

Trends Worth Talking About

**California Park & Recreation Society
Annual Conference, March 2006**

Planning Division
California State Parks
Stuart Hong, Alex Stehl & Laura Westrup

www.parks.ca.gov/planning

916 653-9901



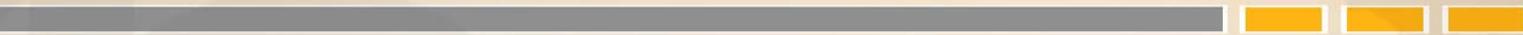
Presentation Goals:

To help park service providers stay relevant about California's:

- Demographic trends and the effect on our profession
- Outdoor recreation activities most desired
- Health and the use of leisure and work time
- How “convenience” is affecting our profession
- Implications of technology on equipment and services
- Additional trends to watch



Resources:



- **CPRS, *Trendscan, 2005-2006***
 - **BLM 2005, Recreation Planning Presentation**
 - **CA State Parks, *Park and Recreation Trends in California, 2005***
 - **CA State Parks, *Health and Social Benefits of Recreation, 2005***
 - **Outdoor Industry Association Survey, 2004**
 - **CA State Parks, *Public Opinions & Attitudes on Outdoor Recreation in California, 2002***
 - ***National Survey on Recreation and the Environment, 2000***
 - **CA Department of Finance/ U.S. Census Bureau, 2006**
 - **Various media articles cited**
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Setting the tone for this presentation

Seems like everything is prepackaged, preprogrammed – all we need to do is add **YOU!**

Americans:

- **Work longer hours now than 1950s; many cases, overtime is mandatory**
- **Work longer hours than employees in other industrial countries**
- **Average over 2 weeks of vacation time**
- **Europeans average 5-6 weeks each year**

Source: Park and Recreation Trends in California,
September 2005

What does it mean?

We are a nation of *overworked, overscheduled, overstressed, and overwhelmed* employees

Stress leads to:

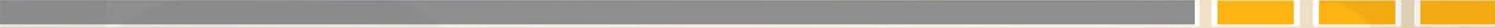
- Reduced time for physical activity
- Job burnout
- Fatigue, accidents and injuries
- Increased consumption of high-fat, high sugar foods
- Reduced time to care for children and aging parents
- Little or no time for self-development and volunteering in our communities

Source: Park and Recreation Trends in California,
September 2005

Eight overarching social trends woven throughout this presentation:

1. Convenience – anything to save time
2. Health – heightened emphasis on improving health
3. Age complexity – adults acting youthful; youth making spending choices
4. Gender complexity – blurred traditional values, attitudes, preferences and behaviors

Source: Park and Recreation Trends in California,
January 2006

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5. Lifestage complexity – single seniors, extended life as an adults, children raised in families of all ages
 6. Income complexity – lower and middle income people living more luxuriously
 7. Individualism – increasing number of people with single status (more self gratification)
 8. Comfort and convenience – more enjoying self indulgences to escape pressures of everyday life

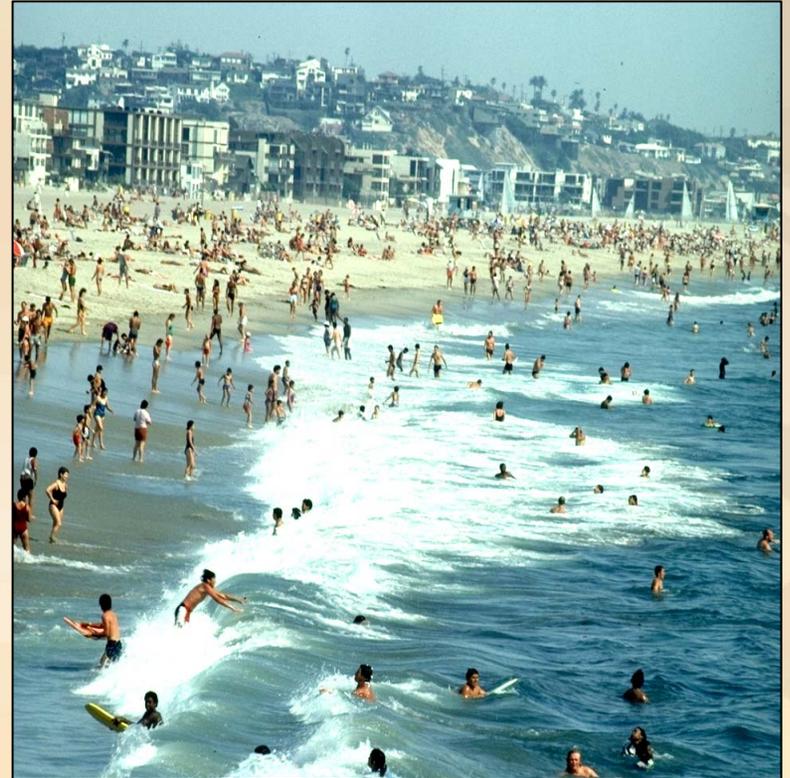
Source: Park and Recreation Trends in California, January 2006

Exercise – 15 minutes

How are these societal trends impacting your agency's ability to provide recreation services, facilities, programs and activities?

1. Convenience
2. Health
3. Age complexity
4. Gender complexity
5. Lifestage complexity
6. Income complexity
7. Individualism
8. Comfort

1. Explosive growth, significant population shifts and migration



More on growth

- 500,000+ Californians added each year; 37 million residents today; will exceed 50 million by 2040
- 1 in 8 U.S. citizens lives in California
- 80% of population is in coastal communities; Central Valley is fastest growth region
- Residents are increasingly more mobile (moving frequently, buying second homes, changing jobs, etc.)

“The baby boom is producing more than a baby a minute...Population growth increases demand for housing, **parks**, water transportation, schools and other forms of public infrastructure.”

Dan Walters, Sacramento Bee, March 3, 2006

Source: Park and Recreation Trends in California 2005
CA Department of Finance/U.S. Census Bureau

Growing older...

- By 2010, 1 in 5 will be older than 60
- Senior population will double by 2020
- Baby boomers near “senior” status (retiring) leaving more time for leisure pursuits
- Lifestyle improved for older Americans – they are expecting and demanding more out of their leisure time
Generally, more affluent than previous generations



Source: Park and Recreation Trends in California 2005
CA Department of Finance/U.S. Census Bureau

And Growing younger...

- Almost 40% of households include children under 18
- 3/4 of California's K-12 students live in 10 of 58 counties
- Younger Californians are more ethnically and culturally diverse and are more technologically advanced and demanding of services, programs and opportunities



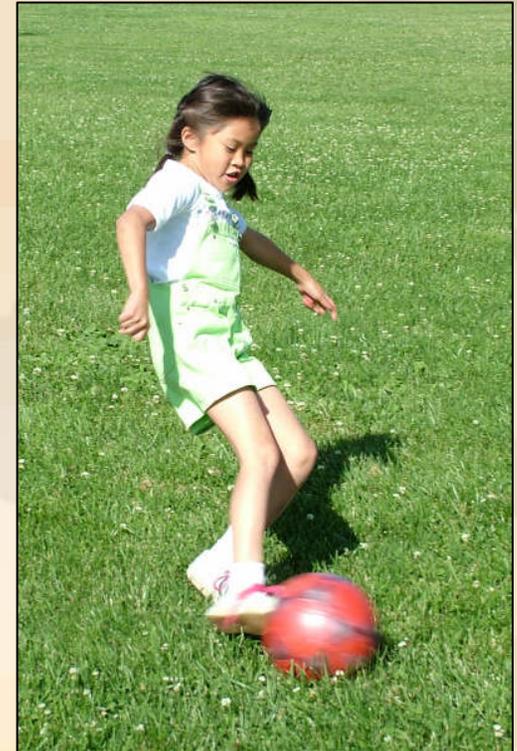
Source: Park and Recreation Trends in California 2005
CA Department of Finance/U.S. Census Bureau

Just for Fun...

How hip are you? Are you keeping up with the latest slang?

Changing slang in our midst...

- | | |
|------------------|-----------------|
| 1. Amped | 11. Kicks |
| 2. Cheddar | 12. 411 |
| 3. Dawg | 13. Bling-bling |
| 4. Dillweed | 14. Peace out |
| 5. Drop the dime | 15. Popo |
| 6. Flossin' | |
| 7. Marinate | |
| 8. On your jock | |
| 9. Props | |
| 10. Whip | |



Source: Trendscan, April 2005;
Planning Division

How did you do???

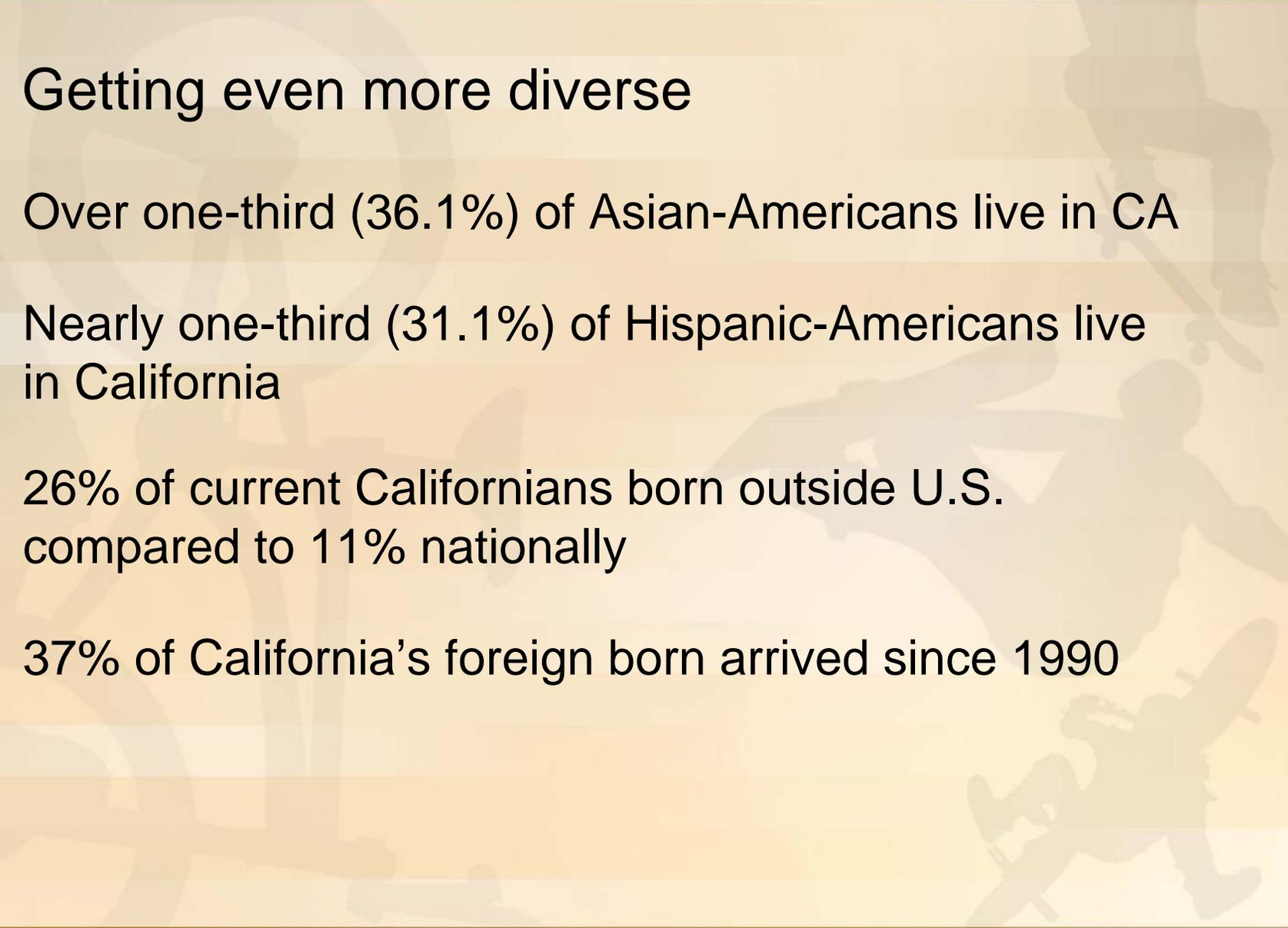
1. Amped – jazzed up with frenetic activity
2. Cheddar – money
3. Dawg – friend
4. Dillweed – social incompetent, dork
5. Drop the dime – tell on someone
6. Flossin' – showing off wealth, belongings, dressing up
7. Marinate – chillin'
8. On your jock – obsessed with guy or girl
9. Props – compliments
10. Whip – wheels (cars)
11. Kicks – shoes
12. 411 – Information
13. Bling-bling – flashy jewelry
14. Peace out – goodbye
15. Popo – Police

Source: Trendscan, April 2005

California tomorrow (snapshot):

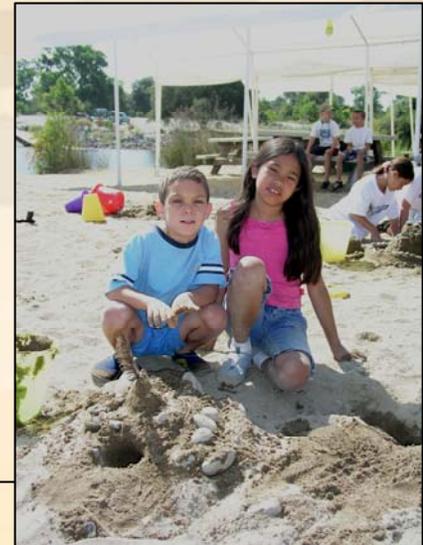


Getting even more diverse

- Over one-third (36.1%) of Asian-Americans live in CA
 - Nearly one-third (31.1%) of Hispanic-Americans live in California
 - 26% of current Californians born outside U.S. compared to 11% nationally
 - 37% of California's foreign born arrived since 1990
- 

Nationally, California is home to:

- 29% - Pacific Islanders
- 24% - “Two or More” races
- 14% - American Natives/Alaska Natives
- 10% - Caucasians
- 7% - African Americans
- 36% - Asian Americans
- 31% - Hispanics/Latinos



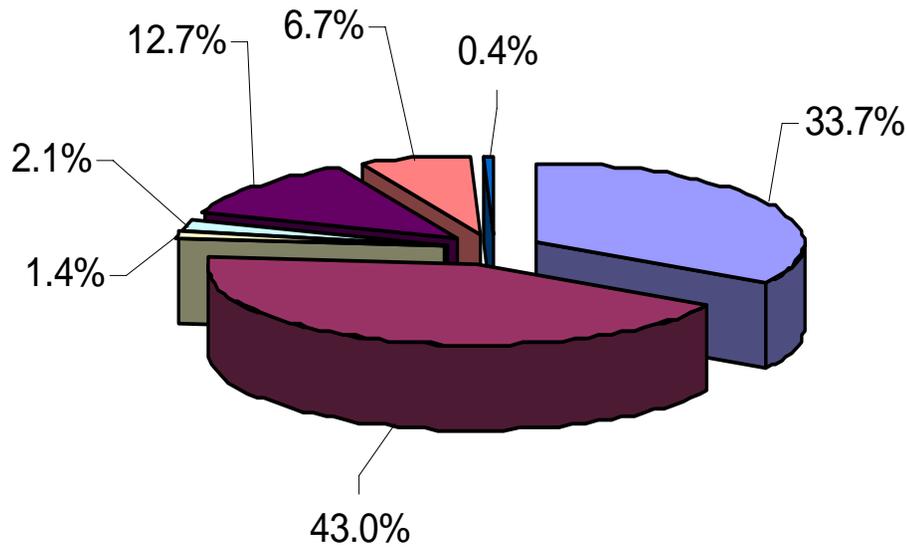
California through 2020 and beyond

Ethnic groups projected to increase between 2000 & 2020:

- **58% more Hispanics**
- **55% more Asian/Pacific Islanders**
- **29% more Native Americans**
- **20% more African Americans**
- **4% less of persons of European descent**

California Population by 2020

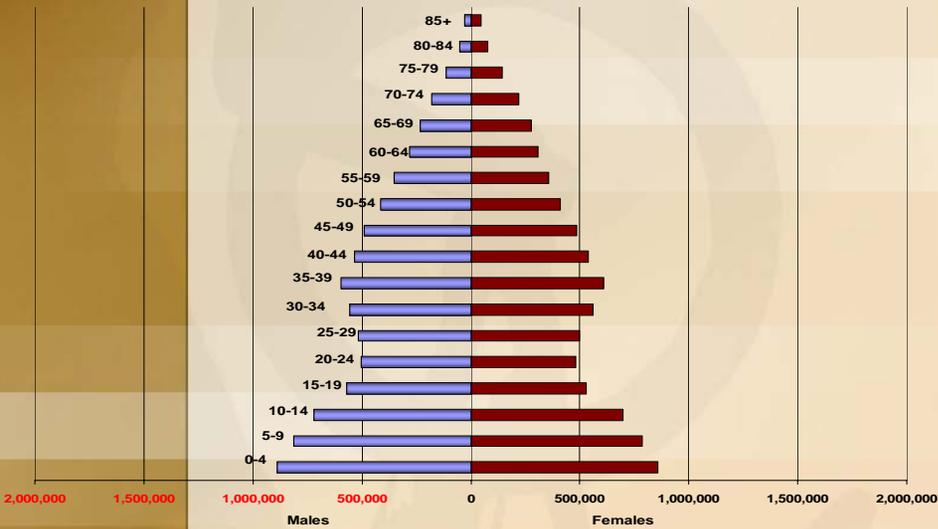
Source: California Dept. of Finance



- WHITE
- LATINO
- NATIVE AMERICAN
- MULTIRACE
- ASIAN AMERICAN
- BLACK
- PACIFIC ISLANDER

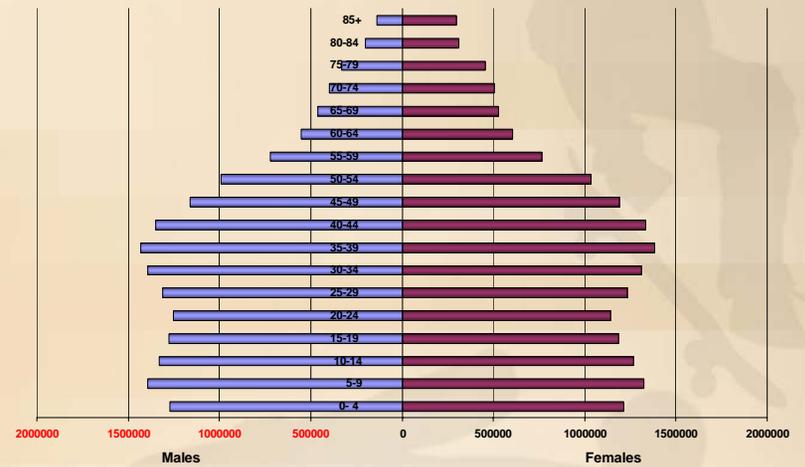
1960

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

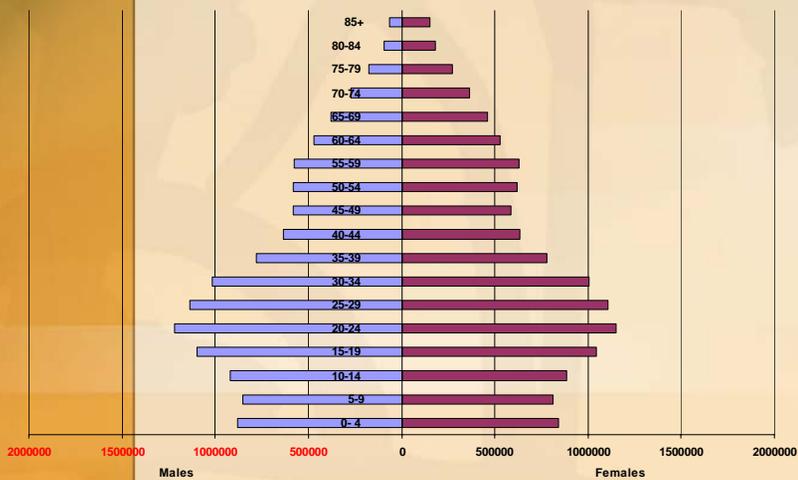


2000

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

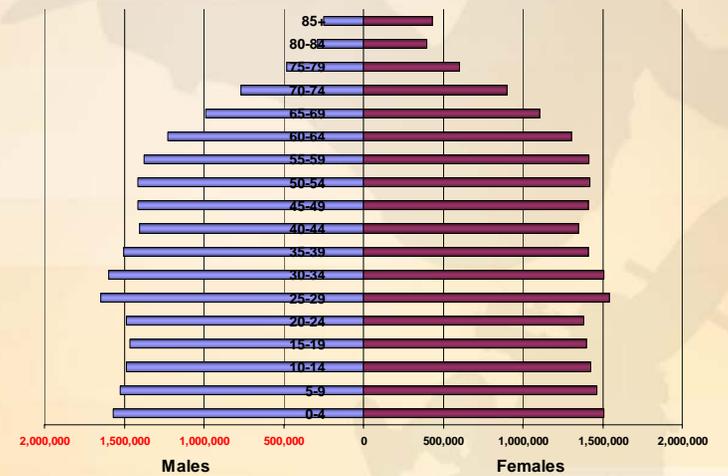


California Population 1980 (Source: UCData Center/CA Dept. of Finance)



1980

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

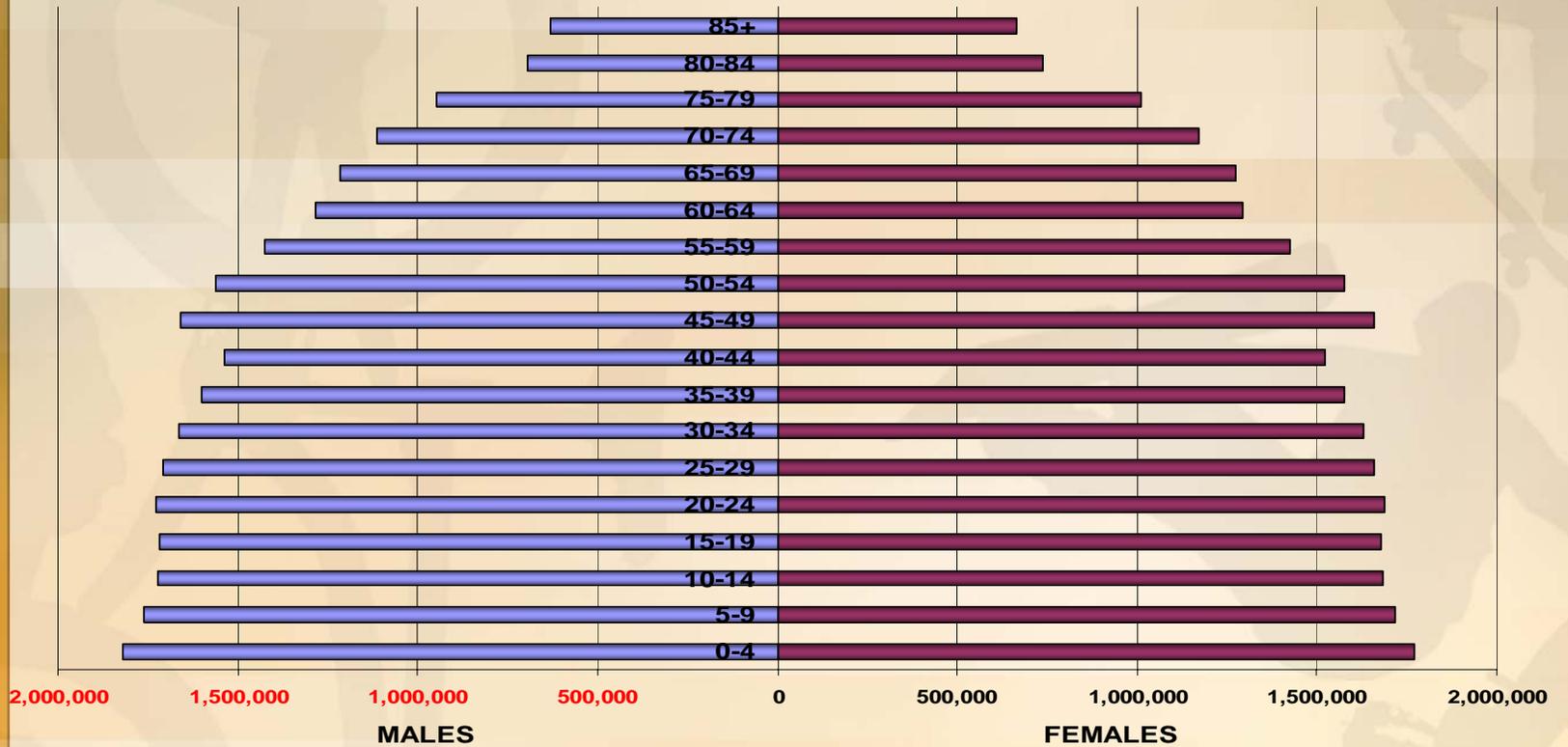


2020



2040

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



More retirees expected to have health and wealth

“Older Americans, compared to 20 years ago, are showing substantially less disability, and that benefit applies to men and women. All of this speaks to an improved quality of life.”

-Richard Hodes, Director, National Institute on Aging

“And they will be a substantially different class of people than previous generations. In 1959, 35% of people over 65 lived in poverty. By 2003, that figure dropped to 10%. The proportion of older Americans with a high school diploma rose to 71.5% in 2003 from 17% in 1950.”

-Rick Lyman, New York Times.

Source: Sacramento Bee, March 10, 2006

About Californians:

- Increasingly avid recreationists using advanced sport equipment and wanting “exciting” risk activities
- Participation patterns, styles and interests differ according to age, culture and ethnicity
- Increasingly less healthy



Source: Park and Recreation Trends in California, May 2005;
Trendscan, May 2005

Implications to Population Changes

1. Additional park land, programs and services are essential along with improved park infrastructure
2. Programs and facilities need to attract and accommodate wide spectrums users
3. Methods to retain new users will have to be fine-tuned

Understanding the most likely direction of change may enable providers to position their services and respond more quickly to market changes.

The question we need to ask ourselves is, “**Are we remaining relevant to California’s changing population?**”

2. Changing recreation activity patterns



Californians are recreating less now than five years ago

- Reasons: lack of time and restrictions due to work This leads to... “Activity Stacking”
- Activities that can be accomplished in short, discreet blocks are preferred
- Major attention to “off employment hours”/24 hour provider of services
- Teaching people how to relax may require as much skill as teaching people how to be active



Source: Public Opinions and Attitudes on Outdoor Recreation in California 2002 & National Survey on Recreation and the Environment, 2000 (NSRE)

Implications of Changing Activity Patterns

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



3. Emphasis on health & wellness

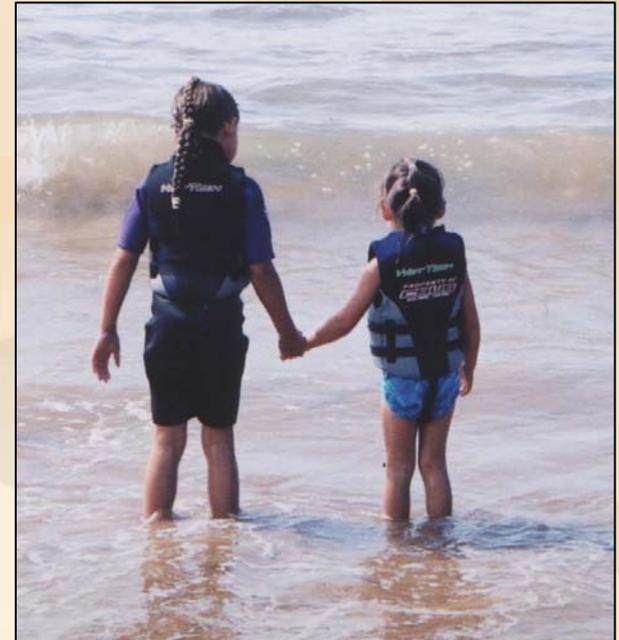


- A. Lack of Physical Activity
- B. Threats to our well-being
- C. Lack of Leisure Time and its Implications



A. Lack of physical activity – key points

- 74% of Americans not regularly active
- 3 year olds spend approx. 79% of their time being sedentary
- 1 in 4 teens Nationally have no safe park or open space near their home
- Inactivity rates for teen girls in CA doubled between 2001 and 2005
- Physical inactivity twice as high among CA teens with no access to open space



Trendscan, May 2005; Adolescents Increasingly Inactive, UCLA Health Policy Brief, April 2005

B. Threats to our well-being

California:

- 26% do not regularly engage in exercise or recreation
- 26% of youth are overweight
- *Everybody* – all gender, age, race/ethnic groups have increased their weight during the past decade
- One of every 7 adolescents indicate their school does not require PE
- Recreation and park facilities being recognized to help promote physical activity

Source: UCLA Center for Disease Control and Prevention as reported by “The Health and Social Benefits of Recreation” and TrendsCan, September 2005 and TrendsCan, May 2005

C. Lack of Leisure Time and its Implications:

- Fatigue, accidents and injuries
- Increased consumption of high-fat, high sugar fast foods
- Job stress and burn out
- Less time to spend caring for children and older parents
- Fewer hours available to volunteer
- Little time for spiritual growth or self-development

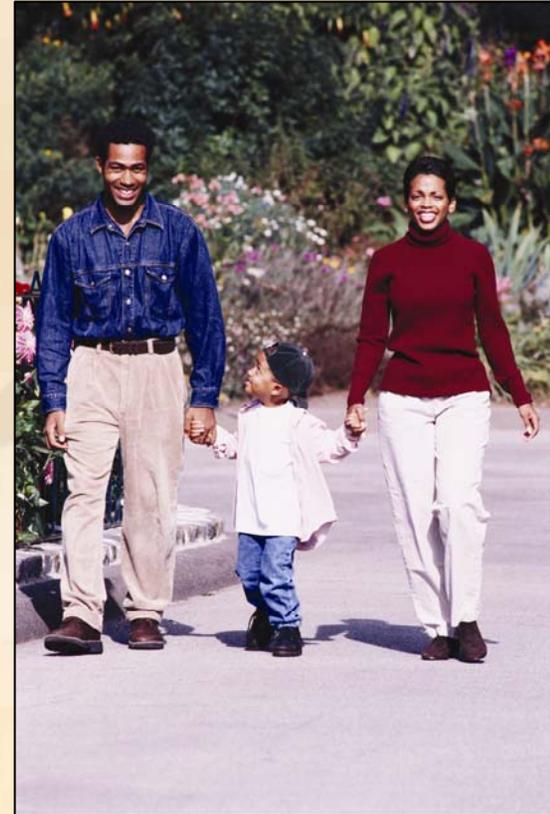
Implications continued

- \$25 billion in medical care, lost productivity and workers' compensation for being overweight and physically inactive; \$2 billion annually to California
- Park professionals need to promote the link between parks and recreation facilities and improved health and wellness



Recommendations to park professionals:

- **Place emphasis on lifetime, physical activity skills for adolescents**
- **Continue to invest resources in creating accessible and safe environments**
- **Work with schools to include a provision of PE in curriculum**



Trendscan, May 2005; Adolescents Increasingly Inactive, UCLA Health Policy Brief, April 2005

4. Favorite recreation activities

So much to do...never enough time!



Activity Participation in California

Most Popular Activities

Walking
Driving for pleasure
Historic sites & museums
Outdoor cultural events
Beach activities
Visiting nature museums
Picnicking
Wildlife viewing
Hiking
Using turf-ed areas

Most Preferred Activities

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

National Activity Participation

Most popular outdoor recreation activities in the Nation:

- Walking
- Family gatherings
- Viewing natural scenery
- Visiting a nature center, nature trail or zoo
- Picnicking
- Sightseeing
- Driving for pleasure
- Visiting historic sites
- Viewing wildlife
- Viewing wildflowers



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

National comparison of traditional activities

<u>Activities</u>	<u>1995</u>	<u>2004</u>
Bicycling	68%	47%
Swimming	60%	42%
Baseball	29%	22%
Fishing	25%	18%
Touch football	16%	10%

A *USA Today* analysis of information from the National Sporting Goods Association made the comparisons in activity participation by 7 to 11 year olds between 1995 and 2004 for traditional sports. Source: Trend Scan August 2005

Comparisons: National vs. California

<u>Activities</u>	<u>National</u>	<u>California</u>
Walking	82%	91%
Hiking	33%	<u>69%</u>
Backpacking	10%	20%
Developed camping	26%	<u>50%</u>
Primitive camping	16%	28%
Driving for pleasure	50%	<u>90%</u>
Picnicking	55%	<u>77%</u>
Visiting historic/cultural sites	45%	<u>86%</u>
Visiting nature centers, zoos etc.	57%	<u>80%</u>

Source: Public Opinions and Attitudes on Outdoor Recreation in California 2002 & National Survey on Recreation and the Environment, 2000 (NSRE)

Other Activities

Daily averages for American youth are:

- TV watching averaged 3 hours, 51 minutes
- Listening to music, 1 hour, 44 minutes
- Using a computer, 1 hour, 2 minutes
- Playing video games, 49 minutes
- Reading, 43 minutes
- Watching movies, 25 minutes



A *USA Today* analysis of information from the National Sporting Goods Association made the comparisons in activity participation by 7 to 11 year olds between 1995 and 2004 for traditional sports. Source: Trend Scan August 2005

Activities and their implications

- Even less popular activities with stable or declining participation rates will grow
- Traditional activities (hiking, picnicking, etc) will remain popular and will continue to grow
- New activities create demand
- **More users plus more uses equal more conflicts**



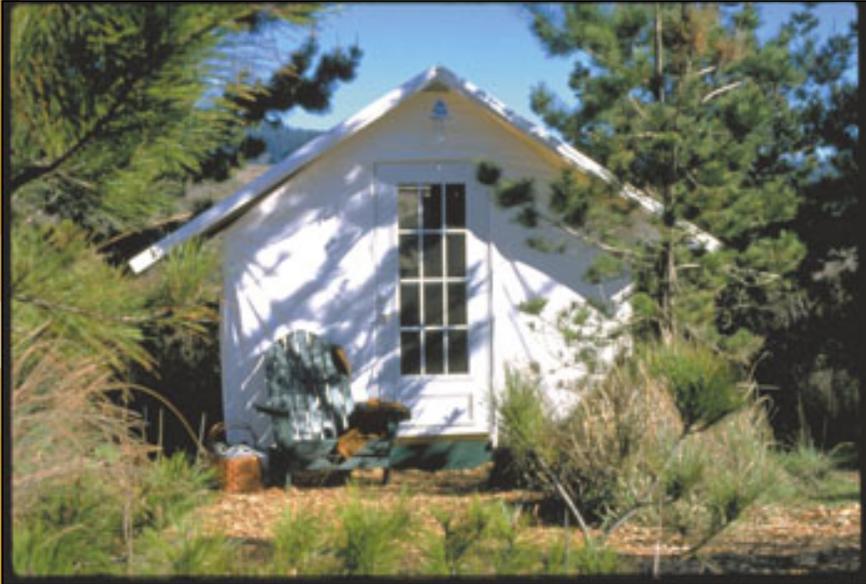
Source: Public Opinions and Attitudes on Outdoor Recreation in California 2002 & National Survey on Recreation and the Environment, 2000 (NSRE)

A few words about alternative camping

- Busy families
- Young families, single moms- safety
- Those not interested in traditional tent camping
- Limited camping experience

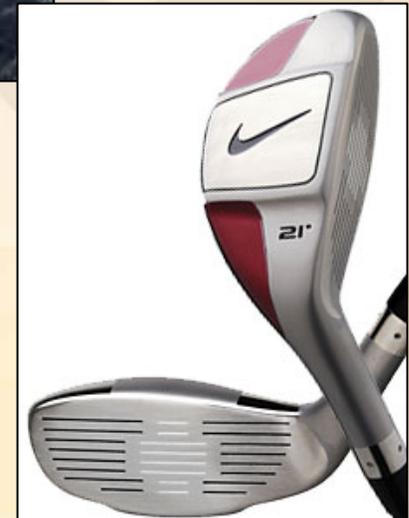
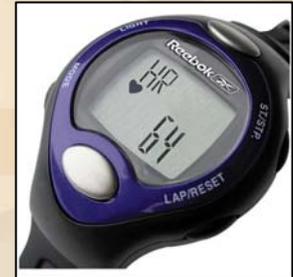


Alternative camping



Big Basin Redwoods State Park

5. Technology and its' effect on the park and recreation profession



Technological Advances Create:

- Multiple requests to access park facilities and engage in programs and services
- New user groups
- Demands on professionals to create more (*and more exciting*) opportunities. Entirely new activities (geocaching, mountain-boarding, slack-lining, often create conflicts with other user groups)



Virtual nature hikes, for example

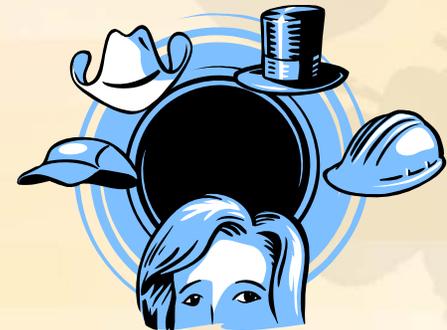
- **NPS introduced E-trips iPODs at Yosemite**
- **Foreign language video interpretations and snow shoe tours**
- **E-hike downloads podcasts offerings**

“For parks to endure for generations, officials say, people must know and love them and feel an emotional tie – even if the closest they ever get to the park is the Web cam image on their computer screens.” Becky Bohrer, Sacramento Bee, March 13, 2006

Losing connection to major market segments due to technological changes

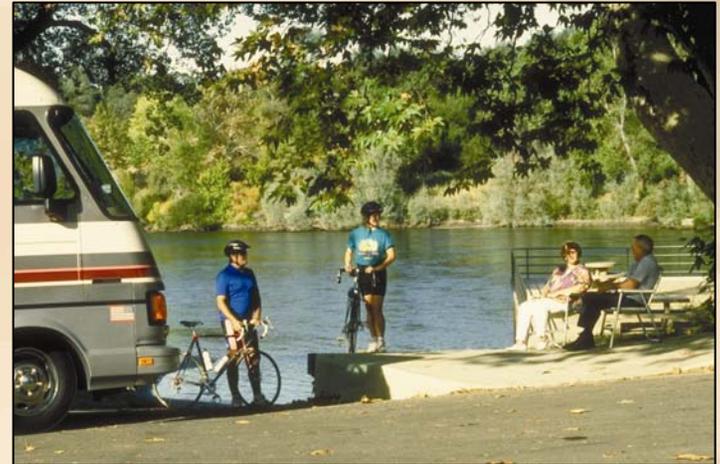
- Technological advances in sports equipment, transportation and communication (new fabrics, light-weight metals, RVs, Wi-Fi) bring new users
- Baby Boomers want amenity-rich and exciting experiences using advanced goods, not just on weekends but throughout the week
- Younger Californians are unfamiliar with traditional facilities/services like fishing, camping and hiking

To summarize: **Park professionals need to wear many hats to accommodate the needs and interests of our clients**



Implications of Technology

- Advances are costly to the consumer and park and recreation service providers
- Pressure to accommodate needs of special interests (geo-caching, bouldering, internet access at campgrounds)
- Requires a different style on management for visitor safety, noise, environmental disturbances and user conflicts



- People want to bring their technology with them while recreating.

6. Trends – in conclusion



- People love parks and are generally satisfied with their condition
- “Space scarcities/land availability becoming more acute”
- People are generally unwilling to pay for services and facilities through higher taxes and additional fees



Source: Public Opinions and Attitudes on Outdoor Recreation in CA, 2002, Recreation Trends and Markets, The 21 Century

- Inability to add operation and maintenance staff and continued lack of funding will result in fewer land acquisitions
- Parks lack top-of-the-mind status, especially historic parks
- Deferred maintenance backlog is at crisis stage



CA Integrated Waste Management; Fair Oaks RPD Tennis Court Resurfacing Project, 2002



Stanford Mansion Rehabilitation project

California's Recreation Policy

Five Major Topic Areas

- Adequacy of recreation opportunities in urban & rural areas
- Leadership in recreation management
- Recreation's role in a healthier California
- Preservation of natural and cultural resource
- Accessibility to all Californians

Additional closing thoughts

- Parks and Recreation not believed to be a job producing industry
- Retirement attrition affecting all of us
- 79% of Americans commute an average of 45 minutes a day, BUT 72% wanted sidewalks and places to walk (CA avg. is 27 minutes)
- Amenities people prefer in their neighborhood include 46% places to bike; 42% places to shop or go to restaurants within walking distance.

Source: DPR Leader's Survey, 2002; National Association of Realtors and Smart Growth America, TrendScan April 2005, CalTrans, 2006



...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.

California State Parks
Planning Division
P.O. Box 942896
Sacramento, CA 94526
www.parks.ca.gov/planning
916 653-9901

