

2014 Demographic Analysis & Recreation and Leisure Trends Report

Cleveland Metroparks Technical Report



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Division of Strategic Initiatives
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EXECUTIVE SUMMARY

Cleveland Metroparks exists to conserve significant natural resources and enhance people's lives by providing safe, high-quality outdoor education, recreational, and zoological opportunities. To continue these standards, Cleveland Metroparks must stay up to date with recreation and leisure trends, and underlying demographics, for the citizens of Cuyahoga County and Hinckley Township in Medina County. This knowledge will enable Cleveland Metroparks to continue to provide desired recreation, outdoor experiences, and educational programs for the community, while also using this information for conservation efforts.

Cleveland Metroparks 2020: The Emerald Necklace Centennial Plan (2020 Plan) was created in 2012 to serve as the strategic framework to guide facility planning and programming for the Park District over a 10-year period and beyond. Regular operational assessments, community input and engagement, and analyses like this trends report are used along with the 2020 Plan to constantly evaluate the Park District's performance and to guide its work. This data relates to the following key directions from the plan, which serve as guideposts to align programs and services:

1. **Green Infrastructure:** Cleveland Metroparks uses demographic data and public input on sustainability to identify areas of opportunity for delivering services and conserving natural resources in ways that lessen stormwater impacts, improve the health of waterways and the environment, and provide recreational opportunities.
2. **Scale:** Data within this report and other analyses are used to understand opportunities to expand Cleveland Metroparks Reservation boundaries where needed, and to illustrate where partnering with community organizations could connect various parks and greenways to expand outdoor recreation and education opportunities for all.
3. **Cleveland and Inner Ring Suburbs:** Data is used to identify access to and availability of desired outdoor educational and recreational programs for all residents as the Park District looks to better connect residents inside the "Emerald Necklace."
4. **Outdoor Recreation:** The demographic and trends data collected helps Cleveland Metroparks understand and plan for future outdoor recreation opportunities for a changing population while staying consistent with the organization vision and mission.
5. **Regional Greenway System:** Leisure trends data and other park surveys reinforce the need to complete the "Emerald Necklace" by partnering with communities to further develop the Cleveland Metroparks trails and open space and to work with others throughout the Greater Cleveland area to build out the regional alternative transportation and open space networks.
6. **Lakefront:** Detail on leisure trends related to water sports specifically and demographics on areas not previously adjacent to Cleveland Metroparks is being used in master planning efforts for the 511 acres of lakefront property acquired by the Park District in 2013.
7. **Financial Sustainability:** Demographic and trends data helps with financial planning for a wide range of users and activities so that Cleveland Metroparks continues its long history of fiscal responsibility.

The 2020 Plan translates the key directions into an Action Plan, with seven core action areas and associated goals and tasks. The 2020 Action Areas – 2014 Update below correlates the demographics and trends analysis findings with the action areas and goals developed as part of *Cleveland Metroparks 2020: The Emerald Necklace Centennial Plan*. The remainder of the report is organized to provide:

- Demographics
 - An overview of demographics in the taxing district
 - More detailed analysis of population, gender, age segmentation, and race/ethnicity of constituents in the taxing district and how general recreation and leisure trends are related
- Recreation & Leisure Trends
 - Overall recreation and leisure trends
 - Trends in Ohio, a summary of the *2013 Ohio Statewide Comprehensive Outdoor Recreation Plan* (SCORP) findings, specifically from its Northeast Ohio focus group

2020 Action Items – 2014 Update

The 2020 Plan includes Action Items that are reviewed and measured on an annual basis. Correlating the findings of updated demographic and recreational trends with the Action Items helps the 2020 Plan reflect current conditions and market demands. Balancing these changing elements with the constant of the organization’s vision, mission, and guiding principles assures an organization that is timely and responsive without deviating from the core values demonstrated by Cleveland Metroparks since 1917.

The 2020 Action Items are highlighted below, along with the overall goal and potential impacts of this analysis. The full Action Item tables offer a more comprehensive update; however, this summary shows the direct relation of the current findings to the 2020 Plan.

Program Services

Goal: Enhance the impact of program services offered by Cleveland Metroparks by fulfilling the integrated education, conservation, and recreation mission and reaching a wider audience that is reflective of the entire service area.

Recommendations Based on Demographic and Trends Analysis:

- Maintain traditional outdoor activities to match interest in running, fishing, biking, and hiking. Consider expanding camping programs where appropriate.
- Continue to offer new outdoor activities and appropriate recreation events to keep pace with interest in stand-up paddling, boardsailing, triathlons, and adventure racing.
- Continue to work towards the cost recovery goal for program services, recognizing that whereas household income increased on the whole in the period from 2000 to 2010, there is also an increasing number of residents living below the poverty line.
- Programming should reflect the increased diversity of the constituent base.
- The SCORP report indicates high demand for nature programs for all ages, with respondents ranking the category fourth out of 21 possible options.

Facilities

Goal: Manage facilities to uphold Cleveland Metroparks high standard for providing well-maintained facilities.

Recommendations Based on Demographic and Trends Analysis:

- The SCORP portion of the report highlights the desire for trails and connectivity, as well as trailhead facilities such as restrooms and drinking fountains. Continue to expand these types of facilities.
- Maintenance continues to be a priority for users, and is reflected in Cleveland Metroparks staffing and budgeting commitment.

Natural Resources

Goal: Use and advocate for an ecosystem approach to natural resource management as part of a regional green infrastructure strategy.

Recommendations Based on Demographic and Trends Analysis:

- Wildlife viewing, fishing, and bird watching continue to draw many participants. Resource management efforts to improve and expand habitat can be related to this base of active users, and can be correlated to economic impact.

Greenway and Trail Networks

Goal: Provide environmental, economic, and community benefits for the people of Northeast Ohio through an accessible, regional greenway and trail network structured around the “Emerald Necklace” and other greenway corridors.

Recommendations Based on Demographic and Trends Analysis:

- In addition to land-based trails, water trails are identified as a priority by the National Park Service and Ohio Parks and Recreation Association, and are popular with Northeast Ohioans. Cleveland Metroparks can partner to designate routes and facilitate their use.
- Continued acquisition efforts to expand connectivity, especially as related to trails, green infrastructure, and open space.

Park Expansion

Goal: Play a foundational role in transforming the Cleveland waterfront to an icon of urban vitality, urban ecology, and active outdoor lifestyles.

Recommendations Based on Demographic and Trends Analysis:

- Note: Acquisition of the Lakefront Reservation and the lakefront portion of Euclid Creek Reservation has allowed Metroparks to make significant progress towards this goal.
- Note: The lakefront acquisition allows the Park District to connect with new demographics in the core of the service area.

Marketing

Goal: Increase the awareness and appreciation of Cleveland Metroparks at the local, regional, and national levels through effective marketing and informational campaigns.

Recommendations Based on Demographic and Trends Analysis:

- Marketing efforts can utilize the overall demographic information as well as specific analysis for each reservation when developing campaigns and interpretive materials, including areas with potential language barriers.

Reservation Planning

Goal: Develop and implement reservation plans that incorporate the physical, programmatic, and business strategies of the Strategic Plan.

Recommendations Based on Demographic and Trends Analysis:

- Consider including and expanding nature play offerings, additional children’s summer camp programs, multi-generational opportunities, adventure recreation, affordable and informal recreation such as disc golf and kick ball, and water-based recreation including paddlesports.
- Pressing needs identified in the SCORP analysis, in conjunction with ongoing Cleveland Metroparks user surveys, can help inform the facilities desired by park users. Trails and trail connectivity rank highly in this analysis.

Conclusion

Cleveland Metroparks will continue to strive to realize the vision of the 2020 Plan. As illustrated in the findings above, the organization is committed to serving the constituent base while adhering to our core values.

“Cleveland Metroparks will conserve significant natural resources and enhance people’s lives by integrating high-quality outdoor education, recreation, and zoological opportunities into people’s lives.”

Mission Statement,
*Cleveland Metroparks 2020:
The Emerald Necklace
Centennial Plan*

DEMOGRAPHICS

The demographic analysis encompasses the district boundary of Cleveland Metroparks, which is the taxation district comprising all of Cuyahoga County and Hinckley Township in Medina County. Cleveland Metroparks also has additional parkland in Willoughby Hills in Lake County, Northfield Center, Richfield and Sagamore Hills Township in Summit County, North Ridgeville in Lorain County, and Bainbridge Township in Geauga County that is not represented. This analysis includes the overall size of the population, separating it into gender, age segments, race and ethnicity, and disability status. Economic status of the residents in the community, which includes disposable income characteristics, household income statistics, and household expenditures, along with commuting characteristics and access to a vehicle, are also presented. This demographic analysis provides an understanding of the dimensions and dynamics of the population served by Cleveland Metroparks. It also includes estimates and projections for the future so that the Park District may plan accordingly for changing needs.

Methodology

Demographic data used for this report was obtained primarily from the United States Census Bureau and the Northeast Ohio Community and Neighborhood Data for Organizing (NEO CANDO), a free and publicly accessible social and economic data system of the Center on Urban Poverty and Community Development, a research institute housed at Case Western Reserve University's Mandel School of Applied Social Sciences. NEO CANDO is a local reference source for data sourced from the Census Bureau. Population projections are from data published in 2013 by the Ohio Development Services Agency, and household projections are from the Northeast Ohio Sustainable Communities Consortium.

Leisure trend data was acquired through the Outdoor Foundation, a not-for-profit entity established by the Outdoor Industry Association, and the Ohio Department of Natural Resources, which publishes the SCORP. All data related to outdoor activity trends and participation rates are for the United States as a whole, not for the Park District. Under trends in Ohio, all data for outdoor recreation trends was obtained from the SCORP. Other additional information used was obtained from the previous *Demographic and Leisure Trends Analysis*, produced by PROS Consulting for Cleveland Metroparks.

Demographic Overview

Cleveland Metroparks currently has 22,852 acres of parkland in a total of 40 municipalities, 19 villages and 7 townships in 6 counties, providing over 100 miles of connecting parkways as well as Cleveland Metroparks Zoo. Since the last demographic and trends analysis, completed in late 2012, Cleveland Metroparks gained almost 2,000 acres of parkland in two municipalities, three townships in four different counties, and is still continuing to grow. However, even though Cleveland Metroparks continues to expand, the population within the taxing district continues a long trend of contraction.

Total Population

- From 2000 to 2010, total population fell by 8.0% from a reported 1,404,754 persons to the current population estimate of 1,292,001 million persons, an annual decrease of 0.8%;¹
- Outmigration from Cuyahoga County into adjacent counties in Northeast Ohio and other areas is projected to continue into the next decade, with a total population estimate of 1,242,380 million persons in 2015 and 1,209,550 in 2020; and
- From 2010 to 2020, the rate of population contraction is projected to be less than during the prior decade, shrinking by 4.8%, or an annual decrease of 0.5%.²

Gender

- The population is 47.5% male and 52.5% female; and
- In terms of total population, females declined at a slightly faster rate of 8.4% compared to males, who declined 7.6% from 2000 to 2010.³

Age Segments

- Median age is 40.2;
- From 2000 to 2010, the percentage of the population ages 18+ increased from 75.0⁴ to 77.3; and
- In 2010, those ages 65+ and 85+ made up 15.5% and 2.6% of the population, respectively.⁵

Race & Ethnicity

- The population served by Cleveland Metroparks has become more diverse;
- Persons identifying as white comprised the largest segment of the population in 2010 at 825,587, or 63.9%; total white population decreased from 2000, when it was 949,471 and 67.6%;
- The second largest racial group are those who identify as black or African American at 380,247, or 29.4%, compared to 382,643, or 27.2% in 2000;
- From 2000 to 2010, the number of people who classify themselves as Asian/Pacific Islander increased from 25,656 (1.8%) to 33,298 (2.6%);
- From 2000 to 2010, the number of people who classify themselves as another race or two or more races increased from 46,984 (3.3%) to 52,749 (4.1%); and
- The number of people who classify themselves ethnically as Hispanic/Latino, went from 47,162 (3.4%) in 2000 to 61,394 (4.8%) in 2010.⁶

¹ Includes the entire taxing district of Cuyahoga County and Hinckley Township in Medina County.

² Population projection data is for Cuyahoga County only due to granularity of data available. Population projections by place are expected to be completed by the Northeast Ohio Area-wide Coordinating Agency in early 2015.

³ "NEO CANDO 2010+ System," Northeast Ohio Data Collaborative, accessed July 24, 2014, <http://neocando.case.edu/neocando/>.

⁴ US Census Bureau/American FactFinder2, "DP-1: Profile of General Demographic Characteristics: 2000," Census 2000, US Census Bureau, accessed September 14, 2014, <http://factfinder2.census.gov>.

⁵ US Census Bureau/American FactFinder2, "DP-1: Profile of General Population and Housing Characteristics 2010," Census 2010, US Census Bureau, accessed September 14, 2014, <http://factfinder2.census.gov>.

⁶ "NEO CANDO 2010+ System."

Disability Status

- There are 179,606 persons with a disability, or 14.1% of the total population, which is similar to the state level (13.2%), but higher than the national level (12.0%); and
- For the population under 18 years old, 5.2% have a disability, 11.8% of those 18-64 years old have a disability, and when looking at those 65+, the rate is 37.1%.⁷

Households & Income

- There are 537,603 occupied households in the taxing district with an average household size of 2.34 persons;⁸
- The taxing district's median household income was \$42,255 in 2000 and \$48,033 in 2010, a 13.7% increase without adjusting for inflation, while state median household income was \$40,998 in 2000 and \$48,246 in 2010 (17.7% increase) and nationally it was \$42,164 in 2000 and \$53,046 in 2010 (25.8% increase);
- Though household income increased from 2000 to 2010, the rate of increase lagged behind both state and national figures and did not keep pace with inflation; and
- From 2000 to 2010, there was a 25.9% increase in the number of persons living below the poverty line, with a total of 208,036, or 16.1%, in 2010.⁹

Commuting Characteristics & Access to a Personal Vehicle

- There are 571,998 persons in the labor force and the majority, 79.7%, drive alone to work, followed by carpooling at 8.0%, public transportation, walking, biking, other methods of transportation make up 9.0%, and those who worked at home combined make up 3.3%;¹⁰
- The number of persons who bike to work has increased from 1,122 (0.2%) in 2000¹¹ to 1,975 (0.4%);¹² and
- Within the taxing district, 13.1% of households do not have access to a personal vehicle, and within the City of Cleveland, it is 24.9%.¹³

⁷ US Census Bureau/American FactFinder2, "DP02: Selected Social Characteristics in the United States," 2008-2012 ACS, US Census Bureau ACS Office, accessed September 11, 2014, <http://factfinder2.census.gov>.

⁸ US Census Bureau/American FactFinder2, "S1101: Households and Families," 2008-2012 ACS, US Census Bureau ACS Office, accessed July 23, 2014, <http://factfinder2.census.gov>.

⁹ "NEO CANDO 2010+ System."

¹⁰ US Census Bureau/American FactFinder2, "B08006: Means of Transportation," 2008-2012 ACS, US Census Bureau ACS Office, accessed July 25, 2014, <http://factfinder2.census.gov>.

¹¹ US Census Bureau/American FactFinder2, "QT-P23: Journey to Work: 2000," 2000 Census SF3, US Census Bureau, accessed July 25, 2014, <http://factfinder2.census.gov>.

¹² US Census Bureau/American FactFinder2, "B08006: Means of Transportation."

¹³ Ibid.

Demographic Detail

Total Population

Cleveland Metroparks total service population has been shrinking over the past two decades, declining at an average annual rate of -0.1% from 1990 to 2000, and then more rapidly at -0.8% annually from 2000 to 2010. This trend is expected to continue at a more moderated annual rate of -0.5% from 2010 to 2020, according to projections from the Ohio Development Services Agency.¹⁴ This downward trend is depicted in Figure 1. Municipal level

projections are not yet available; therefore, the 2020 projection for total population is for just Cuyahoga County and does not include Hinckley Township in Medina County. However, Cuyahoga County accounts for 99.4% of the taxing district so these projections are still relevant for planning purposes.

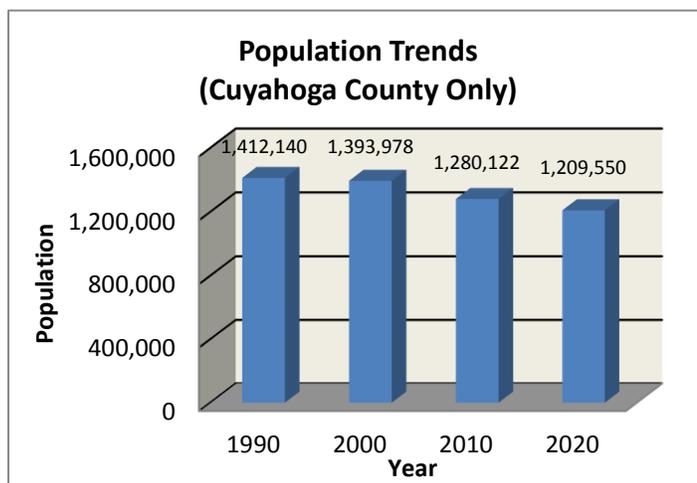


Figure 1. Population Trends

Overall US Recreation Trends

Over the past few years, total outdoor outings, number of participants, and the participation rate in recreational activities have grown in America. According to the Outdoor Foundation's *2013 Outdoor Participation Report*, from 2006 to 2012, the number of total outings increased from 11.6 billion to 12.4 billion, the number of participants increased from 134.4 million to 141.9 million, and the participation rate increased from 49.1% to 49.4%. Although the participation rate only increased by 0.3%, there was an increase of 7.5 million participants, which means that more and more Americans are getting involved. The participation rate for the East North Central region (Wisconsin, Illinois, Indiana, Michigan, and Ohio) of the United States is 50.0%. This region accounts for 17.0% of total US population, and is about in the middle of the nine other regions across the country in terms of participation – West North Central is the highest at 57.0% and West South Central is the lowest at 45%.¹⁵

Additionally, the most popular national outdoor activities reported from a survey of Americans ages 6+ were:

- 19% - Running, jogging and trail running;
- 16% - Freshwater, saltwater and fly fishing;
- 15% - Road, mountain and BMX biking;
- 13% - Car, backyard and RV camping; and
- 12% - Hiking.¹⁶

¹⁴ *Ohio County Indicators Report* (Columbus: Ohio Development Services Agency, July 2013), 23.

¹⁵ The Outdoor Foundation, *2013 Outdoor Participation Report*, accessed August 5, 2014, outdoorindustry.org/images/researchfiles/ParticipationStudy2013.pdf?193, 8.

¹⁶ The Outdoor Foundation, *2013 Outdoor Participation Report*, 17.

The survey also recorded outdoor activities by frequency of participation in terms of number of annual outings:

- 87 - Running, jogging and trail running;
- 64 - Road, mountain and BMX biking;
- 46 - Bird watching and wildlife viewing;
- 22 - Freshwater, saltwater and fly fishing; and
- 18 - Hiking.¹⁷

Trends covering team sports, though not a primary focus of Cleveland Metroparks recreation mission, are also helpful to understand overall recreational demand. The following are the team sports with the highest participation rates:

- 8.4% - Basketball;
- 6.8% - Tackle, flag, and touch football;
- 6.1% - Indoor and outdoor soccer;
- 5.7% - Beach, grass and court volleyball; and
- 4.7% - Baseball.¹⁸

Other activities that are popular among Americans in terms of participation rates are:

- 40.6% - Walking for fitness;
- 15.8% - Bowling;
- 12.2% - Billiards/pool
- 7.8% - Golf; and
- 5.9% - Tennis.¹⁹

Trends data about outdoor recreation and team sports are helpful to keep abreast of activities that are gaining in popularity and that have high numbers of outings to inform programming and facility planning and design for the Park District.

Gender

The gender distribution for constituents in the taxing district is skewed slightly with females making up 52.5% of the population and males 47.5%.²⁰ In 2012, participation in at least one outdoor activity per year by gender was:

- 45.0% for females; and
- 55.0% for males.²¹

¹⁷ Ibid.

¹⁸ Ibid., 59-60.

¹⁹ Ibid.

²⁰ "NEO CANDO 2010+."

²¹ The Outdoor Foundation, *2013 Outdoor Participation Report*, 11.

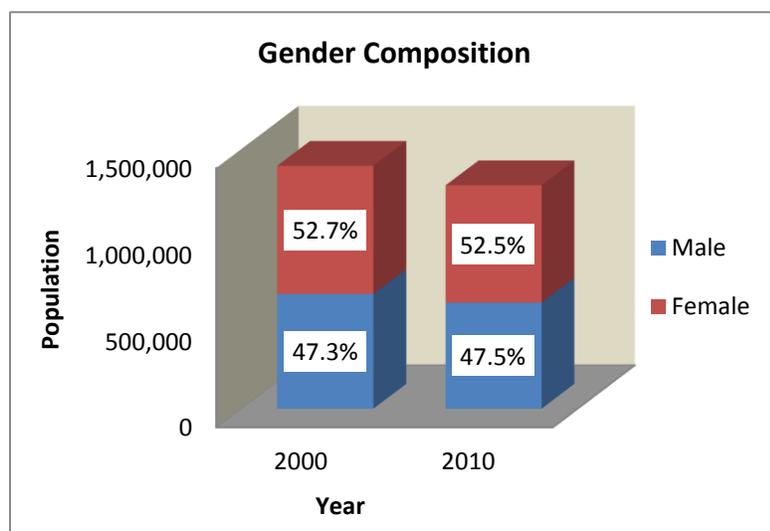


Figure 2. Gender Composition

When breaking down participation rates by gender, most age segments show higher male participation rates, except for ages 18-24. While men participate more often in outdoor activities in four of the five age segments, there is a noticeable difference in the middle age segment of 18-24 with females participating 12.0% more than males as depicted in Table 1. With more women not only comprising a larger portion of the general population during the mature stages of the lifecycle, but also participating in recreational

activities further into adulthood, a relatively new market has appeared over the last few years.²²

Table 1. 2013 Outdoor Participation Report: Participation in Outdoor Activity by Gender

Age Segment	Number of Participants	Male	Female
Ages 6 – 12	18.3 Million	53.0%	47.0%
Ages 13 – 17	12.8 Million	59.0%	41.0%
Ages 18 – 24	17.3 Million	44.0%	56.0%
Ages 25 – 44	46.5 Million	55.0%	45.0%
Ages 45+	47.0 Million	59.0%	41.0%

Overall, females are opting less for team oriented activities. Participation in team activities peaks for female youth, but declines rapidly for the 18-24 age segment. Along with team oriented sports, outdoor activities dominate the 6-12 age segment, declining slowly into the 20s. This is where indoor fitness activities surpass outdoor activities, heavily increasing from ages 6-12 until the mid-20s, then remaining above team oriented sports and outdoor activities for the older age segments.²³

Males differ from females with outdoor activities remaining above indoor fitness activities and team oriented sports for all age segments. Team oriented sports do see a decrease in male participation after the ages of 6-12. Indoor fitness activities see a huge increase in participation among males from ages 6-12 to 18-24, then level off until the mid-40s, where there is a slight spike in indoor fitness activities. Participation in indoor fitness activities decreases again as males move towards their late 40s and early 50s until leveling off for the older age segments.²⁴

²² Ibid.

²³ The *Outdoor Participation Report* does not include additional age categories above 45+.

²⁴ The Outdoor Foundation, *2013 Outdoor Participation Report*, 23.

When looking at just youth and young adult participation rates by gender and age, male participation rates dropped in ages 6-12 by 1.0% in 2012 to 66.0%, ages 13-17 increased by 1.0% in 2012 to 69.0%, and ages 18-24 dropped by 2.0% in 2012 to 58.0%. Female participation did the opposite, increasing in ages 6-12 by 2.0% in 2012 to 60.0%, dropping in ages 13-17 by 6.0% in 2012 to 51.0%, and increasing in ages 18-24 in 2012 to 56.0%.²⁵

Age Segments

The median age in the taxing district increased from 37.3 in 2000²⁶ to 40.2 in 2010, signifying an increasingly aging population. Figure 3 shows the age distribution in 2010 within the taxing district. Those ages 18 and older now make up 77.3% of the population, up from 75.0% in 2000, the 65+ age segment decreased slightly from 15.6% to 15.5%, and the 85+ age group went from 2.0% to 2.6%.²⁷ Cleveland Metroparks must plan for and anticipate the requirements and desires of an aging population while balancing the needs of all users.²⁸

²⁵ Ibid, 35.

²⁶ US Census Bureau/American FactFinder2, "DP-1: Profile of General Demographic Characteristics: 2000."

²⁷ US Census Bureau/American FactFinder2, "DP-1: Profile of General Population and Housing Characteristics 2010."

²⁸ "NEO CANDO 2010+ System."

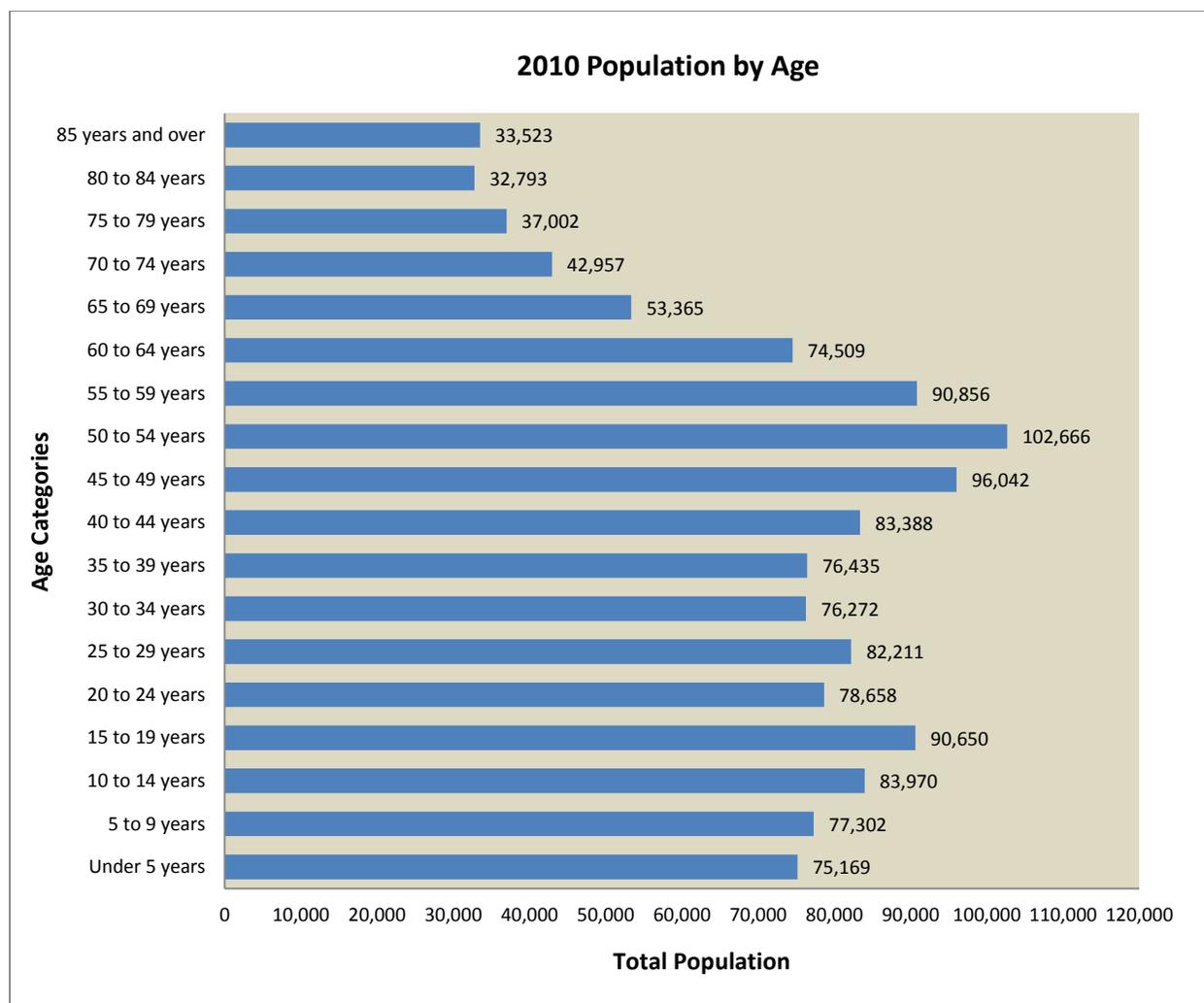


Figure 3. 2010 Population by Age

The percentage of total outdoor recreation participation in 2012 by individual age segments shows noticeable differences between younger and older age segments, with a steep drop off in participation for those over the age of 45:

- 63.0% of those ages 6-12;
- 60.0% of those ages 13-17;
- 57.0% of those ages 18-24;
- 57.0% of those ages 25-44; and
- 38.0% of those ages 45+.²⁹

²⁹ The Outdoor Foundation, *2013 Outdoor Participation Report*, 34.

When comparing the above percentages to those reported in the previous year's survey, the only age segment to decrease was those ages 13-17, dropping from 62.0% to 60.0%, and the only age segment to increase was those ages 25-44, going from 55.0% to 57.0%; all others remained the same.³⁰

The adult demographic provides an opportunity to introduce new activities. Outdoor activities with high percentages of first-time participants are listed below, along with the median age of the participant:

- Stand up paddling: 56%, median age of 28;
- Boardsailing/windsurfing: 43.0%, median age of 30;
- Non-traditional triathlon: 39.0%, median age 31;
- Traditional triathlon: 38.0%, median age 30; and
- Adventure racing: 36.0%, median age 29.³¹

With the top two outdoor activities among first-time participants being water related, consideration should be given to creating more opportunities for these activities at the Euclid Creek, Huntington, and Lakefront reservations.

Focusing on the youth and young adult age segments, the most popular outdoor activities are road, mountain and BMX biking and running, jogging and trail running, with biking ranked most popular among those ages 6-17 and running ranked most popular among those ages 18-24.³²

Motivation is another category that is important for outdoor recreation trends because it helps explain why people in different age segments participate in outdoor activities, and this information can be used by Cleveland Metroparks to create more opportunities that may interest people of various ages.

For youth and young adults the top motivational influences are:

- Being with family/friends for those ages 6-12 (77.0%);
- Getting exercise for those ages 13-17 (72.0%); and
- Getting exercise also for those 18-24 (74.0%).³³

Being with family/friends and getting exercise are also the top two reasons to get outdoors for all participants ages 6+, at 70% and 54%, respectively.³⁴

Race & Ethnicity

The minimum categories for data on race and ethnicity for federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. Definitions were updated during the 2010 Census cycle.

³⁰ Ibid.

³¹ Ibid., 15.

³² Ibid., 36-37.

³³ Ibid., 38.

³⁴ Ibid., 28.

- White – Refers to a person having origins in any of the original peoples of Europe, the Middle East, or North Africa. It includes people who indicated their race(s) as “White” or reported entries such as Irish, German, Italian, Lebanese, Arab, Moroccan, or Caucasian;
- Black or African American – This includes a person having origins in any of the black racial groups of Africa. It includes people who indicated their race(s) as “Black, African American” or reported entries such as African American, Kenyan, Nigerian, or Haitian;
- American Indian or Alaska Native – This refers to a person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment. This category includes people who indicated their race(s) as “American Indian or Alaska Native” or reported their enrolled or principal tribe, such as Navajo, Blackfeet, Inupiat, Yup’ik, or Central American Indian groups or South American Indian groups.
- Asian – This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, of the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. It includes people who indicated their race(s) as “Asian” or reported entries such as “Asian Indian,” “Chinese,” “Filipino,” “Korean,” “Japanese,” “Vietnamese,” and “Other Asian” or provided other detailed Asian responses;
- Native Hawaiian or Other Pacific Islander – this includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. It includes people who indicated their race(s) as “Pacific Islander” or reported entries such as “Native Hawaiian,” “Guamanian or Chamorro,” “Samoan,” and “Other Pacific Islander” or provided other detailed Pacific Islander responses;
- Some Other Race – Includes all other responses not included in the White, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or other Pacific Islander race categories described above. Respondents reporting entries such as multiracial, mixed, interracial, or a Hispanic or Latino group (for example, Mexican, Puerto Rican, Cuban, or Spanish) in response to the race question are included in this category; and
- Hispanic or Latino – this is an ethnic distinction, a subset of a race as defined by the federal government; this includes a person of Cuban, Mexican, Puerto Rican, Cuban, South or Central America, or other Spanish culture or origin, regardless of race. Hispanic origin can be viewed as the heritage, nationality group, lineage, or country of birth of the person or the person’s parents or ancestors before their arrival in the United States.³⁵

The data on race and ethnicity for people residing in Cleveland Metroparks taxing district was collected from NEO CANDO for white, black, Asian/Pacific Islander, Hispanic/Latino, and “other.”³⁶ Data for race and ethnicity for the country was collected directly from the US Census Bureau. The Census Bureau collects racial data in accordance with guidelines provided by the US Office of Management and Budget,

³⁵ Karen R. Humas, Nicholas A. Jones, Roberto R. Ramirez, “Overview of Race and Hispanic Origin: 2010, 2010 Census Briefs, (Washington D.C.: US Census Bureau, March 2011), 3.

³⁶ NEO CANDO compresses races into fewer categories. For example, Asian/Pacific Islander.

and these data are based on self-identification. Racial composition of the population provides guidance for decision making based on historical and cultural heritage.

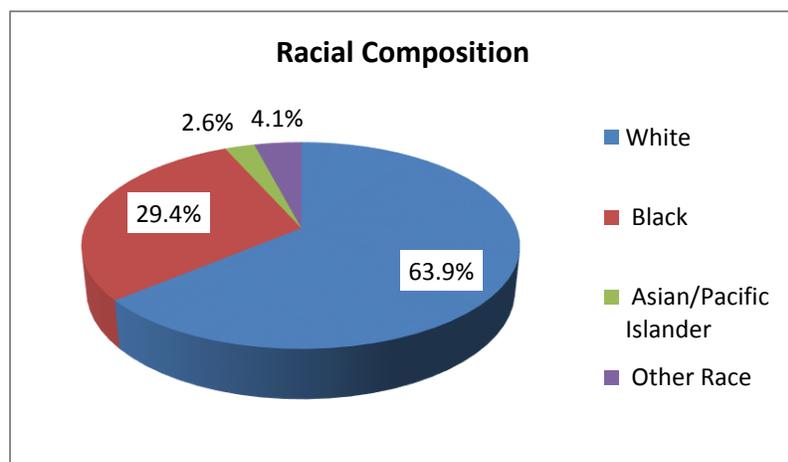


Figure 4. Racial Composition

In the case of the population served by Cleveland Metroparks, the past two decades have produced a much more diverse community. In 2000, 67.6% of the taxing district's population identified as white and 27.2% identified as black. Both of these races continue to account for the majority of the area's population; however, there has been fluctuation over the last decade with 63.9% of the taxing district's population now classifying

themselves as white and 29.4% classifying themselves as black.³⁷

Ethnicity as it pertains to those classified as Hispanic/Latino origin of any race accounts for a small but significant portion of the population Cleveland Metroparks serves. An estimated 61,394 people, or 4.8% of the total population within the taxing district, identified as having Hispanic/Latino origin (see Figure 5) as opposed to 16.4% nationally. This was a 30.2% increase in the Hispanic/Latino population since 2000.³⁸

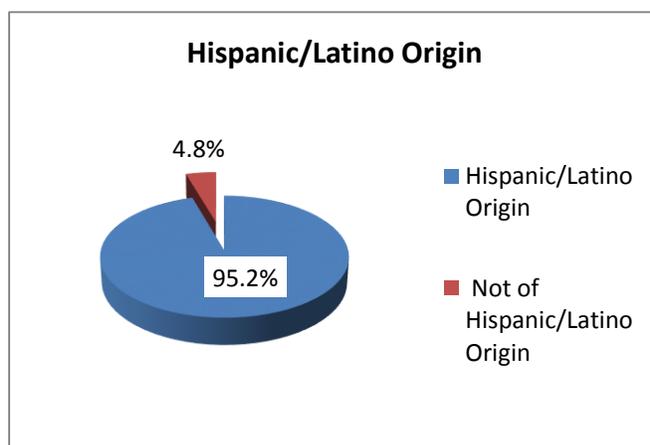


Figure 5. Hispanic/Latino Origin

Nationally, the white population as a whole participates in a wide range of activities, including both team and individual sports of a land and water based variety. Additionally, this group also participates in outdoor non-traditional sports.

Ethnic minority groups in the United States are strongly regionalized and urbanized, with the exception of Native Americans. Different ethnic groups have different needs when it comes to recreational activities and also have a varying participation in outdoor activities. For instance, Hispanic and Latino Americans have strong cultural and community traditions with an emphasis on the extended family,

³⁷ "NEO CANDO 2010+ System."

³⁸ US Census Bureau/American FactFinder2, "B03002: Hispanic or Latino Origin by Race," 2008-2012 ACS, US Census Bureau ACS Office, accessed July 26, 2014, <http://factfinder2.census.gov>.

many times gathering in large recreational groups where multiple activities geared towards all age segments of the group may participate.

The 2013 Outdoor Participation Report by The Outdoor Industry Association was used to gather participation rates among recreational and sporting activities by racial and ethnic groups for the US. For those who participate in outdoor activities the number of average annual outings does not differ greatly by race. Averages were 37 for Asian/Pacific Islanders, 39 for blacks, and 43 for both whites and Hispanic/Latinos.³⁹

According to the 2013 Outdoor Participation Report, the participation rate of race and ethnicity by age shows that the highest participation rates are for those 6-12 years for any of the five race/ethnicities. Whites report the highest outdoor participation rate across all age groups in the survey. (See Table 3). The age group with the lowest participation rate among all race/ethnicities is those ages 45+.⁴⁰

Table 2. 2013 Outdoor Participation Report: Participation Rate by Race/Ethnicity and Age

<u>Ages</u>	<u>White</u>	<u>Black</u>	<u>Asian/Pac Islander</u>	<u>Hispanic/Latino</u>
Ages 6-12	66.0%	54.0%	60.0%	56.0%
Ages 13-17	64.0%	46.0%	58.0%	53.0%
Ages 18-24	60.0%	45.0%	57.0%	49.0%
Ages 25-44	60.0%	47.0%	54.0%	54.0%
Ages 45+	40.0%	28.0%	36.0%	37.0%

Running, fishing, biking and camping are the most popular outdoor activities for all Americans regardless of ethnic or racial affiliations. The most popular outdoor activities for those classified as white in terms of total participation percentage rate are:

- Running, jogging and trail running – 18%;
- Freshwater, saltwater and fly fishing – 17%;
- Road, mountain and BMX biking – 16%;
- Car, backyard and RV camping – 16%; and
- Hiking – 14%.⁴¹

The most popular outdoor activities for those classified as black in terms of total participation percentage rate are:

- Running, jogging and trail running – 19%;
- Freshwater, saltwater and fly fishing – 11%;
- Road, mountain and BMX biking – 11%;
- Bird watching and wildlife viewing – 5%; and

³⁹ The Outdoor Foundation, *2013 Outdoor Participation Report*, 11.

⁴⁰ Ibid.

⁴¹ Ibid., 48.

- Car, backyard and RV camping – 4%.⁴²

The most popular activities for those classified as Asian/Pacific Islander in terms of total participation percentage rate are:

- Running, jogging and trail running – 24%;
- Road, mountain and BMX biking – 14%;
- Hiking – 13%;
- Car, backyard and RV camping – 10%; and
- Freshwater, saltwater and fly fishing – 9%.⁴³

The most popular activities for those classified as Hispanic/Latino in terms of total participation percentage rate are:

- Running, jogging and trail running – 22%;
- Road, mountain and BMX biking – 17%;
- Freshwater, saltwater and fly fishing – 14%;
- Car, backyard and RV camping – 11%; and
- Hiking – 9%.⁴⁴

Even though the majority of the top five most popular outdoor activities are similar among all races/ethnicities, Asian/Pacific Islanders and Hispanic/Latinos participate more in a form of running compared to those classified as black or white. An interesting note from this is that those who classified as black did not choose hiking as one of their top five outdoor activities. Instead, they participate more in bird watching and wildlife viewing than either those classified as white, Asian/Pacific Islander or Hispanic/Latino.

Disability Status

There are currently 179,606 persons with a disability living within the taxing district, or about 14.1% of the population. For those ages 65+, the rate rises to 37.1%, or 71,158 people.⁴⁵ Due to changes in how disability is reported, comparisons to 2000 data are not one-for-one and are therefore not included. Cleveland Metroparks seeks to provide access and opportunities to all users within the Park District, including those individuals with disabilities. Buildings and all-purpose trails are designed to accommodate all users.

Households & Income

This decline in household income and increase in the number of people living below the poverty line are indicators of the economic struggles Northeast Ohio has faced over the last decade, having been extremely hard-hit by the foreclosure crisis and larger shifts in the employment sector. The Greater

⁴² Ibid.

⁴³ Ibid.

⁴⁴ Ibid.

⁴⁵ US Census Bureau/American FactFinder2, "B18101: Sex by Age by Disability Status," 2008-2012 ACS, US Census Bureau ACS Office, accessed July 26, 2014, <http://factfinder2.census.gov>.

Cleveland area, along with many other former manufacturing centers in the Midwest, has seen an increase in lower paying service sector jobs and continued contraction in higher paying jobs in the manufacturing, information, and utility fields, coupled with the dynamics of a shrinking and aging population.

The taxing district's household count has changed from 575,649 as reported in Census 2000 to an estimated 549,681 in 2010, a change of -0.5% annually.⁴⁶ The *Vibrant NEO 2040*, a recent 12-county sustainability framework, places household totals at 523,263 in 2020 for Cuyahoga County, a projected change of -0.6% annually from the 2010 Census.⁴⁷ Both percentages are lower, but still similar to the overall trend of shrinking US households. For the population served by Cleveland Metroparks, average household size is currently estimated at 2.34 persons, compared to 2.39 in the year 2000. The number of families is 315,798.⁴⁸

Currently, it is estimated that 53.6% of the 626,664 housing units in the taxing district are owner occupied, 34.1% are renter occupied, and 12.3% are vacant. The percentage of housing units that are renter occupied has stayed roughly the same since 2000. The percentage of owner occupied housing units and vacant housing units went in opposite directions of each other since 2000, with the percentage of owner occupied housing units dropping from 58.7% in 2000 and vacant housing units increasing from 7.4% in 2000. The median home value in the taxing district is \$130,900, compared to \$181,400 for the US and \$133,700 for the state.⁴⁹

The following are household income characteristics. On all household and per capita income measures shown, the taxing district's income trails the US. See also Figure 6.

- Current median household income for the taxing district is \$48,033, compared to \$53,046 for all US households.
 - Median household income for Northeast Ohio is projected to reach \$48,300 by 2015, 12.3% less than the US level.
 - In 2000, median household income was \$42,255, slightly higher than the US median household income of \$42,148.
- Current average household income is \$63,037, compared to \$73,034 for all US households.
 - In 2000, average household income was \$54,874, 3.1% less than the national average, which was \$56,604 in 2000.
- Current per capita income is \$27,136, compared to the US per capita income of \$28,051.
 - In 2000, the per capita income was \$22,272, which was above the national per capita income of \$21,587.⁵⁰

⁴⁶ "NEO CANDO 2010+ System."

⁴⁷ *Vibrant NEO 2040*, (Northeast Ohio Sustainable Community Consortium, 2014), 55.

⁴⁸ US Census Bureau/American FactFinder2, "S1101: Households and Families."

⁴⁹ "NEO CANDO 2010+ System."

⁵⁰ Ibid.

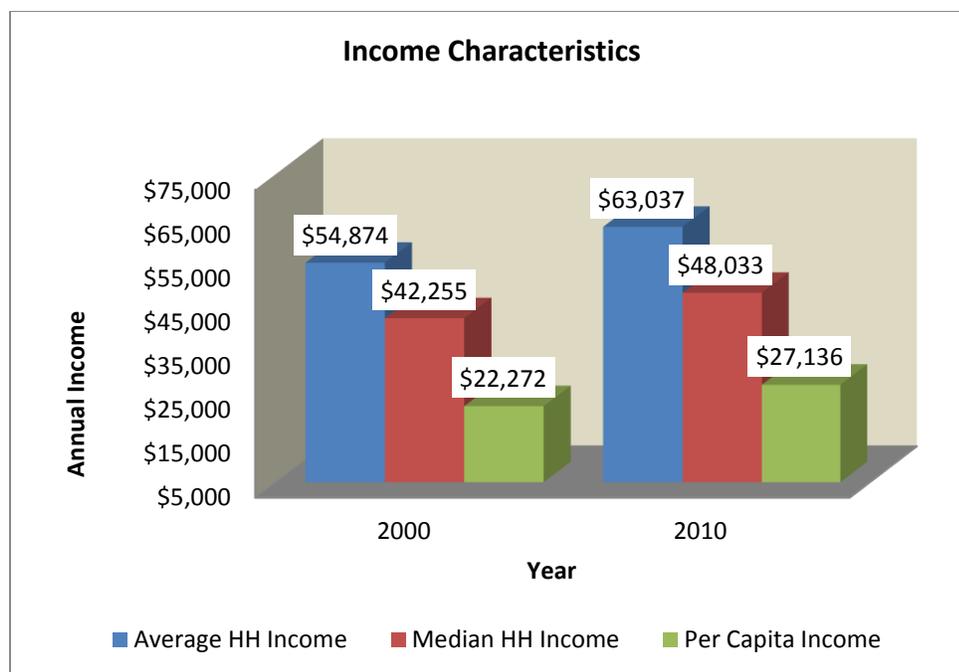


Figure 6. Income Characteristics

In terms of disposable income – income available for household and personal expenditures after all applicable taxes – households within the taxing district had an estimated average disposable income of \$51,473. Average disposable income by age of householder ranks as follows:

- Age of householder 45-54 – \$59,478 average disposable income;
- Age of householder 55-65 – \$59,471 average disposable income;
- Age of householder 35-44 – \$54,953 average disposable income;
- Age of householder 65-74 – \$46,713 average disposable income;
- Age of householder 25-34 – \$45,549 average disposable income;
- Age of householder 75+ – \$39,359 average disposable income; and
- Age of householder <25 – \$38,655 average disposable income.⁵¹

According to the 2012 Comprehensive Parks and Recreation Strategic Plan Demographic and Trends Analysis prepared for Cleveland Metroparks spending on entertainment and recreation accounts for approximately 4.9% of the total household budget.⁵²

Commuting Characteristics & Access to a Vehicle

The mode of transportation to work and access to a vehicle is another important factor used in planning and programming for Cleveland Metroparks, and access to parks and programs via public transit, bicycling, or walking is an important consideration for current programming and future park expansion.

⁵¹ “Comprehensive Parks and Recreation Strategic Plan Demographic and Trends Analysis,” (Pros Consulting for Cleveland Metroparks, December 2012), 11.

⁵² PROS Consulting LLC, *Cleveland Metroparks Demographic and Trends Analysis*, 11.

The mode of transportation to work that is most popular in the taxing district is driving alone in a car, truck or van with 455,871 (79.7%) persons driving alone.⁵³ The total number of persons who drive alone to work is down from 2000, when it was 493,812,⁵⁴ but the overall percentage has risen (78.8%). The decline in the number of people driving alone is largely attributed to the declining population in the labor force, which went from 626,355 persons to 571,998.

The percentage of people in the labor force that drive alone to work in the taxing district is slightly higher than the national rate of 76.1%; however, it is lower than the state's rate of 83.1%. The number of persons who carpooled to work or took public transportation is also down from 2000, with carpooling to work going from

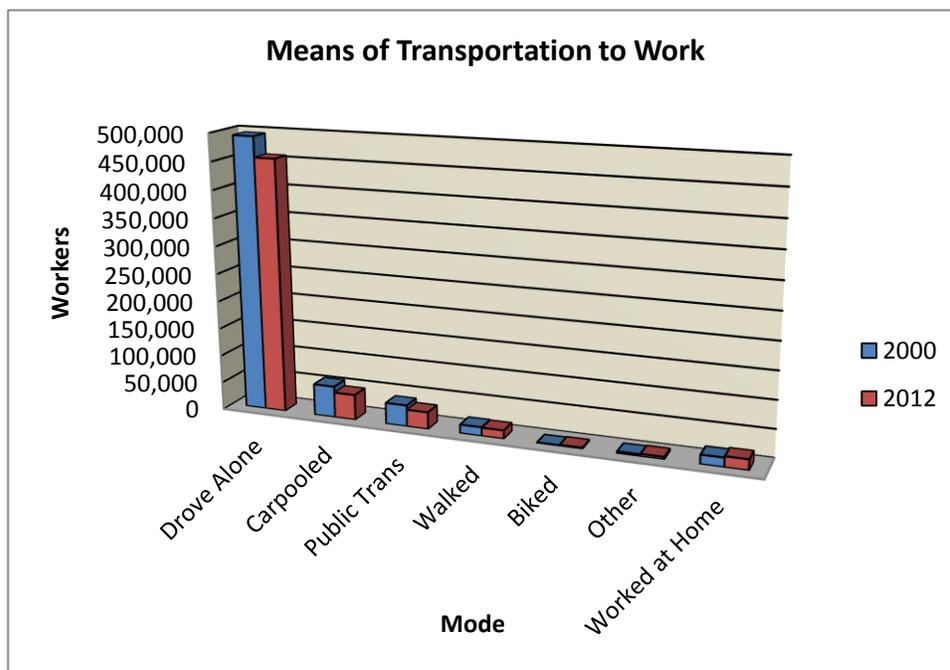


Figure 7. Means of Transportation to Work

9.1% to 8.0% and public transportation going from 6.1% to 5.3% of the labor force. The number of people who walk to work has also decreased, going from 15,700 to 14,916, as depicted in Figure 7; however, the rate has increased by 0.10%, going from 2.51% in 2000 to 2.61%. This is right between the state level of 2.3% and the national level of 2.8%. The numbers for biking to work, other means of transportation and working from home have all increased since 2000. The number of persons biking to work went from 1,122 in 2000 to 1,975, a 76.0% increase in the rate of bike commuters.⁵⁵

Better trail connectivity has been identified as an important pressing need among Northeast Ohioans. Some people in the labor force may feel limited to having to drive to work because there are no connecting trails near them or trails in general. Biking to work has been becoming increasingly popular in recent years in the US with the number of persons biking to work increasing at a rate of 5.4% annually. Overall, the number of persons who bike to work increased from 488,497 in 2000 to 785,665.⁵⁶

⁵³ US Census Bureau/American FactFinder2, "B08006: Means of Transportation."

⁵⁴ US Census Bureau/American FactFinder2, "QT-P23: Journey to Work: 2000."

⁵⁵ US Census Bureau/American FactFinder2, "B08006: Means of Transportation."

⁵⁶ Ibid.

RECREATION & LEISURE TRENDS

Overall Recreational and Leisure Trends

According to the Sporting Goods Manufacturers Association's *2012 Sports, Fitness and Leisure Activities Topline Participation Report*, there have been some changes in the way that Americans are choosing to spend their money on sports, fitness and leisure activities. The report captured spending plans for 2012 compared to 2011, stating that most "active" Americans plan to increase or spend at least the same rather than decrease spending in 2012. As depicted in Table 3, spending on lessons, instruction and camps, individual sports events, and team sports at school were expected to see the most people spending more money than in the prior year.⁵⁷

Table 3. 2012 Sports, Fitness, and Leisure Activities: Consumer Spending Plans

<u>Activity</u>	<u>Spend More</u>	<u>Spend Same</u>	<u>Spend Less</u>
Team Sports at School	22.8%	64.6%	12.6%
Team Sports Outside of School	21.6%	66.3%	12.4%
Travel for Sports and Rec	22.5%	64.2%	13.3%
Lessons, Instruction, Camps	24.5%	62.9%	12.2%
Gym Membership/Fees	20.7%	67.6%	11.7%
Individual Sports Events	23.1%	65.1%	11.3%
Golf Membership/Fees	15.5%	71.4%	13.7%
Tennis Membership/Fees	9.9%	76.2%	12.9%
Winter Sports	17.6%	66.8%	15.5%
Outdoor Recreation	20.7%	70.1%	9.2%
Sports/Rec Clothing	16.5%	69.2%	14.1%
Sports/ Rec Footwear	16.4%	70.4%	13.2%
Sports/Rec Equipment	16.0%	66.7%	17.3%

Throughout the past five years, participation in sports, fitness and related physical activities have remained steady. Fitness sports still remain the highest in terms of participation rates with 61.1% of individuals ages 6+ engaging. Outdoor sports and individual sports come in at numbers two and three with 49.4% and 36.7% of Americans participating, respectively.⁵⁸

Trends in Ohio

When looking at recreational trends on a statewide basis, there is a wide range of activities and sports that Ohioans are participating in, as well as a few activities that used to be popular, but are starting to slowly decline to make way for new trends. The *2013 Ohio Statewide Comprehensive Outdoor Recreation Plan (SCORP)* was referenced for detail on trends affecting the state and Northeast Ohio. The SCORP was prepared by the state "to guide outdoor recreation land acquisitions, facility development, programming and management in the state of Ohio for a four-year period planning period. The primary

⁵⁷ Sporting Goods Manufacturing Association, *2012 Sports, Fitness and Leisure Activities Topline Participation Report*, accessed August 7, 2014, assets.usta.com/assets/1/15/SMGA_Research_2012_participation_topline_report.pdf.

⁵⁸ Ibid.

goal of the 2013 Ohio SCORP is to provide a contemporary assessment of outdoor recreation in Ohio and to recommend ways in which public, private and independent agencies might strive to meet identified needs within the constraints of the state's social, economic and natural resources."⁵⁹

As part of development of the SCORP, focus groups were convened for the different regions in Ohio. The participants answered questions about recreational outdoor activities, and this data was compiled to give park professionals and other closely related outdoor associations information on emerging trends, overall participation, and barriers. The SCORP also conducted a statewide online survey. The survey points out barriers that are limiting the provision of outdoor recreational opportunities in Ohio, like financial reasons or loss of interest, and also notes new emerging trends, activities that are losing popularity, and ways to plan for the future. Cleveland Metroparks can use this information to align its programming and facility planning to better serve the community through education and conservation.

The results from the SCORP's Northeast Ohio focus group show that there are a few new trends that are emerging, including:

- Nature Play Areas – trees for climbing, fallen logs to walk across;
- Camp – demand is high for children's summer camp that offer a mix of outdoor skill activities with recreation, crafts and nature programs in a park setting;
- Multi-Generational Use – there are an increasing number of families enjoying outdoor recreation together;
- Adventure Activities – zip lines, ropes courses, obstacle courses, and climbing walls;
- Cost-Efficient Activities – in some regions, there is demand for competitive activities such as disc golf, dodge ball, kick ball, ultimate Frisbee, etc.; and
- Water-Based Recreation – swimming ranks among the most popular outdoor recreation activities. Paddle sports are becoming increasingly popular as well.⁶⁰

Cost-efficient activities can often be integrated into existing parks, and these activities have a low barrier to entry compared to sports like golf, lacrosse or hockey. With an economy that is still struggling, families may choose to move away from expensive sports. Disc golf is also an emerging trend according to Northeast Ohio focus group results depicted below, and has previously been incorporated into Cleveland Metroparks offerings.

SCORP Focus group participants cited as emerging activities, either newly introduced or gaining in popularity, for each of the following categories:

- Boating: kayaking and water trails;
- Camping: primitive camping and backpacking;
- Field & Court Sports: bocce ball, beach volleyball, soccer, and youth baseball;
- Golf: disc golf;

⁵⁹ *Ohio Statewide Comprehensive Outdoor and Recreation Plan*, (Columbus: Ohio Department of Natural Resources, 2013), 6.

⁶⁰ *Ibid.*, 62.

- Nature Based: nature centers, natural areas;
- Other Facilities: picnic shelters;
- Outdoor Skills: archery, orienteering, and outdoor skills programs;
- Trail Use, Multi-use Paved Trails: bicycling, walking, dog walking;
- Trail Use, Unpaved Trails: trail running, hiking, mountain biking;
- Wildlife Related: birding and fly fishing;
- Other Recreation: adventure cycling, dog walking, family activities with toddlers, remote control aircraft; and
- Other Recreation, Fitness: events with kayaking and running, fun runs and theme runs, endurance runs.⁶¹

Multi-use trails for hiking, walking and biking, camping areas and nature based recreation rank in the top three most important outdoor activities for survey takers. Along with these most important outdoor activities, the top two pressing needs for outdoor recreation opportunities are better trail connectivity and more multi-use trails. Cleveland Metroparks has already identified the need for a connected trail and greenspace system in its strategic plan and is actively working internally and with various community partners and other organizations to expand this network.

Trail Use Activities

The SCORP online survey included detailed questions about the participation rate and frequency of outings for users across a variety of areas. The first, trail use activities, is one of the most essential ways for multiple generations to participate in outdoor activities. Trails attract people who are looking to exercise, have fun, and get outdoors and enjoy nature. Among the SCORP online survey takers, the following information was reported for trail-related activities:

- Hiking, walking and jogging
 - 21.2% at least one time per week;
 - 24.7% at least 1-2 times per month; and
 - 36.9% at least a few times per year.
- Bicycling on a path
 - 13.0% at least one time per week;
 - 16.1% at least 1-2 times per month; and
 - 24.9% at least a few times per year.
- Bicycling for transportation
 - 6.2% at least one time per week;
 - 5.8% at least 1-2 times per month; and
 - 13.1% at least a few times per year.
- Mountain biking
 - 7.6% at least one time per week;
 - 5.4% at least 1-2 times per month; and

⁶¹ Ibid.

- 10.0% at least a few times per year.
- Horseback riding
 - 5.7% at least one time per week;
 - 3.6% at least 1-2 times per month; and
 - 4.7% at least a few times per year.
- Trail running
 - 5.8% at least one time per week;
 - 6.2% at least 1-2 times per month; and
 - 10.9% at least a few times per year.⁶²

According to the SCORP, park professionals in the northeast region of Ohio reported that mountain biking trails are heavily used, there is an increase in trail running, and that multi-use trails are in high demand as walking, hiking, and bicycling remain popular in Northeast Ohio. Cleveland Metroparks should continue to consider the usage of its current trails network to see if some could become shared use or transitioned to a new use to meet future demand.

Wildlife Activities

Wildlife activities are popular for families and other users and are cost effective, requiring almost no special equipment. Bird watching and wildlife viewing/photography ranked numbers one and two among SCORP survey takers for wildlife activities, as shown below:

- Bird watching
 - 11.8% at least one time per week;
 - 11.0% at least 1-2 times per month; and
 - 27.3% at least a few time per year.
- Wildlife viewing/photography
 - 11.4% at least one time per week;
 - 17.0% at least 1-2 times per month; and
 - 32.63% at least a few times per year.⁶³

Hunting, fishing from the shoreline and fishing from a boat were also reported on as part of the SCORP.

Aquatic Activities

Aquatic activities include swimming, boating and other water-based activities. According to the SCORP, "Swimming ranks among the most popular outdoor recreation activities among Ohioans. One of the main attractions that are attracting tourists and local families are the Lake Erie beaches and the sand beaches on inland lakes."⁶⁴ Unfortunately, some swimming pools around Ohio have closed due to declining attendance and cost of maintenance. Splash pads and spray parks are a cost effective

⁶² *Ohio Statewide Comprehensive Outdoor and Recreation Plan Appendices*, (Columbus: Ohio Department of Natural Resources, 2013), B-1.

⁶³ *Ibid.*, B-3.

⁶⁴ *Ohio Statewide Comprehensive Outdoor and Recreation Plan*, 14.

alternative to enjoying the water without the larger costs of operating and maintaining a community swimming pool.

Besides basic water sports like swimming, paddle sports are rapidly increasing across the state of Ohio, mostly along the coast of Lake Erie. One of the things that Ohioans ranked high among the most pressing needs identified was improved access for kayaks and canoes on Ohio waterways. According to the SCORP, "The National Park Service and the Ohio Parks and Recreation Association have already identified this pressing need of better waterway access and have helped by developing designated water trails for paddlers. Since 2008, the number of water trails in Ohio has tripled, with the addition of the Great Miami River, Mad River, Mahoning River, Mohican River, Stillwater River and Vermilion-Lorain water trails."⁶⁵

Canoeing, kayaking on a stream and non-motorized boating on a lake rank number one and two in terms of participation among SCORP survey respondents:

- Canoeing and kayaking on a stream
 - 2.1% at least one time per week;
 - 6.0% at least 1-2 times per month; and
 - 28.6% at least a few times per year.
- For non-motorized boating on a lake
 - 1.9% at least one time per week;
 - 5.2% at least 1-2 times per month; and
 - 20.3% at least a few times per year.⁶⁶

Sailing, pontoon or pleasure boating, power boating or waterskiing, jet skiing and paddle boarding rank three, four, five, six and seven, respectively, for most popular boating activities among participants.

Although boating activities, both motorized and non-motorized, are emerging and becoming more popular among Ohioans, the number one reason why those who indicated they were interested in the activity but did not participate was due to the equipment needed.⁶⁷ This is likely due to the initial cost of purchasing and maintaining boats and other watercraft. However, with these emerging activities and Northeast Ohio's location on Lake Erie, this opens up the opportunity for rentals of boating and water activities. Canoeing and kayaking ranked number one for those saying they were interested but did not participate among survey takers. Cleveland Metroparks could continue to look into how best to serve this demographic of people by providing rentals and contributing to these emerging and popular activities.

Swimming in a lake, pond or river and swimming in a traditional pool rank number one and two among SCORP survey takers for participation and frequency:

- Swimming in a traditional pool;

⁶⁵ Ibid.

⁶⁶ *Ohio Statewide Comprehensive Outdoor and Recreation Plan Appendices*, B-4.

⁶⁷ Ibid.

- 6.0% at least one time per week;
- 11.5% at least 1-2 times per month; and
- 32.6% at least a few times per year.
- Swimming in a lake, pond or river
 - 2.5% at least one time per week;
 - 8.0% at least 1-2 times per month; and
 - 33.8% at least a few times per year.⁶⁸

Swimming in a pool complex and cooling off at a spray park also recorded participation from survey takers. Although cooling off at a spray park ranks number four under swimming activities and is a cost effective way to enjoy the water without having to worry about the maintenance of a pool, it ranks number one with 60.0% participants who are not interested in using such an amenity.⁶⁹

Field & Court Sports

Generally, Cleveland Metroparks does not consider field and court sports as related to the core mission of conservation, recreation, and education. Some parks include ballfields, however, most facilities were existing when the property was acquired by the Park District. All reservations include large, unprogrammed grassy areas suitable for pick-up play, consistent with passive recreation in conjunction with picnicking and family outings. While not currently part of the Park District's standard program, a brief analysis of current trends in field and court sports is included for reference.

Among traditional field & court sports, basketball has the highest level of participation in America according to the *2012 Sports, Fitness and Leisure Activities Topline Participation Report* by the Sporting Goods Manufacturers Association. This popularity can be attributed to the ability to compete with relatively small number of participants, the limited amount of equipment needed to participate, and the limited space requirements necessary. Baseball/softball ranks second in the US for most participated in sport among traditional field & court sports, and soccer was the third.⁷⁰

As part of the SCORP, Northeast Ohio park managers noted that some traditional facilities are declining in use, including tennis courts and baseball diamonds, but outdoor soccer and baseball/softball rank first and second among Ohio participants, as follows:

- Baseball/softball
 - 1.7% at least one time per week;
 - 3.2% at least 1-2 times per month; and
 - 9.0% at least a few time per year.
- Outdoor Soccer
 - 2.0% at least one time per week;
 - 2.3% at least 1-2 times per month; and

⁶⁸ Ibid., B-5.

⁶⁹ Ibid.

⁷⁰ Sporting Goods Manufacturing Association, *2012 Topline Participation Report*, 34-36.

- 5.6% at least a few times per year.⁷¹

Surprisingly, in the SCORP, only 0.5% of participants said they participate at least one time per week in outdoor basketball and 1.7% said they participate at least 1-2 times per month, though 9.2% reported participating at least a few times per year.⁷²

Outdoor Recreation & Camping

Looking at the results from the SCORP's online survey, the top outdoor recreation activities are skateboarding, BMX biking on a BMX course, playing paintball, going to parcours/exercise area, going to a dog park, kite flying/remote control and playing on a playground. Even though these are the top seven results among the responses, these activities do not appeal to all users and large numbers likewise report they would not be interested in participating. Among respondents, skateboarding/skating had 92.5% say they were not interested, second was BMX biking on BMX course with 90.4%, and third was paintball with 78.2%. Playgrounds, however, had the highest number of overall participants at 38.2%.⁷³

The SCORP survey showed group camping as the highest activity with 17.8% of people participating at least a few times per year. Electric site or developed campground camping ranked second with 25.3% participating, and non-electric site or developed campground camping ranked third with 24.1% participants. As shown in Table 4, camping areas are ranked second on the list of recreational opportunities that are most important to Ohioans with 30.3%.⁷⁴

Table 4. SCORP Most Important Recreational Opportunities for Northeast Ohio Participants

<u>Recreation Opportunities</u>	<u>Percentage of Responses</u>
Multi-use trails-hiking/walking/biking	57.5%
Camping areas	30.3%
Nature based recreation	20.6%
Fishing access	19.6%
Cabins/overnight facilities near parks	18.5%
Birding/wildlife observation areas	18.2%
Dog friendly areas	16.6%
Hunting areas	15.2%
Bicycle routes for transportation	14.9%
Picnic areas	14.3%
Swimming	14.2%
Motorized trails	14.1%
Archery/shooting sports	11.9%
Motor boating facilities	11.3%
Playgrounds at a park	10.7%
Golf	6.0%
Winter sport areas	6.3%

⁷¹ *Ohio Statewide Comprehensive Outdoor and Recreation Plan Appendices, B-6.*

⁷² *Ibid.*

⁷³ *Ibid.*, B-9.

⁷⁴ *Ibid.*, B-12.

Grassy fields for self-directed play	4.0%
Field and court sports at a park	2.7%
Other	19.5%

Barriers to Outdoor Recreation

Among the SCORP's Northeast Ohio focus group, one of the main barriers to participation in outdoor recreation was the distance to facilities. Populations without a personal vehicle transportation may struggle with access to recreation facilities that are too far away to walk or bike to, or are not along transit routes. Some trail users also struggle with facilities because they might have to drive several miles to the nearest trailhead to enjoy walking or biking. The casual users of recreational facilities have identified that although some facilities are conveniently located, they are also heavily used for league play or lessons and may not always be available for more casual users. According to the SCORP:

Some barriers are merely perceived, and may be related to misconceptions about outdoor recreation. Potential park users may stay away because they perceive the outdoors as dangerous and may harbor fears of falling victim to crime in public areas such as parks. Some potential users dislike strenuous activity, and do not believe parks offer opportunities for them. Some adults who were not exposed to outdoor recreation experiences, as children do not, in turn, pass along outdoor recreation as a family tradition. These children and their parents may lack the skills and interest in unstructured outdoor play and self-directed recreation. As a result, younger generations may not value recreation opportunities, they may take public parks for granted, and they are not as likely to respond to appeals for donations for facilities.⁷⁵

Pressing Needs

The SCORP survey also asked what the people of Ohio believe to be the most pressing needs in regards to recreation opportunities. As depicted in Table 5, better trail connectivity, more multi-use trails and restrooms and water fountains at trails rank first, second and third out of 22 other pressing needs.⁷⁶

Table 5. SCORP Pressing Needs Among Northeast Ohio Participants

Pressing Needs	Percentage of Responses
Better trail connectivity	28.4%
More multi-use trails	25.4%
Restrooms & water fountains at trails	21.9%
More nature programs	14.6%
Flush restrooms	14.3%
Cabins, overnight facilities in/near park	12.9%
More ATV trails	11.8%
Better maintained facilities	10.5%
Adult fitness/wellness programs	10.2%
Offer equipment to rent	9.7%
Wi-Fi at parks	9.2%
Dog park	8.2%
More directional & informational signs	7.6%
More paddling access	7.6%

⁷⁵ *Ohio Statewide Comprehensive Outdoor and Recreation Plan*, 68.

⁷⁶ *Ohio Statewide Comprehensive Outdoor and Recreation Plan Appendices*, B-15.

More neighborhood parks	7.2%
Swimming pools with water features	6.0%
Wider ATV trails	4.4%
More picnic shelters	3.8%
Disc golf courses	3.1%
Handicapped accessible playgrounds	2.2%
More ball fields, sport fields or courts	1.6%
Other	25.0%

Northeast Ohio Demographic Trends

One of the demographic trends that the SCORP Northeast Ohio focus group identified was that there are more seniors using parks in the region than there were in previous years. Many of these seniors are seeking passive recreation opportunities as well as fitness programs like yoga, tai chi, walking and water aerobics that are tailored towards older adults. It has also been identified that trail use is starting to take on a social aspect as more families are utilizing bike trails together and more teens are using walking paths and trails as a meeting point.

There are a few activities identified by the Northeast Ohio focus group that have fallen in popularity.. The SCORP states, “Some park managers have noticed a decline in traditional facilities including tennis courts, baseball diamonds, and swimming pools and swimming beaches at lakes. Trends that appear to have run their course in the region include paintball, ultimate Frisbee, skateboarding, dodge ball, kick ball, kite flying, and cross-country skiing. In some areas, park managers have noticed a decline in golf, horseback riding and skateboarding, while others find that these activities are still in demand.”⁷⁷

⁷⁷ *Ohio Statewide Comprehensive Outdoor and Recreation Plan, 63.*

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