Loudoun County

Parks, Recreation and Community Services

Master Plan - Appendices

2021

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APPENDIX A - ECONOMIC IMPACT OF PARKS, RECREATION AND COMMUNITY SERVICES

The following summarizes the research findings from 2015 when the National Recreation and Parks Association (NRPA) joined forces with the Center for Regional Analysis at George Mason University to estimate the impact of spending by local park and recreation agencies on the U.S. economy. The research adds to the growing body of evidence that the benefits of parks extend well beyond their role as a public amenity and an enhancement to quality of life in their communities.

The analyses covered three areas: a national-level study, state-level assessments, and economic impacts of selected case study parks. Key characteristics of the research include the following:

- The study is focused exclusively on the direct, indirect (business transactions of park agency vendors) and induced (employees spending their earnings) effects local and regional park agencies' spending have on economic activity. The research does not measure the effects of visitor spending or the benefits local and regional park agencies generate for the environment, health and wellness, and property values.
- Data for this analysis comes from the U.S. Census Bureau survey of local government employment and spending data from 1,169 local and regional park agencies accessed from NRPA's PRORAGIS database and/or park system budget data posted online. Data for the case study park analyses were supplied by the relevant park agencies.
- The analyses provide estimates of economic activity (output or the value of transactions), value added (equivalent to gross domestic product), labor income (salaries, wages and benefits) and employment (headcount jobs).

KEY FINDINGS FROM THE NATIONAL STUDY

The U.S. Census Bureau reports that local park and recreation agencies had nearly 371,000 people on their payrolls in 2015. That translates into nearly $31 billion of operations spending by these agencies. That $31 billion ripples through the U.S. economy as park and recreation employees spend their paychecks, and park and recreation agency vendors hire workers and purchase products and services to serve their clients.

As a result, $31 billion of local park and recreation agency operations spending expanded to nearly $91 billion in total economic activity during 2015. That activity boosted real gross domestic product (GDP) by $48.7 billion and supported more than 732,000 jobs that accounted for nearly $34 billion in salaries, wages and benefits across the nation.

Further, local park and recreation agencies also invested an estimated $23.2 billion on capital programs in 2015. The capital spending led to an additional $63.6 billion in economic activity, a contribution of $32.3 billion to GDP, $21.3 billion in labor-related income and nearly 378,000 jobs.

Combining the impact of operations and capital spending finds the nation's local park and recreation agencies generated $154.4 billion in economic activity in 2015, nearly $81.1 billion in value added and more than 1.1 million jobs that boosted labor income by $55.1 billion. Operations and capital spending by local and regional public park agencies generated over $154 billion in economic activity and supported almost 1.1 million jobs in 2015.

WHAT THE RESULTS MEAN

These estimates of the economic impact generated from park and recreation agency spending come from an input-output model that estimates direct, indirect and induced effects of those expenditures.

- Direct Effects are the spending by local park and recreation agencies, whether for operations or capital programs, and include spending for equipment, utilities, goods, services and personnel.
- Indirect Effects capture the spending associated with local park and recreation agencies' vendors. An example is an agency contracting with a local company to spray for mosquitoes. The pest control company will need to hire employees, purchase pesticides and contract with a bookkeeping service. The bookkeeping service rents office space, hires workers, and purchases office supplies, etc.
- Induced Effects reflect the impact of consumer spending (from wages) by park and recreation agency employees and employees working for an agency's vendors.

The model estimates the total effects on output, labor income, value added and employment. Output is essentially a measure of the value of transactions. Labor income includes salaries, wages and benefits. Value added is the measure most equivalent to GDP and includes property income, dividends, corporate profits and other measures. Employment is the number of headcount jobs. The databases used to build the economic input-output model account for fulltime versus part-time employment in the relevant sectors of the economy.

ADDITIONAL ECONOMIC BENEFITS

Loudoun's Parks, Recreation and Community Services Department generates additional economic benefits. While the figures presented in this report are significant, they represent only one aspect of the economic benefits of public parks, and consequently are conservative estimates of the full economic benefits of local Parks, Recreation and Community Services.

Beyond the impact of local park and recreation agency spending, other critical economic contributions from public parks include:

- **Economic Development**: Parks, Recreation and Community Services improves the quality of life in communities and benefits the local economic development of a region. A recent survey notes that three-quarters of corporate executives' rate quality-of-life features as important factors when choosing a location for a headquarters, factory or other company facility.
- **Visitor Spending**: Many local park and recreation agency amenities spur tourism to their respective locales, generating significant economic activity, including (but not limited to) increased sales at local restaurants/bars and hotels. The August 2017 NRPA Park Pulse poll found that park and recreation amenities—such as beaches, parks, trails and secluded and relaxing places—are important to people when choosing a vacation destination.
- **Health and Wellness:** Parks, Recreation and Community Services promotes improved physical and mental health. This not only helps people feel better but can also help lower medical and insurance costs for those people taking advantage of those facilities and activities. Three in five respondents to the November 2017 NRPA Park Pulse poll indicate they would take up walking or jogging in local parks, trails or around their neighborhoods if advised by their doctors to be more physically active.
- **Conservation and Resiliency:** Park and recreation agencies' protection of land, water, trees, open spaces and wildlife improves air and water quality in communities. Through effective land management methods and green infrastructure investments, Parks, Recreation and Community Services make communities more resilient to natural disasters, reducing disaster recovery and insurance costs, Eighty-seven percent of respondents to the 2017 NRPA Americans' Engagement with Parks Survey agree that their local government and local park and recreation agency should make the needed investments to ensure their communities are more resilient to natural disasters.
- **Property Values**: Economic research has demonstrated consistently that homes and properties located near parklands have higher values than those farther away. Higher home values not only benefit the owners of these properties but, in many communities across the United States, add to the tax base of local governments. Eighty-five percent of respondents to the 2017 NRPA Americans' Engagement with Parks Survey seek high-quality park and recreation amenities when they are choosing a place to live.

SUMMARY

Park and recreation agencies advance our nation's communities in many ways. Not only are parks leading the way in terms of conservation, health and wellness and social equity, they are also engines of significant economic activity.

The powerful impact Parks, Recreation and Community Services has on economic activity, when combined with the ability to deliver healthier and happier communities, highlights the fact that these offerings are not merely a "nice-to-have," luxury government service. Rather, Parks, Recreation and Community Services facilities, programs, and services are a critical aspect of what makes a Town, City or County a vibrant and prosperous community.

PRCS should strategically seek opportunities to leverage park and recreation facility development as a means of enhancing the overall economic vitality of the County.

APPENDIX B - RECREATION TRENDS ANALYSIS

The Recreation Trends Analysis provides an understanding of national recreational trends as well as recreational interest by age segments. Trend data used for this analysis was obtained from Sports & Fitness Industry Association's (SFIA), National Recreation and Park Association (NRPA), and Environmental Systems Research Institute, Inc. (ESRI). All trend data is based on current and/or historical participation rates.

It is critically important for PRCS to understand national participation trends in recreation activities. In doing so, the Department can gain general insight into the lifecycle stage of recreation programs and activities (emerging, stable and declining) and thereby anticipate potential changes in need and demand for the programs and activities that it provides to the residents of Loudoun County.

METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Recreational Activities Topline Participation Report 2020* was utilized in evaluating the following trends:

- National Recreation Participatory Trends.
- Core vs. Casual Participation Trends.
- Non-Participant Interest by Age Segment.

The study is based on findings from surveys carried out in 2019 by the Physical Activity Council (PAC), resulting in a total of 18,000 online interviews. Surveys were administered to all genders, ages, income levels, regions, and ethnicities to allow for statistical accuracy of the national population. A sample size of 18,000 completed interviews is considered by SFIA to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.32 percentage points at a 95 percent confidence level. Using a weighting technique, survey results are applied to the total U.S. population figure of 302,756,603 people (ages six and older).

The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S. This study looked at 122 different sports/activities and subdivided them into various categories including: sports, fitness, outdoor activities, aquatics, etc.

CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency of participation. Core participants have higher participatory frequency than casual participants. The thresholds that define casual versus core participation may vary based on the nature of each individual activity. For instance, core participants engage in most fitness activities more than 50-times per year, while for sports, the threshold for core participation is typically 13-times per year.

In a given activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than casual participants. This may also explain why activities with more core participants tend to experience less pattern shifts in participation rates than those with larger groups of casual participants.

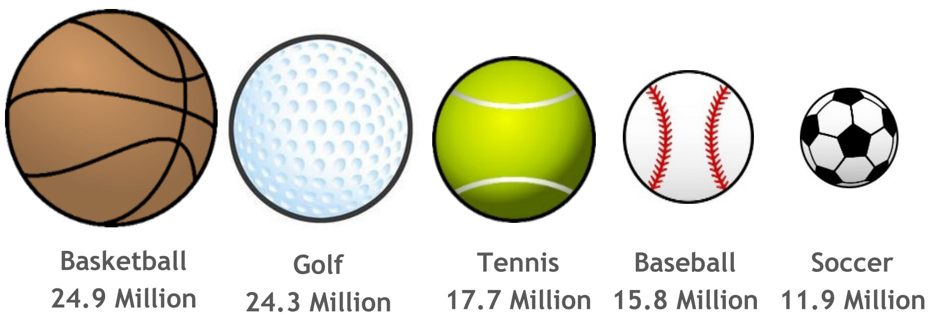
NATIONAL SPORT AND FITNESS PARTICIPATORY TRENDS

NATIONAL TRENDS IN GENERAL SPORTS

PARTICIPATION LEVELS

The sports most heavily participated in the United States were Basketball (24.9 million) and Golf (24.3 million), which have participation figures well in excess of the other activities within the general sports category. Followed by Tennis (17.7 million), Baseball (15.8 million), and Outdoor Soccer (11.9 million).

The popularity of Basketball, Golf, and Tennis can be attributed to the ability to compete with relatively small number of participants. Basketball's success can also be attributed to the limited amount of equipment needed to participate and the limited space requirements necessary, which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game. Even though Golf has experienced a recent decrease in participation in the last 5-years, it still continues to benefit from its wide age segment appeal and is considered a life-long sport. In Addition, target type game venues or Golf Entertainment Venues have increased drastically (84.7%) as a 5-year trend. Using Golf Entertainment as a new alternative may breathe life back into the game of golf.



FIVE-YEAR TREND

Since 2014, Golf- Entertainment Venues (84.7%), Pickleball (40.5%), and Flag Football (23.1%) have emerged as the overall fastest growing sports. During the last five-years, Baseball (20.2%) and Indoor Soccer (17.8%) have also experienced significant growth. Based on the trend from 2014-2019, the sports that are most rapidly declining include Ultimate Frisbee (-49.4%), Squash (-23.4%), Touch Football (-21.5%), Badminton (-15.1%), and Tackle Football (-14.6%).

ONE-YEAR TREND

In general, the most recent year shares a similar pattern with the five-year trends; with Boxing for Competition (8.2%), Golf-Entertainment Venues (6.7%), and Pickleball (4.8%) experiencing the greatest increases in participation this past year. However, some sports that increased rapidly over the past five years have experienced recent decreases in participation, such as Rugby (-10.8%) and Gymnastics (-1.5%). Other sports including Ultimate Frisbee (-15.5%), Sand Volleyball (-7.8%), Roller Hockey (-6.8%), and Touch Football (-6.3) have also seen a significant decrease in participation over the last year.

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

Highly participated in sports, such as Basketball, Baseball, and Slow Pitch Softball, have a larger core participant base (participate 13+ times per year) than casual participant base (participate 1-12 times per year). In the past year, Ice Hockey and Softball -Fast Pitch have increased core participation. While less mainstream sports, such as Boxing for Competition, Roller Hockey, Badminton, and Racquetball have larger casual participation base. These participants may be more inclined to switch to other sports or fitness activities.

National Participatory Trends - General Sports					
Activity	**Participation Levels**			**% Change**	
	2014	**2018**	**2019**	**5-Year Trend**	**1-Year Trend**
Basketball	23,067	24,225	24,917	8.0%	2.9%
Golf (9 or 18-Hole Course)	24,700	24,240	24,271	-1.7%	0.1%
Tennis	17,904	17,841	17,684	-1.2%	-0.9%
Baseball	13,152	15,877	15,804	20.2%	-0.5%
Soccer (Outdoor)	12,592	11,405	11,913	-5.4%	4.5%
Golf (Entertainment Venue)	5,362	9,279	9,905	84.7%	6.7%
Softball (Slow Pitch)	7,077	7,386	7,071	-0.1%	-4.3%
Football, (Flag)	5,508	6,572	6,783	23.1%	3.2%
Volleyball (Court)	6,304	6,317	6,487	2.9%	2.7%
Badminton	7,176	6,337	6,095	-15.1%	-3.8%
Soccer (Indoor)	4,530	5,233	5,336	17.8%	2.0%
Football, (Touch)	6,586	5,517	5,171	-21.5%	-6.3%
Football, (Tackle)	5,978	5,157	5,107	-14.6%	-1.0%
Gymnastics	4,621	4,770	4,699	1.7%	-1.5%
Volleyball (Sand/Beach)	4,651	4,770	4,400	-5.4%	-7.8%
Track and Field	4,105	4,143	4,139	0.8%	-0.1%
Cheerleading	3,456	3,841	3,752	8.6%	-2.3%
Pickleball	2,462	3,301	3,460	40.5%	4.8%
Racquetball	3,594	3,480	3,453	-3.9%	-0.8%
Ice Hockey	2,421	2,447	2,357	-2.6%	-3.7%
Ultimate Frisbee	4,530	2,710	2,290	-49.4%	-15.5%
Softball (Fast Pitch)	2,424	2,303	2,242	-7.5%	-2.6%
Lacrosse	2,011	2,098	2,115	5.2%	0.8%
Wrestling	1,891	1,908	1,944	2.8%	1.9%
Roller Hockey	1,736	1,734	1,616	-6.9%	-6.8%
Boxing for Competition	1,278	1,310	1,417	10.9%	8.2%
Rugby	1,276	1,560	1,392	9.1%	-10.8%
Squash	1,596	1,285	1,222	-23.4%	-4.9%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

NATIONAL TRENDS IN GENERAL FITNESS

PARTICIPATION LEVELS

Overall, national participatory trends in fitness have experienced strong growth in recent years. Many of these activities have become popular due to an increased interest among Americans to improve their health and enhance quality of life by engaging in an active lifestyle. These activities also have very few barriers to entry, which provides a variety of options that are relatively inexpensive to participate in and can be performed by most individuals. The most popular general fitness activities amongst the U.S. population include: Fitness Walking (111.4 million), Treadmill (56.8 million), Free Weights (51.4 million), Running/Jogging (49.5 million), and Stationary Cycling (37.1 million).

Fitness Walking 111.4 Million | **Treadmill 56.8 Million** | **Dumbbell Free Weights 51.4 Million** | **Running/ Jogging 49.5 Million** | **Stationary Cycling 37.1 Million**

FIVE-YEAR TREND

Over the last five years (2014-2019), the activities growing most rapidly are Trail Running (46.0%), Yoga (20.6%), Cross Training Style Workout (20.2%), and Stationary Group Cycling (17.5%). Over the same time frame, the activities that have undergone the biggest decline include: Traditional Triathlon (-9.2%), Running/Jogging (-8.7%), Free Weights (-8.3%), and Fitness Walking (-1.0%)

ONE-YEAR TREND

In the last year, activities with the largest gains in participation were Trail Running (9.9%), Dance, Step, & Choreographed Exercise (7.0%), and Yoga (6.0%). From 2018-2019, the activities that had the largest decline in participation were Traditional Triathlons (-7.7%), Non-Traditional Triathlon (-7.4%), Bodyweight Exercise (-2.8%), and Running/Jogging (-2.6%).

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

The most participated in fitness activities all have a strong core users base (participating 50+ times per year). These fitness activities include: Fitness Walking, Treadmill, Free Weights, Running/Jogging, Stationary Cycling, Weight/Resistant Machines, and Elliptical Motion/Cross Training, all having 48% or greater core users.

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Fitness Walking	112,583	111,001	111,439	-1.0%	0.4%
Treadmill	50,241	53,737	56,823	13.1%	5.7%
Free Weights (Dumbbells/Hand Weights)	56,124	51,291	51,450	-8.3%	0.3%
Running/Jogging	54,188	50,770	49,459	-8.7%	-2.6%
Stationary Cycling (Recumbent/Upright)	35,693	36,668	37,085	3.9%	1.1%
Weight/Resistant Machines	35,841	36,372	36,181	0.9%	-0.5%
Elliptical Motion Trainer	31,826	33,238	33,056	3.9%	-0.5%
Yoga	25,262	28,745	30,456	20.6%	6.0%
Free Weights (Barbells)	25,623	27,834	28,379	10.8%	2.0%
Dance, Step, & Choreographed Exercise	21,455	22,391	23,957	11.7%	7.0%
Bodyweight Exercise	22,390	24,183	23,504	5.0%	-2.8%
Aerobics (High Impact/Intensity Training HIIT)	19,746	21,611	22,044	11.6%	2.0%
Stair Climbing Machine	13,216	15,025	15,359	16.2%	2.2%
Cross-Training Style Workout	11,265	13,338	13,542	20.2%	1.5%
Trail Running	7,531	10,010	10,997	46.0%	9.9%
Stationary Cycling (Group)	8,449	9,434	9,930	17.5%	5.3%
Pilates Training	8,504	9,084	9,243	8.7%	1.8%
Cardio Kickboxing	6,747	6,838	7,026	4.1%	2.7%
Boot Camp Style Cross-Training	6,774	6,695	6,830	0.8%	2.0%
Martial Arts	5,364	5,821	6,068	13.1%	4.2%
Boxing for Fitness	5,113	5,166	5,198	1.7%	0.6%
Tai Chi	3,446	3,761	3,793	10.1%	0.9%
Barre	3,200	3,532	3,665	14.5%	3.8%
Triathlon (Traditional/Road)	2,203	2,168	2,001	-9.2%	-7.7%
Triathlon (Non-Traditional/Off Road)	1,411	1,589	1,472	4.3%	-7.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

NATIONAL TRENDS IN OUTDOOR RECREATION

PARTICIPATION LEVELS

Results from the SFIA report demonstrate a contrast of growth and decline in participation regarding outdoor/adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or within a group, and are not as limited by time constraints. In 2019, the most popular activities, in terms of total participants, from the outdoor/adventure recreation category include: Day Hiking (49.7 million), Road Bicycling (39.4 million), Freshwater Fishing (39.2 million), and Camping within ¼ mile of Vehicle/Home (28.2 million), and Recreational Vehicle Camping (15.4 million).

Hiking	Bicycling	Fishing	Camping	Camping
(Day)	(Road)	(Freshwater)	(<¼mi. of Car/Home)	(Recreational Vehicle)
49.7 Million	39.4 Million	39.2 Million	28.2 Million	15.4 Million

FIVE-YEAR TREND

From 2014-2019, BMX Bicycling (55.2%), Day Hiking (37.2%), Fly Fishing (20.1%), Salt Water Fishing (11.6%), and Mountain Bicycling (7.2%) have undergone the largest increases in participation. The five-year trend also shows activities such as In-Line Roller Skating (-20.5%), Archery (-11.7%), and Adventure Racing (-9.5%) experiencing the largest decreases in participation.

ONE-YEAR TREND

The one-year trend shows activities growing most rapidly being BMX Bicycling (6.1%), Day Hiking (3.8%), and Birdwatching (3.8%). Over the last year, activities that underwent the largest decreases in participation include: Climbing (-5.5%), In-Line Roller Skating (-4.4%), and Camping with a Recreation Vehicle (-3.5%).

CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

A majority of outdoor activities have experienced participation growth in the last five- years. Although this a positive trend, it should be noted that all outdoor activities participation, besides adventure racing, consist primarily of casual users. This is likely why we see a lot of fluctuation in participation numbers, as the casual users likely found alternative activities to participate in.

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	**Participation Levels**			**% Change**	
	2014	**2018**	**2019**	**5-Year Trend**	**1-Year Trend**
Hiking (Day)	36,222	47,860	49,697	37.2%	3.8%
Bicycling (Road)	39,725	39,041	39,388	-0.8%	0.9%
Fishing (Freshwater)	37,821	38,998	39,185	3.6%	0.5%
Camping (< 1/4 Mile of Vehicle/Home)	28,660	27,416	28,183	-1.7%	2.8%
Camping (Recreational Vehicle)	14,633	15,980	15,426	5.4%	-3.5%
Fishing (Saltwater)	11,817	12,830	13,193	11.6%	2.8%
Birdwatching (>1/4 mile of Vehicle/Home)	13,179	12,344	12,817	-2.7%	3.8%
Backpacking Overnight	10,101	10,540	10,660	5.5%	1.1%
Bicycling (Mountain)	8,044	8,690	8,622	7.2%	-0.8%
Archery	8,435	7,654	7,449	-11.7%	-2.7%
Fishing (Fly)	5,842	6,939	7,014	20.1%	1.1%
Skateboarding	6,582	6,500	6,610	0.4%	1.7%
Roller Skating, In-Line	6,061	5,040	4,816	-20.5%	-4.4%
Bicycling (BMX)	2,350	3,439	3,648	55.2%	6.1%
Climbing (Traditional/Ice/Mountaineering)	2,457	2,541	2,400	-2.3%	-5.5%
Adventure Racing	2,368	2,215	2,143	-9.5%	-3.3%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

NATIONAL TRENDS IN AQUATICS

PARTICIPATION LEVELS

Swimming is deemed as a lifetime activity, which is most likely why it continues to have such strong participation. In 2019, Fitness Swimming was the absolute leader in overall participation (28.2 million) amongst aquatic activities, largely due to its broad, multigenerational appeal.

Swimming (Fitness) 28.2 Million

Aquatic Exercise 11.2 Million

Swimming (Competition) 2.8 Million

FIVE-YEAR TREND

Assessing the five-year trend, all aquatic activities have experienced growth. Aquatic Exercise stands out having increased (22.7%) from 2014-2019, most likely due to the ongoing research that demonstrates the activity's great therapeutic benefit, followed by Fitness Swimming (11.5%) and Competition Swimming (4.1%).

ONE-YEAR TREND

From 2018-2019, Competition Swimming (-7.3%) was the only aquatic activity that declined in participation. While both Aquatic Exercise (6.4%) and Fitness swimming (2.3%) experienced increases when assessing their one-year trend.

CORE VS. CASUAL TRENDS IN AQUATICS

All aquatic activities have undergone increases in participation over the last five years, primarily due to large increases in casual participation (1-49 times per year). From 2014 to 2019, casual participants for Aquatic Exercise (35.7%), Competition Swimming (22.7%), and Fitness Swimming (18.4%) have all grown significantly. However, all core participation (50+ times per year) for aquatic activities have decreased over the last five-years.

National Participatory Trends - Aquatics

Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Swimming (Fitness)	25,304	27,575	28,219	11.5%	2.3%
Aquatic Exercise	9,122	10,518	11,189	22.7%	6.4%
Swimming (Competition)	2,710	3,045	2,822	4.1%	-7.3%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

PARTICIPATION LEVELS

The most popular water sports / activities based on total participants in 2019 were Recreational Kayaking (11.4 million), Canoeing (8.9 million), and Snorkeling (7.7 million). It should be noted that water activity participation tends to vary based on regional, seasonal, and environmental factors. A region with more water access and a warmer climate is more likely to have a higher participation rate in water activities than a region that has a long winter season or limited water access. Therefore, when assessing trends in water sports and activities, it is important to understand that fluctuations may be the result of environmental barriers which can greatly influence water activity participation.

FIVE-YEAR TREND

Over the last five years, Stand-Up Paddling (29.5%) and Recreational Kayaking (28.5%) were the fastest growing water activity, followed by White Water Kayaking (9.9%) and Surfing (8.9%). From 2014-2019, activities declining in participation most rapidly were Water Skiing (-20.1%), Jet Skiing (-19.6%), Scuba Diving (-13.7%), Wakeboarding (-12.7%), and Snorkeling (-12.5%).

ONE-YEAR TREND

Similarly, to the five-year trend, Recreational Kayaking (3.3%) and Stand-Up Paddling (3.2%) also had the greatest one-year growth in participation, from 2018-2019. Activities which experienced the largest decreases in participation in the most recent year include: Boardsailing/Windsurfing (-9.7%), Sea Kayaking (-5.5), and Water Skiing (-4.8%)

CORE VS. CASUAL TRENDS IN WATER SPORTS/ACTIVITIES

As mentioned previously, regional, seasonal, and environmental limiting factors may influence the participation rate of water sport and activities. These factors may also explain why all water-based activities have drastically more casual participants than core participants, since frequencies of activities may be constrained by uncontrollable factors. These high casual user numbers are likely why a majority of water sports/activities have experienced decreases in participation in recent years.

National Participatory Trends - Water Sports / Activities					
Activity	**Participation Levels**			**% Change**	
	2014	**2018**	**2019**	**5-Year Trend**	**1-Year Trend**
Kayaking (Recreational)	8,855	11,017	11,382	28.5%	3.3%
Canoeing	10,044	9,129	8,995	-10.4%	-1.5%
Snorkeling	8,752	7,815	7,659	-12.5%	-2.0%
Jet Skiing	6,355	5,324	5,108	-19.6%	-4.1%
Sailing	3,924	3,754	3,618	-7.8%	-3.6%
Stand-Up Paddling	2,751	3,453	3,562	29.5%	3.2%
Rafting	3,781	3,404	3,438	-9.1%	1.0%
Water Skiing	4,007	3,363	3,203	-20.1%	-4.8%
Surfing	2,721	2,874	2,964	8.9%	3.1%
Wakeboarding	3,125	2,796	2,729	-12.7%	-2.4%
Scuba Diving	3,145	2,849	2,715	-13.7%	-4.7%
Kayaking (Sea/Touring)	2,912	2,805	2,652	-8.9%	-5.5%
Kayaking (White Water)	2,351	2,562	2,583	9.9%	0.8%
Boardsailing/Windsurfing	1,562	1,556	1,405	-10.1%	-9.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

NON-PARTICIPANT INTEREST BY AGE SEGMENT

In addition to participation rates by generation, SFIA also tracks non-participant interest. These are activities that the U.S. population currently does not participate in due to physical or monetary barriers, but is interested in participating in. Below are the top five activities that each age segment would be most likely to partake in, if they were readily available.

Overall, the activities most age segments are interested in include: Camping, Bicycling, Fishing, and Swimming for Fitness. All of which are deemed as low-impact activities, making them obtainable for any age segment to enjoy.

6-12 Year-Olds

Fishing
Camping
Soccer
Martial Arts
Basketball

13-17 Year-Olds

Fishing
Camping
Working out w/ Weights
Volleyball
Running/Jogging

18-24 Year-Olds

Camping
Fishing
Martial Arts
Volleyball
Kayaking

25-34 Year-Olds

Camping
Fitness Swimming
Bicycling
Fishing
Kayaking

35-44 Year-Olds

Fitness Swimming
Camping
Bicycling
Fishing
Hiking

45-54 Year-Olds

Bicycling
Fishing
Camping
Fitness Swimming
Hiking

55-64 Year-Olds

Bicycling
Fishing
Fitness Swimming
Camping
Hiking

65+ Year-Olds

Fishing
Fitness Swimming
Bicycling
Birdwatching/Wildlife viewing
Working out using machines

APPENDIX C - BENCHMARK ANALYSIS

INTRODUCTION

The Consulting Team identified metrics to be benchmarked against comparable Parks, Recreation and Community Services systems as provided by PRCS staff. The complexity in this analysis was ensuring direct comparison through a methodology of statistics and ratios in order to provide objective information that is relevant and accurate, as best as possible.

It must be noted that the benchmark analysis is only an indicator based on the information provided. The information sought was a combination of metrics based on jurisdiction size and park inventories. The attributes considered for selection in this benchmark study included:

- Jurisdiction population size
- Jurisdiction land area size
- County Parks, Recreation and Community Services service delivery

Benchmark analysis incorporates a mix of systems that are close in geographical proximity to Paulding County. The benchmark includes the following agencies:

Agency	State	Jurisdiction Type	Population	Jurisdiction Size (Sq. Mi.)	Population per Sq. Mi.
Arlington County	VA	County	236,842	25.98	9,116
Fairfax County Park Authority	VA	Park Authority	1,147,532	407.00	2,819
Loudoun County	VA	County	385,945	521.00	741
Mecklenburg County	NC	County	1,110,356	546.00	2,034
Prince William County	VA	County	460,472	348.00	1,323

Due to difference in how each system collects, maintains, and reports data, variances exist. These variations have an impact on the per capita and percentage allocations; hence the overall comparison must be viewed with this in mind.

The benchmark data collection for all systems was obtained in 2020. Population figures used for analysis reflect data from the US Census, as of July 1, 2020. While it is possible that there may have been changes or updates in the data provided, to ensure consistency only the original figures obtained at that time have been used in the benchmark. The goal is to evaluate how PRCS is positioned among peer agencies as it applies to the delivery of its parks system through data that offers a view of each system's park acreage and indoor facility inventory.

COMPARISON OF SERVICE AREA, INVENTORIES, AND OPERATIONS

TOTAL AND NATURE PARK ACREAGE

This section provides a general overview of each system within the benchmark analysis. The table below describes the total acreage, total nature park acres and percentage of nature park acres within each benchmark agency.

Agency	Population	Total Acres	Total Nature Park Acres	Percentage of Nature Park Acres
Arlington County	236,842	924	181	20%
Fairfax County Park Authority	1,147,532	23,338	13,168	56%
Loudoun County	423,046	3,141	1,159	37%
Mecklenburg County	1,110,356	21,122	11,440	54%
Prince William County	460,472	5,312	1,834	35%

TOTAL PARK ACREAGE

In total acres, the benchmark agencies range from 924 acres - 23,338 acres. Loudoun County ranks fourth out of the five benchmark agencies in total park acreage and is below the benchmark median of 10,768 total acres.

NATURAL PARK ACREAGE

In natural park acres, the benchmark agencies range from 181 acres - 13,168 acres. Loudoun County ranks fourth out of the five benchmark agencies in total nature park acreage but ranks third in percentage of nature parks acreage (37%). The benchmark median for percentage of nature park acres is 40%.

DEVELOPED PARK ACREAGES

This section provides a general overview of each system within the benchmark analysis. The table below describes the total developed acres, total residents per developed acre and level of service (total park acres per 1,000 residents) for each agency.

Agency	Population	Total Developed Acres	Total Residents per Developed Acre	Total Developed Acres per 1,000 Residents
Arlington County	236,842	743	318.8	3.14
Fairfax County Park Authority	1,147,532	10,170	112.8	8.86
Loudoun County	423,046	1,982	213.5	4.68
Mecklenburg County	1,110,356	9,682	114.7	8.72
Prince William County	460,472	3,478	132.4	7.55

DEVELOPED PARK ACRES

In developed acres, the benchmark agencies range from 743 acres – 10,170 acres. Loudoun County ranks fourth out of the five benchmark agencies in total developed park acreage and is below the benchmark median of 5,211 developed acres.

TOTAL RESIDENTS PER DEVELOPED ACRE

In total residents per developed acre, the benchmark agencies range from 112 residents per acre – 256 residents per acre. Loudoun County ranks fourth out of the five benchmark agencies in residents per developed park acre and is above the benchmark median of 178 residents per developed acre.

LEVEL OF SERVICE – DEVELOPED PARK ACRES

When comparing a population based level of service for developed park acreage, there is a wide range of coverage among the benchmark agencies, from 3.14 to 8.86 acres per 1,000 residents. Loudoun County's 4.68 acres per 1,000 residents ranks below the benchmark median (6.59 acres per 1,000).

INDOOR RECREATION/COMMUNITY/SENIOR/ADULT DAY CARE CENTERS

This section provides a general overview of the indoor centers available to residents as provided by the benchmark agencies. The table below describes the total number of facilities and level of service (total per 75,000 residents for each agency).

Agency	Population	Community/ Recreation/ Senior Centers	Total Facilities per 75,000 Residents
Arlington County	236,842	16	5.07
Fairfax County Park Authority	1,147,532	9	0.59
Loudoun County	423,046	17	3.01
Mecklenburg County	1,110,356	21	1.42
Prince William County	460,472	5	0.81

INDOOR RECREATION/COMMUNITY/SENIOR/ADULT DAY CARE CENTERS

The benchmark agencies range from 5 facilities – 21 facilities. Loudoun County ranks second out of the five benchmark agencies in total number of facilities and is above the benchmark median of 14 developed acres.

LEVEL OF SERVICE – INDOOR FACILITIES

When comparing a population based level of service for indoor facilities, there is a wide range of coverage among the benchmark agencies, from 0.59 to 5.07 acres per 75,000 residents. Loudoun County's 3.01 facilities per 75,000 residents ranks above the benchmark median (2.18 facilities per 75,000).

KEY TAKEAWAYS

PERCENTAGE OF NATURE PARK ACRES

Least nature park acres: Arlington County – 20% natural

Most nature park acres: Fairfax County Park Authority– 56% natural

Benchmark median – 40% natural

Loudoun County – 37% natural

TOTAL DEVELOPED PARK ACRES PER 1,000 POPULATION

Benchmark leader: Fairfax County Park Authority – 8.86 acres/1,000 residents

Benchmark bottom: Arlington County – 3.14 acres/1,000 residents

Benchmark median – 6.59 acres/1,000 residents

Loudoun County – 4.68 acres/1,000 residents

TOTAL INDOOR RECREATION/COMMUNITY/SENIOR FACILITIES PER 75,000 POPULATION

Benchmark leader: Arlington County – 5.07 facilities/75,000 residents

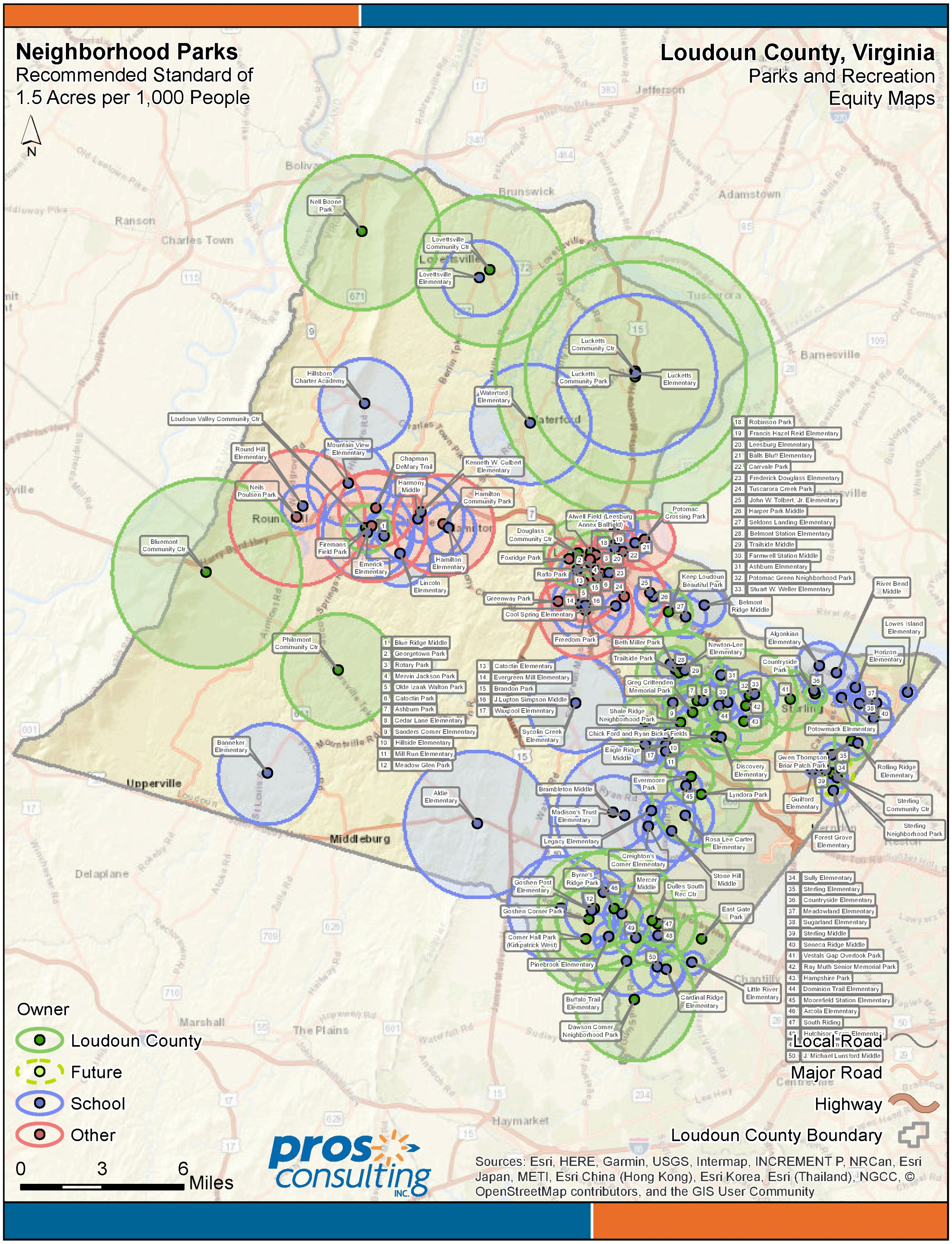
Benchmark bottom: Fairfax County Park Authority – 0.59 acres/75,000 residents

Benchmark median – 2.18 facilities/75,000 residents

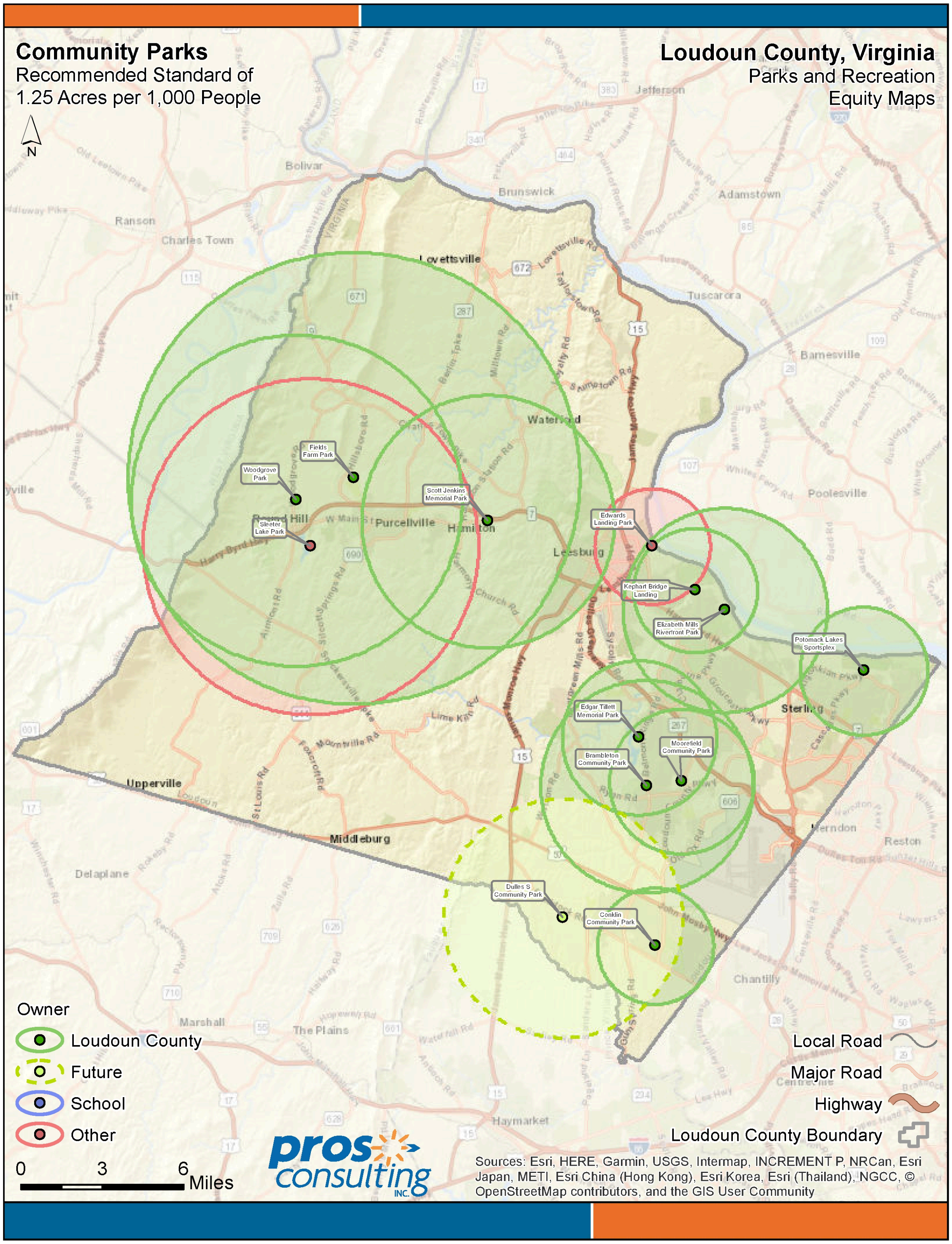
Loudoun County – 3.01 facilities/75,000 residents

APPENDIX D – EQUITY MAPPING

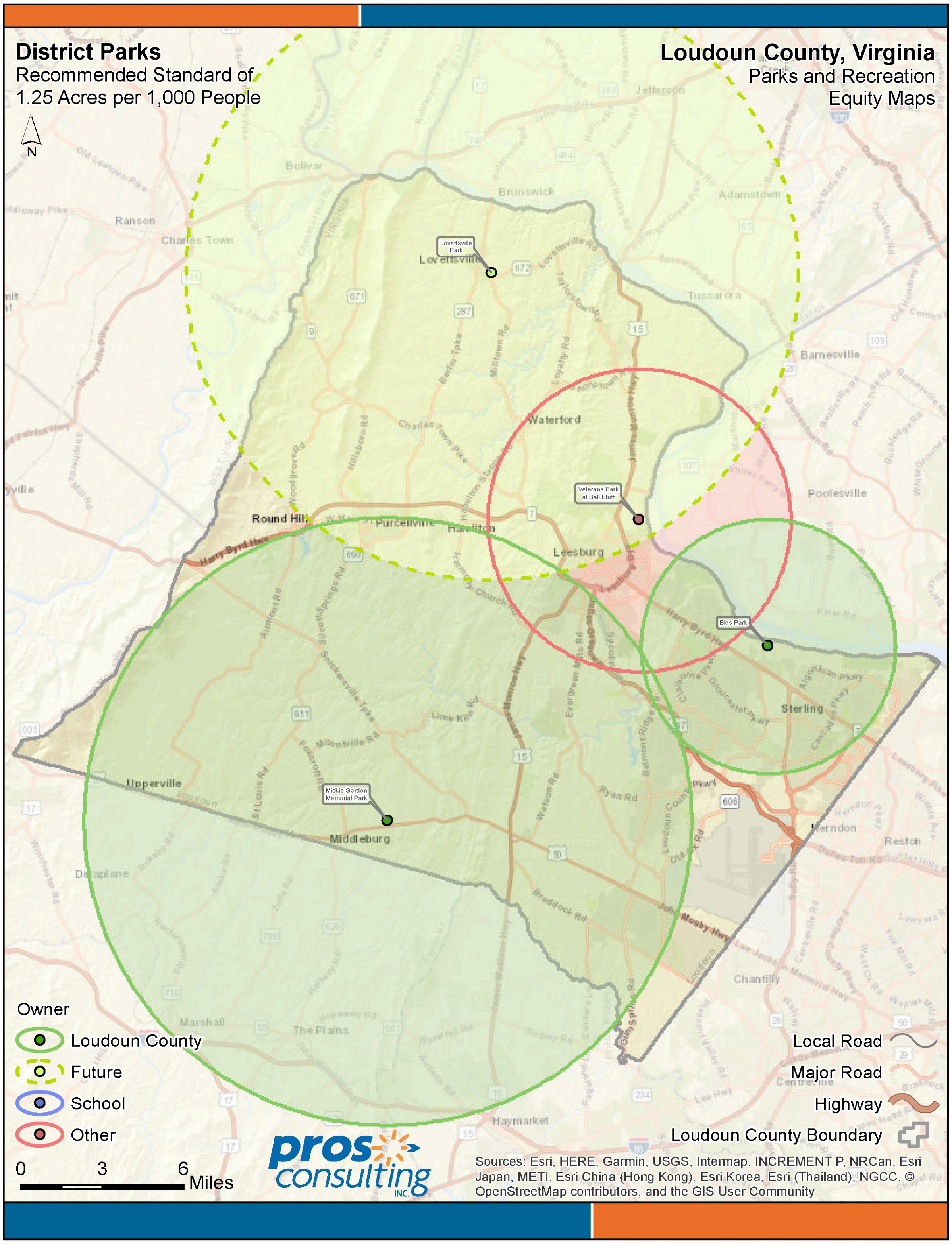
Neighborhood Parks – Strong geographical equity within population centers of the County for neighborhood parks.



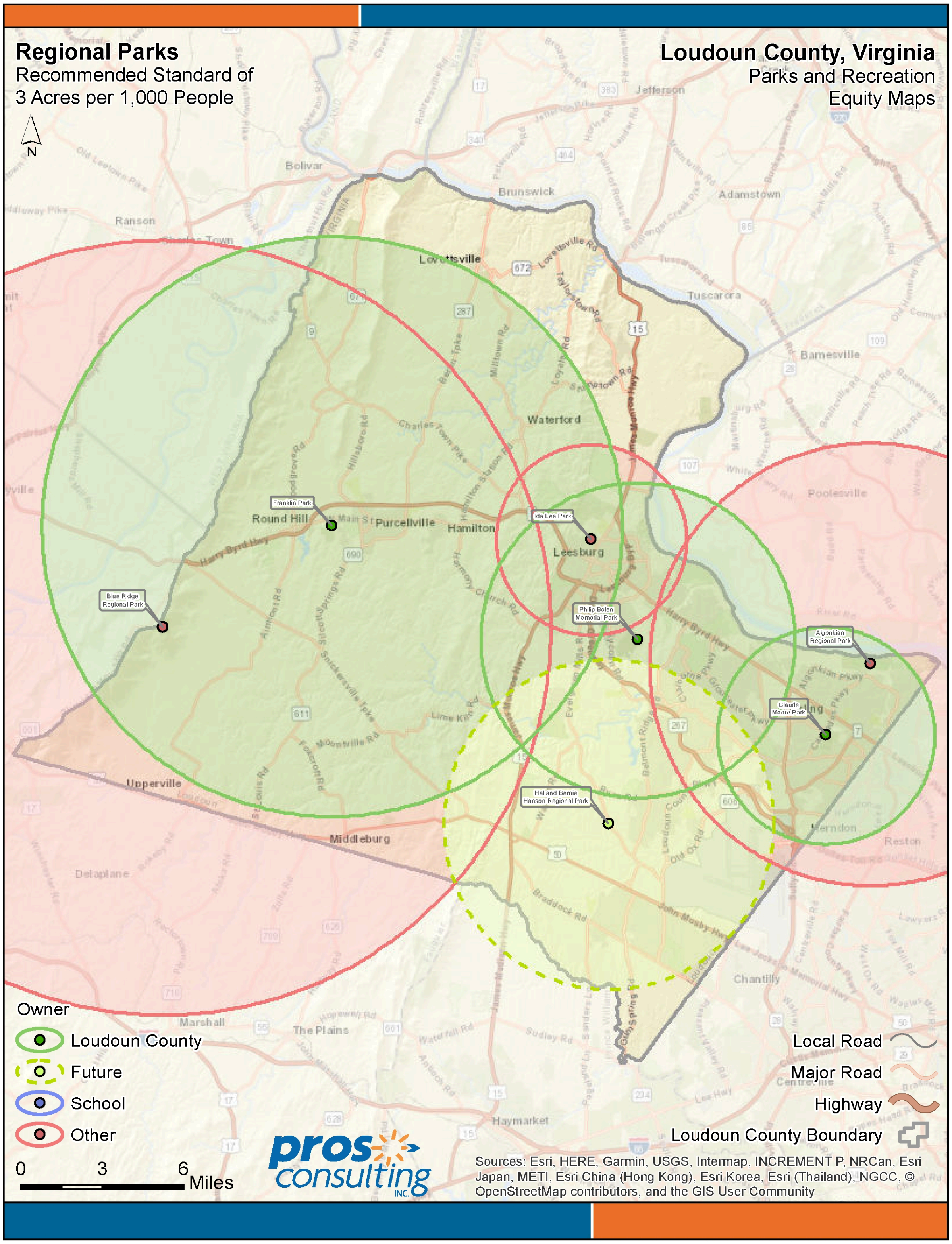
Community Parks – Strong geographical equity in and around the population centers for community parks.



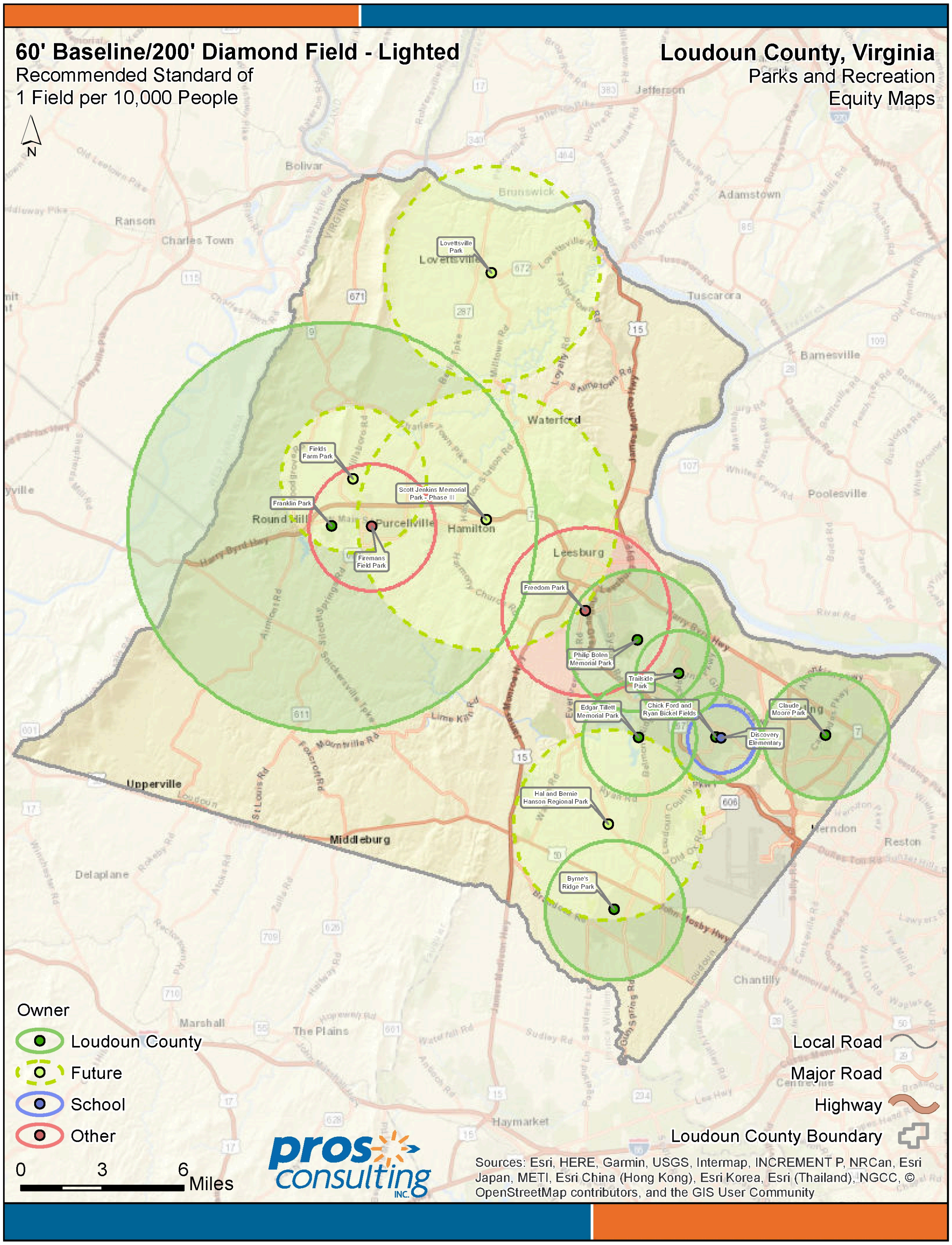
District Parks - Current and Future District Parks will provide for significant equity for almost the entire County.



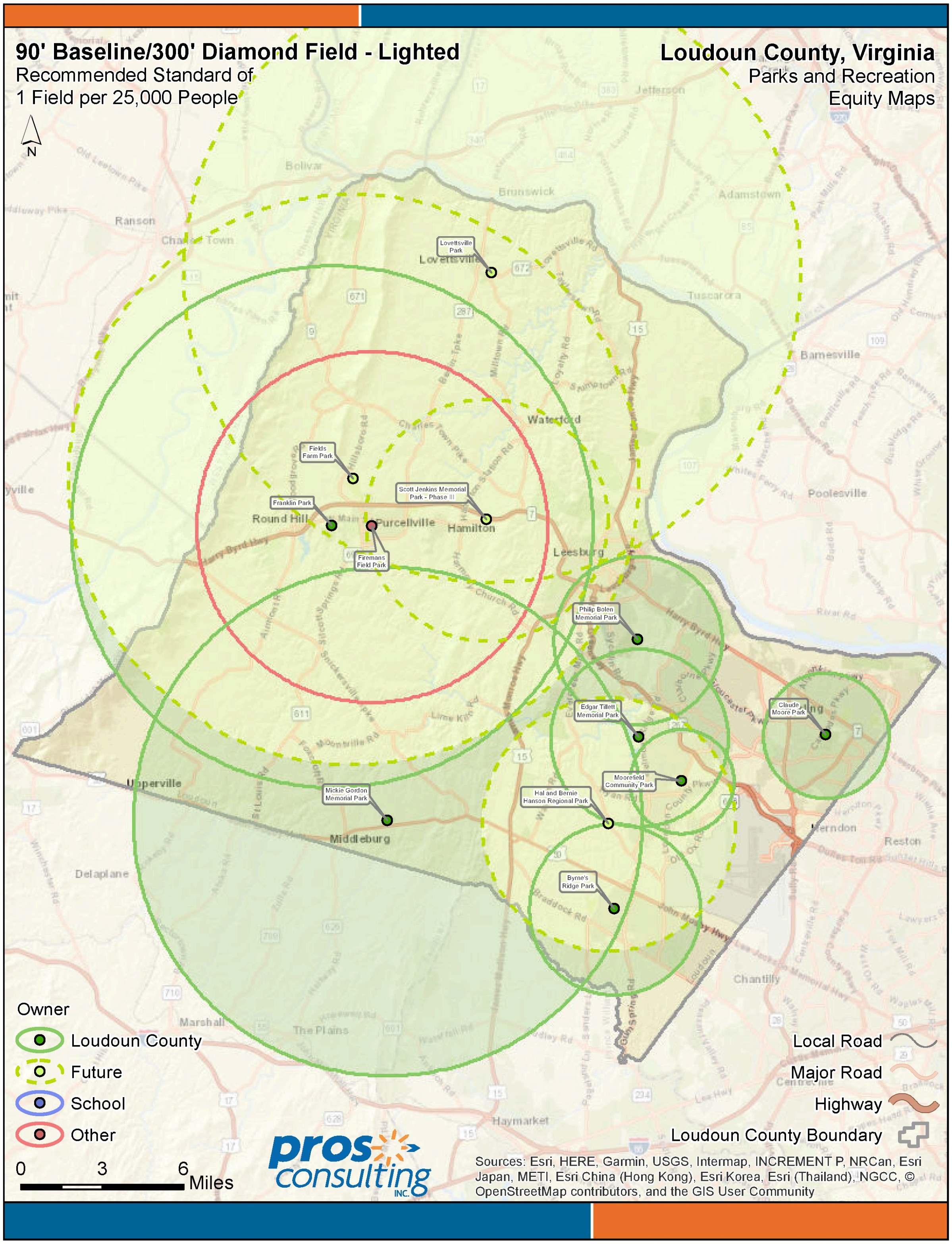
Regional Parks - Current and future regional parks will provide significant equity for almost the entire County.



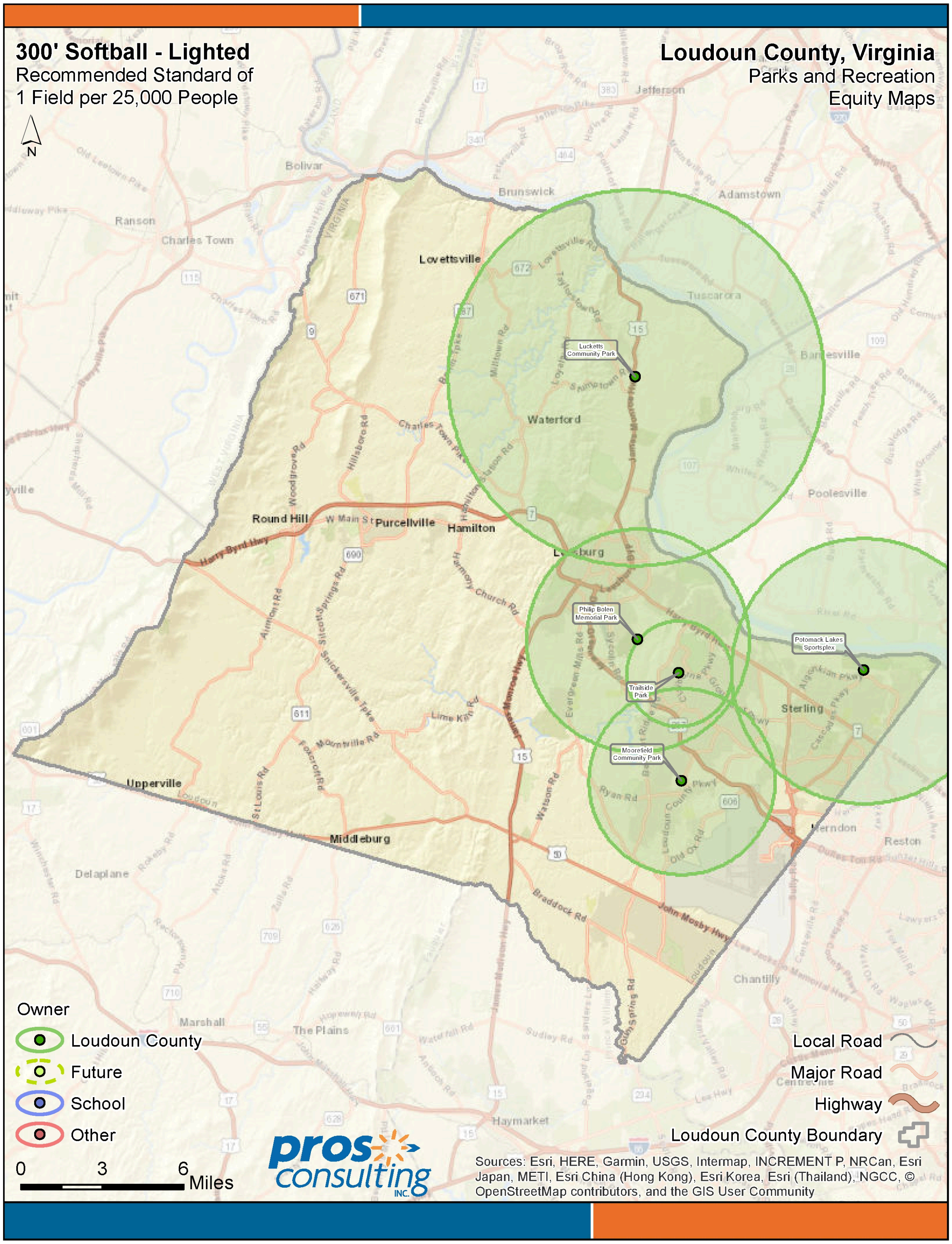
60' Baseline/200' Diamond Field - Lighted - Current and future inventory will provide significant equity throughout the County.



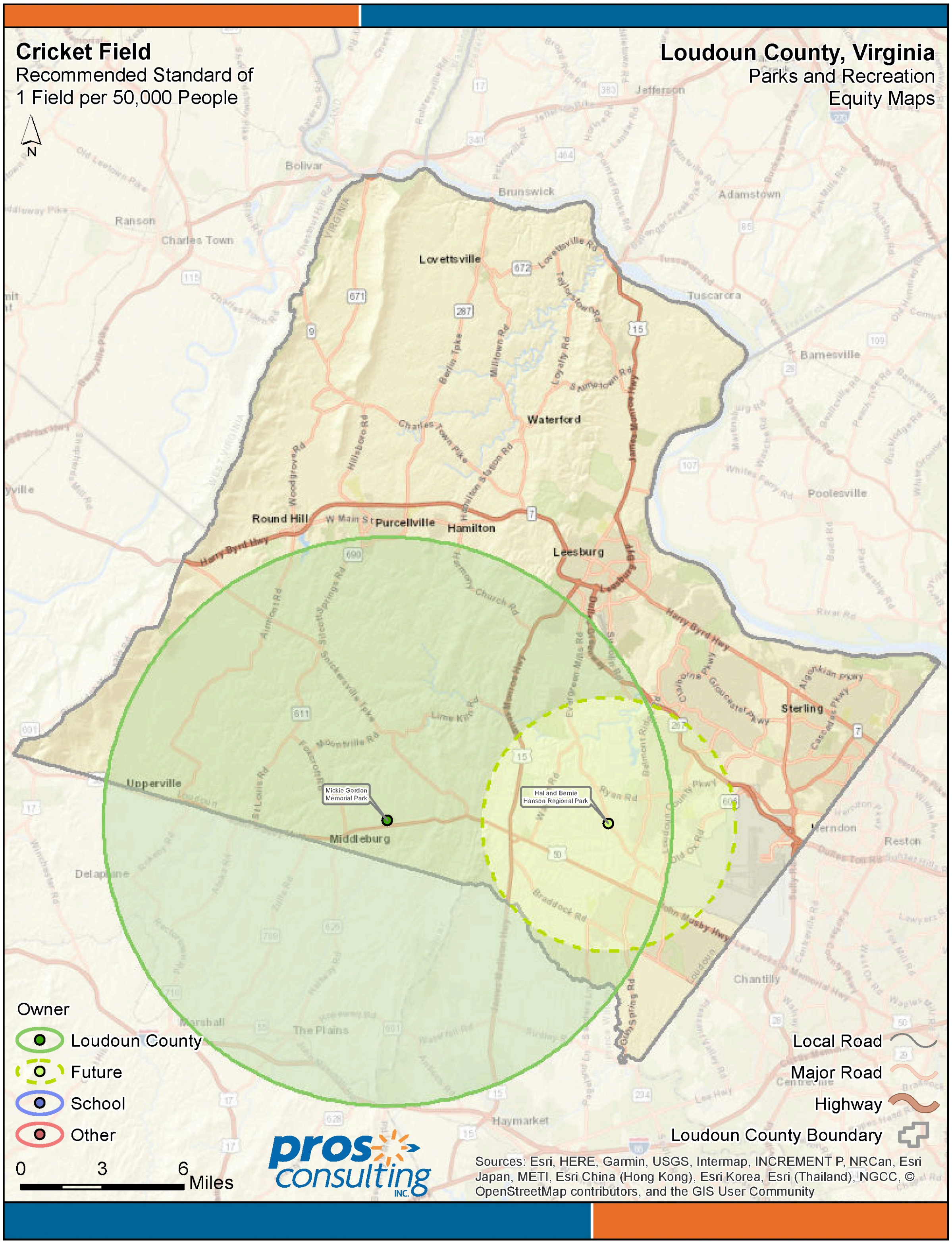
90' Baseline/300' Diamond Field - Lighted - Current and future inventory will provide significant equity throughout the County.



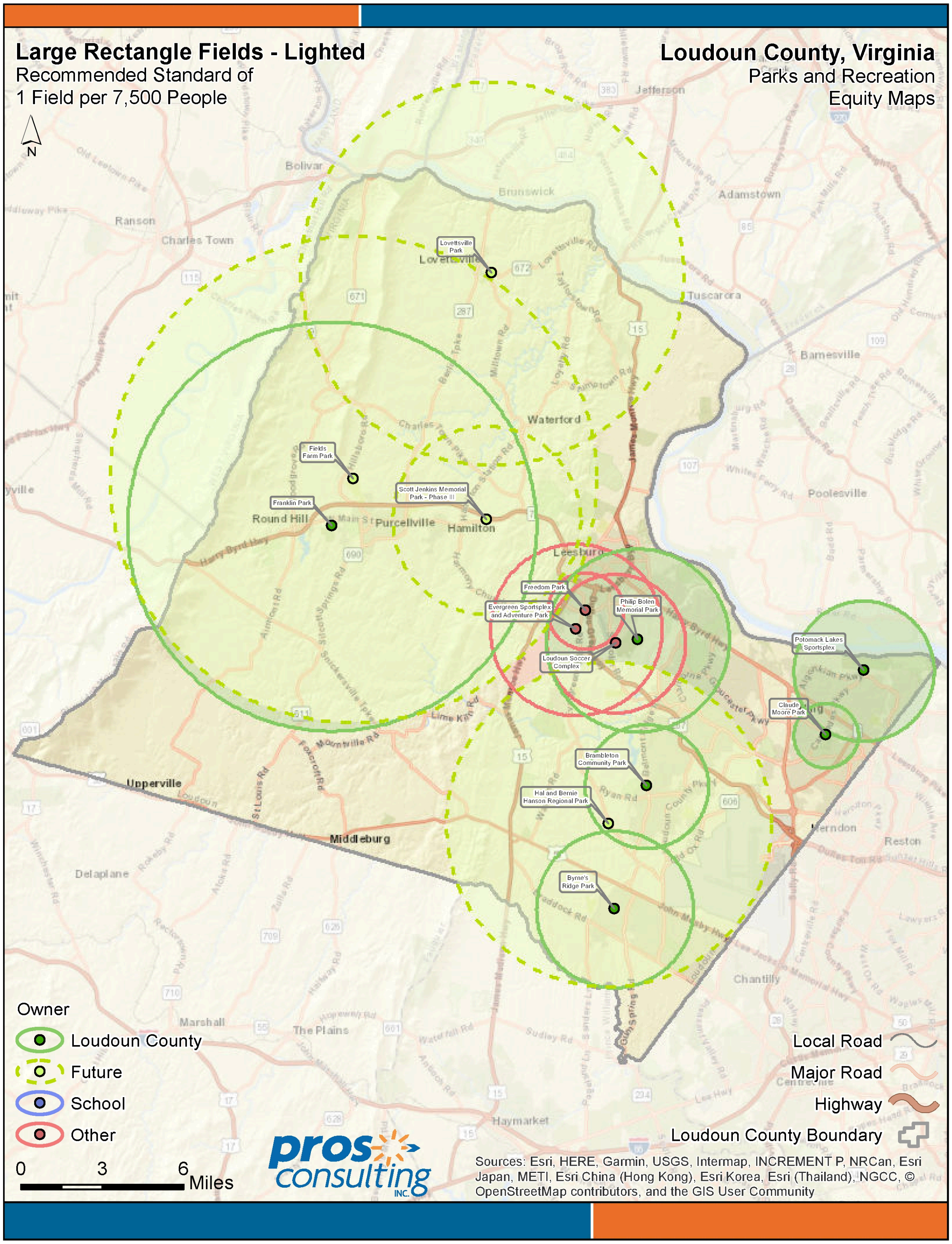
300' Softball - Lighted - Opportunity exists to expand softball field offerings in the County.



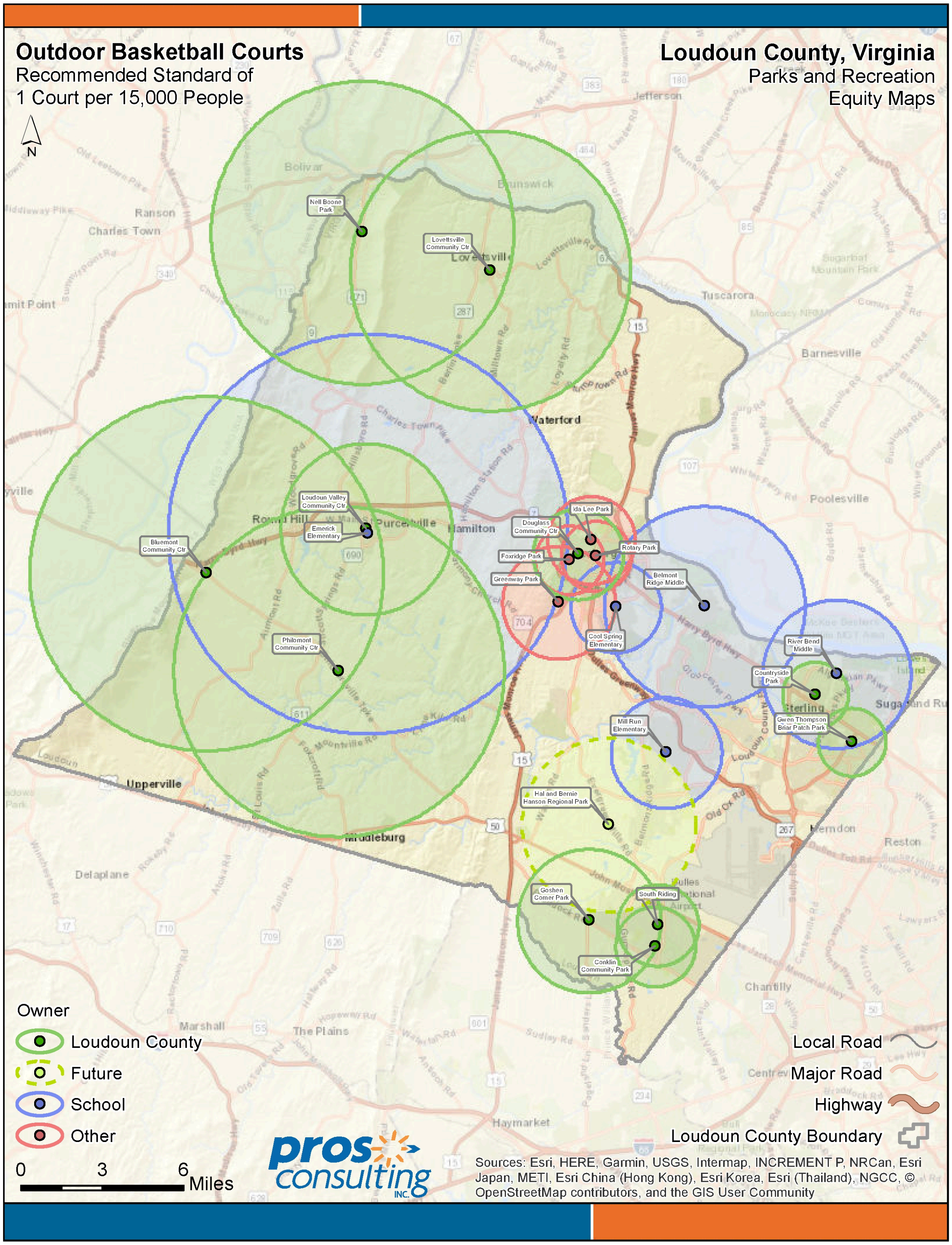
Cricket Fields - Opportunities exist to provide additional cricket fields throughout the County.



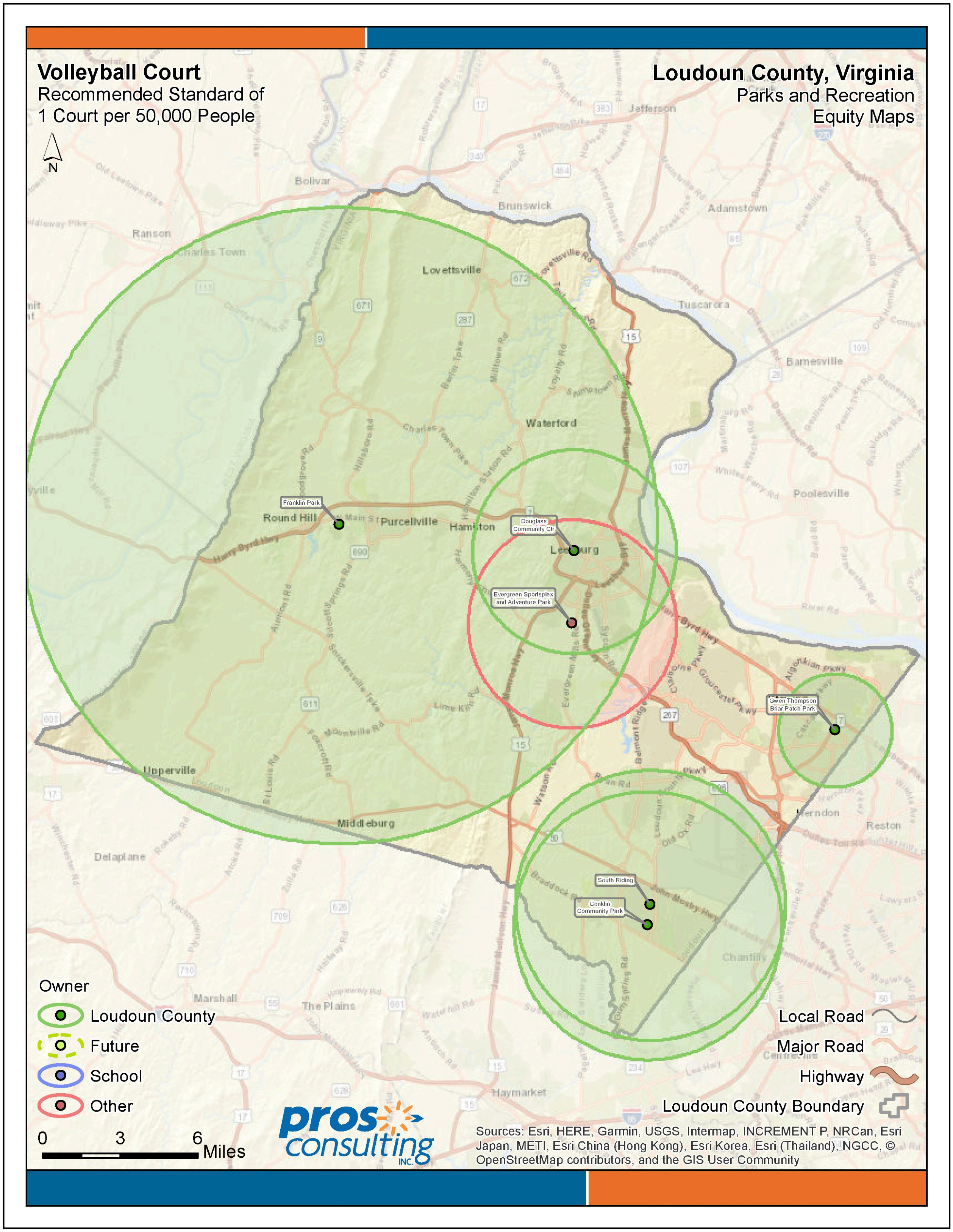
Large Rectangle Field - Lighted - Current and future large lighted rectangular fields will provide adequate equity throughout the County.



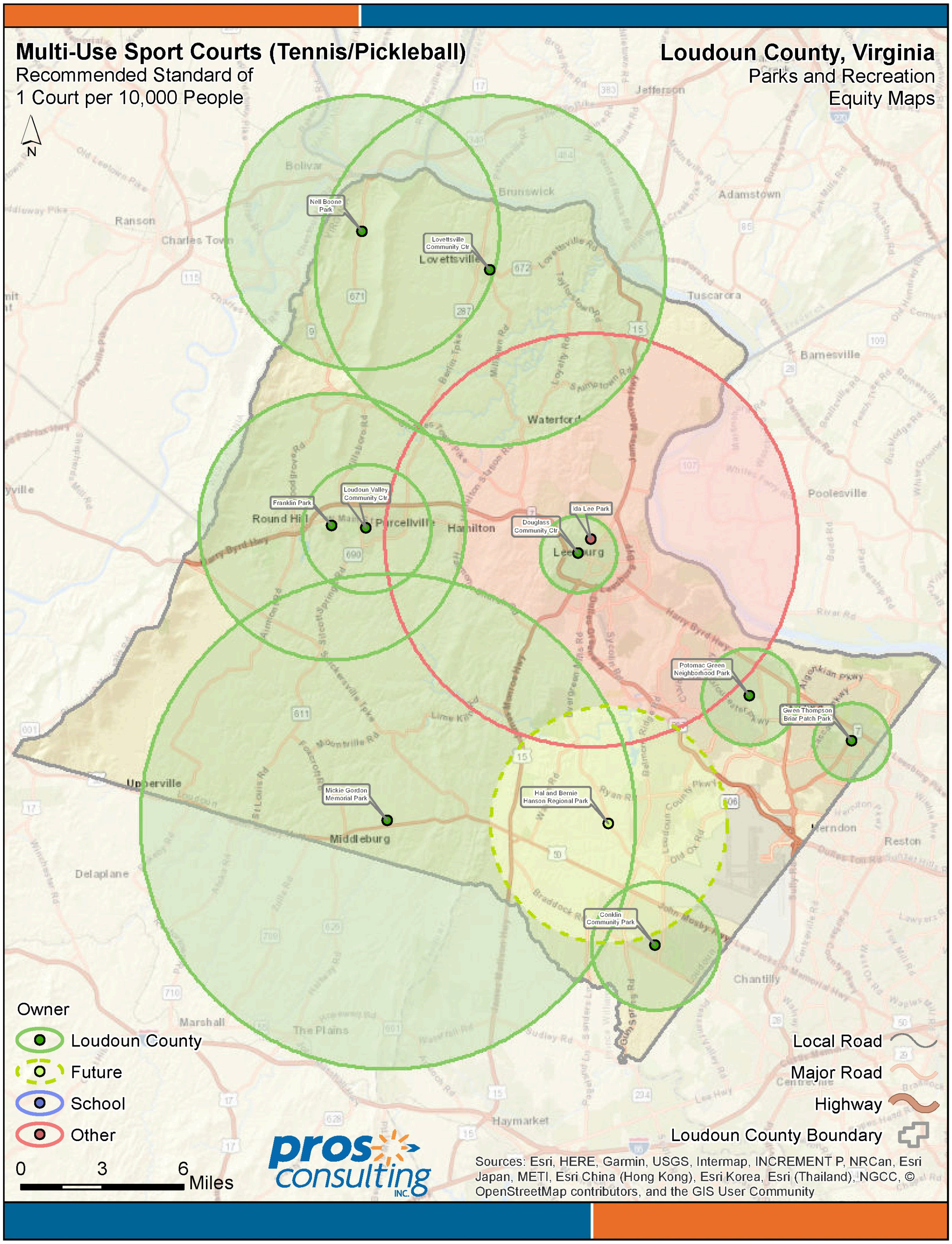
Outdoor Basketball Court - Current and future basketball courts will provide strong geographical equity throughout the County.



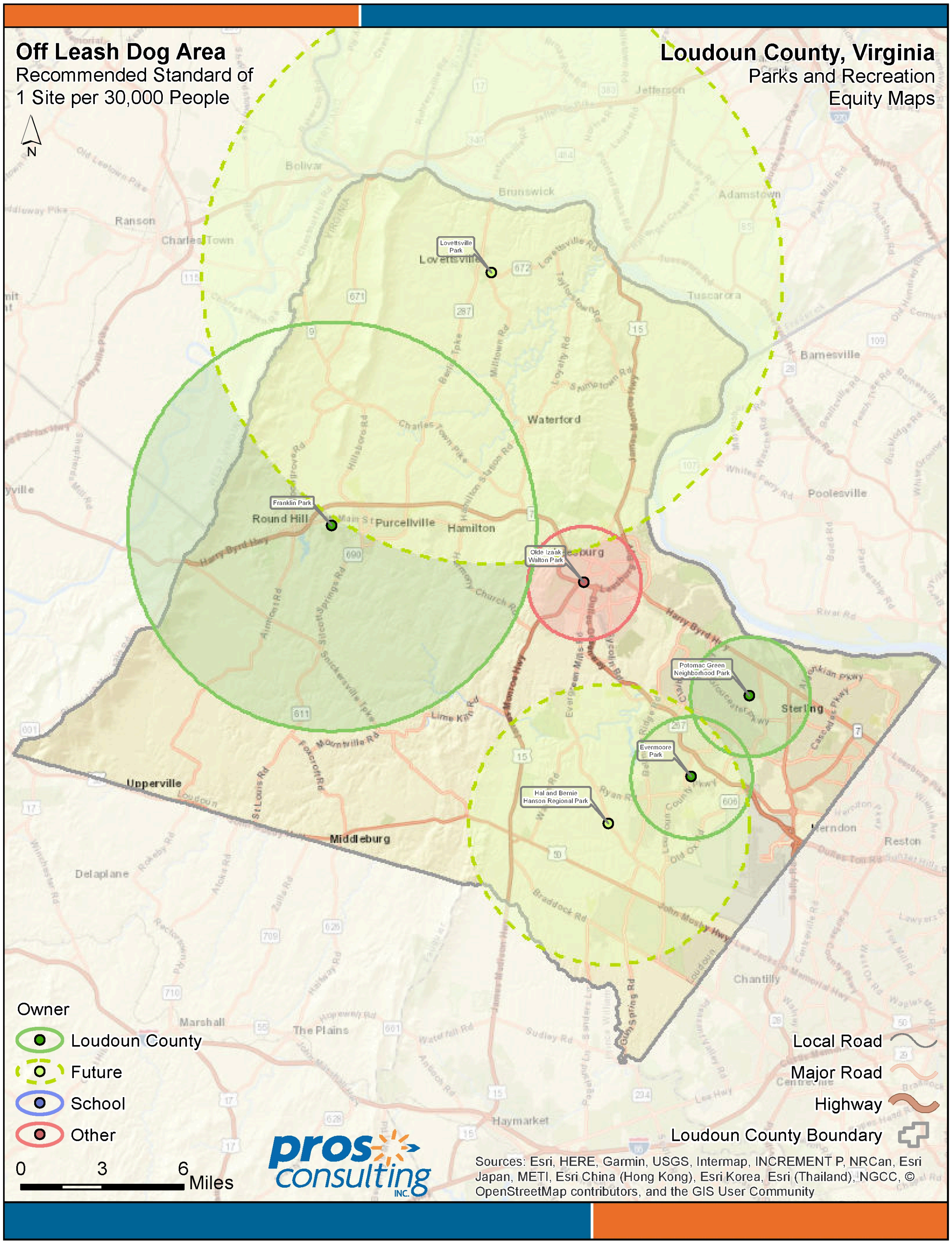
Outdoor Volleyball Court - Current outdoor volleyball courts provide significant adequate equity throughout the County.



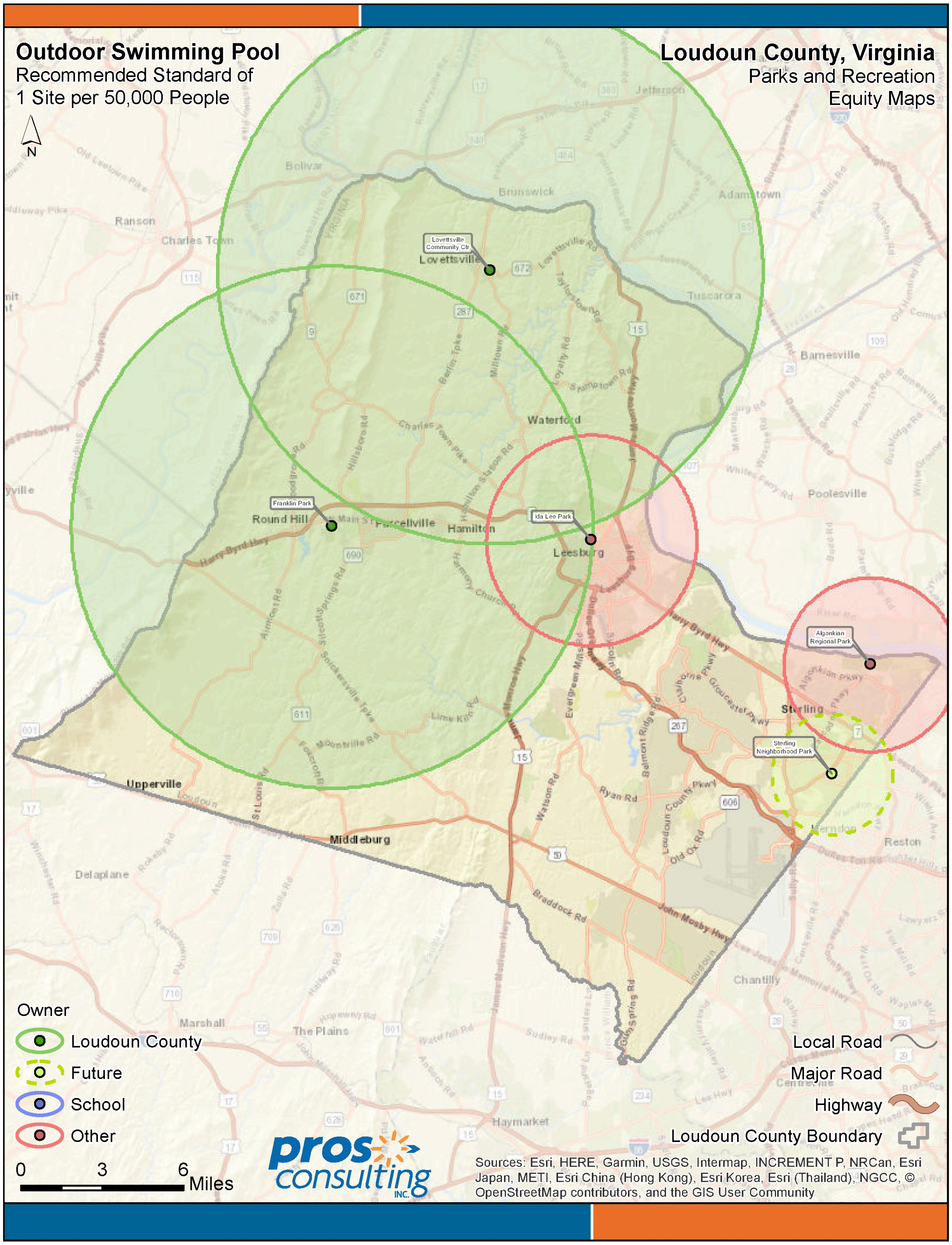
Multi-Use Sport Courts (Tennis/Pickleball) – Given the popularity of tennis and pickleball in the County, opportunity will exist to develop additional courts throughout the County.



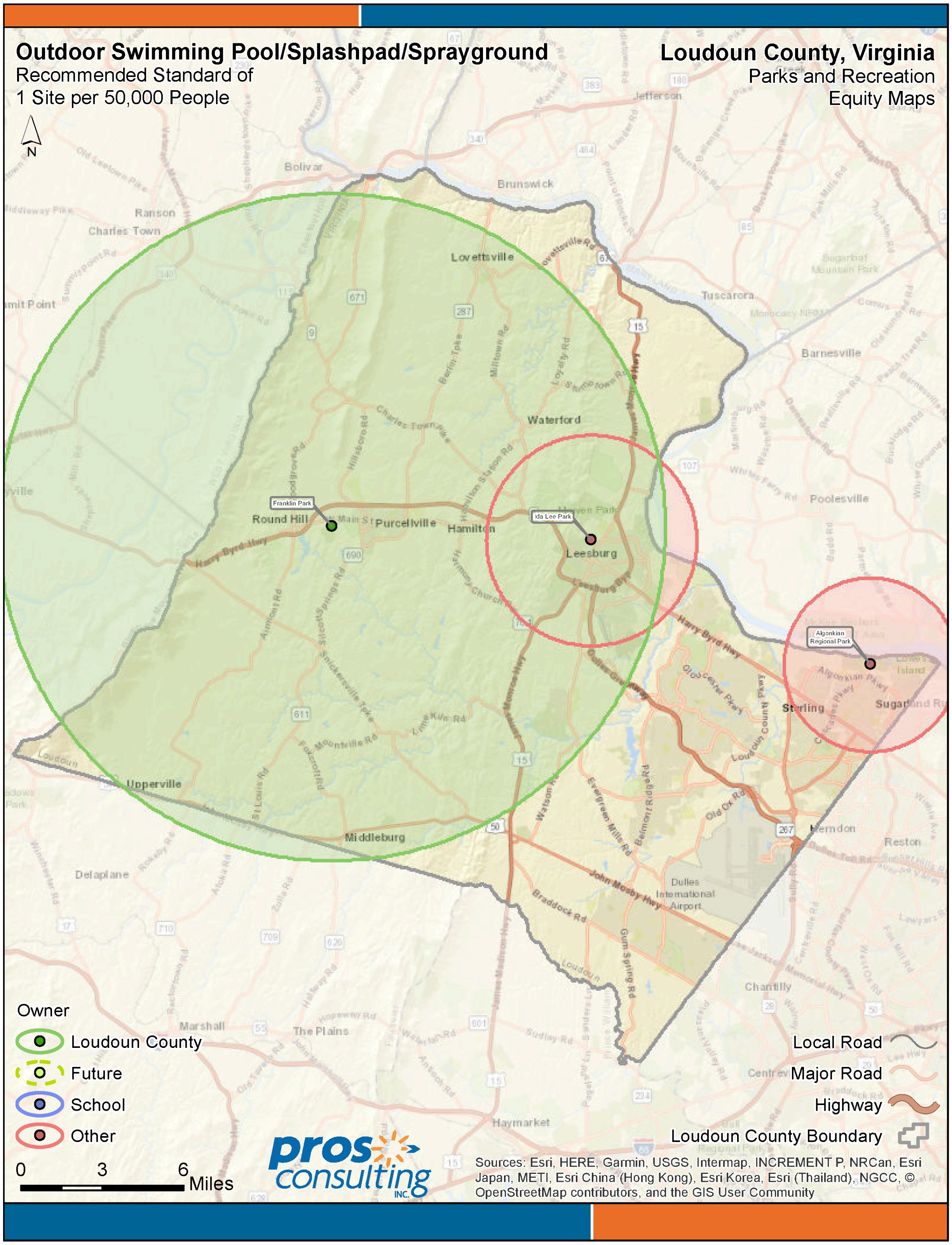
Off Leash Dog Area - Opportunities will exist to add off leash dog areas in Central (Ashburn) and Eastern (Sterling) Loudoun County.



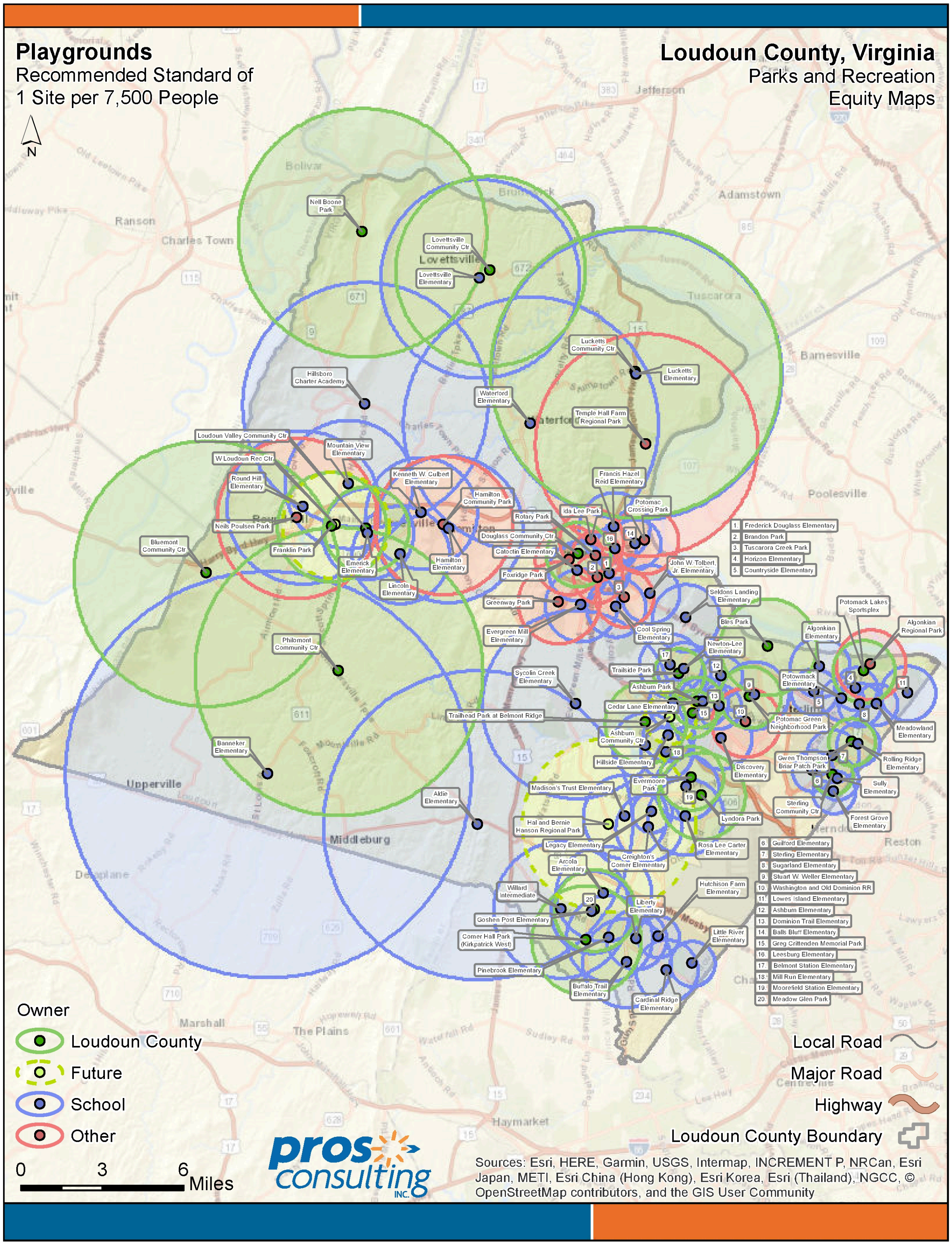
Outdoor Swimming Pools – Opportunities exist to strategically add outdoor swimming pools in areas of the County not served by HOAs.



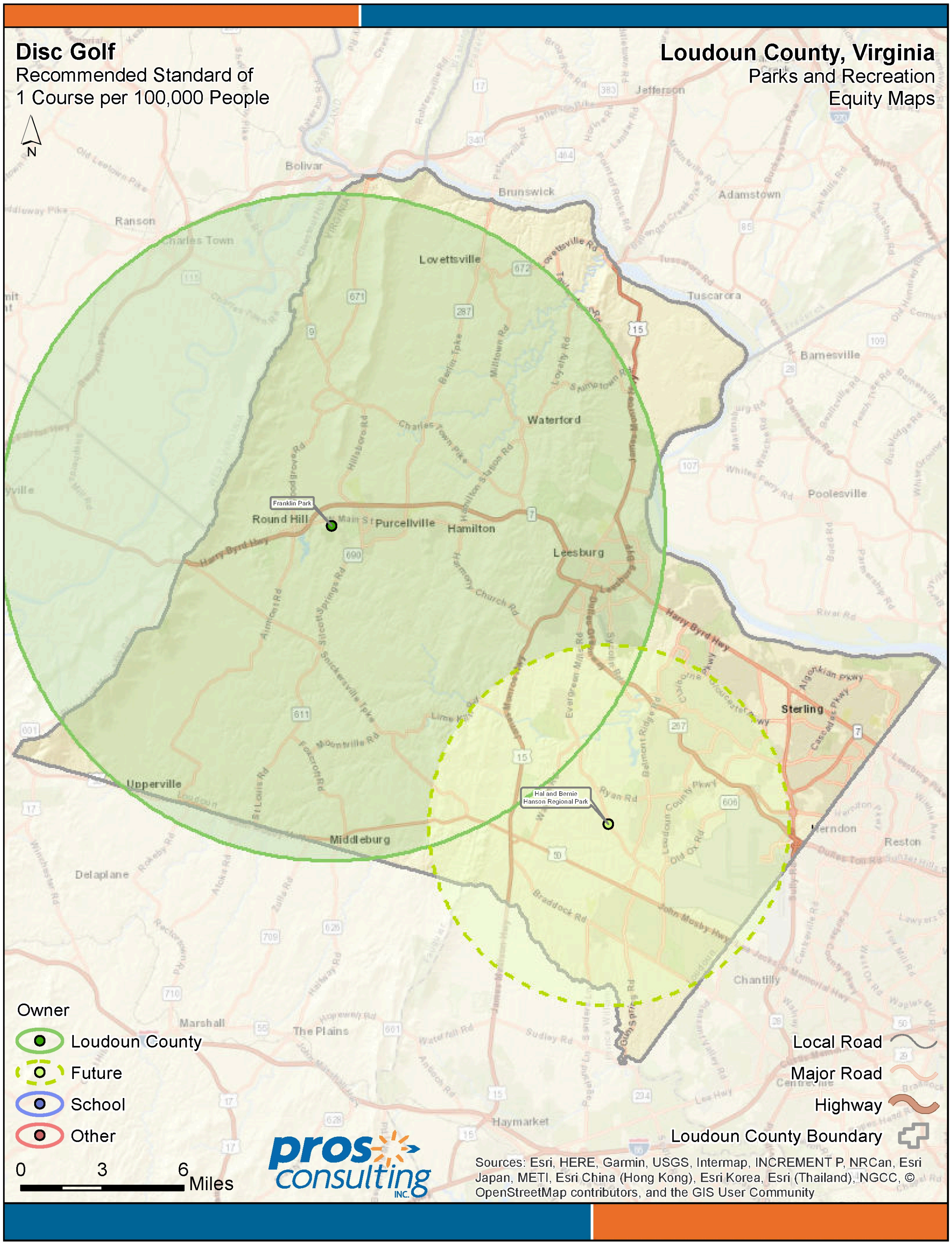
Splashpad/Sprayground - Opportunity exists to add splashpads and/or spraygrounds in the densely populated areas of the Central and Eastern Loudoun County.



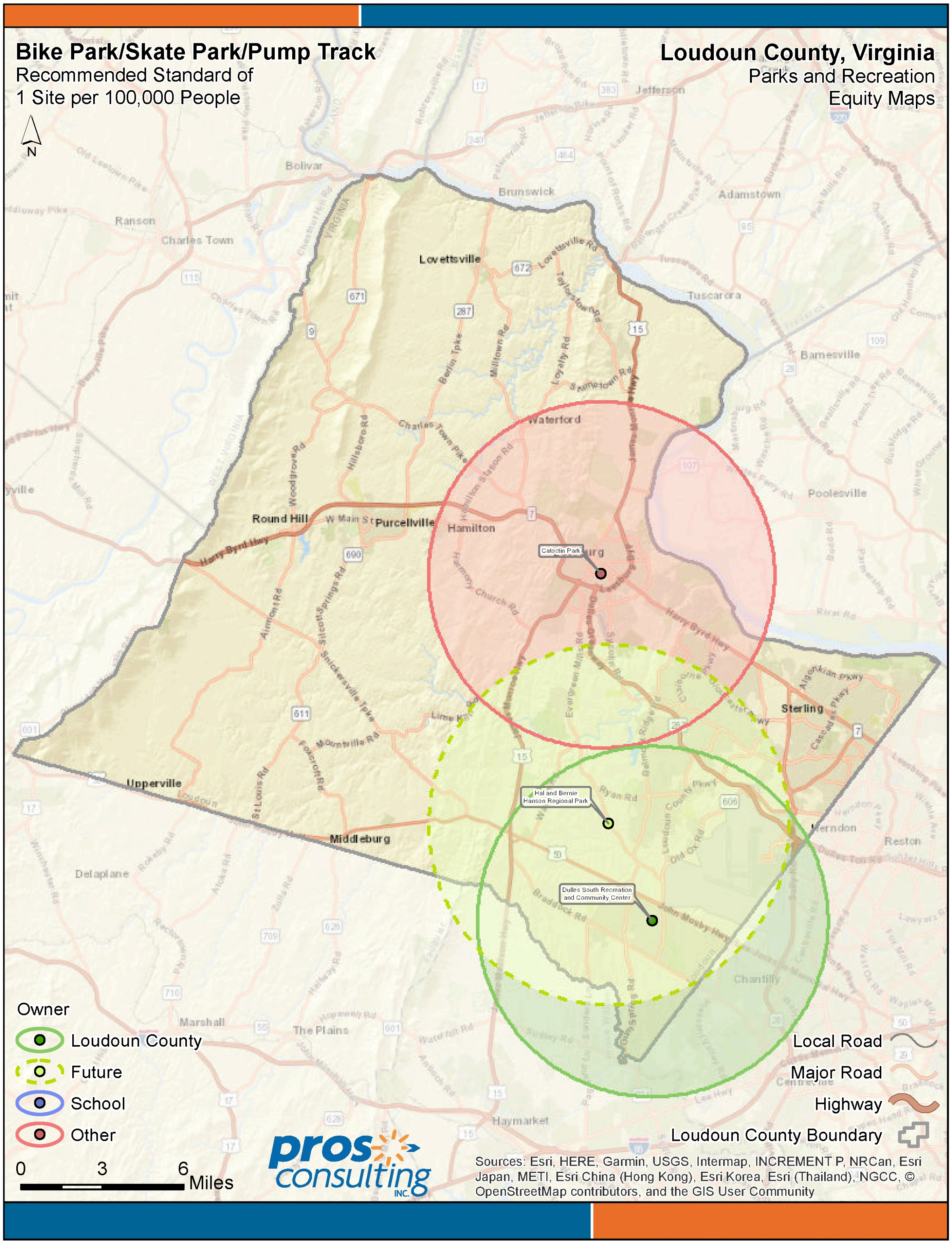
Playgrounds – Significant geographical equity is provided by current and future playground inventory.



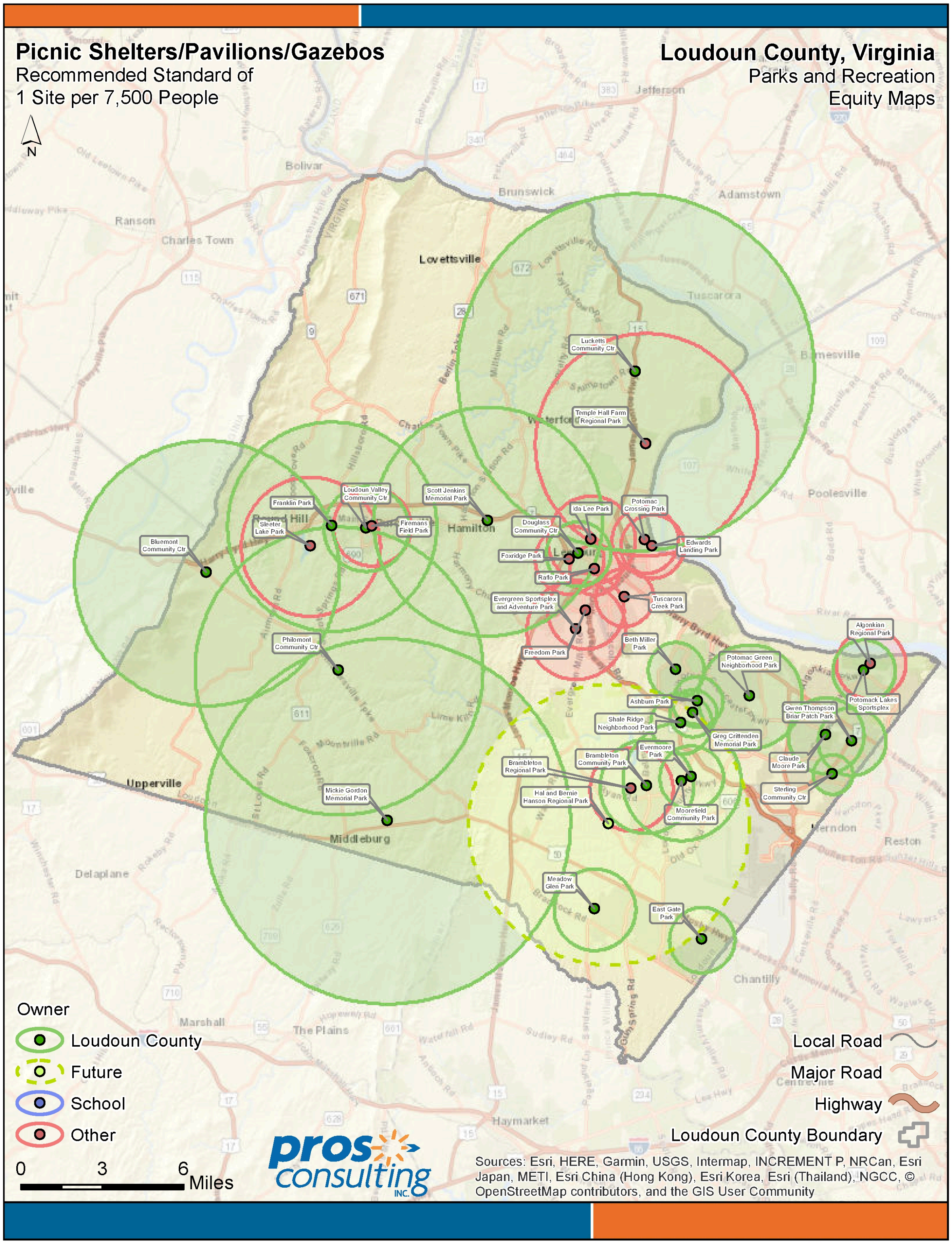
Disc Golf - Opportunities exist to add disc golf courses to provide for better equity for the community.



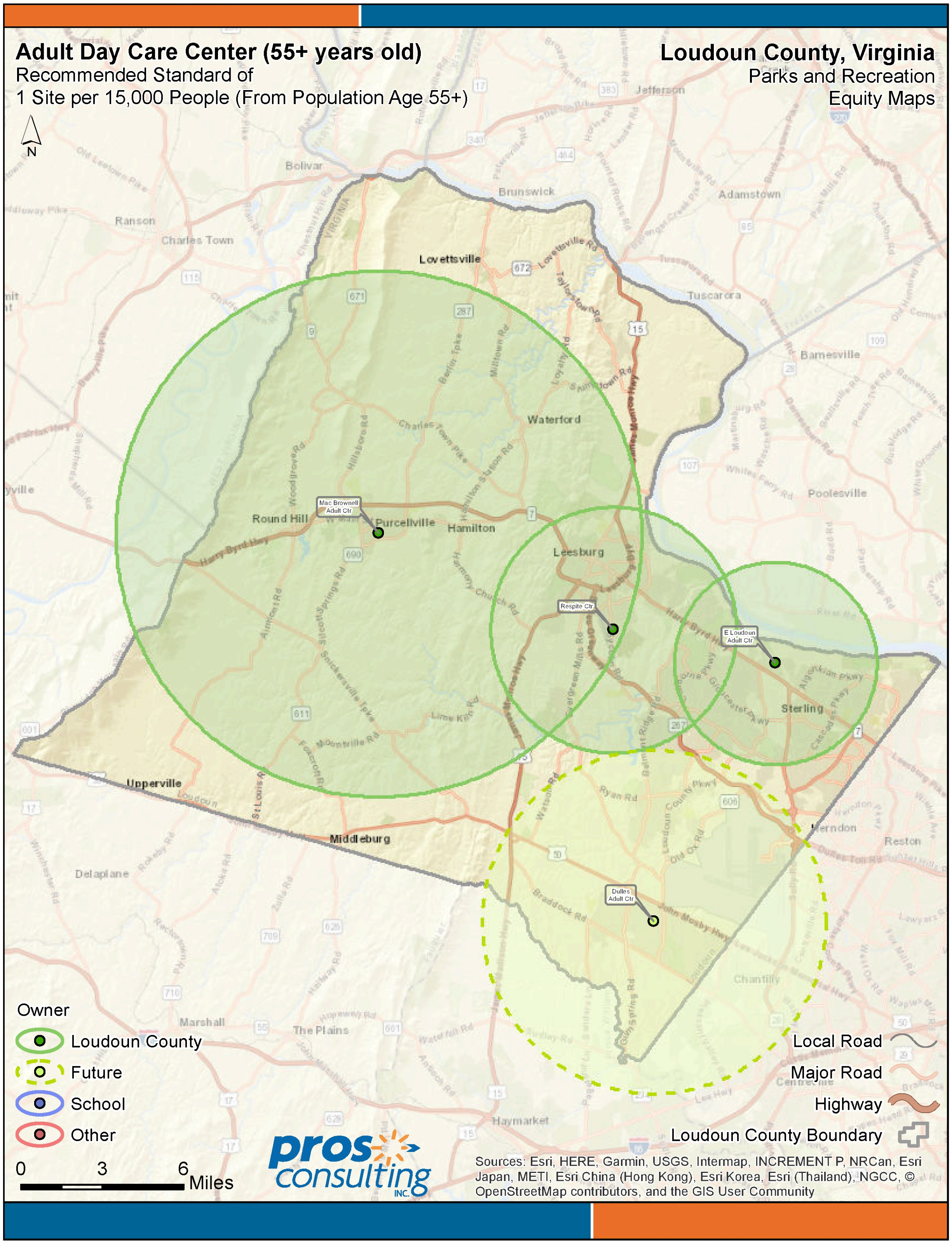
Bike Park/Skate Park/Pump Track - Opportunities exist to add bike parks/skate parks/pump tracks to the Parks, Recreation and Community Services system.



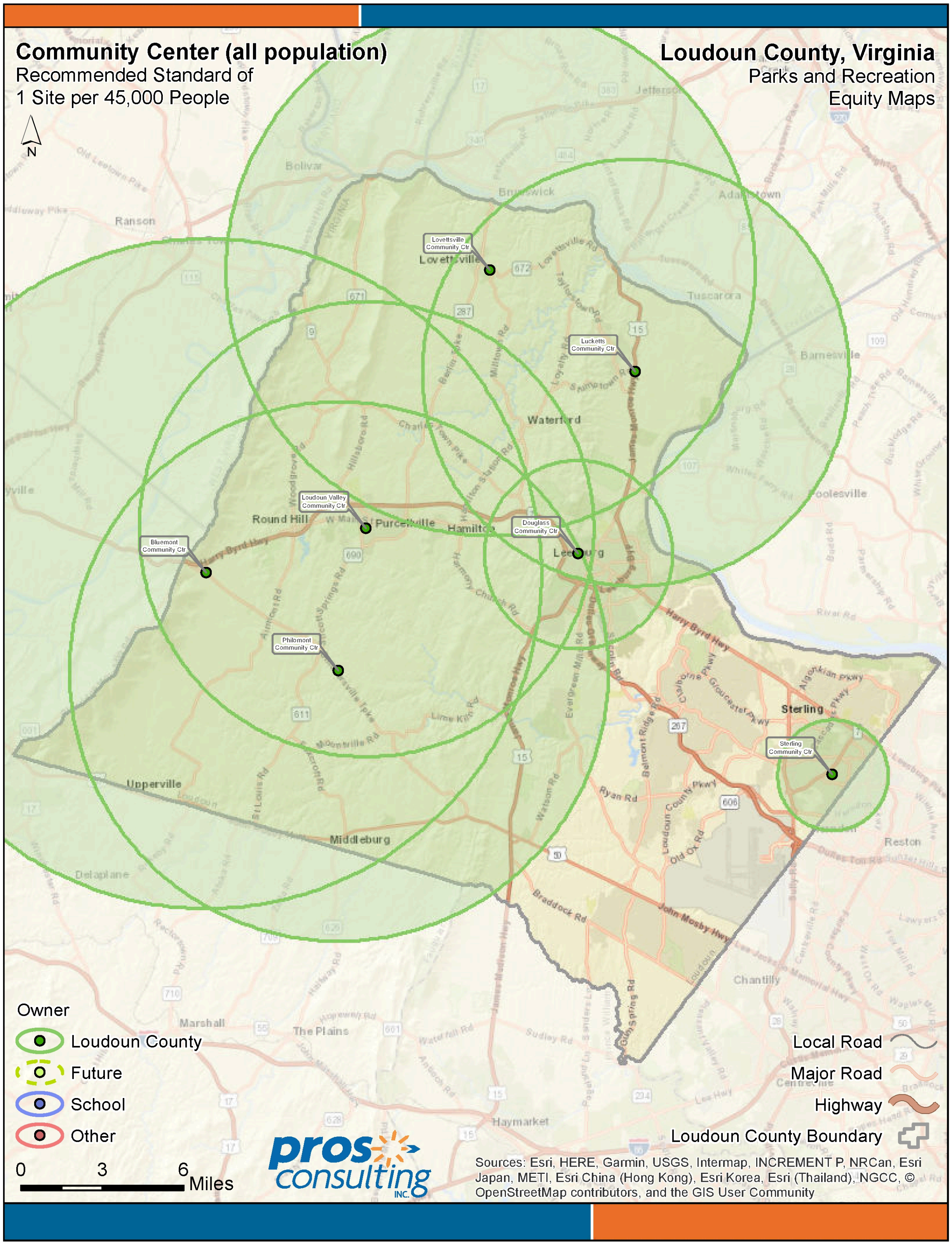
Picnic Shelters/Pavilions/Gazebos – Strong geographical equity is provided by current and future inventory.



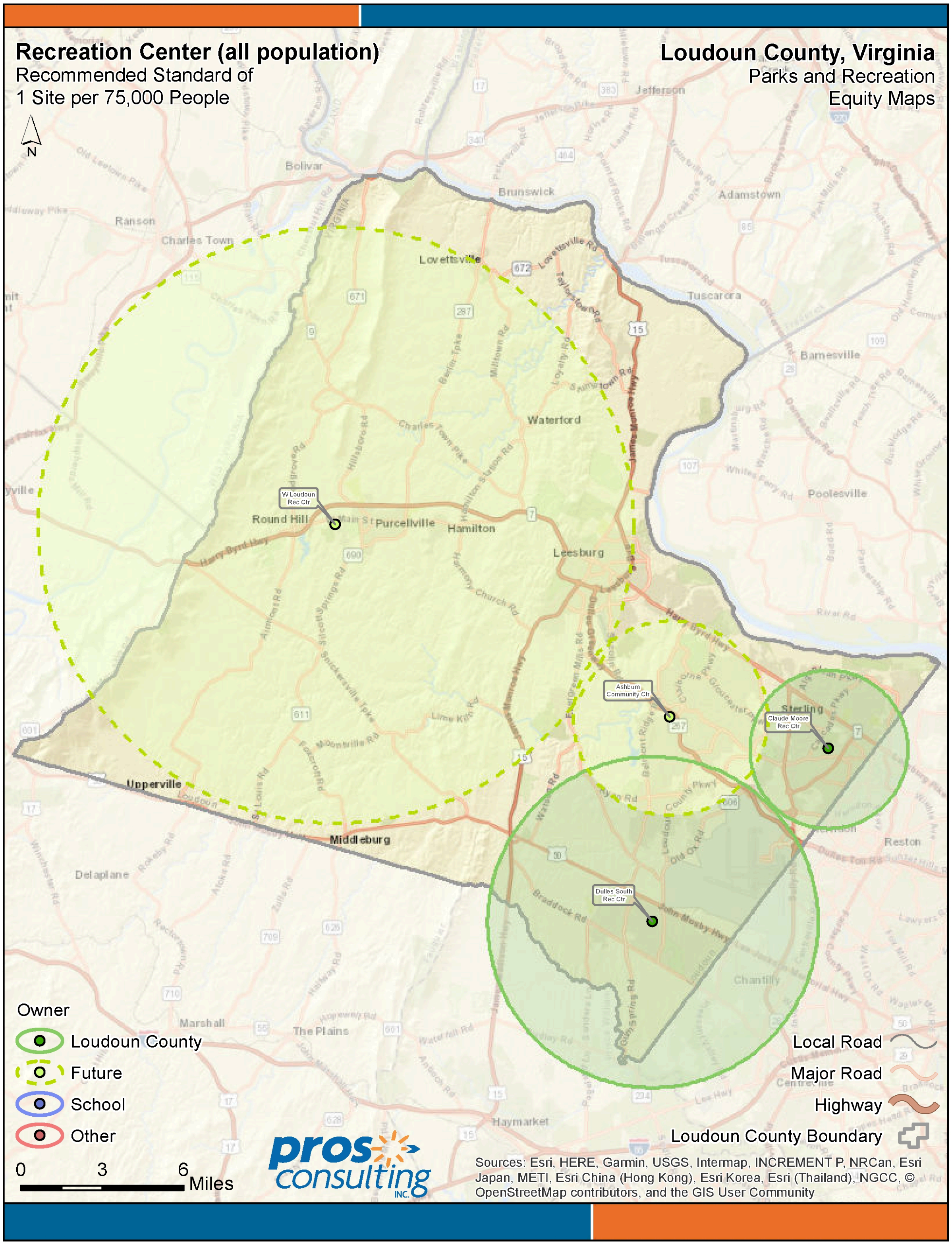
Adult Day Care Centers - Opportunities exist to continue to strategically identify locations for and develop adult day care centers.



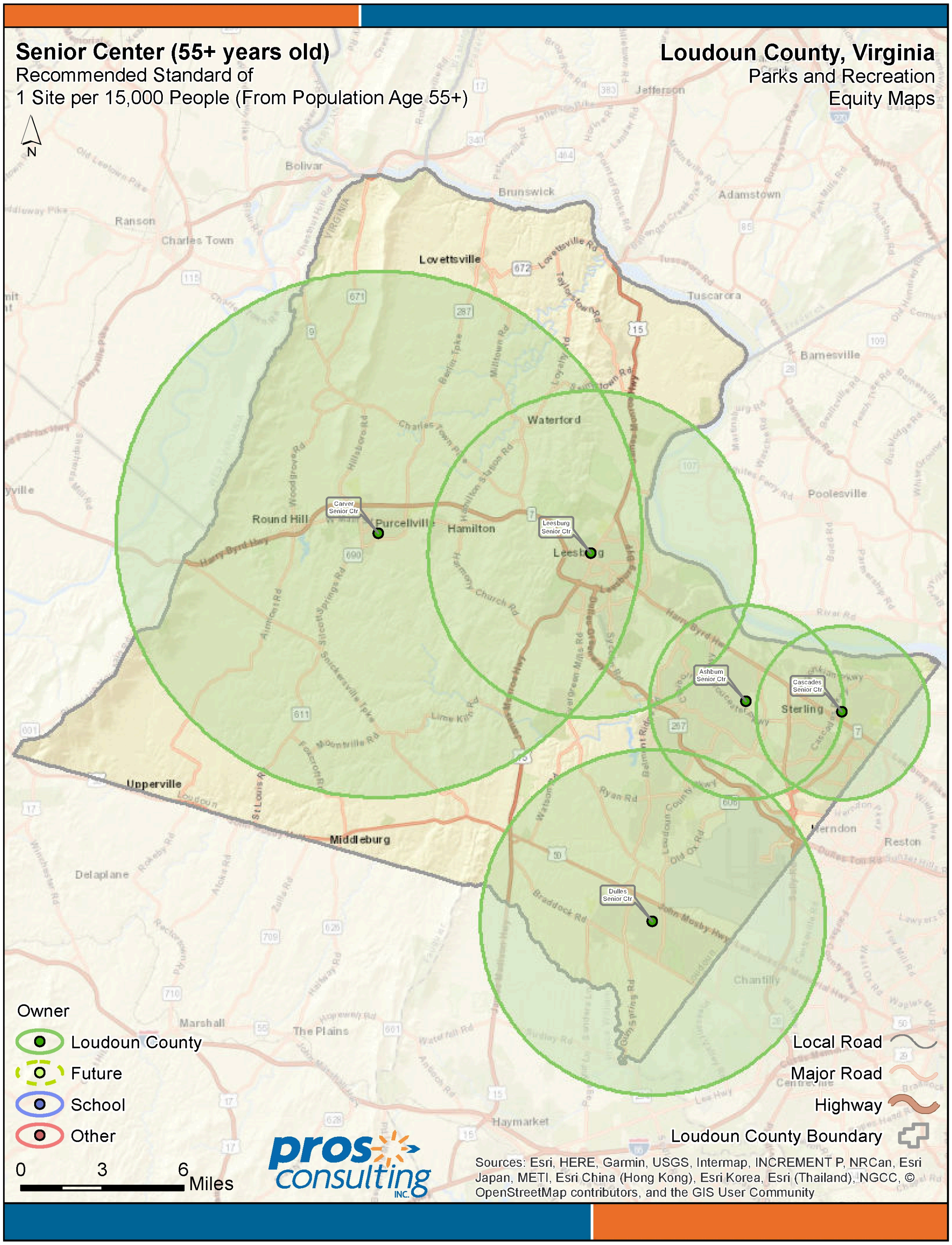
Community Centers - Existing inventory provides strong geographical coverage in the northern, western and central areas of the County.



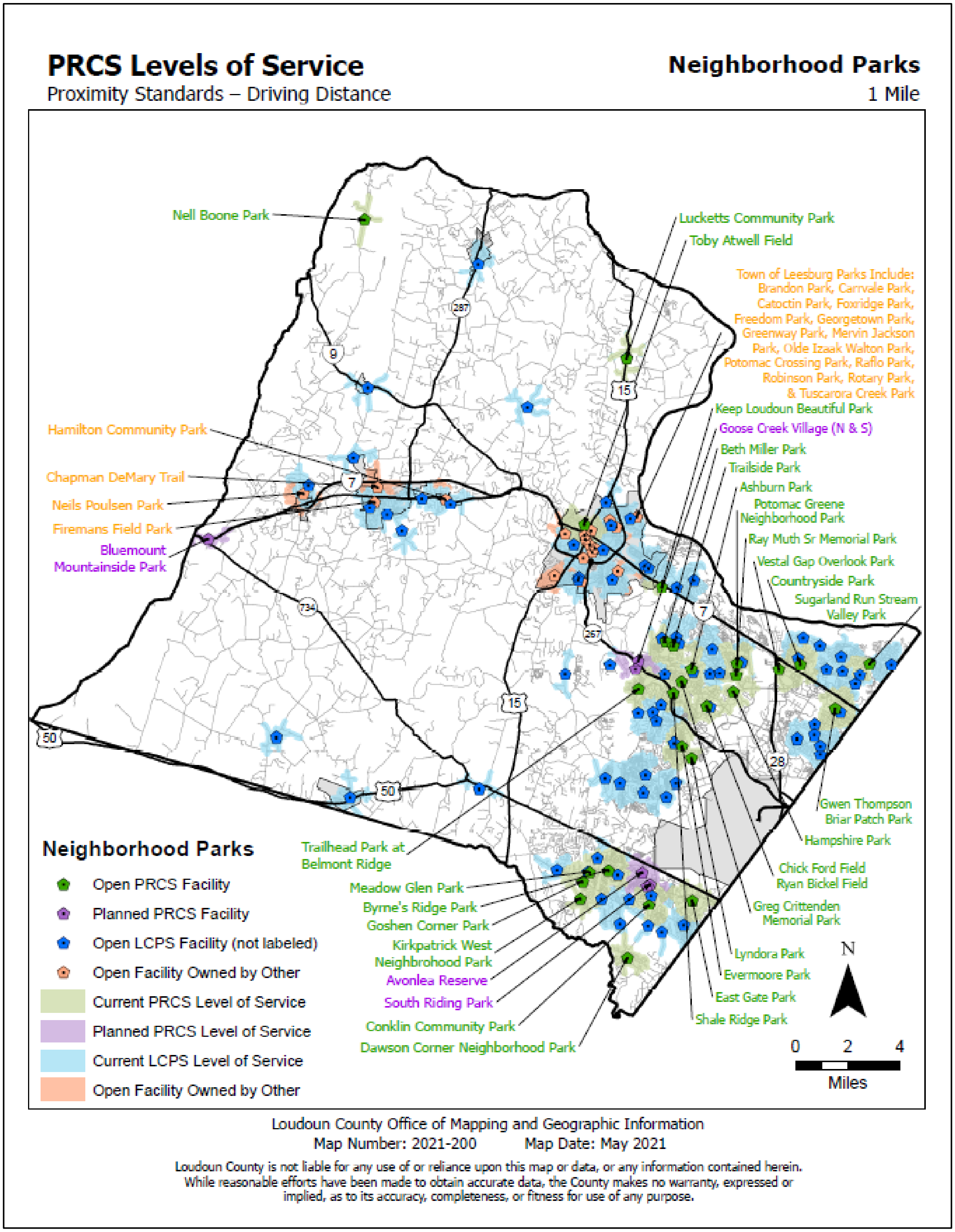
Indoor Recreation Centers- Existing and future recreation centers provide adequate equity for the community.

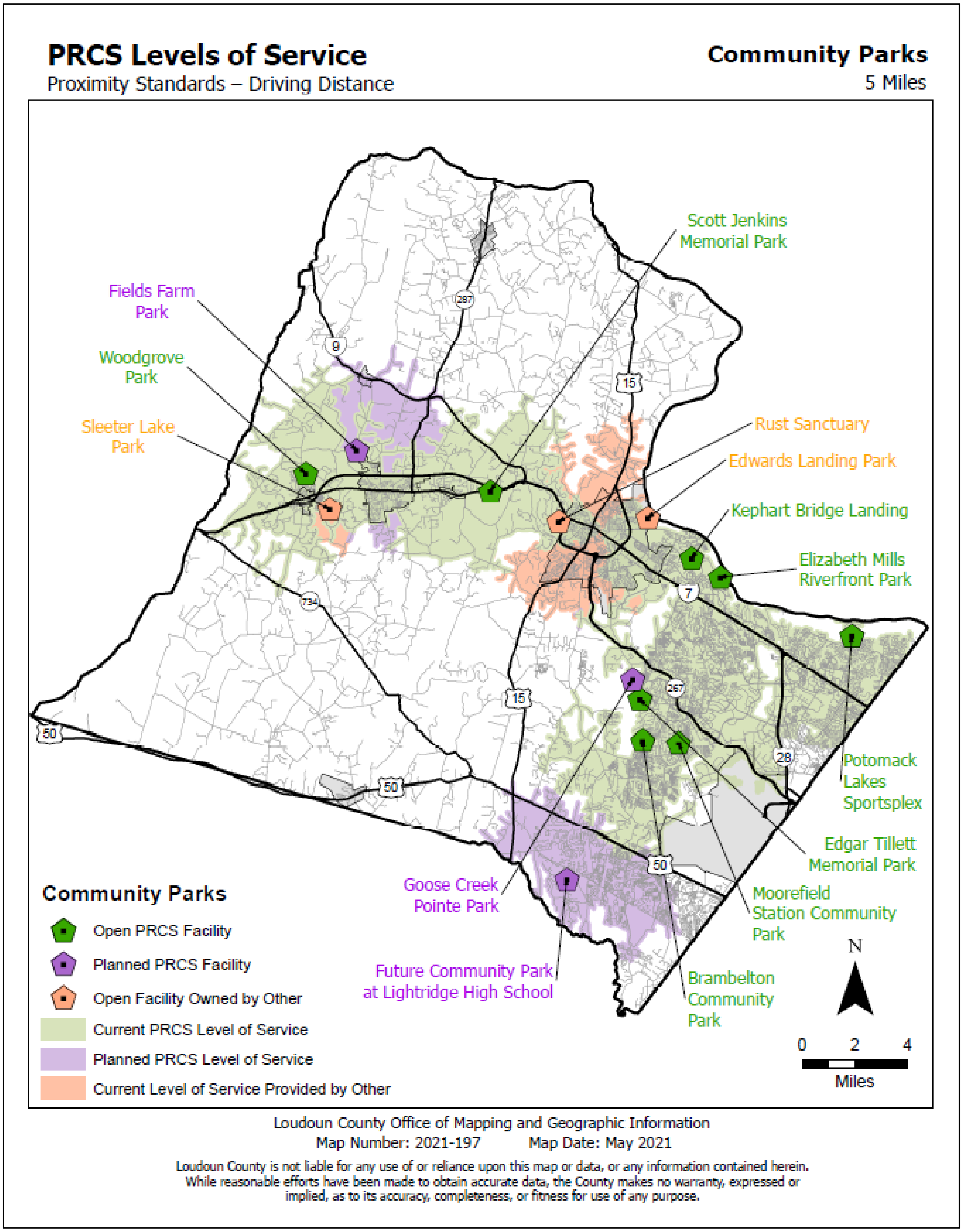


Senior Centers - Existing senior centers provide adequate equity for the community.



APPENDIX E - PROXIMITY STANDARD MAPPING





PRCS Levels of Service
Proximity Standards – Driving Distance
Community Parks
5 Miles
Scott Jenkins Memorial Park
Fields Farm Park
Woodgrove Park
Sleeter Lake Park
Rust Sanctuary
Edwards Landing Park
Kephart Bridge Landing
Elizabeth Mills Riverfront Park
Potomack Lakes Sportsplex
Edgar Tillett Memorial Park
Moorefield Station Community Park
Goose Creek Pointe Park
Future Community Park at Lightridge High School
Brambelton Community Park
287
9
15
7
734
267
28
50
Community Parks
Open PRCS Facility
Planned PRCS Facility
Open Facility Owned by Other
Current PRCS Level of Service
Planned PRCS Level of Service
Current Level of Service Provided by Other
N
0 2 4
Miles
Loudoun County Office of Mapping and Geographic Information
Map Number: 2021-197 Map Date: May 2021
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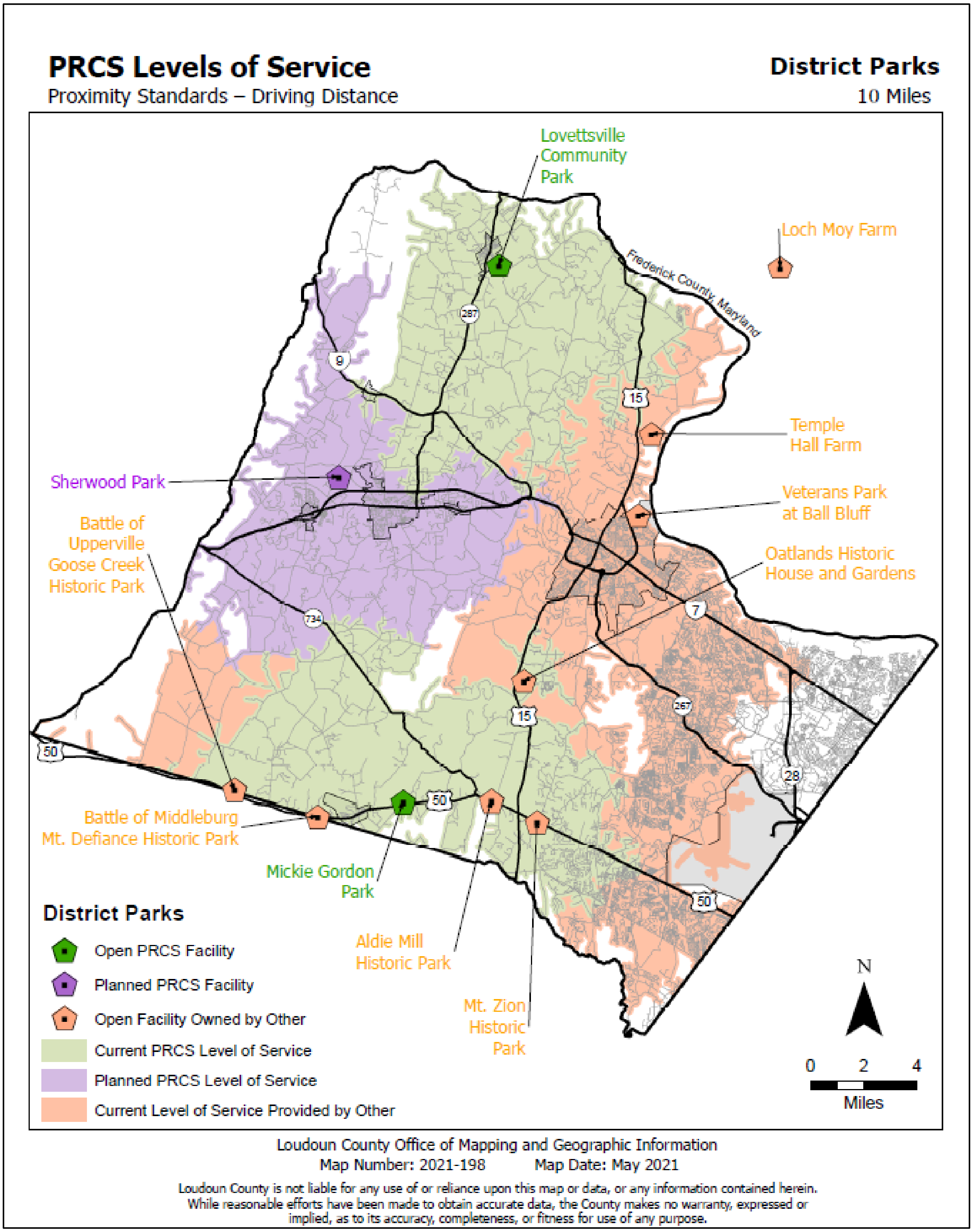

PRCS Levels of Service
Proximity Standards – Driving Distance
District Parks
10 Miles
Lovettsville Community Park
Loch Moy Farm
Frederick County, Maryland
Temple Hall Farm
Sherwood Park
Veterans Park at Ball Bluff
Battle of Upperville Goose Creek Historic Park
Oatlands Historic House and Gardens
Battle of Middleburg Mt. Defiance Historic Park
Mickie Gordon Park
Aldie Mill Historic Park
Mt. Zion Historic Park
District Parks
Open PRCS Facility
Planned PRCS Facility
Open Facility Owned by Other
Current PRCS Level of Service
Planned PRCS Level of Service
Current Level of Service Provided by Other
N
0 2 4
Miles
Loudoun County Office of Mapping and Geographic Information
Map Number: 2021-198 Map Date: May 2021
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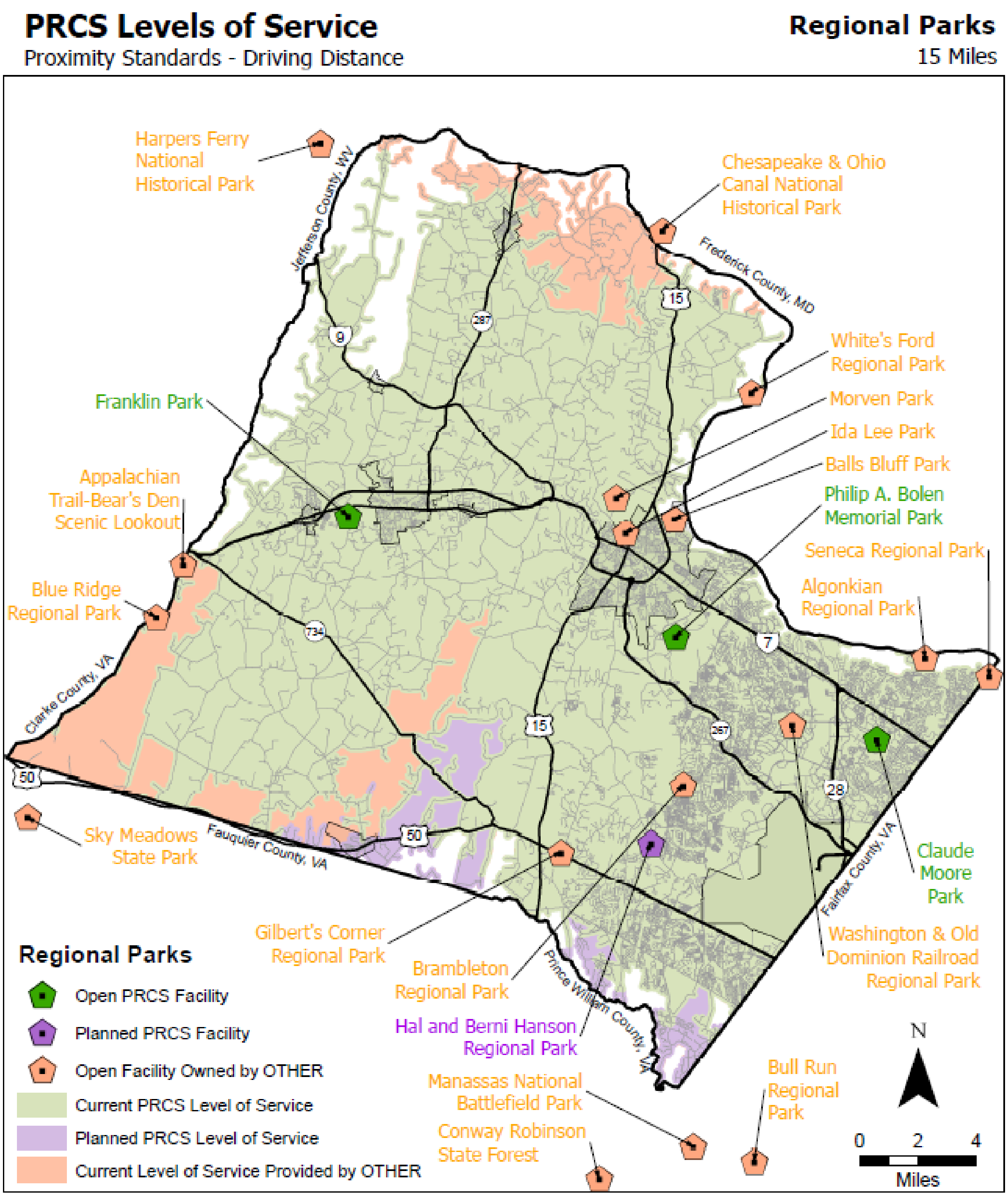

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Map Number: 2021-202 Map Date: May 2021