

Exploring
Ways to
Better Serve
Millennials

JANUARY 2019

A report
by the
Millennials
Work Group
appointed by

Columbia
Association

Work Group's Charge

■ To develop a report with recommendations that identify the opportunities for young adults and millennials (ages 17 to 35) to become more engaged in the Columbia community, including increased participation in CA's Sport and Fitness programs and activities.

■ As part of the Work Group's findings and identified recommendations, answer the following:

- What CA programs/facilities are millennials looking for?
- What are the best methods for engagement, interaction, and inducing participation?
- What facilities and programs are millennials seeking in Columbia and its environs?

Work Group Members

Amanda Bush, community member

Alyssa Hemler, community member

Hannah Herrington, community member

Jason Jannati, community member

Steven Lewis, community member

Christopher Lucas, CA team member

Josh Manley, community member

Nicholas Vavalle, community member

Bobby West, CA team member

CA Staff Liaisons

Jane Dembner, Director of Planning and Community Affairs

Jessica Bellah, Community Planner

This report was accepted by Columbia Association's Board of Directors on January 24, 2019

Table of Contents

Letter from Chair of Work Group	ii
Introduction: Planning for Millennials	1
CA’s Appointment of a Millennials Work Group	1
Section 1: Existing Conditions	3
Defining Millennials	3
Columbia as a Community of Choice	4
Population	4
Migration and Economics	5
Lifestyle and Housing	6
Millennials and CA	9
Section 2: Outreach and Engagement	12
Small Group Discussions	13
Survey	14
Engagement and Communication	16
Programming and Events	18
Millennials’ Relationship with CA	23
Serving the Needs of Current Members	23
What is Currently Missing for Millennial CA Members?	23
Why Previous Columbia Association Members Left	25
Reasons Why Respondents Are Not CA Members	25
Public Meeting	26
Summary of Public Engagement Findings	27
Section 3: Needs and Recommendations	28
A. Communication and Presentation of Information	28
B. Socializing and Gathering	31
C. Expanded and Targeted Programming	32
D. Cost of Living and Housing Affordability	34
E. CA Membership Structure and Pricing	35
F. Nightlife and Amenities	36
G. Barriers to Participation	37
H. Continued CA Millennials Engagement	38
Section 4: Implementation	40
Implementation Matrix	40

Graphics

Population Migration Map	4
Comparison of Millennial Population Across the Region	5
Cost of Living and Regional Affordability.....	7
Average Rent by Bedroom Size	8
Group Fitness Class Attendance by Facility and Age.....	9
Membership by Age Range	10
Facility Visits by Millennial Members	11
Health Club Membership by Age Segmentation	11
Millennials Work Group Process	12
Response Rate by Age Group	14
Number of Respondents by Age	15
Association with Columbia	15
Best Way to Contact, Engage or Share Information	17
Best Method of Contact by Age Group.....	17
Programs, Events or Activities Most Likely to Attend.....	19
Interest in Activities by Age Group	19
Most Needed in Columbia to Better Serve Millennials	20
Are You a Columbia Association Member?.....	22
Most Valued Columbia Association Offerings	22
What is Currently Missing in What Columbia Association Offers	24
Why Previous Columbia Association Members Left	25
What is the Primary Reason You Are Not a Member?.....	25

Dear Columbia Association Board of Directors:

On behalf of the Millennials Work Group, I would like to thank you for the opportunity to serve our community. After working together for almost a year, we are pleased to be able to report to you on ways Columbia Association can improve programming and opportunities for millennials, and ways millennials can engage in community life.

As a millennial and someone who grew up in Columbia, Columbia Association provided a beacon for our shared community values of equality, living in harmony with nature and promoting the growth of individuals. We were raised in a community where the content of our character mattered more than our last name; where people of different races lived as true neighbors and became friends; where school teachers could live next to business owners; and where we all had access to shared open space via the miles of Columbia Association pathways.

To us, Columbia embodies everything that is good about the American spirit and the belief that we are better and more effective together than we are alone. For those of us who have arrived more recently, we too have found that Columbia is a special place. However, I speak on behalf of our entire group when I say that we are honored to play a role in this community and are excited to help Columbia Association in its progression.

We worked together to gather the opinions and ideas of other millennials in the community. We learned about current Columbia Association programs and facilities. We combined what we learned with our experiences to develop recommendations for serving millennials better.

We have organized our recommendations in eight categories or themes. The themes are as follows:

- Communication and Presentation of Information**
- Socializing and Gathering**
- Expanded and Targeted CA Programming and Facilities**
- Cost of Living and Housing Affordability**
- CA Membership Structure and Pricing**
- Nightlife and Amenities**
- Barriers to Participation**
- Continued CA Millennial Engagement**

Within these themes, we identified practical recommendations that can either be directly implemented by Columbia Association or that CA can advocate for other organizations to implement.

In addition, we found that this effort, while informative — and I would bravely call effective — cannot and should not be the conclusion of our involvement in helping to shape our community to better understand and serve our generation. We recommend CA charter a Millennials Advisory Committee to continue this focus on millennials.

We are honored to serve and hope you find this report helpful and, most of all, actionable. To this end, the final section of this report focuses on implementation and highlights those recommendations that we identify as being priorities.

With gratitude,
Jason Shor Jannati
Chair, Millennial Work Group

Introduction

Planning for Millennials

Columbia Association's vision is to make Columbia a community of choice, now and for generations to come. To accomplish this, CA regularly evaluates potential changes and enhancements to its programming, services and facilities. CA has a uniquely expansive mission, serving both as a nonprofit community services provider — organizing events, maintaining Columbia's signature open space, providing support for the betterment of residents — as well as a commercial side, offering classes and programming through paid memberships for sport and fitness programming, and paid classes or services for other activities. CA's goal means it seeks to provide for the needs of everyone, designing programs to serve the wide range of ages, interests and abilities in the community.

Compared to national averages for sport and fitness health clubs, CA's share of millennial members is lower than expected given that millennials make up almost a quarter of Columbia's population — which raises the question of whether CA's current efforts are successfully meeting the needs and wants of this new generation. While a substantial amount of research has been done exploring the generational preferences, behaviors, and choices of millennials, CA wanted to hear directly from millennials who work, live, or come to play in Columbia.

Columbia Association seeks to provide for the needs of everyone, designing programs to serve the wide range of ages, interests and abilities in the community.

In fall 2017, CA announced the convening of a new Work Group tasked with providing ideas on how to reach, engage with, and provide exciting programming and activities for Columbia's millennial population. A call for community volunteers between the ages of 17 and 35 was issued, and there was a robust response to the recruitment effort. Of the many applicants who volunteered to serve, the Work Group's members were selected to represent a broad range of ages and backgrounds. Their identified goal was:

- To develop a report with recommendations that identify the opportunities for young adults and millennials (ages 17 to 35) to become more engaged in the Columbia community, including increased participation in CA's Sport and Fitness programs and activities.
- In addition to the Work Group's findings and identified recommendations, answer the following:
 - What CA programs/facilities are millennials looking for?
 - What are the best methods for engagement, interaction and inducing participation?
 - What facilities and programs are millennials seeking in Columbia and its environs?

Starting with its first meeting in February 2018, the Work Group diligently undertook this task, meeting monthly to understand CA offerings and lead a public engagement effort. This report summarizes the findings of these efforts and makes recommendations for how CA may better serve Columbia's millennial population. Some of these recommendations are specific actionable items that CA may use to evolve its programs, services and facilities as they relate to the needs and desires of millennials. Other recommendations have to do with Columbia overall, beyond the purview of CA. Other sections of this report detail unmet needs discovered by the Work Group that require further exploration beyond the scope of this project.

Following this introduction, the report is organized into four sections. The first section examines existing conditions, defining who is a millennial, summarizing national trends relevant to the exploration of millennial generational preferences and circumstances, and looking at local studies of Columbia and Howard County's characteristics. The second explores the public engagement activities the Work Group sponsored to learn from the public, specifically millennials. The next section identifies the broad issues and themes defined by the Work Group and its associated recommendations. The final section includes an implementation framework, outlining the timeframe, priority and group or agency responsible for implementation.

Section 1

Existing Conditions

Defining Millennials

As the Pew Research Center noted, “generations are analytical constructs, [and] it takes time for popular and expert consensus to develop [on their] precise demarcation”¹. Pew goes on to explain what typically goes into determining “who is a millennial,” including factors such as demographics, labor market, attitudinal and behavioral measures. These factors often translate to preference in both where and how a generation participates in their community and the translation of those preferences in spending on activities such as sport and fitness facilities. For the purposes of this study, millennials were defined as those aged 17-35 in 2018, or those born between 1983 and 2001.

As with every generation, this age cohort (group) is made up of unique individuals with diverse interests, coming from a variety of backgrounds, and aspiring to curate and settle into their own unique lifestyle. Nonetheless, during their transition from childhood into adulthood, many millennials were and are affected by shared experiences, events, and cultural shifts that help shape a collective identity. The growth and pervasiveness of technology and social media platforms, increased levels of higher educational attainment and associated student debt, concentration of economic opportunity in metropolitan regions, 9/11, and the Great Recession are only some of the critical defining moments that influence the priorities and shape the preferences of this generation.

Early on, the Work Group discussed how best to explore and reconcile these broad trends with the more specific effects of individual preference and circumstances that drive the participation choices of Columbia’s millennial population. The Work Group settled on a strategy of identifying similarities of life circumstances and need. Perhaps more than any other segment of the population, millennials represent an age cohort defined by rapid life-course transitions and changes in circumstance. It includes those recently graduated from high school, with some going to college while others choose not to. This youngest segment has varying degrees of ties to and support from their families, less financial means, and limited options for “going out,” since most are not yet of drinking age. Other situations include individuals who are settling into their stride as adults, beginning to find their career and potentially looking to purchase a house. Many millennials are heavily debt-burdened and/or making the lower end of their potential earnings. Others are starting to benefit from more financial security and stable incomes. It is a period in people’s lives often defined by several job changes and physical moves. Many millennials are recent transplants to the area, brought here by the strength of the regional economy, who may not yet have a social network in place and are looking for those connections. Another major grouping are those millennials with and without children.

The ease and speed with which millennials can move between these groupings translates to a certain degree of uncertainty, a desire for flexibility, and need for nimble adaptation by both the individual and the organizations they associate with.

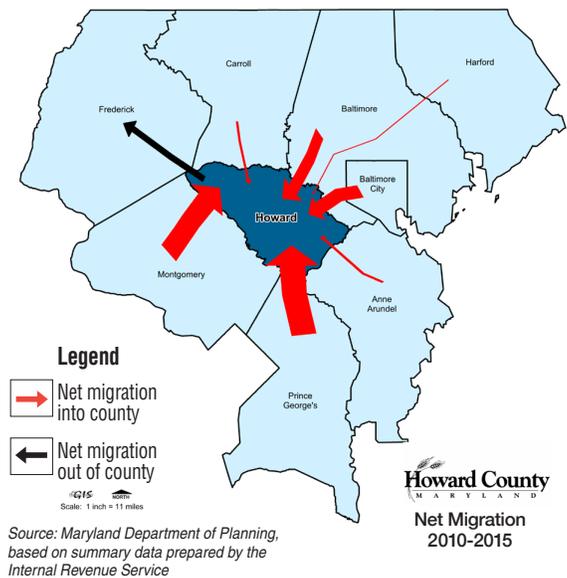
Columbia as a Community of Choice

Evaluating millennials' relationship to Columbia and to CA requires an understanding of their current demographic characteristics. This includes looking at broad national-level trends and how they play out at the regional level, understanding the context of Columbia, within Howard County, and within the Baltimore/Washington metropolitan region. Early in the Work Group's process, it wanted to understand how Columbia compares to other communities both in perception and reality.

Population

Despite being the smallest county in Maryland, Howard County is the sixth most populous and it continues to experience steady population growth, with an estimated 321,000 residents in 2017². From 2010-2015³, Howard County's total net population grew by an estimated 26,300 residents or about 9%, which includes domestic and international migration as well as natural growth. However, this number does not reflect the rather large amount of movement in and

out of the county. During these years, approximately 76,400 residents moved into the county and around 67,000 left. In general, most newcomers came from suburban Washington (Prince George's County and Montgomery County) and a smaller portion from the Baltimore area. With most of western Howard County maintaining its rural character, its eastern half is the economic and residential heart of the county, centered in Columbia. Depending on how the area of Columbia is defined, its population is estimated at approximately 100,000, about one-third of Howard County's total population.



In 2016, millennials made up about 27% of Columbia's total population. This is comparable to the percentage of millennials statewide and slightly more than the percent of millennials living in Howard County. Typical of growing suburbs, Howard County has historically had a greater percentage of school-aged children and their parents (representing age cohorts 5-19 and 35-59) and a much lower

percentage of those between the ages of 20-34. As millennials age in Howard County, this trend has continued with some slight growth in the number of young adults. In 2017, the median age in Columbia was 37.5 years old, which is slightly lower than the median age of Howard County (38.6), Maryland (38.3) and the U.S. (37.7).

Comparison of Millennial Population Across the Region						
Age group	Columbia		Howard County		Maryland	
	Population	% of Total	Population	% of Total	Population	% of Total
15-19 years	6,457	6.2%	21,568	7.0%	389,754	6.5%
20-24 years	6,160	6.0%	17,425	5.6%	400,581	6.7%
25-34 years	5,762	15.2%	38,364	12.4%	820,592	13.8%
Millennials	28,379	27.4%	77,357	25%	1,610,927	27%

Source: U.S. Census Demographic and Housing Estimates 2012-2016 American Community Survey Five-Year Estimates

The Census Bureau’s Columbia Census Designated Place boundaries do not include the Dorsey’s Search area but provide one of the most complete pictures of Columbia’s housing and demographic estimates through the annual American Community Survey program. In 2016, ACS estimated that of the 39,000 households in Columbia, three-fourths are family households. Family households are defined as two or more people living together related by birth, marriage, or adoption. About 35% of these are two-person households, 17% are three-person, and 22% of households have four or more people. 32% of households have children younger than the age of 18, which exceeds statewide (28%) and national (27%) representation but not Howard County’s overall percentage of households with children, which is closer to 36% of all households². Howard County and Columbia are both communities with a high percentage of families with children.

Migration and Economics

Young adults aged 20-29 traditionally have the highest migration rates, usually double the national average⁴ of any age group. Nationwide, the most common reasons for migrating are job- and housing-related, with stable levels of migration typically occurring during good economic conditions. For millennials, jobs and education are the primary drivers of migration. Millennials were among the hardest hit by the Great Recession, many graduating high school or college into a slowed job market, and according to the Census Bureau “the migration rate for young adults significantly declined from the recession period to the post-recession period” at higher rates than it did for other age groups⁴. Millennials who were living with their parents, enrolled in school, or not in the labor force migrated at much lower rates. The more educated and currently employed were one of the few groups who had less decline in migration patterns. According to the Census Bureau, a significant amount of movement occurred within and to metropolitan areas with low unemployment levels and low housing vacancy rates (which were taken as a indicator of stability in that metro area).

The Brookings Institution has noted over several studies that millennials are moving to metropolitan areas, primarily in the south and west, making up a greater share of their populations⁶. The D.C. metro area and Baltimore attracted a large number of millennials, with the District of Columbia having an unusually high share of millennials (34.8% of the population). Suburban areas like Columbia have experienced millennial growth both from in-migration but also the aging of youth into the 18-to-34-year-old young adult category over the 2010-2015 period, which occurs with less frequency in urban core areas⁵. Howard County sees a significant amount of residential migration from nearby Baltimore and suburban counties around the District of Columbia. During the Work Group’s study, it found that when deciding where to live, millennials are looking for a combination of affordable housing, their preferred lifestyle amenities and proximity to jobs, often in that priority order.

In 2017, about 44% of Howard County residents also worked in the county, while about 56% commute outside the county for work. The number of commuters traveling out of and to the county is fairly close, so while there is a fair bit of traffic, the daytime and nighttime populations remain about the same. Columbia is uniquely situated in the region between the city of Baltimore and the District of Columbia, two major job centers.

Lifestyle and Housing

Columbia is uniquely situated to capitalize on the preferences of the millennial generation. Comparable to a small city, Columbia’s scale may be appealing to those looking for the “right” fit between urban and suburban living, while also maintaining close proximity to major regional centers of employment. Given its proximity to Baltimore and D.C. in addition to its own attractive attributes, Columbia is set up to capture a large share of the region’s millennial population, especially as they continue to age into major life transitions. Columbia is in a transitional period, seeing renewed growth in its downtown area and the opportunity to also provide the amenities and environment of an urban core, in addition to the expansive green space and suburban neighborhoods it is known for.

Columbia has two major hurdles in attracting and retaining millennial residents: the perception that Columbia is too expensive to live in, and that it is set up to cater to families rather than singles or couples.

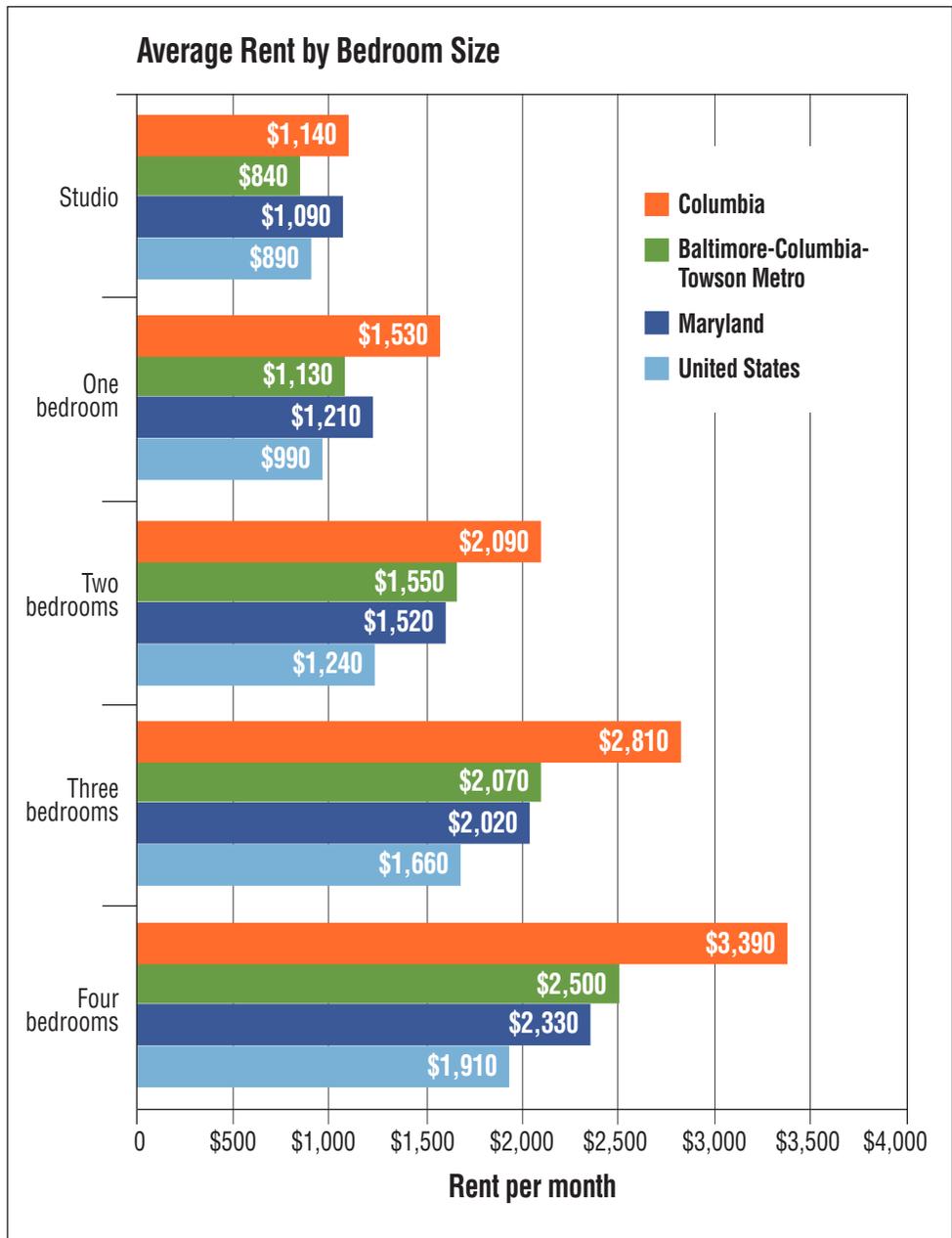
Affordability and cost of living are at the forefront of most millennials’ minds when it comes to assessing communities and services. The Work Group members felt there was certainly the perception that Columbia was too expensive to live in and were curious if there was data available that supported or refuted this perception. Sperling’s “Best Places to Live” offers various cost-of-living calculations and is one tool for assessing this question. The site states that Columbia’s cost of living is significantly higher than comparable attractive urban areas like Baltimore, but competitive with wider Howard County and adjacent counties. The high cost

of housing throughout the region is of particular concern since millennials are less likely than prior generations to have the savings and means to purchase a home⁵. There was also interest in comparing Columbia’s cost of living to the income levels of its millennial residents; however, there was not a reliable source for conducting this research.

Cost of Living and Regional Affordability				
	Columbia	Howard County	Montgomery County	Baltimore
Cost-of-living compared to U.S. average	35.1% higher	50% higher	57% higher	2% less expensive
Housing cost compared to U.S. average	85% higher	134% higher	138% higher	40% less expensive
Median home cost	\$346,800	\$438,000	\$444,500	\$112,900

Source: *Sperling's best places to live, December 2018*

The perception that Columbia’s cost of living is prohibitive is primarily tied to the cost of housing in and around Columbia, including housing type and whether someone is a renter or a buyer. Millennials who engaged in this study said they struggle to find rental apartments they can afford, noting that the Baltimore area provides more bang for their buck, with a bonus of housing options located near amenity-rich areas that fit a lifestyle of walkable entertainment near culinary scenes. Many felt that the cost to rent in Columbia was equivalent to D.C. prices, without providing equivalent value or “things to do.” It is difficult to evaluate differences in rental prices directly between Columbia and Baltimore or D.C. without knowing which neighborhoods or areas of these cities participants are comparing Columbia’s rental options to. Sperling’s Best Places to Live does provide some analysis of regional rental prices for the Baltimore/Columbia/Towson metro area.



Source: Sperling's best places to live, December 2018

Nationally, millennials who purchase homes are more likely to look in suburban areas that have a mix of suburban and urban features defined by affordable communities with “pedestrian-friendly retail areas, quick access to open green space, and popular public schools”⁸. While Columbia has many of these attributes, it does not provide the modern urban core and associated amenities that cater to singles, couples in addition to families. Millennials responding to the Work Group’s survey repeatedly mentioned the need for a central hub or gathering area that remained open later. The National Association of

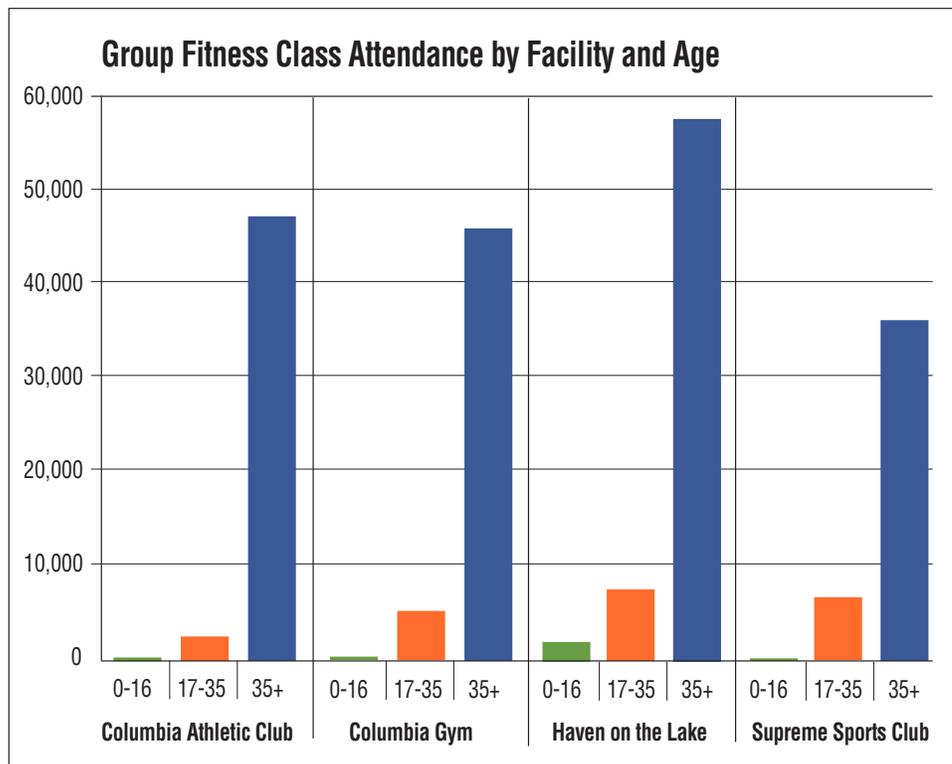
Realtors call this the “18-hour city,” the most attractive of which boast “green spaces, historic architecture, affordable housing stock, arts community and vibrant nightlife.” As the real estate industry studies the effect of millennials on their industry, key takeaways are that millennials are looking for affordable, turn-key or new houses in areas close to nature with convenient and accessible outdoor recreation. “According to the National Association of Realtors (NAR), 57% of millennials are buying in suburbs, followed by 16% in small towns and 15% in urban areas”⁹.

Millennials and CA

Parallel to its work understanding the demographic characteristics of Columbia’s millennials, the Work Group also explored CA’s current operations, amenities and services. It was most curious to know how the existing CA millennial members are using CA facilities or classes and wanted data-driven measurements to help evaluate where CA is best serving millennials. Included in this line of inquiry was whether millennial participation was increasing or declining, when and what classes millennials attended, whether these classes reflected a mix of age groups, which membership plans were most popular and what the membership rates were.

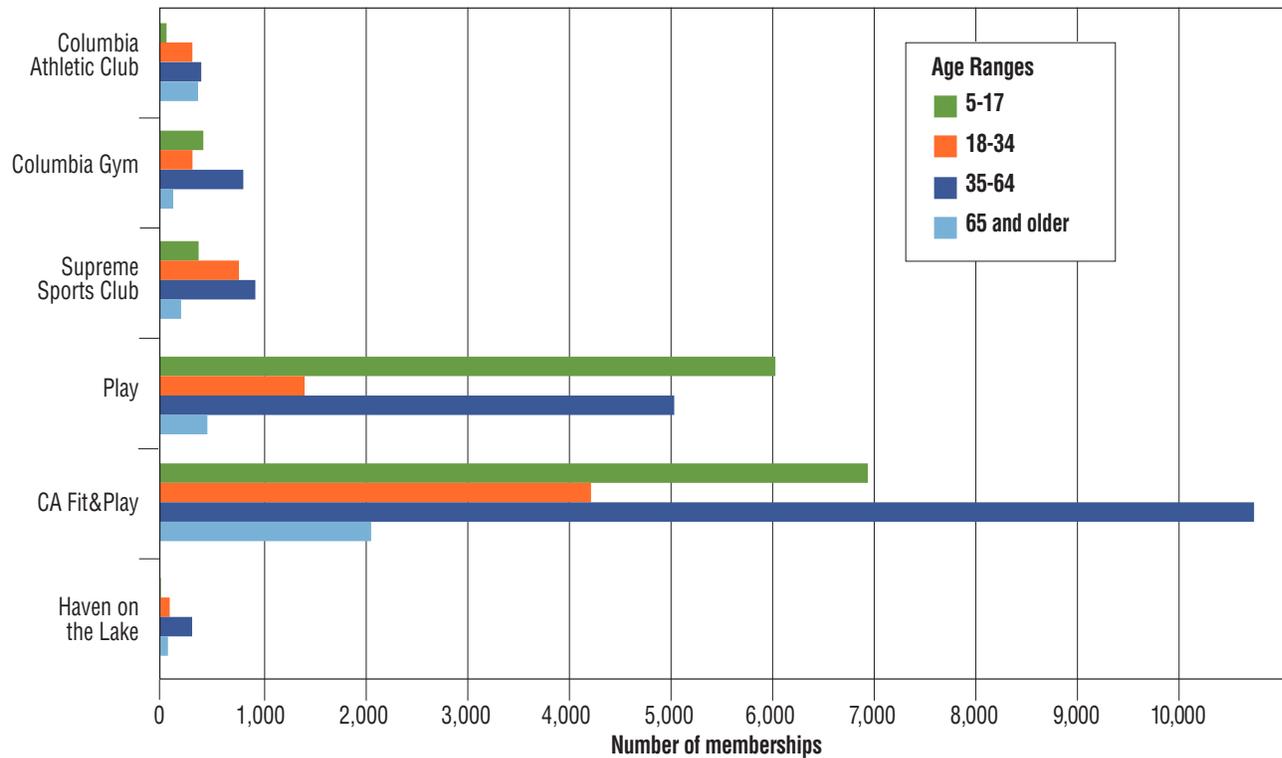
CA’s current class and facility attendance data system (Spectrum) is not designed to easily track attendance by age or to quickly test for these questions across a specific age group’s usage of facility, class or program offerings. The database platform CA uses is really designed to drill into the metrics of performance for a particular class rather than perform trend line or aggregate data analysis. It was difficult to evaluate what classes are most popular with millennials, since there is so much variation in class offerings, time slots, instructors, and so on. Classes also change over rapidly enough that it would be difficult to track trends in usage and ascribe any particular correlation between these factors to millennial interest in that class. CA has designed classes to appeal to a variety of interests, with programs changing over time to reflect demand.

To provide a snapshot of millennial participation in CA offerings, CA’s analytics



Source: Group fitness attendance data between May 2017 and March 2018, Columbia Association

Membership by Age Range



*Golf memberships are not represented in the chart.

Source: Group fitness attendance data between May 2017 and March 2018, Columbia Association

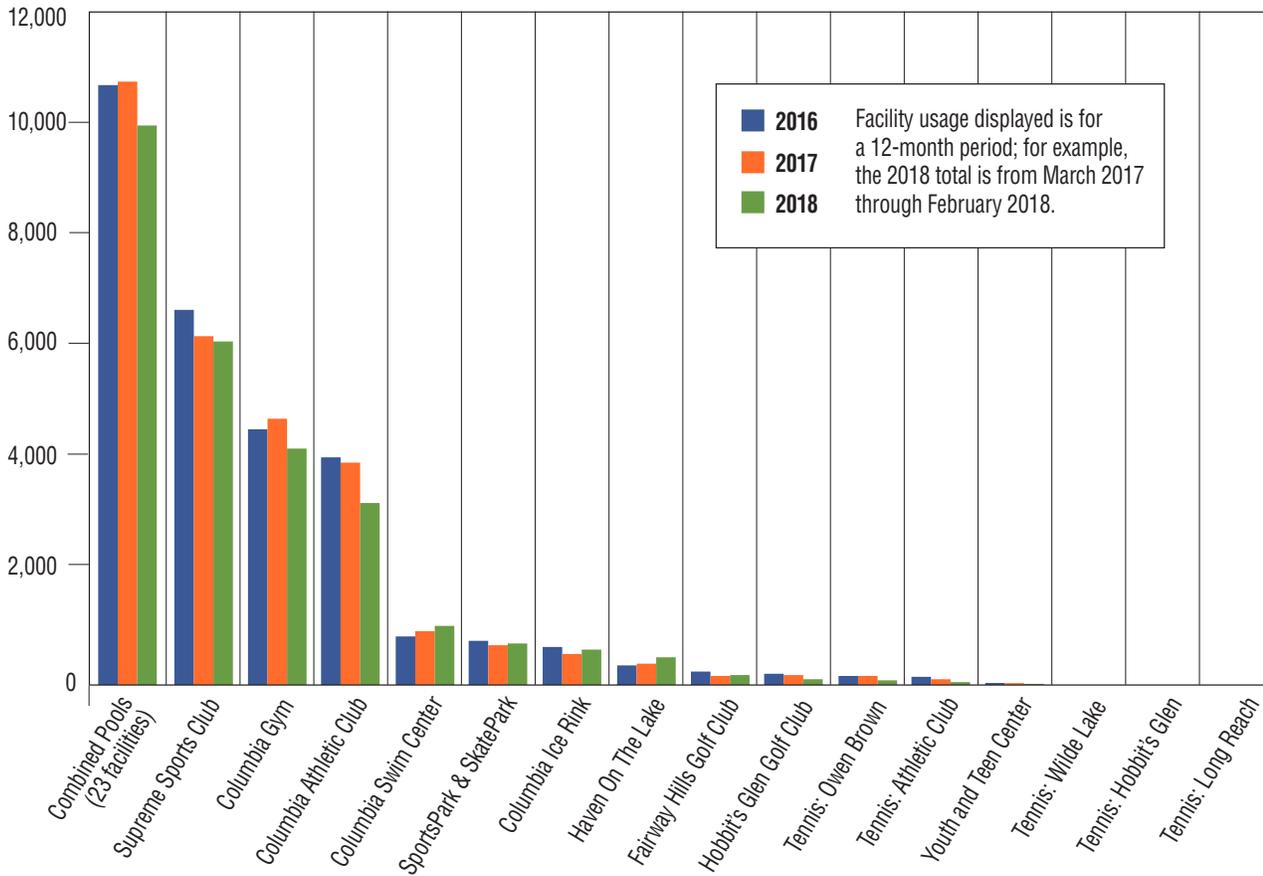
team analyzed almost a year’s worth of CA group fitness class attendance data (between 5/1/2017 and 3/31/2018) to give the Work Group some insight into which classes are most popular with millennials. Millennials are most likely to attend classes at CA’s Haven on the Lake facility, which offers mind body movement classes and has dedicated pilates and yogas studios, and healing environments. CA’s three gym facilities all offer a variety of class types, with millennials most likely to attend those offered at Supreme Sports Club. Millennial preference in group fitness classes closely mirrors that of all age groups, with BodyPump classes far exceeding the attendance averages of all other classes, followed by studio cycling classes, and mind and body wellness classes such as yoga.

CA’s membership data system was better able to provide membership type preference and facility usage by age. The number of single facility memberships aligned closely with millennials’ most popular facility: Supreme Sport Club. The fact that it is the only facility open 24/7 and thus able to accommodate a wide range of workout hours is likely the primary reason for this preference.

The membership type most popular with millennials was the CA Fit&Play membership. This is not unexpected given that, collectively, pool facilities are by far the most visited CA facility, and millennials who responded to the Work Group’s survey said what they most valued about their CA membership was the variety of amenities they could access.

The International Health, Racquet & Sportsclub Association prepares an annual report on industry trends, providing insight on what services Americans are looking for from their sport and fitness clubs. Their 2017 Health Club Consumer Report

Facility Visits by Millennial Members



Source: Facility attendance data between March 2016 and February 2018, Columbia Association

shows that the millennial generation does spend a substantial portion of their disposable income on sport and fitness, and that millennials in particular are leading the growth of smaller studio and niche gyms that offer personal and small group training. The report provides national trendline data on rates at which particular age cohorts hold sport and fitness memberships. To understand how CA compares to national averages for fitness club memberships, the Work Group looked at Columbia's population broken down by age cohort and compared the percent of CA fitness club membership subscriptions to the national averages for similarly aged populations in 2017. Two age cohorts stand out: a lower percentage of older millennials (25-34 year olds) and older adults (65 and older) hold CA memberships than national trends.

CA membership rates by those aged 0-24 far exceed national trends for this age group. However, IHRSA does not further break down this age group to allow for comparisons on whether family-aged children (younger than 18) are the primary drivers of the trend or if it is made up of younger adult millennials.

Health Club Membership by Age Segmentation

Age group	National health club membership	CA membership	Columbia population
0-24	23%	39%	31%
25-34	18%	9%	15%
35-44	18%	16%	14%
45-54	16%	16%	14%
55-64	11%	11%	13%
65+	14%	9%	12%
Total	100%	100%	100%

Source: 2017 IHRSA Health Club Consumer Report, Columbia Association

Section 2

Outreach and Engagement

The Work Group developed a public engagement strategy focused on helping answer the questions raised during their initial exploration of the demographic characteristics of Columbia’s millennial population, CA’s current offerings, and their monthly meeting discussions. It set dual goals of soliciting more information from the community and testing the early ideas and recommendations the Work Group had been developing during its monthly discussions. A summary of these civic engagement and outreach efforts is included in this section.

Millennials Work Group process



Small Group Discussions

Kicking off its civic engagement and outreach efforts, the Work Group developed a series of questions to be explored in a conversational setting. Invitations to participate in a small group discussion session were sent to 40 individuals ages 17-35 who had previously expressed interest in participating in this project. Twenty-two of those solicited signed up to participate in the small group discussions and were invited to attend one of three sessions held on June 4, 7, and 12. Ultimately, 13 of those who had signed up to attend participated in the discussions. Trained volunteers from the Mediation and Conflict Resolution Center of Howard County served as facilitators for the discussions.

The small group discussion session explored a range of topics, including what initially attracted participants to Columbia and how they viewed the community. It asked them to think of one new thing they would add to Columbia, what was missing, and to describe facilities or amenities they had seen in other communities and wished Columbia had as well. The conversational setting lended itself to a broad discussion of both CA's position in the community and Columbia as a whole.

The small group discussion session explored a range of topics, including what initially attracted participants to Columbia and how they viewed the community.

The discussions reflected a desire for a large-scale transformation of Columbia with enhanced public transportation, walkability, more jobs and housing affordability, which requires investment by regional agencies, Howard County, its residents, and its commercial sector. When it came to picking only one thing that Columbia needed to better serve millennials, most participants focused on the need for placemaking and the creation of unique establishments and events. It was clear from these discussions that the private sector has a large role to fill in recruiting unique non-chain businesses to Columbia and designing indoor and outdoor spaces that tap into the unmet demand for entertainment and socializing destinations. Feelings of the 13 focus group participants were mixed on whether the redevelopment of the Downtown Columbia area will meet this need.

The conversations also explored the awareness of and satisfaction of participants with CA's current programs, facilities, and services and the best ways to reach out or engage with them about CA offerings. Participants who were currently CA members expressed satisfaction with their CA experiences, but said that not knowing where to look for details like hours of operations and class structure meant they rarely participated. Participants often discovered CA and other community events either through work or by hunting them down on the website after hearing about them by chance.

Once participants began making recommendations on how facilities and programs could be improved, it quickly became apparent that CA's methods of communicating and sharing information are not effectively reaching intended audiences. Participants were asking for classes, services, and programming that

is already being offered, or had previously been offered but had poor attendance. Participants were surprised by this, noting they had no idea these offerings existed. Further discussion revealed that most of the small group discussion participants struggled to locate information, noting specifically that CA’s website was difficult to use and they could not “figure it out.”

Survey

Based on feedback from the small group discussions and all it had learned in the previous months of exploration, the Work Group started to identify emerging themes on what millennials were thinking about Columbia and CA. They then utilized Survey Monkey to develop a survey with three main questions:

1. What is the best way to contact, engage, or share information with you?
2. Given a list of options, what programs, events, or activities would you be most likely to attend or participate in?
3. If you had to pick only one thing, what does Columbia (whether via CA or others) most need to better serve millennials?

The survey also asked respondents whether they were Columbia Association members. Those who responded “yes” were asked what they valued most about what CA currently offers and what was missing in what CA offers. Those who responded that they were not currently a member but had previously been one were asked to explain the primary reason they left. And those who had never been a member were asked what their primary reason was for not becoming members.

In addition to its normal distribution methods, CA’s Communications and Marketing team also assisted in developing a strategy for a targeted Facebook campaign to distribute the online survey to those Columbia-based residents/employees aged 17-35.

Response Rate by Age Group		
Age range	Total responses	Percent of total
17-20	57	7%
21-25	130	16%
26-30	274	34%
31-35	345	43%

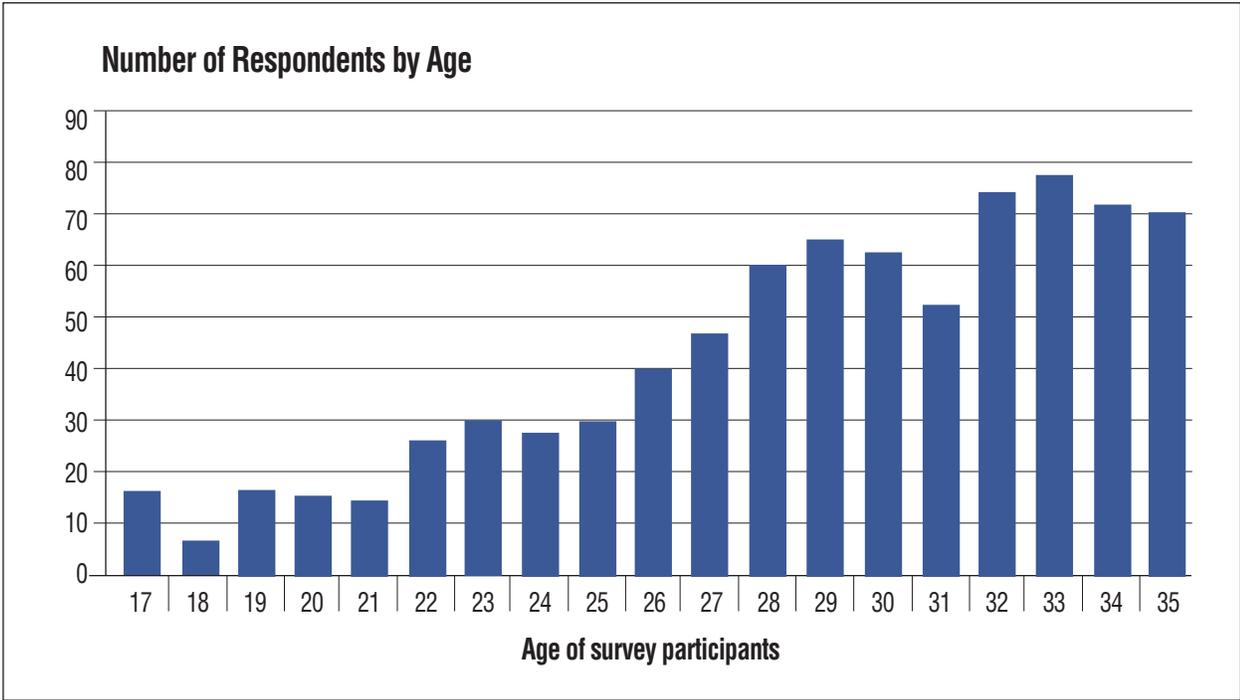
Source: CA Millennials Work Group Survey, July 2018

Results and Analysis

The survey closed with a total of 820 recorded responses. Of those, 806 were provided by the survey’s target millennial demographic range of individuals between the ages of 17 and 35.

As demonstrated by the age cohort breakdown within the survey’s response rate, the majority of survey respondents skew older. In order to capture any notable differences in responses among the age groups, the chart analysis in this section provides a breakdown in response type by age group.

Millennial residents of Columbia were the primary respondents to the survey at 74%. A large number of participants (31%) were nonresidents who worked in Columbia or those who neither worked nor lived in Columbia (17%), while 20% of respondents both worked and lived in Columbia.



Source: CA Millennials Work Group Survey, July 2018

Association with Columbia	All respondents	Age group			
		17-20	21-25	26-30	31-35
Live in Columbia	74%	77%	75%	69%	76%
Work in Columbia	31%	37%	41%	32%	25%
Both live and work in Columbia	20%	30%	29%	19%	16%
Neither, but occasionally shop/visit	17%	18%	13%	19%	16%

Source: CA Millennials Work Group Survey, July 2018

Response rates were also broken down within the millennial generation by age cohort, with younger millennials being more likely to both live and work in Columbia.

Engagement and Communication

The Work Group was tasked with exploring the best methods for increasing engagement, interaction, and inducing participation from Columbia's millennial population. Probably the most resounding discovery of the Work Group during its early explorations is how much CA does, and correspondingly that a significant portion of the population is unaware of it. CA's website in particular was raised as a major weakness of the organization and an area in need of improvement.

Both the small group discussions and the survey revealed that millennials are very interested in knowing what is happening in their community and aspiring to be part of it. However, many reported that although there were lots of activities going on, they felt they never saw advertisements or fliers for them and were rarely aware of them in time to participate. The overall sentiment was that it is not very easy to learn about CA or community events and that the current methods of outreach are not effective.

Older millennials prefer Facebook and email while younger millennials use Instagram and Twitter

The Work Group's survey results show that the preferred method of being contacted or having information shared are via Facebook and email or listserv, followed by Instagram, and finally the website. Since the survey itself was most heavily advertised through these methods, this is not a surprising result. CA currently operates and provides information via all of the preferred engagement methods, including e-newsletters and a presence on social media platforms, but current operations do not appear to be effectively reaching target populations.

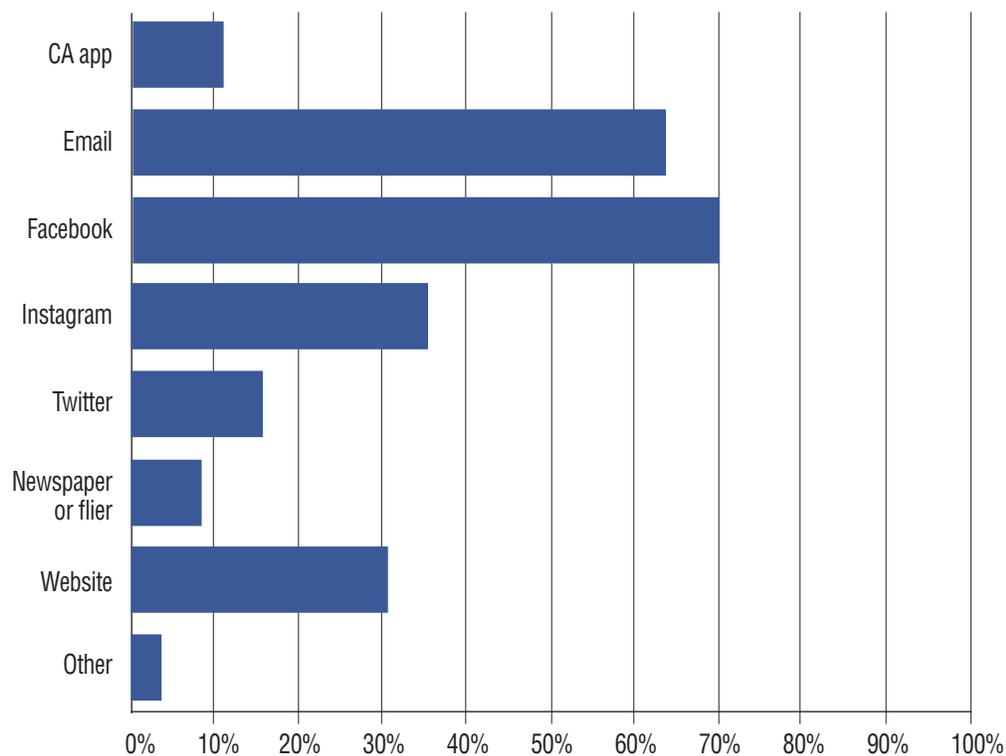
Some recommendations have been developed on how these efforts might be improved and are outlined in the recommendations section.

In addition to these electronic communication preferences, the Work Group discovered that millennials said they were more likely to act on information or participate when they learned about an upcoming opportunity through word-of-mouth. This desire for human interaction was reiterated in response to many different questions during the small group discussions, with the small answer sections of the survey and through feedback given at the public meeting. There was also the desire to have physical announcements via community board fliers or to have representatives of CA attend community events and speak with people about upcoming opportunities.

There was a one-week delay between when the survey went live through advertisement on CA's website, facility monitors, and e-newsletters, and when the targeted Facebook advertising went into effect. There was a marked increase in the selection of Facebook as the preferred communication source that correlates with how respondents accessed the survey.

The preferred contact/engagement method for the survey's younger respondents differs substantially from older respondents when comparing social media platforms

What is the best way to contact, engage, or share information with you?



Source: CA Millennials Work Group Survey, July 2018

Best method of contact	All respondents	By Age Group			
		17-20	21-25	26-30	31-35
Facebook	70%	43%	74%	73%	71%
Email	64%	48%	57%	70%	64%
Instagram	35%	50%	33%	37%	32%
Website	30%	32%	29%	32%	30%
Twitter	16%	36%	20%	16%	11%
CA app	11%	7%	8%	12%	12%
Newspaper or flier	9%	9%	9%	8%	9%

Source: CA Millennials Work Group Survey, July 2018

such as Facebook, Instagram and Twitter. About 30% of respondents selected “website” in all age categories, making it the most consistent answer, if not the most popular. More than anything, this shows the need to maintain a presence on multiple platforms and adapt to changing preferences in social media use.

Programming and Events

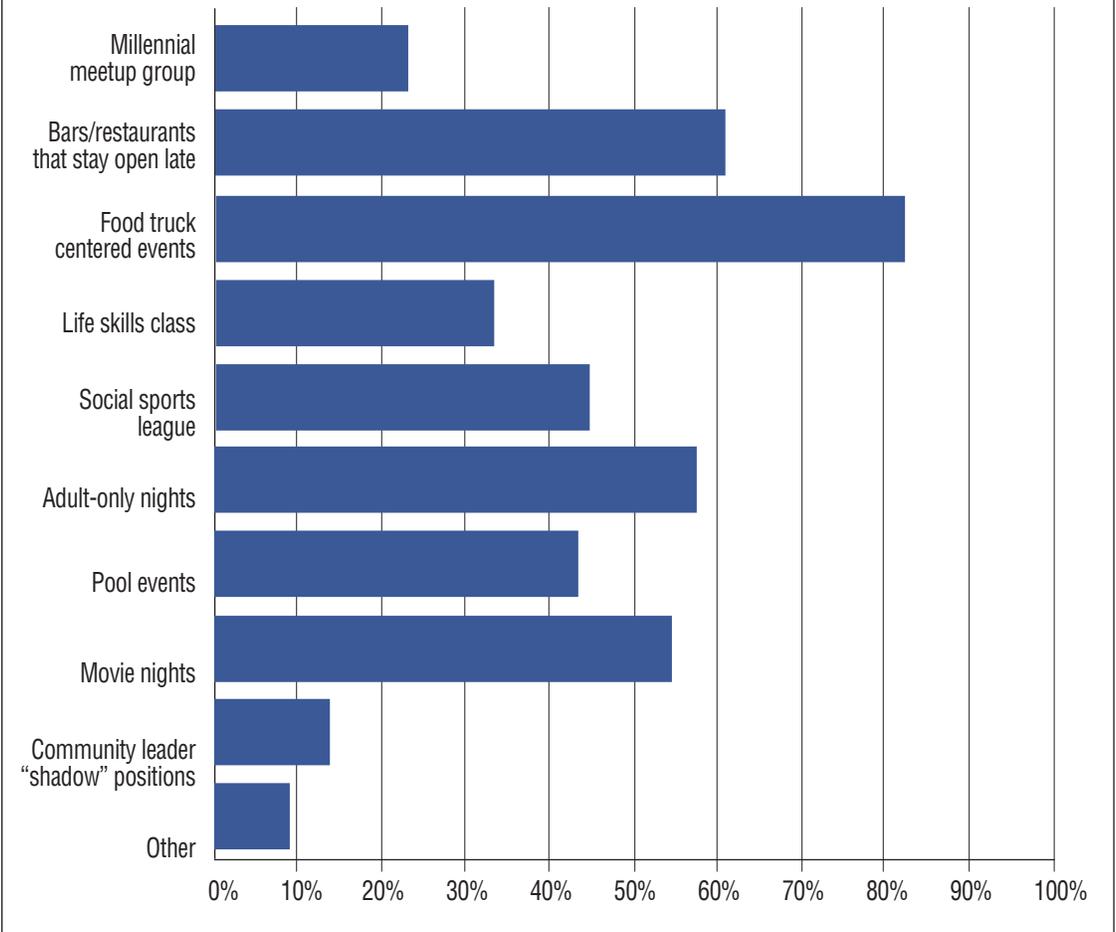
The Work Group designed a question on the survey that would gauge interest both in new types of programming and in confirming continued interest in existing programming. Millennial culture in the Baltimore/D.C. metro area has grown around interest in a vibrant culinary scene — specifically in a desire to have unique, authentic, local food options that are not part of a national chain. Food trucks were one of the most popular features that could be introduced to programming and events. Their appeal was described as an opportunity for people to informally socialize, explore unique culinary experiences and allow participants to select different food styles and then hang out with each other. Brick-and-mortar bars and restaurants were the second most popular answer, followed by adult-only nights, with an emphasis on these establishments or events that stay open late and support a nightlife scene. In fact, the top five most popular activities centered around the ability to meet up away from one’s home and socialize.

For millennials interested in taking advantage of CA programming and group fitness options, a noted barrier was that they did not have a social network to attend events or classes with or were too intimidated to join in on their own. Further exploration revealed this intimidation derived from 1) a desire to attend classes where a significant portion of other participants would be millennials, and 2) inexperience with the material or “class culture.” Classes held at Haven on the Lake were noted specifically as intimidating to members without previous experience in the course material. Another barrier to participation was a mismatch in members’ schedules and the times classes are being offered. It was recommended that the events/classes needed to have extended hours offered at a variety of times during the day, especially in the early morning and late evening to accommodate long work and commute hours.

There were not many specific responses given in the “other” category answer, although a few respondents mentioned wanting more outdoor programming or meetup groups surrounding outdoor activities, and several respondents commented on the desire to go to venues/events where they could bring young or infant children but still enjoy them as adults.

Predictably, those respondents below the legal drinking age were less interested in venues/events centered around alcohol and instead had the greatest interest in movie nights and pool events. Recently of-age participants in their early 20s indicated an interest in late-night restaurants and bars at rates significantly higher than both younger and the oldest millennials.

Of the following programs, events, or activities, which ones would you be likely to attend or participate in?



Source: CA Millennials Work Group Survey, July 2018

Interest in	All respondents	By Age Group			
		17-20	21-25	26-30	31-35
Millennial meetup group	22%	18%	30%	25%	16%
Bars/restaurants that stay open late	60%	56%	82%	65%	49%
Food truck centered events	81%	75%	84%	82%	80%
Life skills class	32%	35%	38%	35%	27%
Social sports league	44%	49%	47%	51%	35%
Adult-only nights	59%	44%	65%	72%	48%
Pool events	43%	53%	40%	44%	42%
Movie nights	53%	68%	48%	58%	49%
Community leader "shadow" positions	13%	19%	12%	12%	13%

Source: CA Millennials Work Group Survey, July 2018

What one thing does Columbia most need (whether via CA or others) to better serve millennials?		
	Response count	Percent of valid responses
Total responses recorded	645	
Total valid responses	593	
Total “too general”	59	10%
Summary category		
Affordable housing/general cost of living	79	13%
More club/bar/music venues and/or nightlife scene	77	13%
Adult social gathering: places and activities	63	11%
Improved alternative transportation (transit, bike and walkability)	52	9%
Non-chain restaurants and businesses	41	7%
Improve communication/technology interface	24	4%
More/different restaurants	24	4%
Membership cost/pricing structure	23	4%
Town Center/centralized hub	20	3%
Change in existing CA programming	15	3%
Free/low-cost events	12	2%
Additional parks/outdoor amenities	11	2%
Small scale/neighborhood festival	8	1%
Transit connection to D.C./Baltimore	7	1%
Slower/less development	7	1%
Adult venues with kid-friendly space	6	1%
Membership structure	6	1%
More dog-related activities/amenities	5	1%
Adult-only/kid-free event	4	1%
Place-making (public art, community expression)	4	1%
Misc. (three responses or less per topic)	28	5%

Source: CA Millennials Work Group Survey, July 2018

In designing the survey, the Work Group tried to balance collecting as much information as possible and keeping the survey length short and accessible. One of the most important questions was an open-ended request to hear directly from millennials on what one thing they think is needed from CA or other community stakeholders to better serve them.

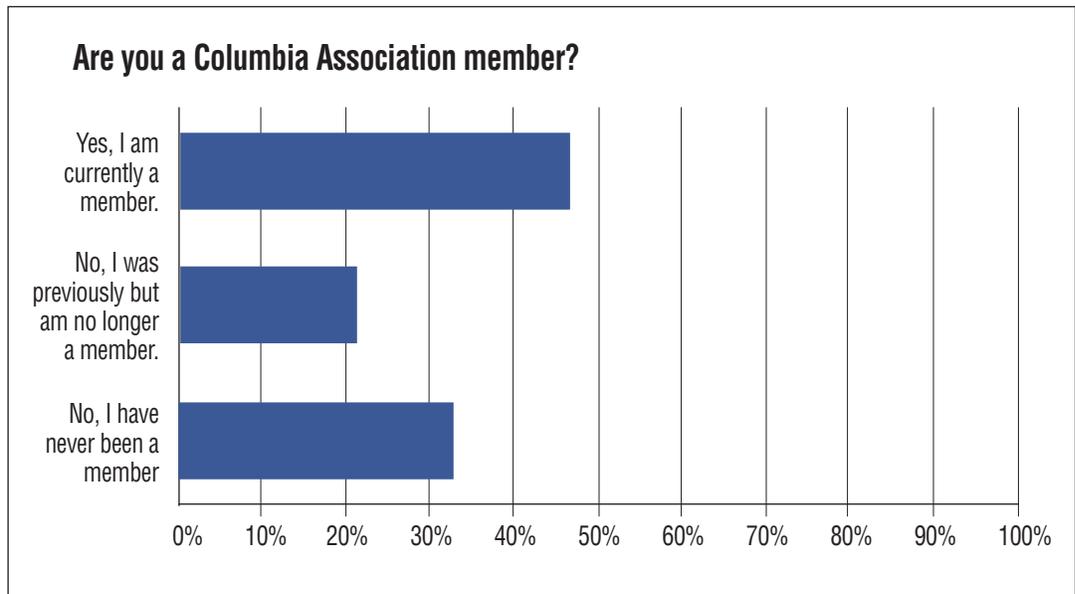
As an open-ended question, the level of detail and slight variations in verbiage are challenges in identifying themes within the responses. To assist in this process, an attempt was made to identify some summary categories that similar answers could fit within. Those have been identified as the following:

The code “N/A or invalid response” was used to separate out those answers where respondents either wrote in N/A, indicated they had nothing to add, or left deliberately offensive or provocative commentary without substance. These were removed from the calculations of summary category percentages so as not to skew the trend numbers for other responses. Unfortunately, although several respondents made good-faith efforts to indicate a desire for events, activities, programs or other improvements to serve young adult populations, their responses were too general to be interpreted into a specific program or event request. These responses were included in the calculations under the summary category “too general” but still count toward the number of total valid responses. Examples of comments of this nature include things like “more things to do,” “more events for millennials,” “more exciting or cool events.”

Four notable summary categories emerged from the open-ended response question, and the themes of these categories are expanded on below:

Social Gathering Opportunities: One of the most interesting results from the survey was the number of participants who expressed a need for more social gathering opportunities. This category encompasses a wide variety of examples but is united by the centralized theme of respondents searching for a way to meet other millennials and interact with their community. The responses included a desire for informal gathering areas and permanent establishments as locations at which to gather. It included a desire for local recurring events spread throughout the community to draw out their neighbors and programed activities such as an adult social sports league, which was requested by several respondents.

Unique Restaurants and Businesses: A desire for non-chain and unique establishments was expressed, with survey participants noting that they often went to Baltimore or D.C. to explore neighborhoods full of these small or unique businesses. Some identified the desire to improve the village centers as culinary destination hubs. Others hoped that parts of Downtown Columbia could become a central food/drink destination reflecting a walkable urban streetscape similar to the U Street Corridor in Washington, D.C., or Fell’s Point in Baltimore.



Source: CA Millennials Work Group Survey, July 2018

For current members, what do you value most about what CA currently offers?

	Response count	Percent of valid responses
Total responses recorded	295	
Total valid responses	285	96%
Summary category		
Variety of offerings	66	23%
Facilities: pools	52	18%
Facilities: gym	50	18%
Pathways/trails	25	9%
Events/programs	20	7%
Open space/green area	18	6%
Convenience/proximity	13	5%
Sense of community	11	4%
Classes	8	3%
KidSpace (child care)	6	2%
Discounted rate and/or pricing	5	2%
Misc. (two responses or less per topic)	10	4%

Source: CA Millennials Work Group Survey, July 2018

Improve Communication/Technology Interface: Similar to the responses received during the small group discussions, survey participants said they wished they had an easier way to learn about the current events occurring throughout Columbia and wanted an improved technological interface through either the CA website and/or an app.

Membership Structure and Pricing: While individual responses differ, most of the respondents who indicated these categories advocated for more flexibility with CA's membership structure and plans. To some, this meant being able to have a non-consecutive month-to-month options and several mentioned wanting a pool-only summer membership plan.

Millennials' Relationship with CA

Given the Work Group's charge of recommending programming and facility changes that might be needed to better serve millennials, the survey provided an opportunity to hear directly from CA's millennial members on what they liked most about what is currently offered and what they think is missing. It also provided the opportunity to learn why previous members may have discontinued membership and what may be preventing new members from joining CA.

Almost 47% of survey takers were current CA membership holders, 21% had previously been members, and about 32% have never been members.

Serving the Needs of Current Members

Respondents who indicated they were CA members were asked to describe what they valued most about CA's current offerings, and they were then asked a follow-up question on what they felt was missing. The top answer to what they most valued was the variety of facilities/programming offered by CA, with respondents either indicating this directly or listing so many things that they fell into this category. CA's strength is clearly in the wide diversity of its facilities and programming. For those respondents who listed both the gyms and pools, the counts took the first item as the one most valued. For those who listed the gyms as the thing they valued most, several respondents specified Supreme Sports Club's 24/7 schedule as the primary reason. Lifestyle and outdoor amenities such as the pathway system and open space areas maintained by CA were also highly ranked. This feedback corresponds well with what the Work Group learned about millennial preferences for the environs of their community.

What is Currently Missing for Millennial CA Members

Echoing a major theme discovered throughout the public engagement process, CA's current millennial members indicated that they wished CA could foster more environments and opportunities for social interaction. They mentioned wanting things like smaller, more intimate events and for CA to sponsor classes, meetups or leagues. Many respondents indicated that the current preregistration system to sign up for classes did not meet their needs and were frustrated to find the classes

For current members, what is currently missing in what CA offers?		
	Response count	Percent of valid responses
Total responses recorded	260	
Total valid responses	209	
Total “too general”	40	19%
Summary category		
Social opportunities	17	8%
Affordability	14	7%
Missing specific classes/spaces	13	6%
User-friendly website/class interface	12	6%
Child care/kid drop-off classes	11	5%
Wider range of programing/class times between 6-8am and 7pm to late evening	11	5%
Sports leagues	10	5%
Ability to add pool, gym, single facility to membership a la carte-style	9	4%
Extended pool pours (earlier and later)	8	4%
Events/classes advertised for young adults	6	3%
Inclusion of Haven on the Lake into primary membership	5	2%
Adult-only pool/pool bar	4	2%
Updated/refreshed facilities	4	2%
Misc. (two responses or less per topic)	37	18%

Source: CA Millennials Work Group Survey, July 2018

appeared to always be full. Millennials are very interested in the studio and mind body classes offered at Haven on the Lake, often indicating that they wish Haven was included in their current membership or that those classes could also be offered at other gyms. Some of the specific classes requested include boxing studios, “younger” spin classes (SoulCycle and Zengo Cycle), a dance studio, ninja course, foreign language classes, climbing/rockwall course and the addition of outdoor classes such as paddleboard, hiking trips, and running clubs.

Respondents Who Were Previously, But Are No Longer, CA Members: Why They Left

The Work Group was particularly interested in understanding why millennials who had tried CA services and amenities may have chosen to discontinue their membership, and the survey provided an opportunity to ask directly. Cost was the primary reason given for former CA members who chose to leave. Many of the respondents to this question indicated they had moved to non-CA assessed properties and that the value for CA membership at the nonresident rate was no longer there. They decided that other gyms better served their needs.

In a direct inverse to current members who indicated they most valued the variety of services offered by CA, prior members who had left CA were those most likely to need only a narrow band of services or facilities to meet their needs. These respondents explained that they were only interested in utilizing a specific class, facility, or piece of equipment and that they felt they were paying for facilities they had no interest in using under the membership options available to them.

Reason Why Respondents Are Not CA Members

The final grouping of respondents are those who have never had a CA membership.

Why those who previously had a CA membership left		
	Response count	Percent of valid responses
Total responses recorded	153	
No reason given or too general	9	6%
Summary category		
Too expensive	72	47%
Moved away or outside of Columbia	31	20%
Did not use enough	19	12%
Did not see value in offerings	9	6%
Parents canceled plan	6	4%
Looking for different programming and/or membership structure	5	3%
Only wanted the pool	2	1%

Source: CA Millennials Work Group Survey, July 2018

What is the primary reason you are not a member?		
	Response count	Percent of valid responses
Total responses recorded	227	
Total valid responses	219	
Total "too general"	3	1%
Summary category		
Too expensive	87	40%
Do not live in Columbia	54	25%
Unaware of CA or its offerings	17	8%
Not able to take advantage of it or use facilities	13	6%
Don't think CA offers what I am looking for	10	5%
Recently moved to Columbia	10	5%
Currently use/have access to non-CA facilities	9	4%
Don't know how to become a member	6	3%
Seeking more flexibility/less commitment	3	3%
Misc. (two responses or less per topic)	7	3%

Source: CA Millennials Work Group Survey, July 2018

Several survey respondents who live in CA-assessed properties but are not CA members expressed confusion about whether they were CA members or what benefits the membership conveyed. A small number thought their annual charge payment meant they would receive automatic membership or that access to pools/gyms should be part of the yearly assessment pricing. While these kind of responses do not make up a large share of the reasons why people do or do not become CA members, there seems to be substantial confusion about the CA membership offerings versus the annual charge that may benefit from clarification in the yearly annual charge letters.

Public Meeting

A public meeting was held October 18, 2018, in the Merriweather Post Pavilion Community Room. The goal was to outline the work the group completed to date and to receive feedback on draft recommendations. The Work Group presented findings in a formal presentation and through four posters spread throughout the room. Comment cards were available throughout the room for attendees to leave suggestions for the group. The event was structured into three main sections. Attendees were first encouraged to mingle and read through the posters that outlined four main themes of recommendations that the group was developing at the time. Work group members were spread throughout the room to engage the community attendees. This was followed by a formal presentation and question/answer session. Following the presentation, attendees were encouraged to engage further on specific topics related to the four posters. At least one Work Group member was stationed next to each poster to answer questions related to that theme.

The presentation and posters shared four themes that were in development by the Work Group at the time: improved communication, community involvement, programming and classes, and socialization. The meeting was characterized by lower attendance overall and low attendance by millennials.

While survey respondents preferred Facebook and email for receiving communication, the feedback at the public meeting indicated that word-of-mouth is still a preferable means for disseminating information. It was suggested that social media has become saturated and that people trust family and friends to provide in-person recommendations (for events, restaurants, etc.). This was noted as a potential recommendation by the group and a good suggestion for improving communication to millennials.

Another attendee posed a question regarding both the first and second themes (improved communication and community involvement). Given that only a handful of attendees at the meeting could be categorized in the millennial generation, the questioner wanted to know how the meeting was publicized and if enough was done to engage the age group to be involved in the meeting. The meeting was

marketed using the same means that the survey used. Since the survey response rate was better than expected, the group was confident that the message about the meeting was getting out to people. It was then suggested by another attendee (a millennial) that the setting was an obstacle and that more public engagement would be likely at a restaurant, bar, or one of the local brewery taprooms. Further on the theme of community engagement, there were several attendees excited about the “shadow a community leader” program recommendation. Two people even offered their names as potential leaders to engage millennials and encourage community engagement.

There were several suggestions related to programming, classes and social gathering places that largely echoed the information received in the survey. Millennials are interested in casual recreation sports leagues (e.g., beer leagues) as a means of socializing with other people their own age. Food trucks were also identified as a way to bring people together as a community while not requiring large infrastructure investments. One interesting suggestion was that the village centers and CA community centers were underutilized and could provide a convenient, walkable space for millennials to gather if they had interesting food and beverage options. It was suggested that either of these could be the location of a food truck event to attract young people without requiring new businesses to open.

Despite a disappointing millennial turnout, the meeting was a success in that several impactful suggestions were provided to the Work Group. The millennials who attended the meeting were highly engaged and passionate about improving Columbia for upcoming generations. These are the types of people who should be engaged for further community participation and encouraged to bring their thoughts and ideas to CA board meetings.

Summary of Public Engagement Findings

There are several themes that emerged throughout the civic engagement and outreach process. The Work Group identified them as 1) the need for continued engagement after the Work Group completes its report, 2) the identification of new or altered CA programs and offerings, 3) improved communication with the public about existing CA programs and future events, and 4) community-wide improvements, which require support from entities such as the county government and private businesses.

Section 3

Needs and Recommendations

The needs and wants of Columbia’s millennials were identified both from the community input received during the public engagement process and the representative experiences of the Work Group’s members. In addition to capturing the specific feedback on CA’s current programming, services and facilities, the Work Group discovered prevailing issues from which eight major topics emerged. This report’s recommendations are organized around these themes:

- A.** Communication and Presentation of Information
- B.** Socializing and Gathering
- C.** Expanded and Targeted CA Programming and Facilities
- D.** Cost of Living and Housing Affordability
- E.** CA Membership Structure and Pricing
- F.** Nightlife and Amenities
- G.** Barriers to Participation
- H.** Continued CA Millennial Engagement

In this section, the Work Group summarized the issues surrounding each theme and outlined recommendations that could be explored or implemented by CA or others. In many instances, the issues identified and recommended solutions are beyond CA’s purview and ability to address. However, it may be appropriate for CA to partner with outside agencies or organizations to raise awareness about these issues and advocate for solutions.

Please note that some recommendations below are followed by the notation “(P).” This identifies the recommendations that the Work Group identifies as priorities.

A. Communication and Presentation of Information

CA faces a difficult challenge when it comes to marketing and communication. There is a huge range of ways to communicate and intended audiences — effectively communicating everything with everyone is a tall order. A lack of knowledge about existing CA offerings was a common factor among millennials. Many suggested implementing classes or programs that already exist, or reported finding out about events after they occur. Engaging programs and exciting amenities are only effective if they are successfully advertised and promoted. Millennials want to be engaged and to engage with their community. The problem is that they don’t know how.

The current CA website contains a lot of useful information but is difficult to navigate. Events need to be advertised on multiple platforms numerous times to reach the maximum number of people. Social media platforms need to be better leveraged. Facebook was an effective tool for promoting the Work Group’s survey,

but millennials who are on social media do not seek out CA materials by accessing CA profiles; they see CA communications through their own personal networks. There is a strong desire among millennials to participate in activities and utilize amenities; the challenge is communicating effectively.

Recommendations

1. Redesign and streamline CA website (P)

- a. Include language targeting millennials. There is a youth and teen center page; there should be a millennials page.
- b. Provide more efficient ways to sign up for classes via a mobile app or one-click favorites.
- c. Provide easier way to find events. The events calendar does not have all events that CA is putting on. Create a page that consolidates upcoming events.
- d. Consider creating an interactive map with facility locations and improve facility information by addressing the following issues:
 - i. The overwhelming number of facilities on the drop-down menu. There are no clear descriptions unless you navigate to the particular pages. Searching the facilities drop-down menu should be more focused on different users such as the first-time website visitor versus those who already use the facility.
 - ii. Facility hours are buried. All facility hours should be clearly organized and easy to find.
 - iii. Facilities are listed by name and there are also categories, which is confusing.
- e. Membership information and prices
 - i. To find actual membership prices takes many clicks (Membership, become a member, membership pricing, learn more). This section needs to be streamlined and clarified. It is frustrating to search for this information.
 - ii. People should be able to sign up for all memberships online.

2. Improve social media presence (P)

- a. Work to build awareness of CA's social media presence and build networks of people who will help promote events and activities on their personal networks. Many people do not know CA has a Facebook page.
- b. Encourage the use of the "share" feature to help things move through social networks.
- c. Target communications for specific age cohorts on platforms they prefer, including Instagram, Facebook, and Twitter (and email).

- d. Dedicate more resources to Facebook, including a budget for purchasing advertising.
 - e. Create specific Facebook groups/pages dedicated to a particular event or class (such as movie nights).
 - f. Create a Columbia Millennials Facebook group for millennials to connect with other millennials, and target this group with advertising for CA events/offerings relevant to millennials.
 - g. Continued promotion of events for multiple months so people do not miss them.
3. Increase on-the-ground presence
- a. Advertise upcoming events during current events and programs. Distribute fliers, promote social media pages, etc.
 - b. Advertise with signage in the community — at the Downtown Columbia Lakefront area and banners on street lights near the CA pathway system.
4. Personalized communications **(P)**
- a. Provide the opportunity for people to opt in to certain categories of promotions and advertising (millennials, family-friendly, fitness classes, etc.) so they are more likely to read what they see.
 - b. Use push notifications to remind people of upcoming events.
5. Increase non-member opportunities for learning about CA offerings
- a. Increase frequency and advertisement of open house “bring a friend for free” days or ways for non-members to check out a class/facility before participating or joining.
 - b. Have more of a CA presence in non-CA facilities and events to reach people who are unaware of current offerings.
 - c. Increase promotion of non-member events in the community. Use many platforms and partner organizations.
 - d. Use referral campaigns so members are incentivized to share offerings with their networks.
6. Consider investing in an app that offers everything in one place
- a. Signing up for classes
 - b. Event reminders
 - c. Calendar app for non-members
 - d. Facility hours and information

B Socializing and Gathering

The desire for a strong sense of community was one of the most predominant themes discovered during the Work Group’s exploration of this topic. This desire was expressed by both those millennials who grew up in Columbia and those who are recent transplants to the area. Many participants, especially those recently relocated to the area, do not have a local network of friends or a social group with which to become engaged in the community. Columbia’s millennials want places to meet others and spend more time with their existing friends group. There is a clear need for both physical spaces and programming that support opportunities to socialize.

The private sector has a role to play in filling this need by creating late-night entertainment venues that support social gathering around food and events. Other opportunities are needed that do not require financial investment, using publically available indoor and outdoor gathering areas. Free programming of smaller neighborhood gathering areas are a potential solution, expanding on the success of more centralized efforts at the Downtown Columbia Lakefront. CA should look at its facility spaces to assess how they can be enhanced to support members with a place to linger as amenity-rich hangout spots.

The need for predictable, recurrent programming was also indicated. As more respondents described their struggle to find opportunities for socializing, the Work Group found that the solution described by participants closely mirrored that of social event coordinators found on many university campuses. Frequently, higher education schools design programming and advertising campaigns that encourage the school’s campus population to attend events where the strong likelihood of finding similarly represented individuals was high. While it is more difficult to duplicate these efforts in a non-campus setting, the Work Group thinks CA should consider designing and advertising events for millennials in a more targeted fashion and hosting events like millennial meetups. These could be implemented as outdoor events or organized walks, classes, or at any number of CA’s outdoor spaces or indoor facilities, including the gyms.

Recommendations

1. Food trucks and more food trucks! **(P)**

Design food truck-centered events — establish a “First Friday” type of programming where an existing CA space can be used for casual food and music events to occur.

2. Partner with local establishments to facilitate meetups. **(P)**

Host meetup/mixer-type events at food and drink establishments where people are already meeting. This will offer people an opportunity to socialize while also notifying bystanders of the event for future opportunities.

3. Next-generation farmers markets

The Howard County Economic Development Authority should explore a number of ways to enhance Columbia's farmers markets, including:

- a. Review existing timing of markets and work to have different markets meet diverse schedules (for example, evening hours).
- b. Have a CA presence at existing markets to offer customer service/advertise.
- c. Create more of a party atmosphere by allowing music/drink vendors to participate.
- d. Expand where the farmers markets are (for example, use of Vantage Point Park or the Downtown Columbia Lakefront area as an opportunity).
- e. Expand to include local crafters/services (similar to Olney's markets).

4. CA facilities as community hangouts

- a. Design spaces within CA facilities to be more conducive for social gathering.
- b. CA facilities can provide a physical location for people to gather informally, such as an area to plug in laptops (Starbucks-ish), similar to a functional common area in higher-end apartment buildings.
- c. Village community centers and business centers are an untapped opportunity for facilitating local hangout spots. This can build on the desire for these areas to serve as unique nearby walkable destinations. CA should partner with village center owners and village associations to coordinate and activate these areas with picnics, block parties, or gatherings to promote getting together and meeting neighbors.

C. Expanded and Targeted CA Programming and Facilities

CA's focus on serving all members of the community and especially its history of being a cornerstone, family-friendly service provider has created a perception and image challenge when it comes to advertising to and engaging the millennial population. The issue of how CA visually markets itself and its programming was raised by the Work Group during its initial exploration of this topic and further echoed in feedback from the public. Imagery used in CA communications is often focused on representing children, families with children and older adults. Very little iconography shows millennial individuals. As a matter of fact, the Work Group discovered that CA did not have any images of millennials without children in its photo library.

In addition, millennials who cited a greater need for socializing opportunities raised the need for advertising to convey that other attendees their own age were likely to be present at an advertised event. It is recommended that certain events,

classes, or other programming specifically be designed and advertised to the age cohort. Essentially, CA should continue in its mission to serve a wide range of ages, but not every event or activity needs to be designed to do so.

Recommendations

1. Improve data collection

Enable a data-driven tracking of what classes, facilities or programs most appeal to millennials.

- a. Consider purchasing additional software that is better suited to tracking trends and behavior patterns for specific demographic groups that complements and/or replaces Spectrum.
- b. Exploring/gathering information from former CA members on why they discontinued membership (not liking a class instructor, music, etc.).

2. Mix socializing and fitness

Promote certain classes specifically as millennial workouts and then hangout opportunities.

3. Expand Haven on the Lake offerings to other facilities

Expand mind body classes to facilities other than Haven on the Lake and increase the number of offerings.

4. Increase class offerings **(P)**

CA should explore offering more early morning (before 6am) and night (after 7pm) class offerings at all of the CA gyms' schedules to accommodate non-traditional work hours.

5. Extend pool hours

CA should explore extending the pool hours during the busy summer months. It was noted that the time of the pool openings conflicted with nap times for individuals with young children.

6. Social sports league **(P)**

The Howard County Recreation and Parks Department currently operates a variety of sports programs and leagues; however, all of them are structured and formal. There is a desire for a more informal system, beer league, or laid-back option that could tie in with local businesses by courting a sponsor bar, grill, or other food hangout option. Currently, there are no adult leagues for the following: flag football, karaoke, cornhole, ultimate frisbee, or rugby. Potential obstacles to establishing new league options is that most fields in Howard County are owned and operated by the Howard County Recreation and Parks Department or the school system.

CA-owned parkland is limited in offerings and size.

- i. Consider partnering with Howard County Recreation and Parks to establish more informal leagues.
- ii. Advocate for the expansion of private, for-profit social sports businesses to establish operations in Howard County. DC Fray currently operates in Washington, D.C., and Volo City in Baltimore.
- iii. For leagues that require less land area (cornhole, etc.), CA could consider creating a more informal league similar to a drop-in class at a designated place, and create teams based on those who show up.

7. Adult programming

There is significant support in the community for adult-only programming and events in addition to the current programming CA provides. These events should be designed and advertised as kid-free events as opposed to family-friendly. The Work Group has identified substantial support for the following types of adult-only events:

- a. Social, late-night swim at one of the outdoor pools.
- b. Adult Paint Nights with a Columbia twist, maybe at a historic site in Columbia and/or Columbia Art Center.
- c. Events involving alcohol and food trucks.

D. Cost of Living and Housing Affordability

Although the focus of this study was on how CA and others can better serve millennials through its offerings and services, it soon became apparent that Columbia's millennial population is negatively affected by the high cost of living and lack of available affordable housing options in Howard County. While CA is not positioned to take on these issues, the Work Group felt it was important to capture the issues identified by millennials in this area and recommend that CA advocate and share these findings with outside stakeholders and Howard County's leadership. Columbia is a growing and desirable community that will continue to attract people from all over, resulting in increased demand for and rising cost of housing. Increasing the supply of housing at a wide range of prices will be essential to ensuring the community thrives.

In our research, the Work Group found many millennials are burdened with a large amount of high-interest student debt that drains their available resources. Millennials often expressed that events were too pricey and expressed a desire for more free things to do and places to hang out. CA can support the millennial population by offering a variety of programming that fits different budgets.

Recommendations

1. Explore opportunities to meet housing needs

Howard County should continue efforts to provide affordable housing and encourage development of new housing at a range of price points and housing types.

2. Increase public transportation as a cost-effective alternative to private vehicles

Howard County should invest in improving public transportation options, including:

- a. Improve bus service by increasing headways, providing real-time updates for NextBus in app form and electronic signage at bus stations.
- b. Continue to support and promote the bike-share program and investigate private-sector scooter share options.
- c. Offer a free promotion to ride the bus so people can become comfortable with the bus system.

3. Offer a range of price points for programming **(P)**

CA programming should provide a range of price points for participating in activities by:

- a. Continuing to hold free events and festivals with opportunities to both bring your own food and purchase food from vendors. Consider hosting smaller neighborhood events at more locations to reach populations with less access to public transportation.
- b. Special one-off, craft/art nights priced between \$15 and \$30 for all materials, potentially BYOB.

E. CA Membership Structure and Pricing

The Work Group was tasked with determining why millennials had lower membership rates than other age groups and to suggest how to increase their participation. Erratic work schedules that factor into millennials asking for additional class times and their preference for Supreme Sports Club's 24/7 operating schedule, also affect the type of membership structure millennials are looking for. Through the survey results, the Work Group learned that millennials have an aversion to contract-based membership structures. They expressed a preference for a high degree of membership flexibility and ability to intermittently use CA facilities.

A significant number of the millennials who engaged with the Work Group cited concern about cost and their available monthly budget as a significant factor in whether to purchase a CA membership. Many of Columbia's millennials are student debt-burdened, which affects their available discretionary spending budget. Student loan debt is not factored into CA's income-qualified membership price-reduction option.

Recommendations

1. Consider non-consecutive month-to-month memberships.

CA should evaluate how best to incorporate a month-to-month membership, which allows flexibility for the gym membership to be shut off temporarily and then restarted without the member incurring another startup fee.

2. Factor in student loan debt

Consider offering a reduced rate, similar to the income-qualified pricing, for individuals with student loan debt to allow current and future CA members a feasible option that may fit into their monthly budget.

3. A la carte-style membership

Consideration should be taken by CA to offer the ability to add a pool, gym and/or other single-type facility (i.e., Columbia SportsPark, Columbia Ice Rink, a golf club, a tennis club) to an existing membership for an extended or limited time.

F. Nightlife and Amenities

Millennials want to interact with one another through engaging nightlife activities. There is a particular interest in late-night bars/clubs that cater to younger crowds and that offer dancing and/or karaoke. According to the survey, venues or space in Columbia with dedicated nightlife would be extremely popular, especially with those between 21 and 26 years of age. Millennials expressed that current offerings are either nonexistent or targeted towards an older population. As a result, millennials are having to commute to Baltimore or D.C. to experience the nightlife that they desire.

Across all ages and lifestyles, there is a desire for more diverse and unique business offerings such as non-chain restaurants/shops/coffee shops. For older millennials, this includes establishments where kids and adults can enjoy themselves simultaneously, e.g., breweries/wineries/wine bars with playgrounds or other kid-friendly activities. Millennials want events to be held year-round, such as festivals, free public events, events with food trucks, and specific events for adults only. Networking events and young professional social scenes are popular amongst many millennials. To be a full-service community, Columbia will need to provide fun adult activities, more options for dating or nights out with friends, and more of a central hub or downtown area with live music venues.

Recommendations

1. Cultivate a nightlife culture

The private sector should coordinate to develop a central location with establishments that cater toward a nightlife scene, with nighttime bar options that are targeted towards the millennial population that include dancing and/or karaoke options.

2. Recruit/support non-chain businesses/food establishments

Local commercial land owners should focus on recruiting non-chain and unique businesses.

3. Organize predictable year-round and bimonthly events **(P)**

CA should advocate for and consider partnering with community stakeholders to offer consistent events around Columbia that are festival in nature, free, offer food trucks, offer adult-only options, and networking opportunities.

4. Utilize outdoor space

Howard County Government, CA, and community stakeholders should participate in placemaking by revamping their land holdings with lighting and amenity-rich gathering areas.

G. Barriers to Participation

A lack of information and financial stability, as discussed previously, are certainly big contributors to millennials' lack of participation in the community. However, research results showed additional barriers to participation, particularly a lack of time and feelings of intimidation.

In the survey, many expressed that they weren't able to commit the time and energy needed to participate in community events or serve in community leadership positions – activities that are ongoing and consistent. Specific reasons varied, but included things like having other work commitments, long commute hours, and job shifts outside the typical 9-5 workday.

For those interested in participating in CA classes or facility offerings, many said they were too intimidated to join classes they were interested in. The group noted apprehension around walking into a class or event due to feeling out of place. Experiences showed that millennials feel that community classes and events drew a different audience (usually significantly older or younger). This leads to situations where millennials didn't feel welcome and became a deterrent to future attendance, since they were not able to socialize or meet others in their age group. Millennials want to attend classes with other millennials, that are taught by millennials – they want to know they will share the experience with others their age. They also want more basic and intro-level classes to ease them into learning a new workout routine or type of exercise where other participants are also new.

Recommendations

1. Millennial moments classes **(P)**

Promote specific classes directly to millennials, making it a millennial meetup opportunity. This would ensure that millennials have a higher chance of seeing people their own age in the class.

2. Beginner bonding

Design an introductory class devoted only to first-time attendees (yoga for novices, intro to CrossFit/high-intensity training, etc.). Advertise these classes to millennials as a one-time introduction to a new fitness style, where instructors will slowly introduce the material and fellow classmates can be expected to also be novices.

3. Robust representation

Ensure instructors represent a diverse group of ages and genders.

H. Continued CA Millennial Engagement

The Work Group conducted multiple engagement efforts with their peers to understand how Columbia Association can better serve millennials. Some of the topics discussed (e.g., cost of living; affordable housing; transportation; and job opportunities) will benefit from increased study. This report's recommendations will also benefit from millennials' continued input as they are implemented. The Work Group noted that younger millennials (ages 17-21) should be given more opportunities to provide feedback on how to improve their community. The Work Group had a representative of this age group, but that person had to resign from the Work Group due to other commitments. Lastly, the Work Group believes that a standing advisory committee is the most effective method to solicit this feedback and work toward implementing the recommendations of this report.

Recommendation

1. Millennial ambassadors

Recruit dedicated millennials in the community to promote CA activities and plans to peers in their own social circles.

2. Expand Columbia Association Board of Directors membership

CA should establish a millennial Columbia Association board member position to serve a yearlong term. Similar positions exist on the Howard County Board of Education, Howard County Human Rights Commission, the Howard County Recreation and Parks board, and the Howard County Commission for Women.

3. Create a Millennials Advisory Committee **(P)**

CA should convert the Work Group into a standing Millennials Advisory Committee with these potential duties:

- a. Monitor the implementation of this report's recommendations.
- b. Inform and advise CA of community issues as they relate to Columbia's millennials.

- c. Assist CA in disseminating information about CA events and programming to Columbia’s millennial population.
- d. Encourage community businesses, organizations, and associations to lead in implementing recommendations that will improve Columbia’s ability to serve millennials.
- e. Organize social gathering events that:
 - i. Engage the following: new residents; Howard Hughes Corporation; management of the new Downtown Columbia apartment complexes; and renters.
 - ii. Foster a sense of community and provide predictable gathering opportunities.
- f. Recruit a broad range of age cohorts to serve on other CA and community boards.

The Millennials Advisory Committee should reach out to those millennials who expressed interest in participating in the Work Group but were not selected.

- g. Reach the younger millennials (age 17-21) and address them as a separate age cohort.

Explore unique recommendations, platforms of communication and events specific to their needs.

Chapter 4 Implementation

This section includes an implementation matrix that compiles all the recommendations and indicates who the lead agency or set of agencies should be, and to highlight those recommendations that the Work Group recommends are priorities. In all, there are 33 recommendations, with nine highlighted as priorities.

Topic	Recommendation	Lead Organization	Priority Designation
A. Communication and Presentation of Information	1) Redesign and streamline CA website	CA	Priority
	2) Improve social media presence	CA	Priority
	3) Increase on-the-ground presence	CA	
	4) Personalized communications	CA	Priority
	5) Increase non-member opportunities for learning about CA offerings	CA	
	6) Consider investing in an app that offers everything in one place	CA	
B. Socializing and Gathering	1) Food trucks and more food trucks!	CA Village associations	Priority
	2) Partner with local establishments to facilitate meetups	Millennials Advisory Committee Community stakeholders	Priority
	3) Next-generation farmers markets	Howard County Economic Development Authority	
	4) CA facilities as community hangouts	CA	

C. Expanded and Targeted CA Programming and Facilities	1) Improve data collection	CA	
	2) Mix socializing and fitness	CA	
	3) Expand Haven on the Lake offerings to other facilities	CA	
	4) Increase class offerings	CA	Priority
	5) Extend pool hours	CA	
	6) Social sports league	CA Howard County Parks and Recreation Private businesses	Priority
	7) Adult programming	CA	
D. Cost of Living and Housing Affordability	1) Explore opportunities to meet housing needs	Howard County Government Private development	
	2) Increase public transportation as a cost-effective alternative to vehicles	Howard County Government Maryland Department of Transportation	
	3) Offer a range of price points for programming	CA	Priority
E. CA Membership Structure and Pricing	1) Consider non-consecutive month-to-month memberships	CA	
	2) Factor in student loan debt	CA	
	3) A la carte-style membership	CA	

F. Nightlife and Amenities	1) Cultivate a nightlife culture	Private businesses/ developers Howard County Government	
	2) Recruit/support non-chain businesses/ food establishments	Private businesses/ developers	
	3) Organize predictable year-round and bimonthly events	Private businesses/ developers CA Village associations	Priority
	4) Utilize outdoor space	Private businesses/ developers CA Village associations	
G. Barriers to Participation	1) Millennial moments classes	CA	Priority
	2) Beginner bonding	CA	
	3) Robust representation	CA	
H. Continued CA Millennial Engagement	1) Millennial ambassadors	CA	
	2) Expand Columbia Association Board of Directors membership	CA	
	3) Create a Millennials Advisory Committee	CA	Priority

Endnotes

- 1. “Millennials expected to outnumber Boomers in 2019” —**
Pew Research center. <http://www.pewresearch.org/fact-tank/2018/03/01/millennials-overtake-baby-boomers/>
- 2. Howard County Demographic Overview —** Prepared by Howard County Department of Planning and Zoning, Research Division (2018)
“Census, Demographics and Economy” — Howard County Government. <https://www.howardcountymd.gov/Departments/Planning-and-Zoning/Statistics-and-Reports/Census-Demographics-and-Economy>. Accessed November 15, 2018.
- 3. Research Report, Issues 19 and 26, January 2012, July 2017, Howard County Department of Planning and Zoning, Division of Research**
- 4. “Millennial Migration: How has the Great Recession affected the migration of a cohort as it came of age?” —**
Census Bureau. https://www.census.gov/content/dam/Census/library/working-papers/2014/demo/MillennialMigration_Benetsky-Fields.pdf. Accessed November 15, 2018.
- 5. “The millennial generation” —** Brookings Institution.
https://www.brookings.edu/wp-content/uploads/2018/01/2018-jan_brookings-metro_millennials-a-demographic-bridge-to-americas-diverse-future.pdf. Accessed November 15, 2018.
- 6. “Millennial growth and “footprints” are greatest in the South and West.” —** 6 Mar. 2018. <https://www.brookings.edu/blog/the-avenue/2018/03/06/millennial-growth-and-footprints-are-greatest-in-the-south-and-west/>. Accessed November 19, 2018.
- 7. “Fast Facts” —** U.S. Department of Education. <https://nces.ed.gov/fastfacts/display.asp?id=76>. Accessed November 20, 2018.
- 8. “The millennial home buying effect” —** Washington Post.
<http://www.washingtonpost.com/sf/brand-connect/nar/the-millennial-home-buying-effect/>. Accessed December 17, 2018.
- 9. “2018 Real Estate Trends: How Millennials are Shaping the Home” —** 31 Jan. 2018. <https://www.joinparks.com/blog/2018/1/31/2018-real-estate-trends-how-millennials-are-shaping-the-home-buying-process>. Accessed December 17, 2018.

