

## Olympic Peninsula YMCA Community Survey Results Summary

### Executive Summary

#### Survey Methodology

In September 2015, the Olympia Peninsula YMCA, along with the Sequim Aquatic Recreational Center (SARC), Olympic Medical Center, Clallam County, Sequim School District and private donors commissioned Strategic Research Associates to conduct a mixed mode telephone and online survey of community members and existing SARC members to evaluate their perceptions of a SARC/YMCA collaboration that could potentially continue the operations of SARC.

This research effort included three concerted efforts in order to collect responses from as many community population subsets as possible—an RDD cellular and landline telephone effort to reach non-member respondents, a telephone effort to existing SARC members, and an online survey which was publicized through local news, radio, and outreach efforts.

Interviewing began October 7 and ended October 30, 2015. To reach a targeted contact, Strategic Research interviewers attempted up to 4 call attempts per targeted phone number. Most interviews were conducted between 4PM and 8PM on weekdays and between 10AM and 4PM on weekends. Some interviews were administered during the day to reach those difficult to find in the evening.

The survey included 85 questions and took an average 10 to 13 minutes to complete.

- A telephone survey with an average length of 13.5 minutes was fielded among 1,085 SARC members and petition signers between October 8 and October 21, 2015—resulting in 245 responses collected among SARC members.
- A 10 minute best effort telephone survey was fielded among RDD cellular and landline targets within the Sequim zip code of 98382 between October 8 and October 29, 2015—resulting in 404 responses collected.
- A combined survey instrument was publicly hosted and available to collect survey responses between October 7 and October 30, 2015—resulting in an additional 400 SARC member and 384 non-SARC member responses.

#### Research Objectives

- Explore the impact of various Family, Adult, Young Adult, and Youth membership fee unit levels on the likelihood of joining the proposed collaboratively managed SARC / YMCA
- Measure the effects of new membership unit pricing and membership unit types of the re-enrollment of current SARC members
- Project the number of adult and family memberships the SARC/YMCA can expect

- Determine the range of membership fees that are optimal to maximize unit sales
- Assess the value of the YMCA brand and YMCA brand awareness within the community

### Key Findings

- The overwhelming online response from the community both reduces the number of telephone interviews we are typically able to collect, and also increased the statistical accuracy of online survey results – very few statistically significant differences can be found between the two sample populations
- Most respondents (69%) are supportive of the YMCA presenting a proposal to manage SARC regardless of their interest to join
- 51.36% of the respondents had either taken part in a program conducted by the YMCA or been a member of a YMCA location in the past.
- The pattern of results seen for current members and non-members of SARC is similar; 56.8% of respondents would prefer to join using one or more individual adult memberships while 38.7% of respondents indicated that they would prefer a family membership
- Young adult memberships for those aged 19-25 appear to appeal to current non-members and may be a good way to introduce the facilities to new young adults, but very few respondents indicated any interest at all in young adult memberships
- 81.7% of respondents who indicated that they would prefer a family membership are either “Definitely” or “Probably” going to join the proposed SARC/YMCA facility
- 66.2% of respondents who indicated interest in one or more adult individual memberships are either “Definitely” or “Probably” going to join the proposed SARC/YMCA facility
- Adult individual memberships are the most popular choice among the community, and also exhibit the highest price sensitivity—about 64.5% of respondents chose the high and mid price points, including the \$45 per month price point increases that number to 86.86%
- Price sensitivity among respondents shows us that sales volume will increase by—
  - 14% at the lowest membership unit pricing of \$65 per 2 adult family vs. 2 adults for \$75 per month.
  - 11% at the lowest membership unit pricing of \$45 per 1 adult family vs. 1 adult family for \$55 per month.
- Prior to evaluating fees, 69.31% of respondents indicated that at least one member of their household was either “Probably” or “Definitely” going to join, with another 11.2% sitting on the fence.

- The discussion of fees and membership options increased the percentage of respondents indicating that at least one member of their household was either “Probably” or “Definitely” going to join to 74.31%, with an increase of 19.61% now sitting on the fence.
- Existing SARC members were a little less enthusiastic about joining after evaluating fees as the percentage of those “Definitely or “Probably” dropped minimally from 88.3% to 82.99%
- Non-members on the other hand, slightly increased their interest to join after reviewing fees as the percentage of those “Definitely” or “Probably” increased to 64.05% from 53.5%
- Total membership revenue opportunity is limited based on the population of Sequim; but we estimate total revenues from memberships alone to be between \$73,000 and \$82,000 monthly once all interested in the population have enrolled
- When we evaluate respondent’s interest in joining and assume that towards the population of Sequim - we estimate between 10 and 12.4% of the population is interested in joining.
- Donating to the YMCA also has strong support, with 30% of SARC members and 23% of non-members either “Definitely” or “Probably” interested in supporting the YMCA’s scholarship program
- Cardiovascular equipment, a pool for recreation and open swimming, machine weights and strength equipment, a pool for lap swimming, a warm water therapy pool and Yoga, Pilates, Zumba classes are the most appealing features to respondents

## Demographics

- The distance from their home to the corner of 5<sup>th</sup> and Hendrickson is 15 minutes or less for 83.78% of the respondents
- Respondents were predominantly 65 or older in age and 23.66% of respondents had children aged 18 or younger currently living with them
- 592 (49.5%) of all respondents had an adult family member aged 19 or older at home who was a paying member of any organization providing indoor exercise facilities