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Park Users, Use Levels, and Market Demand

4 Park Users, Use Levels, and Market Demand

4.1 Recreation and Park Demographic Profile

By analyzing population data, trends emerge that can inform decision making and resource allocation strategies for the provision of parks, recreation, and open space management. This demographic profile was compiled in August 2019 from a combination of sources including the ESRI Business Analyst, American Community Survey, and U.S. Census. The following topics will be covered in detail in this report:

- Population Summary
- Gender and Age Distribution
- Race/Ethnic Character
- Educational Attainment
- Household Data

For the purposes of this study, the market area is defined as a 20-minute drive from Prado Regional Park. In Figure 4-1, the dark purple core represents the regional market area. The image to the right shows a close-up map with the center point being Prado Regional Park within a 20-minute drive (see additional information on market areas later in this Chapter). Drive time utilized current street and highway networks assuming a congested level, where only 75% of the speed limit is assumed to occur on freeways and highways. These areas are determined by following networks at 75% of the posted speeds, thereby producing irregular networks versus the more traditional radius circles. This approach is much more accurate and matches actual travel patterns better.



Regional Market Area - 100 mile



Expanded Community Market Area - 20-Minute Drive from Prado Regional Park

Figure 4-1: Market Area

4.1.1 Population

In 2000, the market area population totaled over 401,000 people according to the U.S. Census; it grew at a rate of 1.75 percent between 2000 and 2010. In 2019, the population within a twenty-minute drive of Prado Regional Park is approximately 541,000. The population is expected to grow 1.10 percent between 2019 and 2024, reaching over 571,000 in 2024. This growth rate is faster than is expected in California, at 0.67 percent between 2019 and 2024.

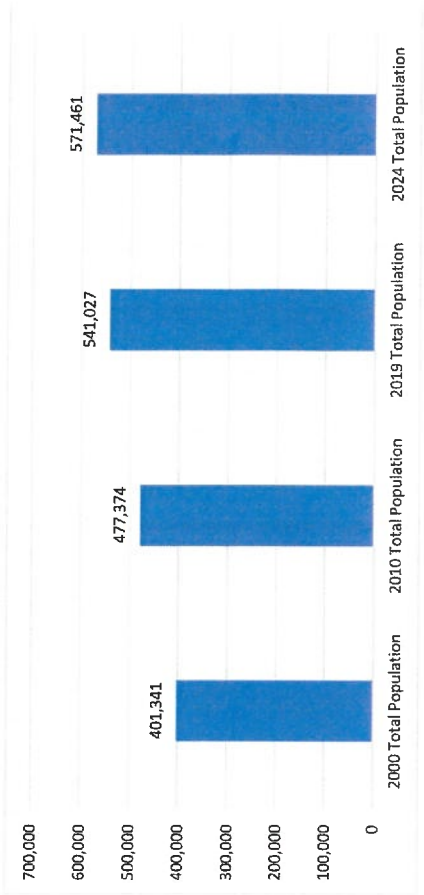


Figure 4-2: Projected Population Trends from 2000 to 2024



4.1.2 Age and Gender Distribution

The market area surrounding Prado Regional Park has a balance between gender—with approximately 50 percent female and male. This is reflective of the state of California and the United States.

Table 4-1: Prado Regional Park Gender Distribution Compared to State and National Averages

	Market Area	California	USA
2019 Female Population (%)	49.83%	50.28%	50.75%
2019 Male Population (%)	50.17%	49.72%	49.25%

The median age in the market area in 2010 was 32.4 years old, younger than the State of California with a median age of 35 years old. The median age in the market area is expected to increase over time.



Figure 4-3: Median Age of Prado Regional Park between 2010 and 2024

Looking at the population age breakdown by five-year increments in the figure below, there are a few key conclusions.

- Age groups in the market area are evenly distributed between the ages of 0 and 59, with each age group making up between 6 and 8 percent of the population. Age groups older than 60 steadily decline from 5 percent of the population to less than one percent for those older than 80.
- The age distribution is expected to stay relatively the same from 2010 to 2024. The biggest changes expected are for the following age cohorts: 15 to 19 years, 30 to 34 years, and 45 to 49 years, which are all expected to increase approximately 2 percentage points.

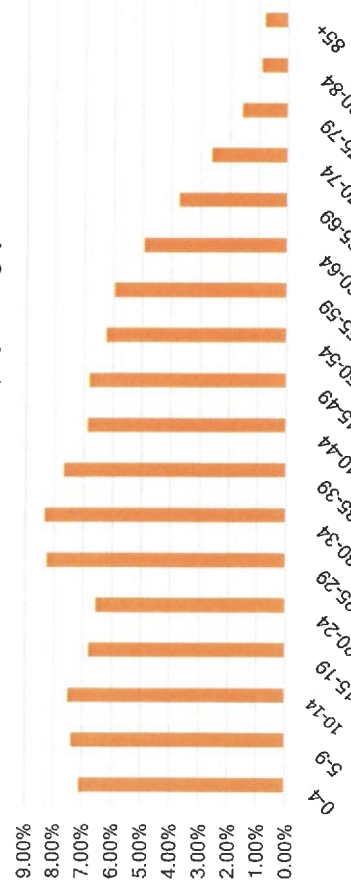
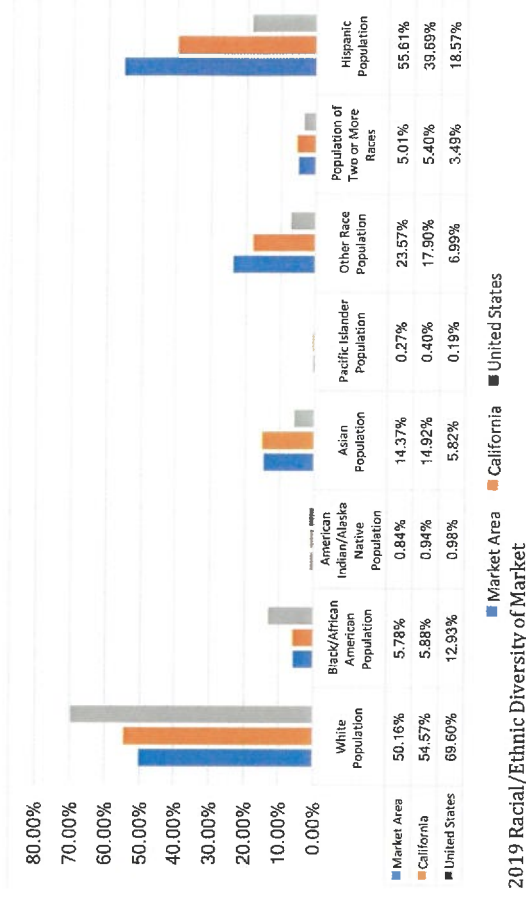


Figure 4-4: 2019 Age Distribution in Prado Regional Park

4.1.3 Race/Ethnic Character

In the United States, communities are generally becoming more diverse. Before comparing this data, it is important to note how the U.S. Census classifies and counts individuals who identify as Hispanic. The Census notes that Hispanic origin can be viewed as the heritage, nationality, lineage, or country of birth of the person or the person's parents or ancestors before arrival in the United States. In the U.S. Census, people who identify as Hispanic, Latino, or Spanish are included in all of the race categories. The graphic below reflects the approximate racial/ethnic population distribution.

- The market area was very reflective of the state of California, with similar demographic makeup in all race categories.
- There are significantly more residents in the market area that identify as Hispanic (56%) than California (40%) and the United States (18%).
- Almost a quarter of respondents stated that they identify as "some other race," while 15 percent identified as Asian.



4.1.4 Educational Attainment

Analyzing the highest levels of educational attainment indicates that the market area had the lowest percentage of those who obtained a graduate/professional level degree (9%), compared to California (13%) and the United States (20%). Over twenty percent of residents had completed high school or received their GED.

Table 4-2: 2019 Educational Attainment

Level of Education	Market Area	California	USA
Less than 9th Grade	8.71%	8.95%	5.22%
9-12th Grade/No Diploma	9.22%	7.26%	7.07%
High School Diploma	20.96%	18.58%	23.00%
GED/Alternative Credential	2.77%	2.25%	12.18%
Some College/No Degree	23.07%	21.00%	4.00%
Associates Degree	8.09%	7.77%	20.52%
Bachelor's Degree	18.61%	21.35%	8.00%
Graduate/Professional Degree	8.57%	12.84%	19.60%

4.1.5 Household Data

The median household income in the market area in 2019 is \$82,229, compared to the state of California at \$74,520.

The median home value in the market area is \$918,677, higher than the median home value of California overall (\$394,012) and the United States (\$218,492).

The average household size is 3.56 in the market area, compared to 2.92 in California and 2.59 in the United States.

About 9 percent of households in the market area receive food stamps, the same rate as California. Approximately 22 percent of residents live with some sort of hearing, vision, cognitive difficulty, ambulatory, self-care, and/or independent living difficulty. This is lower than the national average (25%).

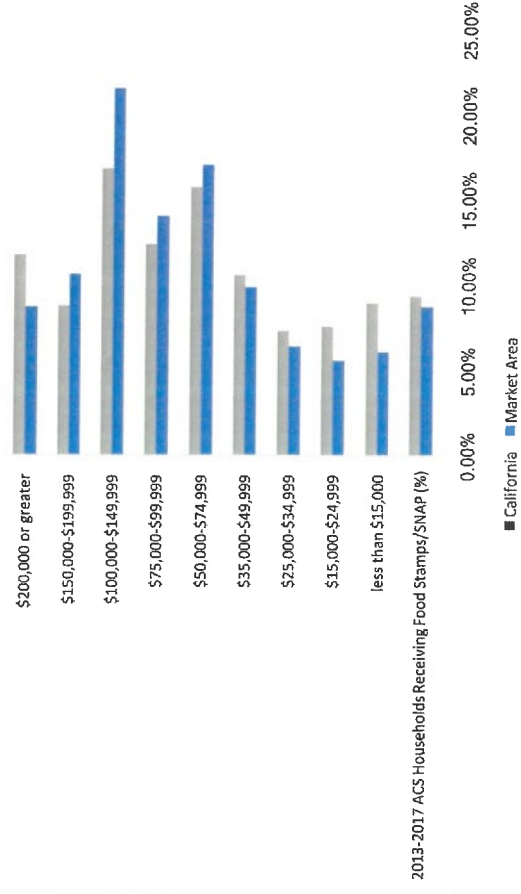


Figure 4-5: Median Household Income

4.1.6 Employment

- Roughly 61 percent of the population is employed in white collar positions, which typically performs managerial, technical, administrative, and/or professional capacities. Approximately 24 percent were employed by blue collar positions, such as construction, maintenance, etc.
- Approximately 5.9 percent of the population was unemployed in 2019, compared to the United States (4.8%).
- In terms of commuting, about 20 percent of workers spend seven or more hours commuting back and forth to work each week, and 78 percent of commuters drive alone in a car to work.

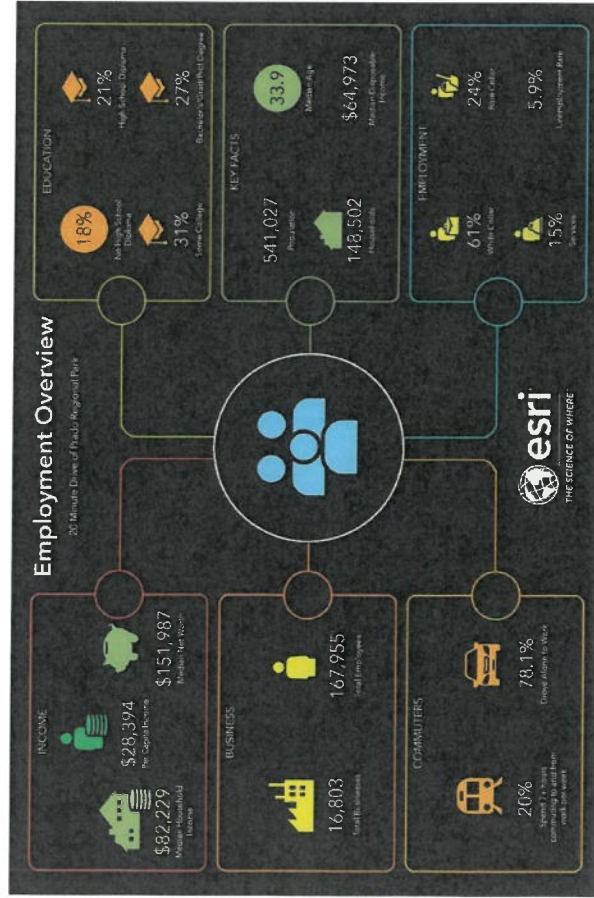


Figure 4-6: Employment Overview

4.1.7 Health Rankings

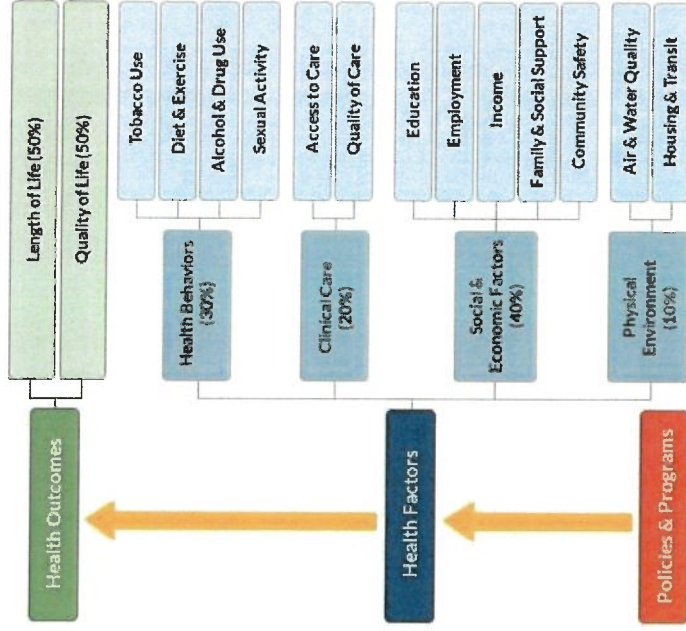


Figure 4-7: County Health Ranking. Source: Robert Wood Johnson Foundation.

Understanding the status of the community's health can help inform policies related to recreation and fitness. Robert Wood Johnson Foundation's County Health Rankings and Roadmaps provide annual insight on the general health of national, state, and county populations. The 2019 Rankings model shown in Figure 4-7 highlights the topic areas reviewed by the Foundation.

The health ranking measures the health of the population based on “how long people live and how healthy people feel while alive,” coupled with ranking factors including healthy behaviors, clinical care, social and economic, and physical environment factors.¹



4.1.8 State Health Ranking

In 2019, the United Health Foundation's *America's Health Rankings Annual Report* ranked California as the 12th healthiest state nationally. The health rankings consider and weigh social and environmental factors that tend to directly impact the overall health of state populations as illustrated in Figure 4-8. The state moved up five positions in the ranking since 2017.



Figure 4-8: 2019 California Health Ranking Overview



Source: United Health Foundation's America's Health Rankings Annual Report 2018

4.2 Influencing Trends of Recreation and Users

The changing pace of today's world requires analyzing recreation trends from both a local and national level. Understanding the participation levels of the market area residents using data from the U.S. Census Bureau, combined with research of relevant national recreation trends, provides critical insights that help to plan for the future of parks and recreation. These new shifts of participation in outdoor recreation, sports, and cultural programs are an important component of understanding and serving the agency's community. The market area is defined as a 20-minute drive from Prado Regional Park.

4.2.1 Local Recreational Expenditure

Data from the Bureau of Labor Statistics provides insights about consumer expenditures per household in 2019. The following information was sourced from ESRI Business Analyst, which provides a database of programs and services where market area residents spend their money. The table below shows the average dollars spent on various recreational products/services. Money spent related to sports, recreation, and exercise equipment generated the highest expenditures of \$38.2 million 2019

Table 4-3: 2019 Recreational Expenditures in Market Area

Variable	Average	Total
Winter Sports Equipment	\$7.90	\$1,172,823
Water Sports Equipment	\$10.06	\$1,493,694
Bicycles	\$37.37	\$5,549,887
2019 Hunting & Fishing Equipment	\$86.90	\$12,905,353
Toys/Games/Crafts/Hobbies	\$137.90	\$20,478,010
Sports/Rec/Exercise Equipment	\$257.47	\$38,234,533
Fees for Participant Sports excluding Trips	\$135.00	\$5,256,584

4.2.2 Outdoor Recreation Behavior

In Figure 4-9, data from ESRI Business Analysts shows popular outdoor recreation activity participation by households in the market area. Compared to the state, the market area had higher participation in the following activities:

- Road Biking (11%)
- Power Boating (5%)
- Fresh Water Fishing (9%)
- Golf (9%)
- Hiking (14%)

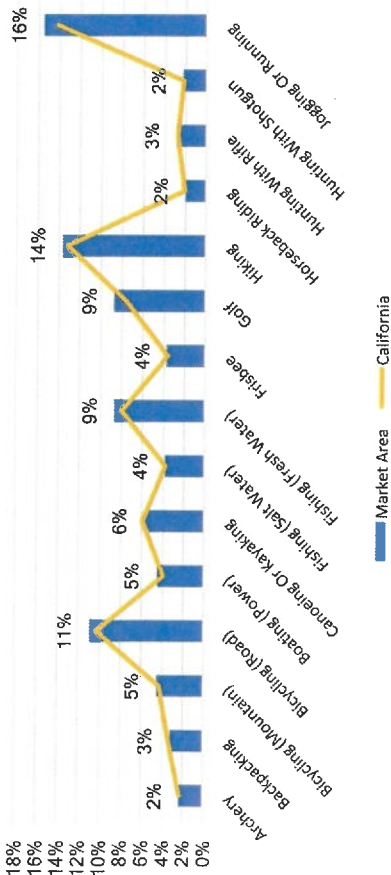


Figure 4-9: Outdoor Recreation Behavior of Market Area Compared to the State of California



4.2.3 Fitness and Health Behavior

The figure below shows household participation in various fitness activities. Participation was higher in the market area than in California specifically in the following activities:

- Swimming (17%)
- Walking For Exercise (26%)

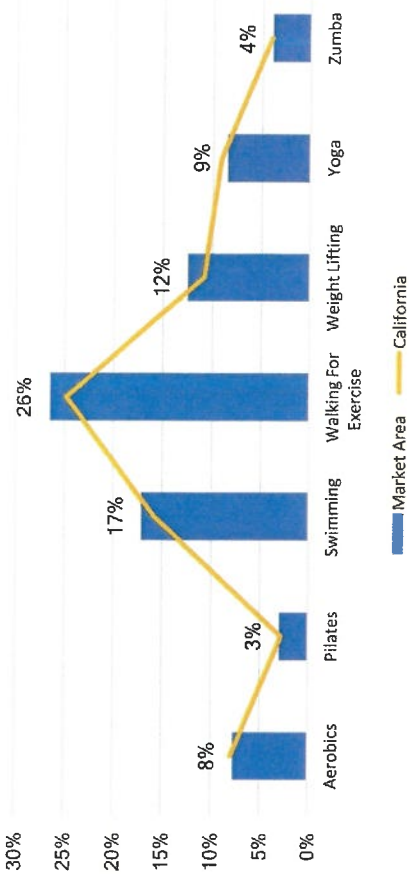


Figure 4-10: Fitness and Wellness Participation of Market Area Compared to the State of California



4.2.4 Team Sport Participation

According to census data, households in the market area had nearly the same level of participation as the state of California as a whole. Basketball, soccer, baseball, and football were ranked as the top team sports by participation in 2019.

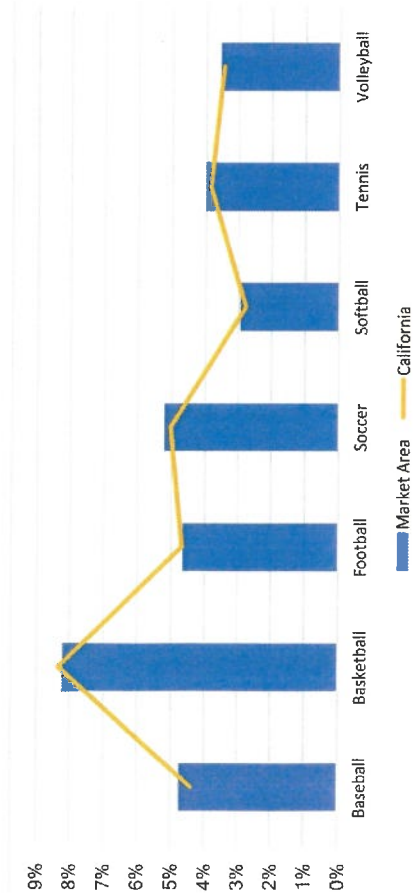


Figure 4-11: Team Sport Household Participation in Market Area compared to State of California



4.2.5 Active Transportation



In many surveys and studies on participation in recreational activities, walking, running, jogging and cycling are nearly universally rated as the most popular activities among youths and adults. Walking, jogging and running are often the most highly participated in recreational activity and cycling often ranks as the second or third most popular activity.

These activities are attractive as they require little equipment or financial investment to get started, and are open to participation to nearly all segments of the population. For these reasons, participation in these activities is often promoted as a means of spurring physical activity, and increasing public health. The design of a community's infrastructure is directly linked to physical activity – where environments are built with bicyclists and pedestrians in mind, more people bike and walk. Higher levels of bicycling and walking also coincide with increased bicycle and pedestrian safety and higher levels of physical activity. Increasing bicycling and walking in a community can have a major impact on improving public health and life expectancy.

The following trends, as well as health and economic indicators, are pulled from the Alliance for Biking and Walking's 2012 and 2014 Benchmarking Reports:

Public health trends related to bicycling and walking include:

- Quantified health benefits of active transportation can outweigh any risks associated with the activities by as much as 77 to 1, and add more years to our lives than are lost from inhaled air pollution and traffic injuries.
- 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.
- Bicycling to work significantly reduces absenteeism due to illness. Regular bicyclists took 7.4 sick days per year, while non-bicyclists took 8.7 sick days per year.

Economic benefits of bicycling and walking include:

- Bicycling and walking projects create 8 to 12 jobs per \$1 million spent, compared to just 7 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:

- There has been a gradual trend of increasing bicycling and walking to work since 2005.
- Infrastructure to support biking communities is becoming more commonly funded in communities.
- Bike share systems, making bicycles available to the public for low-cost, short-term use, have been sweeping the nation since 2010. Twenty of the most populous U.S. cities have a functional bike share system.

4.2.6 Aquatics and Water Recreation Trends

According to the National Sporting Goods Association (NSGA), swimming ranked second nationwide in terms of participation in 2018.² Nationally, there is an increasing trend towards indoor leisure and therapeutic pools. Swimming for fitness continues to be the top aspirational activity for “inactives” in all age groups, according to the Sports & Fitness Industry Association (SFIA) 2016 Sports, Fitness and Leisure Activities Topline Participation Report, representing a significant opportunity to engage inactive populations.

Additional indoor and outdoor amenities like “spray pads” or “splash pads” are becoming increasingly popular as well. In some cities and counties, spray pools are popular in the summer months and turn into ice rinks in the winter months. In this maturing market, communities are looking for atmosphere, an extension of surroundings either natural or built. Communities are also concerned about water quality as well as conservation. Interactive fountains are a popular alternative, ADA-compliant and low maintenance.

4.2.7 Community Gardens

Communities around the country are building gardens for a number of far-reaching environmental and social impacts. According to GreenLeaf Communities, which supports scientific research in environmental and human health, community gardens offer benefits including:³

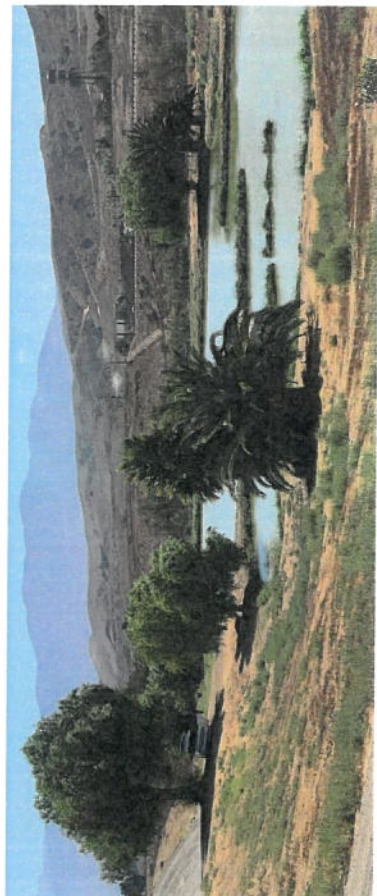
Environmenta	Social
Reducing waste through composting Improving water infiltration Increasing biodiversity of animals and plants Improving air and soil quality	Increasing intake of vegetables and fruits Promoting relaxation and improving mental health Increasing physical activity Reducing risk of obesity and obesity-related diseases

Some studies show that community gardens can improve the well-being of the entire community by bringing residents together and creating social ties. This activity can reduce crime, particularly if gardens are located in vacant lots. In fact, vacant land has the opposite effect of community gardens, including increased litter, chemical and tire dumping, drug use, and decreased property values. By creating community gardens, neighborhoods can teach useful skills in gardening, food production, selling, and business. The National Recreation and Park Association published an in-depth guide to building a community garden in parks through the Grow Your Park Initiative, which can be found on their website.⁴

4.2.8 Conservation

One of the key pillars of parks and recreation is the role that it plays in conservation. Managing and protecting open space, providing opportunities for people to connect with nature, and educating communities about conservation are all incredibly important. One of the key components of conservation is addressing climate change. Local parks and recreation can help by building climate resilient communities through water management, green infrastructure, and sustainability. A report by NRPA in 2017 titled “Park and Recreation Sustainability Practices” surveyed over 400 park and recreation agencies and found the top five ways that local departments are taking action on conservation and climate change include:

- Active Transportation – 77% reduce their carbon footprint by encouraging active transportation
- Watershed Management – 70% adopt protective measures for watershed management
- Air Quality – 53% plant and manage tree canopies that improves air quality
- Sustainable Education – 52% educate the public about sustainability practices
- Stormwater Management – 51% proactivity reduce stormwater through green infrastructure



4.2.9 Economic and Health Benefits of Parks

In 2017, the Outdoor Industry Association estimated that national consumer spending on outdoor recreation generated \$887 billion in consumer spending, and directly supported 7.6 million jobs.

- Trails, parks, and playgrounds are among the most important community amenities considered when selecting a home.
- U.S. Forest Service research indicates that when economic benefits produced by trees are assessed, the total value can be two to six times the cost for tree planting and care.⁹
- Nearly half of active Americans regard outdoor activities as their main source of exercise.¹⁰

The Benefits of Parks: Why America Needs More City Parks and Open Space, a report from the Trust for Public Land, makes the following observations about the health, economic, environmental, and social benefits of parks and open space:¹¹

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.



4.2.10 Generational Fitness Trends

As Baby Boomers enter retirement, they will be 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. Boomers are second only to Generation Y and Millennials in participation in fitness and outdoor sports.¹²

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

- In 2015, over 80% of Gen Z were active, with a quarter being active to a healthy level. Gen Z had the least percentage of inactive.
- Almost half (49%) of all Millennials were involved in high calorie burning activities.
- 48% of Gen X participated at least once a week in an fitness activity/sport.
- The Boomer generation was the least active in 2015, 34% reporting no activity and only 37% involved in high calorie burning exercises.

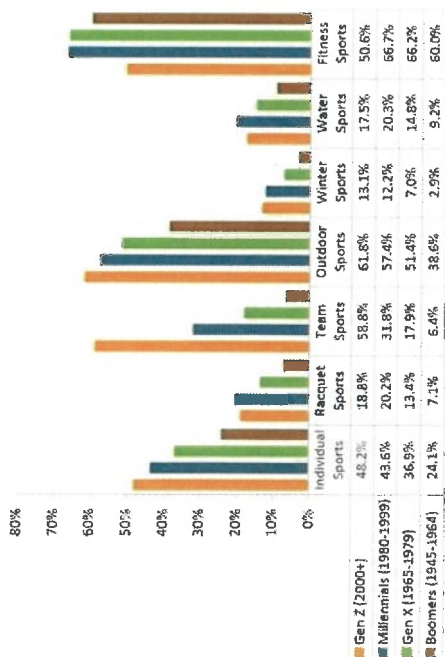


Figure 4-12: Fitness Participation by Generation. Source: SFIA Topline

4.2.11 Generational Trends in Recreation

Activity participation varies based on age, but it also varies based on generational preferences. In regard to generational activity, according to the SFIA report, Millennials had the highest percentage of those who were “active to a healthy level,” but a quarter also remained sedentary. Nearly 28 percent of Generation X were inactive, with Baby Boomers at 33 percent inactive. Baby Boomers prefer low impact fitness activities such as swimming, cycling aquatic exercise, and walking for fitness.

Generation Alpha	~ Born 2010 - Present
Generation Z	Born 1997 - 2010
Millennials	Born 1981 - 1996
Generation X	Born 1965 - 1980
Baby Boomers	Born 1946 - 1964
Silent Generation	Born 1928 - 1945

A condensed list of generational trends which may impact recreational services are below:

- Baby Boomers are staying in the workforce longer than generations before them.¹³
- Almost a third of millennials are not affiliated with religion, and half of them describe themselves as political independents.¹⁴
- Approximately 13 percent of teens (Generation Z) said they’ve had a major depressive episode in the last year.¹⁵
- Those 60 and older (Baby Boomers) spend more of their leisure time (about 4 hours) a day in front of a screen.¹⁶
- Generation Z is the most racially and ethnically diverse generation, with only 52 percent identifying as non-Hispanic whites.¹⁷
- Millennials have more financial hardships, such as student loan debt, poverty and unemployment, and lower levels of wealth, but are optimistic about their future.¹⁸

4.2.12 GolfCourses

The recent decline in golf participation has agencies and stakeholders wondering about the future of golf. According to the National Golf Foundation (NGF), from 1980 to 2000, the number of golfers grew 50 percent to almost 300 million participants. Since 2000, participation has plateaued and declined, as evidence in Figure 4-14 from the NGF. Youth sports organizations, such as The First Tee, are garnering support and engagement for golf by engaging with kids.¹⁹

Although the National Golf Foundation is optimistic about the future of golf (they expect a 1% annual growth rate), variations of the sport are growing in popularity.

There are many alternative uses of golf courses that should be considered if participation does not reach desired goals. Some of the following ideas have been implemented on golf courses around the country. Maintenance and management of the golf course should always be considered before transitioning a golf course to a multi-purpose facility.

- **Disc Golf.** According to the Professional Disc Golf Association (PDGA), disc golf has increased in participation significantly since its initial start in 1975. Approximately 92 percent of players are male and 8 percent female. In 2018, PDGA had 46,457 active members; 2,496 were under 18. In 2010, the number of disc golf courses worldwide was 3,276. In 2018, that number increased more than 150 percent to 8,364. The majority of play takes place in the United States.³¹
- **Footgolf.** A true mix of soccer and golf, footgolf is a sport played on a golf course where the players goal is to kick a soccer ball into a cup in as few shots as possible. The sport was invented



in 2009 and most formal league play is managed through American FootGolf League. Footgolf is an international sport, and it is estimated to be played in over 20 countries.³² According to the World Golf Foundation study on Alternative Golf Experiences (2015), Footgolf is estimated to be in 445 facilities in worldwide. Approximately 87 percent of participants are very likely to continue playing, and 81 percent are satisfied with Footgolf.³³

5k run/walks- Perhaps one of the most well-known recreational activities is the road race. The most popular race distance is the 5k. There were approximately 8.84 million registrants for 5ks in the United States in 2017, claiming 49 percent of all registrants (compared to the half-marathon at number two with 11 percent of all registrants). Women make up about 59 percent of participants with 41 percent being male.³⁴

Fat Biking- One of the newest trends in adventure cycling is "fat bike," multiple speed bikes that are made to ride where other bikes can't be ridden, with tires that are up to 5 inches wide run at low pressure for extra traction. Most fat bikes are used to ride on snow but they are also very effective for riding on any loose surface like sand or mud. They also work well on most rough terrain or just riding through the woods. This bike offers unique opportunities to experience nature in ways that wouldn't be possible otherwise.³⁵

- **Special Events-Golf courses can provide an ideal venue for special events.** With an often picturesque viewshed and well-maintained landscaping, golf courses are becoming more popular for events such as banquets, conferences, and weddings.

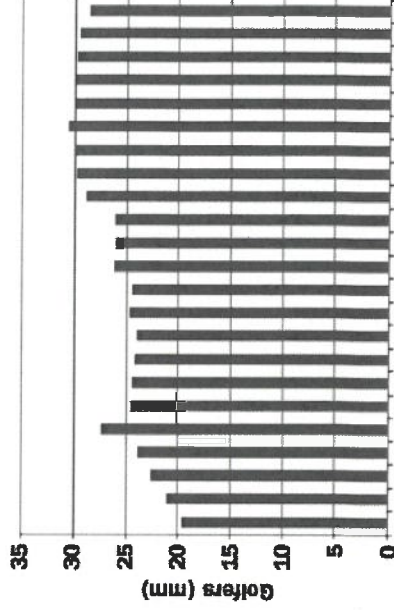


Figure 4-13: Golf Participation, Year after Year (1986 - 2009). Source: 2010 National Golf Foundation.

4.2.13 Private Public Partnerships

Municipal parks and recreation structures and delivery systems have changed as 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.

In addition, the role of parks and recreation management has shifted beyond traditional facility oversight and activity programming. The ability to evaluate and interpret data is a critical component of strategic decision making. In an article in the *Parks and Recreation Magazine* from February 2019, there are several components that allow agencies to keep up with administrative trends and become an agent of change.²⁰

1. Develop a digital transformation strategy – how will your agency innovate and adapt to technology?
2. Anticipate needs of the community through data – what information from your facilities, programs, and services can be collected and utilized for decision making?
3. Continuous education – how can you educate yourself and your team to have more knowledge and skills as technology evolves?
4. Focus on efficiency – in what ways can your operations be streamlined?
5. Embrace change as a leader – how can you help your staff to see the value in new systems and processes?
6. Reach out digitally – be sure that the public knows how to find you and ways that they can be involved.

4.2.14 Senior Programming



Many older adults and seniors are choosing to maintain active lifestyles and recognize the health benefits of regular physical activities. With the large number of adults in these age cohorts, many communities have found a need to offer more programming, activities, and facilities that support the active lifestyle this generation desires.

Public parks and recreation agencies are increasingly expected to be significant providers of such services and facilities. The American Academy of Sports Medicine issues a yearly survey of the top 20 fitness trends.²¹ It ranks senior fitness programs eighth among most popular fitness trends for 2015. Whether it's Silver Sneakers, a freestyle low-impact cardio class, or water aerobics, more Americans are realizing the many benefits of staying active throughout life. According to the National Sporting Goods Association, popular senior programming trends include hiking, birding, and swimming.

4.2.15 Shade Structures

Communities around the country are considering adding shade structures as well as shade trees to their parks, playgrounds and pools, as "a weapon against cancer and against childhood obesity"²², both to reduce future cancer risk and to promote exercise among children. A study found that melanoma rates in people under 20 rose three percent a year between 1973 and 2001, possibly due to a thinning of the ozone layer in the atmosphere. It is recommended that children seek shade between 10am and 4pm, but with so little shade available, kids have nowhere to go. Additionally, without adequate shade, many play areas are simply too hot to be inviting to children. On sunny days, the playground equipment is hot enough to scald the hands of would-be users.

Trees would help provide protection, as tree leaves absorb about 95 percent of ultraviolet radiation, but they take a decade or more to grow large enough to make a difference. So, many communities are building shade structures instead. The non-profit Shade Foundation of America is a good resource for information about shade and shade structures, www.shadefoundation.org.

4.2.16 Synthetic Turf

Demand for fields has risen with the popularity of youth and adult sports. Synthetic turf can solve many challenges for parks and recreation departments because they can withstand the constant use from players. They require less maintenance than natural turf fields, and are not easily damaged in wet weather conditions. Synthetic turf requires some periodic maintenance, which includes brushing the turf to stand up the fibers, which allows it to wear better, the addition of infill in high traffic areas (soccer goals, corner kicks, etc), and an annual deep cleaning. Synthetic turf costs significantly more upfront, and they require replacement about every ten years. This type of replacement can have a large environmental and economic footprint unless the products can be recycled, reused, or composted. Safety concerns primarily stem the chemicals found in crumb rubber. For the last 20 years, crumb rubber has been the common choice for fields. It often has a distinct plastic smell, and can leach chemicals, like zinc, into downstream waters. There are also concerns about off-gassing of crumb rubber and the potential health impacts of this material. Fortunately, advances in technology have allowed for new innovative products to be developed without crumb rubber including Nike Grind made of rubber outsoles, Thermoplastic elastomer which is a plastic recyclable pellet that feels like rubber, Ethylene propylene diene monomer which is a synthetic rubber, acrylic polymer coated sand such as Envirofill which protects from mold, mildew, and bacteria, and organic infill such as coconut fibers, cork, or processed nutshells. New innovations have allowed more sustainable and safer synthetic turf to be used by athletes, thereby removing the negative perception. In the future, shock pads may become commonplace – this is the layer under the turf that can absorb an impact and reduce the chance of a concussion. The incorporation of non-rubber infills will continue to grow.

4.2.17 Sports Trends

According to the Sports and Fitness Industry Association, high-intensity interval training (HIIT) and cross-training style workouts, or CrossFit, are two of the top trending aerobic activities. CrossFit combines elements of gymnastics, weightlifting, running, rowing, and other sports to create a varied fitness regime. Hockey, rugby, and lacrosse have all experienced an increase of participation nationwide. Although roller skating and ice skating have declined in participation, field hockey and ice hockey have both seen growth. Field hockey, from 2016 to 2017, grew 15.9 percent. Ice hockey has grown 2.8 percent average annually for the last five years.

With regard to individual sports, off-road triathlons have seen an almost 17 percent average annual growth for the last five years. These races, such as XTERRAs, consist of a competitive combination of swimming, mountain biking, and trail running. Stand up paddling (SUP) has seen, on average, 20 percent annual growth in the last five years. According to the 2018 SFIA, Millennials are more likely than other generations to engage in water sports. Pickleball, a paddle sport mixing badminton, tennis, and table tennis, is still trending, gaining an average 8 percent growth each year. Growing even slightly faster is Cardio Tennis at 9.1 percent. Cardio Tennis is a fitness program that focuses on combining a full body workout with elements of tennis.

Engaging non-participants is one of the challenges of parks and recreation agencies. According to the 2018 SFIA report, income has been seen to impact activity rates; those households making under \$50,000 are significantly less active than those making more. Data shows that having someone to join first time users will increase participation more than any other reason.

Water Sport	5 Year Avg. Annual Growth
Stand Up Paddling	20.2%
Kayaking (Whitewater)	6.0%
Recreational Kayaking	5.2%
Rafting	-1.4%
Water Skiing	-3.8%
Jet Skiing	-5.0%

Team Sport	5 Year Avg. Annual Change
Rugby	16.5%
Baseball	10.4%
Swimming on a Team	10.1%
Fast Pitch Softball	-2.7%
Touch Football	-3.5%
Ultimate Frisbee	-8.7%

Soccer	5 Year Avg. Annual Change
Indoor Soccer	3.30%
Outdoor Soccer	-1.60%

Other	5 Year Avg. Annual Change
Paintball	-0.50%
Roller Hockey	7.00%

Aerobic Activity	5 Year Avg. Annual Change
High Impact Interval Training (HIIT)	9.3%
Cross-Training Style Workouts	6.6%
Row Machine	5.8%
Stair Climbing Machine	5.6%
Aquatic Exercise	5.0%
Tai Chi	5.0%

Strength Activity	5 Year Avg. Annual Change
Kettlebells	7.0%

Individual Sports	5 Year Avg. Annual Change
Triathlon (Off-Road)	17.1%
Martial Arts	11.2%
MMA for Fitness	11.1%
Trail Running	9.6%
Boxing for Competition	9.5%
Adventure Racing	7.3%
Boxing for Fitness	6.2%

Racquet Sports	5 Year Avg. Annual Change
Cardio Tennis	9.1%
Pickleball	8.5%

Source: 2018 Sports, Fitness, and Leisure Activities, Tapline Participation Report, 2012 - 2017

Table 4-4: Sports Trends. Source: Sports, Fitness, and Leisure Activities Tapline Participation Report, 2012-2017.



Table 4-5: Cycling and Trail Recreation Participation by Activity (Ages 6+). Source: 2016 Outdoor Recreation Participation Topline Report.

	2013	2014	2015	3 Year Average Change
BMX Bicycling	2,168	2,350	2,690	7.5%
Bicycling (Mountain/Non-Paved Surface)	8,542	8,044	8,316	2.8%
Bicycling (Road/Paved Surface)	40,888	39,725	38,280	-0.8%
Hiking (Day)	34,378	36,222	37,232	2.6%
Running/Jogging	51,127	49,408	48,496	-2.3%
Trail Running	6,792	7,531	8,139	10.7%

Other Cycling

Bicycle touring is becoming a fast-growing trend around the world, including the United States and Canada. "Travelers are seeking out bike tours to stay active, minimize environmental impact, and experience diverse landscapes and cityscapes at a closer level."²⁵ Urban bike tours, popular in cycle-friendly cities in Europe, are taking hold in the United States as well. Bikes and Hikes LA, an eco-friendly bike and hike sightseeing company founded in 2018, offers visitors the opportunity to "see the city's great outdoors while getting a good workout." In New York, a hotel and a bike store are partnering to offer guests cruisers to explore the city during the summer of 2014.²⁶

One of the newest trends in adventure cycling is "fat bike," multiple speed bikes that are made to ride where other bikes can't be ridden, with tires that are up to 5 inches wide run at low pressure for extra traction. Most fat bikes are used to ride on snow, but they are also very effective for riding on any loose surface like sand or mud. They also work well on most rough terrain or just riding through the woods. This bike offers unique opportunities to experience nature in ways that wouldn't be possible otherwise.²⁷

Electric Assist Bikes, or e-bikes, are becoming commonplace on both paved and non-paved surfaces. For commuters, this option allows for a quick, convenient, and environment-friendly method of transportation. Speeds vary based on the types of e-bikes, which are typically broken down into two classes:

- » Class 1 e-bikes provide electrical assistance only while the rider is pedaling. Electrical assistance stops when the bicycle reaches 20 mph.
- » Class 2 e-bikes provide electrical assistance regardless if the rider is pedaling or not. Electrical assistance stops when the bicycle reaches 20 mph.

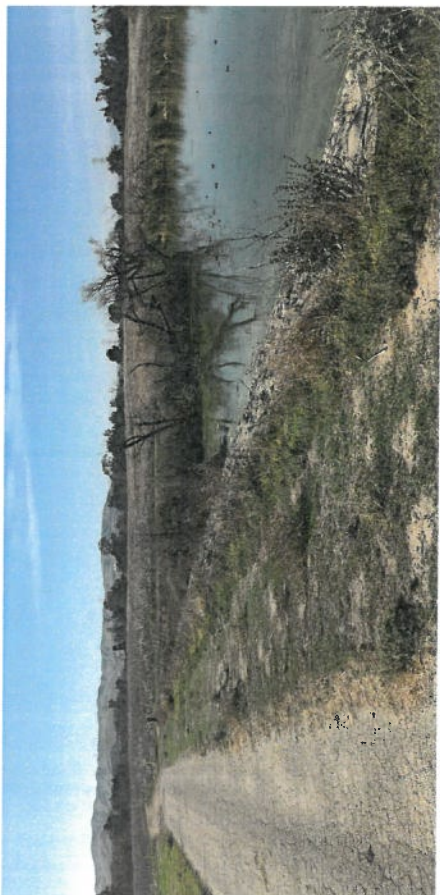
4.2.18 Trail Systems

A connected system of trails increases the level of physical activity in a community, according to the Trails for Health initiative of the (CDC).²³ Trails can provide a wide variety of opportunities for being physically active, such as walking/running/hiking, roller blading, wheelchair recreation, bicycling, cross-country skiing and snowshoeing, fishing, hunting, and horseback riding. Recognizing that active use of trails for positive health outcomes is an excellent way to encourage people to adopt healthy lifestyle changes, American Trails has launched a "Health and Trails" resource section on its website: www.americantrails.org/resources/benefits/.

The health benefits are equally as high for trails in urban neighborhoods as for those in state or national parks. A trail in the neighborhood, creating a 'linear park', makes it easier for people to incorporate exercise into their daily routines, whether for recreation or non-motorized transportation. Urban trails need to connect people to places they want to go, such as schools, transit centers, businesses, and neighborhoods.²⁴



For trail-related recreation activities such as hiking, bicycling, and running, the 2016 Outdoor Recreation Topline Report indicates a positive three-year trend for trail running, running/jogging, hiking, mountain biking and BMX biking, as shown on Table 4-5. Additionally, participation in trail running and BMX biking is up significantly over the recent three-year period.



Agencies around the country are working to proactively regulate e-bikes on their trails and greenways. Federally, e-bikes are classified as motorized vehicles, which designates them to be used specifically on motorized trails, which includes the Bureau of Land Management (BLM) and National Forest (USFS) lands. Statewide, there are also regulations which should be considered at a local level in regards to allowing electrical assisted bicycles on bike paths, pedestrian paths, and multi-purpose trails. Agencies such as Boulder County in Colorado are implementing pilot programs to test the potential of e-bikes on trails and the impact that they have to the environment, other trail users, and wildlife.²⁸

The Benefits of Parks: Why America Needs More City Parks and Open Space, a report from the Trust for Public Land, makes the following observations about the health, economic, environmental, and social benefits of parks and open space.³⁰

- 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

4.2.19 Health Trends

Research has shown that parks and recreation agencies can have a positive influence on social and physical behavior resulting in:

- Increase physical activity
- Enhance social and parental engagement
- Improve nutrition
- Better transportation and access to facilities and spaces
- Perceptions of personal and community safety
- Reductions of smoking, alcohol, and drug use

These factors can be addressed through collaborations with a variety of community partners or “actors”, such as schools, public health, medical, other governmental agencies, and private and non-profit sectors.²⁹



4.3 Recreational Market Areas

It is critical to evaluate different market areas that might attract users to the park to understand the types of activities that should be offered within the park in relation to the types of programs that are already offered in each market area. Market area studies identify potential over-saturation and can identify a need for a specific program or activity that is not currently offered. The vision statement, “Prado Regional Park will be a premier park for southern California and will include amenities and activities that will make it a first choice for a regional recreation destination” highlights the fact that this park could potentially have a regional draw from people all over southern California and so it is important that this study identify these recreational market areas.

When determining market areas, it is industry-standard to utilize a radius from the point of origin. However, a more accurate analysis defines market areas as the area accessible from an origin by traveling along the road network at posted or realistic speeds. These areas are typically referred to as drive-sheds. Both methods are accepted forms of analysis with varying degrees of refinement. For the purposes of this study, the local community, expanded community, and sub-regional areas utilize drive-shed analysis; whereas, the regional market area utilizes a radius due to limited road data available for the more comprehensive analysis. In a drive-shed analysis, the posted speeds are typically utilized; however, in southern California, it is broadly known that traffic and congestion almost always play a part in drive speeds. This analysis takes into account traffic and congestion 25% reduction in posted speeds to account for roadway crowding and reduced travel distances within a given time frame. Though peak congestion may slow traffic much more, the typical times of travel for recreation, sports practice, and tourism travel is often not during peak hours. A summary of the different market areas is explained in the maps, Figure 4-18 to Figure 4-15 and following text.

4.3.1 Local Community

The local community market area for Prado Regional Park is defined by the 20-minute drive-shed. This area includes user groups who possibly visit the site daily for recreational purposes and may use the park similar to the way someone would use a neighborhood or community park. This market area expands into the adjacent cities including Chino, Chino Hills, Eastvale, Ontario, Corona, Norco, and Eastvale. According to the 2017 ACS population, this market area covers approximately 503,976 people.

4.3.2 Expanded Community

The expanded community market area is defined by the 20-40 minute drive-shed. This area picks up another 1,812,472 people as it expands into the populated areas of Los Angeles County and reaches as far east as Brea and Industry. With the combined local and expanded community market areas, the total number of people that can access Prado Regional Park within 40 minutes is 2,316,449. It is not unreasonable to assume that someone within this area would visit the park on a weekly basis if there were improved or new facilities available to them. In addition, local groups within this area, such as schools, might use the park for field trips or office events.

4.3.3 Sub-Regional

Typical sub-regional users would be those who seek out activities that are offered within the park multiple times a year, mostly on the weekends or for larger events, sport tournaments, or special activities. The sub-regional drive-shed between 40-90 minutes includes just under 10 million people and expands into the beach cities to the west, Dana Point to the south, Yucaipa to the east, and almost reaches Hesperia to the north. Inclusive of the local- and expanded-community users, the total reach is 12,298,930 people within 90 minutes of the park.

4.3.4 Regional

Regional market covers the largest geographic area, a 100-mile radius from the park. Exclusive of the local-community, expanded-community, and sub-regional market areas, this area captures approximately 9,401,177 people. In total, Prado Regional Park market areas have just under 22 million people. This area expands from Ventura south to the U.S.-Mexican border. The regional users are those who might visit the park for extended days, but also visit the park for special events or tournaments similar to those within the sub-regional area.

Figure 4-14: Travelsheds

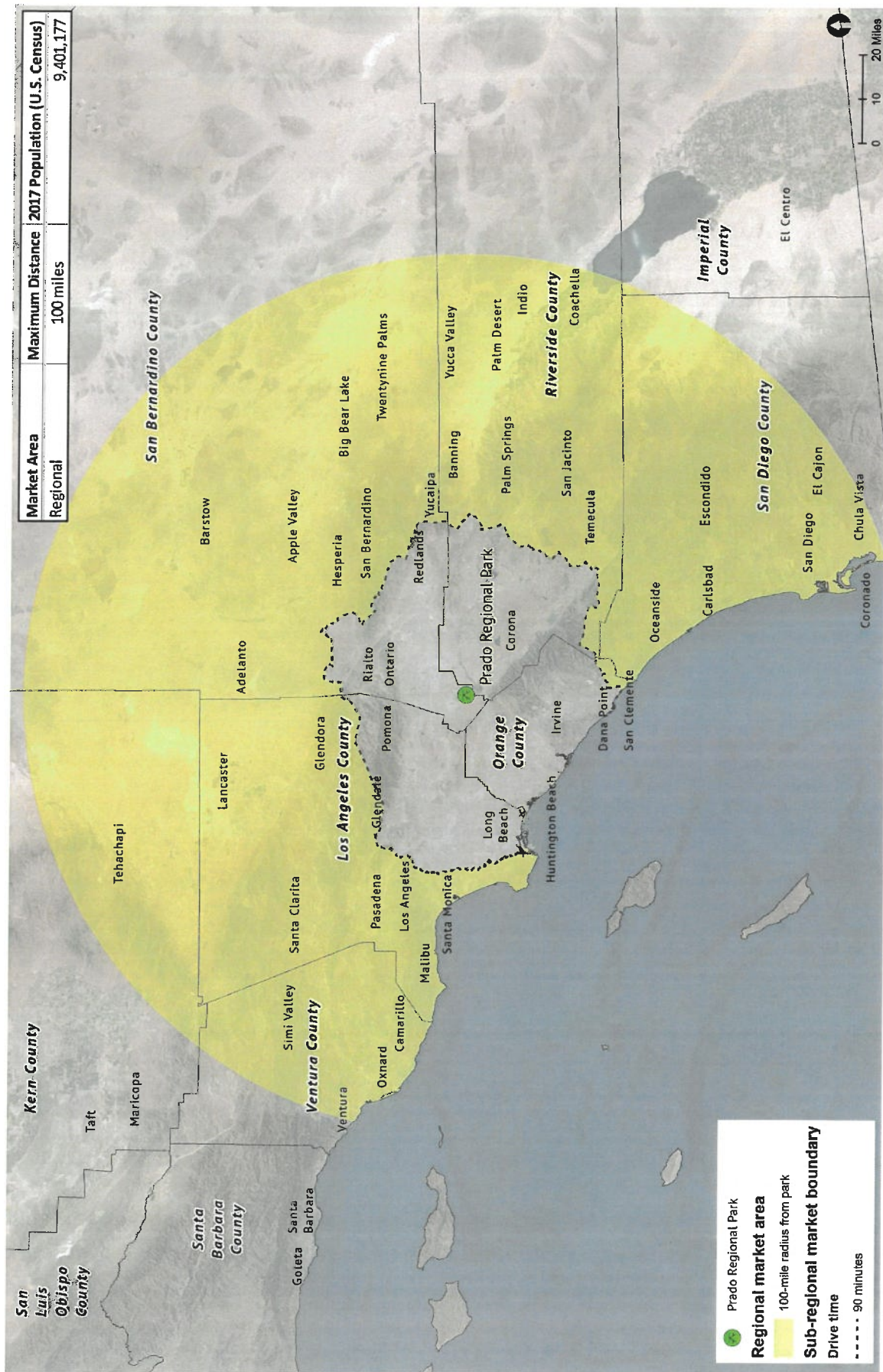


Figure 4-15: Regional Market

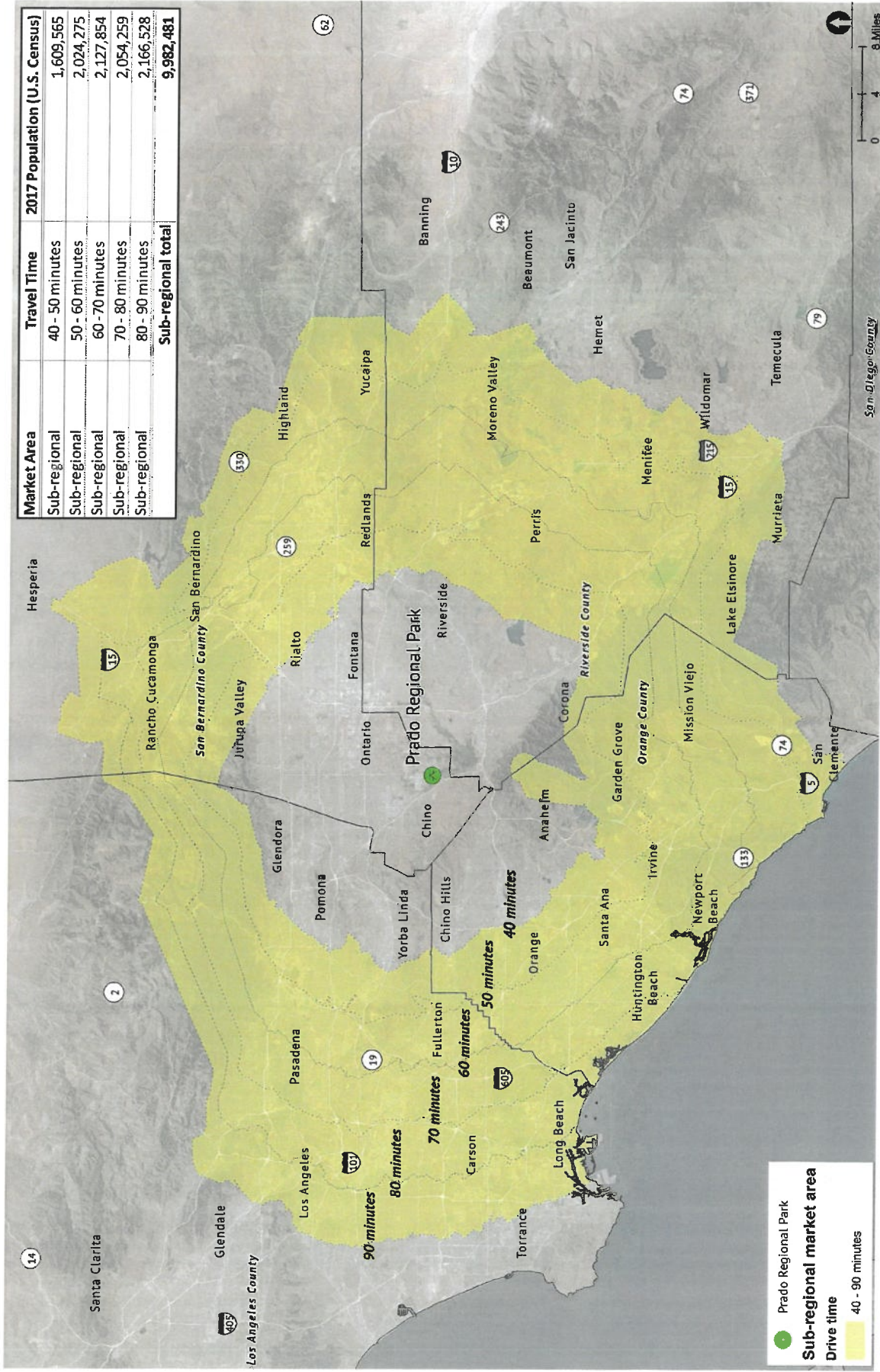


Figure 4-16: Sub-Regional Market

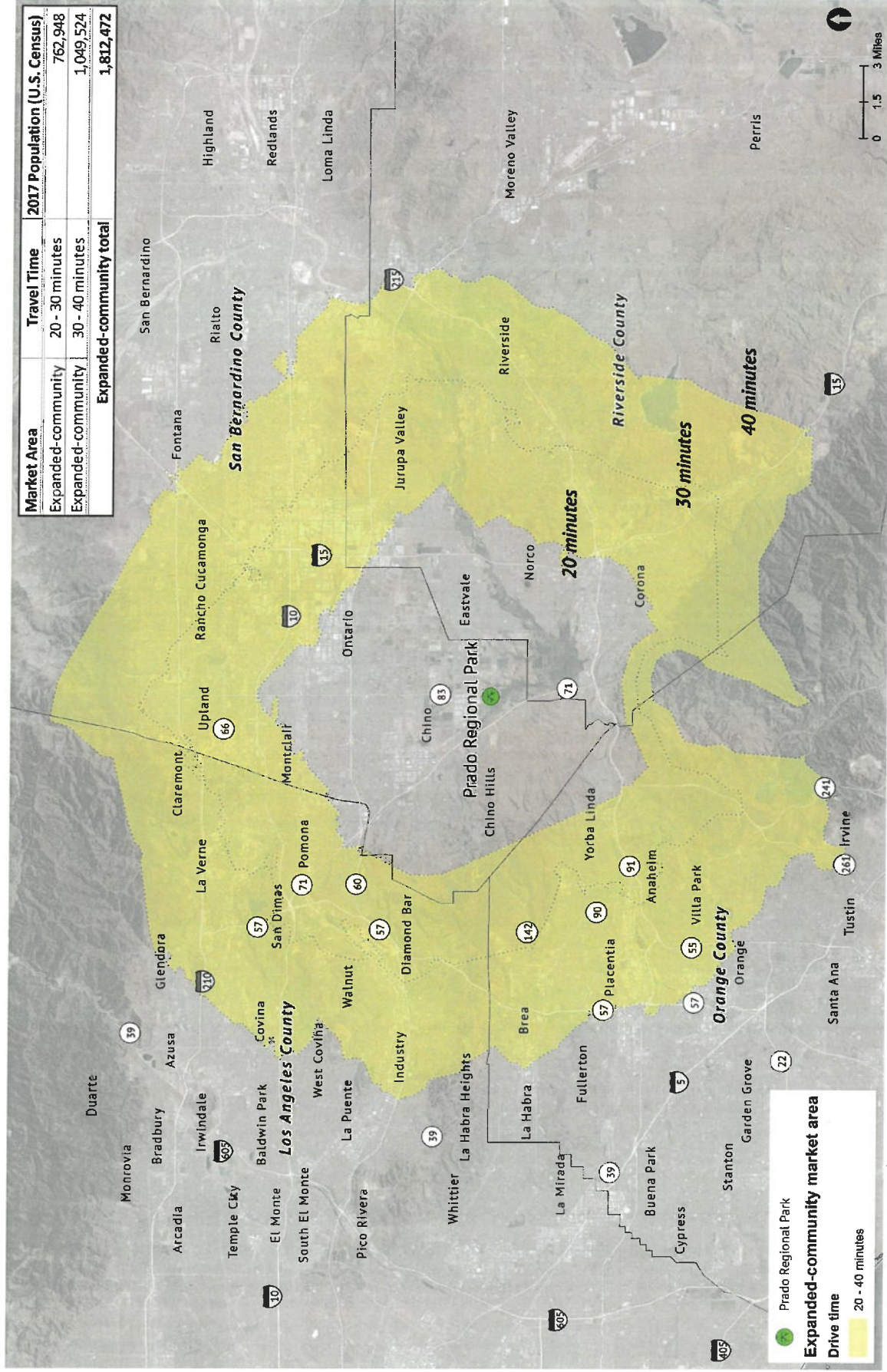


Figure 4-17: Expanded-Community Market Area

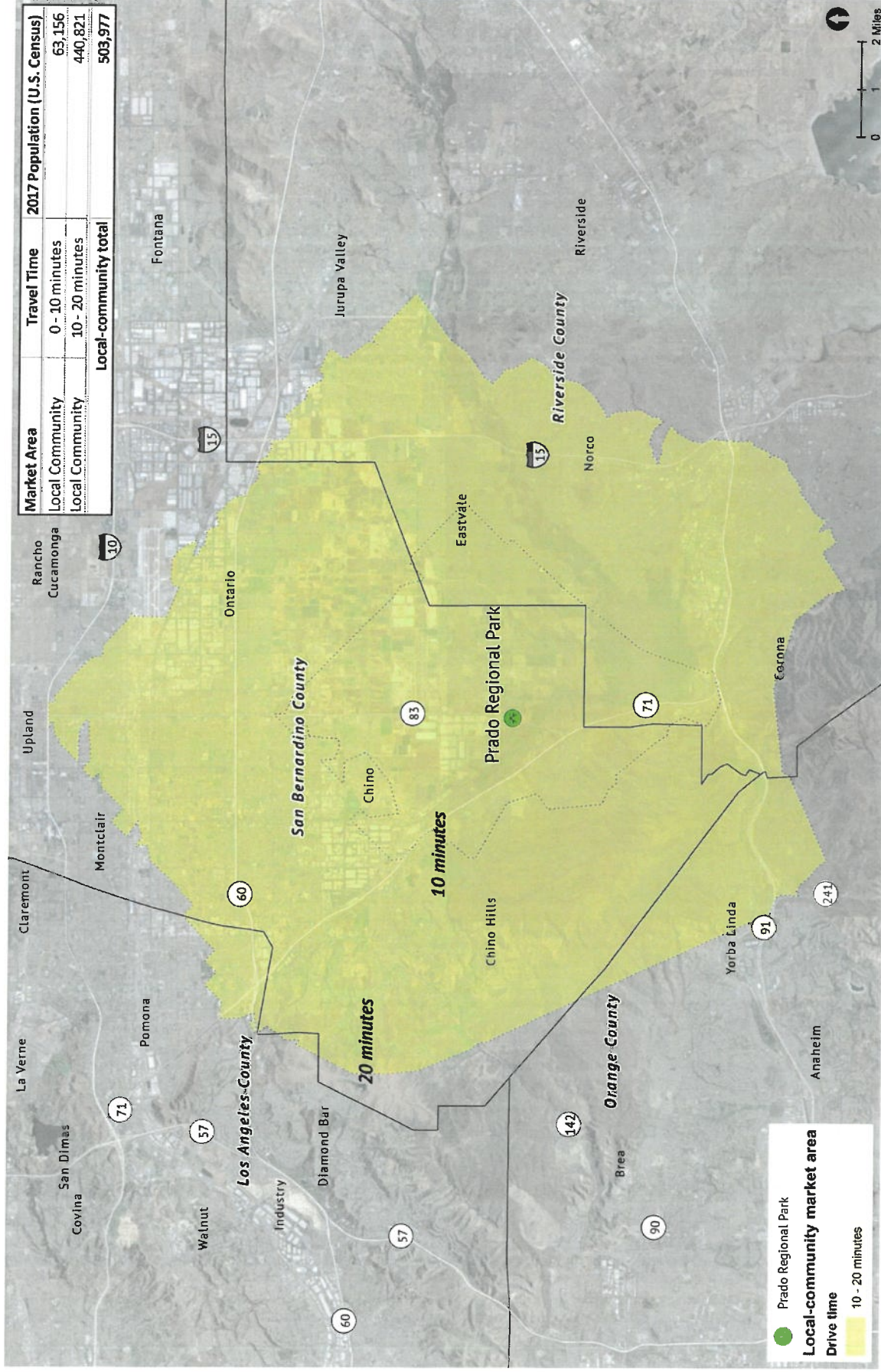


Figure 4-18: Local Community Market

4.4 Existing Recreation in the Market Area

Once various market areas are established and mapped, it is critical to evaluate existing facilities within the different areas to determine the recreational need in addition to looking at recreational trends in the region. Market research is an important component in determining whether a new program or facility will be successful, and this research should be done prior to investing in upgrades or new programs and facilities. This report gives a broad overview of the potential needs, but a more detailed feasibility and needs assessment is recommended prior to making any investment.

4.4.1 Local Community Market Area

Within the local market area, there are a total of 104 parks, including several community parks and sports complexes. Within these specific parks, there are a total of 18 soccer fields and 1 aquatic feature. These parks are most likely to be direct competition with Prado Regional Park when considering someone who might visit a park on a weekly or daily basis.

4.4.2 Expanded Community Market Area

When the market area is widened to the expanded market area, there are about 361 community parks, open spaces, trails, historic park, sports complexes, and several regional parks. Aquatic features within 12 of these parks range from wading pools, splash pads, recreational pools, diving boards, water slides, to lap pools. By expanding the area, there are around a total of 86 soccer fields in various parks.

	Local Market	Expanded Market
Park	 10	 36
Soccer	 1	 8
Aquatic	 1	 1

4.4.3 Water Parks

When looking at waterparks and aquatic centers, there are a range of indoor and outdoor waterparks, amusement parks, pools, and spray grounds. There are two competing waterparks within the local community market area, most of them in the sub-regional market area. The majority of these are under private ownership.

Table 4-6: Water Parks within 100 Miles of Prado

Name	Facility	City	Miles From Prado	Ownership	Approximate Market Area
The Cove Waterpark	Waterpark	Riverside	16	Private	Local Community
Buccaneer's Cove at Castle Park	Waterpark within amusement park	Riverside	16	Private	
Cucamonga Guasti Regional Park	Waterpark features within county park	Ontario	17	Public	
Raging Waters Los Angeles	Waterpark	San Dimas	19	Private	Expanded Community
Fontana Park Aquatic Center	Pool and Spraygrounds	Fontana	23	Public	
Glen Helen Regional Park	Waterpark within regional park	San Bernardino	28	Public	Sub-regional
Great Wolf Lodge	Indoor Waterpark and Theme Park	Garden Grove	28	Private	
Knott's Soak City	Waterpark	Buena Park	32	Private	
Splash Kingdom Waterpark	Waterpark	Redlands	33	Private	
Splash Zone	Waterpark features within city park	Rosemead	38	Public	
City Terrace Waterpark	Waterpark features within city park	Los Angeles	38	Public	
Terramor Aquatic Park	Waterpark	Mission Viejo	40	Private	
Orange Avenue Splash Zone	Waterpark features within city park	Paramount	42	Public	
Yucaipa Regional Park	Waterpark features and lagoon	Yucaipa	44	Public	
DropZone Waterpark	Waterpark	Perris	46	Private	
Alondra Park Splash Pad	Waterpark features within city park	Paramount	48	Public	Regional
Super Silly Fun Land - Universal Studios	Waterpark within amusement park	Universal City	50	Private	
Six Flags Hurricane Harbor	Waterpark	Valencia	73	Private	
The Wave Waterpark	Waterpark	Vista	74	Private	
DryTown Waterpark	Waterpark	Palmdale	76	Private	
The Wave Waterpark	Waterpark and Pool	Vista	77	Public	
Town Square Park / Panorama Park	Private Waterpark / Theme Park	Cathedral City	81	Private	
Wet and Wild	Waterpark and Lagoon	Palm Springs	82	Private	
Aquatica	Waterpark	San Diego	115	Private	

4.4.4 Equestrian Facilities

There are three equestrian centers with multiple arenas within the local community market area. The facility types include show and jumping arenas, trails, jumping, show barns, and dressage. Several of these facilities are spread throughout the 100 mile radius of Prado Regional Park.

Table 4-7: Equestrian Parks within 100 Miles of Prado

Name	Facility Type	City	Miles From Prado	Approximate Market Area
The Ranch at Silver Lakes	Five Arenas	Norco	6	Local Community
McCoy Equestrian Center	Barn, and Arenas	Chino Hills	8	
Norco Equestrian Academy	Multiple Arenas	Norco	14	
Peacock Hill Equestrian Center	Dressage, Arena and Trails	Irvine	18	Expanded Community
Orange Park Arenas	Jumping Arena, Show Arena & Trails	Orange	20	
Anaheim Equestrian	Lighted Arenas	Anaheim	23	
Moonstone Riding Academy	Jumping Arenas, Show Barn	Silverado	32	
Nellie Gail Ranch Equestrian Center	Arenas, Jumping, Trails	Laguna Hills	36	
Bridges Equestrian	Riding Academy	San Juan Capistrano	39	Sub-regional
Huntington Central Park Equestrian Center	Multiple Arenas and Trails	Huntington Beach	39	
Lake Perris Fair Grounds	Arenas	County of Riverside	40	
Rancho Sierra Vista Equestrian	Multiple Arenas	San Juan Capistrano	40	
LA Equestrian Center	Horse Shows	Burbank	48	
Enterprise Farms	Dressage, Horse Shows, Riding Center	Los Angeles	48	Regional
Shadow Hills Equestrian Center	Jumping Arena, Dressage, Trails	Lake View Terrace	55	
Deer Springs Equestrian Center	Multiple Arenas	San Marcos	72	
Jump for Joy	Jumping, Dressage, Trails	Saugus	75	
Horsemen's Center	Two Arenas, BMX Park, Primitive Tent Site	Apple Valley	85	
Del Mar National Horse Show Fairgrounds	Major Arena/Venues	Del Mar	86	
Spirit Equestrian Barron Gate	Multiple Arenas and Trails	Somis	95	

4.4.5 SOCCER

For the purposes of this analysis, soccer centers with at least five fields were evaluated within the market area. There was a large mixture of private, public, and public-private partnership when looking at the ownership of each facility. The two largest facilities, one located in Norco, which is within the local community market area, includes over 24 fields plus an arena with a capacity of 2,500-5,000 people.

Table 4-8: Soccer Centers within 100 Miles of Prado

Nam	Facility	City	Miles from	Approximate Market
Ruben Ayala Park	10 Fields plus Arena	Chino	5	Local Community
Silver Lakes Soccer Complex	24 Fields plus Arena for 5,000 Persons	Norco	6	
Rancho Mission Viejo Riding Park	6 Fields	Mission Viejo	6	
Chino Hills Community Park	5 Fields	Chino Hills	8	
Ontario Soccer Complex	1 Tournament, 6 other Fields	Ontario	9	
Cabrillo Park Soccer Complex	6 Fields	Upland	12	Expanded Community
Upland Sports Arena	4 Indoor Fields and Arena	Upland	13	
Pomona Fairplex	5 Fields	Pomona	18	
AB Brown Sports Complex	24 Fields	Riverside	23	
American Sports Center	9 Indoor Fields	Anaheim	24	
Orange County Great Park	24 plus Arena for 2,500 persons	Irvine	26	Sub-regional
Cerritos Sports Complex	6 Fields	Cerritos	32	
Westminster High School	5 Fields plus Stadium	Westminster	34	
Oso Viejo Community Park	6 Fields	Mission Viejo	35	
Aliso Viejo Community Park	5 Fields	Mission Viejo	35	
Ranch Soccer Complex	7 Fields	San Juan Capistrano	40	Regional
Los Alamos Hills Sports Park	11 Fields	Murrieta	43	
Cal State Dominguez Hills	6 Fields	Carson	43	
Patricia Birdsell Sports Park	5 Fields	Temecula	52	
Galway Downs	24 Fields	Temecula	55	
Toyota Sports Complex	12 Fields	Torrance	55	Regional
Pierce College	12 Fields	Woodland Hills	64	
Oceanside SoCal Sports Complex	20 Fields	Oceanside	73	
Central Park Santa Clarita	5 Fields	Santa Clarita	73	
Frances Ryan Park	8 full Sized Soccer Fields	Escondido	78	
4S Ranch	6 Fields	Chula Vista	86	
Del Mar Polo Fields / Carmel Valley	20 Fields	Del Mar	87	
Oxnard College Park	6 Fields	Camino del Sol	100	

4.5 Revenue sources in the park

4.5.1 Existing and potential lease fees

Existing lease agreements include the following concessionaires:

- Oranco Bowmen, Inc., Archery Range (expired June 2012) \$300 per month
- Equestrian Center (expired 2002) \$30,000 annually
- Pomona Valley Model Airplane Club (expired 2003) \$500 annually
- Prado family Shooting Center (expired 2009) \$ 1,000 monthly of 3% of gross income
- Prado Golf Course (expired 2015) % of gross revenue

A review of the concession workbook financials provided by the County shows that the Archery Range and Airplane Club pay monthly fees while the Equestrian Center, Shooting Center, and Golf Course pay a percentage of gross revenues. The annual revenues collected by the County have been consistent over the three-year period reviewed (2016-2019) with 2018 showing the highest revenue.

The review of existing concessionaire leases indicates all of the concessionaire leases have expired and new contract negotiations should be conducted to allow for new five-year renewable leases that are beneficial for both the County and the concessionaires.

4.5.2 Existing and potential gate fees

Prado Regional Park's website promotes the all-in-one recreational destination that has many outdoor recreation and adventure offerings. Many of the activities offered by the County such as fishing, camping, hiking, biking, nature trails, disc golf and picnicking are highlighted along with opportunities offered by several concessionaires such as golf, horseback riding, shooting activities, and archery. Including the activities offered by the dog park and model airplane club, as well as some of the typical special events such as the Spartan Games is recommended to be added to the description to round out the offerings currently available at Prado Regional Park. Links for a more in depth look at the activities, multi-purpose room, Prado Fees, and Prado concessions are included. A link to typical special events and a calendar of special events that is updated regularly would be recommended to help promote the activities at the park.

4.5.3 Existing and potential user fees

While Prado Regional Park's website promotes the all-in-one recreational destination the fee structure is quite complicated with over 25 different fees that may be associated with entrance to the park exclusive of any concessionaire fees. A review of user fees for other San Bernardino County Regional Parks such as Moabi, Mojave Narrows, Mojave River Forks, Yucaipa indicate that the user fees across the County's regional park system are consistent. A potential recommendation would be to simplify the user fees to allow for an easier to understand fee system for park users. Increasing the fees at Prado Regional Park would not be recommended as the Park is part of the County's larger regional park system.

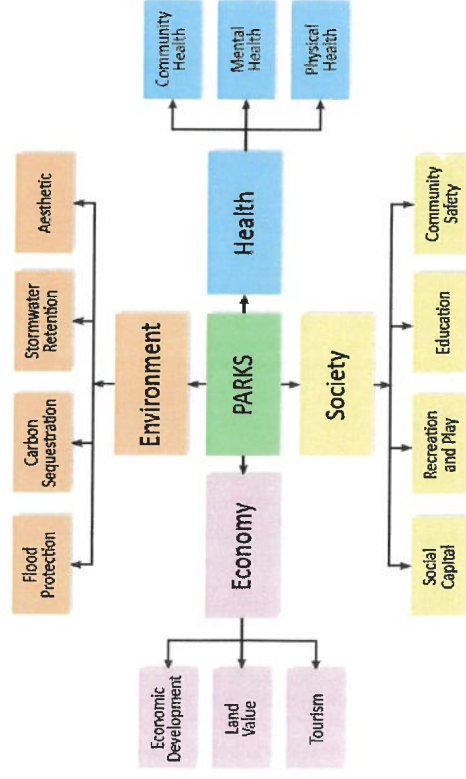
4.5.4 Economic benefit summary or Prado Regional Park

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

- Local, regional and state jobs
- Wages and salaries for employees of the park and the concessionaires
- Consumer spending in the region
- State and County tax revenue
- Trails, parks, and playgrounds are among the five most important community amenities considered when selecting a home.

The role of public parks and recreation as a health promotion and prevention agency has come of age. What matters is refocusing its efforts to insure the health, well-being, and economic prosperity of communities and citizens.

Park System Benefits provided to People



Earth Economics, 2011

4.5.5 Future potential economic benefit of changes Fields and Additional Amenities

Opportunities for expanding participation through sports tourism in the County are currently available. Adding additional fields, amenities and facilities would need to be considered. Typically, a community can attract individual sports participants within a 30-minute drive for regular participation. Participants driving up to 90 minutes or more typically involve multiple family members who are looking for additional amenities such as restaurants, shopping, entertainment and hotels.

Festivals and Special Events

Festivals and other special events are often popular activities in communities that not only entertain, generate economic activity, and serve to celebrate community identity, they are also means of introducing people to Prado Regional Park. Festival and special events can draw new users into the park. Attendants to events hosted in parks, who enjoy their experience may want to return for another event or program, or simply to enjoy the park. Participants in these special programs can become interested in visiting other parks, recreation facilities or participating in programs throughout the County as well.

4.6 Initial Market Demand and Feasibility Analysis

Prado Regional Park is unique in that it sits in the midst of an urban setting. Individuals may drive hours and even days to experience the unique setting that nature provides. In addition, the area around the park becomes more and more populated as new housing developments are built and there is a need to meet recreational requirements. Some initial programs and activities were considered based on the user survey when thinking about market demand and feasibility.

4.6.1 Camping

Camping, including RV, tent, yurt, cabin or group campgrounds rated 7th for activities on the survey.

Recreational trends indicate that camping, such as RV, tent, yurt, cabin or group campgrounds could be successful with the best chance for revenue neutral or positive revenue situations. This facility, combined with access to the other features of Prado Regional Park, would be attractive to both campers looking for activities and users of the other areas of the park looking for local accommodations.

Local market research indicates a need for camping facilities. Additionally, camping facilities will add synergy to the other amenities in the park and provide support for the other activities.

During stakeholder interviews, the need for this type of facility was mentioned repeatedly as an opportunity to attract users to the park for extended stays.

This facility could be operated by the County or a concessionaire. If operated by the County, this type of facility would require staffing, possibly one FTE to schedule and coordinate reservations and activities and enough part time staff to cover supervision of the facility.

This facility could potentially attract groups such as Boy Scouts, Girl Scouts, youth groups and church groups looking for multi-day activities and experiences.

It is recommended that if the facility is operated by a concessionaire, the County should receive a percentage of the gross revenue, and the concessionaire be required to submit a five-year business plan.



Primitive tent camping



RV camping

4.6.2 Swimming and Aquatic Facilities

Aquatic recreation such as kayaking, paddle boats, or fishing rated 4th for activities on the survey. Aquatic play including water slides, wave pools, lazy rivers, or spray grounds rated 12th, and pool activities such as lap swim, water aerobics, or swim lessons rated 12th.

Recreational trends indicate that aquatic recreation such as kayaking, paddle boats, fishing in ponds or a lake, and aquatic play, such as water slides, wave pool, lazy river, or spray grounds, could be successful with the best chance for revenue positive or revenue neutral situations. This facility would be best operated by a concessionaire. If operated by the County, this type of facility would require staffing, possibly more than one full time staff to schedule and coordinate activities, and enough part time staff to cover activities.

Local market research indicates that seven water-parks and/or aquatic centers already exist within a 30 mile drive of Prado Regional Park. Based on the existing inventory of water-parks and/or aquatic centers in the market area, the recommendation is that Prado Regional Park's aquatic facilities be different and emphasize the unique attributes of the park.

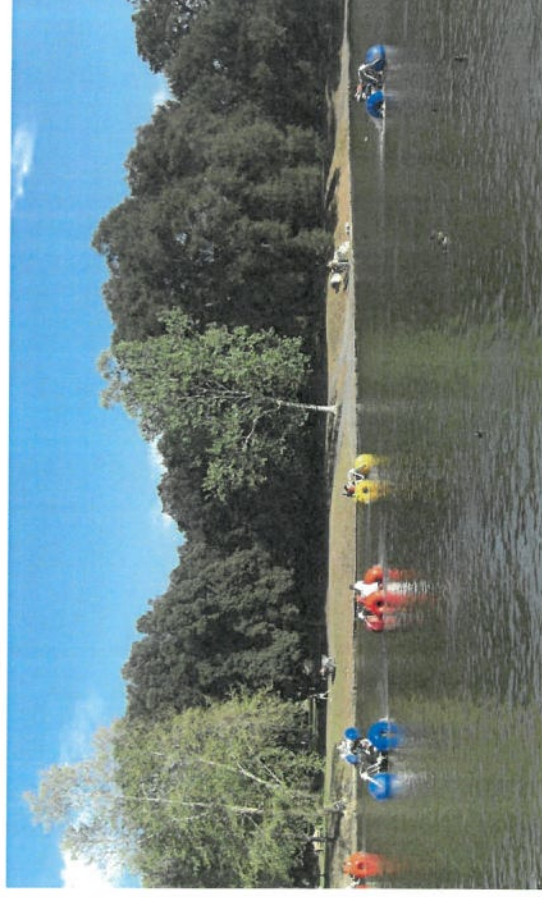
It is recommended that if this facility is operated by a concessionaire, a long-term lease agreement should be in place, and the concessionaire be required to submit a five-year business plan.



Boy Scouts of America canoe at Glen Helen Regional



Person fishing at Prado Regional



Paddle boats available at Irvine Regional

4.6.3 Soccer Complex

This facility ranked 23rd and 25th out of 27 activities in the user survey.

Significant marketing and sales will be required to utilize a facility of this magnitude to its full potential. The cost for this capital improvement and the concern regarding return on investment should be noted by the County. Collecting enough revenue to recoup the initial investment in these types of facilities is typically quite difficult. Organizations typically balk at paying actual costs for field usage. If the complex is privately developed and maintained, it does represent a good use for the land and will generate revenue for the county, depending on the negotiations of the deal. However, if capital investment or maintenance and utility expenses are assumed by the County, then it is not likely to result in any direct or indirect revenue for the park.

Demographics and recreational trends support the continued growth of soccer in the area. The additional amenities at the park would provide additional activities for families to participate in while at the park for multi-day tournaments and daily practices. If more camping choices were built at the park, especially those where camping could occur without an RV, then families could come to the tournament complex to play sports but also stay overnight at the park or utilize facilities during the day. This would allow the County to capture some of the external revenue that may be associated with a sports complex like this. Generally, hotel room tax and sales taxes are the method for an agency to capture this revenue stream. However, for the County, being able to capture the full overnight investment and daytime user fees would be the best way to build on the synergy of a dynamic and fun filled park. If the land area becomes available where the current golf course is located, this location may be a logical location for a soccer tournament and multi-use field complex.

Local market research indicates that more than 70 soccer fields and three soccer arenas already exist within a 20-mile drive of Prado Regional Park. An additional 57 soccer fields already exist within an additional 10-mile drive. Based on the existing inventory of soccer fields and the lack of identified waiting lists for soccer players/teams, the local market area appears to have close to sufficient soccer fields in the area to meet current demand.

This facility would be best operated by a concessionaire with a long-term lease agreement/ payment to the County, and the concessionaire be required to submit a five-year business plan. Soccer complexes don't survive financially solely on weekend tournaments. In order for a sports complex to be successful, the complex needs to maximize rentals for facilities Monday – Thursday with regular practice/rental from local teams within 15 to 30-minute drive times. A sports complex can't be financially sustainable and bring in enough revenue to cover the costs of maintenance/operations/capital improvements with Friday – Sunday tournaments and completions alone. It is recommended that a needs assessment survey be conducted with user and stakeholder user groups, as well as a statistically valid survey, and a true feasibility study to determine the feasibility



Silver Lakes Soccer

of a major soccer practice and competition facility. Within the 40-minute radius, there may already be enough soccer fields to meet the demands for weekday practices. Research shows 62 existing fields within a 10-mile drivetime, which would serve over 400 teams, but it is also important to recognize the remainder of park will be a positive synergy for soccer.

It is recommended that if the soccer complex was operated by a concessionaire, that the concessionaire submit a five-year business plan. Phasing should be considered in the development of the soccer complex as demand for fields is demonstrated by the concessionaire. This would be confirmed through the maximized use of the fields and the verification of waiting lists of players and teams that can't be accommodated by other fields.

4.6.4 Nature Education Center and Native Gardens

Elements associated with this facility ranked as numbers 2, 5, 6, 9 and 18 out of 27 activities in the use survey.

Linear recreation, such as walking paths, bike paths, or hiking trails, along with nature exploration, such as bird watching, nature walks, or lookouts, and nature programs for K-12, college students, or environmental groups, rated as the top three scores for activities on the survey. A nature education center would attract school groups, special interest groups, and visitors regularly.

Local market research indicates significant population and organizations that would take advantage of a nature education center on an on-going basis. Schools and other organizations could be expected to add visits to this type of facility to their curriculum.

A building structure to house displays and exhibits, and hold educational sessions, along with a trail system with interpretive signage with small outdoor seating areas for educational sessions, would be key elements for a nature education center. The close proximity of a native garden or botanical garden with extensive trails would also be very popular.

This facility would require staffing, possibly one full time staff to schedule and coordinate activities, and enough part time staff to cover activities, possibly supplemented by volunteers. It is recommended that the County charge a small fee to schools and special interest groups requesting educational sessions.

4.6.5 Agricultural Education Center and Museum

Elements associated with this facility ranked as numbers 4, 7 and 10 out of 27 activities in the use survey.

Agricultural activities, such as corn mazes, community gardens, or farmer's market, rated ninth for activities on the survey. An agricultural education center and museum should attract school groups, special interest groups, and visitors regularly.

Local market research indicates significant population and organizations that would take advantage of an agriculture education center on an on-going basis. Schools and other organizations could be expected to add visits to this type of facility to their curriculum.

A building structure to house displays and exhibits, and hold educational sessions, along with land for growing agricultural for demonstration, would be key elements for an agricultural education center. This facility could share staffing with the nature education center.

It is recommended that the County charge a small fee to schools and special interest groups requesting educational sessions. The County has discussed the potential of this amenity being located off-site at the Yorba-Slaughter Adobe House which is near the west edge of the park.



Robinson Nature



Deanna Rose Children's

4.6.6 Equestrian Center

This facility received a ranking of 16 out of 27 ranked activities.

During stakeholder interviews with the concessionaire, requests for improved and/or new facilities was received. The concessionaire indicated a slight willingness to pay increased fees for improved facilities and amenities.

Recreational trends indicate that equestrian activities have a small but consistent presence in the area, with not a lot of expected growth of participants.

This facility is best operated by a concessionaire with a long-term lease agreement, along with a minimal payment plus a percentage of the gross revenue.

It is recommended that this facility be operated by a concessionaire with a long-term lease agreement along with a minimal payment plus a percentage of the gross revenue, and that the concessionaire submit a five-year business plan.

4.6.7 Adventure Park

Elements associated with this facility ranked as numbers 10, 13, 15 and 26 out of 27 in the user survey.

Recreational trends indicate that adventure centers could be successful with the best chance for revenue positive or revenue neutral situations. This facility, combined with access to the other features of Prado Regional Park, would be attractive to both campers and users of the other areas of the park looking for activities.

Local market research indicates a shortage of adventure type facilities. Prado Regional Park is uniquely positioned to develop an adventure park featuring the uniqueness of the area in which the park exists. Additionally, an adventure facility will add synergy to the other amenities in the park. It would also be easily themed with nature, adventure and could also build on its agricultural roots.

This facility would be best operated by a concessionaire. If operated by the County, this type of facility would require staffing, possibly more than one full-time staff person to schedule and coordinate reservations and activities, and enough part time staff to cover supervision of the facility.

This facility could potentially attract groups such as Boy Scouts, Girl Scouts, youth groups, corporate groups, and church groups looking for activities and experiences. This facility could also benefit from the existing adventure events that already occur in the park.

It is recommended that if this facility is operated by a concessionaire, a long-term lease agreement should be in place, with a minimal payment plus a percentage of the gross revenue and that the concessionaire be required to submit a five-year business plan.



Equestrian Center in Silver



Outdoor challenge

4.6.8 Archery and Rifle Tournament Center

This activity was ranked 19th out of 27 activities as determined by user input.

Capital improvements are needed for this facility. A concern exists regarding return on investment may not be financial feasibility for this facility compared to the needed capital improvements. During stakeholder interviews with the concessionaire, requests for improved and/or new facilities were received. The concessionaire indicated a slight willingness to pay increased fees for improved facilities and amenities.

Recreational trends indicate that archery, rifle, and skeet shooting activities have a consistent presence in the area, with some potential for expected growth of participants.

Local market research indicates a continued need for this type of facility. Sufficient interest appears to exist in the local area to provide continued support for this facility.

This facility is best operated by a concessionaire with a long-term lease agreement. It is recommended that if this facility is operated by a concessionaire, a long-term lease agreement should be in place, and that the concessionaire be required to submit a five-year business plan.

4.6.9 Special Events Area

Elements associated with this area ranked 12th and 27th out of 27 in the user survey.

Recreational trends indicate that special events, adventure activities, and social events could be successful with the best chance for revenue positive or revenue neutral situations. This facility, combined with access to the other features of Prado Regional Park, would be attractive to both campers and users of the other areas of the park looking for activities.

Local market research indicates a shortage of special event venues. Prado Regional Park is uniquely positioned to develop a special event area to complement the other amenities being considered for the park. A special events area will help promote all of the other areas of the park, exposing large numbers of participants to the park.

This facility would be best operated by the County. This type of facility would require staffing, possibly more than one full time person to schedule and coordinate reservations and activities, and enough part time staff to cover supervision of the facility. Significant marketing and sales will be required to utilize a facility of this magnitude to its full potential.

This facility could potentially attract national organizations such as spartan runs, mud runs, or ninja warrior challenges, as well as groups such as Boy Scouts, Girl Scouts, youth groups, corporate groups and church groups looking for activities and experiences.



Archery



Unique Special Event

4.6.10 Linear Recreation

This is the highest ranked facility and use out of the 27 choices.

Linear recreation, such as walking paths, bike paths, or hiking trails, rated as the top score for activities on the survey. The other features listed above have traditionally rated as highly desired on surveys and in recreational trends. While these amenities are not activity specific, they are key elements to the overall plan.

All other miscellaneous amenities, in order of ranking, that do not fit into activity groups but would be distributed around the park, include improved shade such as shelters and trees, continuous sidewalks throughout the park, additional restrooms, lighting for evening use, drinking fountains, wayfinding signage, and increased parking. While these amenities are not activity specific, they are key elements to the overall plan and should all be considered as amenities to add to Prado Regional Park.



Mountain biking



Multi-purpose path along lake's



Fitness stations along walking

Footnotes

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