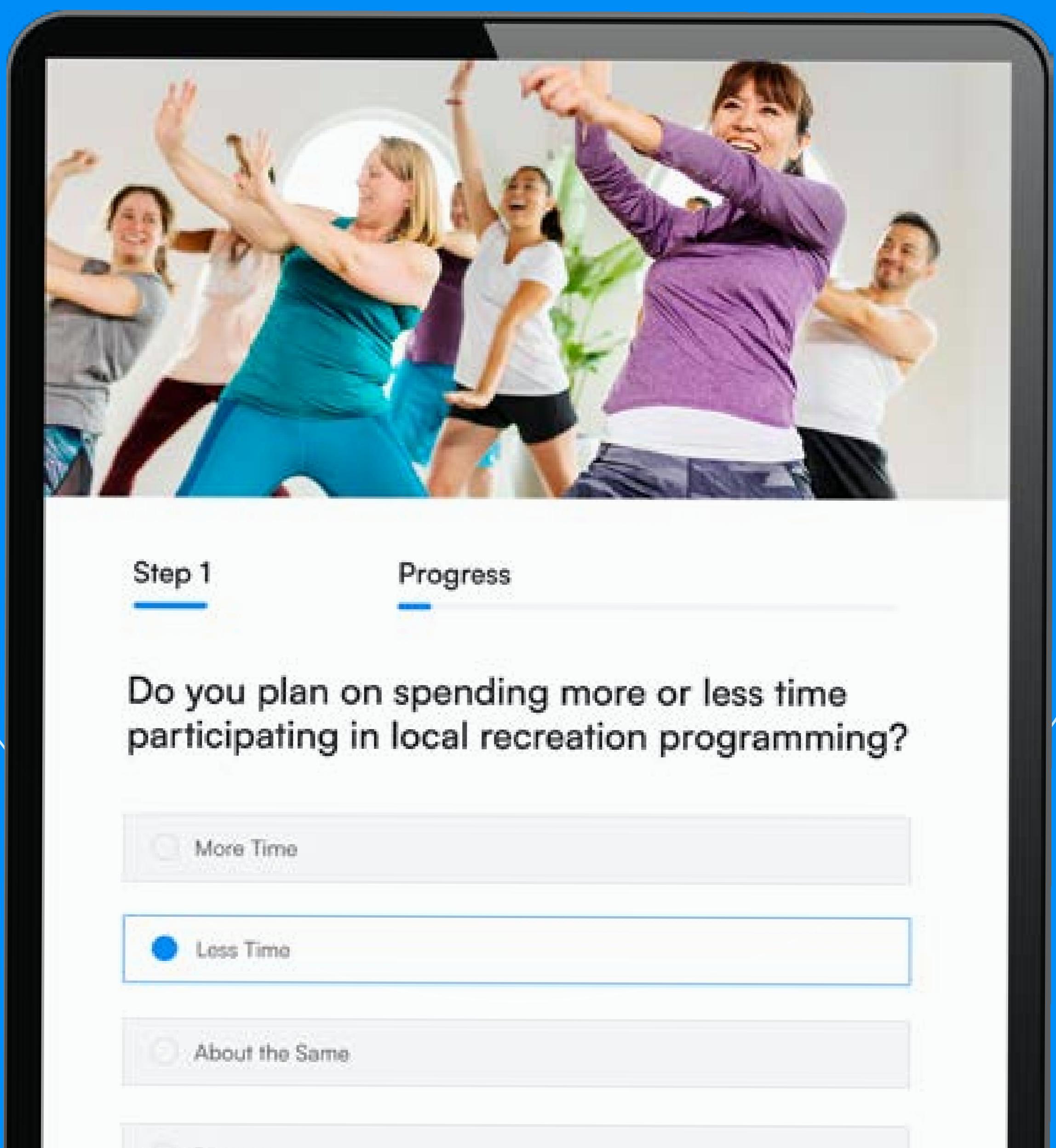
amilia

2024 Trends and Opportunities for Your Community Center

Consumer Research Results and Analysis



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Shift to online services

Introduction

As experts in the recreation registration space, we've seen changes in the way consumers spend their time engaging in community activities. The pandemic had a huge impact on peoples' habits, and we are all still seeing the lingering effects and adjusting to them. As group activities were on a hiatus, consumers had to safely occupy themselves with what was at their disposal. This presented a shift to online services and individual activities.

While these new realities have emerged, we have seen numerous community centers putting in place initiatives to adapt along with their changing communities. What hasn't changed is the important role they play and the worth that their non-profit motivations bring. Of course, this isn't news to most of you.

We had a hunch that 2024 presents a big opportunity for community centers to level up their experience and expand by understanding more about, and adapting to, changing consumer priorities.

We know now, through the data this eBook provides, that this hunch was right! In addition, you will also find that this eBook will:

- **Slice the data in different ways to meticulously draw out all the learnings possible.**
- **Discuss theories and hypothesis on why the data may present in the way that it does.**
- **Provide areas of focus in which you and your organization can make the most impact with.**

Together, let's discover the opportunities 2024 has to offer! →

Executive Summary

We conducted this census balanced survey in September 2023. The surveyed group were adults in the United States. All regions were included in the survey. We conducted this census balanced survey from over 450 respondents.

Results

This study confirmed an increase in willingness to participate in community recreational activities year over year. In addition, we discovered key factors related to consumer engagement and preferences such as:

1 A key part of consumers' health and wellness intentions.

2 Awareness of community centers results in participation.

3 Membership experience is a key factor in consumer decision-making.

Consumers expressed that community centers continue to be perceived as essential to the people in their area, whether they currently they participate in activities, plan to or do not intend to. In addition, though the majority of consumers plan to spend more time at community centers, they hope to keep their spending as the same as last year. Finally, we identified key areas of opportunity in which you can apply these learnings to increase participation and attract more community members to your center.

Key Statistics

Participation Will Likely Increase

90%

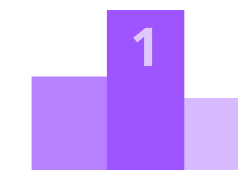
of respondents want to **spend more or the same amount of time** at their local community center.

Consumers Look to Discover Local Facilities

80%

of people who were not aware of a community center in their area said **they would participate** if there was one

Importance of Member Experience



Consistently ranked in respondents' top 3 factors: **Registration Process, Online Portal, Flexible Payment**

Implications and recommendations

The outlook for the community center space appears promising. Our data analysis has revealed ample opportunities to expand your community and enhance engagement among current participants. The question is, how can you achieve this? While marketing plays a crucial role, our findings have highlighted two key insights: firstly, the importance of value, as participants are keen to enjoy themselves more without increasing their spending. Thus, increasing awareness of the numerous benefits and programs available is imperative. Secondly, focusing on the member's experience is paramount. Ask yourself two vital questions: 'How is their experience prior to joining our programs, including the sign-up and payment process?' and 'Does their experience meet expectations once they are on-site, encompassing program variety and the safety of our facilities?'

→ You can discover how our clients optimized experience for their members before and during programming by viewing the following on-demand webinars:

- **Modernizing Your Community Center: Empowering Members to Self-Serve** with Matt Lenner

- **How YMCA of Portage is Helping Children Adapt with Sensory Rooms** with Shannon Burhans

Section 1

Opinions and attitudes towards activities & recreation programming

We created a section around individuals' opinions and attitudes towards community activities and recreation programming in general. Before we launched into the questions, we provided them with this definition of **"recreation programming or activities"**:

"An in-person organized event around specific activities such as sports, games, book clubs, robotics, art and music classes."

When we asked the respondents how important participating in local recreation programming or activities was to their quality of life and overall health,

78%

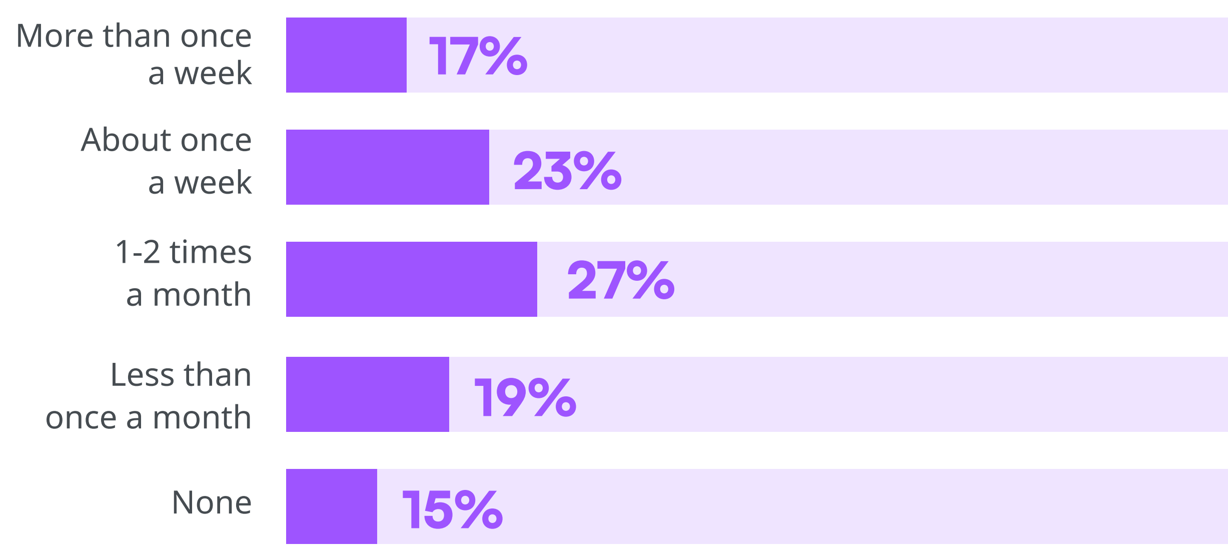
affirmed that these activities **were very important or extremely important.**

In addition, the same can be said for how many respondents perceive that community center programs bringing value to their family.

75%

affirmed it was either **extremely valuable or very valuable** to their families.

Despite this, when asked about the frequency of their participation, **less than half** of respondents confirmed that they or a family member participated in community programming once a week or more in the last year.



It might seem to be disheartening that less than half participate regularly, but this study is here to show you opportunities and potential for next year. This particular question reflects current or past behavior, and we are looking for these types of opportunities to increase engagement levels.

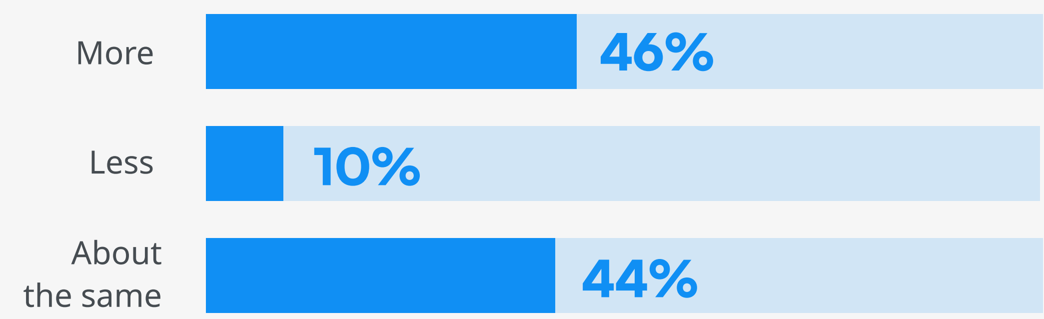
The answer to these questions did reveal a very interesting insight. There appears to be **a gap between people's attitudes and their participation.** So, what could be causing it and what can we do about it? The best way to uncover these answers is to further explore the data we collected.

For the next question, we asked...

Do you want to spend more time in participating in local recreation activities?

46% Wants to spend **more time**

44% Wants to spend **the same time**



So, what's exciting here is that there is only 10% of people who plan to spend less time participating in activities and this is very much outweighed by the 46% of consumers that want to spend more time.

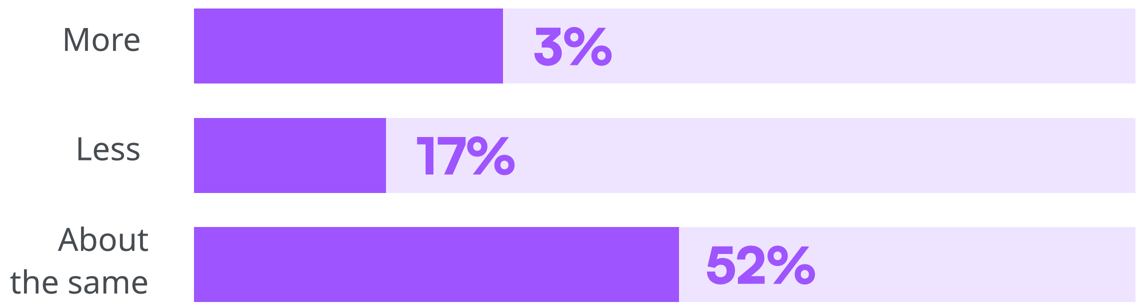
In addition, this also gives us more insight into the gap we noticed earlier in regard to consumers' views on the value of community programming and overall frequency of participation. Could the recognition of the value contribute to the desire to spend more time and explain that though the perceived value is high, **frequency of participation** is relatively underwhelming?

As a follow up, we asked, "Do you plan on spending more or less money on local recreation programming or activities in 2024 vs 2023?"

52% consumers plan to spend about the same amount

17% consumers are planning to spend less

This likely means that nearly 70% of consumers are feeling the impact of the current economy, which is not a big surprise.



What we can recommend through the insights this survey is showing so far is that though the majority of consumers want to spend more time participating in community programming, they do not want to spend more money. **So, making the value & benefits of membership at your community centers clear and programming easy to access will be key in being able to meet consumers' expectations and aspirations.**

In addition, across all groups more than 50% of respondents prefer to participate in group activities. **This shows that people are not only looking for the ability to do the activities that they want but want to do it in a social context.**

And finally, when we asked, "Would you prefer to be a member at a single facility or center with many options for different activities or visit different facilities that each specialize in the activities that you want to participate in?"

74% of respondents asserted that they would prefer to visit one facility for all their activities.

In a tough economic context, it is fair to assume that consumers want more for their money by having one membership for a variety of programs under one familiar facility.

Key Takeaway

1. Consumers see the value in participating in activities and recreation programming in their community.

2. Participants want to get the most value possible for the money they spend. Though the majority of consumers surveyed want to keep a similar level of spending, they do want to spend more time participating in this type of programming.

3. Consumers overall preferred to participate in many types of activities at one facility and in the context of a group rather than at many facilities or individually.

This data reflects two preferences of the surveyed consumers that are favorable for community centers. Being able to provide such a wide variety of programming under one roof and through one membership, often in a group setting means that the outlook for bridging the gap we discovered between the value and frequency of participation is very favorable.

Section 2

Knowledge & Use of Local Facilities

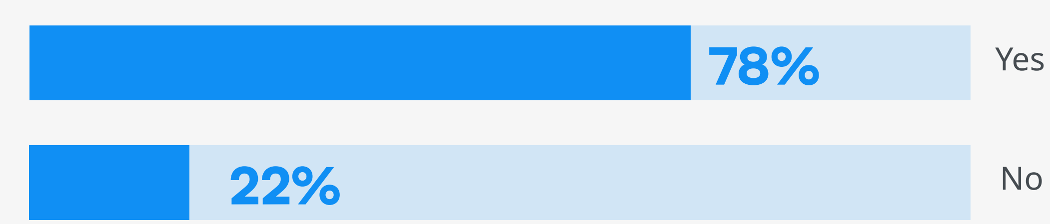
In section 2, we asked a series of questions to uncover more about consumers' knowledge and use of their local community center facilities. The goal of these questions was to unearth opportunities in the awareness and usage patterns of the consumers surveyed. We started by defining community center for them:

"A community center is a facility or building where families and individuals from a particular community can meet for a variety of social, educational, or recreational activities."

The first question was to establish the awareness piece by asking

Are you aware of a community center in your local area?

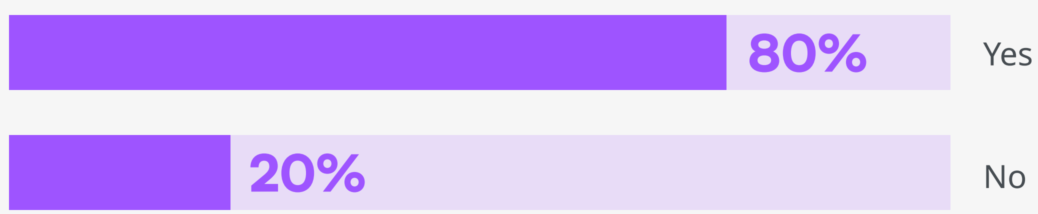
22% were not aware



As a follow up, we wanted to determine what percentage of these consumers were open to the programming despite this, and so when we asked

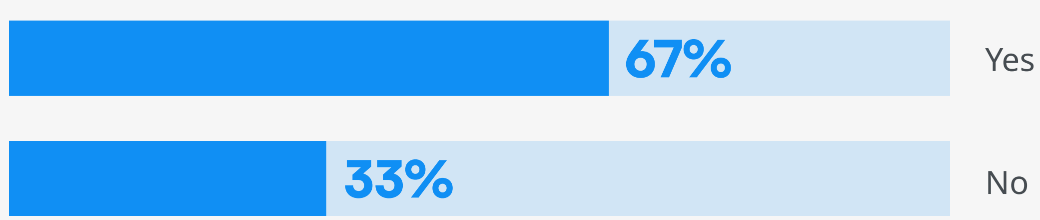
Would you be likely to visit a community center in your local area for recreation programming or activities, if you were aware of one?

80% would go



Have you visited a community center in the last year?

67% have attended



Let's now explore the potential that this data offers. You can assume that you have 20% of your market to reach and successfully introduce your facilities through awareness initiatives. The methods could be traditional marketing strategies: outreach, advertising, referral programs and partnerships.

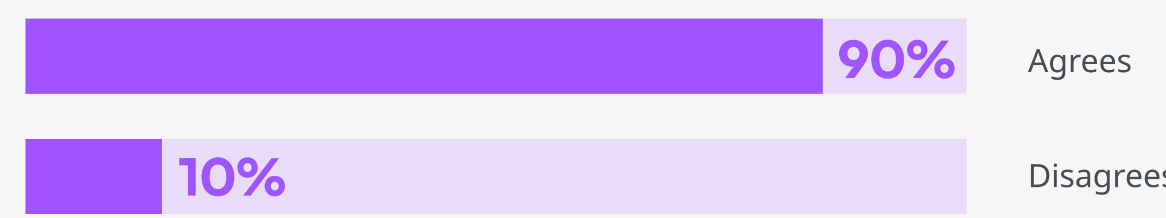
In addition, when you take the difference between the consumers who are aware and those who have attended a community center, you can assume that **there is about 13% of people who are aware of their local community center, but do not engage with the programming at the facility.** These are the consumers who you maybe need to tailor the offering a bit more for by exploring different types of classes and programming, extending hours, or making it easier to sign up or learn about your programs.

Furthermore, let's not forget that we've already established in section 1, that there's 46% of people who are already participating in activities and recreation programming who want to do more, these types of changes might just be the thing to bring them in more often.

The next question we asked was

Do you agree with the statement 'a community center is valuable to me/my community'?

90% Agrees



We can see that the perceived value of community centers is higher than just recreation programming and activities alone. There's something about having it under one roof, about the variety of programming, bringing people together and the history you have with your communities that creates incredible value.

Let's layer this learning into some of the previous data points we discussed.

Even if the surveyed consumers aren't aware of a local community center, the majority of these same respondents see the value a community center brings locally. And even if some of the surveyed consumers don't plan to go to their local community center despite knowing about it, they see the value it brings to the wider community. Through these questions and the results, it's clear that there is a lot of support for community centers. In fact, this speaks to an environment where hearts and minds are extremely open to community organizations and what you do!

For the next data set, we borrowed the YMCA mission statements and asked consumers,

Do you agree community centers at large are fufilling those goals?

We felt this was a relevant way to measure the perceived impact in a more specific fashion. As a result, the data showed:

83% of respondents agree that "community centers promote healthy living."

87% of respondents agree that "community centers foster belonging and connection."

92% of respondents agree that "community centers benefit local families."

Key Takeaway

Now to summarize some of our learnings in section 2, we identified **several groups of respondents** that present an opportunity for community centers.

FIRST GROUP 18%

Those that do not know about a local community center but would participate in one if they came to learn about one in their area.

Objective: Raise Awareness

SECOND GROUP 13%

The next group are those who know about a local facility but have not participated in the last year.

Objective: Engage

THIRD GROUP 17%

The group of people you can reach by increasing the overall perception that community centers promote healthy living.

Objective: Educate

FOURTH GROUP 90%

The general perception of community centers bringing value to the community is extremely high.

Objective: Convert to members

Creating a very positive environment for you to make headway with the above-mentioned groups.

Section 3

Consumer preferences for recreation programming and activities

Finally for our last section, we asked consumers rank the following criteria they consider from most important to least important when choosing a community center.

More important

- Easy registration process
- Flexible payment options
- Ability to register for activities online
- Easy access to a user portal & overview of your account activity
- Options to pay in installments
- A safe facility with controlled access
- Ease of use of website
- Program variety
- Membership and program cost
- Quality of staff

Less Important

To provide the most insights possible, we chose to look at the results in 3 ways:

FIRST LOOK	SECOND LOOK	THIRD LOOK
Top 3	**Number 1**	**Top 5**
First, the factors that were ranked in the top 3 the most consistently.	the factors that were ranked as number 1 the most consistently	the factors that ranked in the top 5 most consistently.

FIRST LOOK

The factors surveyed consumers ranks that had most consistent podium finishes were:

Easy registration process	Ability to register for activities online	Flexible payment options
42%	**41%**	**39%**

The factors that had the most consistent podium finishes are part of the first interactions that a community member would have with your organization: first impressions are important. If customers encounter challenges when trying to register as members, sign up for activities, or find limited payment flexibility, it could potentially serve as an indicator of whether the organization aligns with their overall expectations.

SECOND LOOK

The factors surveyed by consumers ranked as the #1 factor most consistently.

Membership & program costs	Easy registration process	A safe facility with controlled access

Cost will never go away as an important factor, and this also gives additional weight to what we found in the previous section that value is extremely important. What came as a bit more of a surprise is that "easy registration process" was also found in the most often ranked as #1 factors.

THIRD LOOK

The factors that ranked the most consistently in consumers top 5.

Membership & program costs	Easy registration process	Ability to register for activities online
A safe facility with contreolled access	Quality of staff	Program variety

These are the ones that people selected not as top 1 or top 3, but they were selected consistently above average of the entire list of factors.

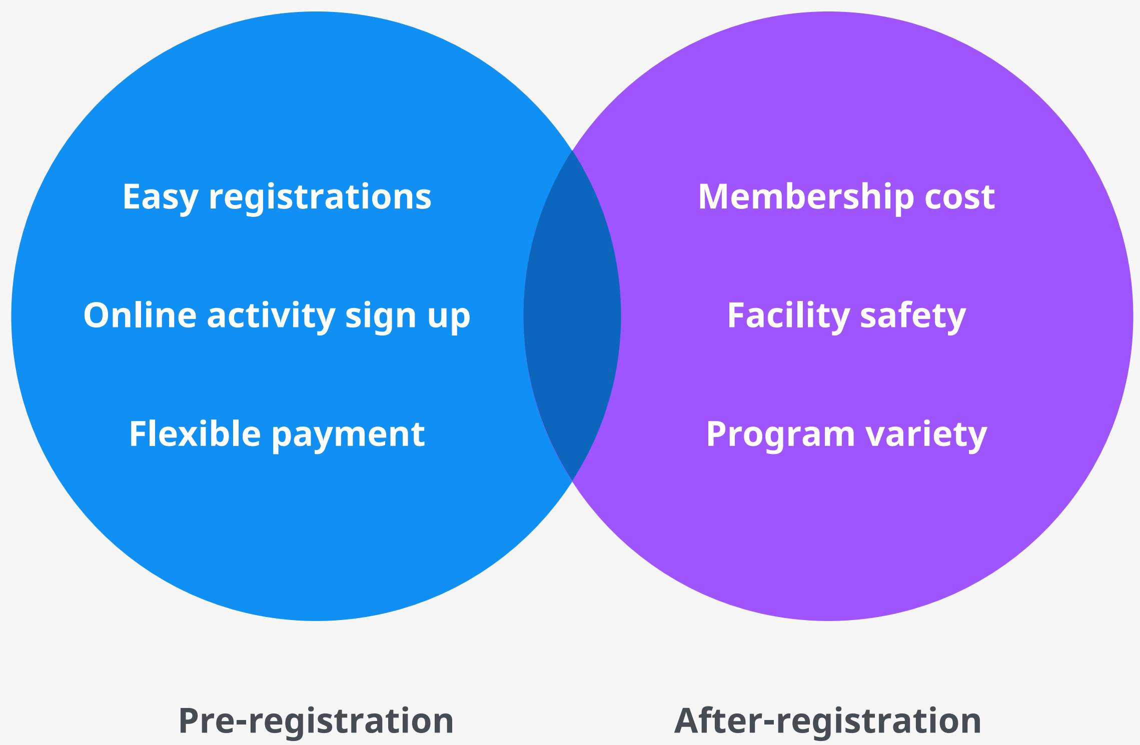
Let's Analyze

How many times have these factors came up

	TOP 3	TOP 1	TOP 5
Easy registration procress	✓	✓	✓
Membership & program costs		✓	✓
Flexible payment options	✓		✓
A safe facility with controlled access		✓	✓
Ability to register for activities online	✓		✓
Program variety			✓

When looking at the data from all 3 rankings at once, we observed two main groups of factors that appeared consistently across the different ways we looked to understand the surveyed consumers' priorities. We can see a big emphasis on the ease of interacting and the quality of interaction people experience and put them in to two groups: **pre-registration vs. after-registration**

Membership Experience



Again, first impressions are consistently ranking highly! It's not always top of mind, but it's close, and whenever people have another priority, first impressions are not far behind. Though the factors on the right are probably already a focus for your organization, the ones on the left seem to be another way we can close those gaps and take advantage of the opportunities we mentioned in the first two sections.

Another thing to really emphasize is the importance of not making it hard to interact and engage with your community center. If there are barriers to signing up, or paying, all the hard work you do with program planning, recruiting, and training staff, even ensuring the safety of your facility and activities could be having less of an impact on attracting and retaining participants.

Conclusion

Based on the first section of the survey, we can assume that within your community, there are a significant percentage of consumers who want to participate in more activities and recreation programming than they did last year. They also prefer to be able to do so at a single facility where they can interact in group settings and make connections. This means that consumers overall are looking for what community centers have to offer, though with the caveat that they are also looking for an incredible amount value for what they spend.

Moving on to the data collected in section 2, we discovered that 22% were not aware of a community center but that 80% of those people would attend a community center if they knew about it. We also discovered that there are 13% of people who are aware of, but do not engage with your facility. These are the people who you may need to tailor the offering for.

Now, beyond marketing efforts, how can you attract these segments of the market? Recognizing their value-oriented mindset, it may involve encouraging greater engagement within their existing membership benefits. There's also room to enhance the perception of promoting a healthy lifestyle and increase awareness of the diverse programs available. But in addition, when we looked at the factors in section 3, we saw that there are two main groups of factors that people consider most when deciding on participating in community centers. The pre-activity and then the quality of the activity. This shows that registrations, access to online registrations and payment flexibility should be considered a priority, along with the traditional factors you often focus on as a rec organization. The first impression matters as does the ease of how consumers can interact with your programming and ensuring that this aspect of the experience is at its best should definitely be a priority for 2024.

About Us

Founded in 2009, Amilia is on a mission to simplify the management of activity-based organizations. From registrations, scheduling, reservations, waitlists, staff, facilities, financial sustainability and more, Amilia is broadening access to technology for over 1,500 organizations. Its robust end-to-end solutions support small businesses, YMCAs, community centers, and parks & recreation agencies in their aim to engage their local communities.

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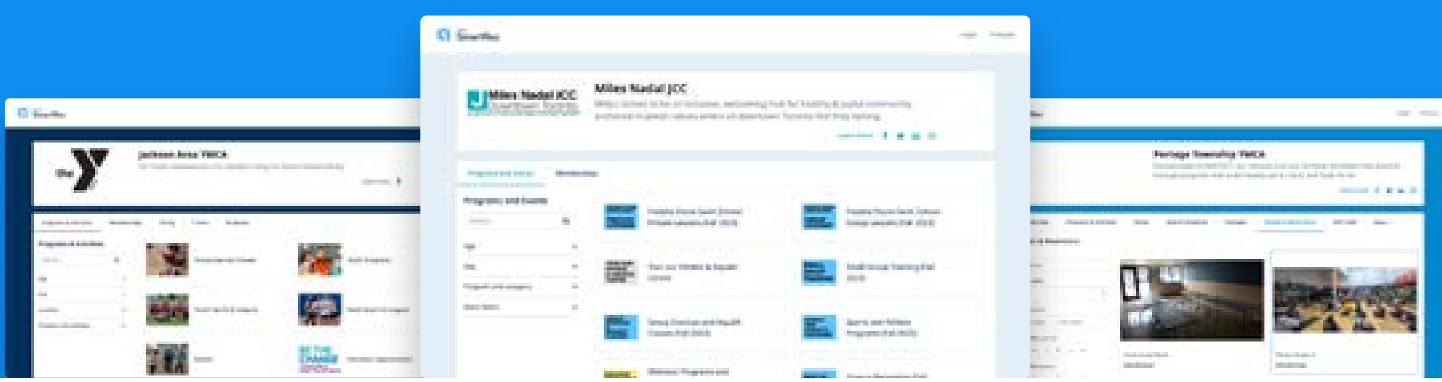

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