

DEMOGRAPHIC ANALYSIS & RECREATION AND LEISURE TRENDS REPORT

Board of Park Commissioners
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Division of Strategic Initiatives
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WHAT IS A DEMOGRAPHIC ANALYSIS & RECREATION AND LEISURE TRENDS REPORT?

- Demographics provide a snapshot of changes in the population within the taxing district
 - Report looks at population, housing & socioeconomic measures like gender, age, race/ethnicity, households, access to a personal vehicle, income, etc.
- Recreation & Leisure Trends provide detail on user preferences & participation in activities at various levels
 - Organizations used focus groups, surveys & spending data

WHY DO WE LOOK AT THIS INFORMATION?

- Helps us understand our audience & how to best serve them to deliver on our mission
- Commission for Accreditation of Park and Recreation Agencies (CAPRA) requirement
- Helps operationalize Cleveland Metroparks 2020: The Emerald Necklace Centennial Plan

RELATIONSHIP TO 2020 STRATEGIC PLAN

Affects all Key Directions, but most directly:

- Scale
 - Look outward & coordinate our actions strategically with communities
 - Cleveland Metroparks strives to serve & benefit all within Cuyahoga County & Hinckley Township in Medina County
- Cleveland and Inner Ring Suburbs
 - Improve access to facilities & recreational and outdoor education opportunities
 - Improve quality of life
 - Extend economic benefits of access to greenspace & greenways to more of the county

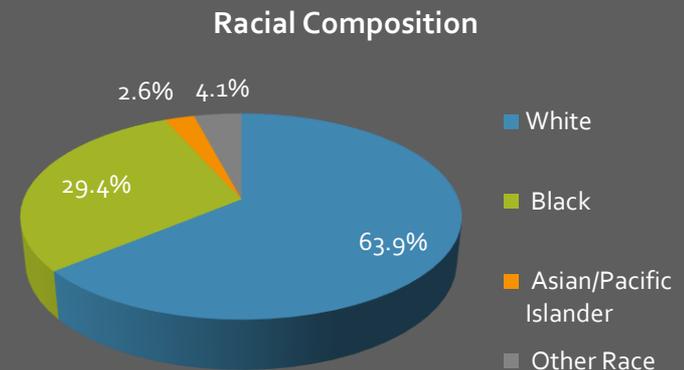
RELATIONSHIP TO 2020 STRATEGIC PLAN

- Outdoor Recreation
 - Understand changing needs & desires for the population we have now & will have in the next 10+ years
 - Improve health for all within the Park District boundary
- Regional Greenway System
 - Protect & preserve vital natural assets
 - Build a coordinated alternative transportation network
 - Positive effects on stormwater & air quality

DEMOGRAPHIC FINDINGS

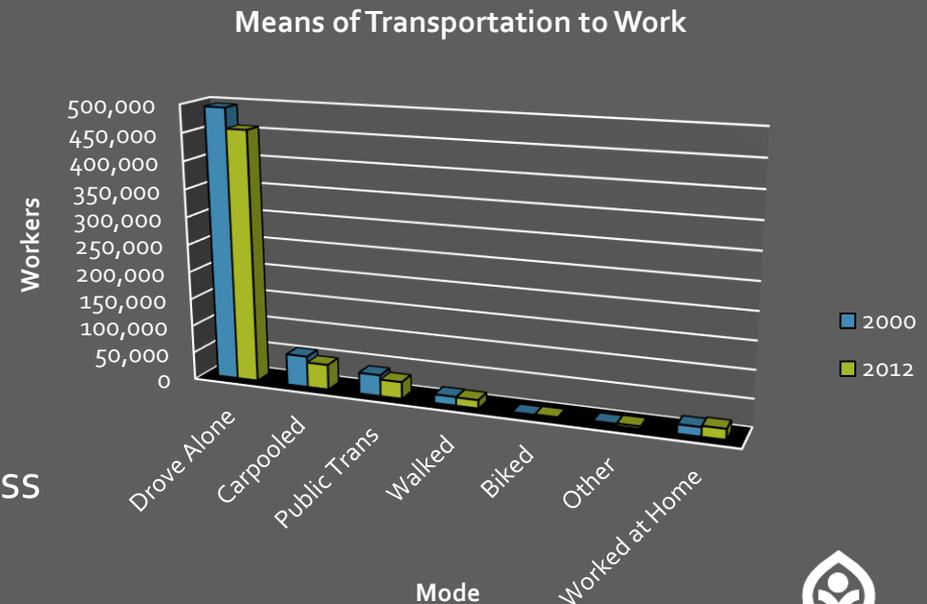
Within the taxing district, the population is:

- Shrinking
 - 1,292,001 (2010) vs. 1,404,754 (2000), an 8.0% drop
- Becoming more diverse
 - 63.9% white (67.6% in 2000)
 - 29.4% black or African American (27.2% in 2000)
 - 4.1% another race or two or more races (3.3% in 2000)
 - 2.6% Asian or Pacific Islander (1.8% in 2000)
 - 4.8% identify ethnically as Hispanic (3.4% in 2000)
- Aging
 - Median age is 40.2 (2010) vs. 37.3 (2000)
 - 77.3% of population is 18+; 15.5% is 65+



DEMOGRAPHIC FINDINGS

- Households & income
 - Average household size is 2.34 (2.39 in 2000)
 - Household income lost ground compared to state & US; 16.1% live below the poverty line, a 25.9% increase over the rate in 2000
- Commuting
 - 79.7% drive alone to work
 - 8.0% carpool
 - 9.0% use public transportation, walk, bike, use another mode
 - 3.3% work at home
- Access to a personal vehicle
 - 13.1% of households have no access
 - 24.9% within City of Cleveland



RECREATION & LEISURE TREND FINDINGS

- Most important recreational opportunities
 - Multi-use trails for hiking, biking & walking
 - Camping areas
 - Nature based recreation
- Trends & opportunities
 - Nature play areas
 - Multi-generational use
 - Cost-efficient activities
 - Water-based recreation
- Pressing needs
 - Better trail connectivity
 - More multi-use trails

RECREATION & LEISURE TREND FINDINGS

- Spending time with family & friends and getting exercise identified often as motivators for outdoor recreation
- Total outdoor recreation participation drops off considerably for those 45+ (38.0%) vs. younger adults (57.0%)
- Spending on entertainment & recreation accounts for about 4.9% of the typical household budget for the area

HOW WE USE THIS INFORMATION

- Reservation & facility planning
 - Understand where changes in population shifts are occurring to match to audience
 - Identify areas of opportunity for land acquisition
- Regional Greenway System
 - Identify areas of limited access
 - Improve options for those who are transit dependent, walk, or bike

HOW WE USE THIS INFORMATION

- Input for outdoor education & recreation programs
 - Maintain traditional outdoor activities like running, fishing, biking, and hiking where there is demonstrated interest & participation
 - Interest in new outdoor activities like stand-up paddling & triathlons
 - High demand for nature programs for all ages

WHAT ELSE DO WE LOOK AT?

- Cleveland Metroparks user & non-user surveys
- Community level plans/studies
- Academic research, local & national
- Regional plans/studies
 - Vibrant NEO 2040
 - Long-Range Transportation Plan

CUYAHOGA COUNTY TAX BASE ANALYSIS

Based on research at Cleveland State University:

- Cuyahoga County lost \$4 billion (5.1%) market value for all property classes from 1994-2013
 - Only commercial gained slightly in value at the county level while residential and industrial lost
 - Adjacent areas gained \$35 billion (45.7%)
- Loss of real estate tax base is most pronounced in City of Cleveland & inner ring suburbs, but impacts entire county
 - e.g., Lakewood, Brooklyn, Cuyahoga Heights, Maple Heights, Cleveland Heights, East Cleveland, etc.

CUYAHOGA COUNTY TAX BASE ANALYSIS

- Real growth/loss in assessed residential real estate values tightly tied to new construction & Cuyahoga County is nearly built-out
 - Existing housing stock in Cuyahoga County is aging
- Rebuilding within the core city & inner ring suburbs is key to reversing course for Cuyahoga County
 - \$600 million in new residential construction needed to maintain tax base

VIBRANT NEO 2040

- 12-County framework for decision making
- Utilized scenario planning & fiscal impact modeling

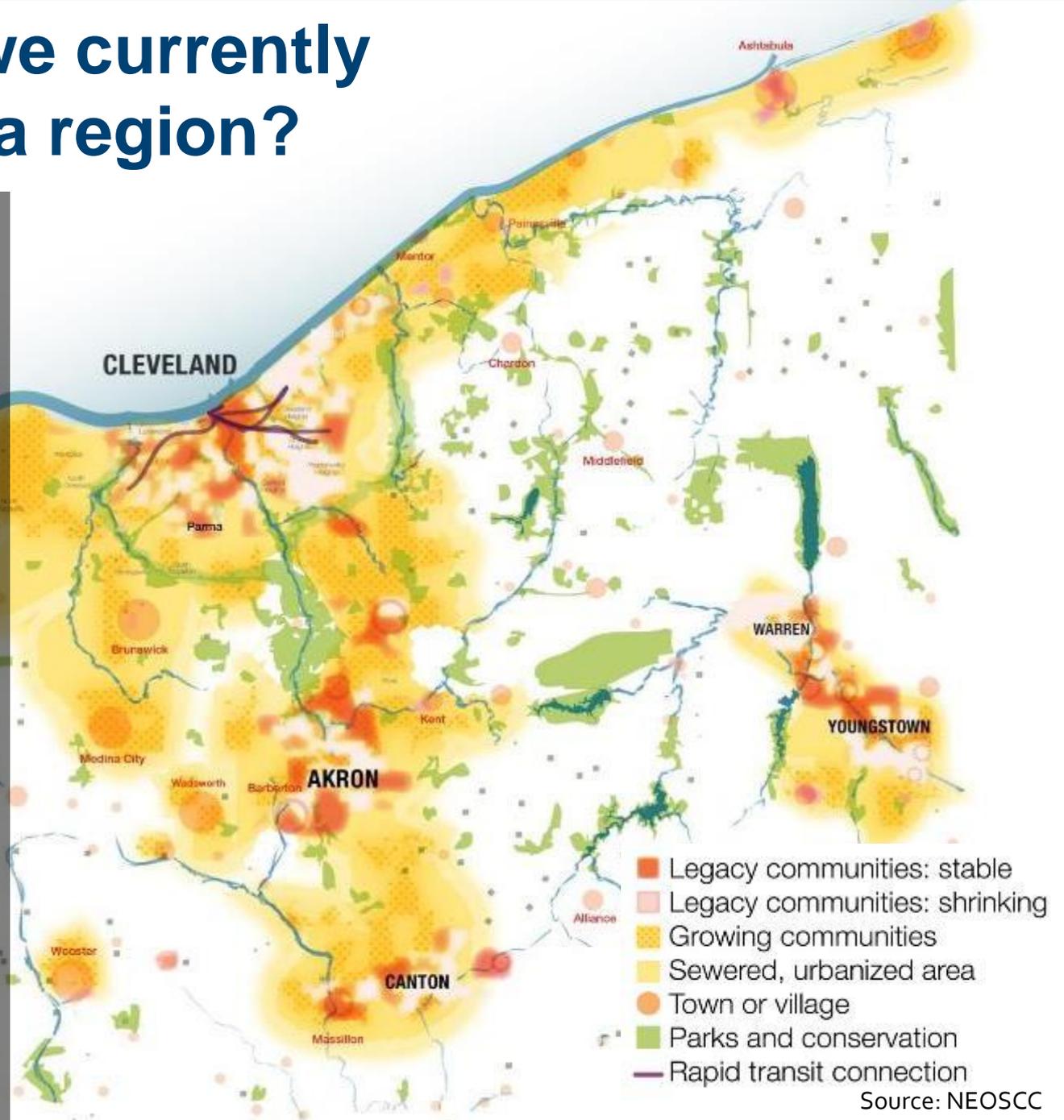
4 Scenarios

- “Trend” & “Do Things Differently”
 - Assume continued population churn in region
- “Grow the Same” & “Grow Differently”
 - Assume “fair share” regional population & job growth

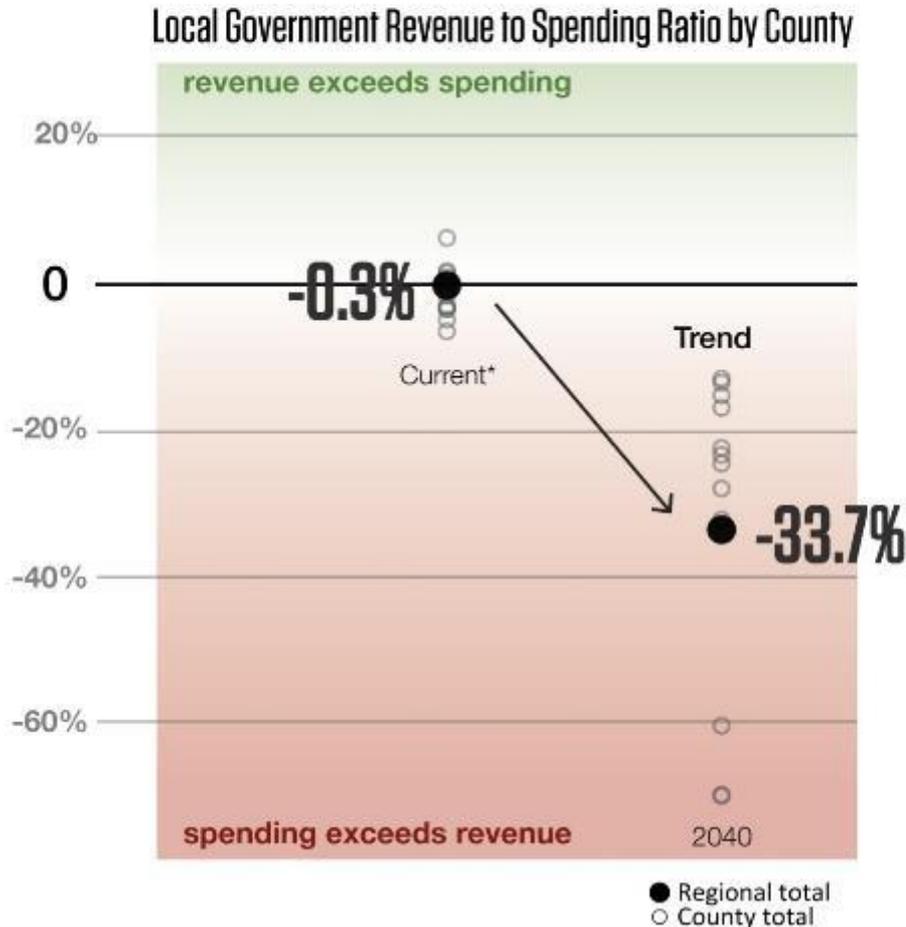


Where are we currently heading as a region?

- Continued development at the edges of our metro areas on land that requires new infrastructure and public services.
- Abandonment of existing communities that already have infrastructure and public services.
- Increasing distance between people and their jobs.
- Limited transportation options other than our personal vehicles.
- Increased fiscal stress on both households and local governments.



Current trends will result in declining fiscal health across the region



Financial Outcomes

- Negative fiscal impact across the region
- All counties experience declining revenues compared with costs
- The most fiscally strong county in 2040 is weaker than the weakest county today

What is driving these changes?

- High Cost of New Infrastructure
- High Rates of Abandonment
- Stagnant employment

VIBRANT NEO 2040 RECOMMENDATIONS

▪ **Strengthen Established Communities**

- Focus new residential and commercial development on sites within established communities
- Develop a robust network of regional job centers connected by multimodal transportation corridors within and between counties
- Pursue the remediation, assembly, marketing, and redevelopment of abandoned properties at both the local and regional levels
- Encourage a higher frequency of mixed-use development and a range of diverse, affordable housing options

▪ **Increase Transportation Choice**

- Enhance and coordinate the region's rail and bus services
- Enhance walking and cycling as transportation options to increase regional mobility and improve public health

▪ **Preserve and protect natural resources**

- Preserve our natural areas for future generations, provide outdoor recreation opportunities, and develop a regional approach to protecting air, water, and soil quality
- Support sustainable agriculture and the local food system in Northeast Ohio

▪ **Promote Collaboration and Efficiency**

- Increase the collaboration among the region's government agencies to expand information sharing and find more cost-effective means to provide essential services

OUR ROLE WITHIN CUYAHOGA COUNTY

- Continue to deliver on Cleveland Metroparks mission
- Improve access to Park District facilities & programs
- Work with other partner organizations to improve quality of life & prosperity of Cuyahoga County and Hinckley Township

QUESTIONS?

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