

## Appendix K: Industry Trends

A challenge for today's parks and recreation agency administrators is to continue to understand and respond to the changing characteristics of their communities. In this fast-paced society it is important to stay on top of current trends impacting parks and recreation. The following information highlights relevant local, regional, and national parks and recreational trends from various sources that may influence the North Clackamas Parks and Recreation District (NCPRD) over the next ten years.

### Active Transportation

The Center for Disease Control (CDC) has studied<sup>1</sup> the health implications of the current U.S. transportation infrastructure, which “focuses on motor vehicle travel and provides limited support for other transportation options for most Americans.” Several quality of life and health concerns emerge from the CDC's study.

- Physical activity and active transportation have declined compared to previous generations. The lack of physical activity is a major contributor to the steady rise in rates of obesity, diabetes, heart disease, stroke and other chronic health conditions in the United States.
- Motor vehicle crashes continue to be the leading cause of injury-related death for many age groups. Pedestrians and bicyclists are at an even greater risk of death from crashes than those who travel by motor vehicles.
- Many Americans view walking and bicycling within their communities as unsafe because of traffic and the lack of sidewalks or multi-modal paths, crosswalks, and bicycle dedicated lanes.
- Although using public transportation has historically been safer than highway travel in light duty vehicles, highway travel has grown more quickly than other modes of transportation.
- A lack of efficient alternatives to automobile travel disproportionately affects vulnerable populations such as the poor, the elderly, people who have disabilities and children by limiting access to jobs, health care, social interaction, and healthy food choices.
- Although motor vehicle emissions have decreased significantly over the past three decades, air pollution from motor vehicles continues to contribute to the degradation of our environment and adversely effects respiratory and cardiovascular health.
- Transportation accounts for approximately one-third of all U.S. greenhouse gas emissions that contribute to climate change.

As a result of these implications, communities around the country are creating programs to address and support alternative methods of transportation. Policy is being created, funding options are available, and partnerships are emerging. Initiatives like Safe Routes to Schools and Safe Routes to Play, and designing for “Complete Streets” are emerging to create safe, walkable communities.

## National Cycling Trends

Bicycle friendly cities have been emerging over the last ten years. Cycling has become a popular mode of transportation as people consider the rising cost of fuel, desire for better health, and concern for the environment. Some people also use cycling as a mode of transportation just for the fun of it.

The Alliance for Biking and Walking published *Bicycling and Walking in the United States 2012 Benchmark Report*. This report shows that increasing bicycling and walking are goals are clearly in the public interest. Where bicycling and walking levels are higher, obesity, high blood pressure, and diabetes levels are lower. Higher levels of bicycling and walking also coincide with increased bicycle and pedestrian safety and higher levels of physical activity. Increasing bicycling and walking can help solve many serious problems facing our nation.

According to the Alliance for Biking and Walking report, public health trends related to bicycling and walking include:

- Bicycling and walking levels fell 66 percent between 1960 and 2009, while obesity levels increased by 156 percent.
- Between 1966 and 2009, the number of children who bicycled or walked to school fell 75 percent, while the percentage of obese children rose 276 percent.
- In general, states with the highest levels of bicycling and walking have the lowest levels of obesity, hypertension (high blood pressure), and diabetes and have the greatest percentage of adults who meet the recommended 30-plus minutes per day of physical activity.

The economic benefits of bicycling and walking include:

- Bicycling and walking projects create 11-14 jobs per \$1 million spent, compared to just seven jobs created per \$1 million spent on highway projects.
- Cost benefit analyses show that up to \$11.80 in benefits can be gained for every \$1 invested in bicycling and walking.

National bicycling trends:

- Bike sharing and bike libraries allow people to rent bikes and tour communities using multiple pick up and drop off locations. Bike share communities rose from .4 percent to .6 percent between 1990 and 2009.
- Infrastructure to support biking communities is becoming more commonly funded in communities.
- The number of bike commuters in the United States rose by 64 percent from 1990 to 2009.
- Cycling participation by age almost doubled in the age group 25-64 from 23 percent in 1995 to 42 percent in 2009.

- Cycling is dominated by non-Hispanic whites, who make 79 percent of all bike trips in the USA but account for only 66 percent of the population (American Community Survey, 2009).
- The League of American Bicyclists currently has 490 applicants and has designated 190 communities in 46 states, up from 84 communities in 2008. The award recognizes education, engineering, enforcement, encouragement, and an evaluation plan.

### **Oregon Bicycle/Pedestrian Trails Trends**

Oregon ranks 3rd among states for bicycling safety and 19<sup>th</sup> for safe places to walk, according to a report by the Alliance for Biking & Walking. The “Bicycling and Walking in the U.S.: 2012 Benchmarking Report”<sup>ii</sup> ranks Portland 5<sup>th</sup> in bicycle safety and 11<sup>th</sup> in pedestrian safety. The League of American Bicyclists ranks Oregon #5 in Bike Friendly States.<sup>iii</sup> The league’s ratings are based on the following factors:

### **League of American Bicyclist’s Top 10 Signs of Success in a Bicycle Friendly State**

- People Commuting by Bike (More than 1 percent)
- Safe Passing/Vulnerable Road User Law
- Complete Streets Policy
- Dedicated State Funding
- Active State Advocacy Group
- State Bicycle Plan (Adopted 2002 or later)
- Share the Road Campaign
- Bicycle Education for Police
- Bicycle Safety Emphasis in Strategic Highway Safety Plan
- Top 10 State for Congestion Mitigation and Air Quality Spending
- Age-Related and Demographic National Trends

### **Aquatics**

According to the National Sporting Goods Association (NSGA), swimming ranked third in terms of participation in 2011, and fourth in 2010.

Nationally, there is an increasing trend towards indoor leisure and therapeutic pools. Additional indoor and outdoor amenities like “spray pads” are becoming increasingly popular as well.

## Athletic Recreation

The National Sporting Goods Association (NSGA) survey on sports participation in 2011<sup>iv</sup> found the top five athletic activities ranked by total participation included: exercise walking, exercising with equipment, swimming, camping, and aerobic exercising. Additionally, the following active, organized, or skill development activities remain popular: bicycle riding, hiking, running/jogging, basketball, golf, and soccer.

Sports with the greatest increase in participation over 2010 are kayaking (26.6% increase), cross country skiing (11.5% increase), and wrestling (9.4% increase). The biggest decreases in participation over 2010 were in power boating (17% decrease), off-road mountain biking (17.8% decrease), waterskiing (17.8% decrease), and In-line roller skating (18.4 % decrease). **Error! Reference source not found.** further outlines the top twenty sports ranked by total participation in 2011 and the percent change from 2010.

**Table 17: Top Twenty Sports Ranked by Total Participation in 2011**

Sport	Total	% Change*
Exercise Walking	97.1	1.3%
Exercising with Equipment	55.5	0.3%
Swimming	46.0	- 11.4%
Camping (vacation/overnight)	42.8	- 4.3%
Aerobic Exercising	42.0	8.9%
Bicycle Riding	39.1	- 1.6%
Hiking	39.1	3.8%
Running/Jogging	38.7	8.9%
Bowling	34.9	-10.6%
Workout at Club	34.5	- 4.8%
Weight Lifting	29.1	- 7.4%
Fishing (Freshwater)	28.0	- 6.5%

Basketball	26.1	- 2.9%
Yoga	21.6	6.9%
Golf	20.9	- 4.3%
Billiards/Pool	20.0	-16.9%
Target Shooting	19.6	- 1.2%
Boating, Motor/Power	16.7	- 17.0%
Hunting with Firearms	16.4	0.6%
Soccer	13.9	3.0%

*\*Percent Change is from participation in 2010*

*Source: NSGA 2012*

The Ten-year History of Sports Participation Report published by NSGA<sup>v</sup> shows national trends in team sports and individual sports. Overall participation trends indicate a general increase in 2011 for most team sports. However, softball and volleyball show a decrease in participation through 2011. Over the last decade individual sports have shown a dramatic increase.

**Error! Reference source not found.**<sup>18</sup> illustrates a ten year change in participation for selected activities including both team sports and individual sports.

**Table 18: Ten-Year History of Sports Participation (in millions) 2001-2011**

	2001	2003	2005	2007	2009	2011
Aerobic Exercising	24.3	28.0	33.7	34.8	33.2	42.0
Archery (Target)	4.7	3.9	6.8	6.6	7.1	6.3
Backpacking/Wilderness Camping	14.5	13.7	13.3	13.0	12.3	11.6
Baseball	14.9	14.6	14.6	14.0	11.5	12.3
Basketball	28.1	27.9	29.9	24.1	24.4	26.1
Bicycle Riding	39.0	36.3	43.1	37.4	38.1	39.1
Billiards/Pool	32.7	30.5	37.3	29.5	28.2	20.0
Boating, Motor/Power	22.6	24.2	27.5	31.9	24.0	16.7
Bowling	40.3	39.4	45.4	43.5	45.0	34.9
Camping	45.5	51.4	46.0	47.5	50.9	42.8
Dart Throwing	16.9	n/a	n/a	12.1	12.2	9.3
Exercise Walking	71.2	79.5	86.0	89.8	93.4	97.1
Exercising with Equipment	43.0	48.6	54.2	52.9	57.2	55.5
Fishing (Freshwater)	39.1	33.2	37.5	30.8	29.0	28.0
Fishing (Saltwater)	11.3	10.6	10.0	10.4	8.2	9.7
Football (tackle)	8.6	8.7	9.9	9.2	8.9	9.0
Golf	26.6	25.7	24.7	22.7	22.3	20.9
Hiking	26.1	25.0	29.8	28.6	34.0	39.1
Hockey (ice)	.2	1.8	2.4	2.1	3.1	3.0
Hunting w/Bow & Arrow	4.7	5.0	6.6	5.7	6.2	5.1
Hunting with Firearms	19.2	17.7	19.6	19.5	18.8	16.4
In-Line Roller Skating	19.2	16.0	13.1	10.7	7.9	6.1
Kayaking	3.5	4.7	7.6	5.9	4.9	7.1
Mountain Biking (off road)	6.3	8.2	9.2	9.3	8.4	6.0
Muzzleloading	3.0	3.1	4.1	3.6	3.8	3.1
Paintball Games	5.6	7.4	8.0	7.4	6.3	5.3
Running/Jogging	24.5	22.9	29.2	30.4	32.2	38.7
Skateboarding	9.6	9.0	12.0	10.1	8.4	6.6
Skiing (Alpine)	7.7	6.8	6.9	6.4	7.0	6.9
Skiing (Cross Country)	2.3	1.9	1.9	1.7	1.7	2.3
Snowboarding	5.3	6.3	6.0	5.1	6.2	5.1
Soccer	13.9	11.1	14.1	13.8	13.6	13.9
Softball	13.2	11.8	14.1	12.4	11.8	10.4
Swimming	54.8	47.0	58.0	52.3	50.2	46.0
Target Shooting	15.9	17.0	21.9	20.5	19.8	19.6
Target Shooting (Air gun)	2.9	3.8	6.7	6.6	5.2	5.3
Tennis	10.9	9.6	11.1	12.3	10.8	13.1
Volleyball	12.0	10.4	13.2	12.0	10.7	10.1
Water Skiing	5.5	5.5	6.7	5.3	5.2	4.3
Weight Lifting	21.2	25.9	35.5	33.2	34.5	29.1
Workout at Club	26.5	29.5	34.7	36.8	38.3	34.5
Wrestling	3.5	n/a	n/a	2.1	3.0	3.2

Note: Participated more than once (in millions), seven (7) years of age and older.

Source: NSGA 2012



## Youth Sports

Specific offerings for youth fitness are slowly increasing in health and fitness facilities. Facilities are offering more youth-specific exercise equipment. Individualized youth sports training opportunities are becoming more popular as well. In-line roller skating experienced the largest percentage decrease in participation.

For youth ages seven to 11 years, swimming and bicycle riding, followed by basketball had the **highest number of participants** in 2011; however for the same age group, muzzleloading, aerobic exercising, hunting with a bow and arrow, running/jogging, and tennis saw the **highest percent of increase** of the sports in the survey in 2011.

In 2009, an article in the Wall Street Journal observed that, in recent years **lacrosse has become one of the country's fastest growing team sports**. Participation in high school lacrosse has almost doubled this decade. An estimated 1.2 million Americans over age seven played lacrosse in 2009.<sup>vi</sup>

Another noteworthy trend is the increase in '**pick-up' play in team sports**.<sup>vii</sup> In recent years, the Sporting Goods Manufacturers Association (SGMA) noticed that participation in team sports has been driven by organized/sanctioned play. However, in 2008, there were seven team sports where 'casual/pick-up' play exceeded organized/sanctioned play. Those sports were basketball, ice hockey, field hockey, touch football, lacrosse, grass volleyball, and beach volleyball. It is believed that this is the result of athletes and their families feeling the pinch of the economy. Many people are choosing the less expensive ways to play sports and stay active.

## Demographic Trends in Recreation

### Adult – The Baby Boomers - Planning for the Demographic Shift

Baby boomers are defined as individuals born between 1946 and 1964; as stated in Leisure Programming for Baby Boomers<sup>viii</sup>. They are a generation that this generation consists of nearly 76 million Americans. In 2011, this influential population began their transition out of the workforce. As baby boomers enter retirement, they are looking for opportunities in fitness, sports, outdoors, arts and cultural events, and other activities that suit their lifestyles. With their varied life experiences, values, and expectations, baby boomers are predicted to redefine the meaning of recreation and leisure programming for mature adults.



Jeffrey Ziegler, a past president of the Arizona Parks and Recreation Association identified “Boomer Basics” in his article, *“Recreating retirement: how will baby boomers reshape leisure in their 60s?”*<sup>ix</sup> Highlights are summarized below.

**Boomer Basics:**

- Boomers are known to **work hard, play hard and spend hard.**
- They have always been **fixated with all things youthful.** Boomers typically respond that they feel 10 years younger than their chronological age.
- Their nostalgic mindset keeps boomers returning to the sights and sounds of their **1960s youth culture.**
- **Swimming pools** have become less of a social setting and much more of an extension of boomers' health and wellness program.
- Because boomers have, in general, a high education level, they'll likely continue to pursue **education** as adults and into retirement.

The NCPRD demographic profile indicates that 27.8 percent of the current population falls within the Baby Boomer age range (those approximately 45 – 64 years of age).

Boomers will look to parks and recreation professionals to give them the skills needed to enjoy many life-long interests and sports. **When programming for this age group, a customized experience to cater to their need for self-fulfillment, healthy pleasure, nostalgic youthfulness, and individual escapes will be important.** Recreation trends will shift away from games and activities that boomers associate with senior citizens. Ziegler suggests activities such as bingo, bridge, and shuffleboard will likely be avoided because boomers relate these activities to being old.

Boomers will reinvent what being a 65-year-old means. Parks and recreation agencies that don't plan for boomers carrying on in retirement with the same hectic pace they've lived during their years in employment will be left behind. Things to consider when planning for the demographic shift include;

- Boomer characteristics
- What drives Boomers?
- Marketing to Boomers
- Arts and Entertainment
- Passive and Active Fitness Trends



- Outdoor Recreation/Adventure Programs
- Travel Programs

## **Multiculturalism**

### **Multicultural Communities**

Our country is becoming increasingly racially and ethnically diverse. In May 2012, the U.S. Census Bureau announced that non-white babies now account for the majority of births in the United States.<sup>x</sup> "This is an important tipping point," said William H. Frey, the senior demographer at the Brookings Institution, describing the shift as a "transformation from a mostly white baby boomer culture to the more globalized multiethnic country that we are becoming." Cultural and ethnic diversity adds a unique flavor to communities expressed through distinct neighborhoods, multicultural learning environments, and restaurants, places of worship, museums, and nightlife.<sup>xi</sup>

As the recreation field continues to function within a more diverse society, race and ethnicity will become increasingly important in every aspect of the profession. More than ever, recreation professionals will be expected to work with, and have significant knowledge and understanding of, individuals from many cultural, racial, and ethnic backgrounds.

### **Multiculturalism and Marketing**

Today the marketplace for consumers has dramatically evolved in the United States from a largely Anglo demographic, to the reality that the United States has shifted to a large minority consumer base known as the "new majority." Minority Americans lead the way when it comes to mobile access. Nearly two-thirds of African-Americans (64%) and Latinos (63%) are wireless internet users, and minority Americans are significantly more likely to own a cell phone than are their white counterparts (87 percent of blacks and Hispanics own a cell phone, compared with 80 percent of whites).

The San Jose Group, a consortium of marketing communications companies specializing in reaching Hispanic and non-Hispanic markets of the United States, suggests that today's multicultural population of the United States, or the "new majority," is 107.6 million, which translates to about 35.1 percent of the country's total population. The United States' multicultural population alone could essentially be the 12<sup>th</sup> largest country in the world<sup>xii</sup>. Parks and recreation trends in marketing and providing leisure services continue to emerge and should be taken into consideration in all planning efforts.



## Economic & Health Benefits of Parks

There are numerous economic and health benefits of parks, including the following:

- Trails, parks, and playgrounds are among the five most important community amenities considered when selecting a home.
- Research from the University of Illinois shows that trees, parks, and green spaces have a profound impact on people's health and mental outlook.
- US Forest Service research indicates that when the economic benefits produced by trees are assessed, the total value can be two to six times the cost for tree planting and care.
- Fifty percent of Americans regard outdoor activities as their main source of exercise.

The Trust for Public Land has published a report titled: *"The Benefits of Parks: Why America Needs More County Parks and Open Space."* The report makes the following observations about the health, economic, environmental, and social benefits of parks and open space:

- Physical activity makes people healthier.
- Physical activity increases with access to parks.
- Contact with the natural world improves physical and physiological health.
- Residential and commercial property values increase.
- Value is added to community and economic development sustainability.
- Benefits of tourism are enhanced.
- Trees are effective in improving air quality and act as natural air conditioners.
- Trees assist with storm water control and erosion.
- Crime and juvenile delinquency are reduced.
- Recreational opportunities for all ages are provided.
- Stable neighborhoods and strong communities are created.

Researchers have long touted the benefits of outdoor exercise. According to a study published in the *Journal of Environmental Science and Technology* by the University of Essex in the United Kingdom, *"as little as five minutes of green exercise improves both mood and self-esteem."* A new trend emerging in parks and recreation aims to enable people to reap these benefits by working out on outdoor fitness equipment.

This trend started in China as they prepared to host the 2008 Summer Olympics. Their aim was to promote a society that promoted physical fitness. The United States is now catching up on this trend, as park and recreation departments have begun installing "outdoor gyms."



Equipment that can be found in these outdoor gyms is comparable to what would be found in an indoor workout facility, such as leg and chest presses, elliptical trainers, pull down trainers, etc. The equipment is fairly easy to install.

Outdoor fitness equipment provides a new opportunity for parks and recreation departments to increase the health of their communities, while offering them the opportunity to exercise outdoors. Such equipment can increase the usage of parks, trails, and other outdoor amenities while helping to fight the obesity epidemic and increase the community’s interaction with nature.

### Extreme Sports

Extreme sports are not just a fad. Regardless of the time of year, extreme sports are increasing in participation<sup>xiii</sup>. A 2008 Sporting Goods Manufacturing Association (SGMA) report shown in **Error! Reference source not found.**, demonstrates this increase in participation.

**Table 19: Most Popular Extreme Sports in the USA (U.S. population; 6 years of age or older)**

Extreme Sport	# of Participants (participated at least once in 2007)
1. Inline Skating	10,814,000
2. Skateboarding	8,429,000
3. Mountain Biking	6,892,000
4. Snowboarding	6,841,000
5. Paintball	5,476,000
6. Cardio Kickboxing	4,812,000
7. Climbing (Indoor, Sport, Boulder)	4,514,000
8. Trail Running	4,216,000
9. Ultimate Frisbee	4,038,000
10. Wakeboarding	3,521,000
11. Mountain/ Rock Climbing	2,062,000
12. BMX Bicycling	1,887,000



13. Roller Hockey	1,847,000
14. Boardsailing/Windsurfing	1,118,000

Source: *Sporting Goods Manufacturers Association, 2007*

In recent years, mountain biking, and BMX biking have continued their upward trend while inline skating and skateboarding have trended downward in popularity. Outside Recreation Participation Topline Report 2012.<sup>xiv</sup>

According to the NCPRD 2012 community survey, only 17 percent of the respondents felt a skateboard park was important to add in the future, while 51 percent felt it was not. And only three percent indicated that it was in their top first, second or third future facility priority to expand, add or improve.

## Facilities

According to *Recreation Management's* "2012 State of the Industry Report,"<sup>xv</sup> national trends show an increased user-base of recreation facilities. To meet that growing need, a majority of the survey respondents (60.1 percent) reported that they have plans to build new facilities or make additions or renovations to their existing facilities over the next three years. Nearly a quarter (23.9 percent) of respondents said they have plans to build new facilities, and just over a quarter (25.5 percent) said they plan to add to their existing facilities. Another 44.3 percent are planning renovations.

The current national trend is toward "one-stop" indoor recreation facilities to serve all ages. Large, multi-purpose regional centers help increase cost recovery, promote retention, and encourage cross-use. Multi-use facilities verses specialized space is a trend, offering programming opportunities as well as free-play opportunities. "One stop" facilities attract young families, teens, and adults of all ages.

Also according to the report, parks and recreation respondents said the average amount planned for construction for parks in the 2012 budgets saw an increase of 7.2 percent from an average of \$3,411,000 in last year's survey to an average of \$4,225,000 for 2012. There was very



little change in the types of features and amenities included in the facilities of the survey respondents from last year to this year. The most commonly found features include locker rooms (found in 59.6 percent of facilities), classrooms and meeting rooms (58.8 percent), bleachers and seating (57.5 percent), outdoor sports courts for basketball, tennis, etc. (55.7 percent) and concession areas (54.9 percent).

## Fitness Programming

There have been many changes in fitness programs in the last ten years. What clients wanted in 2000 is not necessarily what they want today. The American College of Sports Medicine’s (ACSM’s) *Health and Fitness Journal*<sup>xvi</sup> has conducted an annual worldwide survey since 2007 to determine trends that would help create a standard for health and fitness programming. *Table 20* shows survey results that focus on trends in the commercial, corporate, clinical, and community health and fitness industry. The Worldwide Survey indicates the following shift in fitness trends from 2006 to 2011. Stability ball, Pilates and balance training dropped out of the survey while Zumba and outdoor activities appear in the top 20 for the first time.

**Table 20: Worldwide Fitness Trends for 2007 and 2012**

2007	2012
1.Children and obesity	1. Educated and experienced fitness professionals
2.Special fitness programs for older adults	2. Strength training
3.Educated and experienced fitness professionals	3. Fitness programs for older adults
4. Functional fitness	4. Exercise and weight loss
5. Core training	5 Children and obesity
6 Strength training	6. Personal training
7. Personal training	7. Core training
8. Mind/Body Exercise	8. Group personal training
9 Exercise and weight loss	9. Zumba and other dance workouts
10. Outcome measurements	10. Functional fitness



Source: American College of Sport Medicine

## General Parks and Recreation Programming

One of the most common concerns in the recreation industry is creating innovative programming to draw participants into facilities and services. According to *Recreation Management's* "2012 State of the Industry Report,"<sup>xvii</sup> the most popular programs, offered by more than half of survey respondents, include holiday events and other special events (78.5 %), youth sports teams (70%), day camps and summer camps (66.7%), arts and crafts (63.3%), educational programs (62.8), adult sports teams (62.1 %), programs for active older adults, (57.1%), sports tournaments and races (57 %), and festivals and concerts (55.2 %).

The report also suggested slightly more than a third (36.3 %) of respondents indicated that they are planning to add additional programs at their facilities over the next three years. The most common types of programming they are planning to add include:

1. Environmental education (up from No. 2 on 2011 survey)
2. Teen programming (down from No. 1)
3. Fitness programs (no change)
4. Active older adults programs (no change)
5. Educational programs (up from No. 6)
6. Mind-body/balance programs – yoga, tai chi, Pilates or martial arts (down from No. 5)
7. Holiday events and other special events (no change)
8. Adult sports teams (up from No. 10)
9. Performing arts – dance, theater and music (down from No. 8)
10. Day camps and summer camps (not on 2011 list of top 10 planned programs)

## Health and Obesity

According to the *Center for Disease Control (CDC)*, obesity continues to be a serious issue in America, growing at an epidemic rate – almost tripling since 1990. Overall, more than one-third (35.7%) of adults and 17 percent of children in the United States are obese.<sup>xviii</sup> These statistics illustrate the importance of intercepting the epidemic in youth.



In an effort to educate Americans and encourage them to take steps toward a healthier future, the *United Health Foundation* annually presents *America's Health Rankings®: A Call to Action for Individuals & Their Communities*<sup>xix</sup>

America's Health Rankings has tracked the health of the nation for the past 22 years, providing a unique, comprehensive perspective on how the nation - and each state - measures up. The 2011 edition of the Rankings suggests our nation is extremely adept at treating illness and disease. However, Americans are struggling to change unhealthy behaviors such as smoking and obesity, which cause many of these diseases. Obesity continues to be one of the fastest growing health issues in our nation, and America is spending billions in direct health care costs associated with poor diet and physical inactivity.

#### **Economic Effects of Inactivity and Obesity**

Inactivity and obesity in the United States cost the country hundreds of billions of dollars annually. Some local governments are now accepting the role of providing preventative health care through park and recreation services.

As obesity in the United States continues to be a topic of interest for legislators and our government, there continues to be research suggesting that activity levels are stagnant among all age groups. The following are statistics that support this concern.

- Only 25 percent of adults and 27 percent of youth (grades 9-12) engage in recommended levels of physical activity.
- 59 percent of American adults are sedentary.
- Children born now have a lower life expectancy than their parents.
- Children nationally spend 4.5 - 8 hours daily (30-56 hours per week) in front of a screen (television and/or computer).

#### ***Obesity among Children and Adolescents***

*“Obesity now affects 17 percent of all children and adolescents in the United States. The percentage of adolescents and children who are obese tripled from 1980 to 2008. In 2008 alone, more than one third of U.S. children and adolescents were overweight or obese.*

*Obese children are more likely to become obese adults.*



## Local Trends

The United Health Foundation (UHF) ranked Oregon 14<sup>th</sup> in 2011<sup>xx</sup>, unchanged from 2010. According to the UHF 2011 report, Oregon's strengths and weaknesses are as follows:

### Strengths:

- Low prevalence of smoking
- Low rate of preventable hospitalizations
- Low levels of air pollution

### Challenges:

- High rate of uninsured population
- Low per capita public health funding
- High percentage of children in poverty

## Other Highlights

In the past year, obesity increased from 23.6 percent to 27.6 percent of adults, with more than 818,000 obese adults in the state.

In the past five years, diabetes increased from 6.7 percent to 7.2 percent of adults. Now 213,000 Oregon adults have diabetes.

In the past year, the rate of preventable hospitalizations decreased from 46.1 to 42.0 discharges per 1,000 Medicare enrollees.

For a more detailed look at this data, visit [www.americashealthrankings.org](http://www.americashealthrankings.org).

## Healthy Lifestyle

### National Trends

In October, 2010 the Robert Wood Johnson Foundation's *Vulnerable Populations Portfolio* <sup>xxi</sup> shared thoughts on how health is impacted by where and how we live, learn, work, and play. Below demonstrates the connection that nonmedical factors play in where health starts before illness sets in.



## Where We Play

Play is a profound biological process that shapes brain function.

- Play prompts us to be continually, joyously, physically active, combating obesity and enhancing overall health and well-being.
- Play can interrupt the damage done by chronic stress, and even gives the immune system some relief.
- Play is a basic need; a biological requirement for normal growth and development. Scientists associated with the National Institute for Play are united in their concern about “play under-nutrition,” noting that the corrosive effects of this form of starvation gradually erode emotional, cognitive and physiologic well-being – a major aspect of sedentary, obesity, and poor stress management can be readily linked to play starvation.
- Providing places to spend leisure time and recreate are critical to creating healthy communities.

## **Additional National Healthy Lifestyle Trends**

The population is becoming more diverse. **As demographics are experiencing an age and ethnic shift**, so too are landscapes, daily lifestyles and habits changing. The number of adults over the age of 65 has increased, lifestyle changes have encouraged less physical activity; collectively these trends have created profound implications for the way local governments conduct business. Below are examples of trends and government responses.

- According to the article “Outdoor Exercise ‘Healthier than Gym Workouts,’” published in March 2011, researchers found that going for a run outdoors is better than exercising in the gym because it has a positive impact on mental, as well as physical health. Levels of tension, confusion, anger, and depression were found to be lowered. This aligns with the trend of adult fitness playgrounds that are popping up all over the world.
- Café Plus Concepts – Mather’s Cafes are opening around the country to attract Boomers and seniors. The concept is more than a café. The “plus” offers leisure activities, trips/tours, educational offerings, social opportunities, and fitness. These concepts can be integrated into community centers or stand alone facilities.
- Essential services, healthy food options, workplaces, and other destinations are frequently not located within easy walking or bicycling distance from where people live, work, learn, and play.



- The link between health and the built environment continues to grow as a trend for local governments. They are increasingly incorporating active living and physical activity into daily routines.

## Natural Environments and Open Space

### Conservation

The top ten recommendations of the National Recreation and Parks Association (NRPA) Conservation Task Force were published in the November 2011 issue of Parks and Recreation Magazine<sup>xxii</sup>. They are:

- 1) Take a leadership role in the community to promote conservation.
- 2) Lead by example in employing best management conservation practices in parks.
- 3) Engage volunteers in conservation and stewardship.
- 4) Establish a strategic land acquisition strategy based on knowledge and awareness of significant natural and cultural resources (watershed protection, unique ecological characteristics, and sensitive natural areas deserving protection).
- 5) Engage youth in conservation.
- 6) Conserve energy in all ways.
- 7) Protect natural resources in parks and in the community.
- 8) Create sustainable landscapes that demonstrate principles of conservation.
- 9) Forge partnerships that foster the mission of conservation.
- 10) Utilize technology to promote conservation.

### Nature Programming

Park districts have been seeing an increase in interest in environmental-oriented “back to nature” programs. In 2007, the National Recreation and Parks Association (NRPA) sent out a survey to member agencies in order to learn more about the programs and facilities that public park and recreation agencies provide to connect children and their families with nature.<sup>xxiii</sup> A summary of the results follow:

- Sixty-eight percent of public parks and recreation agencies offer nature-based programming and 61% have nature-based facilities.
- The most common programs include nature hikes, nature-oriented arts and crafts, fishing-related events, and nature-based education in cooperation with local schools.
- When asked to describe the elements that directly contribute to their most successful programs, agencies listed staff training as most important followed by program content and number of staff/staff training.



- When asked what resources would be needed most to expand programming, additional staff was most important followed by funding.
- Of the agencies that do not currently offer nature-based programming, 90 percent indicated that they want to in the future. Additional staff and funding were again the most important resources these agencies would need going forward.
- The most common facilities include: nature parks/preserves, self-guided nature trails, outdoor classrooms, and nature centers.
- When asked to describe the elements that directly contribute to their most successful facilities, agencies listed funding as most important followed by presence of wildlife and community support.

In his book Last Child in the Woods: Saving Children from Nature Deficit Disorder<sup>xxiv</sup>, Richard Louv introduced the concept of the restorative nature for both children and adults of being out in nature. This concept, and research in support of it, has led to a growing movement promoting connections with nature in daily life. One manifestation of this is the development of Nature Explore Classrooms in parks. Nature Explore<sup>xxv</sup> is a collaborative program of the Arbor Day Foundation and the non-profit organization, Dimensions Educational Research Foundation, with a mission of helping children and families develop a profound engagement with the natural world, where nature is an integral, joyful part of children's daily learning.

## Outdoor Recreation

Local parks and recreation departments are a common place for residents to look when getting outside for recreational activities. It is often the mission of parks departments as well as private or non-profits to get more people outdoors.

The 2012 Outdoor Foundation "Participation in Outdoor Recreation" report<sup>xxvi</sup> annually shows that, while there continues to be fallout from the recent economic downturn, outdoor recreation reached the highest participation level in five years, in 2011. The Outdoor Foundation's research brought the following key findings.

### General Participation in Outdoor Recreation

- **Return to Nature:** Nearly 50% of Americans ages six and older participated in outdoor recreation in 2011. That is a slight increase from 2010 and equates to a total of 141.1 million Americans.
- **Accessibility is Important Factor:** Activities that are affordable and accessible (Gateway Activities) have a contagious effect. 87% of hikers participate in one or more other



activities. **People with biking routes near their home get outdoors at a rate of 58% compared to a rate of 47% for those without easy access to biking routes.**

## Youth Participation

- **Downward Trend Reversed:** For the first time since 2006, the downward trend of participation in outdoor sports among young boys has reversed to the upward direction. Female teenager participation has grown to the highest rate recorded in the Outdoor Foundation's annual reports.
- **Physical education in schools:** The importance cannot be understated. Among adults ages 18 and older who are current outdoor participants, 82% say they had PE in school between the ages of 6 and 12.

The Outdoor Foundation reports that the top outdoor activities in 2011 were running, fishing, bicycling, camping, and hiking. Bird watching is also among the favorite outdoor activities by frequency of participation.

Outdoor recreation trends are also a recurring topic of study by the United States Forest Service through the Internet Research Information Series (IRIS). An IRIS report dated January 2012<sup>xxvii</sup> provides the following recent nature-based outdoor recreation trends: Participation in walking for pleasure and family gatherings outdoors were the two most popular activities for the U.S. population as a whole in. These outdoor activities were followed closely in popularity by viewing/ photographing wildlife, boating, fishing, snow/ice activities, and swimming. There has been a growing momentum in participation in sightseeing, birding and wildlife watching in recent years.

The 2012 NCPRD Community Survey indicated that the most frequently attended program within NCPRD, at 5.7 times on average over the past 12 months, is youth sports. Swimming programs (4.0 times), adult outdoor recreation (3.6 times), youth outdoor recreation (3.5 times), and fitness and wellness programs (3.4 times) follow closely behind.



## Role and Response of Local Government

Collectively, these trends have created profound implications for the way local governments conduct business. Some local governments are now accepting the role of providing preventative health care through parks and recreation services. The following are concepts are from the International County/County Management Association<sup>xxviii</sup>.

- Parks & Recreation departments should take the lead in developing communities conducive to active living.
- There is growing support for recreation programs that encourage active living within their community.
- One of the highest priorities is a cohesive system of parks and trails and accessible neighborhood parks.

In summary, the United States of America, its states, and its communities share the enormous task of reducing the health and economic burden of obesity. While numerous programs, policies, and products have been designed to address the problem, there is no magic bullet to make it go away. The role of public parks and recreation as a health promotion and prevention agency has come of age. What matters is refocusing our efforts to insure the health, well-being, and economic prosperity of our communities and its citizens.

### Administration Trends for Recreation and Parks

Municipal parks and recreation structures and delivery systems have changed, and more alternative methods of delivering services are emerging. Certain services are being contracted out and cooperative agreements with non-profit groups and other public institutions are being developed. Newer partners include the health system, social services, justice system, education, the corporate sector, and community service agencies. These partnerships reflect both a broader interpretation of the mandate of parks and recreation agencies and the increased willingness of other sectors to work together to address community issues. The relationship with health agencies is vital in promoting wellness. The traditional relationship with education and the sharing of facilities through joint-use agreements is evolving into cooperative planning and programming aimed at addressing youth inactivity levels and community needs.

Listed below are additional administrative national trends:

- Level of subsidy for programs is lessening and more “enterprise” activities are being developed, thereby allowing subsidy to be used where deemed appropriate.



- Information technology allows for better tracking and reporting.
- Pricing is often determined by peak, off-peak, and off-season rates.
- More agencies are partnering with private, public, and non-profit groups.

### Funding

According to Recreation Management Magazine's, "2011 State of the Industry Report," from fiscal year 2010 to fiscal year 2012, the largest increases in operating budgets are expected among community centers, where State of the Industry survey respondents are expecting a 12.4 percent increase to operating expenditures, and among camps at 11 percent

### Marketing

Niche marketing trends have experienced change more frequently than ever before as technology affects the way the public receives information. Web 2.0 tools and now Web 3.0 tools are a trend for agencies to use as a means of marketing programs and services. Popular social marketing electronic tools include:

- Facebook
- Whirl
- Twitter
- You Tube
- Tagged
- LinkedIn

Mobile marketing is a trend of the future. Young adults engage in mobile data applications at much higher rates than adults in age brackets 30 and older. Usage rates of mobile applications demonstrate chronologically across four major age cohorts, that Millennials tend to get information more frequently using mobile devices such as smart phones. For example, 95 percent of 18-to-29-year-old cell phone owners send and receive text messages, compared to 82 percent of 30-to-49-year-olds, 57 percent of 50-to-64-year-olds, and 19 percent of 65 and older.

### Agency Accreditation

Parks and Recreation agencies are affirming their competencies and value through accreditation. This is achieved by an agency's commitment to 150 standards.



There are currently 102 agencies around the nation that have received the **Commission for Accreditation of Parks and Recreation Agencies (CAPRA) accreditation. In Oregon, only the Cities of Hillsboro and Medford holds this distinction.**

**Additional benefits of CAPRA accreditation include:**

- Boosts staff morale
- Encourages collaboration
- Improves program outcomes
- Identifies agency and cost efficiencies
- Builds high level of trust with the public
- Demonstrates promise of quality
- Identifies best management practices

**Americans with Disabilities Act (ADA) – Compliance**

On September 14, 2010 the U.S. Department of Justice (DOJ) issued an amended regulation implementing the Americans with Disabilities Act (ADA 2010 Standards). On March 15, 2011 the amended Act became effective and, for the first time in history, includes recreation environment design requirements. Compliance of the regulations was to be effective March 15, 2012. This includes design and construction requirements and the development of three-year transition plan. By March 15, 2015 implementation of the three-year transition plan must be complete.

**The Role of the ADA**

How a community interprets and implements the guidelines of the ADA regarding parks and recreation programs and services for children, youth, and adults with disabilities ultimately depends upon the philosophy of staff and how accepting they are of people with disabilities. Some organizations provide a basic level of service as per the law and other communities embrace the notion of accessibility and choose to exceed what is expected.

Community therapeutic recreation programs must address the needs of all people with disabilities. Disabilities may include autism, developmental, physical, learning, visual impairments, hearing impairments, mental health and more. Community therapeutic recreation programs should also serve children, youth, and adults of all ages.

The types of programs offered by a community therapeutic recreation program may include specialized, inclusive, and unified programs. Specialized recreation programs generally serve



the needs specifically for someone with a disability. A “Learn to Swim” program for children with autism or an exercise program for adults with arthritis are just two examples of specialized programs. An inclusive program is one in which a person with a disability chooses to participate in a regular recreation program with a reasonable accommodation, alongside typical peers who do not have a disability. A third type of program is a unified program. This program is for individuals with and without disabilities who participate together as a “buddy”, or are paired or matched -- able-body with disabled. Many Special Olympic programs are offered as unified programs.

## Therapeutic Recreation

*Across the nation, the current financial condition has put constraints on community recreation programs. Staff are cutting budgets, yet also trying to determine how to provide recreation services to people with disabilities.*

Nationally, therapeutic recreation as a service is experiencing many struggles and challenges. The changing face of health care is having a dramatic effect on therapeutic recreation (TR) services in many rehabilitation settings and specifically in physical rehabilitation settings, thus affecting community recreation programs.

A secondary issue caused by the decreased rehabilitation stay is the need for a clinical facility to promote community reintegration. In the past, clinical facilities provided programs such as wheelchair basketball, but due to the reduction of expenditures, facilities no longer provide such services and expect communities to address these needs.

The fundamental goal of TR services is to enable participants to return successfully to their communities. This not only means they need to have the functional skill but also that they have physical and social environments in the community that are receptive to the individual.

Another trend is the renewed focus on serving people with psychiatric disabilities. In 2004, The National Council on Disability (NCD) issued a comprehensive report, *Livable Communities for Adults with Disabilities*. This report identified six elements for improving the quality of life for all citizens, including children, youth and adults- with disabilities. The six elements are:

1. Provides affordable, appropriate, accessible housing
2. Ensures accessible, affordable, reliable, safe transportation
3. Adjusts the physical environment for inclusiveness and accessibility
4. Provides work, volunteer, and education opportunities



5. Ensures access to key health and support services
6. Encourages participation in civic, cultural, social, and recreational activities

The right to enjoy services and programs offered to all members by both public and private entities is the essence of the elements. Unlike persons with physical disabilities, people with psychiatric disabilities face attitudinal barriers of those around them. Attitudinal barriers are exemplified by policies, programs, and beliefs about psychiatric disabilities. Fortunately, the mental health system is moving toward a model based on recovery. This model believes that everyone with a mental health diagnosis is able and capable of living independently within the community with supports.

### **Trend Analysis Summary**

The following key industry and national behavioral trends are relevant to the NCPRD. These will be important to evaluate for future planning efforts and include the following:

- Active transportation programs, policy, and funding are getting recognition in communities across the Country.
- There is an increasing trend towards indoor leisure and therapeutic pools. Additional amenities like “spray pads” are becoming increasingly popular as well.
- The top five athletic activities ranked by total participation included: exercise walking, exercising with equipment, swimming, camping, and aerobic exercising.
- The United Health Foundation has ranked Oregon 14th in its 2011 State Health Rankings.
- Therapeutic recreation programs and inclusion services are considered an important trend when planning for the future.
- Fitness programs, educational programs, teen programs, mind body balance and active adults are the top five programs parks and recreation departments are planning to add within the next three years.
- The most common programs offered in communities are holiday events and other special events, fitness programs, educational programs, day camps and summer camps; mind-body/balance programs such as yoga, tai chi, Pilates and martial arts; and youth sports teams.



- Trails, parks, and playgrounds are among the five most important community amenities considered when selecting a home.
- National trend in the delivery of parks and recreation systems reflects more partnerships and contractual agreements to support specialized services.
- The majority of Americans agree that preserving undeveloped land for outdoor recreation is important. A large percentage of outdoor participants also believe that developing local parks and hiking and walking trails is important and that there should be more outdoor education and activities during the school day.
- Parks and recreation administration trends include increased partnerships, agency accreditation, and enterprising budgets.
- Web-based niche marketing tools are gaining popularity for agencies to use as a means of marketing programs and services.
- March 15, 2012 was the deadline for ADA transition plans must be in place with organizations to demonstrate compliance to the amended regulations.

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<sup>ii</sup>“Bicycling and Walking in the United States, 2012 Benchmarking Report”, Alliance for Biking and Walking, Washington, D.C. 2012 <<http://www.PeoplePoweredMovement.org>>.

<sup>iii</sup>League of American Bicyclists, 2012 Oregon State Ranking, <[http://www.bikeleague.org/programs/bicyclefriendlyamerica/bicyclefriendlystate/bfs\\_report\\_cards/oregon.pdf](http://www.bikeleague.org/programs/bicyclefriendlyamerica/bicyclefriendlystate/bfs_report_cards/oregon.pdf)>, accessed on September 20, 2012.

<sup>iv</sup> 2011 Participation – Ranked by Total Participation”, National Sporting Goods Association, 2012, <<http://www.nsga.org/i4a/pages/index.cfm?pageid=3346>>.

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<sup>vi</sup> Evans and Trachtenberg, “Lacrosse Muscles It’s Way West,” *Wall Street Journal*, May, 2009.

<sup>vii</sup> Eddie Pells, “Americans’ Pick-Up Games Help Escape Rough Times, Lubbock Avalanche-Journal, August 1, 2009, < [http://lubbockonline.com/stories/080109/spo\\_473466604.shtml](http://lubbockonline.com/stories/080109/spo_473466604.shtml)>, accessed September 20, 2012.

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