



Marketplace Intelligence

***Research for the City of Reynoldsburg:  
Residents' Reaction and Willingness to  
Support a New Healthy Living Community  
Center***

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**PB&A Marketplace Intelligence**

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## **Objectives**

The primary purpose of this study is to provide unbiased data to the City of Reynoldsburg and the YMCA of Central Ohio regarding the scope of opportunities and challenges for new recreational programming and healthy living facilities in Reynoldsburg. Specifically, this research estimates membership demand (in member units) and program participation for a proposed new community center.

A key component of this research is to determine residents' reaction to this healthy living center being managed and programmed by the YMCA as a branch of the YMCA of Central Ohio.

The following information was gathered and analyzed:

- An assessment, on an unaided and aided basis, of community needs and wants in terms of health, recreation, sports, and related youth programs that can be offered by the new community center.
- The relative demand and desire for specific facilities (gym, pool, wellness center, etc.), programs (group exercise, diet and weight loss, etc.) and areas of focus (parent/child, youth development, disease/injury prevention and recovery, etc.) from this healthy living community center/YMCA, and a rank ordering of the extent to which each will/will not contribute to growth in membership/usage.
- Determination of whether the Reynoldsburg community can sustain a new center of this nature, and the impact having this center run by the YMCA will have on likely membership/usage.
- Projected demand and price elasticity of demand for this new facility. That is, what impact will cost have on membership/usage.
- Using a proven model and the primary data collected in this research, the number of member units/usage this new facility can anticipate based upon potential specific offerings.
- Reaction to the proposed location for this new community asset.
- Establish how programs should be priced and or bundled/unbundled relative to the cost of membership.
- Identification of other factors that may help or hinder the success of this new facility.
- Residents' willingness to support a tax increase.

PB&A believes that by completing this study carefully, the resulting data is of great value to the City of Reynoldsburg regardless of whether the ultimate decision is to move forward with construction of a new healthy living community center and whether or not the decision is to partner with the YMCA.

## Study Approach

This research was completed as follows:

**Phase One:** A review of secondary demographic and psychographic information. This review included data from a variety of sources including the City of Reynoldsburg, the YMCA of Central Ohio, Y-USA, SEER Analytics, and SDR, among others.

**Phase Two:** Two focus groups, moderated by Phil Balducci.

- **Group One:** The first focus group was composed of City staff, volunteers, and board members responsible for the planning and execution of this study. An important goal of this conversation and the second focus group was to issues and concerns.
- **Group Two:** The second focus group was composed of formal and informal community leaders from Reynoldsburg who may or may not be friends of the YMCA, but who are important within the City.

**Phase Three:** Completion of 400 telephone interviews with a random sample of area residents who live within the estimated primary market area of the proposed new community center.

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

The calling plan for Phase Three 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 during February 2016 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 email survey to capture an adequate share of residents who rely only on their mobile device and no longer have a landline telephone. It is important to note that the quality of sample available for this type of email survey varies significantly from location to location, but it appears that we were able to purchase a sufficiently high quality sample of the approximate PMA.

Phase Four: Completion of 753 online interviews with Y members at Gahanna Branch of the YMCA (543 complete interviews) and the Garver Branch of the YMCA (171 complete interviews), plus 39 additional interviews with Y members who joined at one of these two branches but now claim to use another YMCA location most often.

## Executive Summary

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

- If the City of Reynoldsburg desires to open and operate a successful Community Center, what it decides to charge people to become members and/or access the facility on a daily basis will have a significant impact on its likelihood of initial success and sustainability.
- If the monthly cost of membership to the Reynoldsburg Community Center is \$75 for a family or \$45 for an individual, it is predicted that 309 full pay member units will be attracted within the first year. Residents are price sensitive, and many of those who are interested in belonging to the new Community Center believe these rates are too high.
- At monthly membership fees of \$65/\$39, significantly more households are likely to join in the short run (1,697)
- And if fees are lowered to \$49/\$29 per month, 2,883 member units should be achieved within the first 12 months.
- If members of the new Reynoldsburg Community Center are offered unlimited access to all of the branches of the YMCA of Central Ohio, the number of local households predicted to join increases at each tested price level.

### **Price Elasticity of Demand: Incremental Full Pay Member Units**

	<b>Just Community Center (#)</b>	<b>Unlimited YMCA Branch Access (#)</b>
<b>At \$75/\$45</b>	309	343
<b>At \$65/\$39</b>	1,697	1,884
<b>At \$49/\$29</b>	2,883	3,200

Base: Total sample (400).

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- In addition, deciding to have the Community Center managed as a branch of the YMCA of Central Ohio assures a substantially higher number of full pay members from those who already belong to the Y. It can be conservatively estimated that at least an additional 880 member units will transfer their usage from the Gahanna YMCA (407) and the Garver Branch (473) soon after the new Reynoldsburg Community Center opens.
- Of thirteen specific key features that could be incorporated into a new community center, those that will attract the greatest interest and usage are:
  - Aquatics.
  - An indoor walking/running track.
  - Multiple exercise studios.
  - A state-of-the-art fitness/cardio center.
  - A teen center.
  - A social area with healthy snacks.
- Of twenty three tested classes and programs, those of greatest interest are:
  - Water-based exercise.
  - Lap swimming.
  - Pilates, Zumba, yoga.
  - Programs that help children succeed in school.
  - Physical rehabilitation.
- If the vote were held today, 39% of the residents of Reynoldsburg, whose income taxes will increase, claim to be either very likely or somewhat likely to vote in favor of a 1% tax increase. Of these, 22% are “very” likely to vote in favor of the tax increase, and 17% are somewhat likely.
- Of nine tested statements, the two most likely to sway additional voters whose taxes will be impacted are:
  - In addition to the community center, the increase in taxes will help fund park improvements, Senior Center updates, as well as road and infrastructure repairs.
  - Reynoldsburg residents will be given a discount on access to the facility, versus non-residents.
- If a \$10 per person day pass is available, 11% of those unlikely to join as a member claim they will access the Community Center with this type of pass.
- If the cost of a day pass is \$10, it appears additional area residents may decide to join the Community Center/YMCA as members. That is, if a per-person day pass is \$10, the monthly cost of membership appears to be a better value to 18% of area residents, who previously claimed they are less than very likely to join.

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- If the cost of a day pas is \$5 per person per day, a greater percentage of area residents (31%) claim they will access the Community Center with a day pass versus joining as a member.
- For the most part, those area residents who claim they will access the Community Center via a day pass, if the cost is \$5, who were not likely to do so when the cost of a day pass was \$10 are people who otherwise claim they would not use the Community Center. That is, the percentage who claim they will neither pay the daily rate or join as a member drops from 70% at a day rate of \$10 to 55% when a day pass costs \$5.

## **Detailed Findings: Residents of Reynoldsburg and Surrounding Communities**

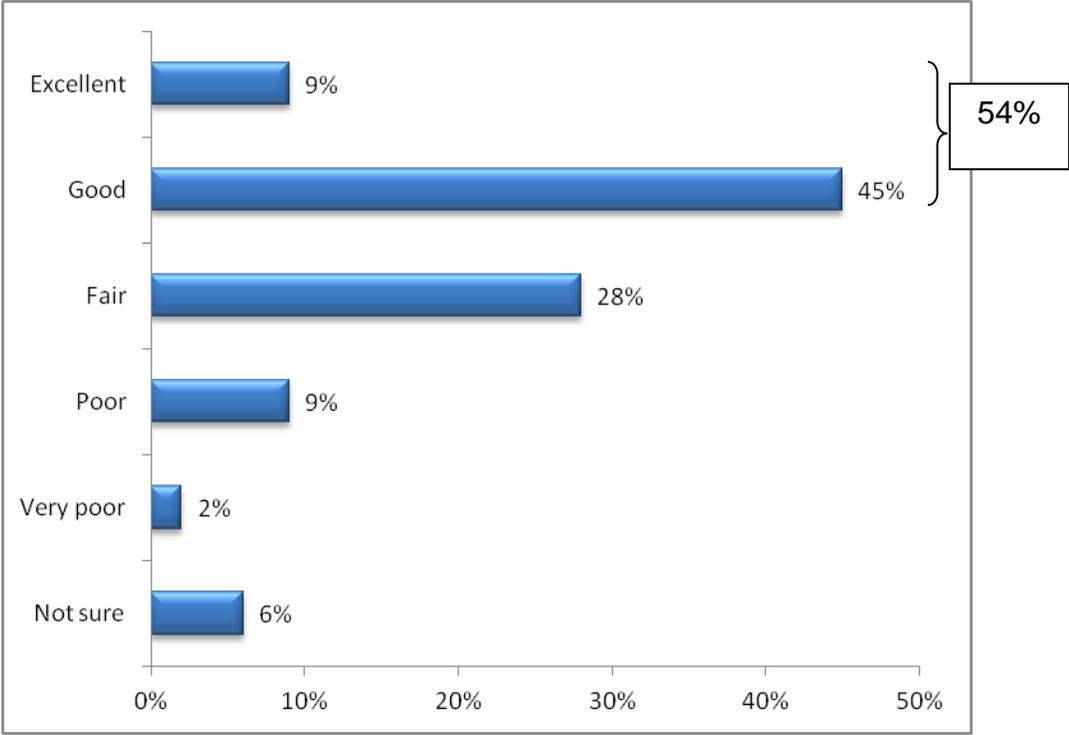
# I. Living in Reynoldsburg

The findings presented in this section of the research are based upon 400 complete interviews with a random sample of residents who live within Reynoldsburg and the surrounding communities.

The first question asked to respondents was simply to rate Reynoldsburg as a place to live.

- One out of ten (9%) of those who live in and around Reynoldsburg rate Reynoldsburg as an “excellent” place to live.
- An additional 45% claim Reynoldsburg is a “good” place to live.

**Rate Reynoldsburg as a Place to Live**

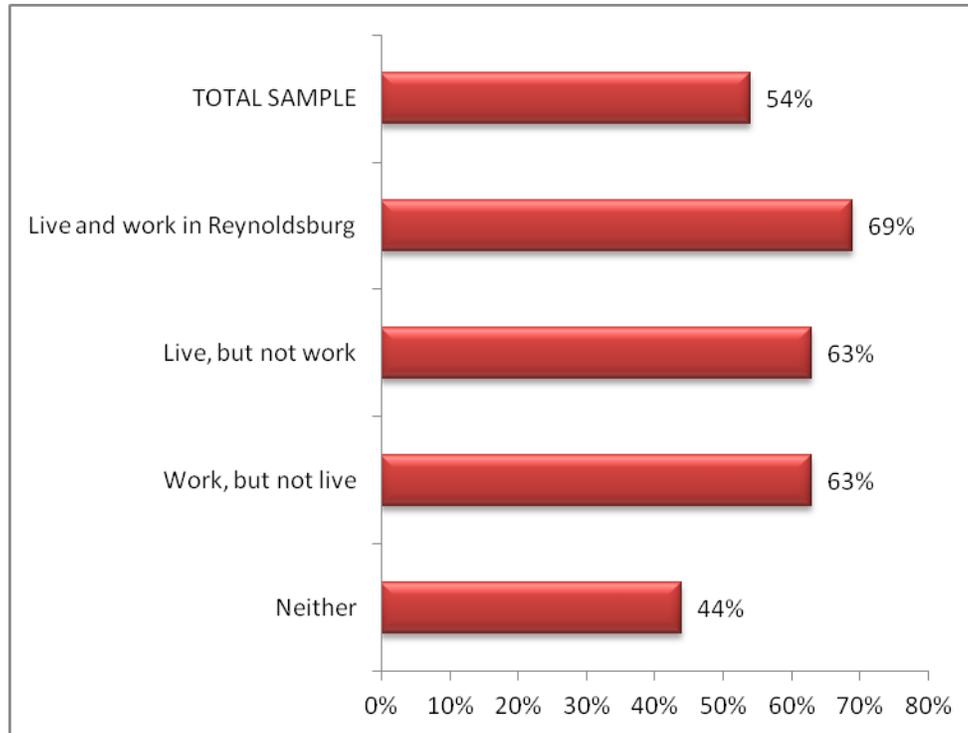


Base: Total sample (400).

Question: Overall, would you say Reynoldsburg is a [READ SCALE] place to live?

- The respondents who both live and work in Reynoldsburg are the most likely to perceive the city as an excellent or good place to live.

**Reynoldsburg is a Good/Excellent Place to Live  
% Excellent or Good**



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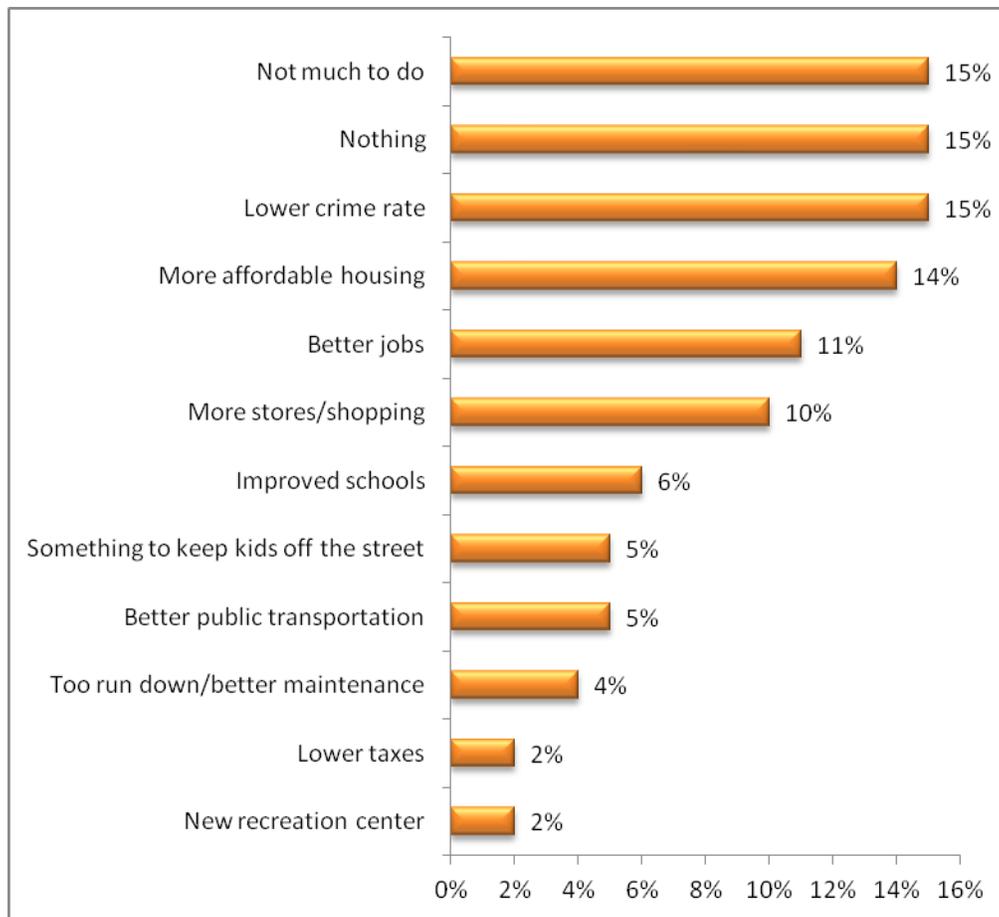
Base: Total sample (400).

Question: Overall, would you say Reynoldsburg is a **[READ SCALE]** place to live?

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- When respondents were asked, on an unaided basis, what change or improvement they believe would make Reynoldsburg a better place to live, the most frequent responses include:
  - Not much to do.
  - Nothing (no changes are wanted or needed).
  - A lower crime rate.
  - More affordable housing.
- Two percent of those polled volunteered that they believe a new community center would cause Reynoldsburg to become a better place to live.

***Desired Change or Improvement  
(Unaided)***

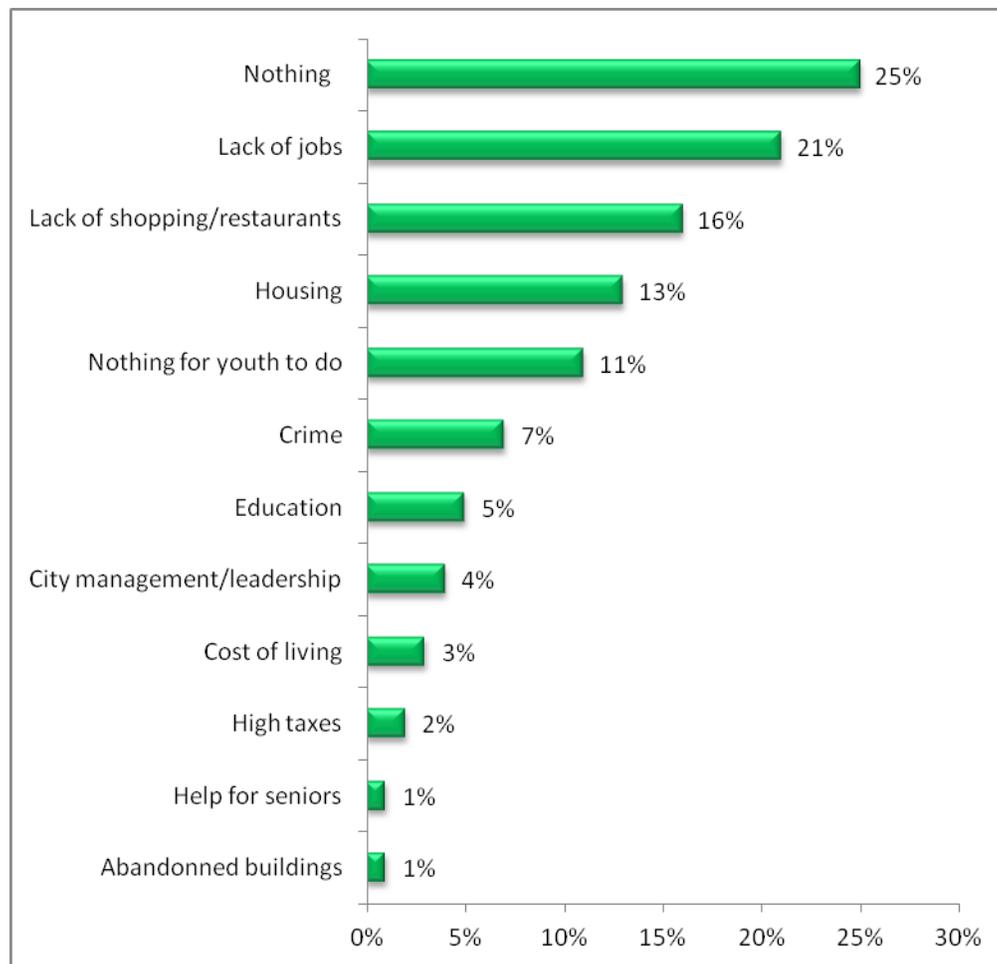


*Base: Total sample (400).*

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

- Respondents were also asked what they believe to be the biggest Issue facing Reynoldsburg. The answers to this question closely correspond to the topics in the previous chart regarding what change would most improve Reynoldsburg.

**Biggest Issue Facing Reynoldsburg (Unaided)**



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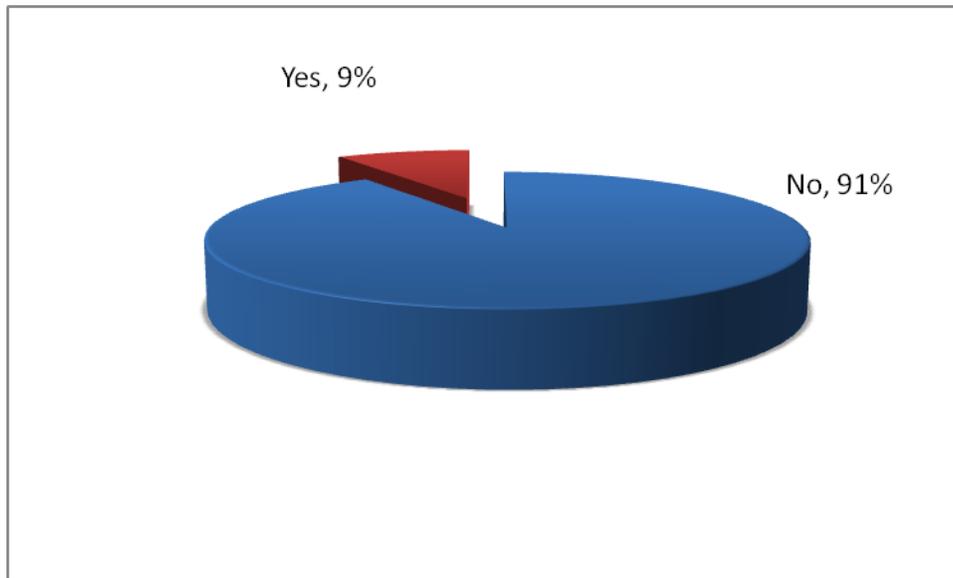
Base: Total sample (400).

Question: In your opinion, what is the biggest issue facing Reynoldsburg?

## II. Health Club/Recreation Center Membership

- One out of ten (9%) of the area residents polled for this research are members at some type of health club or recreation center. This is a very low percentage compared to what PB&A typically observes in this type of study. The YMCA is not considered a health club or recreation center.

### ***Health Club/Recreation Center Membership***



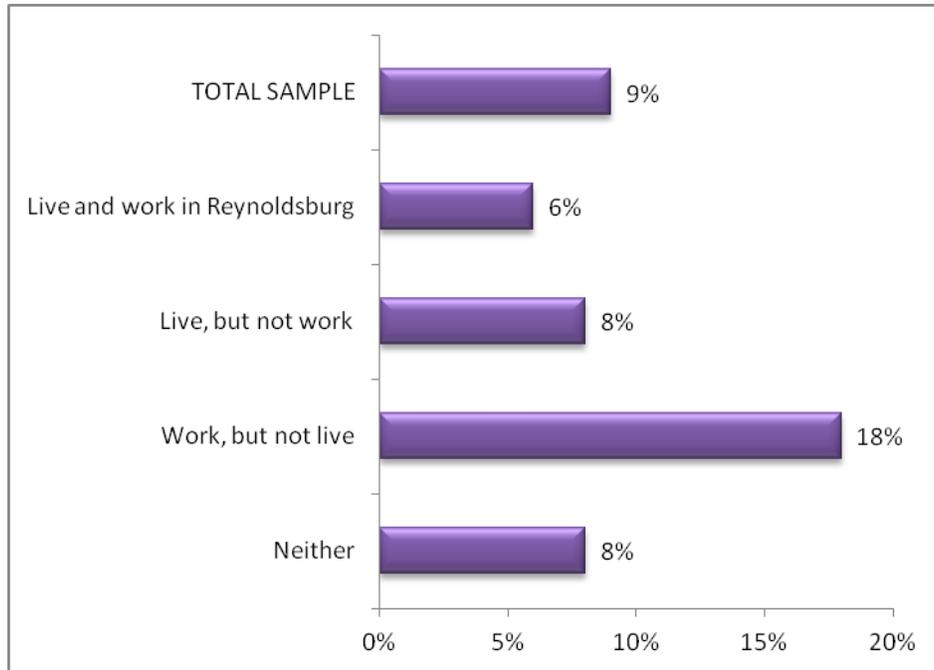
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Base: Total sample (400).

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

- Respondents who live in Reynoldsburg are less likely than those from surrounding communities to belong to a health club or recreation center.

**Health Club/Recreation Center Membership  
% Yes**



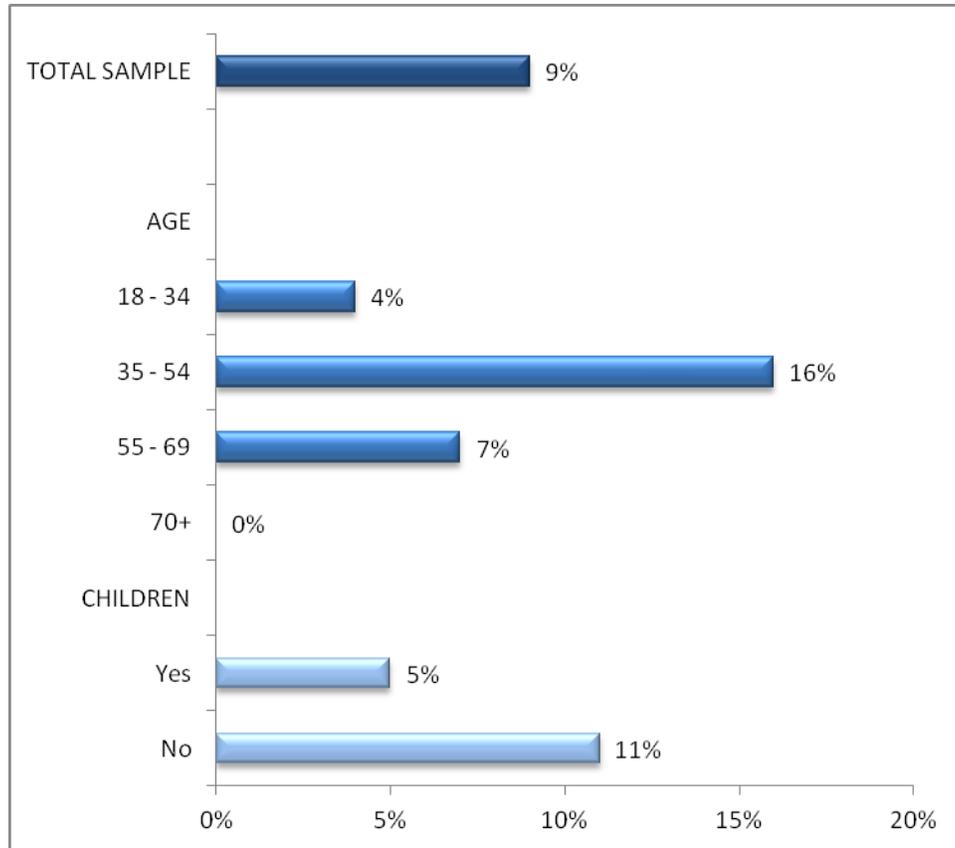
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Base: Total sample (400).

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

- Area residents between the ages of 35 and 54 are more likely than both their younger and older neighbors to belong to either a health club or recreation center.

**Health Club/Recreation Center Membership –  
% Yes**



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Base: Total sample (400).

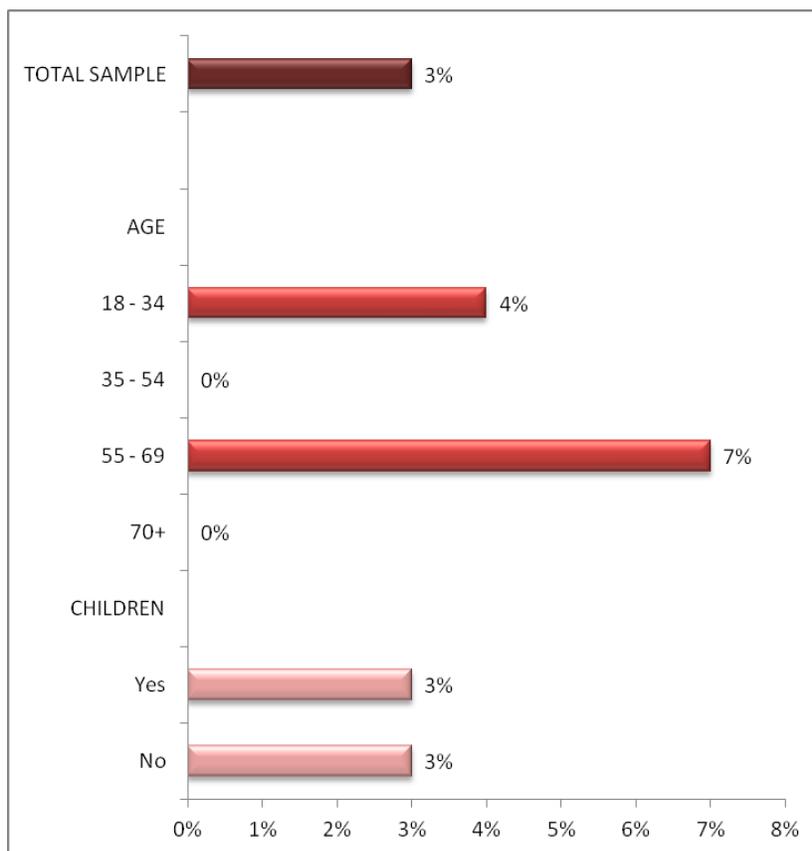
Question: Do you currently belong to a health or fitness club, or a recreation center in the area?

### III. Unmet Needs

Reynoldsburg area residents were asked whether or not they have any unmet needs or wants in terms of healthy living, sports, exercise, or recreation for which they have not found an acceptable source.

- Respondents, for the most part, do not believe they have unmet needs or wants in terms of healthy living, sports, exercise, or recreation. Only 3% claim to have this type of unmet need.

#### **Unmet Needs % Yes**



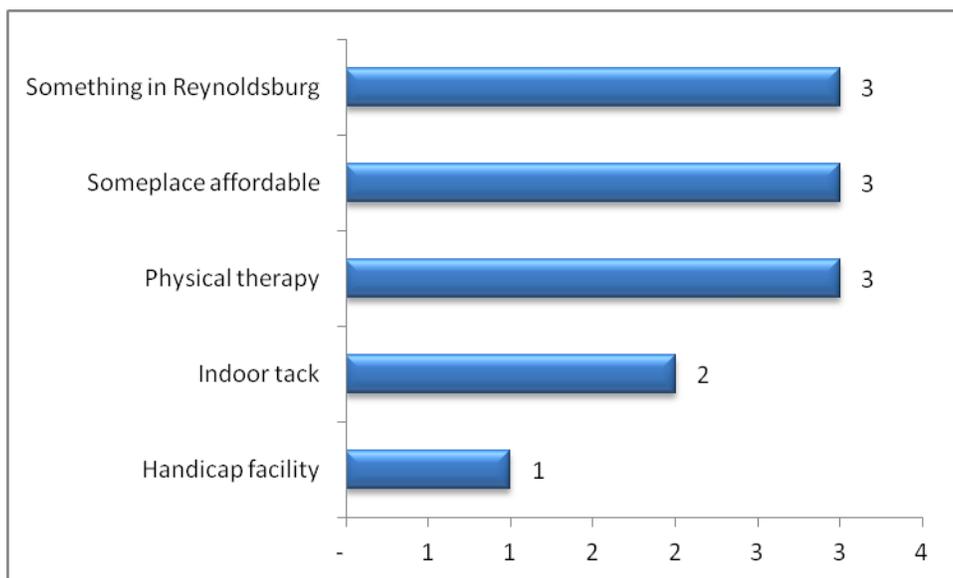
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Base: Total sample (400).

Question: In the past year, has anyone in your home looked for healthy living, fitness, or recreational activities to participate in, and not found a satisfactory answer?

- When those with unmet needs are asked specifically what they are looking for and unable to find, the responses mentioned most often are “something in Reynoldsburg”, “something affordable”, or physical therapy. However, some caution is advised in drawing conclusions from this data due to the very small base size.

### **Unmet Needs (Unaided)**



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*Base: Area residents who have unmet needs (12).*

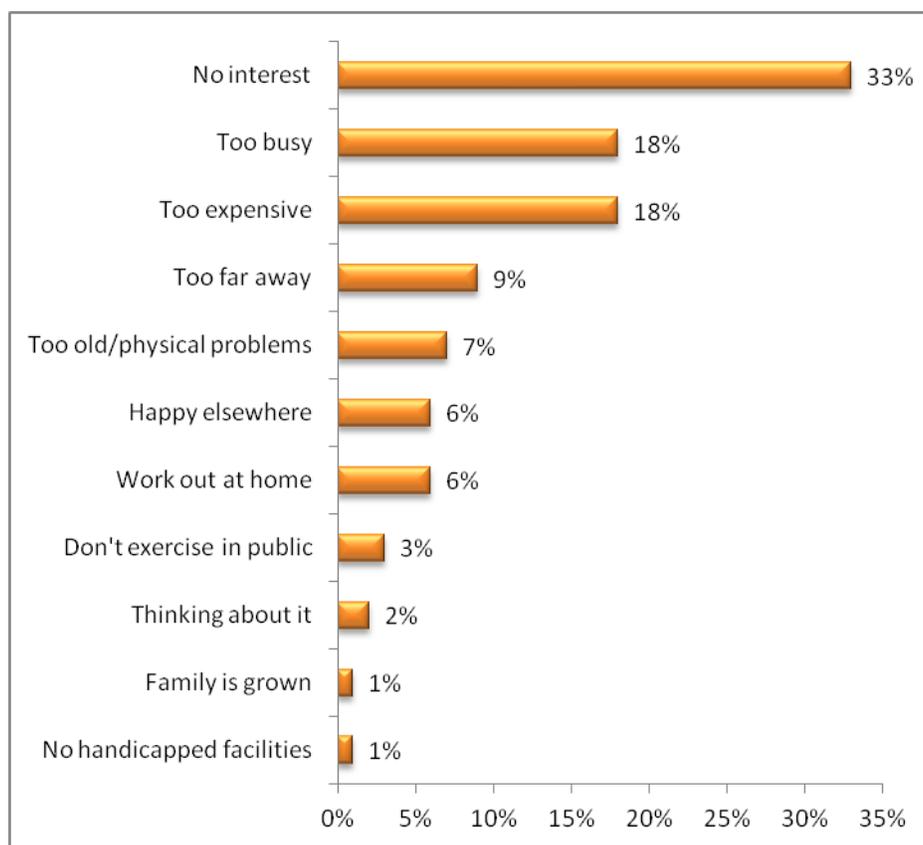
*Question: What is it that you are looking for and cannot find?*

*CAUTION: Small base size. Data presented as whole numbers.*

## IV. Reasons for not Being a YMCA Member

- When asked, on an open-ended basis, why they are not members of the YMCA, the most common reasons focus on:
  - Lack of interest.
  - Being personally too busy.
  - Cost.
  - Distance.

### ***Reasons for not Being a YMCA Member (Unaided)***



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Base: Total sample (400).

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

## V. Convenience of the Proposed Location for the New Community Center

Respondents were told that there is some consideration being given to opening a new community center in Reynoldsburg, across the street from City Hall, near the Senior Center and where the old pool is now located.

- This site is considered very or somewhat convenient by 88% of those who live and work in Reynoldsburg, and 75% of those who live but do not work in Reynoldsburg.
- Among those who work, but do not live in Reynoldsburg, only 9% perceive this location as very convenient, a full 55% see it as somewhat convenient.

### *Convenience of the Proposed Site*

	<b>Very Convenient (%)</b>	<b>Somewhat Convenient (%)</b>	<b>Not Very Convenient (%)</b>	<b>Not at all Convenient (%)</b>
<b>Total Sample</b>	20	36	19	25
<b>Live and work</b>	44	44	13	--
<b>Live, but not work</b>	42	33	17	8
<b>Work, but not live</b>	9	55	27	9
<b>Neither</b>	4	31	20	45

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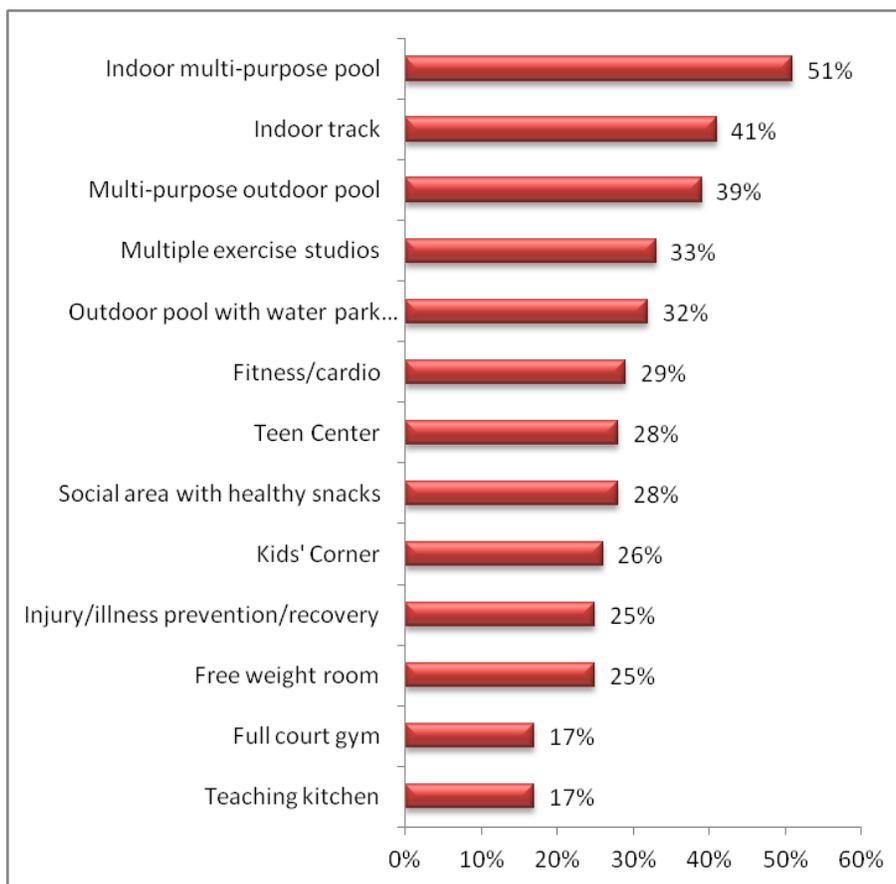
Base: Total sample (400).

Question: Overall, how convenient is this location for use by you and other household members?

## VI. Interest in Specific Features

- Respondents were presented with thirteen specific key features that could be incorporated into a new community center. Of these, those that will attract the greatest interest and usage are:
  - Aquatics.
  - An indoor walking/running track.
  - Multiple exercise studios.
  - A state-of-the-art fitness/cardio center.
  - A teen center.
  - A social area with healthy snacks.

### Likelihood of Using % Very Likely



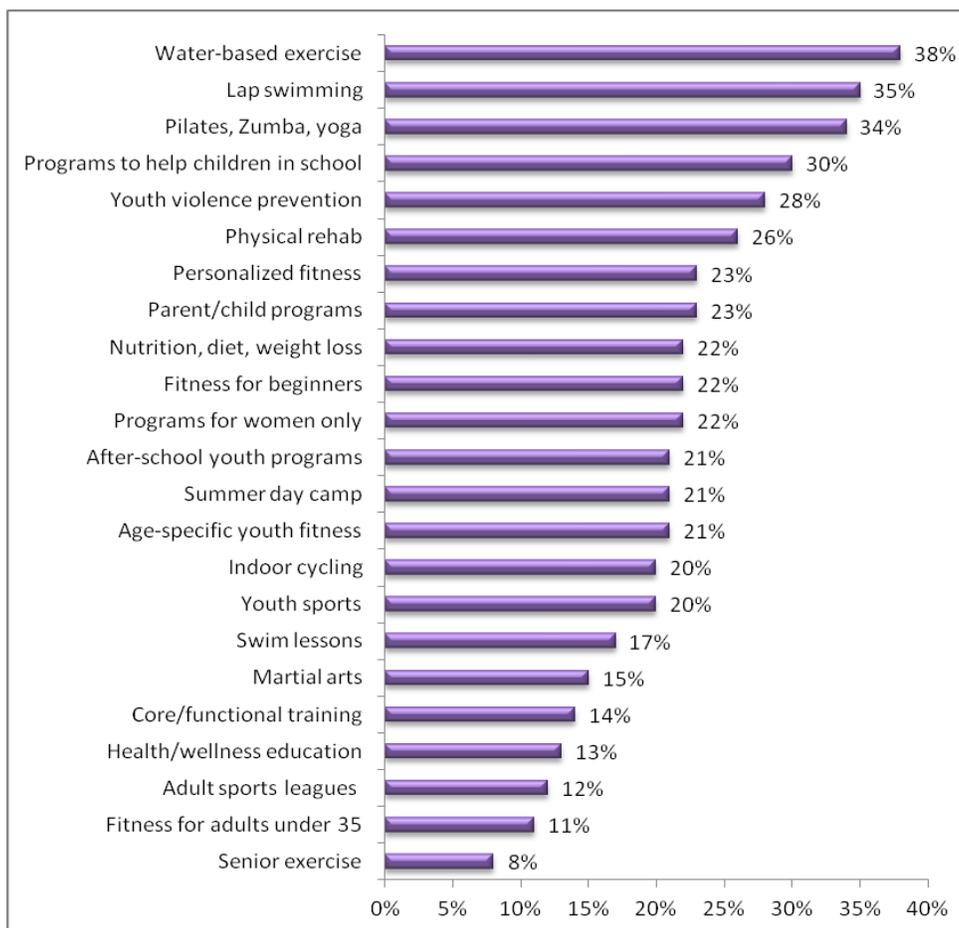
Base: Total sample (400).

Question: On a scale from 1 to 5, where 5 = very likely to use and 1 = not at all likely to use, how likely are you or are members of your household to regularly use each of these if offered at a new community center in Reynoldsburg?

Next, respondents were presented with a battery of twenty-three specific classes or programs typically offered by the YMCA and potentially available at the new community center. They were asked to indicate how interested they or other household members would be in participating in each.

- Of the tested programs, those of greatest interest are:
  - Water-based exercise.
  - Lap swimming.
  - Pilates, Zumba, yoga.
  - Programs that help children succeed in school.
  - Youth violence prevention.
  - Physical rehabilitation.

### ***Interest in Specific Classes and Programs % Very Interested***



Base: Total sample (400).

Question: On a scale from 1 to 5, where 5 = very interested and 1 = not at all interested, how interested are you or are members of your household in each of these programs?

## VII. Reaction to Opening a YMCA in Reynoldsburg

- When asked directly if opening the new community center as a branch of the YMCA in Reynoldsburg is a(n) excellent, good, fair, poor or very poor idea, just under one half (46%) of area residents claim it is either a good (22%) or excellent (24%) idea.
- One quarter (26%) believe opening the YMCA/Community Center is a poor or very poor idea.
- Those area residents with children living in their homes are more likely to consider opening a new community center in Reynoldsburg as a YMCA to be a good/excellent idea (67%) than are those without children (34%).

### ***Reaction to the Community Center as a YMCA Branch***

	Total (%)	Children	
		Yes (%)	No (%)
<b>Excellent</b>	24 <span style="border: 1px solid black; padding: 2px;">46%</span>	43 <span style="border: 1px solid black; padding: 2px;">67%</span>	13 <span style="border: 1px solid black; padding: 2px;">34%</span>
<b>Good</b>	22	24	21
<b>Fair</b>	24	19	27
<b>Poor</b>	13	5	17
<b>Very poor</b>	13	5	17
<b>Do not know</b>	4	3	5

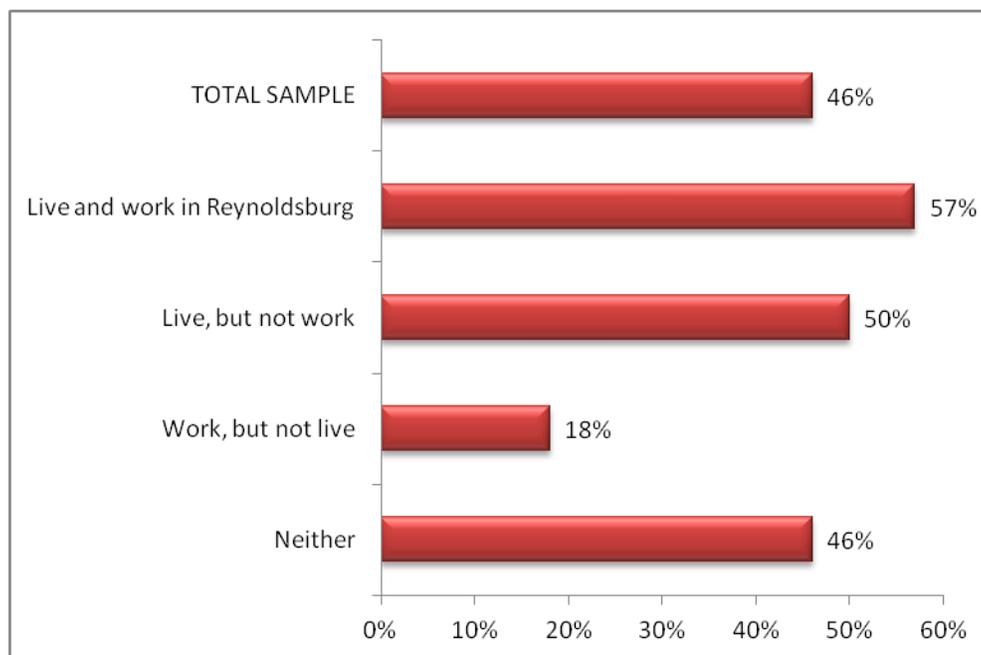
Base: Total sample (400).

Question: In your opinion is opening a new community center in Reynoldsburg that is a branch of the YMCA a(n) \_\_\_\_\_ idea?

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- When this data is examined by where a person lives and works, the following pattern can be seen.
  - Those who live in Reynoldsburg, regardless of whether they live and work in Reynoldsburg (57% excellent/good idea), or live but not work in Reynoldsburg (50% excellent/good idea) are more likely than those who work but do not live in Reynoldsburg to believe opening a Reynoldsburg Community Center as a branch of the YMCA is an excellent or good idea.

***Reaction to a New Community Center Being a YMCA  
% Excellent/Good***



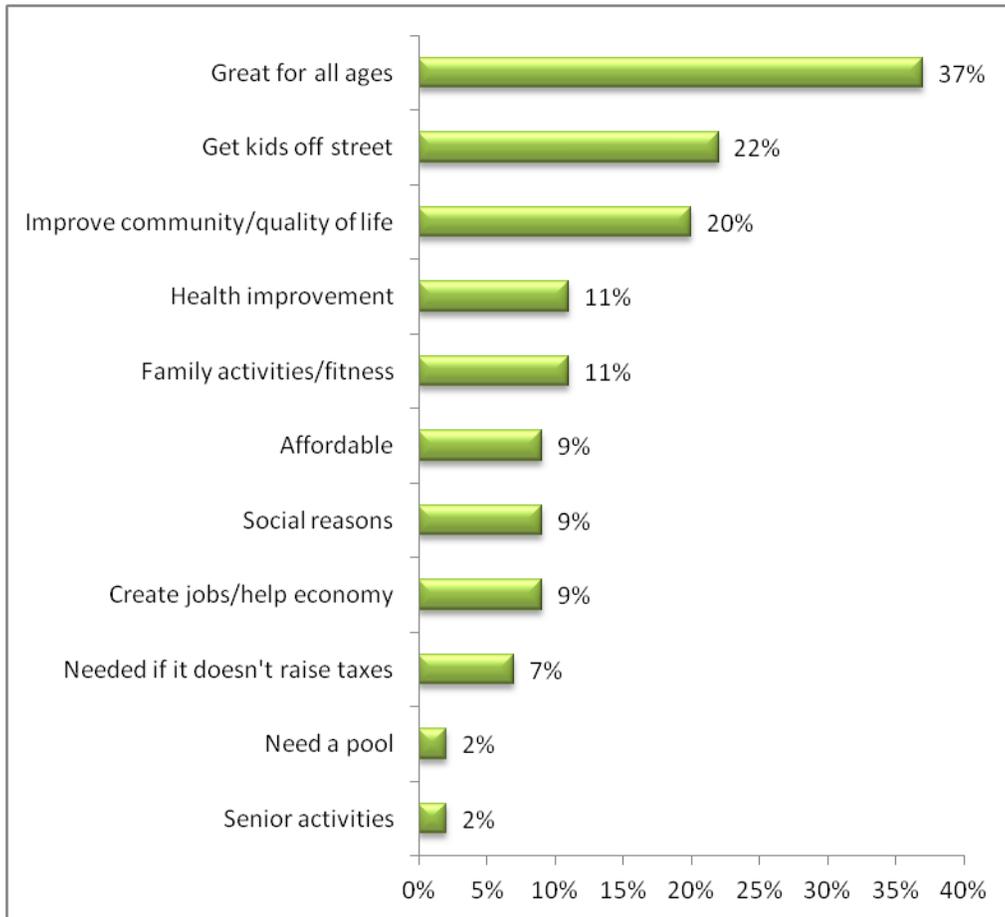
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*Base: Total sample (400).*

*Question: In your opinion is opening a new community center in Reynoldsburg that is a branch of the YMCA a(n) \_\_\_\_\_ idea?*

- The chart that follows displays the reasons why nearly one half (46%) of those polled believe having the community center managed by the YMCA is a good/excellent idea.

**Reasons Why Opening the New Community Center as a YMCA is a Good Idea (Unaided)**

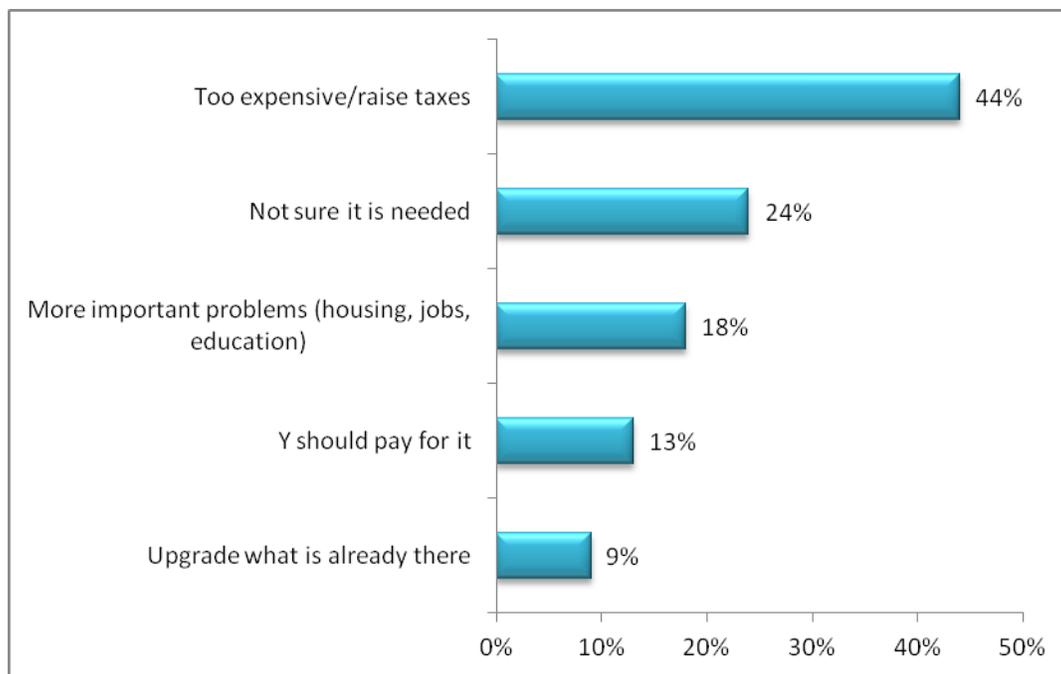


Base: Respondents who believe a opening as a YMCA in Reynoldsburg is a good/excellent idea (184).

Question: Why is opening this new community center as a branch of the YMCA in Reynoldsburg such a good idea?

- The primary reason why some area residents may think that building a new community center and operating it as a YMCA is less than a good idea is that it will be expensive and cause taxes to increase. It appears this response is more likely directed at the idea of the community center being built at all, rather than having YMCA management.

**Reasons Why Opening a New Community Center as a YMCA Is Less Than a Good Idea (Unaided)**



Base: Respondents who believe opening a community center as a YMCA in Reynoldsburg is less than a good/excellent idea (180).

Question: Why do you believe opening a new community center in Reynoldsburg as a branch of this YMCA is less than a good idea?

## **VIII. Price Elasticity of Demand**

- At monthly membership rates of \$75 for families and \$45 for individuals, 3% of area residents claim to be very likely to join the new community center/YMCA. An additional 6% claim to be somewhat likely to join at these rates. This translates, conservatively to approximately 309 full pay, member units during the first year.
- Among those respondents who live within the boundary of the city of Reynoldsburg, 5% are very likely and 8% are somewhat likely to join the new community center/YMCA as members. That is, of the projected 309 full pay member units, about 275 will be City of Reynoldsburg residents.
- At monthly membership rates of \$65/\$39 for a new community center/YMCA, 16% of local residents now claim to be very likely to join and 27% state they are somewhat likely to join. This conservatively translates to approximately 1,697 full pay, member units in the short run. Of these, approximately 1,100 will be residents of the City of Reynoldsburg and 547 will reside outside of the city limits.
- At significantly lower monthly rates of \$49/\$29, the data generated in this research suggests that Reynoldsburg can expect approximately 2,883 full pay, member units, of which an estimated 1,925 will reside within Reynoldsburg.
- These projections are new, full pay member units and do not include existing Y members who may transfer their usage from an existing YMCA branch, nor do they include families or individuals who are given reduced fee access based upon their income.

**Price Elasticity of Demand**

	<b>Total Area (%)</b>	<b>Reynoldsburg (%)</b>
<b>At \$75/\$45</b>		
<b>Very likely</b>	3	5
<b>Somewhat likely</b>	6	8
<b>At \$65/\$39</b>		
<b>Very likely</b>	16	20
<b>Somewhat likely</b>	27	14
<b>At \$49/\$29</b>		
<b>Very likely</b>	28	35
<b>Somewhat likely</b>	22	28

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Base: Total sample (400).

Question: How likely is it that you will join the new, state-of-the art YMCA/Community Center across from City Hall in Reynoldsburg, if a membership for a household including all children costs \$79 per month and a single membership costs \$45 a month?

How likely is it that you will join the new Y at this location if a membership for a household costs \$65 per month and a single membership costs \$39 a month?

How likely is it that you will join the new Y, if a membership for a household costs \$49 per month and a single membership costs \$29?

## IX. Impact of Unlimited Access to All Branches of the YMCA of Central Ohio

- When those area residents who are less than very likely to join the new Reynoldsburg Community Center/YMCA are told that membership also gives them access to all of the other branches of the YMCA in and around Columbus, an additional 11% claim to be very likely to join.
- The chart that follows illustrates the impact of having unlimited access to all of the branches of the YMCA of Central Ohio has on membership projections for Reynoldsburg Community Center.

### **Price Elasticity of Demand: Incremental Full Pay Member Units**

	<b>Just Community Center (#)</b>	<b>Unlimited YMCA Branch Access (#)</b>
<b>At \$75/\$45</b>	309	343
<b>At \$65/\$39</b>	1,697	1,884
<b>At \$49/\$29</b>	2,883	3,200

---

Base: Total sample (400).

Question: How likely is it that you will join the new, state-of-the art YMCA/Community Center across from City Hall in Reynoldsburg, if a membership for a household including all children costs \$79 per month and a single membership costs \$45 a month?

How likely is it that you will join the new Y at this location if a membership for a household costs \$65 per month and a single membership costs \$39 a month?

How likely is it that you will join the new Y, if a membership for a household costs \$49 per month and a single membership costs \$29?

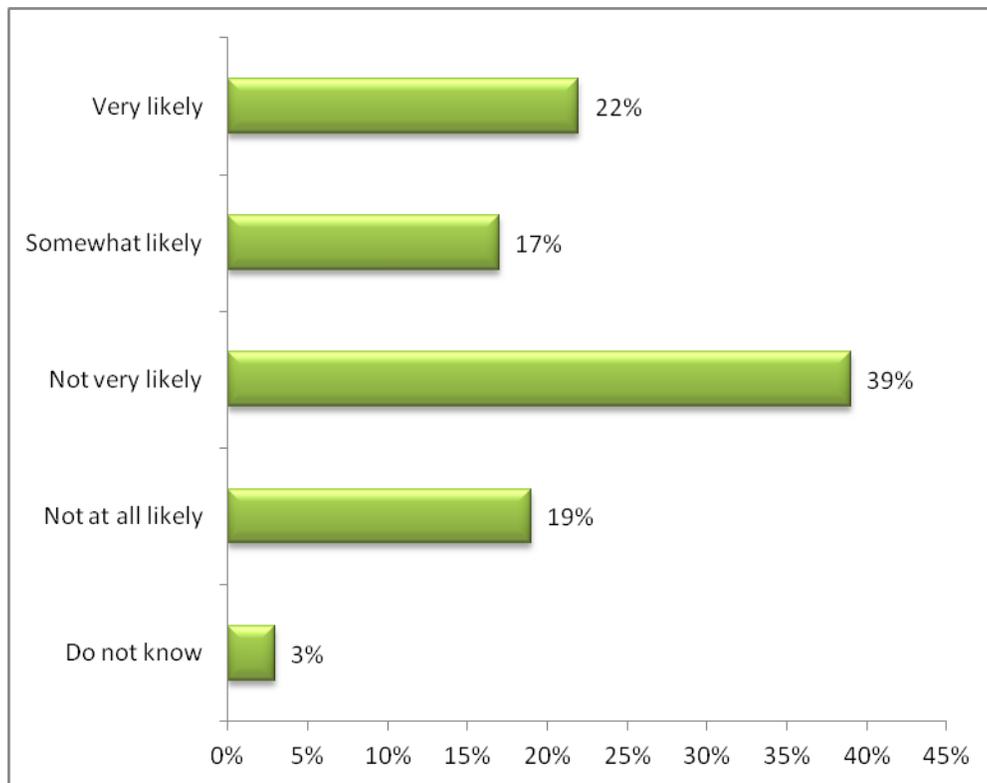
## X. Reaction to Potential Tax Increase

Those Reynoldsburg residents who live and work in Reynoldsburg, plus those who live in Reynoldsburg and work in a jurisdiction that has an income tax rate of less than 2.5%, were asked:

*In order for the city to build the new community center, some consideration is being given to increasing income taxes on some Reynoldsburg residents by 1%. This increase in taxes will only impact those who work in Reynoldsburg or those who live in Reynoldsburg and work elsewhere, where the income tax rate is less than 2.5%. If neither of these describes you, your taxes will not increase.*

- If the vote were held today, 39% of the residents of Reynoldsburg, whose income taxes will increase, claim to be either very likely or somewhat likely to vote in favor of a 1% tax increase. Of these, 22% are “very” likely to vote in favor of the tax increase, and 17% are somewhat likely.

### **Likelihood of Supporting a 1% Income Tax Increase**



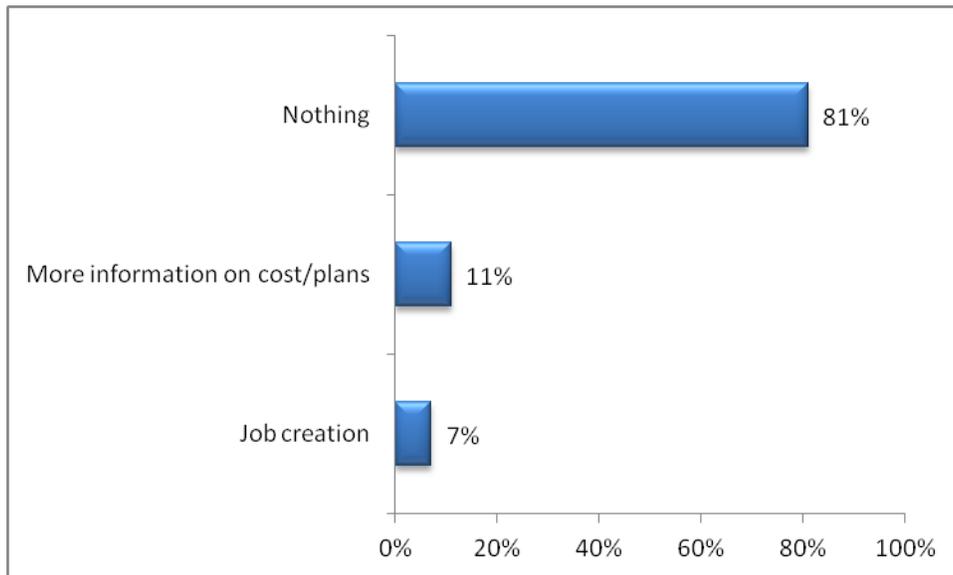
*Base: Residents of Reynoldsburg who either live and work in Reynoldsburg or live in Reynoldsburg and work in a jurisdiction whose income tax rate is less than 2.5% (144).*

*Question: If asked to vote to increase the income tax on those who live and work in Reynoldsburg by 1% in order to build this new community center, are you \_\_\_?*

*Expansion Feasibility Research Reynoldsburg*

- Of the Reynoldsburg residents whose income tax rate will be affected, who claim to be less than very likely to vote in favor of the tax increase, 81% claim there is nothing the city can do or say that will cause them to change their minds or vote.
- However, one out of ten (11%) claim that if they could be shown the plans and learn more about how the money is being spent, they may be persuaded to vote in favor of the tax.
- Another 7% may switch their votes to positive if the tax increase will create jobs in Reynoldsburg.

***What Would Cause You to Support the Tax Increase?  
(Unaided)***



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*Base: Residents of Reynoldsburg who either live and work in Reynoldsburg or live in Reynoldsburg and work in a jurisdiction whose income tax rate is less than 2.5% (144).*

*Question: What, if anything, can the City or the YMCA do to cause you to become more likely to vote in favor of this increase?*

*Expansion Feasibility Research Reynoldsburg*

Respondents whose income tax rate will rise were next presented with a series of 9 statements and asked to indicate what impact, if any, each would have on whether or not they would vote to support the tax increase.

- Of these statements, the two most likely to sway additional voters whose taxes will be impacted are:
  - In addition to the community center, the increase in taxes will help fund park improvements, Senior Center updates, as well as road and infrastructure repairs.
  - Reynoldsburg residents will be given a discount on access to the facility, versus non-residents.

**Impact of Statements on Likelihood of Supporting Tax Increase**

	<b>More Likely (%)</b>	<b>No Impact (%)</b>	<b>Less Likely (%)</b>
<b>This tax raises the needed funds while impacting only about one third of Reynoldsburg residents.</b>	47	47	6
<b>Reynoldsburg residents who now work in Columbus are already paying the equivalent of these fees to Columbus.</b>	47	44	9
<b>Reynoldsburg residents will be given a discount on access to this facility versus non-residents.</b>	61	33	6
<b>This new YMCA is likely to cause more young, professional homeowners to choose to live in Reynoldsburg.</b>	53	39	9
<b>Having a YMCA in Reynoldsburg will increase the health and wellbeing of residents.</b>	50	44	6
<b>This new YMCA will give residents a place to meet and socialize.</b>	58	36	6
<b>Having the city build the community center and the YMCA manage it, assures that Reynoldsburg will get the best possible facilities and programming.</b>	47	44	9
<b>The tax increase does not impact retirees.</b>	55	36	6
<b>In addition to the community center, the increase in taxes will help fund park improvements, Senior Center updates and road and infrastructure repairs.</b>	62	36	3

*Base: Residents of Reynoldsburg who either live and work in Reynoldsburg or live in Reynoldsburg and work in a jurisdiction whose income tax rate is less than 2.5% (144).*

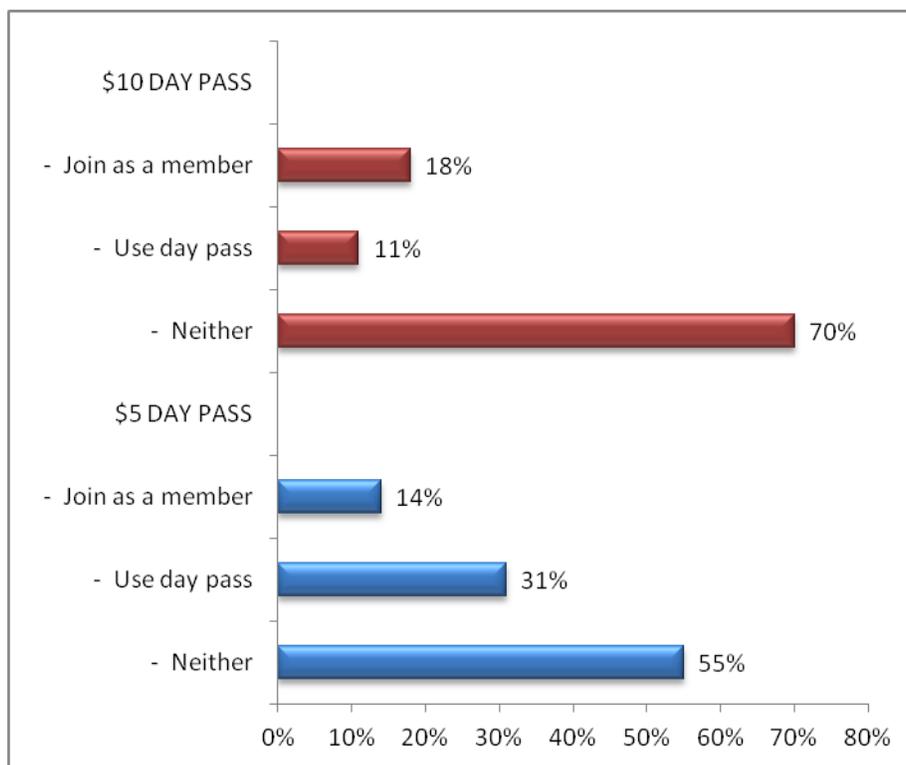
*Question: What impact, if any, would each of these statements have on your likelihood of supporting a 1% increase in income taxes paid by those who work in Reynoldsburg?*

## **XI. Day Pass Price Elasticity of Demand**

Those area residents who are less than very likely to join the new Community Center/YMCA as members, at any of the tested prices, were asked what they would be most likely to do if a \$10 per person day pass is available.

- If a \$10 per person day pass is available, 11% of those unlikely to join as a member claim they will access the Community Center with this type of pass.
- If the cost of a day pass is \$10, it appears additional area residents may decide to join the Community Center/YMCA as members. That is, if a per-person day pass is \$10, the monthly cost of membership appears to be a better value to 18% of area residents, who previously claimed they are less than very likely to join.
- If the cost of a day pass is \$5 per person per day, a greater percentage of area residents (31%) claim they will access the Community Center with a day pass versus joining as a member.
- For the most part, those area residents who claim they will access the Community Center via a day pass, if the cost is \$5, who were not likely to do so when the cost of a day pass was \$10, are people who otherwise claim they would not use the Community Center. That is, the percentage who claim they will neither pay the daily rate or join as a member, drops from 70% at a day rate of \$10 to 55% when a day pass costs \$5.

### Day Pass Price Elasticity of Demand



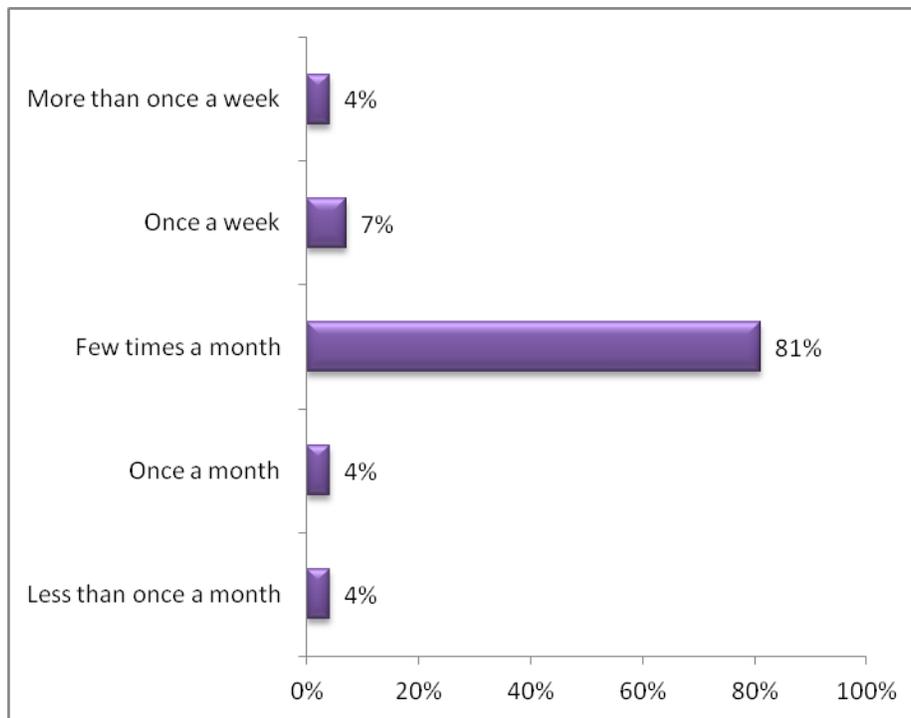
Base: Respondents unlikely to join the Community Center as a member (348).

Question: It is possible that when this new community center opens, residents of Reynoldsburg can access the facility with a day pass rather than a YMCA membership. If the cost, per person for a day pass is \$10, are you most likely to:

If the cost of a day pass is \$5 per person, are you most likely to?

- Of those who claim they are most likely to access the Community Center/YMCA with a \$5 day pass, most think they will come to the center “a few times a month.”

### **Frequency of Use with Pass**



Base: Respondents who would use a day pass (108).

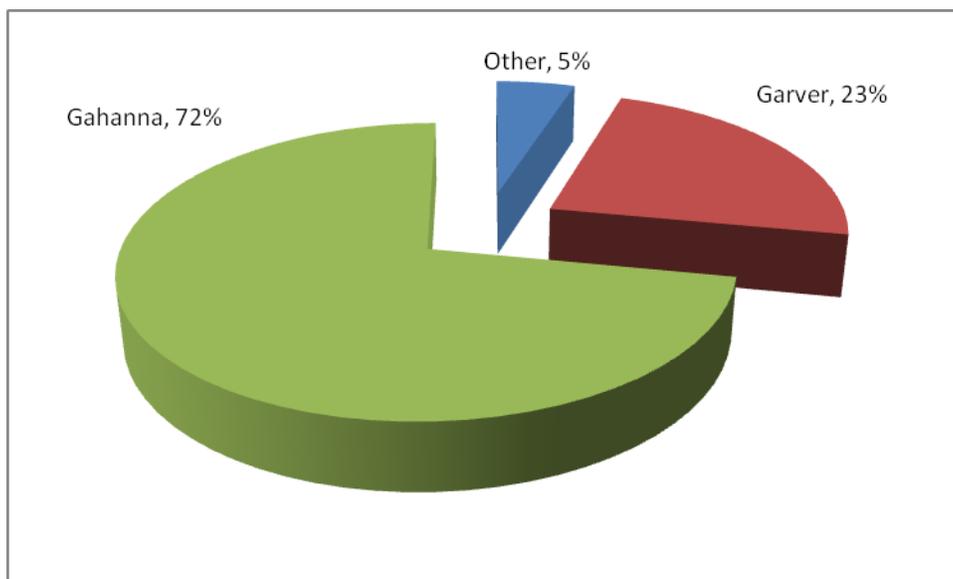
Question: If you are most likely to come to the new community center by buying a single day pass, approximately how often do you think you will come?

**Detailed Findings: YMCA of Central Ohio Members**

## I. YMCA Members

The information presented here is based upon 753 completed surveys with members at the Gahanna (543) and the Garver (171) Branches of the YMCA, plus an additional 39 YMCA members who since the time of joining have switched to using some other branch of the YMCA of Central Ohio most often.

### ***YMCA Branch Used Most Often***



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Base: Total Y member sample (753).

Question: Which branch of the YMCA do you now use most often?

*Expansion Feasibility Research Reynoldsburg*

- Of these members, 40% have individual memberships and 38% have household memberships. The remaining have some other type of membership, including 9% who belong to the YMCA through Silver Sneakers.

***Type of Membership***

	<b>TOTAL SAMPLE (%)</b>	<b>Gahanna (%)</b>	<b>Garver (%)</b>	<b>Other (%)</b>
<b>Individual</b>	46	49	38	49
<b>Household</b>	38	37	45	23
<b>Silver Sneakers</b>	9	10	5	18
<b>Other</b>	6	5	11	9

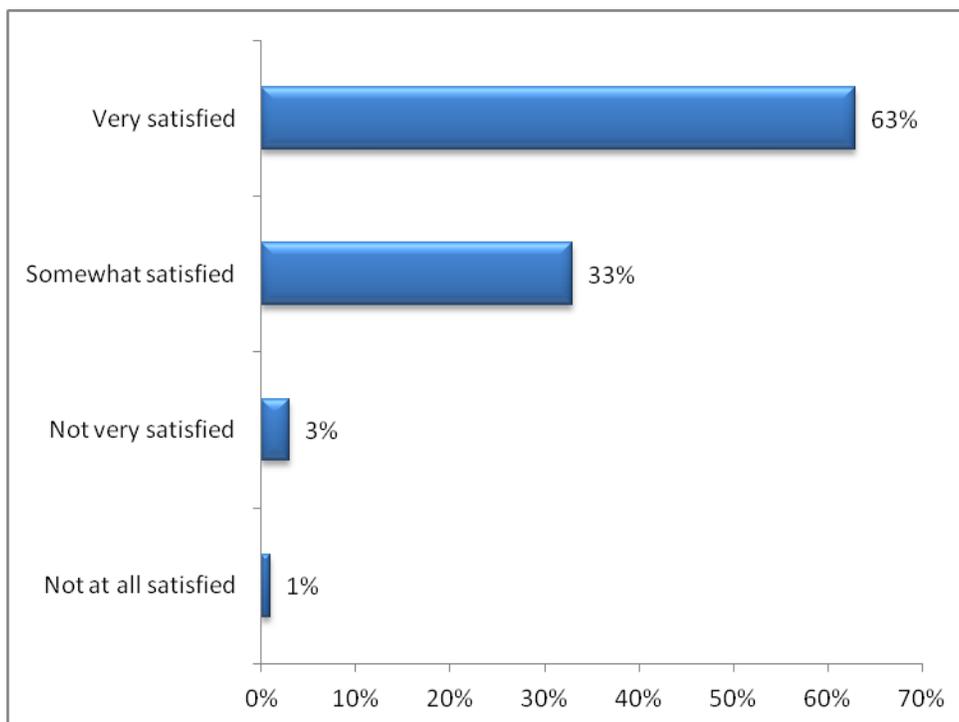
*Base: Total Y member sample (753).*

*Question: What type of membership do you now have to the YMCA?*

## II. Member Satisfaction

- Ninety six percent (96%) of the Y members participating in this research claim to be very (63%) or somewhat (33%) satisfied with their membership. By national YMCA standards, this is a very high level of satisfaction, and what has now become a standard across the YMCA of Central Ohio association.

### **Member Satisfaction**



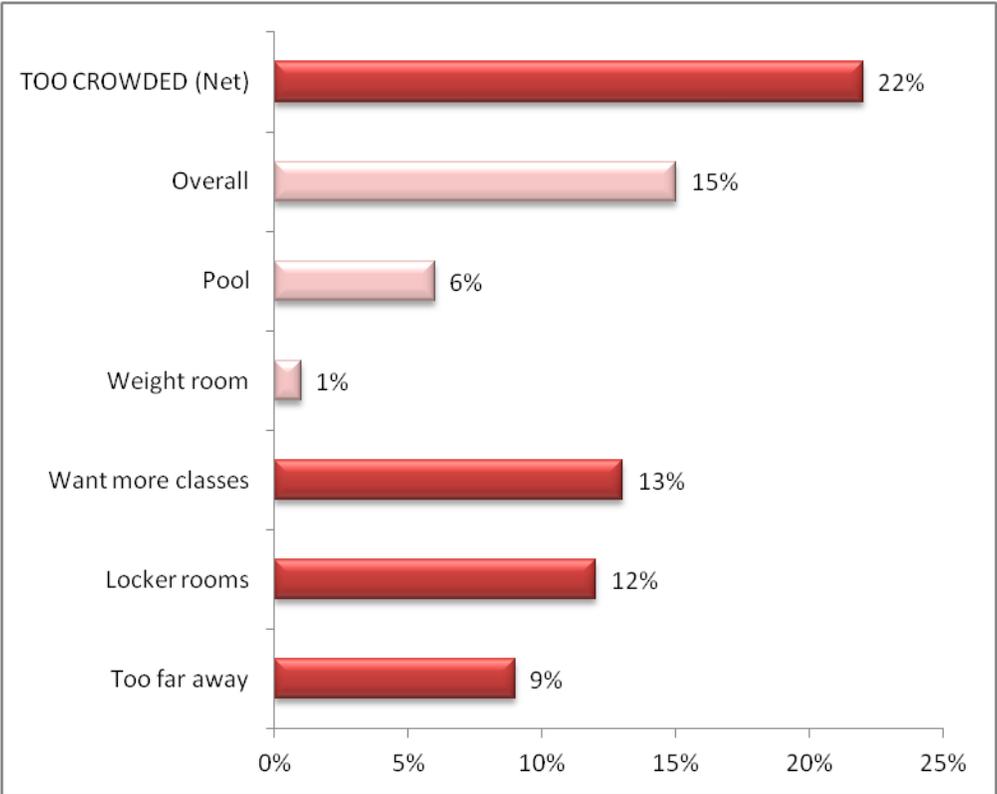
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Base: Total Y member sample (753).

Question: Overall, how satisfied are you with your membership in the YMCA of Central Ohio?

- In order to increase this already high level of satisfaction, the YMCA of Central Ohio should focus on the areas included in the following chart. What is displayed are the reasons given, on an unaided basis, as to why some members are less than “very satisfied”.
  - Facilities are too crowded.
  - The desire for more classes/classes at more convenient times.
  - A desire for better locker rooms.

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



Base: Y members who are less than very satisfied (252).

Question: In your own words, please explain why you are less than very satisfied, and what we can do to improve your member experience.

### III. Likelihood of Remaining a YMCA Member

- Ninety two percent (92%) of the members participating in this survey claim to be either very or somewhat likely to remain members for at least the next twelve months.
- Members of the Gahanna Y are more likely than their colleagues at the Garver YMCA to claim to be very likely to remain Y members for at least another year.

#### *Likelihood of Remaining a YMCA Member*

	<b>TOTAL SAMPLE (%)</b>	<b>Gahanna (%)</b>	<b>Garver (%)</b>	<b>Other (%)</b>
<b>Very likely</b>	73	77	61	59
<b>Somewhat likely</b>	19	16	32	15
<b>Not very likely</b>	4	3	3	15
<b>Not at all likely</b>	2	1	1	7
<b>Do not know</b>	3	2	3	3

Base: Total Y member sample (753).

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

## IV. Reaction to the Concept of a New Reynoldsburg Community Center

Y members were next read a description of the proposed location for the new Reynoldsburg Community Center.

- One quarter of the Y members view the proposed Community Center location as very convenient for usage by the members of their household.
- An additional 18% see the site as somewhat convenient.
- A greater percentage of Garver Branch members view the proposed location as convenient versus those who use the Gahanna YMCA most often.

### ***Convenience of the Proposed Reynoldsburg Community Center Location***

	<b>TOTAL SAMPLE (%)</b>	<b>Gahanna (%)</b>	<b>Garver (%)</b>	<b>Other (%)</b>
<b>Very convenient</b>	25	23	30	31
<b>Somewhat convenient</b>	18	15	29	5
<b>Not very convenient</b>	21	21	21	13
<b>Not at all convenient</b>	36	41	19	51

*Base: Total Y member sample (753).*

*Question: Overall, how convenient is this location for use by you and other household members?*

*Expansion Feasibility Research Reynoldsburg*

- In general, most current members of the Y (78%) perceive the idea of Reynoldsburg operating their new Community Center as a branch of the YMCA of Central Ohio as either an excellent (35%) or good (43%) idea.

***Reaction to the Reynoldsburg Community Center  
Being a YMCA Branch***

	<b>TOTAL SAMPLE (%)</b>	<b>Gahanna (%)</b>	<b>Garver (%)</b>	<b>Other (%)</b>
<b>Excellent idea</b>	35	34	36	36
<b>Good idea</b>	43	44	40	36
<b>Fair idea</b>	16	16	16	18
<b>Poor idea</b>	4	3	5	3
<b>Very poor idea</b>	2	1	3	8

*Base: Total Y member sample (753).*

*Question: In your opinion is opening a new community center in Reynoldsburg that is a branch of the YMCA a(n) \_\_\_\_\_ idea?*

## V. Facility Usage if Community Center is a Branch of the YMCA

Members were next asked what they would be most likely to do if, when it opened, the new Reynoldsburg Community Center was a branch of the YMCA.

- As should be expected, the majority of Y members claim to be most likely to continue to use their current branch most often (assuming their cost of membership is the same). However, a new Y in Reynoldsburg at the proposed site will cannibalize a meaningful number of Y members from both branches being studied and, in particular, the Garver Branch.
- If just the members of the Gahanna and Garver branches who claim they will “definitely” switch usage to the Reynoldsburg Community center/YMCA actually do so, and none of those who claim they will probably switch, in fact switch, the Community Center can anticipate an additional 880 member units in the short run.
- Of these, approximately 407 will be from the Gahanna Branch and 473 from the Garver Branch.
- This estimate does not include those YMCA members who access the branches via Silver Sneakers or other insurance mechanism.

### Potential Member Cannibalization

	TOTAL SAMPLE (%)	Gahanna (%)	Garver (%)	Other (%)
Definitely stay at current branch	49	57	26	46
Probably stay at current branch	23	20	35	21
Probably switch to Reynoldsburg	15	13	21	13
Definitely switch to Reynoldsburg	12	10	19	21

Base: Total Y member sample (753).

Question: Overall, how convenient is this location for use by you and other household members?