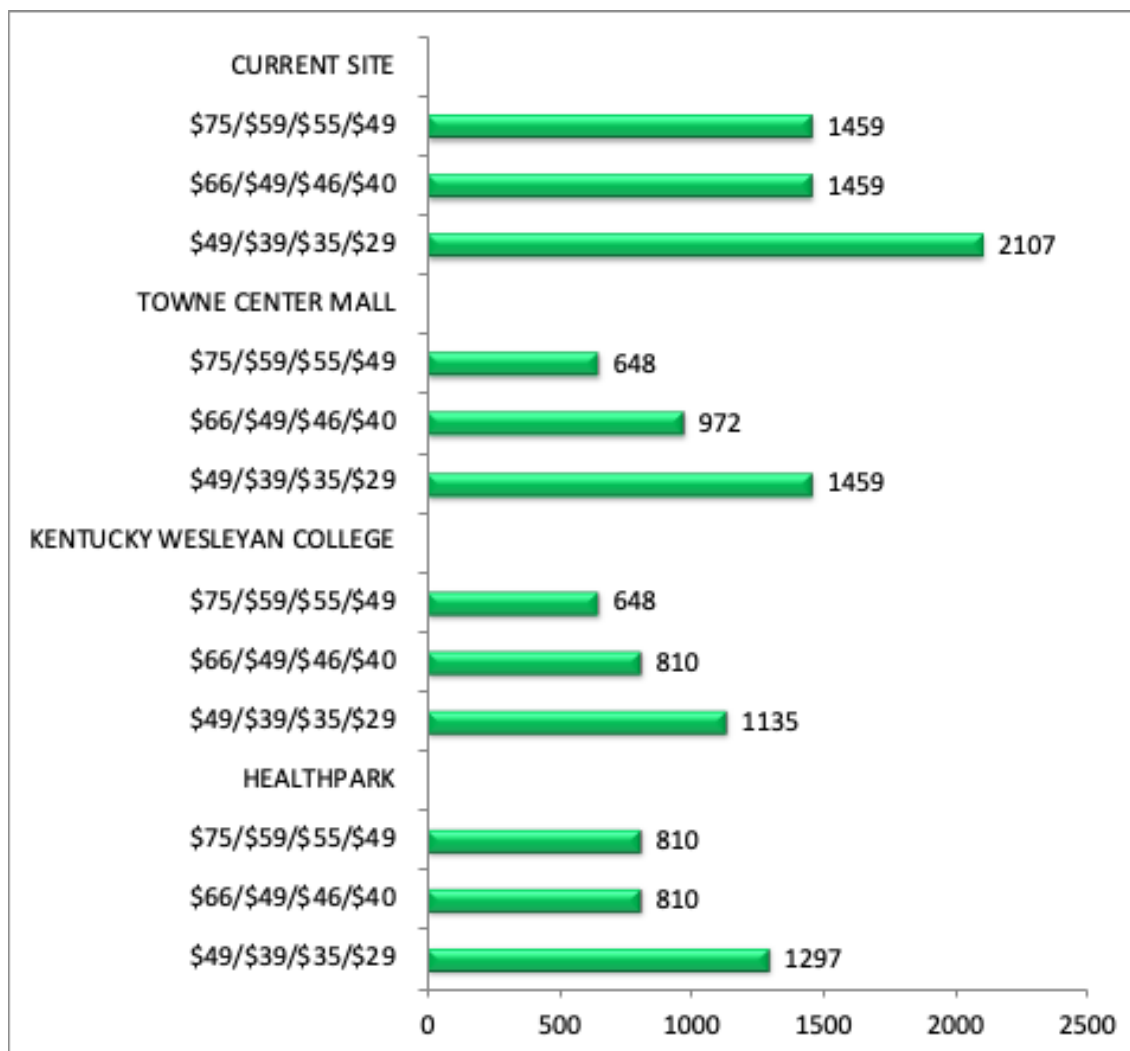
Those respondents who did not answer very likely at \$75/\$59/\$55/\$49 were asked a second, similar question, but at rates of \$66/\$49/\$46/\$40. These are the approximate full cost membership rates now being charged by the YMCA.

Those respondents less than very likely to join a new YMCA at rates of \$66/\$49/\$46/\$40 were asked again about a Y at rates of \$49/\$39/\$35/\$29.

The data from this questioning was then modeled and applied to the population of the area (less the approximate number of existing Y households) to produce estimates of the number of new member units likely to join the Y at each site at varying monthly membership rates.

- The chart on the following page demonstrates that demand for the new YMCA is both price and site elastic. That is, as the cost per month of YMCA membership declines, the percentage of area residents and the number of projected full pay member units may increase significantly, and that location of the new Y matters.
- Of the sites tested, the current location on Kentucky Parkway appears likely to draw the greatest number of new member units at all of the tested fee levels.
- The data in the chart is for new member units within 1 year of opening. That is, households that are new to the Y. It does not include member units that are currently YMCA members and are likely to remain if a new YMCA is built or the existing YMCA is renovated.
- Similarly, these projections are for full pay member units and do not include anyone who is offered reduced fee membership for any reason.
- **These estimates assume there is not a joining fee. If a one-time joining fee exists, it is likely these projections will greatly over-estimate demand. This warning should not be ignored, the difference is often significant.**
- These estimates assume the Covid-19 pandemic is essentially resolved when the new/re-imagined YMCA opens.

Price Elasticity of Demand Full Pay Members Units – Year One



Base: Total area resident sample (400).

Question: How likely is it that you will join the new, state-of-the art YMCA, if it is located at [READ CHOICE OF LOCATIONS ONE AT A TIME], if a membership for a couple or household including all children costs \$75 per month. An individual adult membership is \$59 per month, and individual senior membership is \$55 per month and a young adult membership costs \$49 a month?

How likely is it that you will join the new, state-of-the art YMCA, if it is located [READ LOCATION CHOICES ONE AT A TIME BUT READ ONLY THOSE LESS THAN VERY LIKELY IN Q20], if a membership for a couple or household including all children costs \$66 per month, an individual adult membership is \$49 per month, and individual senior membership is \$46 per month and a young adult membership costs \$40 a month?

How likely is it that you will join the new YMCA located [READ LOCATION CHOICES ONE AT A TIME, BUT READ ONLY THOSE LESS THAN VERY LIKELY IN Q21], if a membership for a couple or household costs \$49 per month, an individual adult membership costs \$39 per month, an individual senior membership costs \$35 and an individual young adult membership is \$29 per month?

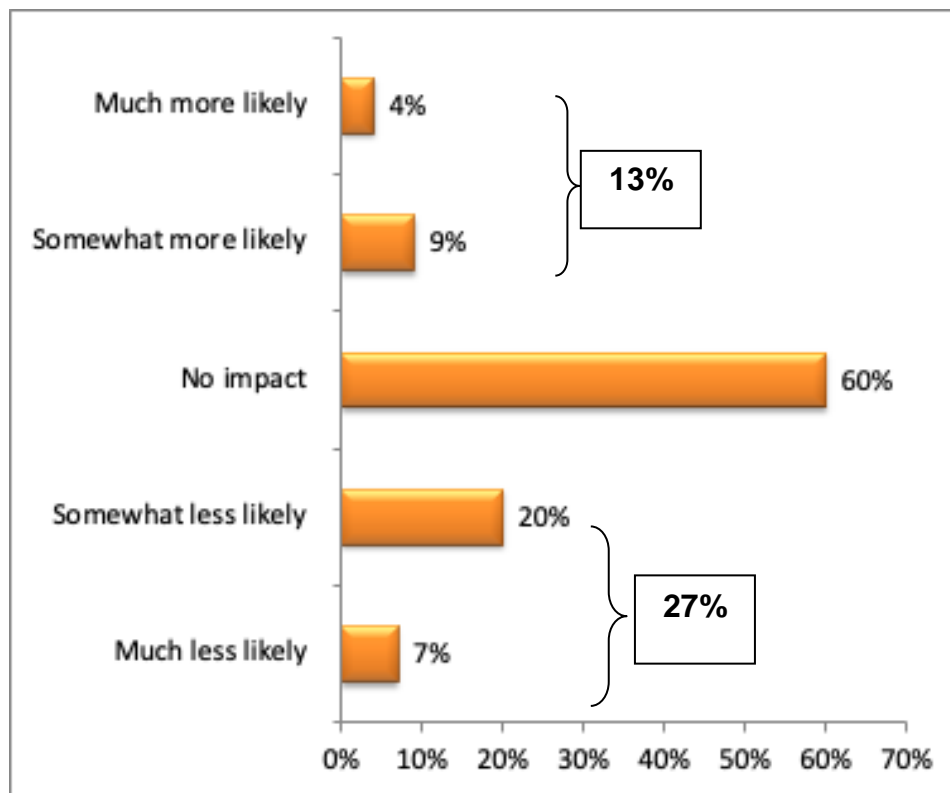
XII. A Partnership Between the YMCA and Kentucky Wesleyan College

Respondents were read the following description of a potential partnership between the YMCA and Kentucky Wesleyan College, and asked to indicate what impact, if any, it would have on their likelihood of joining an on-campus YMCA. The idea here is to provide more information to residents regarding a key feature of a new Y if it were to be located on the campus of Kentucky Wesleyan College.

“If the new Y opens on the campus of Kentucky Wesleyan College, the new building might be managed by the YMCA and the college together. Students, staff, and faculty of the college would have access to everything the Y offers, and there might also be classes and programs offered by the college specifically for students to enhance their education. College faculty may also provide programming to community members that a YMCA might not otherwise have available. Community members who join the new Y would have access to all the facilities and programs except those specifically for students.”

- It appears that the idea of joint programming and management of a new YMCA with Kentucky Wesleyan College will not have an immediate positive impact in terms of motivating additional interest in joining the YMCA. Either residents do not necessarily like the idea of sharing a Y with college students or they do not intuitively understand the advantages to having the new Y on campus.
- If this concept for a new Y is to move forward, management will need to continually emphasize the reasons why this partnership makes sense and clearly communicate the consumer benefits of having the Y on campus.

Impact of Partnership with Kentucky Wesleyan College on Likelihood of Joining



Base: Total area resident sample (400).

Question: Does this joint programing and management of a new YMCA on the campus of Kentucky Wesleyan College make you **[READ SCALE]** to join the new YMCA?

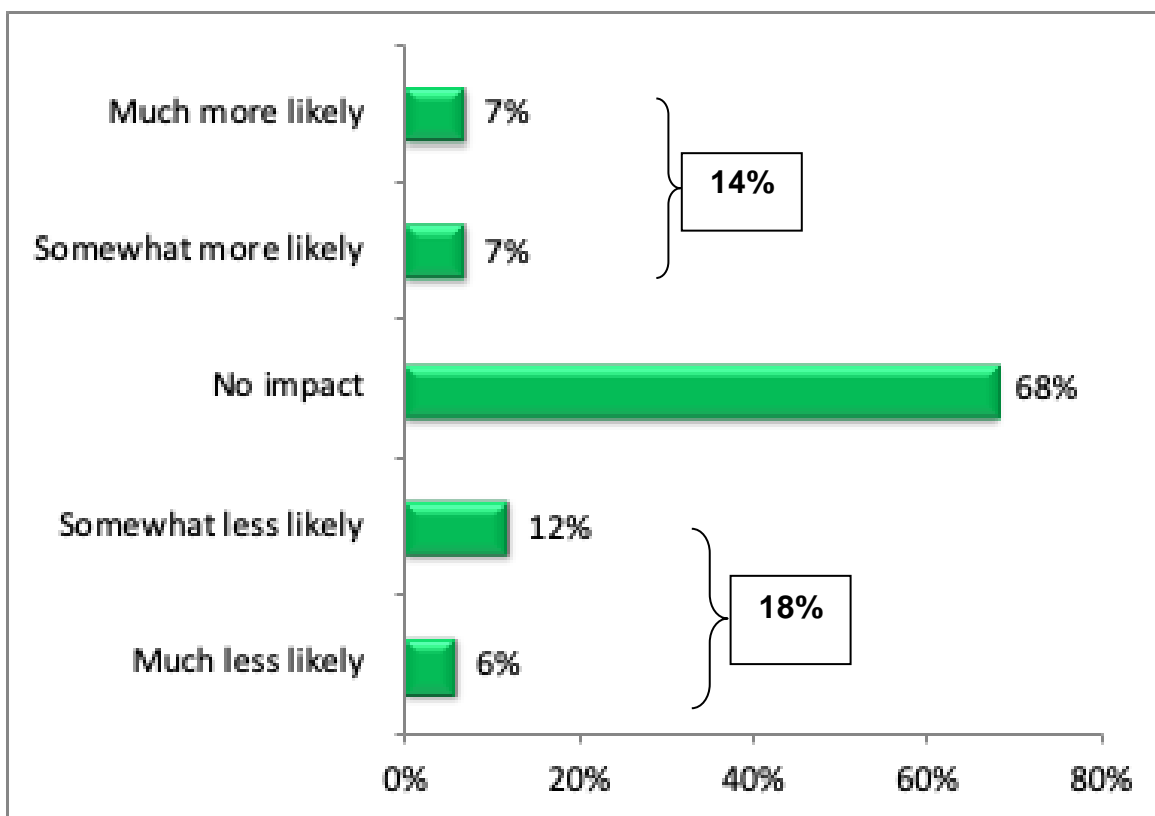
XIII. Impact of Non-Profit Collaborations at Towne Square Mall

When read the following:

“If the new YMCA is to open in the Towne Square Mall, it is likely to be joined by a number of other community and non-profit organizations, such as the Boys & Girls Club, United Way, Red Cross, etc.”

- Area residents do not perceive any positive motivation to join the new Y at Towne Square Mall because the YMCA may be surrounded by other not-for-profit organizations.

Impact of Not-for-Profit Collaboration at Towne Square Mall on Likelihood of Joining



Base: Total area resident sample (400).

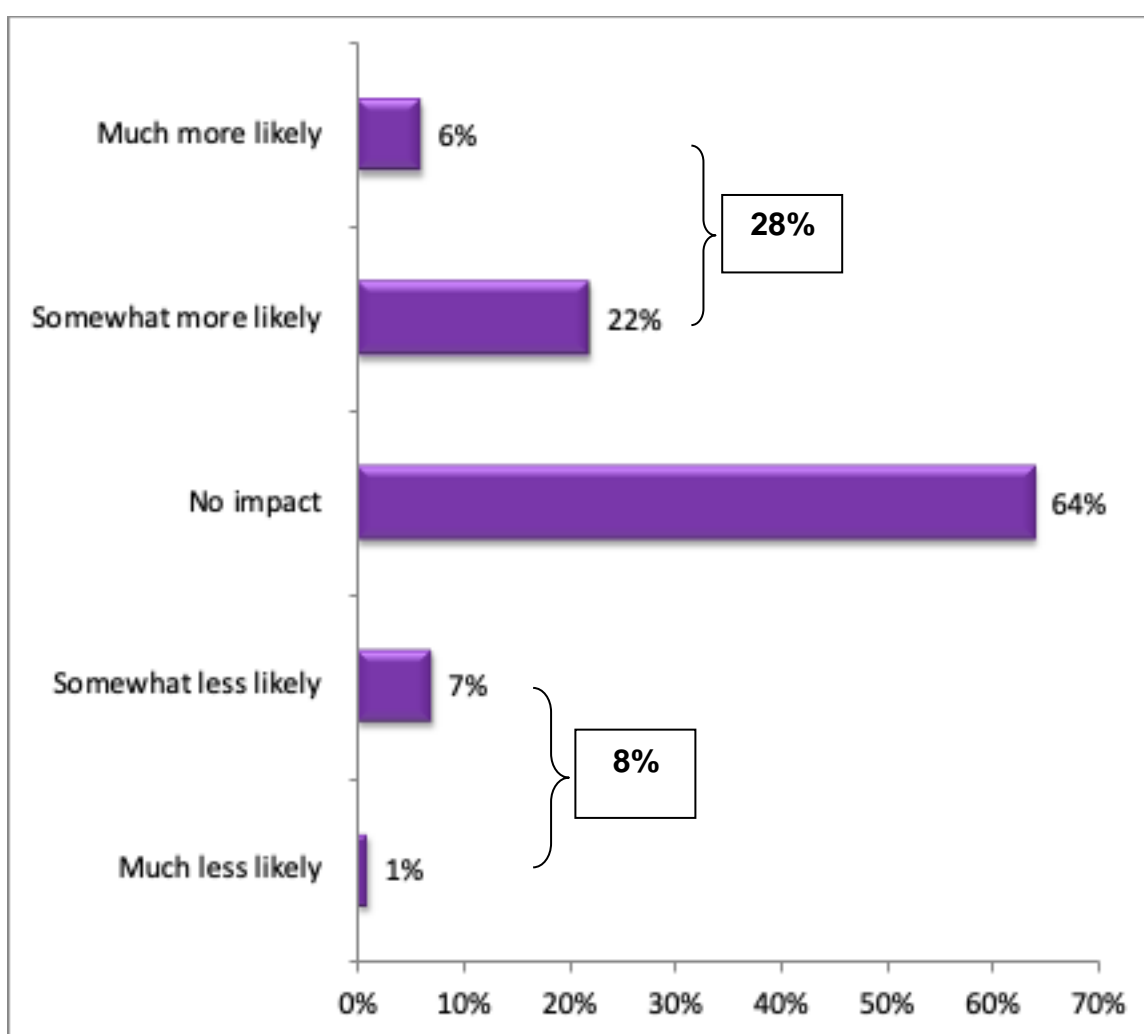
Question: If the YMCA opens at the mall and other not-for-profit organizations also open there, does this make you **[READ SCALE]** to join the new YMCA?

XIV. Impact of a Closer Partnership with Healthpark

- The idea of a closer partnership with Healthpark, as described in the following statement, will motivate additional area residents to join the YMCA.

“The YMCA is also considering a closer partnership with Healthpark. That is, the YMCA name may appear on the Healthpark building and the YMCA would begin to offer new and improved programming at the Healthpark site, including all of the family and youth programs the Y is known for across the country. Members would have access to all the programs and facilities of Healthpark and the YMCA.”

Impact of Closer Partnership with Healthpark on YMCA Membership



Base: Total area resident sample (400).

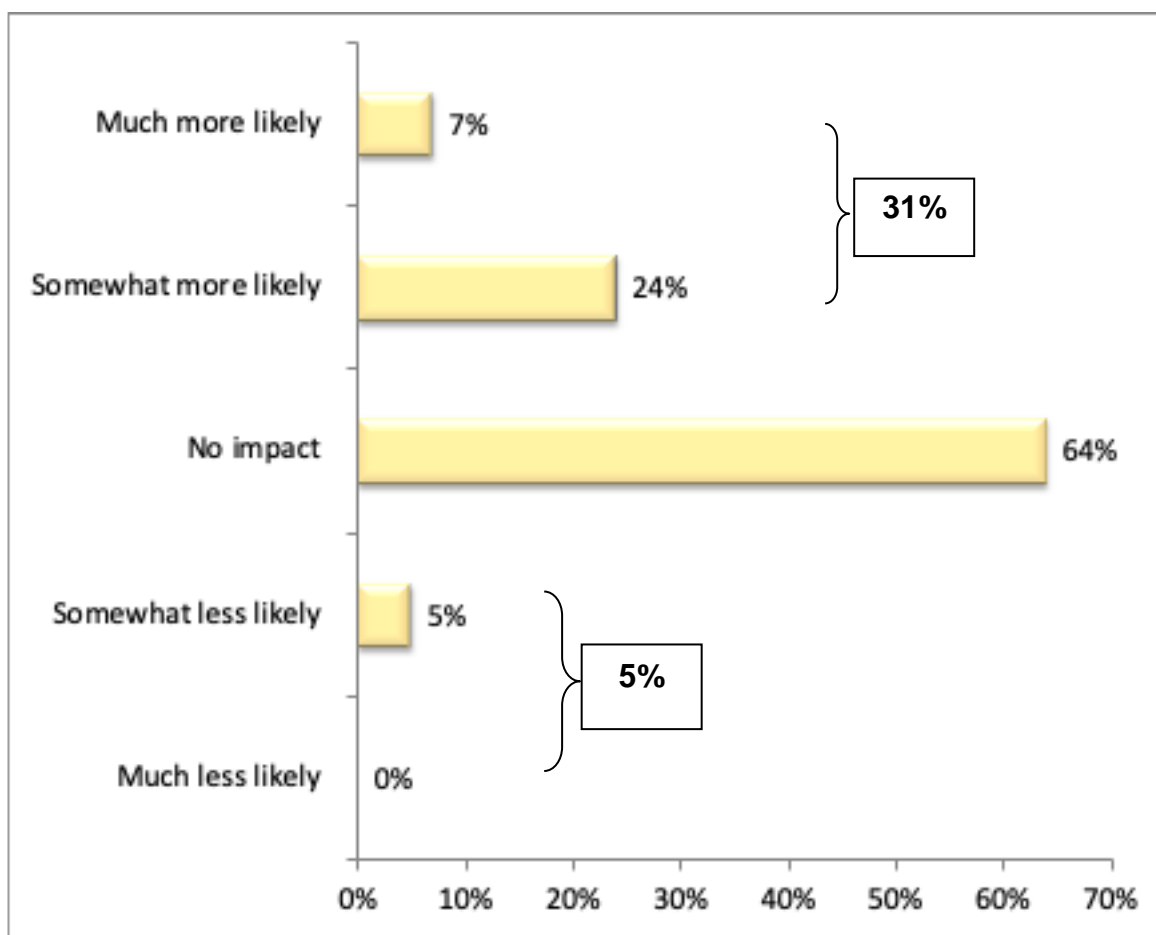
Question: If the YMCA were to open at Healthpark, does this make you [READ SCALE] to join the new YMCA?

XV. Impact of New Childcare Center at Current Site.

- Opening a new childcare center in a separate building at the current site of the YMCA will increase membership at a re-imagined Owensboro Family YMCA.
- From a strictly research perspective, of the growth concepts tested, this expansion at the current Y location offers the greatest opportunity for the YMCA.

“If the YMCA remains at their current location, the building would be completely renovated and expanded. This expansion is likely to include the purchase of additional land and the opening of an expanded state-of-the art childcare facility for before and after school care.”

Impact of New Childcare Center on Likelihood of Joining the YMCA



Base: Total area resident sample (400).

Question: If a completely renovated and expanded YMCA at the current location includes this new childcare center, does it make you **[READ SCALE]** to join the new YMCA?

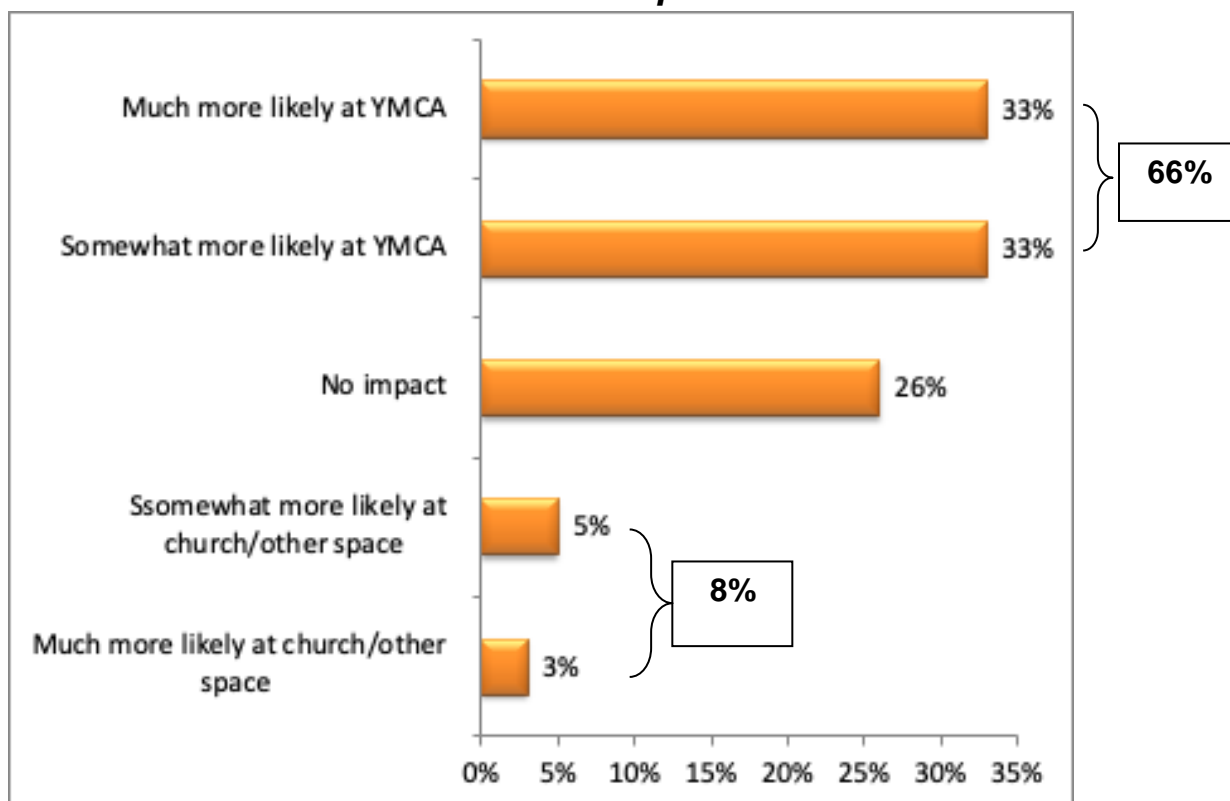
XVI. YMCA Programming at Churches and Other Community Facilities

During the focus groups that preceded the area resident interviewing, multiple participants suggested that perhaps, instead of renovating the current Y facility, or building a new YMCA, the Owensboro Family YMCA should attempt to better serve area residents by providing programs at local churches and other available community spaces.

This hypothesis was tested by asking where respondents would rather go to participate in a YMCA program of great personal interest. To a new/renovated YMCA or to their church or other existing community space.

- Eight percent (8%) of area residents claim to be more likely to join a YMCA program if held at a church/community space versus a new YMCA.
- In contrast, 66% of area residents (33% much more likely and 33% somewhat more likely) claim to be more likely to join a YMCA program in a new YMCA facility rather than at a church or community space.
- Thus, it appears moving some current Y programming into the community and outside the walls of the YMCA may increase interest in YMCA offerings, it is unlikely to be an adequate substitute for a new/re-imagined Owensboro Family YMCA.

Preference: YMCA or Church/Other Space For YMCA Classes



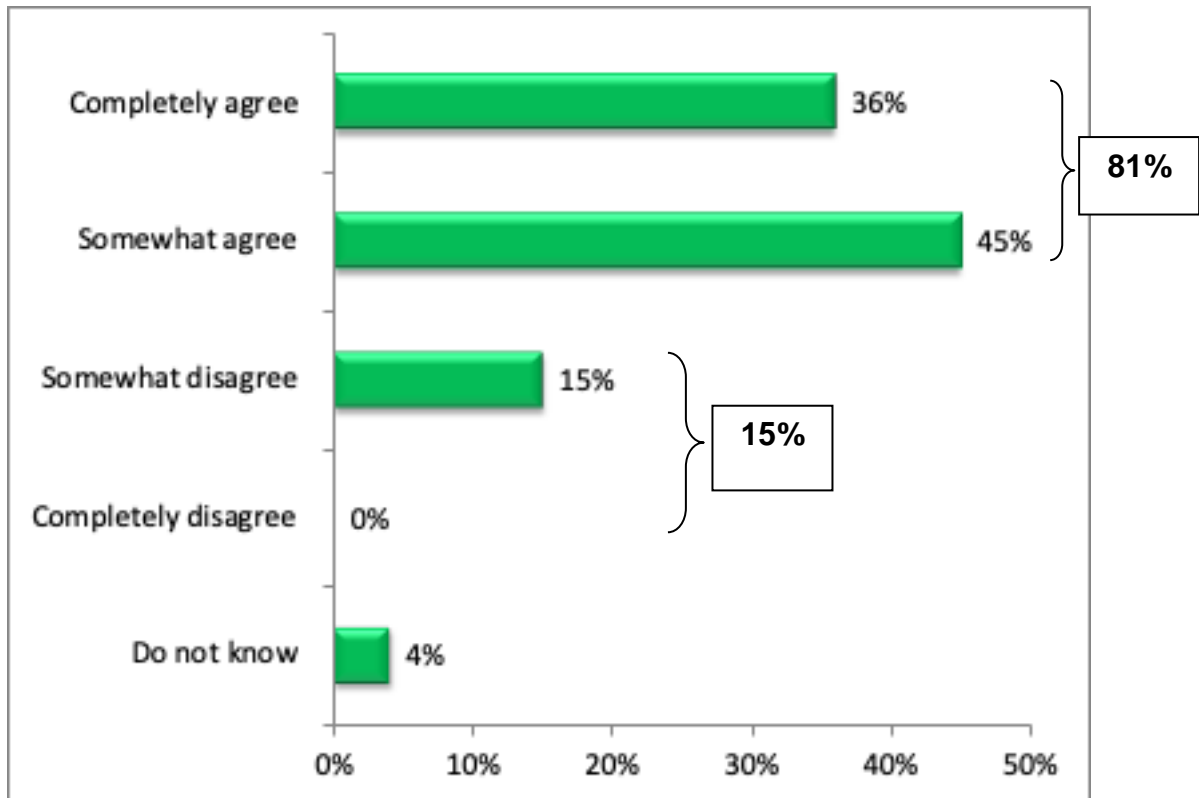
Base: Total area resident sample (400).

Question: If a completely renovated and expanded YMCA at the current location includes this new childcare center, does it make you [READ SCALE] to join the new YMCA?

XVII. Agreement with Statements

- Overwhelmingly, area residents believe that City of Owensboro and Daviess County deserve a better YMCA than the existing facility.

The City of Owensboro And Daviess County Deserve A Better Y Than What We Now Have

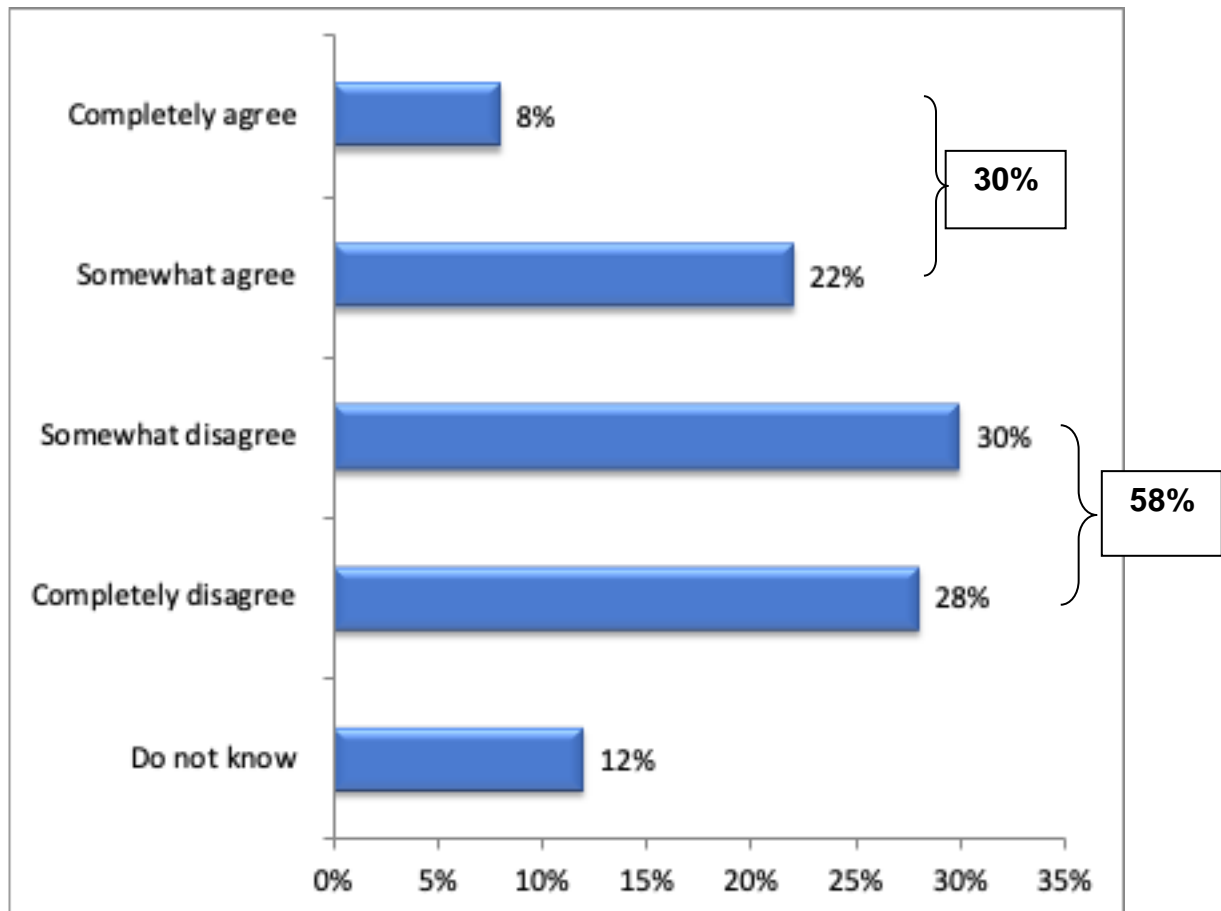


Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

- However, most local residents are, at this point in time, not convinced that taxpayer money should be used to build a better Owensboro Family YMCA. This negative reaction is likely to be influenced by the economic impact of Covid-19 pandemic and the uncertainty it has created for many individuals, families and communities.

The City And County Should Use Taxpayer Money To Help The YMCA Build Better Facilities In Owensboro

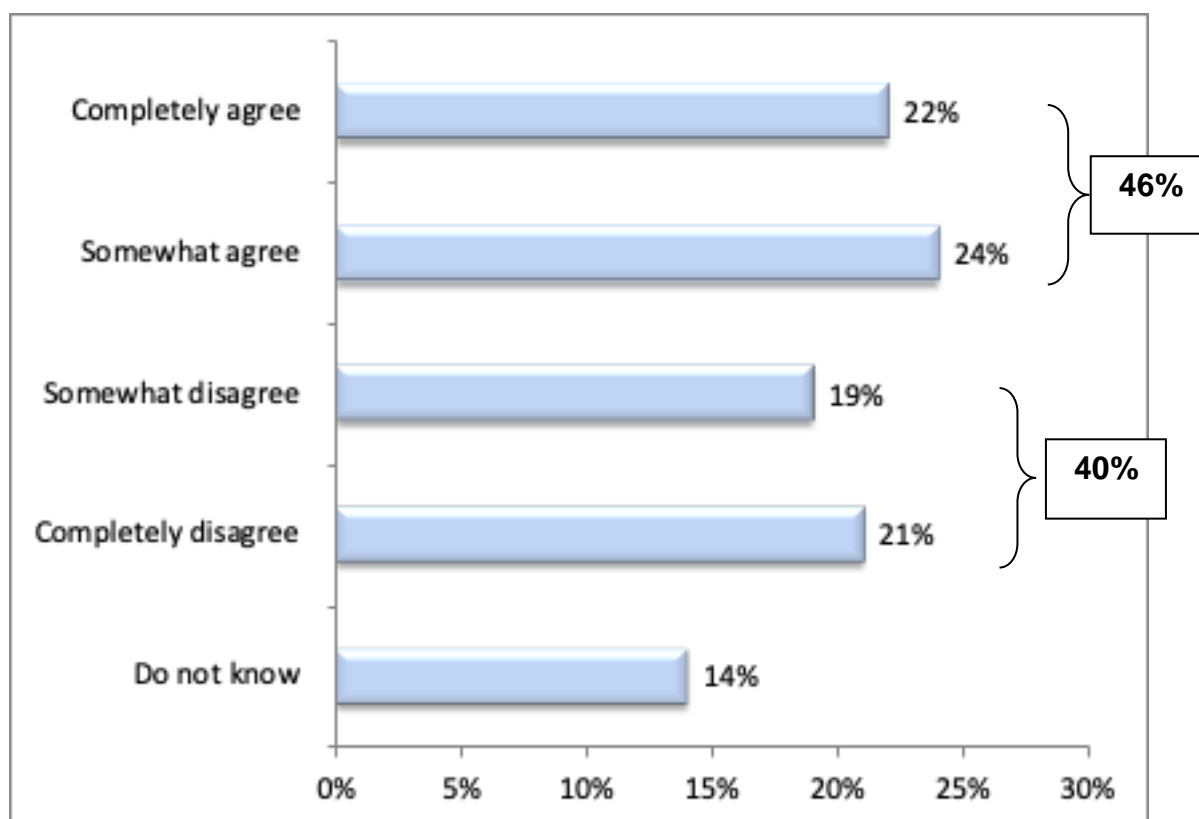


Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

- Nearly one half (46%) of the area residents, who are not Y members, participating in this study claim that, if asked, they would donate \$25 to help build and maintain a better Owensboro Family YMCA. **This statistic more than likely overstates the level of support a \$25 build a new YMCA campaign may attract in the real world, however it does demonstrate that a meaningful percentage of local residents believe the Y is charity worthy of their financial support.**

If Asked, I Would Donate \$25 To Help The Y Build And Maintain A Better Facility In Owensboro

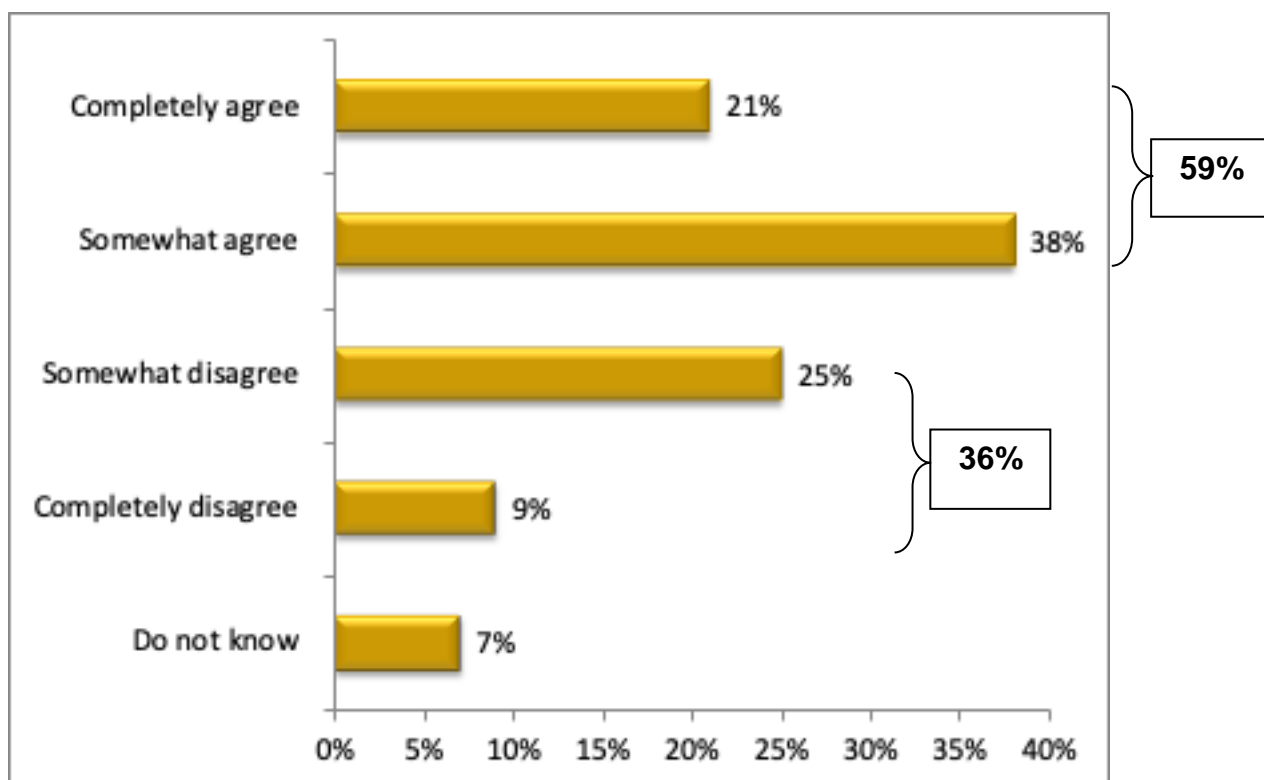


Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

- Six out of ten (59%) of area residents, who are not Y members, believe that, if the Owensboro Family YMCA were to close, many people in the community would not be able to find programs and services they need. *The strength of this response again demonstrates that area residents, even if they do not personally belong to the YMCA, believe a vibrant Y is important to the City of Owensboro and Daviess County.*

If The YMCA Were To Close, Many Residents Of Owensboro And Daviess County Would Not Be Able To Find Services And Programs They Need

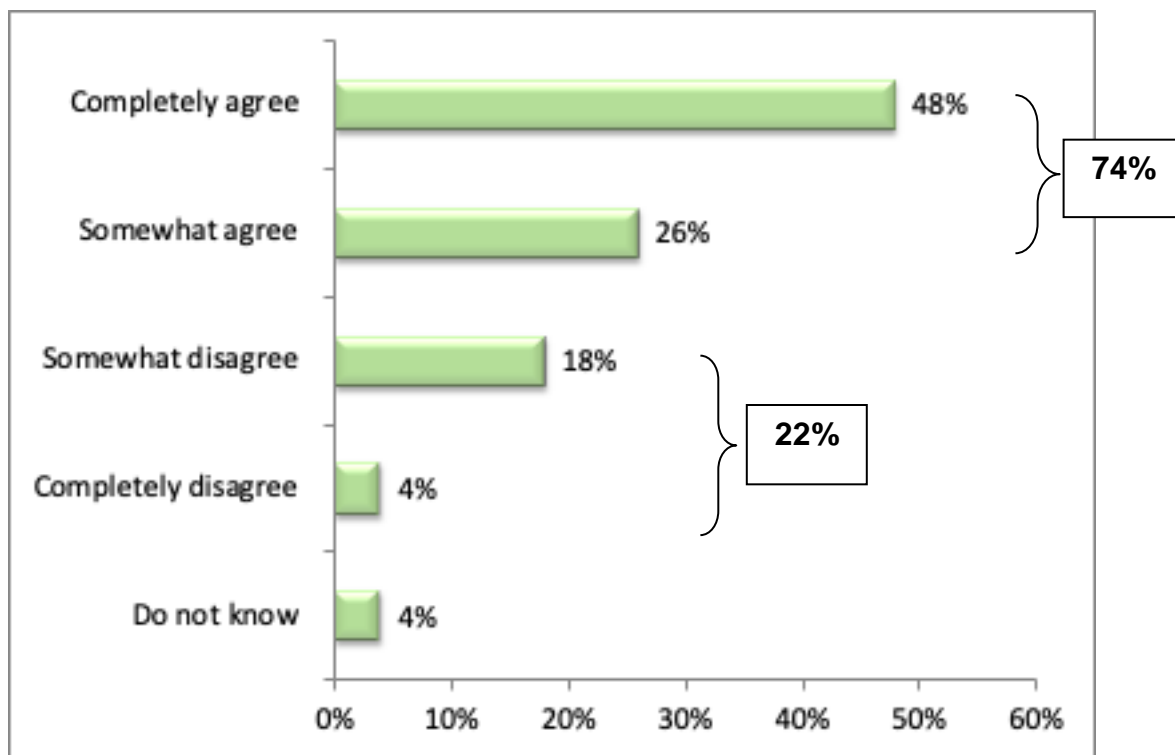


Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

- Three quarters (74%) of local residents, who are not Y members, believe the Owensboro Family YMCA makes the City of Owensboro and Daviess County a better place to live.

***The YMCA Makes Owensboro And Daviess County
A Better Place To Live***

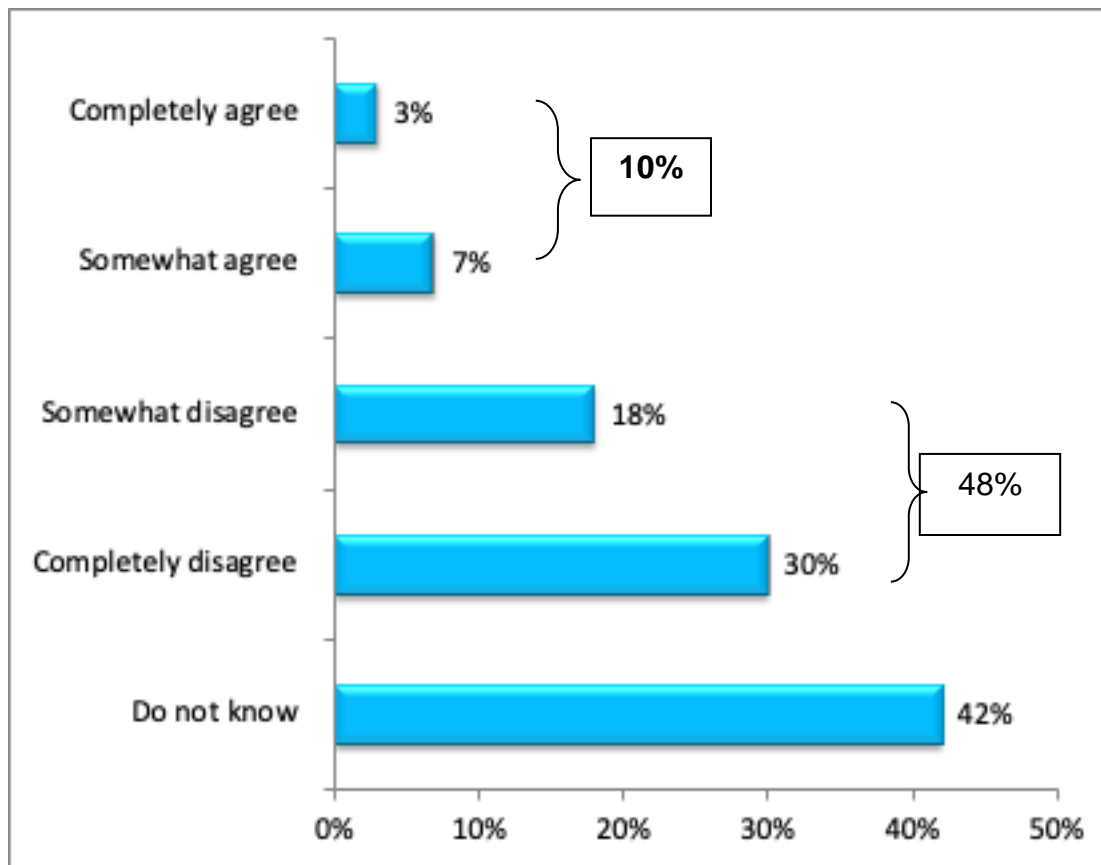


Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

- Only 10% of area residents show any level of willingness to volunteer at the Owensboro Family YMCA.

***If Asked, I Would Volunteer 5 Hours Of My Time
To Help The YMCA***



Base: Total area resident sample (400).

Question: How strongly do you agree or disagree with the following statements?

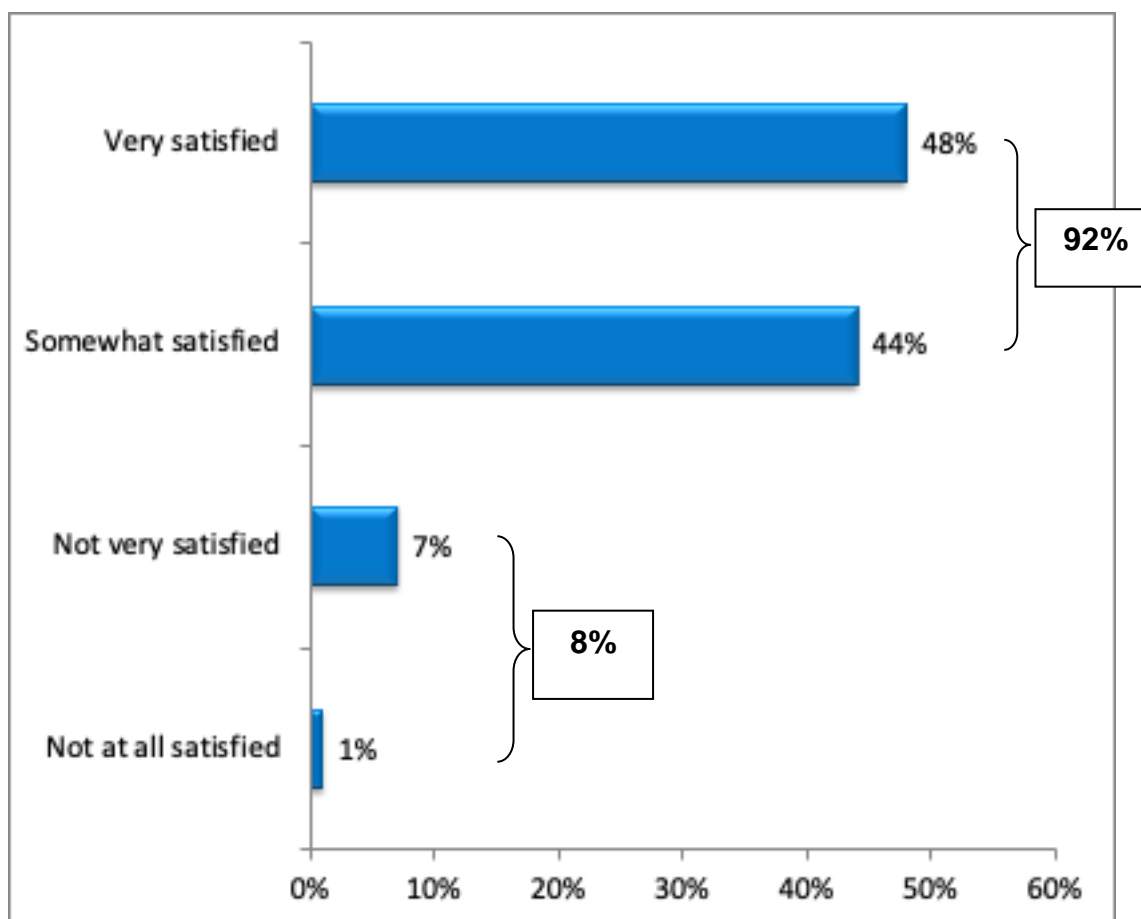
Detailed Findings: Owensboro Family YMCA Members

I. Member Satisfaction

The results presented in this portion of the report are based upon 244 online surveys completed by members of the Owensboro Family YMCA. Of these 48% are Silver Sneakers/other insurance-based admittance (Silver Sneakers), 30% have household memberships and 40% have individual memberships.

- Nine out of ten (92%) Y members claim to be either “very” (48%) or “somewhat” (44%) satisfied with their membership.

Member Satisfaction

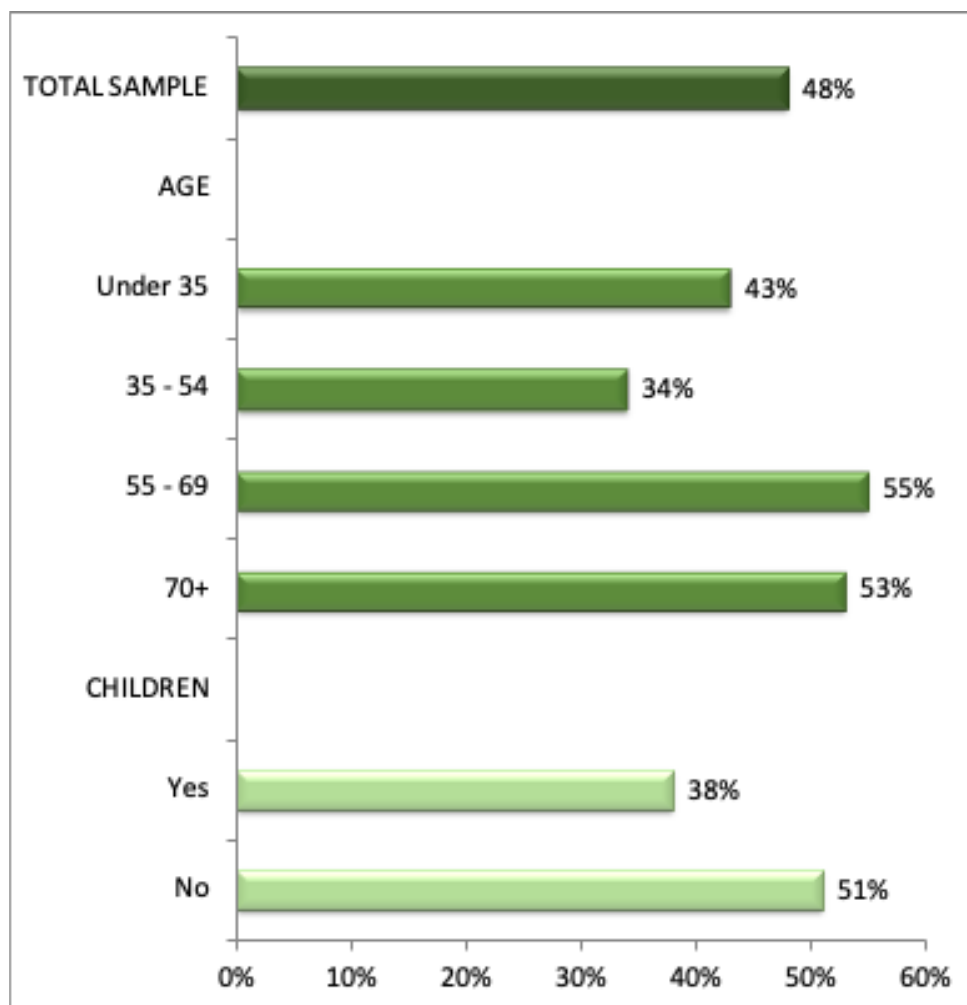


Base: Total member sample (244).

Question: How satisfied are you with your membership in the YMCA?

- Typically, older Y members are more likely to be very satisfied than are their younger neighbors, and Y members without children in their homes are more likely to be very satisfied than are those with youngsters. This is the situation at the Owensboro Family YMCA.
- Just because this is a pattern that PB&A often sees, does not mean that the Owensboro Family YMCA should be complacent in attempting to better serve younger members and those households that have children or teens. In fact, it indicates just the opposite.
- Silver Sneakers (53%) are more likely to be very satisfied than are household members (41%) and slightly more likely to be very satisfied than are individual members (49%).

Member Satisfaction
% Very Satisfied

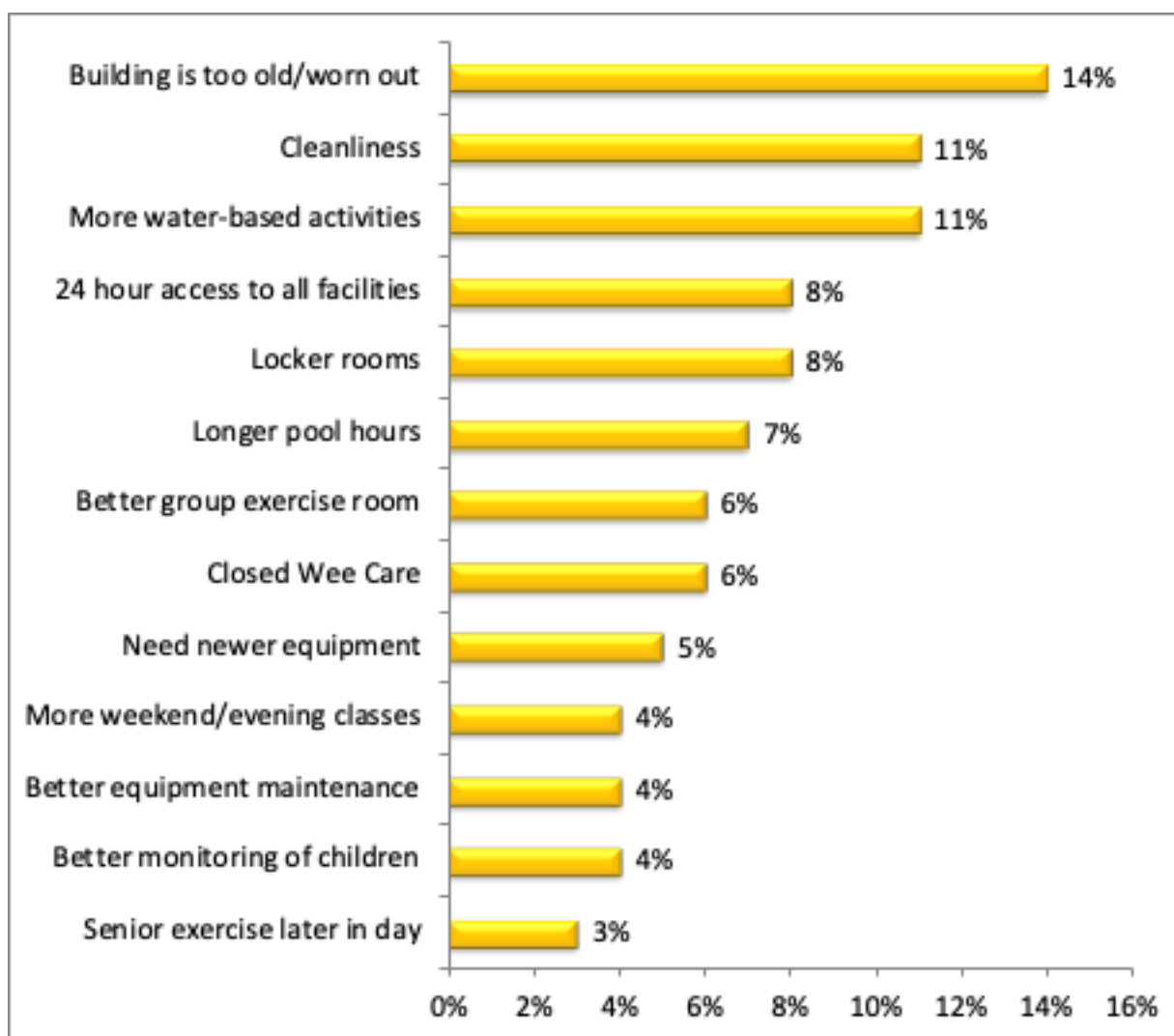


Base: Total member sample (244).

Question: How satisfied are you with your membership in the YMCA?

- The primary reasons some members are less than very satisfied with their membership at the Owensboro Family YMCA are listed in the following chart.
- On an open-ended basis, most often, members complain about:
 - The building is seen as being old and worn out (14%).
 - Cleanliness (11%) – NOTE: Older Y facilities whether actually well maintained or not are often viewed as less than clean regardless of actual condition.
 - A desire for water-based exercise (11%).

***Reasons for Being Less than Very Satisfied
(Unaided)***



Base: Members who are less than very satisfied (104).

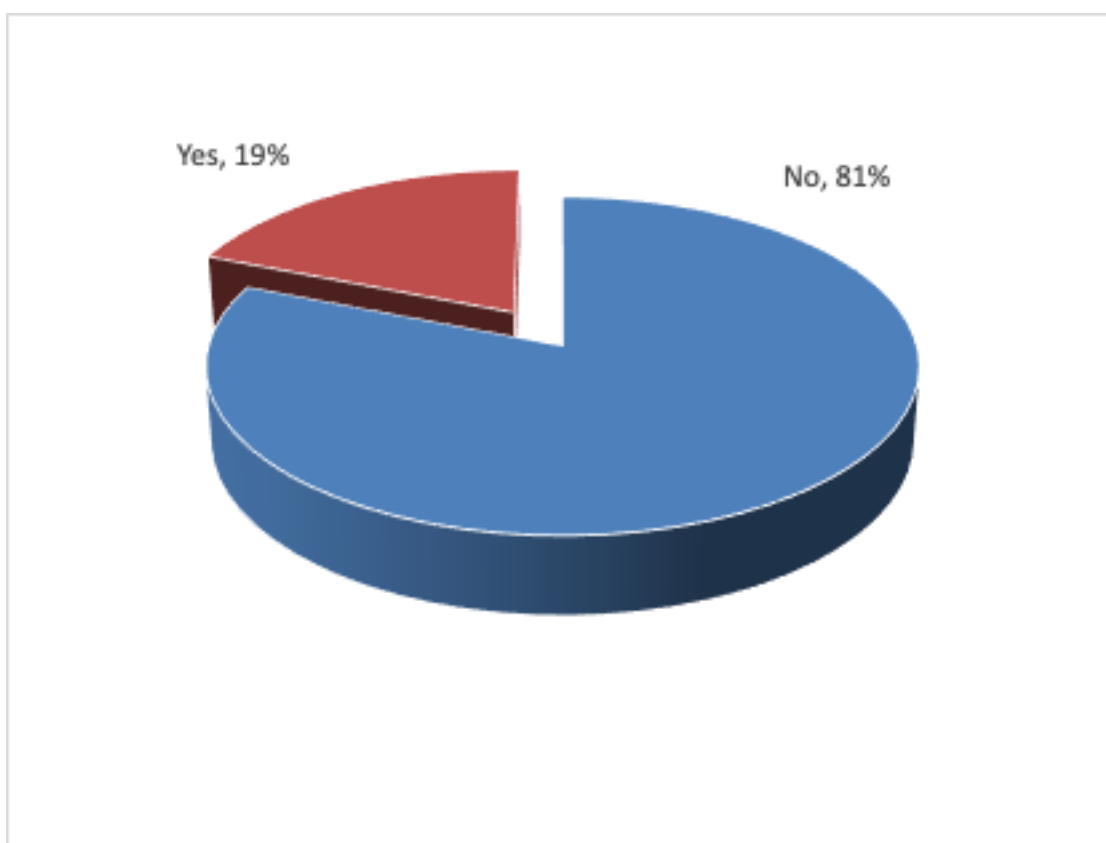
Question: Why are you less than very satisfied?

II. Unmet Needs: Prior to Covid-19

Y members were asked whether or not they had any unmet recreation, exercise, or healthy living needs prior to the Covid-19 pandemic that they wish the Y would address but are not being met.

- Two out of ten (19%) Y members claim to have unmet needs that the Y is not addressing.
- This represents a large percentage of members who want programs and facilities that are not currently offered by the Owensboro Family YMCA.

Unmet Healthy Living Needs (Not Addressed by the Y)

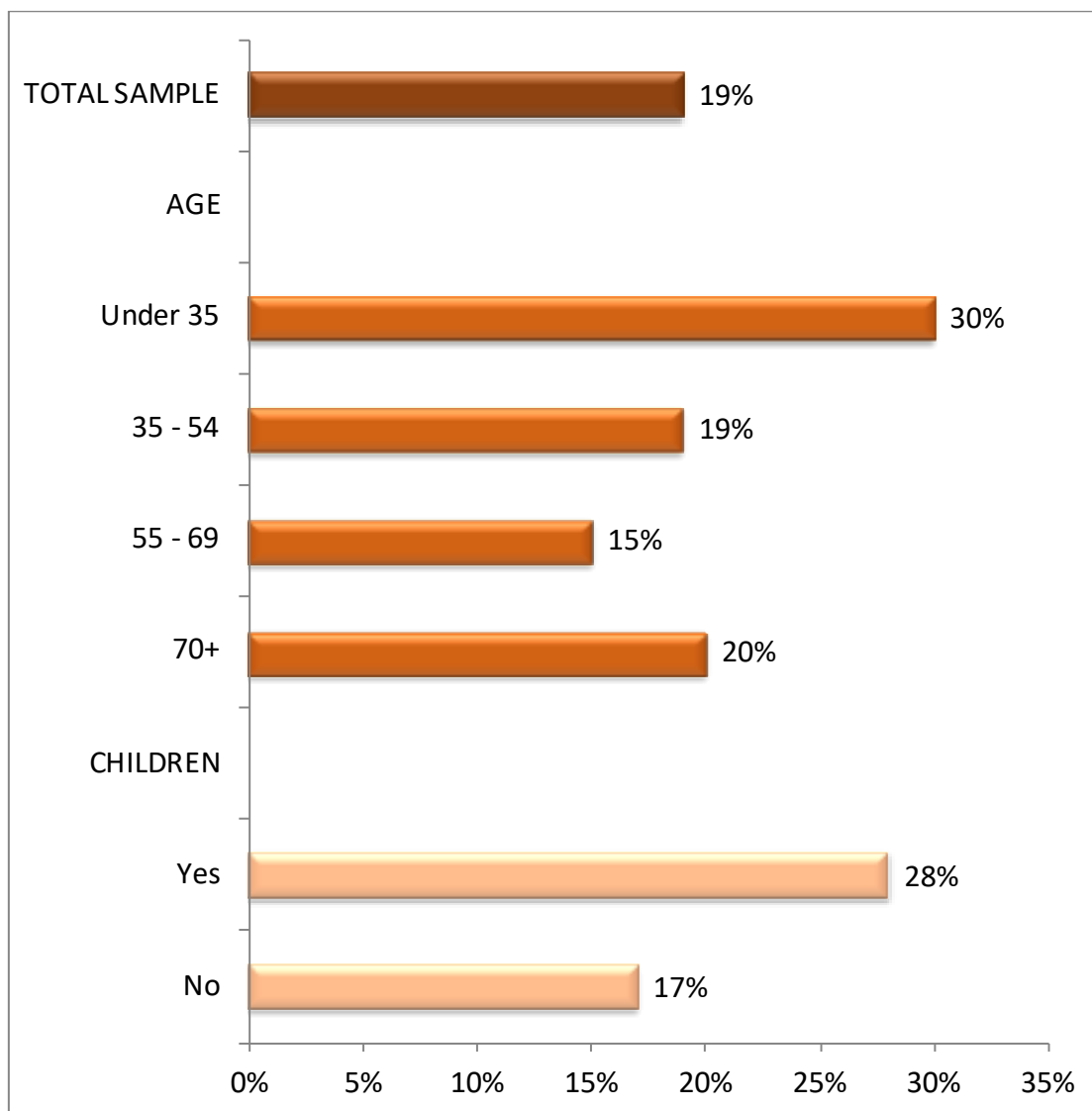


Base: Total member sample (244).

Question: Are there specific facilities, services or programs that you or a family member is interested in, that are not offered at your Y, that you wish were?

- Members most likely to claim to have unmet needs are below the age of 35, and have children or teens living in their homes. Hence, as seen previously, they are less likely to be very satisfied.

***Unmet Healthy Living Needs
(Not Addressed by the Y)***

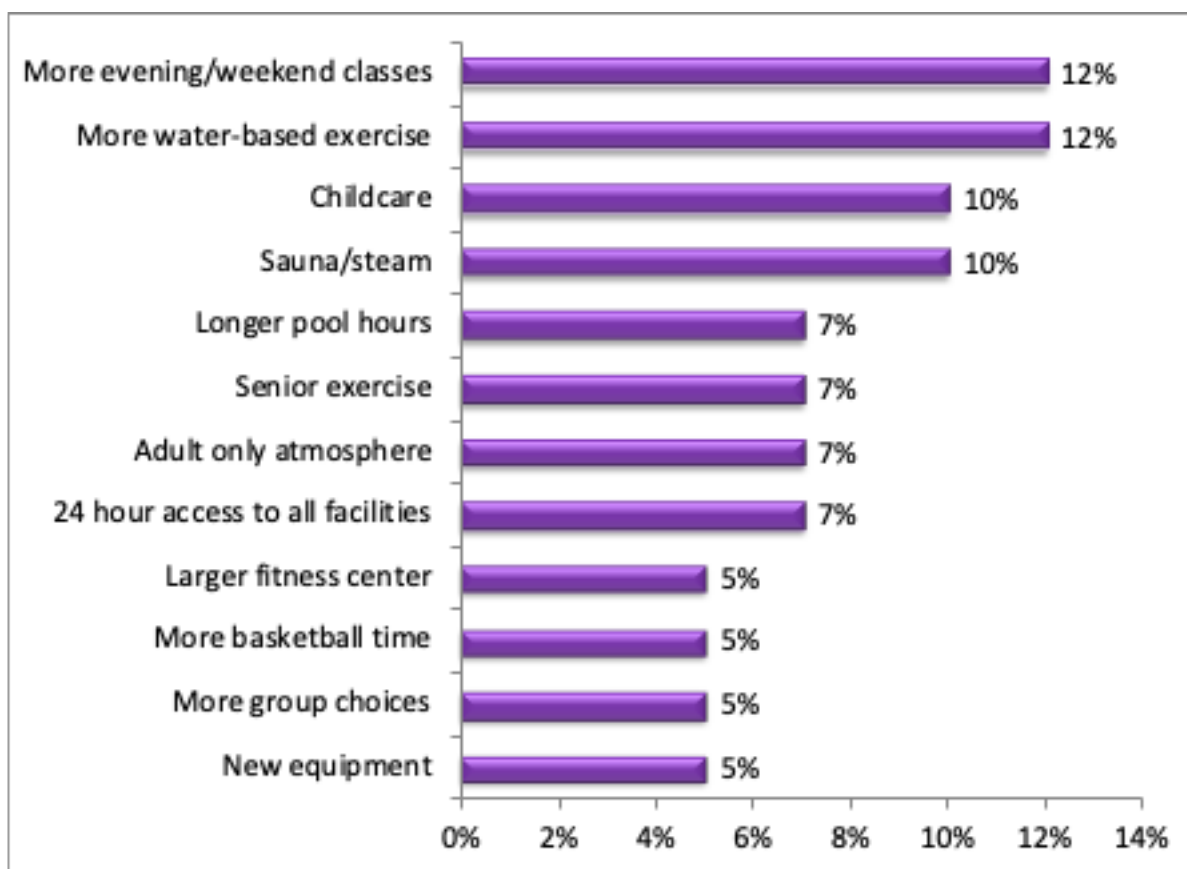


Base: Total member sample (244).

Question: Are there specific facilities, services or programs that you or a family member is interested in, that are not offered at your Y, that you wish were?

- When asked, on an unaided basis, what specifically they are seeking and not finding at the Owensboro Family YMCA, the most common responses focus on:
 - More evening and weekend classes.
 - More water-based exercise.
 - Childcare.
 - Sauna/steam.

***Unmet Needs
(Unaided)***



Base: Members with unmet needs (41).

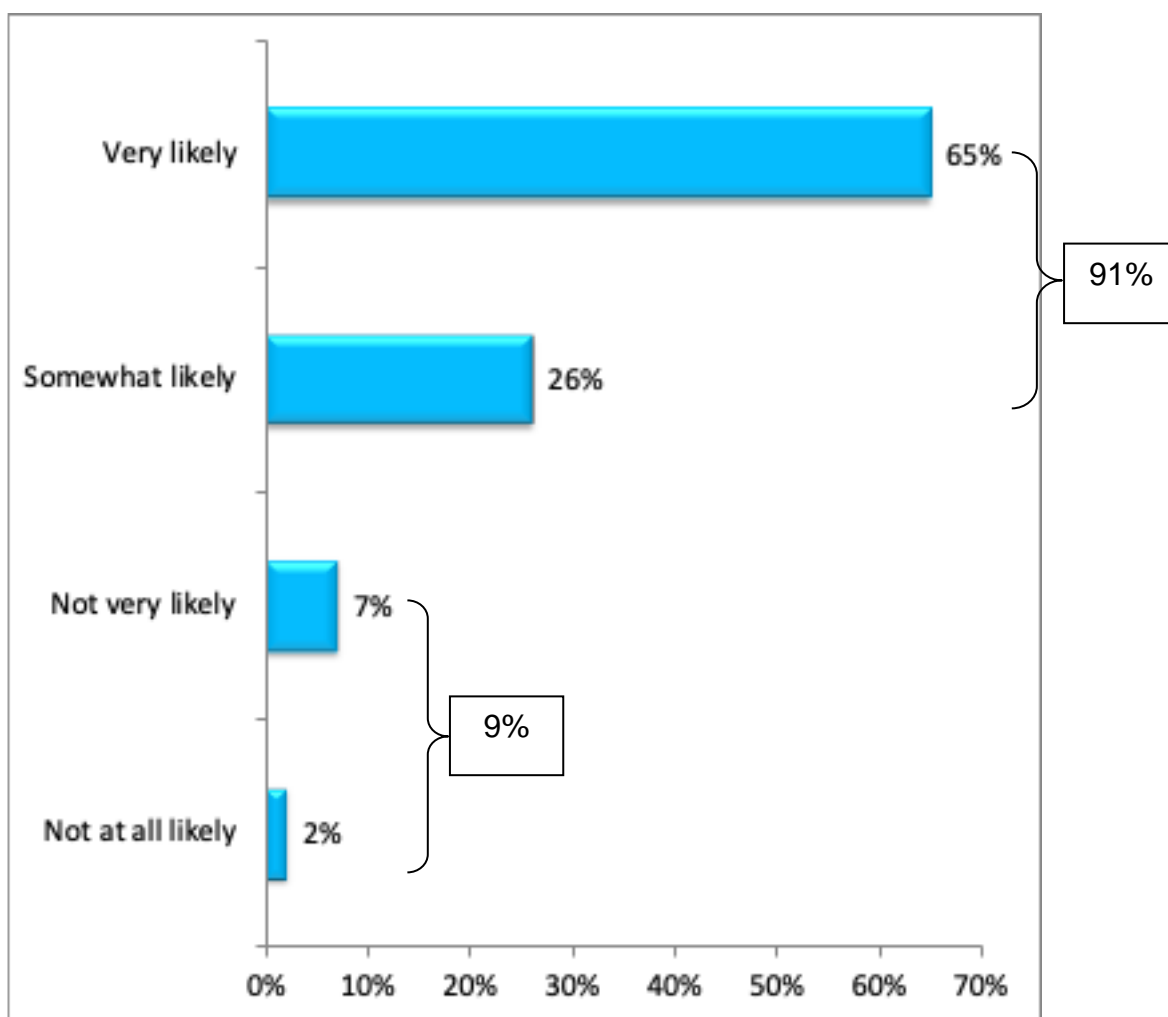
Question: What specific facilities, services or programs do you wish the Y offered that are not currently available?

NOTE: Chart includes topics mentioned by 5% or more of the respondents.

III. YMCA Membership

- At present, with no changes to the facilities or programming, 65% of Owensboro Family YMCA members claim to be very likely to remain Y members for at least the next 12 months.
- An additional 26% are somewhat likely to remain Y members.
- Nine percent (9%) of members claim to be not very (7%), or not at all likely (2%) to remain a Y member for at least the next 12 months.
- Silver Sneakers (75%) are significantly more inclined to be very likely to remain members than are either household (56%) or individual (59%) members

Likelihood of Remaining a YMCA Member

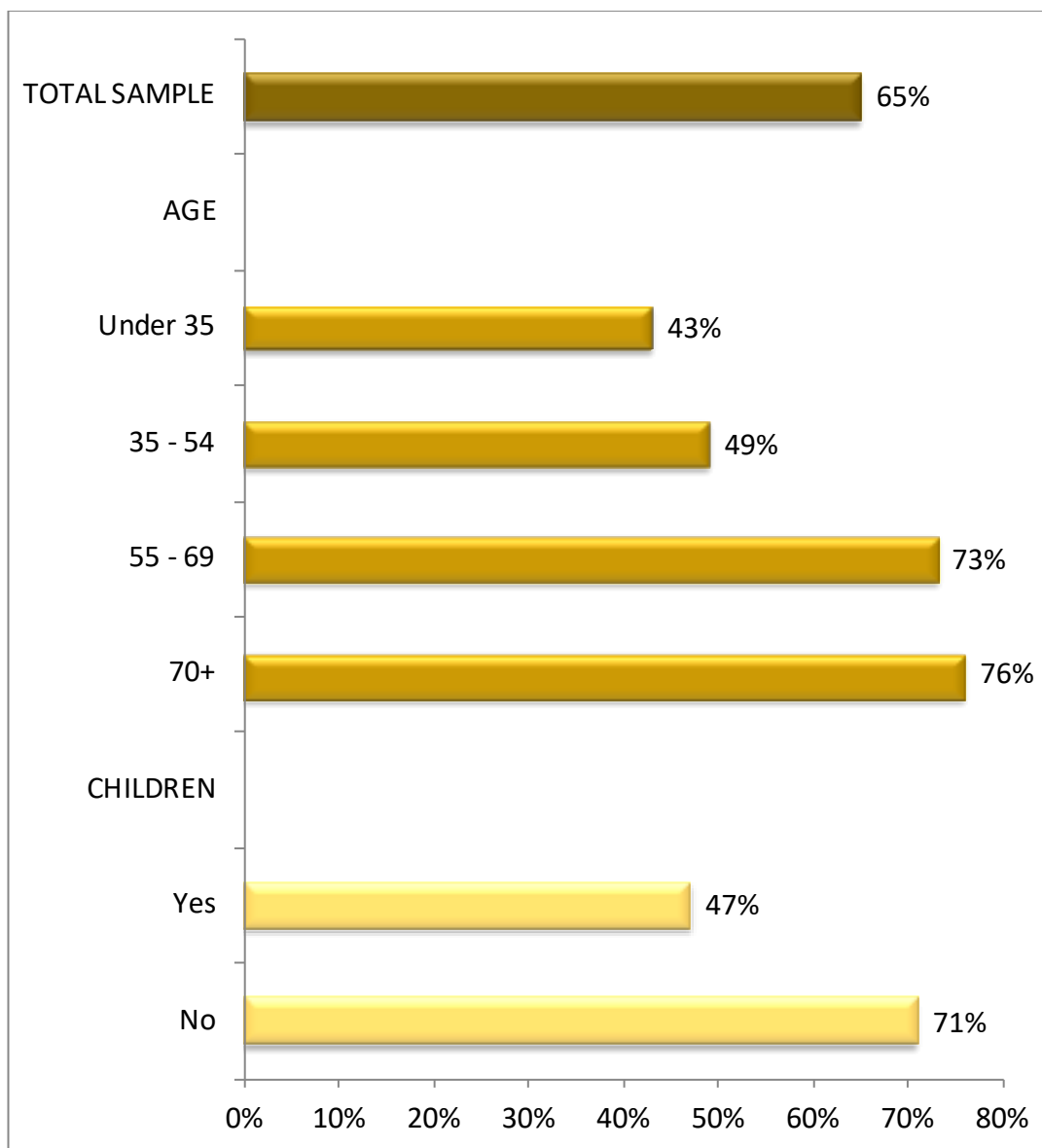


Base: Total member sample (244).

Question: How likely is it that you will remain a member of the YMCA for least the next 12 months?

- The Owensboro Family YMCA is most susceptible to membership loss among those under the age of 55. These are the same members least likely to be very satisfied, most likely to have unmet needs and also are not Silver Sneakers.

***Likelihood of Remaining a YMCA Member
% Very Likely***



Base: Total member sample (244).

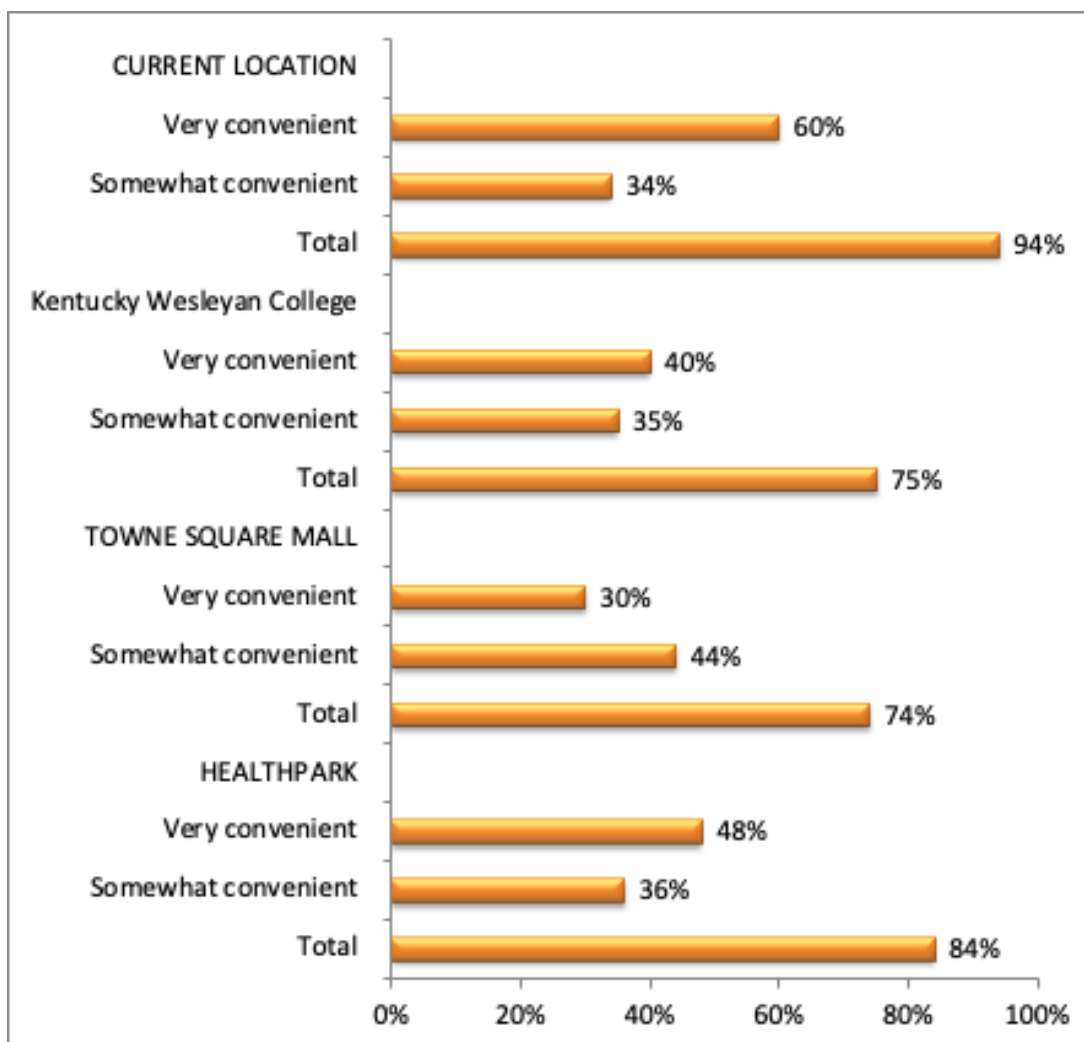
Question: How likely is it that you will remain a member of the Y for least the next 12 months?

IV. Convenience of Alternative Sites for a New YMCA

Members were asked to indicate how convenient each of four potential sites for a new/re-imagined YMCA would be for usage by their household members. These sites are the same as those presented to area residents:

- The current site of the Owensboro Family Y is considered convenient by more members than any other test locations.
- Healthpark is perceived as convenient by more current Y members than is either Towne Park Mall or the Kentucky Wesleyan College campus.

Convenience of Potential Sites



Base: Total member sample (244).

Question: How convenient would a relocated YMCA into a new building on the Kentucky Wesleyan Campus be for your use?

How convenient would a relocated YMCA into the Towne Square Mall be for your use?

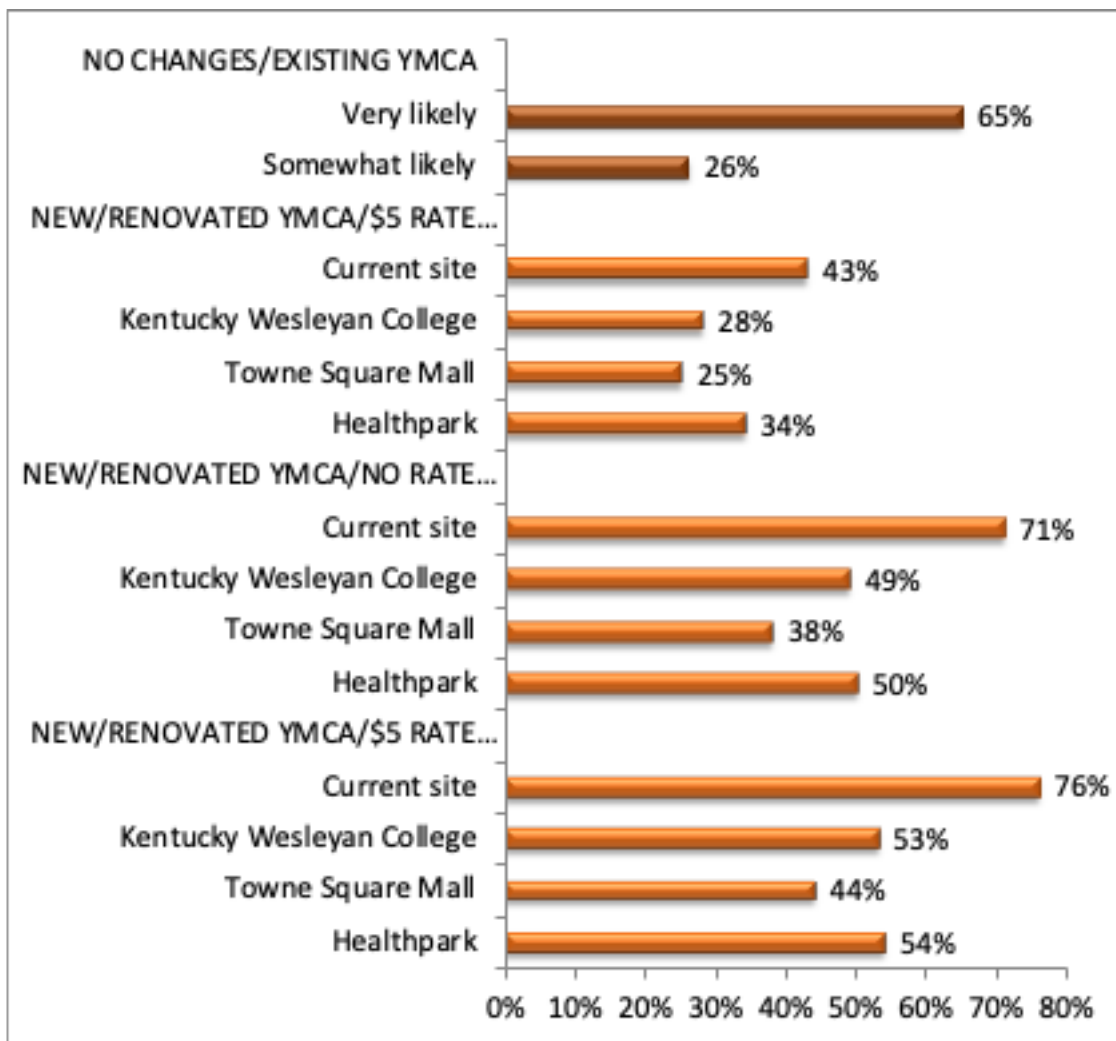
How convenient would a relocated YMCA at Healthpark be for your use?

V. Likelihood of Remaining a Member

Members were asked how likely they are to remain a YMCA member if a new or renovated YMCA were to open. They were asked this question for each of the four locations, and, if their monthly membership rates increased by \$5 per month, if there was no increase in monthly fees, or if fees decreased by \$5 per month.

- In general, it can be concluded that members want a new or improved YMCA, but do not want to pay more per month than what they are currently charged to get this new YMCA.
- The data also shows that members are most comfortable with the idea of a renovated Y at the current location. That is, more members will remain members if the current site is renovated versus a new building or build out (Towne Square Mall) elsewhere.
- Of the sites being considered, Towne Square Mall is of least interest to current members. That is, regardless of price, fewer members claim they will remain with the Y if it moves to Towne Square Mall than at any of the other potential locations.

Likelihood of Remaining a Member



Base: Total member sample (244).

Question: If after the Covid-19 pandemic is resolved, the Owensboro Family YMCA moves into a new building or is renovated, and if the cost of your membership increases by \$5 per month from what it is today, will you _____ remain a member of the new Owensboro Family YMCA?

And if the cost of your membership at the new Y is the same as it today, how likely is it you or someone in your household will remain a member of the new/renovated YMCA?

And after the Covid-19 pandemic is resolved, if the Y is completely renovated and the cost of your membership becomes \$5 less per month than what it is today, will you _____ remain a member of the Owensboro YMCA?

VI. Reaction to Statements

Current Y members:

- Are much more interested in participating in classes at a new Y (89%) rather than at churches or other spaces throughout the community (11%).
- Believe Owensboro and Daviess County deserve a better Y than what they now have (94%).
- Believe (78%) the City and County should use taxpayer funds (40% completely agree, plus 38% somewhat agree) to help build a better YMCA. This is in contrast to the opinions of those area residents, who are not Y members, of which only 30% think that taxpayer money should be used to help build an improved YMCA.
- Most (77%) may donate \$25 to help build and operate a better YMCA (45% completely agree, plus 32% somewhat agree).
- Think (89%) that, if the Y were to close, many residents would not be able to find programs and services they need (66% completely agree, plus 23% somewhat agree).
- Almost unanimously believe (95%) the Owensboro Family YMCA makes Owensboro and Daviess County a better place to live (77% completely agree, plus 18% somewhat agree).