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Revenue

Gross Revenue

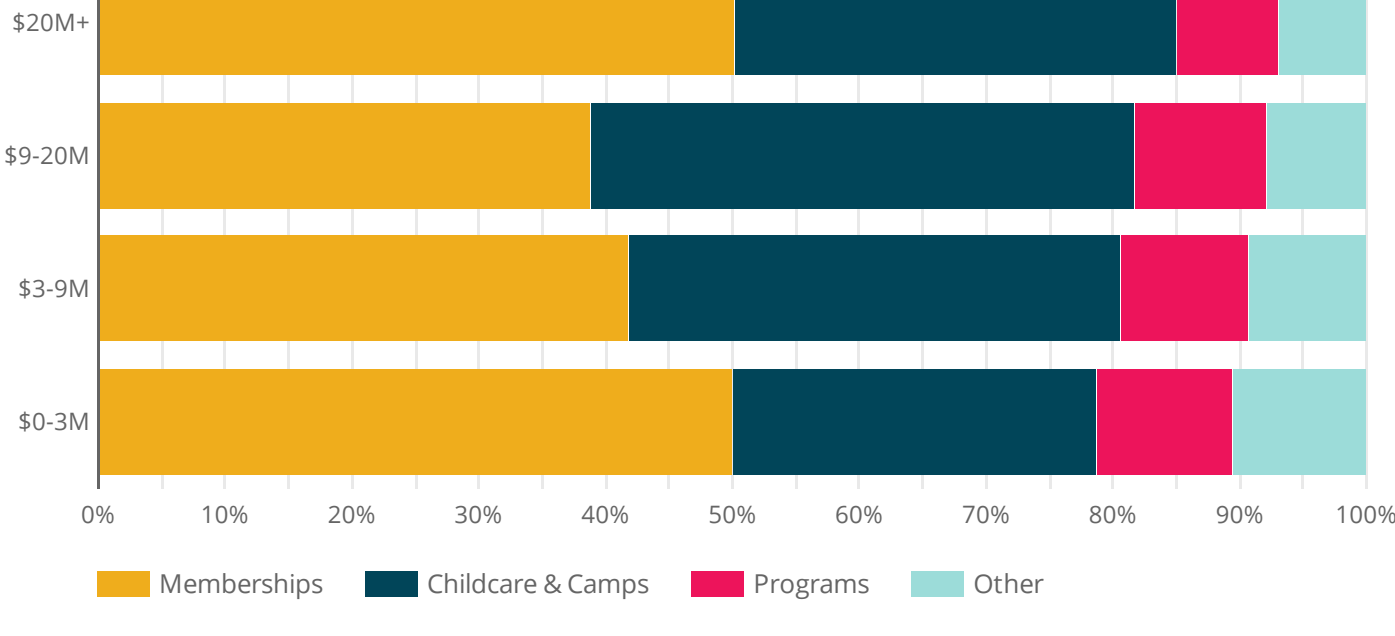
62.2%

Back to Normal for July

YMCAs, JCCs, and community centers remain in revenue recovery in response to the COVID-19 economic crisis.

Revenue across all YMCAs, JCCs, and other organizations is still normalizing. While membership numbers did increase compared to last year, childcare and program revenue continue to struggle due to concerns about cases rising and close proximity with others.

Revenue Composition by Revenue Size



Gross Revenue % Back to Normal By Revenue Size

| Revenue Size | % Back to Normal |
|--------------|------------------|
| \$20M+ | 53.9% |
| \$9-20M | 60.2% |
| \$3-9M | 70.4% |
| \$0-3M | 71.3% |

Chargebacks are still significantly higher compared to 2019 baseline

The July chargeback percentage for YMCAs, JCCs, and other organizations was 0.26%, significantly higher than the 0.03-0.05% baseline. This number has decreased from the the shutdown average of 0.7%. However, the fact that this percentage is high shows that the nation is still recovering from the economic impact from the pandemic, and many members are still struggling.



RECOMMENDATIONS

Reimagine ways to extend your membership beyond your facility in order to preserve membership revenue. The most common strategy is virtual membership. Since the start of COVID-19, many associations have provided virtual content through Daxko's API, [GroupEx PRO](#), and [SugarWOD](#). Also, consider offering daytime childcare or virtual classes as more families opt into at-home learning. This is an emerging need in many communities and expanding offerings can protect childcare and program revenue.

Check-Ins

Total Check-ins

31.1%

Back to Normal for July

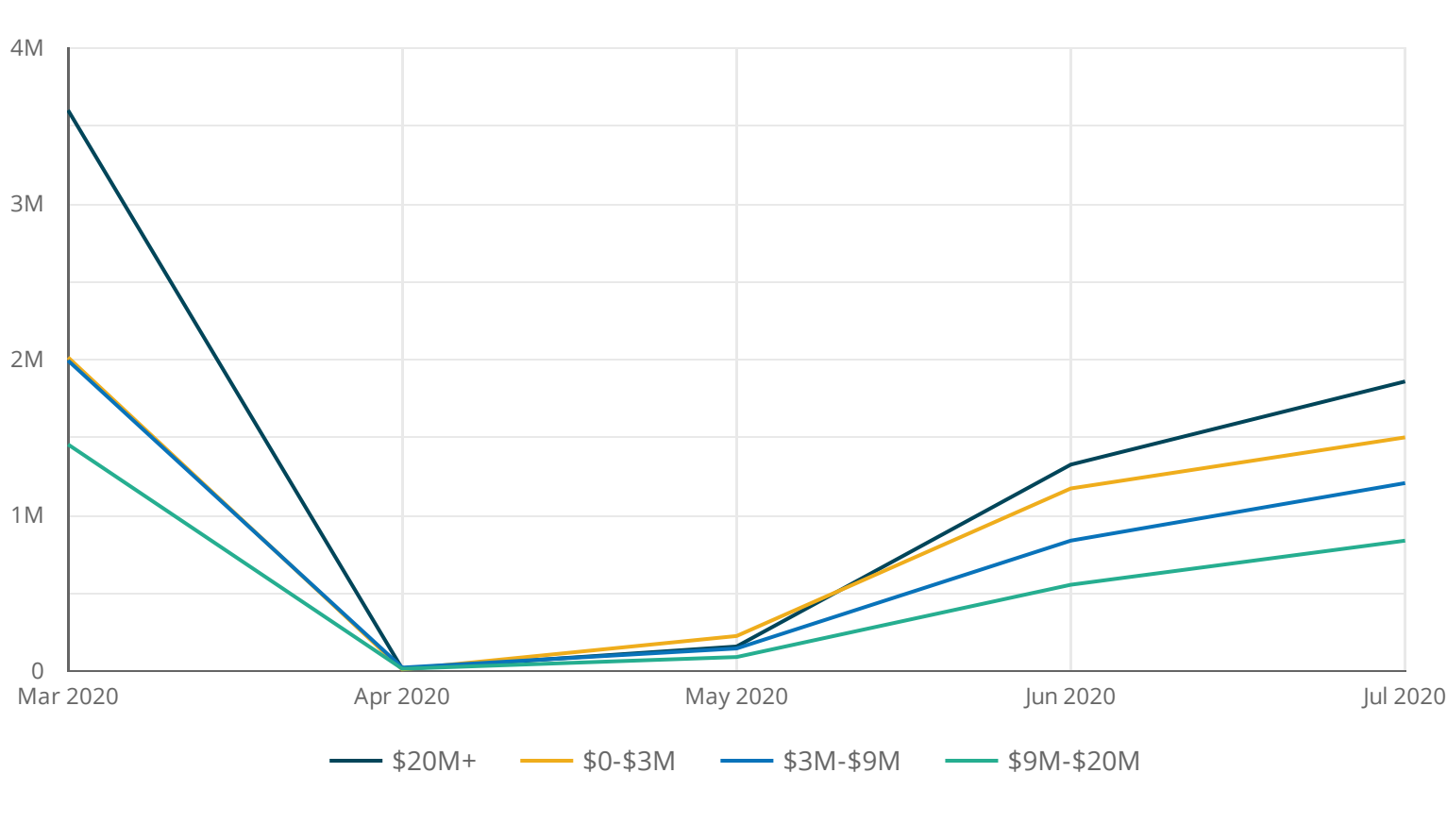
Member check-ins increase by 38.9% in July compared to June.

Check-ins continue to rise month over month as more people return to facilities. While positive upticks each week are encouraging, this health indicator can be unstable as the continued rises in COVID-19 cases cause members to be hesitant returning.

Total Check-ins % Back to Normal By Revenue Size

| Revenue Size | % Back to Normal |
|--------------|------------------|
| \$20M+ | 23.6% |
| \$9-20M | 30.5% |
| \$3-9M | 32.8% |
| \$0-3M | 48.9% |

Total Check-ins



RECOMMENDATIONS

Re-assure your members that you are taking the right precautions to keep them safe when they return. Many organizations are requiring COVID-19 health scans and leveraging limited capacity trackers to help mitigate fears and risk. Consider partnering with [WellD Health](#) to provide health screenings as it integrates with Daxko Operations. Also, leverage scheduling through [Daxko Operations](#) or [GroupEx PRO](#) so members can secure time at the facility and limit the chances of transmission. Last month, Daxko customers tracked 21,210 virtual check-ins. For at-risk members, or for states facing re-closures, encourage members to check-in virtually and participate in virtual memberships so that you can continue tracking engagement outside of your facility.

Membership

Active Units

78.1%

Back to Normal for July

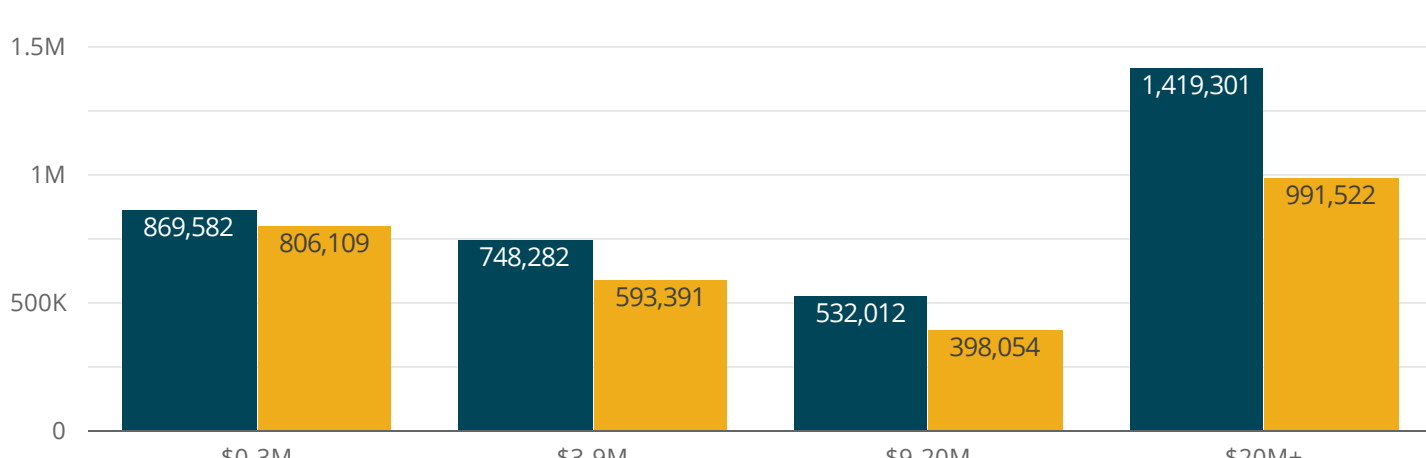
Active memberships dip in July with a 5.2% decrease compared to June.

Terminations have seen an uptick with a 2.8% increase compared to last month. In all, a majority of members are remaining active with 78.1% of members active compared to July 2019. YMCAs, JCCs, and other organizations must explore new ways to provide value and retain members who aren't comfortable returning to the facility.

Membership Percent Back to Normal by Revenue

| Segment | Active Units | New Joins | Renewals | Holds | Terminations |
|---------|--------------|-----------|----------|----------|--------------|
| \$20M+ | 69.9% | 31.1% | 33.0% | 1,237.5% | 135.5% |
| \$9-20M | 74.8% | 42.2% | 41.7% | 673.6% | 145.6% |
| \$3-9M | 79.3% | 45.4% | 37.2% | 592.7% | 122.7% |
| \$0-3M | 92.7% | 48.4% | 44.8% | 495.3% | 110.9% |

Active Unit Counts



RECOMMENDATIONS

As members continue to opt into at-home workouts, it is time to expand the channels you use to engage with members. Meet members online via community groups or virtual programming to boost member engagement. Lean on your community app to encourage engagement and gamification of health goals while people are still socially distant or if your facilities are facing re-closure.

Registration

Childcare Registrations

81.3%

Back to Normal for July

Programs Registrations

67.9%

Back to Normal for July

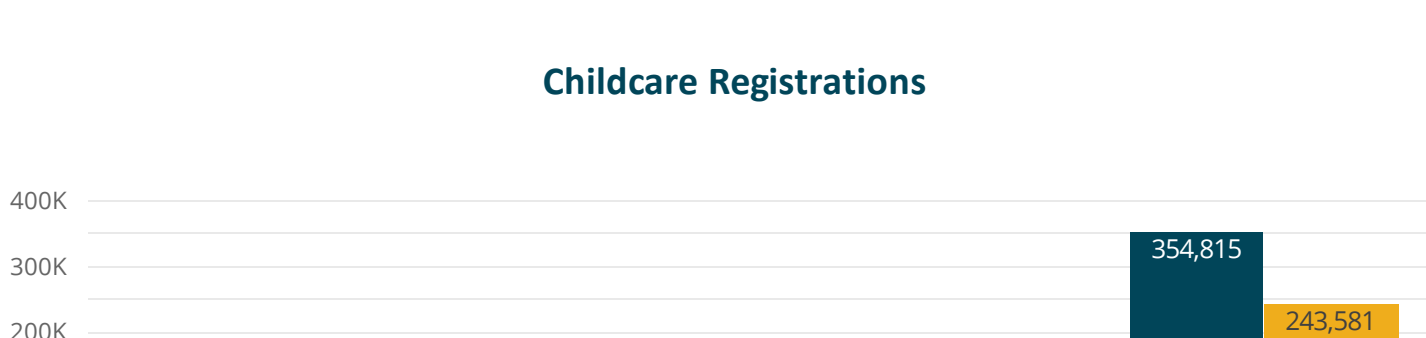
Childcare, camps, and program registrations are slow to recover due to health concerns.

Registrations for July are down compared to last year for childcare, camp, and programs. This is expected as many registrations occur at the end of summer with the approaching new school year. With the continued rise in cases, many families are opting into at-home learning and opting out of in-person enrichment programs.

Total Registrations % Back to Normal By Revenue Size

| Segment | Childcare & Camps | Programs |
|---------|-------------------|----------|
| \$20M+ | 68.7% | 46.3% |
| \$9-20M | 80.7% | 88.6% |
| \$3-9M | 97.2% | 78.3% |
| \$0-3M | 93.3% | 81.7% |

Childcare Registrations



RECOMMENDATIONS

Start to reimagine ways to serve the ever-changing landscape of at-home learning. There are many working families that are having to manage coursework, enrichment, and struggling to provide needed socialization for kids. Strategize new ways to create community for kids virtually or provide daytime in-person programming for families that need flexible schedules but are nervous sending children back to school.