

Appendix 2 – Demographic and Trends Analysis

CHAPTER ONE - DEMOGRAPHIC ANALYSIS

The Demographic Analysis provides an understanding of the composition of Maricopa County populace. This analysis demonstrates the overall size by total population by specific age segment, race, ethnicity, the overall economic status and spending power of the residents through household income statistics. From this base data, a clear understanding of the market size, economic factors, and trends will emerge. Having this information will help determine potential participation within the County as a whole as well as the individual parks target markets.

1.1 INTRODUCTION

Population measurements four unique components, each set counteracts with the other – births and deaths, and a rise and decline in population growth as individuals move in and out of the state. According to population estimates for Arizona, produced by the Arizona Department of Commerce, Maricopa County’s population estimate for 2007 was 3,907,492. This number reflects a 27.2% increase from the 2000 census total which was 3,072,149. The population measurement most responsible for the swell in the County populace is immigration.

Fueled by year-round sunshine, the scenic natural beauty, and relatively favorable housing and job markets, the population boom is expected to continue. Projections estimate an approximate 51% increase in the total population from 2007 through 2022, when the total population is expected to reach 5,880,000 persons.

The county has a relatively young population – the median age is 33. The largest major age segment is comprised of those between 18 and 44 years of age. Gender distribution of Maricopa County is nearly equal with female residents accounting for slightly more than half (50.04%) of the County population, a distribution that is projected to stay constant for the foreseeable future. The County is predominantly made up of persons classified as white (74.4%), with persons of Hispanic or Latino origin accounting for nearly 30% percent of the total population. The estimated 2007 median household income in Maricopa County was \$60,193, or roughly 30% higher than the median U.S. household income reported for 2000.

Although both public and private recreational venues have been developed within the County boundaries over the last decade, the development of large scale public park and recreation park sites, assets, and amenities has not maintained a proportional scale. The only recent significant large scale addition by the County Parks and Recreation Department has been San Tan Mountain Regional Park. However, based on total acreage available of both municipal and county inventories, two points can be made:

1. The availability of undeveloped parkland is still significant; currently, less than 3% of the County’s system is “developed” for some type of recreational use
2. Many of the municipal park systems located in the County have made investments in their public park systems by addition of park sites, trails, or amenities

With the expected increase of two million persons over the next 15 years, the County as a whole would need to develop or increase parkland inventories by an additional 30,000 acres of parkland. Depending on the standard utilized to meet the values of the community, this

acreage estimate could be higher or lower by 20-30%; for the 15-year estimate, the common standard of 15 acres per 1,000 persons was utilized.

The state of fluctuation that many County residents endured during the County's population and real estate boom of the 2000's, as well as the ensuing bust of the same real estate market, may not be obvious when viewing the income characteristics. It could be assumed however, that with the increase in cost of living and the likely subsequent decrease in disposable income, a larger demand was placed on public recreational venues. This phenomenon is nothing more than the basic supply and demand curve – as the demand wanes for cost prohibitive entertainment and leisure options due to the decrease in discretionary spending, it could be expected that an increase in reasonably priced, traditional parks and recreation activities increased. This increase in use could allow the County to capture a recently unrepresented portion of the population. Building on the County's current passive use, nature based programming could meet this estimated new demand – Americans enjoy the experience of the outdoors and most self-guided or passive based programming is cost-effective.

1.2 METHODOLOGY

The most current data available was used for this analysis. All data was acquired in September 2007, and reflects actual numbers as reported in the 2000 U.S. Census and demographic estimates for 2007 and 2012 as estimated by Environmental Systems Research Institute (ESRI), with linear regression used for projected 2017 and 2022 demographics. Demographic data was compared to information provided by the Maricopa Association of Governments. No significant variations were present.

1.3 MARICOPA COUNTY, ARIZONA

Maricopa County is the most populous county in the State of Arizona; with an estimated 2007 population of 3,901,548, and an area of approximately 132.4 square miles, the population density of the county is roughly 46.04 people per acre of land. In comparison, the State of Arizona as a whole equates to 0.08 persons per acre.

Population categorization by age segment demonstrates the relative youth of the county (**Figure 1**); the largest single age segment is comprised of those between the ages of eighteen and forty-four (39% of the total population). The eighteen to forty-four year old segment represents the “doers” of the community – those individuals most responsible for the “vibe” and energy associated with the particular area. The forty-five to sixty-four year old population represents 22% of the county population while the sixty-five and over population (all of those aged sixty-five and above) represent approximately 12% of the population. The youth of the county – those under the age of eighteen – represent approximately 27% of the population. This population composition lends itself to a very wide range of recreational, educational, and entertainment options.

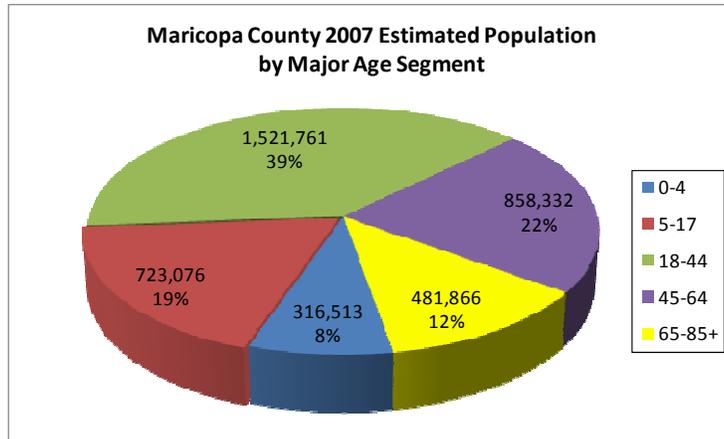


Figure 1 - Population by Major Age Segment 2007

1.3.1 RECREATION PRINCIPLES AND AGE

Although a person's age should be considered when planning for program opportunities – recreational programs should be available for each of the major age segments – age alone should not define the ultimate program offering. Age is one of many defining factors in recreation participation patterns. Personality, social influences, early life recreation experiences, and leisure attitudes also shape recreation behavior throughout the lifetime. The Leisure Information Network's "A Look at Leisure" white paper theorized multiple motives which decline in importance with age, and conversely, is generally considered a priority for young, maturing person. This means that as individual's age, the declining motivation effectively reduces their desire to participate in certain learning or skill building programs. These principals and motives include, but are not limited to:

- Improving skills or knowledge or learning new skills/abilities – valuable asset for a young person or maturing adult; as one ages, the desire, need, and ability to improve skill sets generally decline
- To compete/for a challenge – competitor based programs are generally targeted toward the youth or young adult segments
- For excitement – as with competitor based programming, as the populace ages, thrill seeking and extreme adventure generally levels off

Motivational principals which are often sought after and can increase in importance with age:

- To help/be an asset for the Community – volunteerism and public stewardship generally increases with age; one contributing factor of increased stewardship is the amount of available "free time" the maturing demographic has due to a reduced workload as a result of a partial-retirement or total retirement
- To enjoy nature – trends suggest as the population ages participation in outdoor viewing activities increase; these activities include bird and wildlife viewing and interpretive walks

- Relaxation – in stark contrast to the thrill seeking commonly associated with a youthful age segment, an aging populace generally seeks out activities which are stimulating while allowing for a regeneration of the mind and body

Although often described as an attractive destination for retirees, Maricopa County’s population composition is currently similar to national averages. As the County continues to experience an increase in total numbers of persons, it can be expected that a portion of those households will mimic the expected trends of the general U.S. population:

- More baby-boomers – loosely defined as persons aged 55 years or more; many are either already retired/semi-retired or nearing retirement
- Empty nesters – households comprised of two adults and no children

As screen time – time spent in front of televisions and computers – increases for America’s youth, it is vital that a realistic and practical alternative to traditional sporting activities is made available for the multitude of youth that choose to not participate in the “bat and ball” sports. Multiple research sources, including American Sports Data, Inc.’s survey information, has shown that the youngest of generation X and many in generation Y have shunned the organized team activities at much greater rates than the preceding generations. The nearly limitless alternatives provided through natural environment allow for an ever evolving youth-based program. Participation trends as they pertain to age and race/ethnicity are presented in the Outdoor Activity Trends section of this report.

1.3.2 POPULATION GROWTH

The population of Maricopa County is projected to surge by 51% by 2022 to 5,880,035 persons. During the scope of this period (2007 to 2022) this projected increase results in an annual increase of approximately 1.32% per year. While all population segments are expected to grow in number by 2022, the number of individuals between the ages of eighteen and forty-four is anticipated to decline 3% as compared to the population as a whole. In contrast, the number of county residents between the ages of forty-five and eighty-five will increase its share of the total population by an estimated 4%. This implies that not only is there expected to be a greater portion of new residents comprised of households without children, but a portion of the households with youth are projected to lose their adolescent members to other areas due to attendance at institutions of higher education, families relocating, or other events. In general, the County is

Figure 2 presents 2022 population estimates by major age segment.

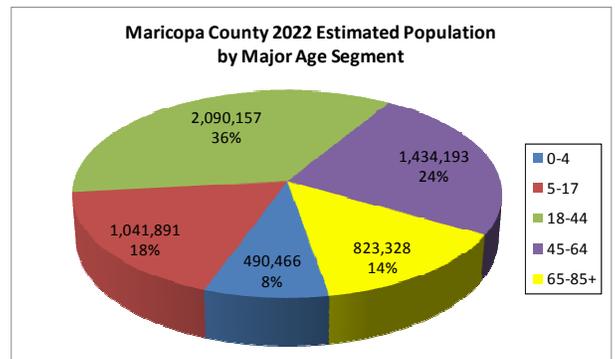


Figure 2 - Population by Major Age Segment 2022

1.3.3 GENDER

The gender distribution of Maricopa County is nearly equal with female residents accounting for 50.04% of the county population. This distribution is projected to remain constant through 2022.

Analyzing the population by gender reveals that as the population increases in age the female share of the population also increases (**Figure 3**). For 2007, the male to female ratio for residents eighteen and over is nearly even with males at 49.5% and females at 50.5%. An analysis of gender for those aged sixty-five and above reveals a twelve percent gap in gender make-up (Male – 43.8%; Female – 56.2%). Similar trends are anticipated in 2022, with a slight decrease in the gender gap to 11.6% (**Figure 4**).

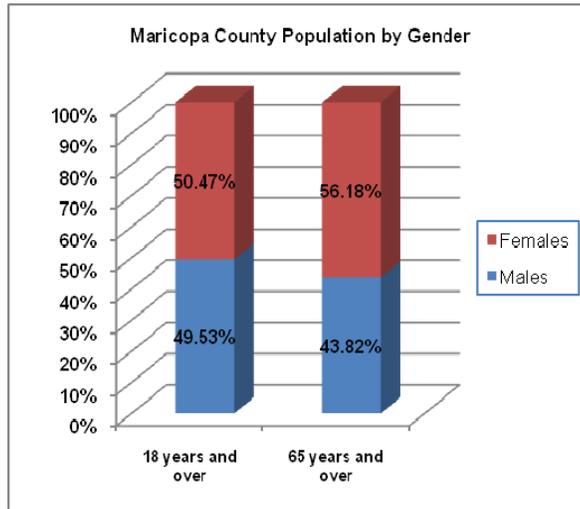


Figure 3 - Population by Gender, 2007

Current recreational trends indicate that Americans participate in a sport or recreational activity of some kind at a relatively high rate (65%). Women participation rates, however, are slightly lower than their male counterparts – 61% of women participate at least once per year in a sport or recreational activity compared to a 69% participation rate of men.

According to recreational trends research performed in the industry over the past twenty years, the top ten recreational activities for women are currently walking, aerobics, general exercising, biking, jogging, basketball, lifting weights, golf, swimming, and tennis. The top ten recreational activities for men are golf, basketball, walking, jogging, biking, lifting weights, football, hiking, fishing, and hunting. While men and women share a desire for six of the top ten recreational activities listed above, men claim to participate in their favorite activities more often than women in any ninety-day span. With more women participating in recreational activities further into adulthood, more are opting for less team oriented activities that dominate the female youth recreation environment and shifting more towards a diverse selection of individual participant activities as evident in the top ten recreational activities mentioned above.

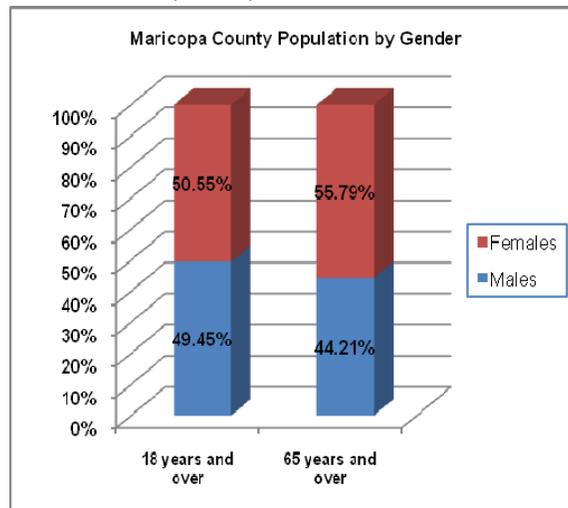


Figure 4 - Population by Gender, 2022

1.3.4 RACE AND ETHNICITY

Maricopa County’s predominant race is white, accounting for nearly seventy-five percent of the total population (74.4%; 2,902,385 persons). The next largest race is that of those identified as other (14.0%; 547,988 persons) followed by those classified as black (3.9%; 150,330 persons), as shown in **Figure 5**. All remaining races combined (i.e., American Indian, Asian, Pacific Islander, and those identified with two or more races) total approximately eight percent of the population (7.7%; 300,845 persons).

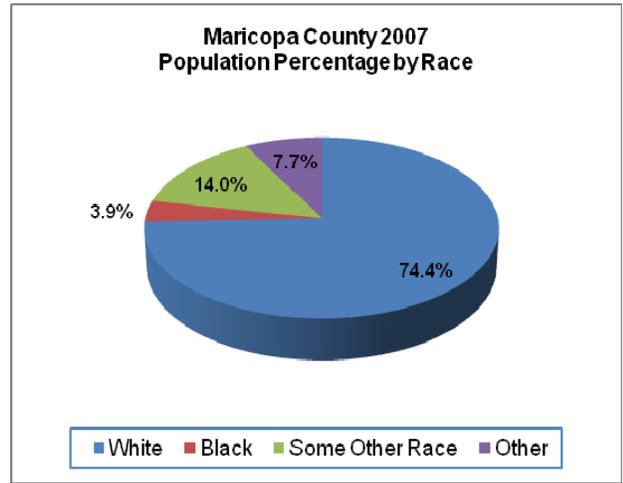


Figure 6 - Population by Race 2007

Contrary to belief, Hispanic/Latino is not an actual race, but a grouping of multiple races within the Latino community. Persons of any race in combination with being classified as being of Hispanic or Latino origin account for nearly 30% of the current population (29.4%; 1,147,513 persons).

Population by Race, Maricopa County

	2000 Census	2007 Estimate	2012 Projection	2017 Projection	2022 Projection
White Alone	2,376,359	2,902,385	3,344,489	3,731,182	4,132,794
Black Alone	114,551	150,330	180,325	206,614	233,901
American Indian Alone	56,706	70,861	82,568	92,942	103,675
Asian Alone	66,445	99,696	131,003	156,002	182,699
Pacific Islander Alone	4,406	6,051	7,508	8,730	10,015
Some Other Race Alone	364,213	547,988	721,782	860,073	1,007,922
Two or More Races	89,469	124,237	155,688	181,615	209,029
Total Population by Race/Ethnicity	3,072,149	3,901,548	4,623,363	5,237,158	5,880,035
Hispanic/Latino Origin (Any Race)	763,341	1,147,513	1,509,808	1,798,730	2,107,406

Source: U.S. Census and ESRI

Figure 5 - Population by Race

Hispanic and Latino Americans have strong cultural and community traditions with an emphasis placed on the extended family, many times gathering in large recreational groups where multiple activities geared towards all age segments of the group may participate. Large group pavilions with picnicking amenities and multi-purpose fields are integral in the communal pastime shared by many Hispanics.

The 2022 projections shown in **Figure 7** indicate a slight decrease in the white population from 74.4% to 70.3%. The number of persons classified as Hispanic or Latino decent is projected to account for 36% of the total population by 2022 (total of 2,107,406 persons).

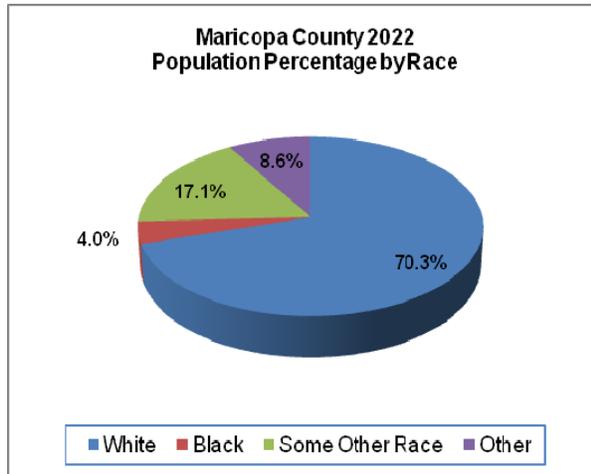


Figure 7 –Population by Race 2022

1.3.5 HOUSEHOLDS AND INCOME

Currently, there is an estimated 1,422,956 households in Maricopa County with an average household size of 2.71 persons. The 2000 Census of Population and Housing indicates that family households in the county account for 67.4% of all households, with 51.6% of family households made up of married-couple families. Non-family households account for the remaining 32.6%. This percentage of family versus non-family households parallel U.S. averages for household characteristics.

The estimated 2007 median household income in Maricopa County is \$60,193, up from \$45,353 reported in the 2000 Census (see **Figure 8**). This represents the earnings of all persons age 16 years or older living together in a housing unit. This significant

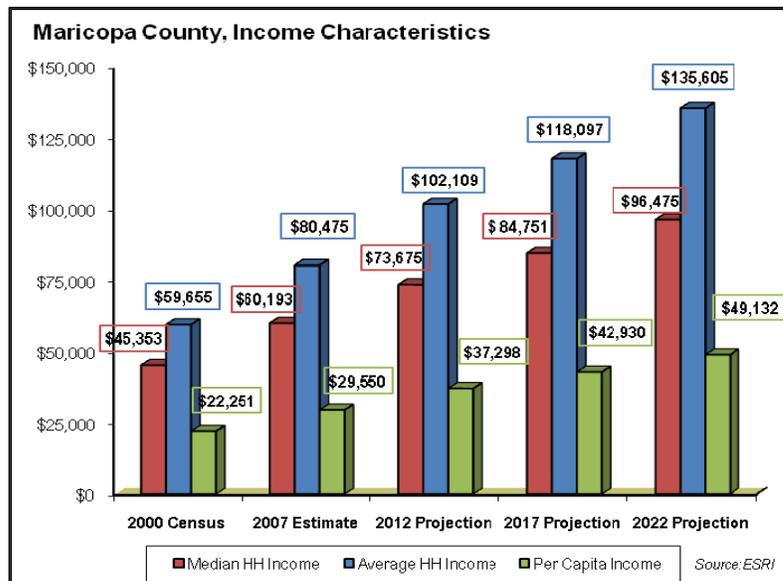


Figure 8 - Income Characteristics

increase implies that significant business development or relocation has occurred within the county during this period. The county’s median household income is 30% higher than the average U.S. household income reported for 2005 of \$46,242.

Based on the ACCRA Cost of Living Index, the Phoenix cost of living index for the first quarter of 2007 was comparable to the U.S. average. However, compared to other large cities, only

Dallas and Atlanta were determined to have a cheaper cost of living than Phoenix. With an average household income over and above the national average and a cost of living index that is lower than most metropolitan areas, it can be expected that there is a presence of relatively high disposable income and a greater price elasticity. This would imply that the populace is better suited to absorb an increase in costs associated with additional experiences or increased fees associated with a quality experience.

Ultimately, the County Park System faces the same challenges of all parks and recreation providers nationwide – county, city, state, and even private providers – providing a consistent and quality laden experience for an ever demanding constituency in an atmosphere of increasing competition. This can be accomplished by offering programs to all age segments which not only are desirable, but closely adhere to the Department’s mission.

1.4 OUTDOOR ACTIVITY TRENDS

Recent studies conducted by the Bureau of Outdoor Recreation indicate that Americans prefer relatively simple outdoor recreation opportunities. While inactivity has been plaguing society as a whole, the definition of “traditional” activity has begun to evolve.

The Outdoor Industry Association notes the two major generational categories in the U.S. – Baby Boomers (born between 1946 and 1964) and the Millennials (born between 1978 and 2003) – have made a major delineation with their predecessors in regards to active lifestyles. Baby boomers have shed the image of the relaxed, sedentary lifestyle of generations past and have now begun pursuing a more active form of “retirement”. Many boomers are continuing their active and healthy living they converted to later in life well into their sunset years as evident by the increasing numbers of seniors participating in the fitness industry. Scott Parmelee, publisher of Outside magazine, describes the boomers as a “hybrid person” that enjoys “less strenuous” activities while still connecting with nature and the outdoors. Many boomers characterize current experiences to personal growth while the Millennials seek the thrill.

Millennials, the X and Y generations that pioneered adventure and extreme sports, have been most responsible for the decline in the traditional “bat and ball” sports, electing instead for less structured activities. Skateboarding, rock climbing, and mountain biking have replaced the nearly mandatory participation many youth took part in with baseball, football, and soccer.

The mainstays of outdoor recreation – hiking, biking, camping, fishing, and paddling – comprise the greatest number of users. However, the greatest growth has occurred in activities that have low barriers to entry, can be undertaken within close proximity to home, and can be completed in a limited amount of time. As the definition of recreation continues to evolve, so too will the participant. The Outdoor Industry Foundation’s Outdoor Recreation Participation Study key findings include:

- The tendency to experience multiple activities – the majority (62.6%) of Americans 16 and older participated in between 1 and 3 outdoor activities in 2005
- The top five activities are staples that date back generations and can be participated in with relatively little monetarily investment – bicycling (38.2%

- participation rate), fishing (34.5% participation rate), hiking (34.2% participation rate), camping (30.4% participation rate), trail running (18.0% participation rate)
- In accordance with the increasing non-active leisure hours, total outings for outdoor recreation have declined – in 2005 Americans 16 and older participated in 7.3 billion outings as compared to 8.3 billion outings in 2004
 - Bicycling had the largest decline, 3.9 billion outings in 2004 as compared to 3.1 billion outings in 2005
 - Fishing accounted for the majority of the remainder of the decrease in outings, declining from 1.4 billion outings in 2004 to 1.1 outings in 2005
 - Both activities (bicycling and fishing) still remain in the five most participated activities by total outings in 2005
 - Median number of outings declined by twelve percent (11.8%) from 51 in 2004 to 45 in 2005
 - The majority of all outdoor activities have low frequencies of participation – except for bicycling, bird watching, and trail running, the majority of individuals participate only one or two times per year in each activity
 - The economy’s performance has a severe trickle down affect on recreation – poor performing economy leads to less disposable income by requiring individuals and families to dedicate larger sums of money to necessities and less to discretionary items
 - Men continue to outpace women in participatory categories – 63.7% of women participate in an activity at least once per year as compared to 64.2% of men
 - Female frequency of participation dropped from 38.3 outings in 2004 to 28.4 outings in 2005

1.4.1 ARIZONA’S OUTDOOR RECREATION TRENDS

Equipped with a vast physiographic canvas, Arizonans recreational opportunities are nearly limitless. Mountains, deserts, large metropolitan areas, and small towns all offer the prospect of recreation. With a large inventory of park lands and other venues, the market for outdoor recreation reaches beyond local residents and state borders. According to the Outdoor Industry Foundation’s The Active Outdoor Recreation Economy, outdoor recreation in Arizona supports 82,000 jobs across the state, generates nearly \$350 million in annual state tax revenues, and produces almost \$5 billion in annual retail sales and services.

Of the main active outdoor recreation activities surveyed by the Outdoor Industry Foundation, the most participated in activities were bicycling, trail usage, camping, and wildlife viewing (**Figure 9**).

Arizonans Participation in Active Outdoor Recreation; Activity	Number of Participants	% of Population*
Bicycling; Paved-road and Off-road	1,151,671	27.0%
Trails; Backpacking, Hiking, Rock climbing, and Running	1,164,256	27.0%
Camping; RV, Tent, and Rustic lodging	1,067,921	25.0%
Wildlife Viewing; Bird watching, etc	1,098,000	24.0%
Fishing; Fly and Non-fly	339,417	7.0%
Paddling; Canoeing, Kayaking, and Rafting	320,680	7.0%
Snow Sports; Skiing, Snowboarding, and Snowshoeing	284,229	7.0%
Hunting; Firearms and Bow	116,977	3.0%

Source: Outdoor Industry Foundation

**Notes:*

1. *Wildlife participation based on persons aged 16 and above*
2. *Non-wildlife participation based on persons aged 18 and above*
3. *Participation occurs from both in-state and out of state; % of population includes both*

Figure 9 - Arizona Outdoor Recreation Participation

Four of the top five outdoor recreational activities participated in on a national scale by persons six or older are shared by Arizonans. National rankings of outdoor recreation are:

1. Running/Jogging/Trail Running – 3.65 billion outings / 95 outings per runner/jogger (trail or road)
2. Bicycling (any type) – 2.82 billion outings / 66 outings per bicyclist
3. Fishing (any type) – 1.17 billion outings / 23 outings per angler
4. Skateboarding – 712 million outings / 64 outing per skateboarder
5. Wildlife Viewing (more than ¼ mile from vehicle/home) – 642 million outings / 31 outing per wildlife watcher

Although the state does offer numerous recreational venues, many indigenous to the state, frequent participation in outdoor recreation should not be expected on a large scale. The majority of all participants take part in outdoor activities 11 to 30 times per year; 49% of all persons 6 and older that participate in outdoor activities take part in 30 or less outings per year (**Figure 10**). Only 26% are participating two or more times per week.

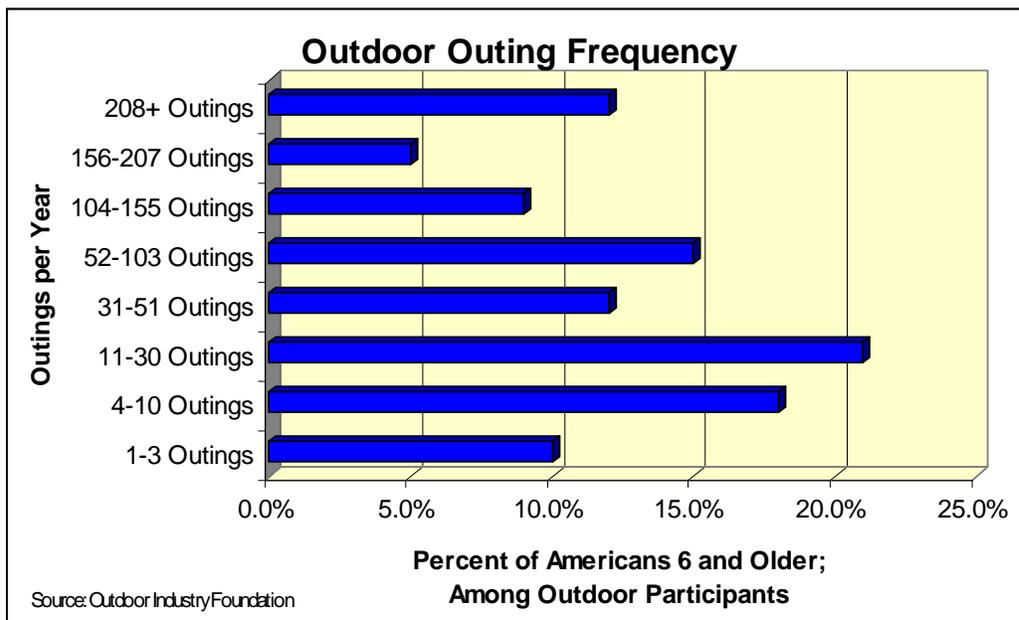


Figure 10 - Outings Frequency

As the frequency of participation begins to wane as a person ages – the percentage of young adults who take part in outdoor activities two or more times per week drops to 25% for young adults, a 30% decrease from youth rates – the scaling back begins earlier among female participants. While both genders have relatively high participatory rates between the ages of 6 and 12 (77% female participation rate; 79% male participation rate), female participation drastically drops for females aged 13-17 as opposed to the male counterpart (only 54% of 13-17 year-old females participate in an outdoor activity; 74% of 13-17 year-old males participate in an outdoor activity).

As with many experiences in life, as a participant ages the inclination to try new things diminishes. Youth participate in an average of 3.4 outdoor activities in a given year; this sampling decreases to an average of 2.0 different outdoor activities for those aged 65 and older. It is assumed that the experimental and enthusiastic abandon of youth enables them to find the activities that they truly enjoy, allowing them focus in on particular activities of interest in adulthood.

Some of the loss of outdoor recreation participants through the aging process can be attributed to the attrition by individuals to more traditional sports and indoor recreation activities. Although outdoor recreation remains higher than both team ball sports and indoor recreation for males until the early sixties, outdoor participation by women is eclipsed much earlier. Indoor fitness gains participants and doesn't relinquish them late in adulthood like outdoor recreation. By the mid-twenties, indoor fitness has reached parity with outdoor recreation, and is even more participated in amongst the female population.

As demonstrated earlier in this section with the most participated in activities for Arizonans, the potential for cross-over participation does exist. Bicycling and trail usage – the two most participated in outdoor recreation activities – can be recreated in an indoor or urban

setting. Taking part in “urban-associated” outdoor activities – complimentary activities – like skateboarding, running, and bouldering, can lead to an appreciation of being outdoors and higher fitness levels. These activities can also lead to an increased level of participation in “traditional” outdoor activities. Ultimately, the more active an individual can become, the greater the good. Encouraging any activity – outdoor, indoor, traditional, or novel – can lead to a healthier society and greater participation amongst all recreational activities.

1.4.2 MARICOPA COUNTY PARKS AND RECREATION TRENDS

Results of the 2005 Outdoor Recreation Participation Study, released in 2006, reveal that participation in outdoor activities increased – approximately two million more Americans participated in active outdoor activities compared to the previous year. However, the number of actual outings decreased. Participants appear to focus on low commitment activities that may be completed in a limited amount of time near their home.

County survey results reveal similar findings. Based on the on-site survey results of the 2005-2006 Maricopa County Parks Visitor Study, the average number of visits increased over the previous studies findings, but visitation frequency was down.

- The average number of visits by a visitor over the last 12 month period was up in 2006 to an average of 10.2 visits after experiencing a slight decrease in 2003
 - Frequency decreased from 10.8 annual visits in 2000 to 9.3 in 2003
- Repeat visitation fell by 1.6% in 2006 to 76.7% of total visitors
 - The county parks received a higher amount of use from repeat visitors in 2003 (78.3 percent) than they did in 2000 (74.8 percent)
 - Estrella Mountain Regional Park and Lake Pleasant Regional Park have the highest levels of repeat use

It appears that the County is only capturing 28.2% of the local market’s recreation needs. With an average number of visits to County parks reaching 10.2 in 2006, roughly 26 other recreational participation opportunities are being served by non-County parks and facilities.

- The average Maricopa County Household made 36.2 visits to public parks or outdoor recreation areas over the previous 12 months in Arizona

County parks ranked last in visitation by residents when comparing against all recreational service providers – only 30.7% of all residents reported visiting a County area.

- Parks and recreation areas managed by municipalities reported visitation by 67.5 percent of Maricopa County residents over the past year, followed by federal areas (49.4% of County resident utilization), state areas (43.6% of County resident utilization) and Maricopa County parks (30.7% of County resident utilization)

In accordance with the survey findings which indicate local visitation has begun to wane, both length of day use visits and length of overnight visits have increased. Extended lengths of stay would imply that out of market visitation is occurring and that the users are making sure they get a good experience in return for the distance traveled.

- Estrella Mountain, White Tanks, and Lake Pleasant Regional Parks demonstrated the strongest appeal as primary destination parks
- Overall visitation of the system in terms of a primary destination has been trending slightly downward over the most recent study period – County parks were likely the primary destination for 95.7% of the visitors in 2003 versus 93.6% in 2006
- Overnight visitation category has steadily increased its share during each of the last three surveys, rising from 20.3% of total system visitors (2000) to 24.7% of total system visitors (2003) to 31.3% of the sampled visitors in 2006
- Average number of hours for day users has increased from 3.1 in 2000 to 3.5 in 2006
- Average number of nights has increased from 4.86 in 2003 to 7.15 in 2006

The main reason for County resident’s lack of visitation to County parks is the lack of knowledge when it comes to services and offerings. The second reason for lack of visitation is travel distance required. According to a report conducted by the University of Colorado’s School of Business, on average, persons traveled 16.8 miles for recreation during the week, and increased their travel distance to 41.0 miles on weekends. More than 45% of the persons surveyed traveled fewer than 4 miles from home to recreate during the week (Monday through Thursday), and two-thirds stay within 10 miles of home. Travel distances increased on weekends with 54% of the respondents typically traveling at least 20 miles. The mode distance traveled for all respondents in the Maricopa County Parks Visitors Study was 20 miles.

- The top three reasons (constraints) given by residents for not visiting County parks are lack of knowledge of the park (22.6%), distance to the park (17.4%), and poor health/disability (11.4%)
 - Percent of respondents that reported distance as a constraint and the corresponding park site
 - Adobe Dam – 4.4%; on-site survey information not available
 - Cave Creek – 9.2%; mode distance traveled of 15 miles given during on-site survey
 - Estrella Mountain – 16.8%; mode distance traveled of 10 miles
 - Lake Pleasant – 15.4%; mode distance traveled of 20 miles given during on-site survey
 - McDowell Mountain – 9.5%; mode distance traveled of 30 miles given during on-site survey
 - Utery Mountain – 4.6%; mode distance traveled of 10 miles given during on-site survey
 - White Tank – 4.7%; mode distance traveled of 10 miles given during on-site survey

- Nearly 20% of those surveyed by the Colorado School of Business travel more than 100 miles on the weekend to recreate
 - Male respondents traveled an average of 2.9 miles more than females to recreate during the week and 4.4 miles more on weekends
 - Whites tend to travel approximately 9 miles further than Hispanic/Latino respondents to recreate during the week and nearly 14 more miles on weekends

County park participation could be in the beginning phases of a trend that will see even fewer participation opportunities originating from the local market. Based on survey findings, more participation is occurring by non-Arizonans during each study period.

- The residence of park visitors was fairly consistent across the first two studies, however, the 2006 study showed a significant growth in out-of-state visitors
- Visitation declined in persons originating in the City of Phoenix, Glendale, Mesa and other in-state visitors; about two-thirds of the 2006 visitation now comes from the Phoenix Metro area

Based on the Maricopa County Parks survey results, Lake Pleasant Regional Park was the most visited area of the County park system with 33.0% of all households reporting they had visited in the past 12 months. The least visited park, Buckeye Hills Regional Park with 1.9% of the households reporting visited in the past 12 months, is logical due to the limited development located on site. All told, 70% of all Maricopa County households reported visiting at least one County park over the past 12 months.

- Ranked in descending order of percent of County households having visited in the past 12 months:
 - Lake Pleasant Regional Park – 33.0% of the households visited the area in the past 12 months
 - Usery Mountain Regional Park – 18.3% of the households visited the area in the past 12 months
 - Estrella Mountain Regional Park – 17.2% of the households visited the area in the past 12 months
 - White Tank Mountain Regional Park – 16.2% of the households visited the area in the past 12 months
 - McDowell Mountain Regional Park – 14.6% of the households visited the area in the past 12 months
 - Cave Creek Regional Park – 11.5% of the households visited the area in the past 12 months
 - Spur Cross Ranch Conservation Area – 7.1% of the households reported visiting the area in the past 12 months
 - Adobe Dam Regional Park – 4.8% of the households visited the area in the past 12 months

- San Tan Mountain Regional Park – 4.1% of the households reported visiting the area in the past 12 months
- Buckeye Hills Regional Park – 1.9% of the households visited the area in the past 12 months

1.4.3 NATURE BASED OUTDOOR TOURISM TRENDS IN WESTERN AND MID-WESTERN MSA

A study performed in conjunction by USDA Forest Service and the Southern Research Station of the eight western and mid-western metropolitan statistical areas (MSA) found that larger percentages of Denver, Minneapolis, Phoenix, and Seattle populations participate in nature-based tourism activities relative to all the major western metro areas combined. Phoenix residents participate at relatively high rates only in the two hunting activities – big game and small game hunting.

Relative to total population of all persons 16 or older, western MSA residents participate at notably higher rates in day hiking, developed camping, driving off road, primitive camping, coldwater fishing, backpacking, and small game hunting. The only notably lower participation rate for western MSA residents is canoeing.

The table shown in **Figure 11** portrays twenty nature-based outdoor tourism activities. They are listed in order by percentage of the Phoenix MSA population sixteen or older who participated between 2000 and 2004 (first column in the table). The numbers in the column second from the right depict the ratio of the percentage of people in each western metro area who participate in an individual activity divided by the overall percentage participating across the eight western metro areas combined; converting the data to ratios more easily illustrates which activities and which metro areas have larger or smaller percentages of people participating. Especially noteworthy are ratios larger than one point five, which indicate much higher percentages of a particular metro area population participating, or a ratio less than zero point seven, indicating a much lower participation rate.

As mentioned previously, the only two categories in which the Phoenix MSA participate at higher levels than the other MSA's are big and small game hunting; however, these two activities are fairly in-line with national averages. Two categories which have participation levels much lower than all comparable western and mid-western MSA's are canoeing and cross country skiing. Even though big and small game hunting surveyed well for participation in the Phoenix MSA, no activity lead all eight surveyed MSA's in participation – assumedly due to the smallest total populace among the eight surveyed – and only two activities finished second in total participation among all eight MSA's – small game hunting and off road driving.

Four activities in the Phoenix MSA have a greater percent of total population participation than both the national and western MSA counterparts. These four activities not only correspond with the County Park System's mission, but exemplify the reputation that Arizonans in general have embraced:

- Visiting wilderness or primitive areas – 7% and 9% higher for the Phoenix MSA than both the western MSA's and national averages, respectively

- Day hiking – 3% and 8% higher than the western MSA’s and national averages, respectively
- Primitive camping – Phoenix MSA participation is 5% higher participation than both the western MSA’s and national averages; however, developed camping is nearly equally less than the western MSA’s and national averages
- Backpacking – 2% and 5% greater participation of the total population that the western MSA’s and national averages experience

The complete list of outdoor activity participation trends demonstrate the magnitude, and implied importance, associated with many activities available at County parks. The complete list is presented below.

Activity	Phoenix MSA % of Pop Participating 2000-2004	U.S. Total % of Pop Participating 2000-2004	Combined Western MSA % of Pop Participating 2000-2004	Phoenix MSA Ratio of % of Participation**	Rank of Phoenix MSA Ratio to Western MSA Ratios
Picnicking	49%	54.2%	53.7%	0.91	T-6
Day hiking	44%	32.6%	41.5%	1.05	4
View/photograph other wildlife	41%	45.2%	40.9%	1.00	5
Visit a wilderness or primitive area	41%	32.6%	34.4%	1.19	3
Swimming in lakes and streams, etc.	38%	42.3%	39.4%	0.95	T-6
View/photograph birds	29%	32.5%	29.1%	0.99	4
Developed camping	25%	26.7%	29.0%	0.88	6
Drive offroad	25%	18.6%	17.5%	1.40	2
Primitive camping	21%	16.1%	15.9%	1.31	3
Warmwater fishing	18%	22.4%	14.6%	1.23	4
Mountain biking	18%	20.9%	22.8%	0.79	7
Coldwater fishing	16%	13.4%	13.0%	1.19	3
Backpacking	15%	10.5%	13.3%	1.15	4
Rafting	12%	10.0%	8.6%	1.41	3
Horseback riding on trails	8%	7.7%	7.6%	1.05	4
Small game hunting	8%	7.1%	4.1%	2.02	2
Big game hunting	7%	8.4%	4.0%	1.65	3
Downhill skiing	7%	8.4%	10.1%	0.72	6
Canoeing	4%	9.7%	6.6%	0.55	7
Cross country skiing	1%	3.7%	3.6%	0.28	7

Figure 11 - Western and Mid-Western MSA Outdoor Activity Participation

1.4.4 RETIREES PARTICIPATION IN OUTDOOR ACTIVITIES

Retirees sixty-five and older remain active in many activities well into their senior years. Just under thirty-five million Americans, or about one of every eight persons (12.4%), were sixty-five years or older at the time of the 2000 Census. Over ninety percent of these older Americans are retired; almost all are retired by age seventy-five.

For purposes of this study, retirees were broken into three age groups, sixty-five to seventy-four, seventy-five to eighty-four, and eighty-five and above; data was gathered from the National Survey on Recreation and the Environment (NSRE). Across all the activities surveyed, with the only exception being gardening or landscaping for pleasure, the percentage of retirees who participate in an activity is less than that for those people under age sixty-five. With a few exceptions among activities, participation percentage falls from age sixty-five to age eighty-five and above. For the more passive activities, such as walking, family gatherings outdoors, sightseeing and viewing/photographing wildlife and flowers, the decrease with age is gradual. With the more physically demanding activities, such as swimming, hiking and mountain biking, the decrease in percentage participating sharply

increases with age; however, some percentage of even the oldest of retirees participate across most activities, regardless of how physically demanding they are.

Although age does play a role in the ability to participate in all activities, eleven of activities surveyed by NSRE illustrate the enduring quality regardless of age, such as:

- Walking for pleasure
- Family gatherings
- Gardening and landscaping for pleasure
- View/photograph natural scenery
- Visit nature centers, etc.
- Driving for pleasure
- Picnicking
- Sightseeing
- Visit historic sites
- View/photograph other wildlife
- View/photograph wildflowers, trees, etc.

As the retiree population grows in future years, accessible opportunities for these popular activities should be accommodated.

1.4.5 CONCLUSION

Rapid growth due to in-migration coupled with a relatively young and diverse population will require Maricopa County Parks and Recreation Department to reposition itself over the next decade if the Department is to be successful in providing relevant services to the changing demographic profile of residents. Shifts in recreational participatory patterns and increasing public sentiment to reintroduce children and adults to nature will also require a shift in developing and providing programs and opportunities that engage visitors while promoting a strong environmental ethic. The key to the future viability of the Department will be an entrepreneurial spirit of the management and staff – the ability of the Department to design, implement, and bestow programs and services across all age segments of the population with the flexibility to maintain an evolving target market.