

Trends Worth Talking About

California and Pacific Southwest
Recreation and Park Training
Conference, March 2005

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California State Parks



Presentation Goals:

- Describe five far-reaching trends affecting the park and recreation profession.
- Discuss the magnitude of implications for each of these trends that will need to be addressed to maintain the professions' relevance and value.

Resources

- **U.S. Census / Dept. of Finance**
- **Public Opinions & Attitudes on Outdoor Recreation in CA – 2002**
- **NSRE Survey**
- **Outdoor Industry Assoc. Survey**
- **Tappan Munroe Report – CPRS / VIP**
- **California Fast Facts 2003, CA Tourism**
- **Outdoor Recreation in America 2003 RoperASW**
- **Other articles & reports**



“We need to seek the meeting point between what is right in theory and what could be achieved in practice.” *author unknown*



Five Broad Trend Categories

1. Population Changes
2. The Effects of Technology
3. Recreation Programs & Activities
4. Changing Time Patterns
5. Administrative/Policy Trends

To remain relevant, park and recreation professionals need to know:

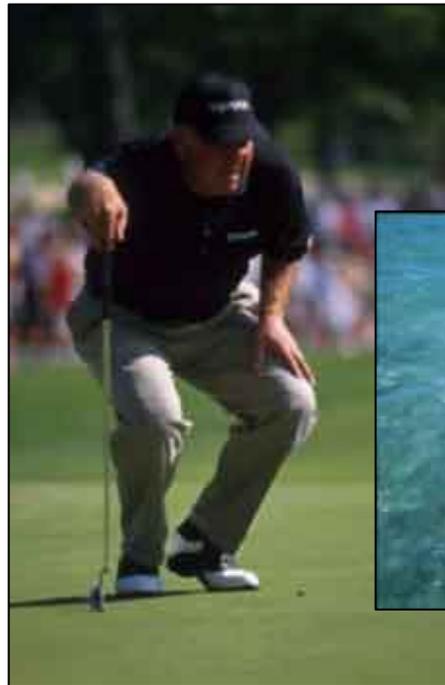
- *What* demographic trends do you need to know and *why*?
- *Which* outdoor recreation activities do Californians favor most?
- *What* activities would they like to do more if opportunities were available?
- *What* would they be willing to pay?
- *How* do they score suggested improvements?
- To pay for services, *what* revenue sources do they favor?

Exercise: *Your* turn

As a park and recreation professional, how will these trends affect your ability to provide quality programs, services and facilities?

1. Population

The Changing Face of Californians



Changes in the size and structure of California's population will have the most dramatic impact on the ability to provide quality services.



California is Growing

- Over 35 million residents
- 550,000 – 650,000 Californians added each year
- 1 in 8 U. S. Citizens lives in CA



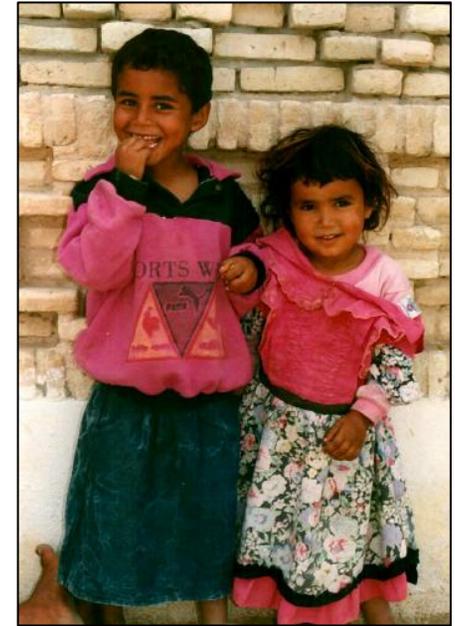
We're growing older

- By 2010, 1 in 5 will be older than 60
- By 2020, California's senior population will double



We're growing younger

- Two full years
younger than
U. S. average
- Fueled by recent
immigrants



...and we're getting even
more diverse!

- Over one-third (36.1%) of Asian-Americans live in California
- Nearly one-third (31.1%) of Hispanic-Americans live in California

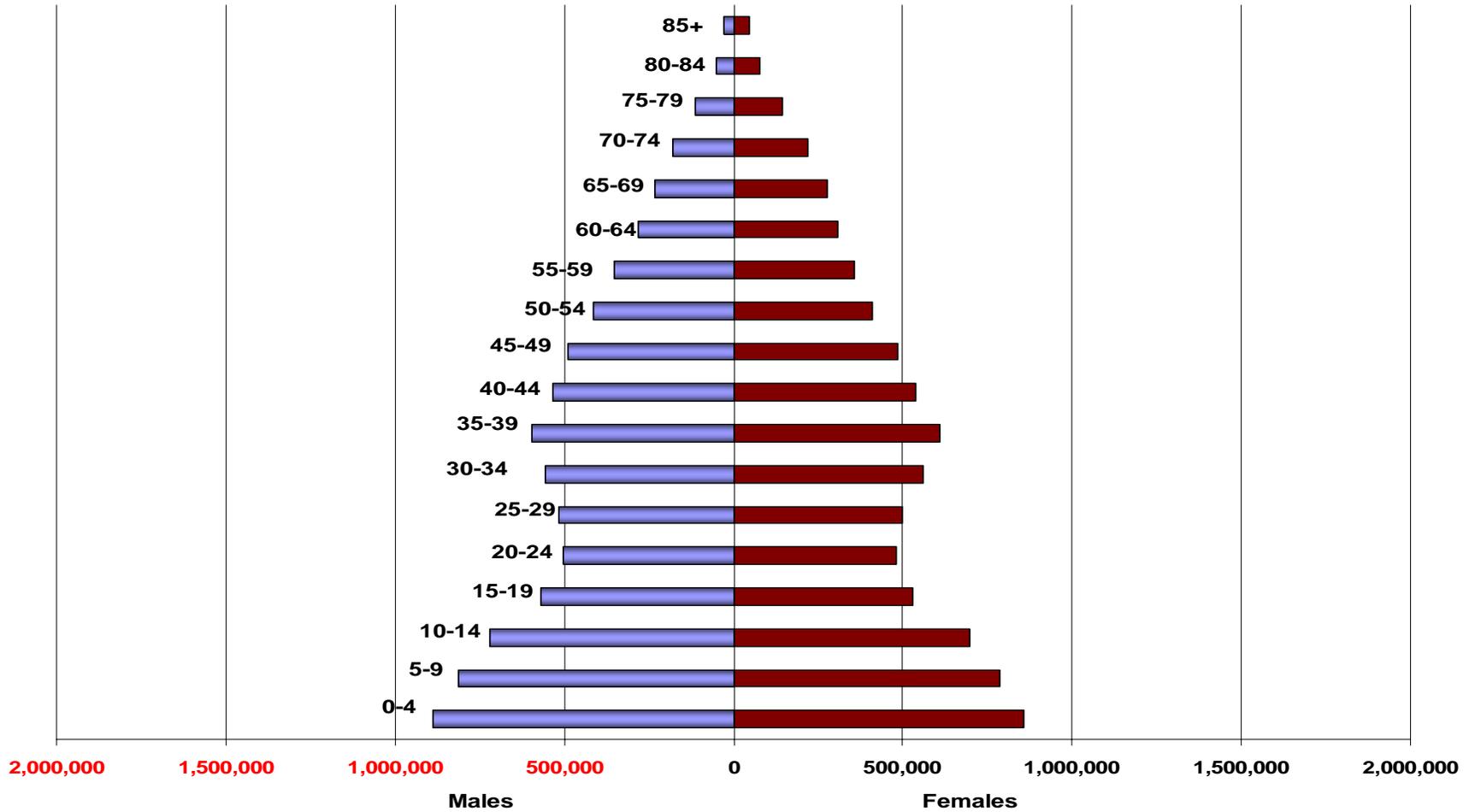
- 26% of current Californians were born outside U.S. compared to 11% nationally

- 37% of California's foreign born arrived since 1990



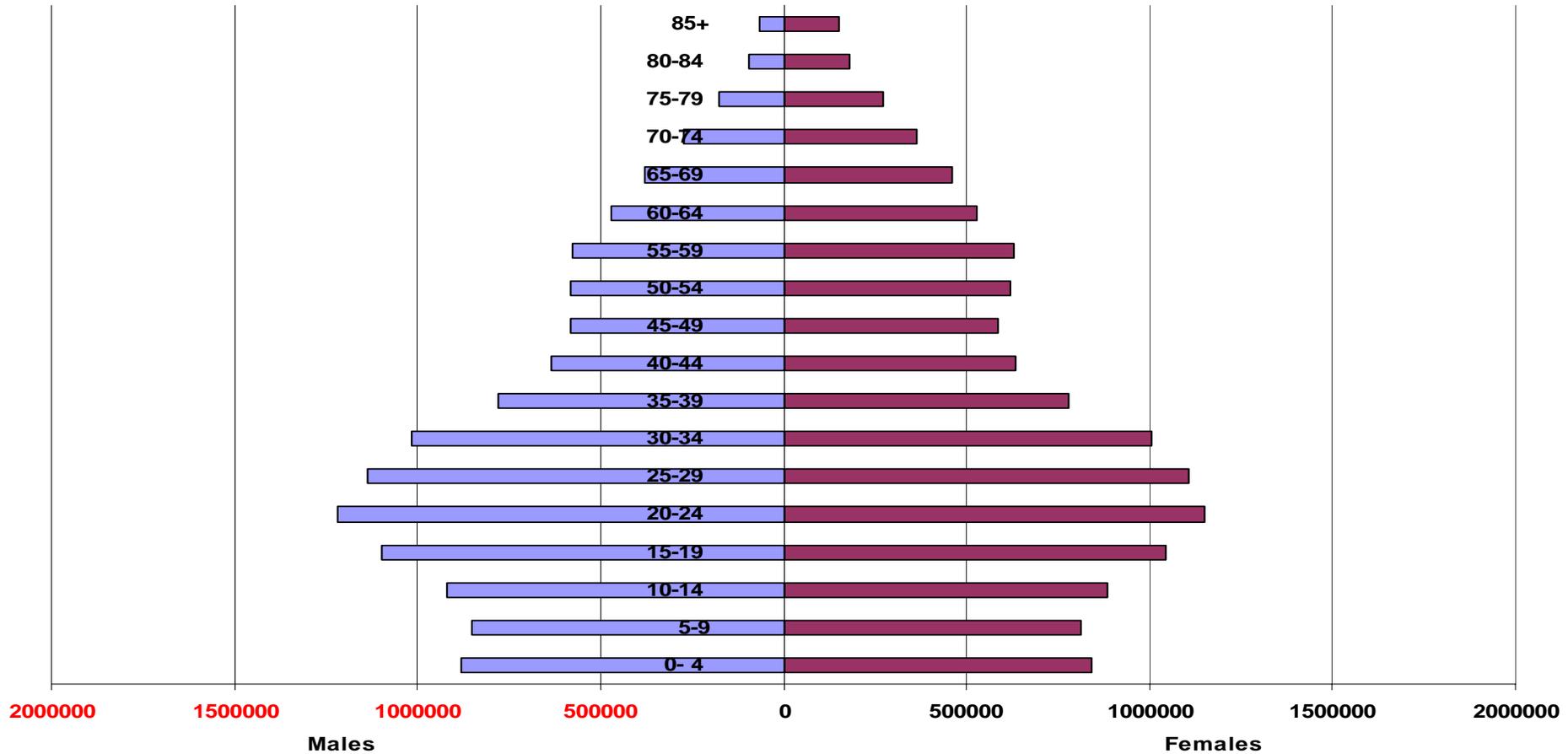
1960

California Population 1960 (Source: CA Dept. of Finance)



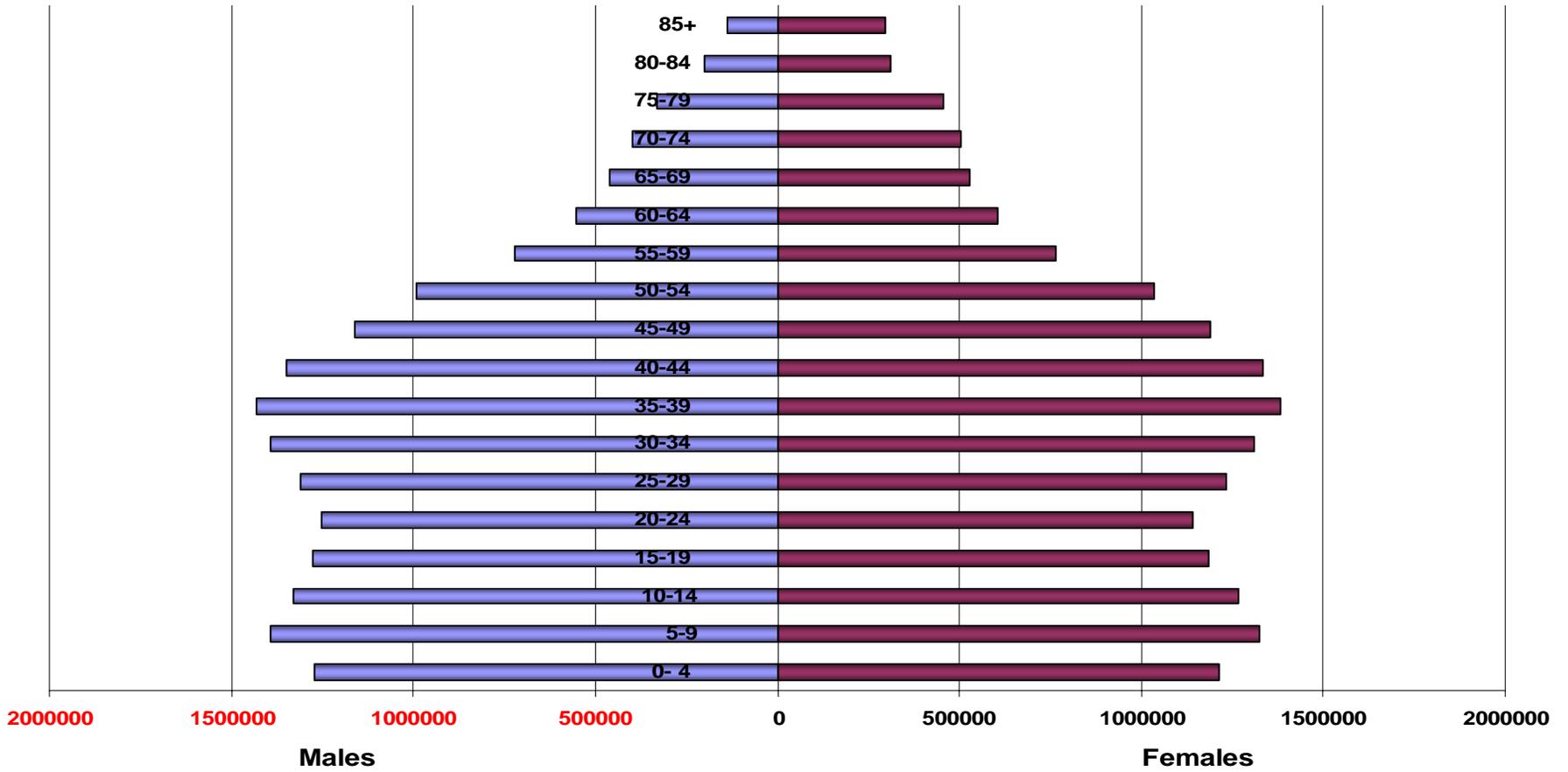
1980

California Population 1980 (Source: UCData Center/CA Dept. of Finance)



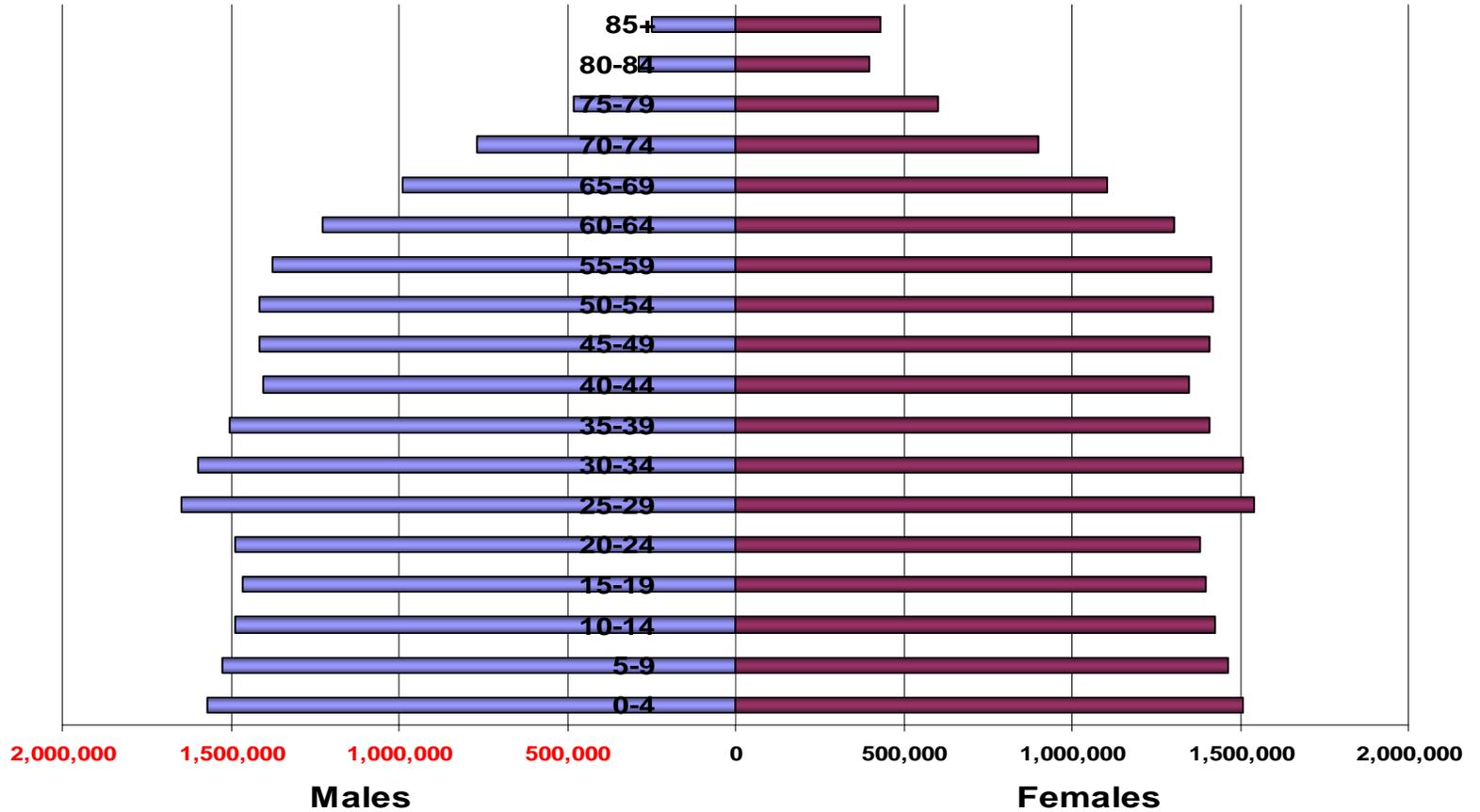
2000

California Population 2000 (Source: CA Dept. of Finance)



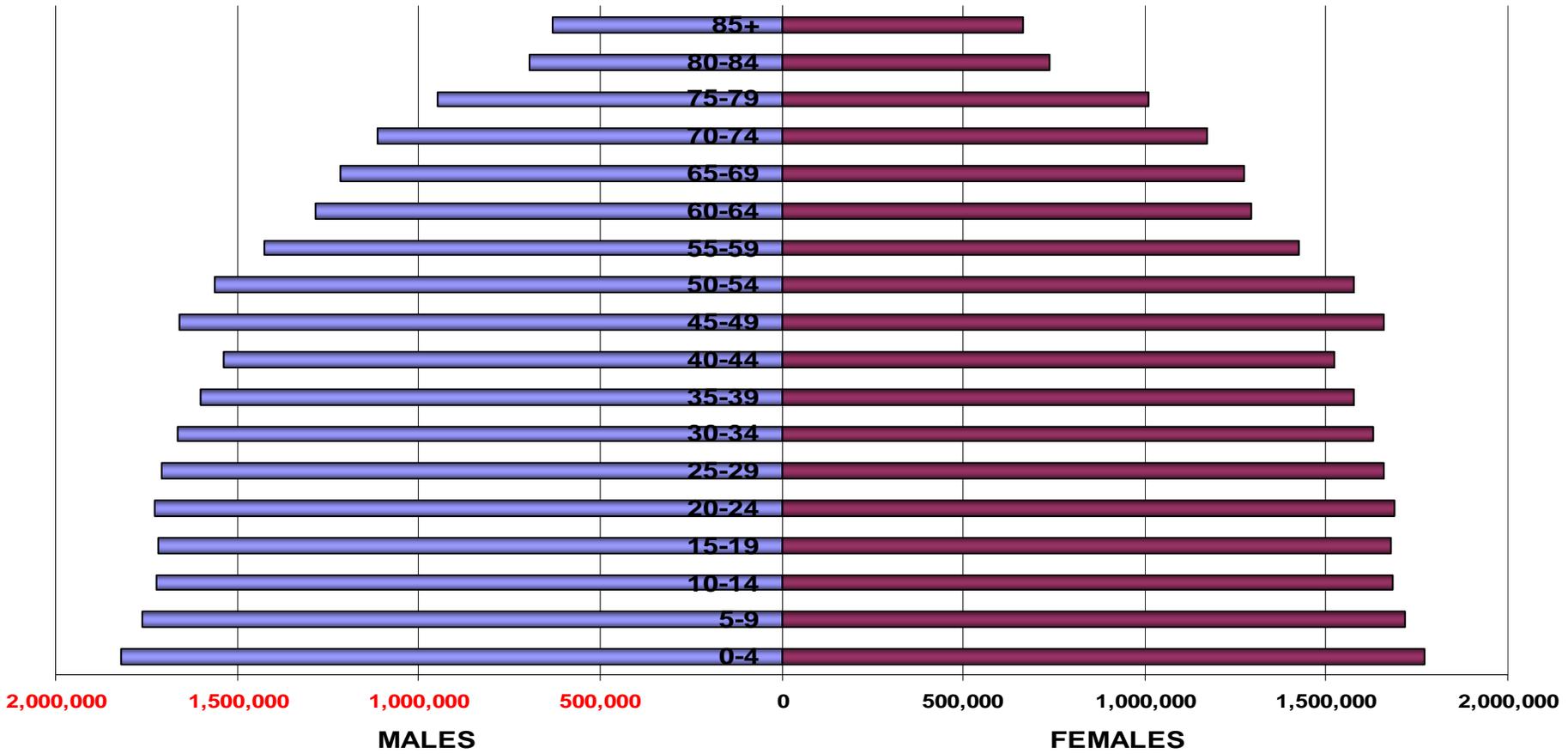
2020

California Population 2020 (Source: CA Dept. of Finance)



2040

California Population 2040 (Source: CA Dept. of Finance)



Implications to Population Changes

- Older Californians will age differently than how our parents/grand parents did.
- New immigrants not familiar with traditional programs or processes.
- Some providers will face relevancy issues while others may prosper.

2. Technology

A double-edged sword



Americans *love* their toys and Baby Boomers expect “amenity – rich” experiences.



- Technology will continue to affect how we work and how we play.
- Each generation: better educated, more adept with, and more dependant on, technology than the previous generations.
- Technological advances affect the affordability, accessibility and required skill level of many recreational activities.

Technology allows “mass customization”

Technology allows people to:

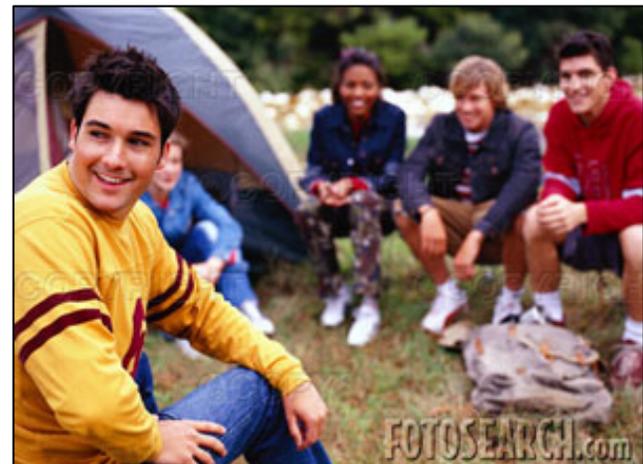
- Get more information, more quickly
- Feel safer
- Generally be more comfortable
- Stay connected

New activities will be developed around innovative devices and products.



Yet...

- Technology creates whole new recreation uses.
- People tend to self-define and organize around their chosen form of recreation.
- Each group tends to want (demand) their own exclusive allocation of resources.



Implications of Technology

- Pressure on managers/providers to accommodate the needs of special interests.
- More demands on providers to accommodate technology. People want to bring their technology with them while recreating.
- May see “Techno-Free” park areas.
- Information sharing is fast and readily available.

3. Activities

So much to do...



Activities

Most Popular Activities

Walking for fitness
Driving for pleasure
Visiting historic sites & museums
Outdoor cultural events
Beach activities
Visiting nature museums
Picnicking
Wildlife viewing
Hiking
Using turfed areas

Most Preferred Activities

Camping in developed sites
Hiking
Walking for fitness
Wildlife viewing
Bicycling (paved)
Horseback riding
Freshwater fishing
Attending cultural events
Visiting outdoor nature museums
Picnicking

Growing Activities

- Walking
- Picnicking and family gatherings outdoors
- Swimming
- Developed camping areas
- Visiting beaches
- Sightseeing
- Outdoor sports events and concerts
- Visiting nature centers and historic sites



Source: National Survey on Recreation and the Environment, 2000 (NSRE)

Growing Activities (cont.)

- Turf and court sports – soccer, football, handball, basketball
 - Canoeing, kayaking, rafting
 - Rock sports – mountain / rock climbing, bouldering, caving
 - Snow sports – ice skating, snowboarding,
 - Motor sports – Off-road driving, snowmobiling, personal watercraft
 - Others – golf, ride horses, fish, backpack, surf
- Source: NSRE Survey

Activity Implications

- Even activities with stable or slightly declining participation rates will grow in absolute numbers.
- Traditional activities still popular.
- New activities create demand: More users (more money) + More uses (more money) = More conflicts (more money)

Activity Implications (cont.)

Baby Boomers demand more amenity-rich experiences while many younger Californians are unfamiliar with traditional facilities/services. We're losing connection to major market segments.

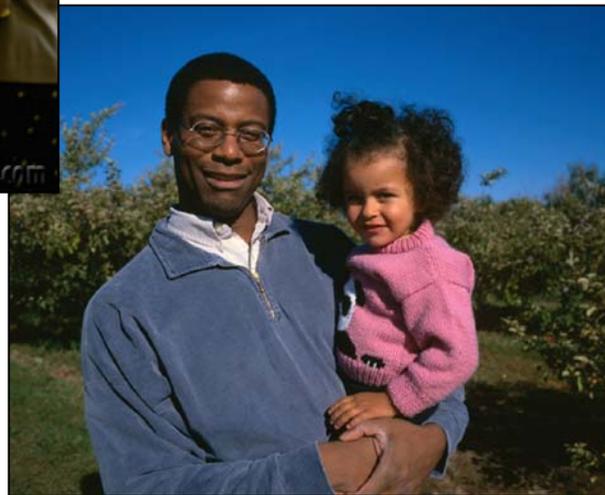


National Quick Facts of interest:

- The top five states participating in outdoor recreation included California. (Outdoor Industry Assn.)
- 75% of Americans use parks and recreation services. (Illinois Parks and Recreation)
- 57% of Americans participated in at least one outdoor activity. (Outdoor Industry Foundation)
- 39% participated in wildlife recreation activities. (U.S. Census)
- In 2001, over 29 million fishing licenses were sold; CA being one of the leading states. (American Sport Fishing Assn.)
- In 2003, 73.3 million people went hiking. (American Hiking Society)

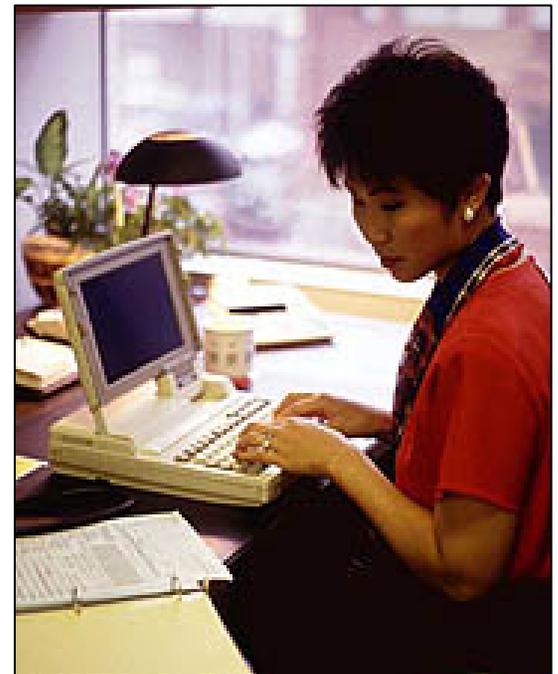
4. Changing Time Patterns

...so little time



Lack of time and work requirements were far the most common reasons given for why Californians are recreating less now than they were five years ago.

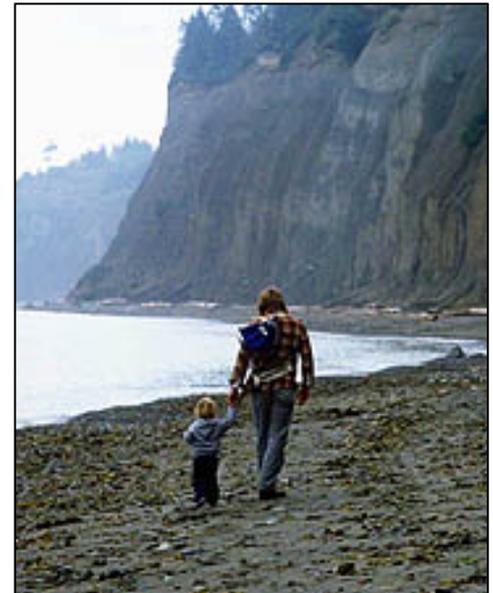
**Source: Public Opinions and Attitudes on
Outdoor Recreation in California – 2002,
Calif. State Parks**



Similarly...

- Over 90% of Californians feel that:

Being able to relax is either a **Very Important** or **Important** factor influencing their enjoyment of their favorite recreation activity.



More on Time...

- Americans continue to voluntarily give up more vacation than any other industrial nation.
- “Time-deepening” and “Activity Stacking” continue, though there are signs of resistance.
- Activities that can be accomplished in short, discreet blocks are preferred.



Implications to Changing Time Priorities

- As California continues to change its economy to information-based, the concept of work (place, time, etc.) will change.
- Retirees may, in fact, have less “leisure time.”



And...

- Flexible programs are needed.
- Sensitive to the need for stress relief.
- Greater concern for health issues.



5. Administrative Trends: Politics, Economics and Attitudes

- Concerns over the environment will continue to be in conflict with development for recreation uses.

Source: Public Opinions and Attitudes on Outdoor Recreation in CA, 2002

- Reduced public subsidies for arts and outdoor resources will open business opportunities and diversify programs for the public resources. Reliance on cost recovery will raise user fees for public provisions even further.

Source: Recreation Trends and Markets, The 21st Century

- Space scarcities will become more acute, especially in prime environments such as National Parks, urban facilities and museums. Source: Recreation Trends and Markets, The 21st Century
- People love parks and are generally satisfied with their condition. Source: Public Opinions and Attitudes on Outdoor Recreation in CA, 2002



- Parks lack top-of-the-mind status, especially historic parks.
- People are generally unwilling to pay through higher taxes, fees.

Source: Public Opinions and Attitudes on Outdoor Recreation in CA, 2002

- Deferred maintenance backlog continues to grow.

- Inability to add operations and/or maintenance staff and funding results in fewer acquisitions

Source: Public Opinions and Attitudes on Outdoor Recreation in CA, 2002

- Parks and Recreation not believed to be a job producing industry. Source: DPR Leader's Survey, 2002



- Creative use of Conservation Easements
- Jargon – using the right language
 - Do not say “open space”; say “natural areas”
 - Do not say “trails;” say “hiking, biking and walking trails”
 - Do use “poorly planned growth” rather than “unplanned growth” or “sprawl”
 - Do connect land conservation to “future generations”



Administrative Implications

...fast forward to 2030, the Congressional Budget Office issued a report saying, "...we're going to be able to afford four things in the federal budget: Medicare, Medicaid, Social Security and interest on the debt...it's a fiscal train wreck..."

David Osborne, Co-Author of Reinventing Government and The Price of Government, excerpt taken from a speech before the Commonwealth Club, June 25, 2004.

Massive Retirement Attrition

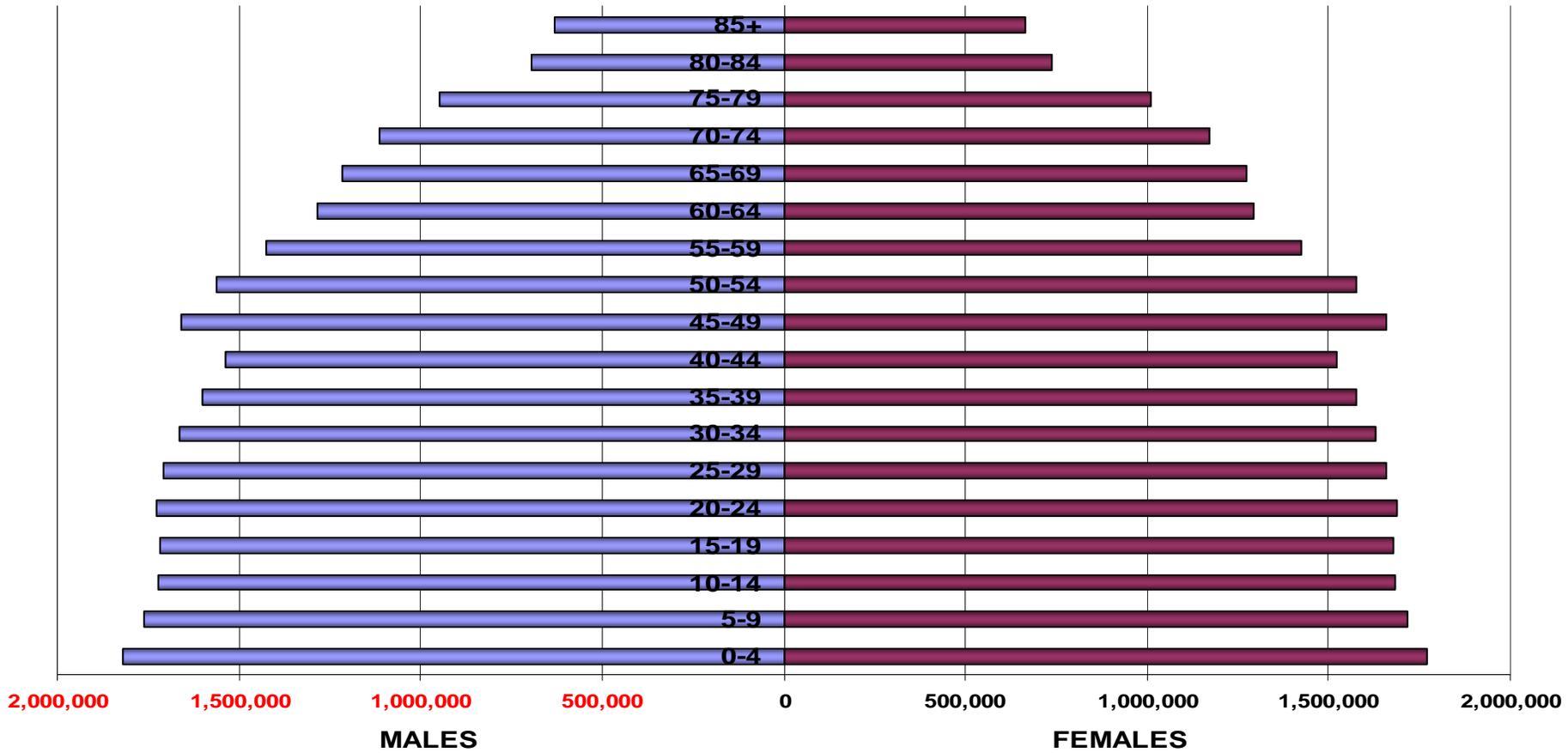
“A shrinking labor force will have to support an increasing number of people...All this means that we are facing our biggest present-day challenges: how to develop a sector that is better adapted to contemporary demands and conditions. And how can we continue to offer good services to citizen’s and businesses while skills, owing to retirement attrition, are disappearing?”

author unknown

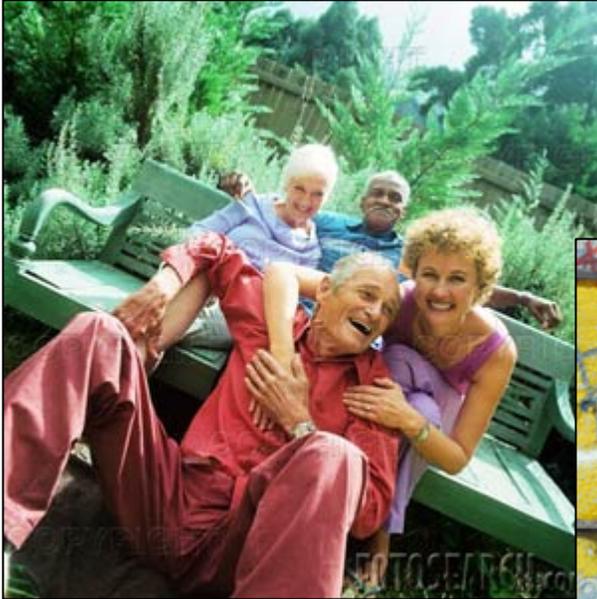
What Demands Do We Face?

2040

California Population 2040 (Source: CA Dept. of Finance)



Exercise Summary



California State Parks

Where to go for more information:

www.parks.ca.gov/planning

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