



Town of Oro Valley Parks and Recreation Master Plan – Phase One 2020



Table of Contents

CHAPTER ONE – EXECUTIVE SUMMARY	1
1.1 PROJECT PURPOSE AND GOAL	1
1.2 PROJECT PROCESS.....	1
1.3 ORO VALLEY MASTER PLAN ORGANIZATION.....	2
1.4 SUMMARY OF KEY FINDINGS AND RECOMMENDATIONS.....	2
CHAPTER TWO – ECONOMIC IMPACT OF PARKS AND RECREATION	5
2.1 KEY FINDINGS FROM THE NATIONAL STUDY	6
2.2 WHAT THE RESULTS MEAN	6
2.3 ADDITIONAL ECONOMIC BENEFITS	6
2.4 SUMMARY.....	7
CHAPTER THREE - COMMUNITY PROFILE.....	8
3.1 DEMOGRAPHIC ANALYSIS.....	8
3.2 METHODOLOGY	8
3.3 RACE AND ETHNICITY DEFINITIONS	9
3.4 ORO VALLEY POPULACE	10
3.5 TAPESTRY SEGMENTATION	14
CHAPTER FOUR - RECREATION TRENDS ANALYSIS	18
4.2 NATIONAL AND REGIONAL PROGRAMMING TRENDS	29
4.3 LOCAL SPORT AND MARKET POTENTIAL.....	32
4.4 SUMMARY	34
CHAPTER FIVE - COMMUNITY NEEDS ASSESSMENT	35
5.1 QUALITATIVE INPUT SUMMARY	35
5.2 INTECEPT SURVEY FINDINGS	36
5.3 PROJECT WEBSITE INPUT	37
5.4 ON-LINE SURVEY	38
5.5 STASTICALLY VALID SURVEY.....	41
5.6 NEEDS ASSESSMENT PRIORITY RANKINGS	57
5.7 SUMMARY	58
CHAPTER SIX - PARK AND FACILITY ASSESSMENTS	59
6.1 PARK CLASSIFICATION AND PARK DESIGN PRINCIPLES	59
6.2 DEVELOPED PARK/FACILITY INVENTORY AND ASSESSMENT	66

CHAPTER ONE – EXECUTIVE SUMMARY

1.1 PROJECT PURPOSE AND GOAL

The purpose of Town of Oro Valley’s Needs Assessment Phase One is to identify the needs of the community that create the foundation for the development of a roadmap for future development of recreational facilities and opportunities for the Town over the next 10 years. This plan is based on recognized park planning principles and standards, and reflects input from residents and stakeholders in Oro Valley, Town staff, the Parks and Recreation Advisory Board and the Town Council.

The Town of Oro Valley Parks and Recreation Needs Assessment Phase One focuses on identifying the Town’s current and future recreation needs to aid Town staff and decision-makers in providing and expanding and equitable distribution of recreational facilities and opportunities to Town of Oro Valley residents and stakeholders. Primary outcomes of this phase of the Needs Assessment include:

- Evaluation of the existing parks, trails and open space system;
- Documenting priorities and needs of the current and projected population growth based on data-driven input

1.2 PROJECT PROCESS

The foundation of the Master Plan was to incorporate a variety of data and mine local knowledge using a comprehensive stakeholder participation process and community surveys. The stakeholder input process incorporated a variety of methods that included interviews, focus group meetings, and public forums/presentations. The data generated from these critical community interactions helped to define the true unmet recreation needs of the community, as well as address key operational issues, provide recommendations for business-related changes, and strategize on how to best position the Town and Parks and Recreation Department to move forward for optimum results.

1.2.1 PLANNING EFFORTS CONSIDERED

A number of local planning efforts helped guide the development of Phase One of the Master Plan. The following highlights some of these efforts:

- Your Voice, Our Future General Plan 2016
- Park Development Guidelines
- Department Policies and Procedures

1.2.2 ELEMENTS OF THE PLAN

The planning process for Phase One of the *Master Plan* was completed with Town staff and included:

- The collection of available information;
- Data analysis to determine inventory and condition of current facilities;

The data collected from the staff and onsite facility assessments will be utilized to identify key factors, issues, and concerns regarding the parks and recreation system and how the Town’s Parks and Recreation Department manages operations.



1.3 ORO VALLEY MASTER PLAN ORGANIZATION

Phase One of the Master Plan presents the overall analysis of community input and a current assessment of the parks and recreation system. This study begins with an Executive Summary that provides an overview, and the following sections respond to the primary outcomes and determination of needs.

1.4 SUMMARY OF KEY FINDINGS AND RECOMMENDATIONS

Following the assessment of the Town's parks and recreation system, a variety of key findings were identified to support the implementation of the *Master Plan*. These key findings help to guide decision-making for the next five to ten years.

1.4.1 MARKET ANALYSIS KEY FINDINGS

- **POPULATION:** The population is increasing and is projected to experience 20% population growth over the next 15 years. With a modestly growing population, park and recreation services will need to strategically invest, develop, and maintain parks and facilities in relation to current and future housing development areas.
- **AGE SEGMENTATION:** Oro Valley currently has a very broad and slightly unbalanced age segmentation with the largest group being 55+ with the second largest group being 0-17. Over the next 15 years, the 55+ age segment, which currently is the largest age segment in Oro Valley, will increase by 3.6% while those who are 0-17 are projected to decrease by 2.2%, making up 24.7% of the population by 2034. This is assumed to be a consequence of a vast amount of the Baby Boomer generation shifting into the senior age segment.

This is significant as providing access to services and programs will need to be focused on multitude of age segments simultaneously as age segmentation is a strong determinant of recreational preferences. Equal distribution across all age segments will require the Town to continue to provide programs, services, parks and facilities that appeal to all residents of the community.

- **RACE AND ETHNICITY:** A homogenous population will likely focus the Town on providing traditional programming and service offerings while always seeking to identify emerging activities and sports.
- **HOUSEHOLDS AND INCOME:** With median and per capita household income averages well above state and national averages, it is important for the Town to prioritize providing offerings that are first class with exceptional customer service while seeking opportunities to create revenue generation.
- **TAPESTRY SEGMENTATION:** Highly unique tapestry segmentation that indicates that Oro Valley is comprised primarily of residents that are approaching or in retirement.

1.4.2 COMMUNITY INPUT KEY FINDINGS

Input from the community confirmed that Oro Valley's parks are loved by many, but there are gaps in service and amenities and additional Town investment is needed to maintain and develop new parks for the growing community. Participants see the system as one that is well-maintained with great staff. They also enjoy the numerous programs and amenities offered. Unmet needs exist as the demand for select services is currently outweighing the available facilities and/or existing amenities. The following summarizes the themes of community input:

ECONOMIC DEVELOPMENT THROUGH PARK DEVELOPMENT

Opportunity exists for park development to enhance and/or advance economic development. There is also an opportunity for economic development to enhance and support park development.

- Parks and recreation can play a significant role in business attraction, residential development, and the overall quality of life attributes desired by the community.
- Investment in parks reflects the community's value set and the Town's overall attitude of being an active player in the betterment of the community.
- The completion of Naranja Park and the reinvestment in Steam Pump Ranch can potentially serve as economic catalysts.
- Generalized opportunities to enhance the economic impact via tourism were cited through a number of existing Town offerings, including, but not limited to golf, pickleball, tennis, athletic field sports, competitive swimming and festivals/events.

INVESTING IN THE EXISTING PARKS SYSTEM

- Continue to focus on reinvesting in and maintaining existing parks.
- Opportunities exist to, in part, help meet the recreational needs of the community, in partnership with the development community, the Amphitheater Unified School District.

OPEN SPACE

- Desire to preserve defunct the Rancho Vistoso golf course, at least in part, as an open space conservation area was consistently expressed through all community input opportunities.

TRAILS AND CONNECTIVITY

- Desire for a connected, accessible recreational trail system that also supports active transportation and safe routes to school.

ADVOCACY AND AWARENESS

- Increased and targeted Communication/Marketing is needed to develop more advocacy for, and the awareness of, the parks and recreation system.

FUNDING THE PARKS AND RECREATION SYSTEM

- Multiple fiscally sustainable funding strategies, without increasing taxes, may be required to meet the needs of the community over the next 10 years.
- Continue to secure funding through grant programs will be critical for funding park development over the next 10 years.



1.4.3 PROGRAM/SERVICE AND PARK/FACILITY PRIORITY RANKINGS

The purpose of the Program/Service and Park/Facility Priority Rankings is to provide a prioritized list of facility/amenity needs and recreation program and service needs for the community served by the Town. The analysis completed evaluated both quantitative and qualitative data including the following community engagement initiatives that occurred January-May 2020:

- Master Plan Project Website January - May, 2020 - www.planyourparksov.com
 - 927 comments received
- Focus Group and Stakeholder Meetings - January 23rd and 24th, 2020
 - 37 participants
- Town Hall Meeting - January 23rd, 2020
 - 130 participants
- Intercept Surveys - Nine dates - February - March, 2020
 - 404 participants
- Statistically Valid Survey - February - April, 2020
 - 443 completed surveys representing
- On-Line Survey - April - May, 2020
 - 372 completed surveys

The results of the priority rankings are tabulated into three categories: High Priority (top third), Medium third) and are summarized below:

Recreation Program/Service	Priority
Community special events	High
Fitness & wellness programs	
Adult learning classes	
Senior programs & services	
Art classes	
Walking/jogging/running/cycling clubs	Medium
Performing arts programs	
Golf lessons/clinics	
Environmental education programs	
Pickleball lessons/clinics	
Open swim	Low
Water fitness programs/lap swimming	
Weightlifting/bodybuilding programs	
Running events	
Reservation/rental of picnic shelters	
After school programs/out of school camps	
Tennis lessons & leagues	
Family oriented programs	
Bicycle lessons & clubs	
Learn to swim programs	
Volleyball programs	
Soccer programs	
Programs for people with special needs	
Reservation/rental of indoor meeting space	
Archery	
Basketball programs	
Sand volleyball programs	
Recreation/competitive swim team	
Gymnastics	
Softball programs	
Reservation/rental of athletic fields	
Football programs	
Baseball programs	
Lacrosse programs	

Facility/Amenity	Priority
Trails (natural surface)	High
Trails (multi use paved)	
Open space conservation areas/trails	
Neighborhood parks	
Restroom buildings	
Large community parks	Medium
Performing Arts Venue (stage)	
Community gardens	
Golf	
Dog parks (off leash)	
Recreation/community center	Low
Playgrounds	
Pavilions/picnic sites	
Amphitheater	
Aquatics facility recreation/lap pool	
Aerobics/dance rooms/dance floors	
Aquatics facility splash pad/water play features	
Pickleball courts	
Environmental education center	
Disc golf course	
Tennis courts	
Skateboarding/bicycle parks (concrete)	
Banquet/meeting rooms	
Basketball/volleyball courts inside	
Baseball/softball fields	
Sand volleyball courts	
Remote control (RC) hobby facility	
Football/soccer/lacrosse fields	
Dirt bicycle pump/BMX track	
Basketball/volleyball courts outside	
Archery range	
Aquatics facility competition pool	

CHAPTER TWO – ECONOMIC IMPACT OF PARKS AND RECREATION

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

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

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





2.1 KEY FINDINGS FROM THE NATIONAL STUDY

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

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

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

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

2.2 WHAT THE RESULTS MEAN

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

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

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

2.3 ADDITIONAL ECONOMIC BENEFITS

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

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

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

2.4 SUMMARY

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

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



CHAPTER THREE - COMMUNITY PROFILE

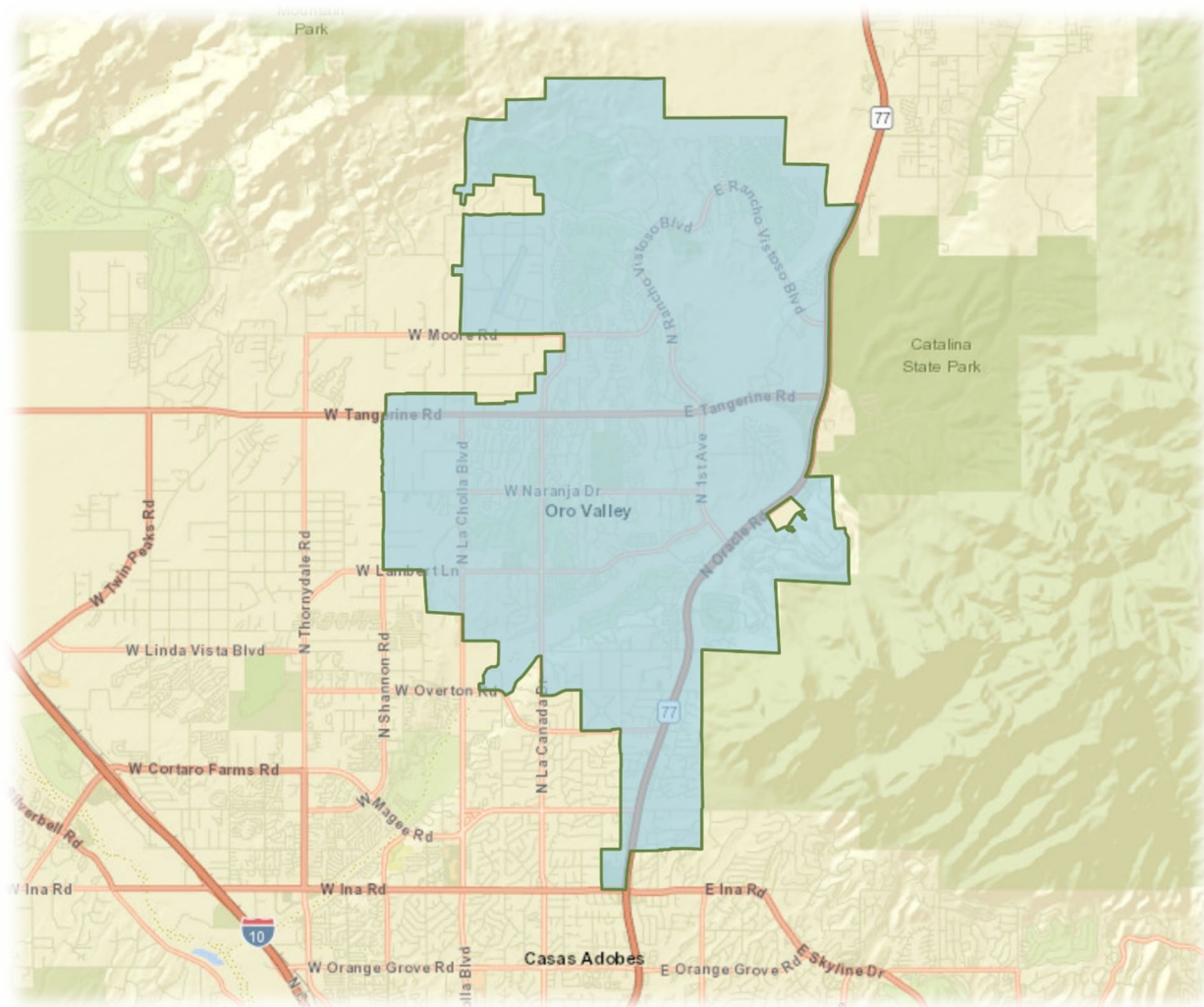
3.1 DEMOGRAPHIC ANALYSIS

The Demographic Analysis provides an understanding of the population of the Town of Oro Valley, Arizona. This analysis reflects the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

Future projections are all based on historical patterns. Unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

3.2 METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from ESRI, the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in November 2019 and reflects actual numbers as reported in the 2010 Censuses, and estimates for 2019 and 2024 as obtained by ESRI. Straight line linear regression was utilized for projected 2029 and 2034 demographics. This information will help support the development of the Town's Comprehensive Parks and Recreation System Plan.



3.3 RACE AND ETHNICITY DEFINITIONS

The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis as follows:

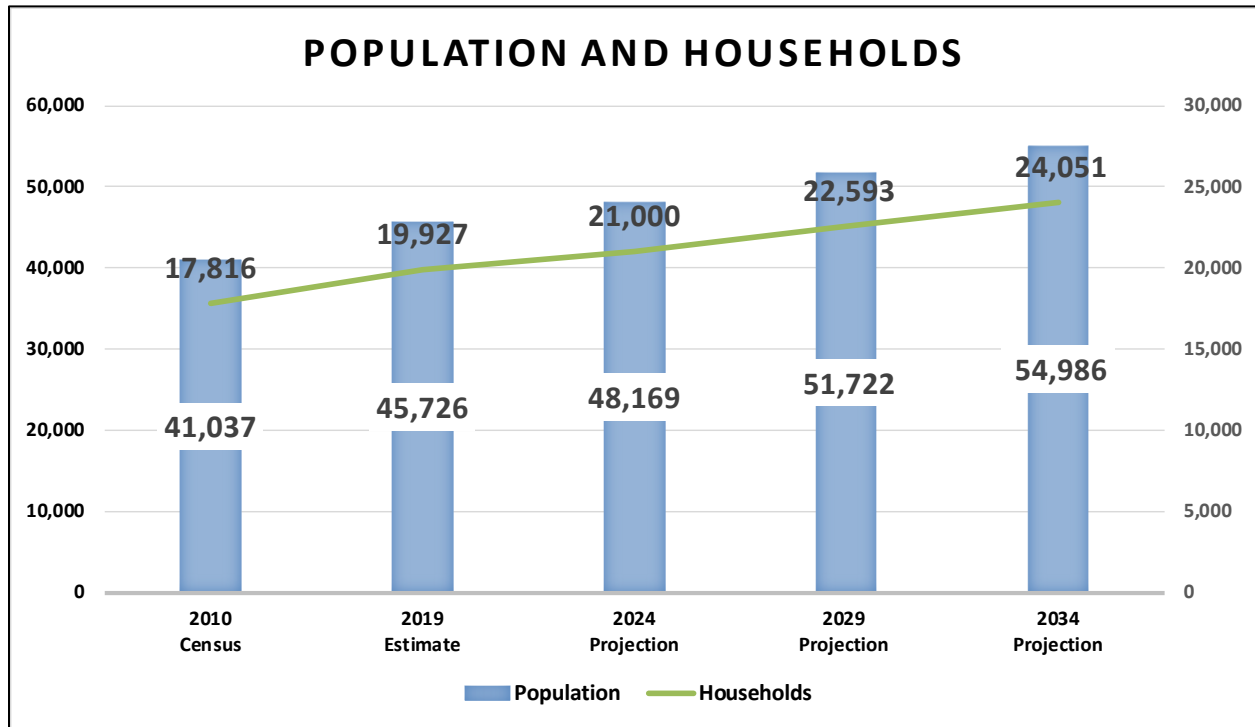
- American Indian - This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian - This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black - This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander - This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White - This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Some Other Race - Includes all other responses not included in the "White", "Black or African American", "American Indian and Alaska Native", "Asian" and "Native Hawaiian and Other Pacific Islander" race categories described above.
- Two or more races - People may have chosen to provide two or more races either by checking two or more race responses
- Hispanic or Latino - This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race



3.4 ORO VALLEY POPULACE

3.4.1 POPULATION

The Town's population has experienced a growing trend in recent years and is estimated at 45,726 individuals in 2019. Projecting ahead, the total population is expected to continue to grow over the next 15 years. Based on predictions through 2034, the Town is expected to have 54,986 residents living within 24,051 households - this equates to a household size of 2.29.

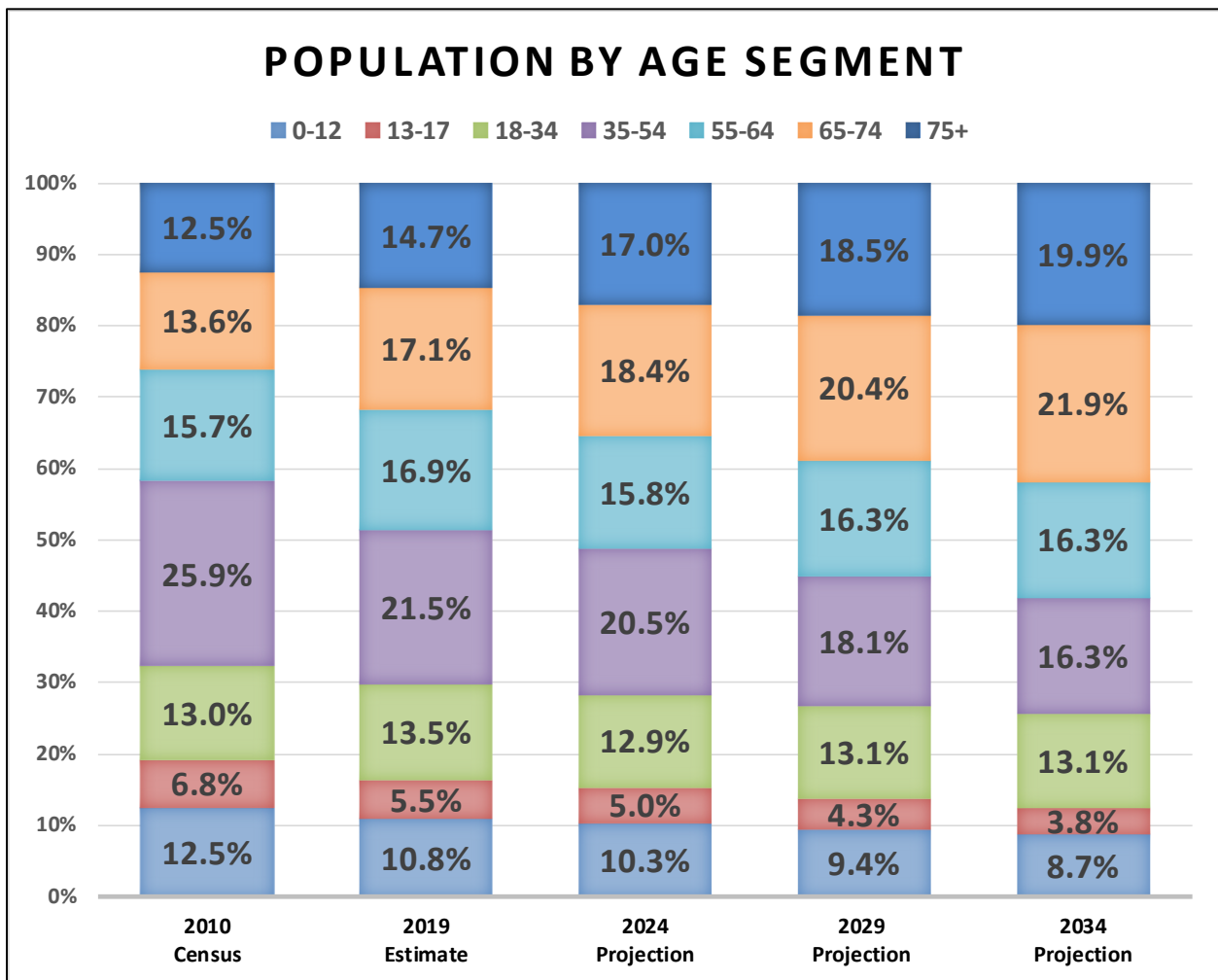


3.4.2 AGE SEGMENT

Evaluating the population by age segments, the Town exhibits an unbalanced distribution among the major age segments. Currently, the largest grouping of age segments is the 55+ segment, making up 48.7% of the population.

Looking forward, the overall age composition of the population within the Town is projected to age significantly. Over the next 15 years, the 55+ age segment, which currently is the largest age segment in Oro Valley, will increase by 9.4% while all other major age segments are projected to decrease. This is assumed to be a consequence of a vast amount of the Baby Boomer generation shifting into the senior age segment and the overall attraction of Oro Valley to retirees.

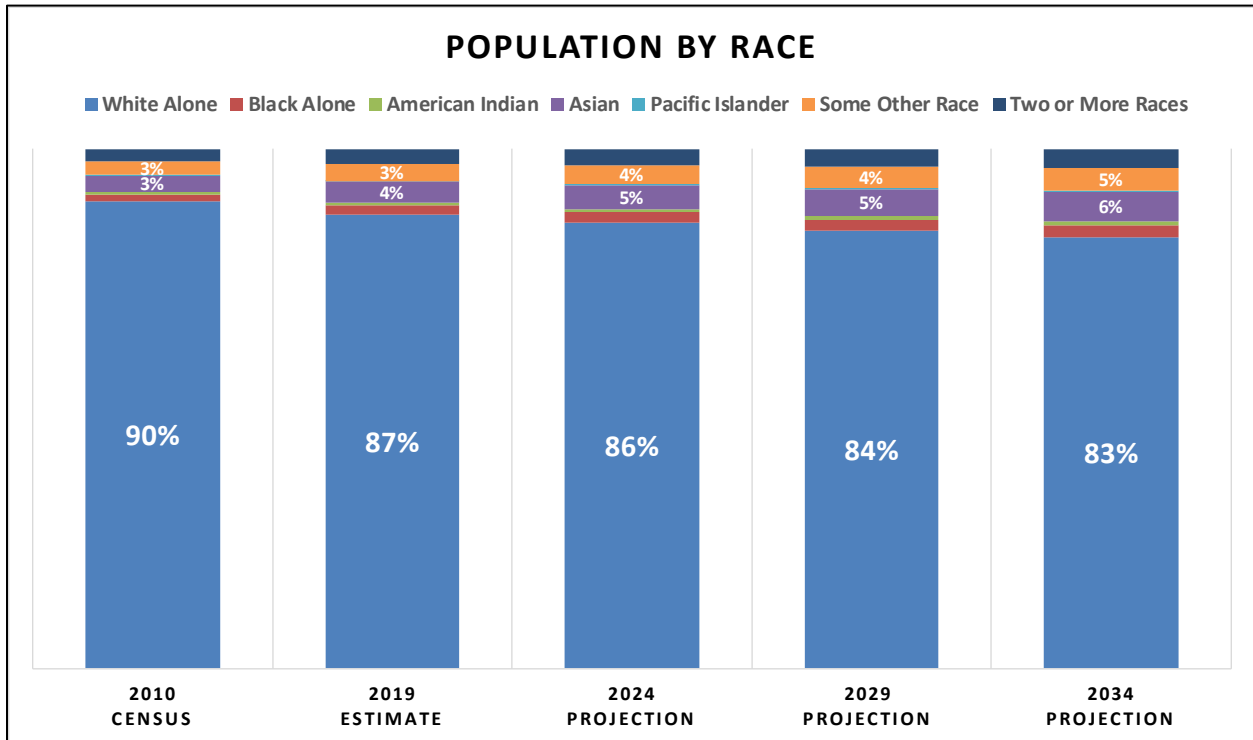
Given the differences in how the active adults (55 and older) participate in recreation programs, the trend is moving toward having at least three different program age segments for older adults. When updating the park and recreation system, the Town should evaluate recreation experiences that would cater to active adults who are 55-64, 65-74, and 75+ age segments.



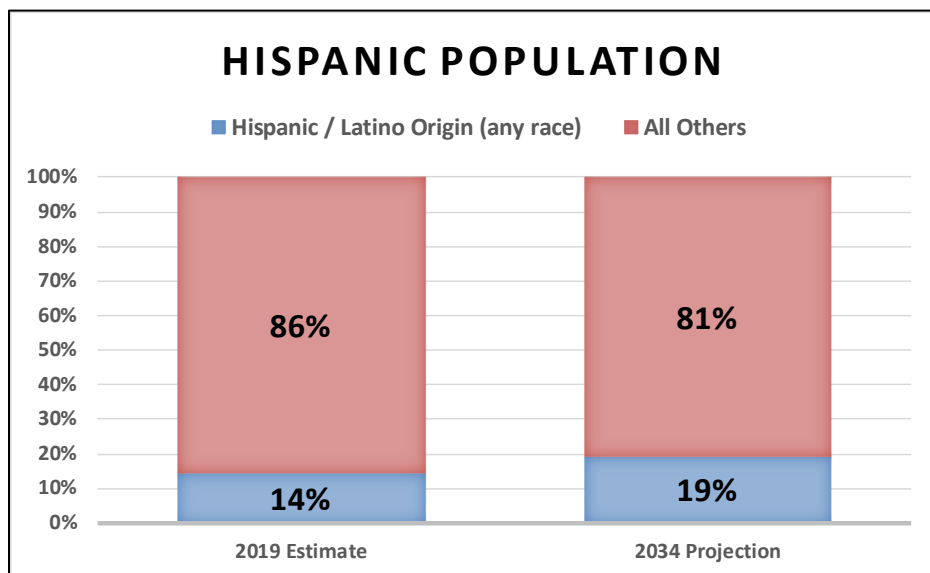


3.4.3 RACE AND ETHNICITY

In analyzing race, the Town's current population is not highly diverse. The 2018 estimates show that 87% of the Town's population falls into the White Alone category, while the Asian category (4%) represents the largest minority. The predictions for 2034 expect that the Town's population by race will diversity slightly with a decrease in the White Alone population by approximately 4% while the Asian and Some Other Race categories will increase by 2% each.

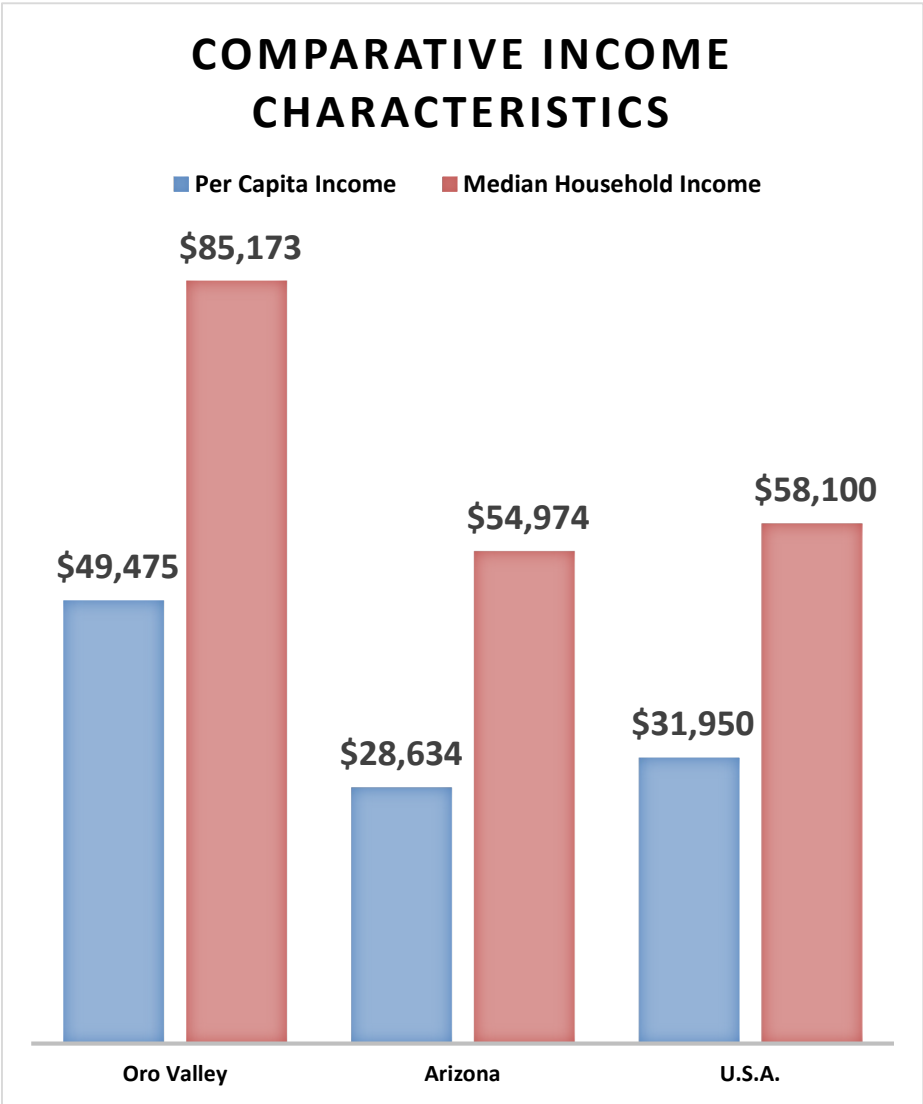


Based on the 2019 estimate, those of Hispanic/Latino origin represented 14% of the Town's total population. The Hispanic/Latino population is expected to experience a slight increase to 19% by 2034.



3.4.4 HOUSEHOLDS AND INCOME

The Town’s per capita and median household income levels are well above that of state and national averages.





3.5 TAPESTRY SEGMENTATION

Tapestry segmentation provides an accurate, detailed description of Oro Valley's residents in which distinctive lifestyle segments are identified based on their socioeconomic and demographic composition.

Many jurisdictions have 10+ tapestry segments that make up the majority (50%+) of its population. Oro Valley has five segments that comprise 78.4% of its population. The five tapestry segments that make up a majority of the Town's population are illustrated in the chart below as well as how they compare to the United States.

Tapestry Segment	Descriptor	Household Size	Median Age	Median Household Income	Percent of Town Households (2018)	Percent of US Households (2018)
Exurbanites	Active in their communities, generous in their donations, and seasoned travelers. Expansive home style in less crowded neighborhoods. Lifestyle is both affluent and urbane.	2.5	51.0	\$103,400	32.9%	1.9%
Golden Years	Independent, active seniors nearing the end of their careers or already in retirement. Actively pursuing travel, sports, dining out, museums, and concerts. Focused on physical fitness, and enjoying their lives.	2.06	52.3	\$71,700	15.7%	1.3%
The Elders	Favor communities designed for senior or assisted living. Housing varies from mobile homes to single-family residences to high-rise apartments. These seniors are informed, independent, and involved.	1.68	72.3	\$42,800	11.2%	0.7%
Silver & Gold	Most affluent senior market and growing. Affluence provides the opportunity to retire to sunnier climates that feature exclusive communities. Possess free time, stamina, and resources to enjoy the good life.	2.03	63.2	\$72,100	9.9%	0.8%
Savvy Suburbanites	Well educated, well read, and well capitalized. Suburban lifestyle includes home remodeling and gardening plus sports and exercise. Enjoy good food and wine, plus cultural events.	2.85	45.1	\$108,700	8.7%	3.0%
Subtotal					78.4%	7.7%

Simply, the make-up of the Oro Valley is very unique. The tapestry segmentation data is useful information that can assist the department in better understanding the community that they serve.

The following provides a brief description of the five largest tapestry segments in Oro Valley.

3.5.1 EXURBANITES

Exurbanites residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts, but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane.

MEDIAN AGE: 51

MEDIAN HOUSEHOLD INCOME: \$103,400

MARKET PROFILE:

- Prefer vehicles are late model luxury cars or SUVs.
- They are active supporters of the arts and public television/radio.
- Attentive to ingredients, they prefer natural or organic products.
- Gardening and home improvement are priorities.

- Financially active with wide-ranging investments.

3.5.2 GOLDEN YEARS

Independent, active seniors nearing the end of their careers or already in retirement best describes *Golden Years* residents. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums, and concerts. They are involved, focused on physical fitness, and enjoying their lives. This market is smaller, but growing, and financially secure.

MEDIAN AGE: 52

MEDIAN HOUSEHOLD INCOME: \$71,700

MARKET PROFILE:

- Avid readers, they regularly read daily newspapers, particularly the Sunday edition.
- Subscribe to cable TV; news and sports programs are popular.
- Use professional services to maintain their homes inside and out and minimize their chores.
- Leisure time is spent on sports (tennis, golf) or simple exercise like walking.
- Good health is a priority; Healthy eating, coupled with vitamins and dietary supplements.
- Active social lives include travel, especially abroad, plus going to concerts and museums.
- Residents maintain actively managed financial portfolios

3.5.3 THE ELDERS

With a median age of 72.3 years, this is Tapestry Segmentation's oldest market. *The Elders* residents favor communities designed for senior or assisted living, primarily in warmer climates with seasonal populations. Most of these householders are homeowners, although their housing varies from mobile homes to single-family residences to high-rise apartments. These seniors are informed, independent, and involved.

MEDIAN AGE: 72

MEDIAN HOUSEHOLD INCOME: \$42,800

MARKET PROFILE:

- Vehicles are just a means of transportation, but their first choice is luxury sedans.
- Banking is commonly done in person; shopping is by phone or in person.
- Shopping includes apparel and exercise equipment.
- Avid readers, with audio books and e-readers. Newspapers and magazines are staples for news and entertainment. Cable TV is also a must, primarily watching news or movie channels, but also golf, weather, and history channels.
- Sociable seniors, partial to a variety of clubs and organizations and generous with their time and support.



3.5.4 SILVER & GOLD

This is the most affluent senior market and is still growing. The affluence of *Silver and Gold* has afforded the opportunity to retire to sunnier climates that feature exclusive communities and vacation homes. These consumers have the free time, stamina, and resources to enjoy the good life.

MEDIAN AGE: 63

MEDIAN HOUSEHOLD INCOME: \$72,100

MARKET PROFILE:

- Partial to luxury cars or SUVs; highest demand market for convertibles.
- Maintain a regular exercise regimen and pay attention to healthier eating habits.
- Pursue the luxuries that well-funded retirement affords: an active social life, travel, hobbies, and sports (especially golf) and liberal use of home maintenance services to minimize chores.
- Avid readers of newspapers, magazines, and books.
- Generous supporters of charitable organizations.

3.5.5 FRESH AMBITIONS

Residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the Town's cultural events.

MEDIAN AGE: 45

MEDIAN HOUSEHOLD INCOME: \$108,700

MARKET PROFILE:

- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
- Gardening and home remodeling are priorities, usually Do It Yourself.
- There is extensive use of housekeeping and personal care services.
- Foodies: They like to cook and prefer natural or organic products.
- These investors are financially active; not afraid of debt.
- Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.

ORO VALLEY DEMOGRAPHIC IMPLICATIONS

The following implications are derived from the analyses provided above.

POPULATION

- The population is increasing and is projected to experience 20% population growth over the next 15 years.
- With a modestly growing population, park and recreation services will need to strategically invest, develop, and maintain parks and facilities in relation to current and future housing development areas.

AGE SEGMENTATION

- Oro Valley currently has a very broad and slightly unbalanced age segmentation with the largest group being 55+ with the second largest group being 0-17.
- Over the next 15 years, the 55+ age segment, which currently is the largest age segment in Oro Valley, will increase by 3.6% while those who are 0-17 are projected to decrease by 2.2%, making up 24.7% of the population by 2033.
- This is assumed to be a consequence of a vast amount of the Baby Boomer generation shifting into the senior age segment.
- This is significant as providing access to services and programs will need to be focused on multitude of age segments simultaneously as age segmentation is a strong determinant of recreational preferences.
- Equal distribution across all age segments will require the Town to continue to provide programs, services, parks and facilities that appeal to all residents of the community.

RACE AND ETHNICITY

- A homogenous population will likely focus the Town on providing traditional programming and service offerings while always seeking to identify emerging activities and sports.

HOUSEHOLDS AND INCOME

- With median and per capita household income averages well above state and national averages, it is important for the Town to prioritize providing offerings that are first class with exceptional customer service while seeking opportunities to create revenue generation.

TAPESTRY SEGMENTATION

- Highly unique tapestry segmentation that indicates that Oro Valley is comprised primarily of residents that are approaching or in retirement.



CHAPTER FOUR - RECREATION TRENDS ANALYSIS

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

4.1.1 METHODOLOGY

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

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



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

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

CORE VS. CASUAL PARTICIPATION

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

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

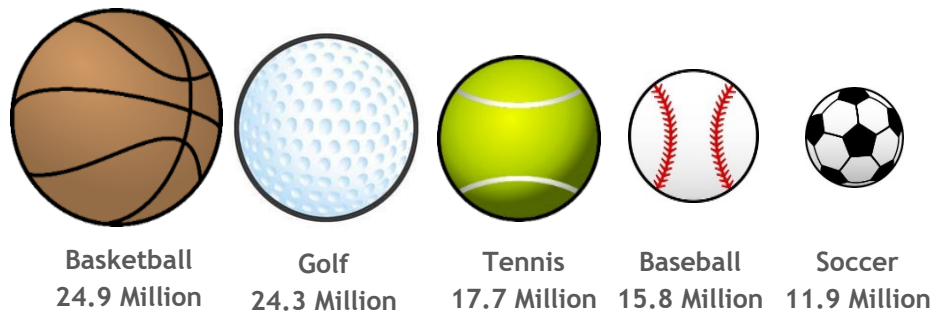
4.1.2 NATIONAL SPORT AND FITNESS PARTICIPATORY TRENDS

NATIONAL TRENDS IN GENERAL SPORTS

PARTICIPATION LEVELS

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

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



FIVE-YEAR TREND

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

ONE-YEAR TREND

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

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

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



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

NATIONAL TRENDS IN GENERAL FITNESS

PARTICIPATION LEVELS

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



**Fitness
Walking**
111.4 Million



Treadmill
56.8 Million



**Dumbbell
Free Weights**
51.4 Million



**Running/
Jogging**
49.5 Million



**Stationary
Cycling**
37.1 Million

FIVE-YEAR TREND

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

ONE-YEAR TREND

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

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

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



Town of Oro Valley Parks and Recreation

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

NATIONAL TRENDS IN OUTDOOR RECREATION

PARTICIPATION LEVELS

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



Hiking
(Day)
49.7 Million



Bicycling
(Road)
39.4 Million



Fishing
(Freshwater)
39.2 Million



Camping
(<¼mi. of Car/Home)
28.2 Million



Camping
(Recreational Vehicle)
15.4 Million

FIVE-YEAR TREND

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

ONE-YEAR TREND

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

CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

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



Town of Oro Valley Parks and Recreation

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

NATIONAL TRENDS IN AQUATICS

PARTICIPATION LEVELS

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



FIVE-YEAR TREND

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

ONE-YEAR TREND

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

CORE VS. CASUAL TRENDS IN AQUATICS

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

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



NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

PARTICIPATION LEVELS

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



Kayaking
11.4 Million



Canoeing
9.0 Million



Snorkeling
7.7 Million



Jet Skiing
5.1 Million



Sailing
3.6 Million

FIVE-YEAR TREND

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

ONE-YEAR TREND

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

CORE VS. CASUAL TRENDS IN WATER SPORTS/ACTIVITIES

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

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



NON-PARTICIPANT INTEREST BY AGE SEGMENT

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

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

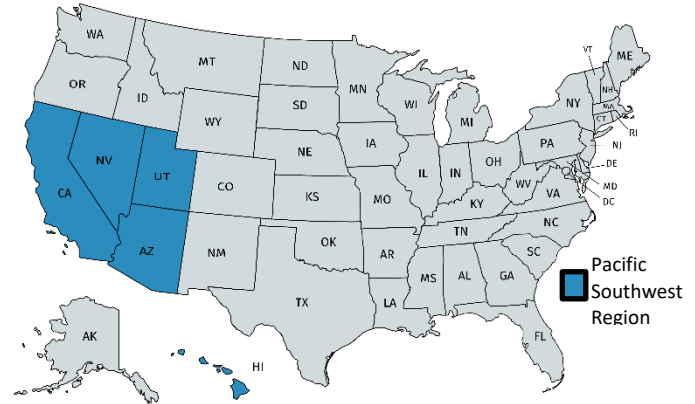


4.2 NATIONAL AND REGIONAL PROGRAMMING TRENDS

4.2.1 PROGRAMS OFFERED BY PARK AND RECREATION AGENCIES (PACIFIC SOUTHWEST REGION)

NRPA's *Agency Performance Review 2019* summarize key findings from NRPA Park Metrics, which is a benchmark tool that compares the management and planning of operating resources and capital facilities of park and recreation agencies. The report contains data from 1,069 park and recreation agencies across the U.S. as reported between 2015 and 2019.

The report shows that the typical agencies (i.e., those at the median values) offer 161 programs annually, with roughly 60% of those programs being fee-based activities/events.



According to the information reported to the NRPA, the top five programming activities most frequently offered by park and recreation agencies, both in the U.S. and regionally, are described in the table below.

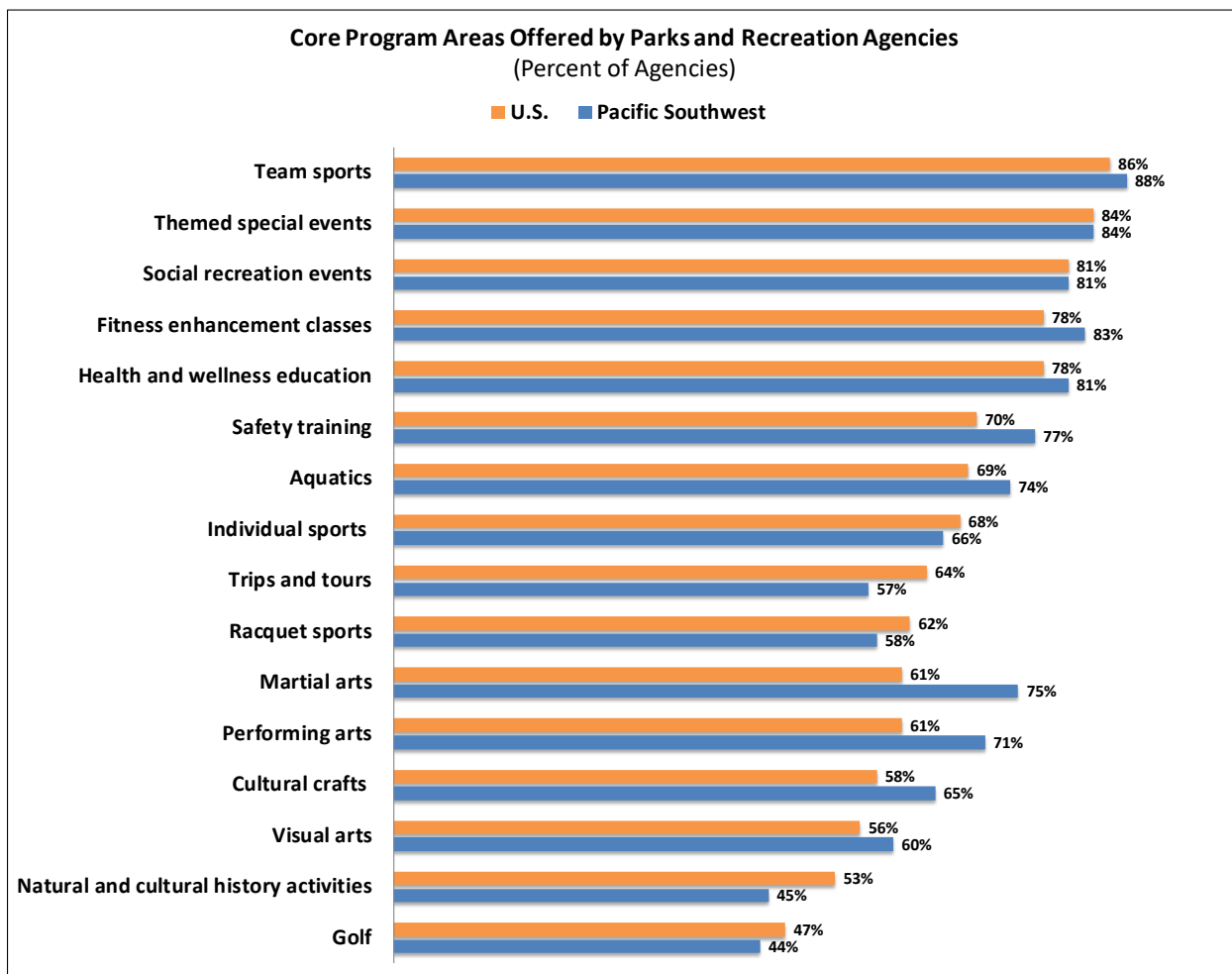
When comparing Pacific Southwest agencies to the U.S. average, team sports, themed special events, social recreation events, fitness enhancement classes, and health and wellness education were all identified as the top five most provided program areas offered regionally and nationally.

Top 5 Most Offered Core Program Areas (Offered by Parks and Recreation Agencies)	
U.S. (% of agencies offering)	Pacific Southwest Region (% of agencies offering)
• Team sports (86%)	• Team sports (88%)
• Themed special events (84%)	• Themed special events (84%)
• Social recreation events (81%)	• Fitness enhancement classes (83%)
• Fitness enhancement classes (78%)	• Social recreation events (81%)
• Health and wellness education (78%)	• Health and wellness education (81%)



Town of Oro Valley Parks and Recreation

In general, Pacific Southwest park and recreation agencies offered programs at a slightly higher rate than the national average. Based on a discrepancy threshold of 5% or more, Pacific Southwest agencies are offering fitness enhancement classes, safety training, aquatics, martial arts, performing arts, and cultural crafts at a higher rate than the national average. Contradictory, the Pacific Southwest Region is trailing the national average in regards to trips and tours and natural and cultural history activities. A complete comparison of regional and national programs offered by agencies can be found below.



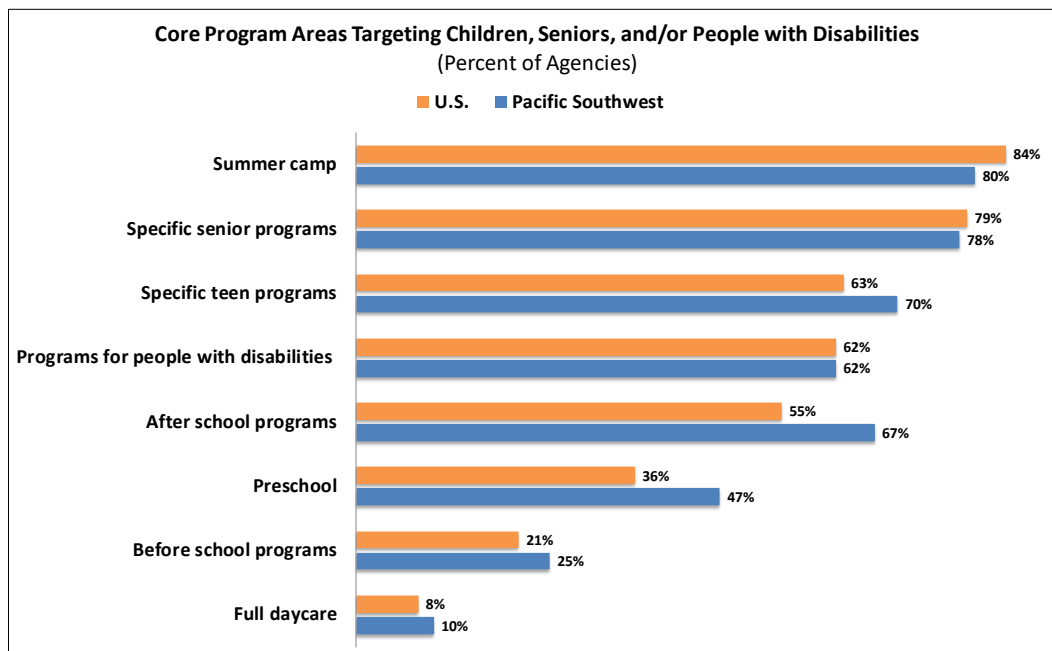
4.2.2 TARGETED PROGRAMS FOR CHILDREN, SENIORS, AND PEOPLE WITH DISABILITIES

For better understanding of targeted programs by age segment, the NRPA also tracks program offerings that cater specifically to children, seniors, and people with disabilities, on a national and regional basis. This allows for further analysis of these commonly targeted populations. According to the 2019 NRPA Agency Performance Review, approximately 79% of agencies offer dedicated senior programming, while 62% of park and recreation agencies provide adaptive programming for individuals with disabilities.

Based on information reported to the NRPA, the top three activities that target children, seniors, and/or people with disabilities most frequently offered by park and recreation agencies are described in the table below.

Top 3 Most Offered Core Program Areas (Targeting Children, Seniors, and/or People with Disabilities)	
U.S. (% of agencies offering)	Pacific Southwest Region (% of agencies offering)
• Summer camp (84%)	• Summer camp (80%)
• Senior programs (79%)	• Senior programs (78%)
• Teen programs (63%)	• Teen programs (70%)

Agencies in the Pacific Southwest tend to offer targeted programs at a significantly higher rate than the national average. This is especially evident when looking at specific teen programs, after school programs, and preschool school programs. A complete comparison of regional and national programs offered by agencies can be found below.





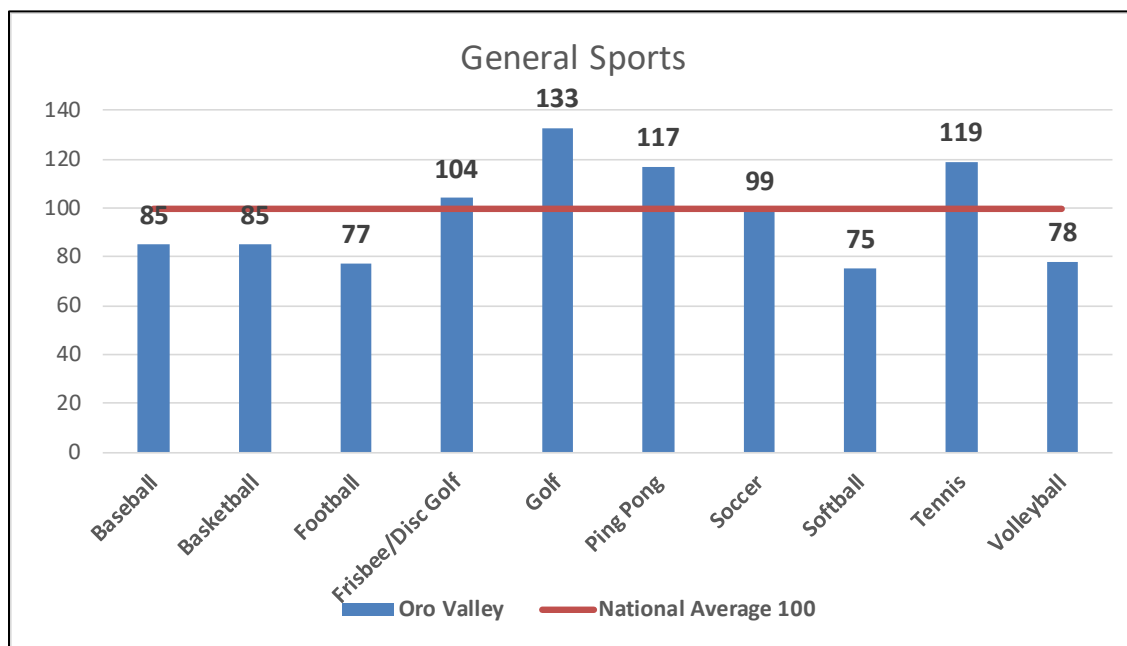
4.3 LOCAL SPORT AND MARKET POTENTIAL

The following charts show sport and leisure market potential data from ESRI. A Market Potential Index (MPI) measures the probable demand for a product or service within the Town and its surrounding Town of Oro Valley. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the US National average. The national average is 100, therefore numbers below 100 would represent a lower than average participation rate, and numbers above 100 would represent higher than average participation rate. The Town is compared to the national average in three (3) categories - general sports, fitness and outdoor recreation.

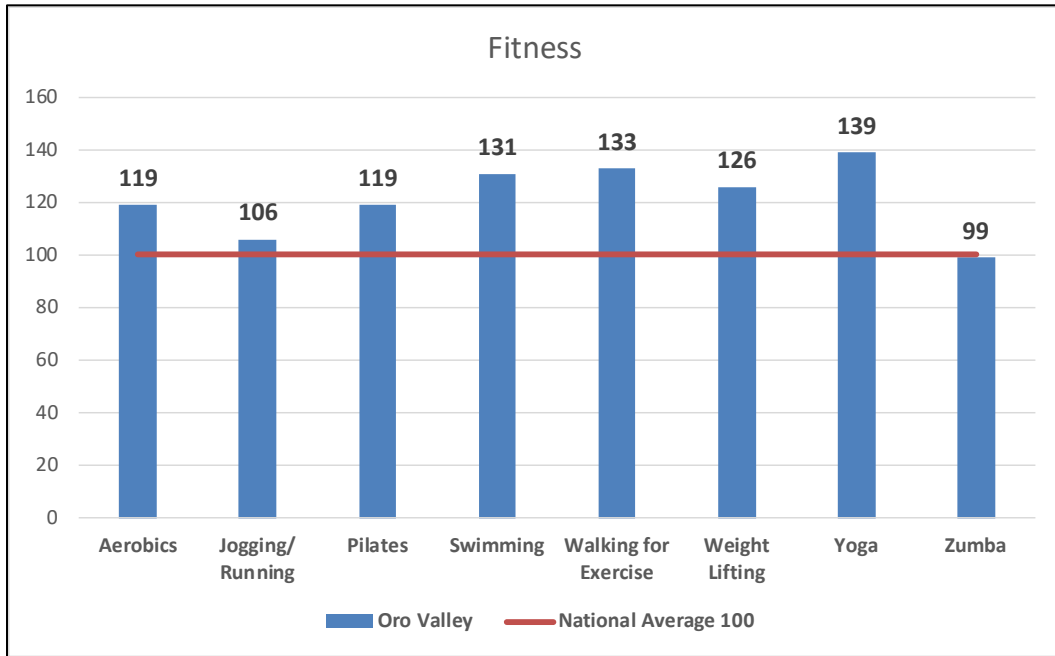
Overall, Oro Valley demonstrates above average market potential index (MPI) numbers. Looking at the three categories (general sports, fitness, and outdoor recreation), even though they each have a few activities with MPI scores above the national averages, a majority of the activities' MPI scores are above 100. These overall MPI scores show that Oro Valley has average to below average participation rates when it comes to programs, services and activities. This becomes significant for when the Town considers building new facilities/parks or starting up new programs; giving them a strong tool to estimate resident attendance. In an aging community, it is expected that the lowest MPI numbers would be in the general sports category, as most team sports are participated in by people under the age of 40.

High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents of the Town will actively participate in offerings provided by the Town. General Sports MPI.

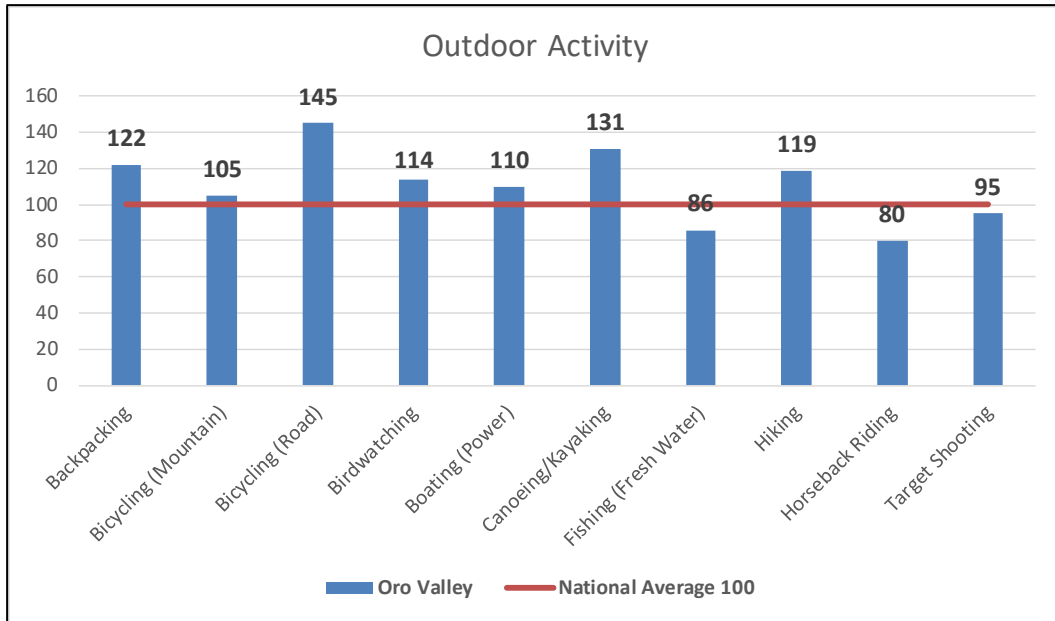
4.3.1 GENERAL SPORTS MPI



4.3.2 GENERAL FITNESS MPI



4.3.3 OUTDOOR ACTIVITY MPI





4.4 SUMMARY

It is critically important for the Oro Valley Parks and Recreation Department to understand the local and national participation trends in recreation activities. In doing so, the Department can gain general insight into the lifecycle stage of recreation programs and activities (emerging, stable and declining) and thereby anticipate potential changes in need and demand for the programs and activities that it provides to the residents of Oro Valley. Here are some major takeaways for local and national recreation trends:

- Basketball remained the most popular sport nationally while golf is the most popular sport locally.
- Nationally, pickleball has emerged as the overall fastest growing sport offered at by local park and recreation agencies and it has made its presence felt in Oro Valley.
- Tackle football and touch football are losing participants nationally and locally.
- All listed aquatic activities have experienced strong participation growth over the last five years, both locally and nationally though competition swimming has seen a decrease in the last year.
- Fitness walking remained the most popular fitness activity nationally and locally and will likely grow in popularity in Oro Valley as the trail system expands over the next 10 years.
- Outdoor recreational activities are on the rise nationally. Hiking is extremely popular both nationally and locally.
- Based on national measurements, income level has a negative impact on inactivity rate. Lower income households tend to have higher inactivity rate.
- Age is also a significant factor to inactivity level. Generation Z (age 6-17) had the lowest inactivity rate while the boomers (age 55+) had the highest inactivity rate.
- Besides income and age factors, non-participants are more likely to join sports or fitness activities if a friend accompanies them.
- Ownership of health and fitness tracking devices has increased in recent years.

CHAPTER FIVE - COMMUNITY NEEDS ASSESSMENT

The efforts in creating the Phase One of the Master Plan were based on an evaluation of existing resources and capacity as well as community input. Thus, a key consideration to creating a vision for parks and recreation in Town of Oro Valley is to understand current community values, needs, and desires. The assessment of these values is accomplished by triangulating information generated from focus groups with staff, public input received via the project website, a statistically valid survey, and reinforced through intercept and electronic surveys. The surveys were written to reflect issues and wishes that emerged from the qualitative data gathered through discussions with staff. Triangulation occurs when findings of the qualitative work is supported by the quantitative work. The following sections discuss this process and resulting findings.

5.1 QUALITATIVE INPUT SUMMARY

In January of 2020, the consultant team conducted a series of town hall, stakeholder and focus group meetings in partnership with Town staff that included representatives from various stakeholder groups, including the school districts, athletic organizations, youth leadership boards, and the development community. The results of these focus group discussions, as well as the input received via the project website, were condensed to a series of key themes that emerged.

Input from the community confirmed that Oro Valley's parks are loved by many, but there are gaps in service and amenities and additional Town investment is needed to maintain and develop new parks for the growing community. Participants see the system as one that is well-maintained with great staff. They also enjoy the numerous programs and amenities offered. Unmet needs exist as the demand for select services is currently outweighing the available facilities and/or existing amenities. The following summarizes the themes of community input:

ECONOMIC DEVELOPMENT THROUGH PARK DEVELOPMENT

Opportunity exists for park development to enhance and/or advance economic development. There is also an opportunity for economic development to enhance and support park development.

- Parks and recreation can play a significant role in business attraction, residential development, and the overall quality of life attributes desired by the community.
- Investment in parks reflects the community's value set and the Town's overall attitude of being an active player in the betterment of the community.
- The completion of Naranja Park and the reinvestment in Steam Pump Ranch can potentially serve as economic catalysts.
- Generalized opportunities to enhance the economic impact via tourism were cited through a number of existing Town offerings, including, but not limited to golf, pickleball, tennis, athletic field sports, competitive swimming and festivals/events.

INVESTING IN THE EXISTING PARKS SYSTEM

- Continue to focus on reinvesting in and maintaining existing parks.
- Opportunities exist to, in part, help meet the recreational needs of the community, in partnership with the development community, the Amphitheater Unified School District.



OPEN SPACE

- Desire to preserve defunct the Rancho Vistoso golf course, at least in part, as an open space conservation area was consistently expressed through all community input opportunities.

TRAILS AND CONNECTIVITY

- Desire for a connected, accessible recreational trail system that also supports active transportation and safe routes to school.

ADVOCACY AND AWARENESS

- Increased and targeted Communication/Marketing is needed to develop more advocacy for, and the awareness of, the parks and recreation system.

FUNDING THE PARKS AND RECREATION SYSTEM

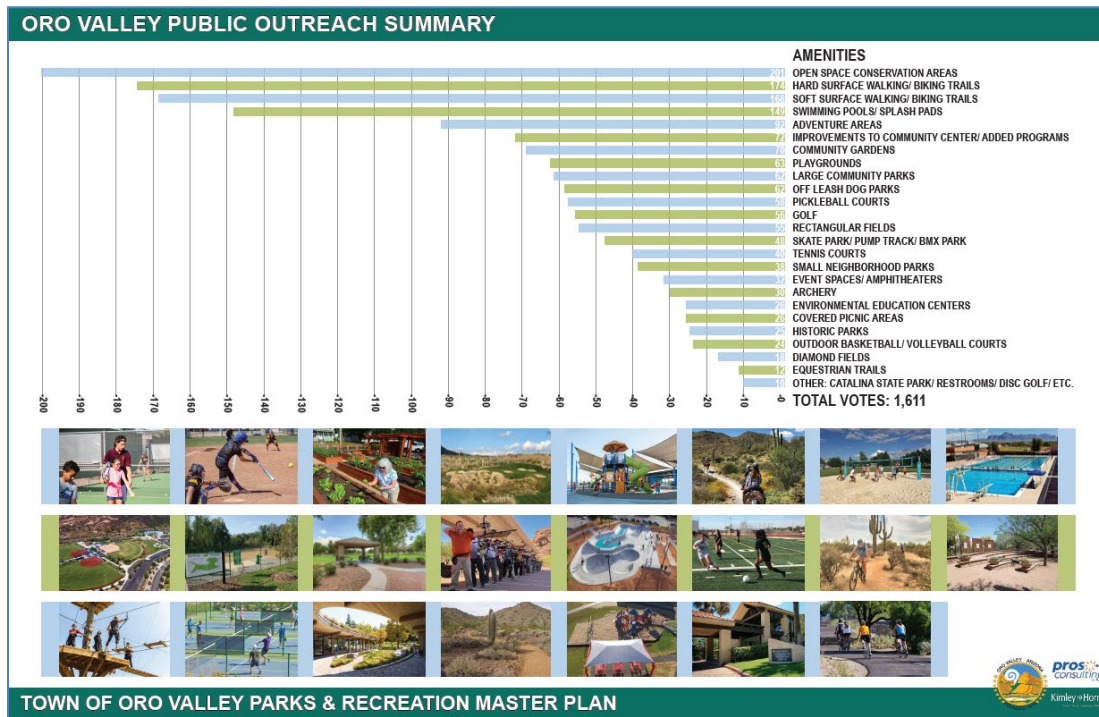
- Multiple fiscally sustainable funding strategies, without increasing taxes, may be required to meet the needs of the community over the next 10 years.
- Continue to secure funding through grant programs will be critical for funding park development over the next 10 years.

5.2 INTECEPT SURVEY FINDINGS

In February and March of 2020, the consultant team and the Town of Oro Valley's Parks and Recreation Advisory Board conducted a series of intercept surveys to gather input from residents regarding the importance of park and recreation facilities and amenities. The intercept surveys were conducted utilizing a display board-dot exercise methodology on the following dates and events:

- Friday, February 7th at First Friday
- Saturday, February 8th at Farmers Market
- Wednesday, March 4th at Riverfront Park (evening)
- Sunday, March 8th at Safeway (mid-day)
- Monday, March 9th at Naranja Park (evening)
- Wednesday, March 11th at Naranja Park (evening)
- Thursday, March 12th at Aquatic Center (mid-day)
- Sunday, March 15th at Safeway (mid-day)
- Monday, March 16th at Community Center (morning)

The graphic on the following page summarizes the findings of the intercept surveys



5.3 PROJECT WEBSITE INPUT

As part of the community input process, the consultant team, in conjunction with the Parks and Recreation Department, developed and administered a project website, www.planyourparksov.com. The website provided residents with an open participation portal to provide feedback on their park and recreation needs. The below provides a summary of the 926 responses received via the project website from January-May 2020.

Area of Interest	Volume of Comments
Preserving Golf Course in Vistoso as Open Space	High
Reinvesting in Community Center	
Reinvesting in Golf Courses	
Take Care of What We Already Have	
Community Connectivity through Trails	
Expansion of Trails in Parks (Naranja Park)	
Expansion of Pickleball Courts	Medium
Expansion of Athletic Fields	
Aquatic Center Expansion and Fees	
Community Special Events are desired	
Dog Parks are Important	
Conservation at SteamPump Ranch	
Completing Naranja Park	Low
Expansion of Tennis Courts	
Skateparks and BMX Parks	
Increased Programs and Services for Children	
Disc Golf Courses	



5.4 ON-LINE SURVEY

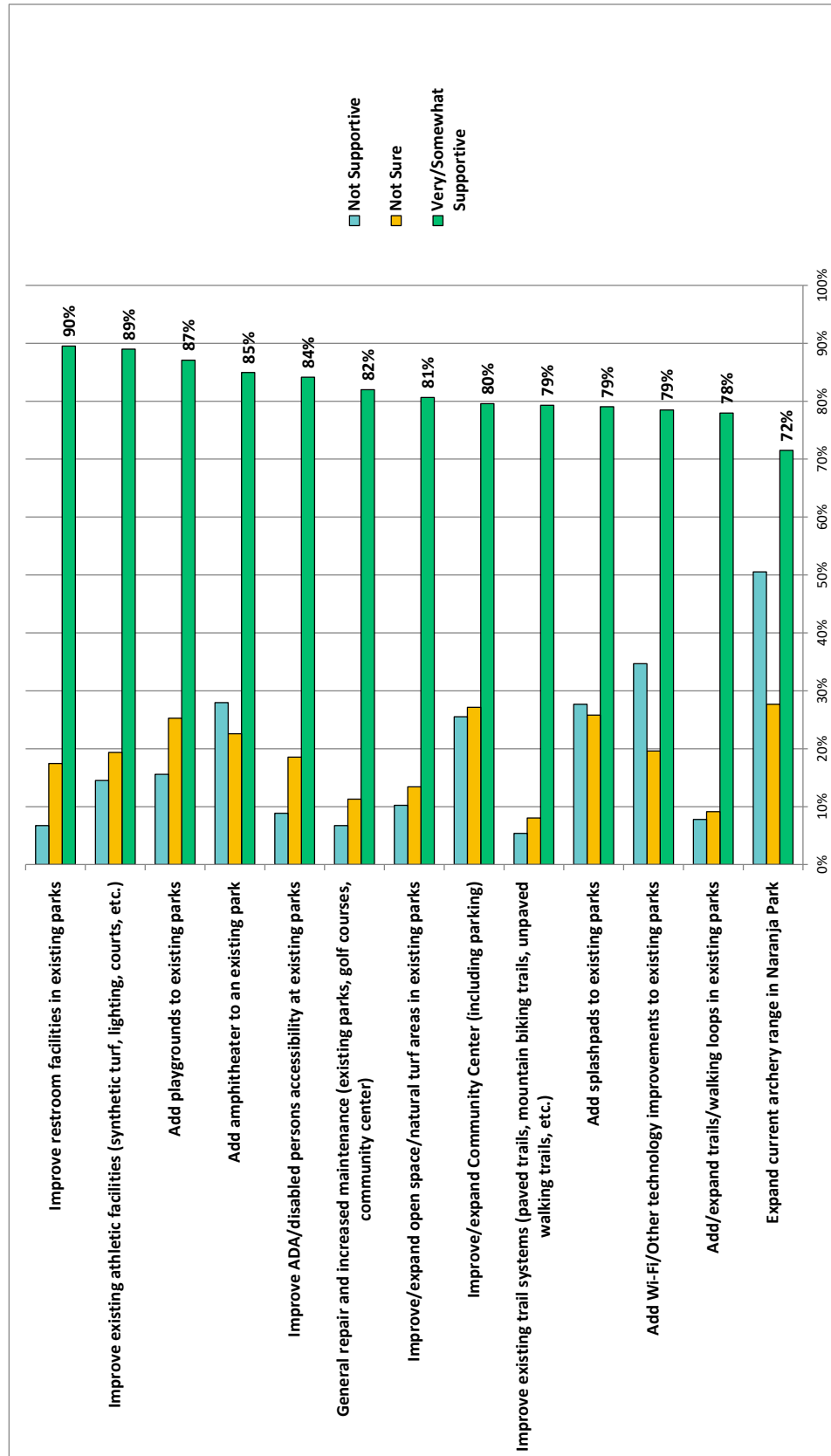
As part of the community input process, the consultant team, in conjunction with the Parks and Recreation Department, conducted an on-line, Survey Monkey survey from April 20 - May 3, 2020. This survey was completed as an additional way to provide residents an opportunity of their parks and recreation preferences. A summary of the results of the 372 completed surveys are as follows:

5.4.1 PROGRAM/SERVICE AND FACILITY IMPORTANCE

Recreation Program/Service	Priority
Community special events (concerts, festivals, etc.)	High
Fitness and wellness programs (Yoga/Tai Chi classes, etc.)	
Walking/jogging/running/cycling clubs	
Senior programs and services	
Environmental education programs	Medium
Reservation/rental of picnic shelters	
Performing arts programs	
Art classes (pottery, painting, music, etc.)	
Reservation/rental of indoor meeting space	Low
Water fitness programs/lap swimming	
Open Swim	
Weightlifting/bodybuilding programs	
Bicycle lessons and clubs	
Golf lessons/clinics	
Adult learning classes (language, tech, etc.)	
Tennis lessons and leagues	
Learn to swim programs	
Sand volleyball programs	
Basketball Programs	
Pickleball lessons/clinics	
Disc golf course	
Volleyball programs	
Running events (5K, 10K, Marathons)	
Soccer programs	
Programs for people with special needs	
Softball programs	
Baseball Programs	
Reservation/rental of athletic fields	
After school programs/out-of-school camps	
Family-oriented programs (Mommy & Me, Daddy & Me, etc.)	
Gymnastics	
Football programs	
Recreation/competitive swim team	
Lacrosse programs	
Archery	

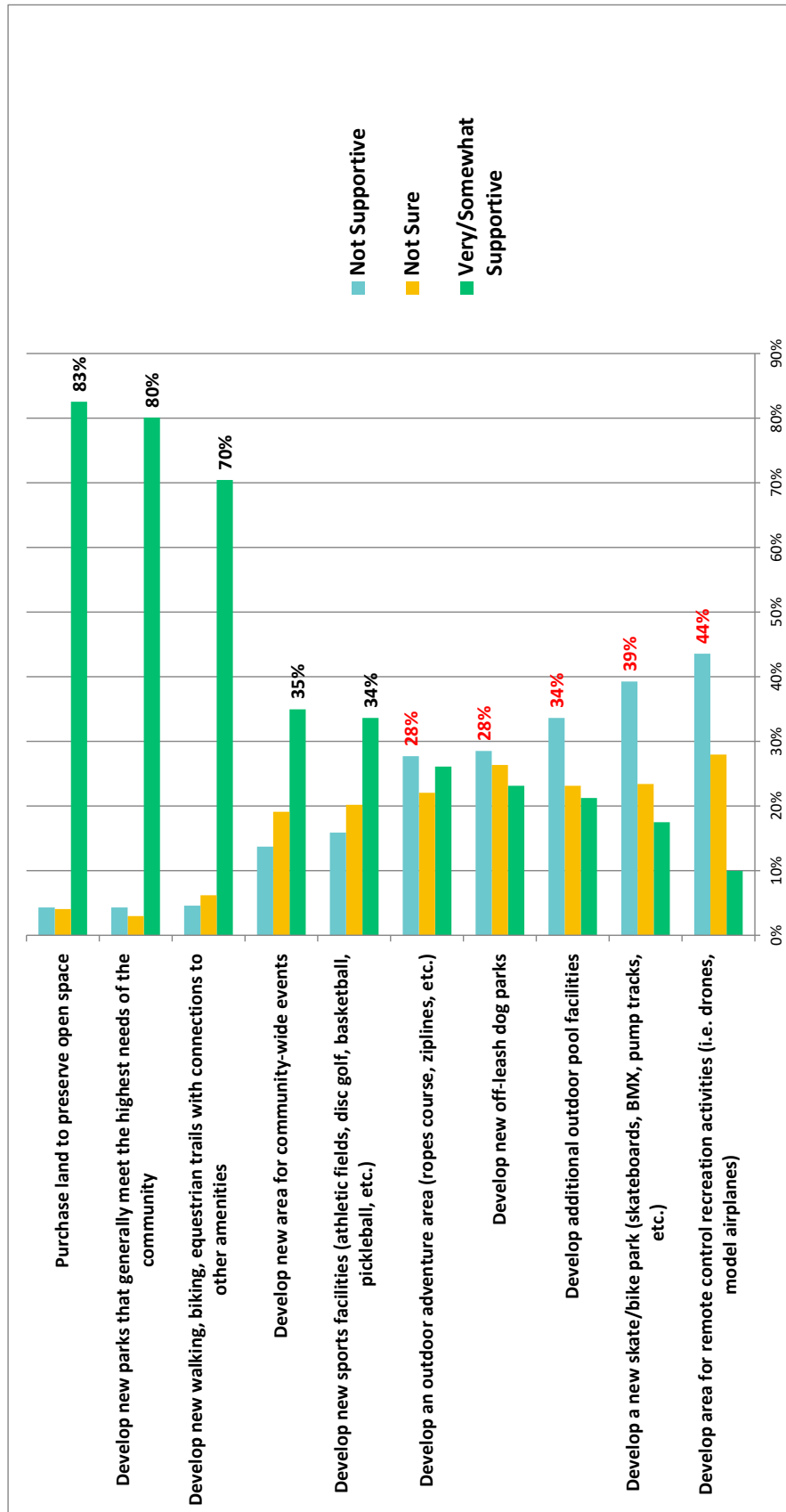
Facility/Amenity	Priority
Open space conservation areas/trails	High
Trails (natural surface)	
Trails (multi-use paved)	
Neighborhood parks	
Restroom buildings in parks	Medium
Large community parks	
Pavilions/picnic sites	
Community gardens	
Environmental education center	
Performing Arts Venue (stage)	
Recreation/Community Center	
Playgrounds	
Dog parks (off-leash)	
Amphitheater	
Skateboarding/Bicycle parks (concrete)	Low
Tennis courts	
Basketball/Volleyball courts – outside	
Basketball/Volleyball courts – inside	
Golf	
Pickleball courts	
Disc golf course	
Sand volleyball courts	
Football/Soccer/Lacrosse fields	
Aquatics Facility – recreation/lap pool	
Aquatics Facility – splash pad/water play features	
Baseball/Softball fields	
Banquet/meeting rooms	
Dirt bicycle pump/BMX track	
Remote Control (RC) Hobby facility	
Aerobics/dance rooms/dance floors	
Aquatics Facility – competition pool	
Archery range	

5.4.2 FUNDING SUPPORT TO IMPROVE EXISTING SYSTEM – WITHOUT INCREASING TAXES





5.4.3 FUNDING SUPPORT TO EXPAND SYSTEM – WITHOUT INCREASING TAXES



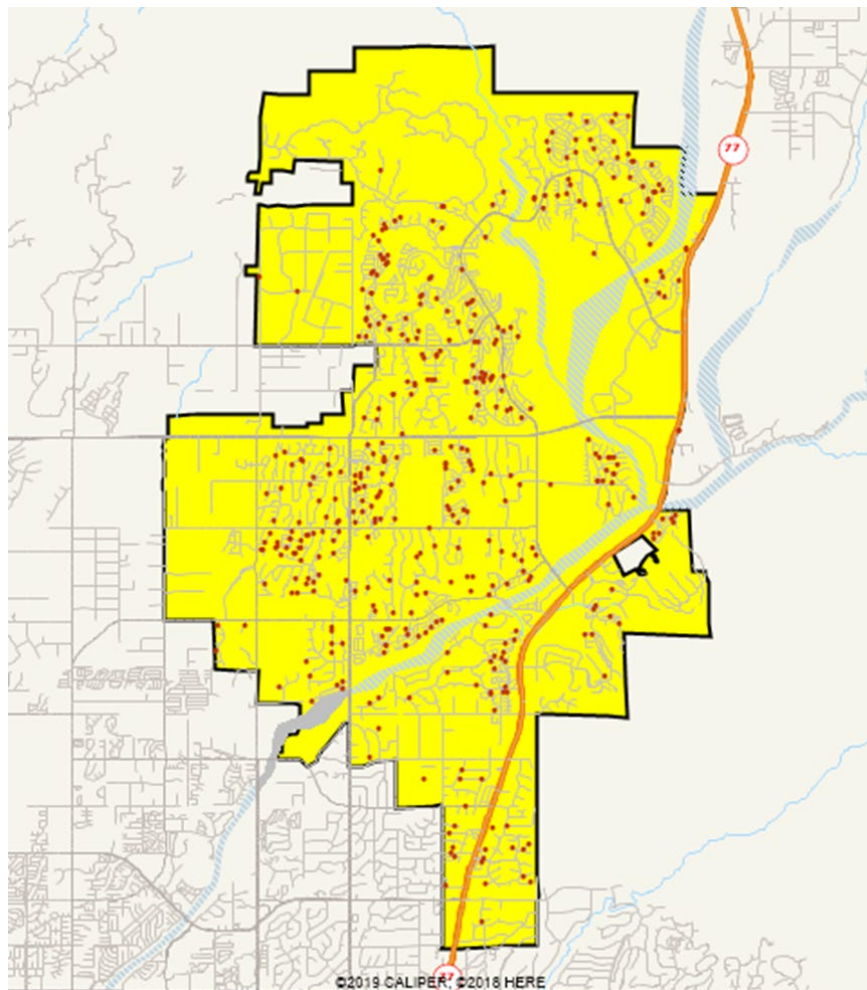
5.5 STATISTICALLY VALID SURVEY

5.5.1 OVERVIEW

ETC Institute administered a needs assessment survey for Town of Oro Valley February-April 2020. The survey was administered as part of the Town's Parks and Recreation Needs Assessment for their residents. The survey results will aid the Town in taking a resident-driven approach to making decisions that will enrich and positively affect the lives of residents.

5.5.2 METHODOLOGY

ETC Institute mailed a survey packet to a random sample of households in Town of Oro Valley. Each survey packet contained a cover letter, a copy of the survey, and a postage-paid return envelope. Residents who received the survey were given the option of returning the survey by mail or completing it on-line. The goal was to obtain completed surveys from at least 375 resident households. The goal was exceeded with a total of 443 resident households completing the survey. The overall results for the sample of households have a precision of at least $\pm 4.8\%$ at the 95% level of confidence. The following scatterplot graph indicates where completed surveys were received from residents in Town of Oro Valley.



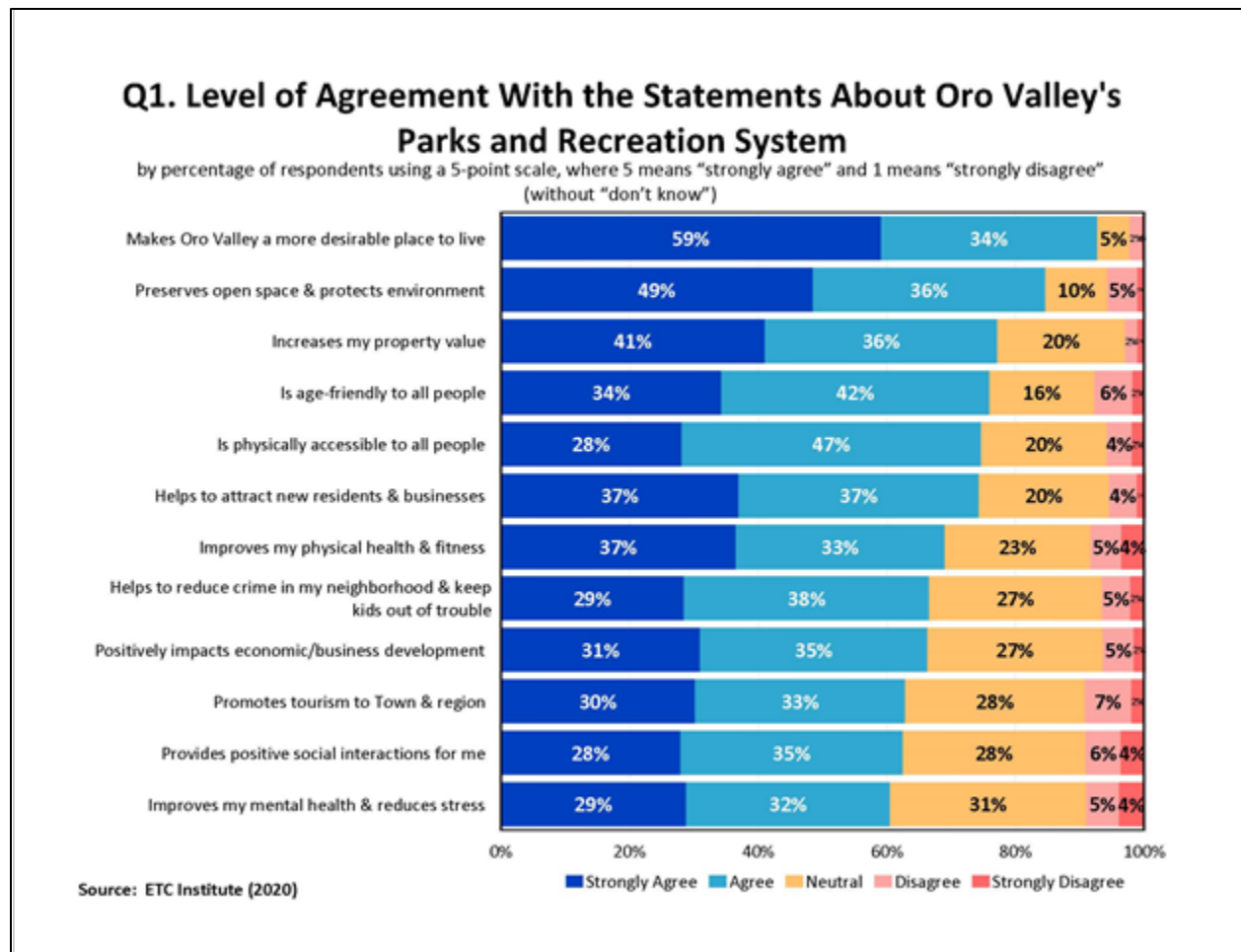
The major findings of the survey are summarized on the following pages. Complete survey results are provided as a separate document.



5.5.3 AGREEMENT WITH THE BENEFITS OF PARKS AND RECREATION

Respondents were asked to indicate their level of agreement with the benefits of Oro Valley's Recreation system.

- Ninety-three percent (93%) indicated that the system Makes Oro Valley a More Desirable Place to Live.
 - Other benefits most agreed with include:
 - Preserves Open Space and Protects the Environment (85%).
 - Increases My Property Value (77%).
 - Is Age-Friendly to All People (76%).
 - Is Physically Accessible to All People (75%).
 - Helps to Attract New Residents and Businesses (74%).
 - Improves My Physical Health and Fitness (70%).
 - Helps to Reduce Crime (67%).
 - Positively Impacts Economic/Business Development (66%).
 - Promotes Tourism to the Town (63%).

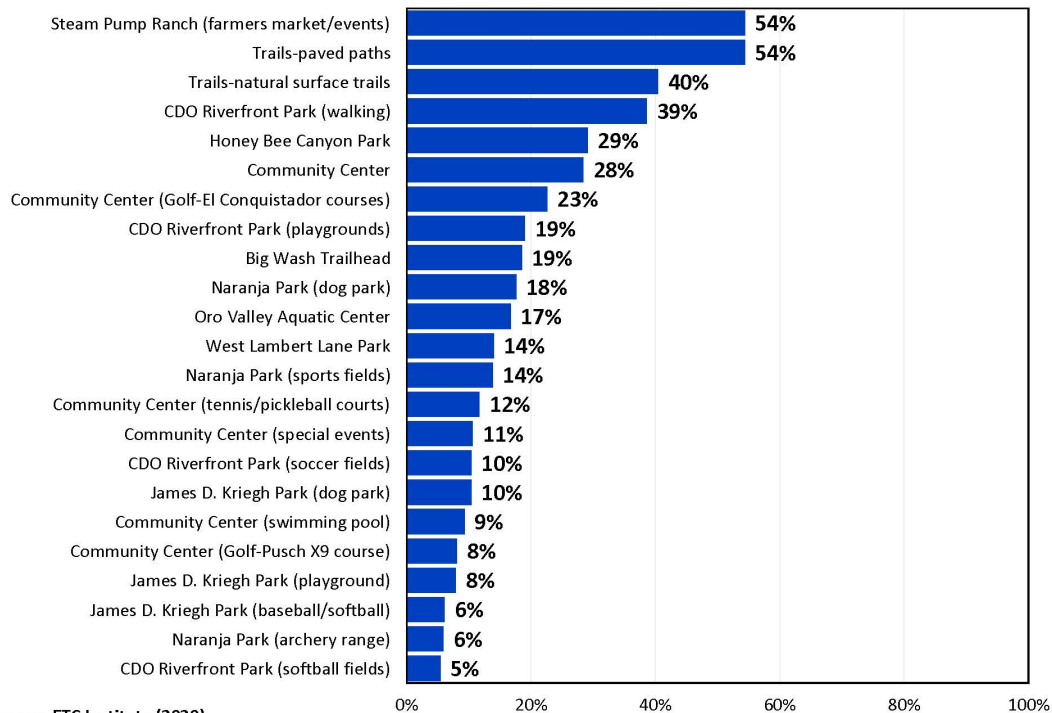


5.5.4 PARK AND FACILITY UTILIZATION AND CONDITION RATINGS

- **Utilization:**
- Fifty-four percent (54%) indicated they have utilized both Steam Pump Ranch and Paved Trails in the last six months.
 - Other most utilized parks and facilities in Oro Valley include:
 - Natural Surface Trails (40%).
 - CDO Riverfront Park (walking) (39%).
 - Honey Bee Canyon Park (29%).
 - Community Center (28%).
 - Community Center Golf Courses (23%).

Q4. Please indicate if you or any member of your household HAS USED each of the Parks and Recreation facilities listed below in the past 6 months.

by percentage of respondents (multiple responses could be selected)



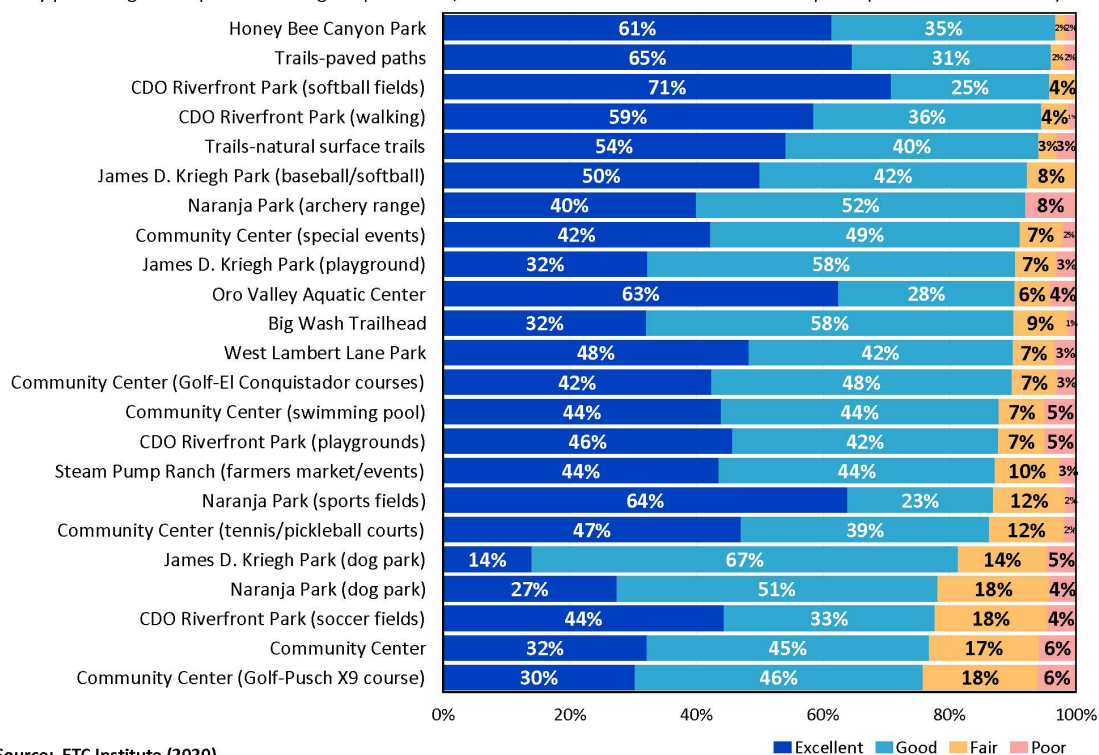
Source: ETC Institute (2020)



- **Condition Ratings of Parks and Facilities:**
 - Ninety-four percent (95%) of Oro Valley’s parks and recreation facilities were given a condition rating that exceeded the **national benchmark for excellent of 29%**. The only two locations that received below national benchmark ratings were:
 - James D. Kreigh Dog Park (14%).
 - Naranja Park Dog Park (27%).

Q4. Ratings of Town Facilities

by percentage of respondents using a 4-point scale, where 4 means “excellent” and 1 means “poor” (without “don’t know”)



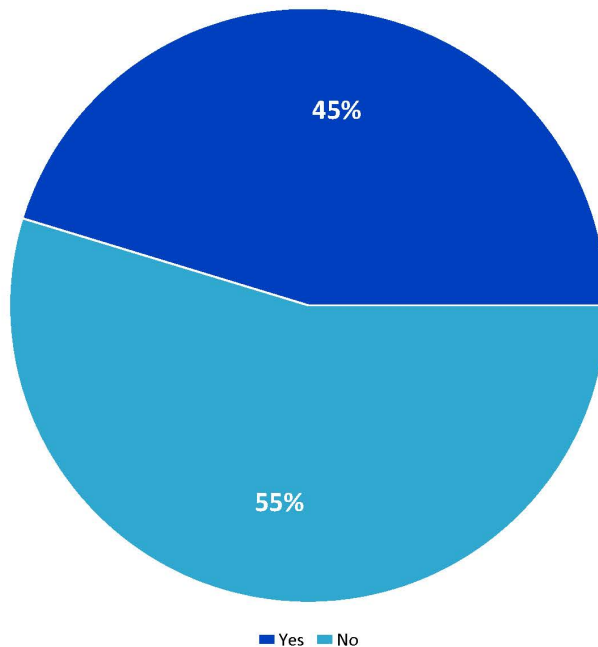
5.5.5 PROGRAM PARTICIPATION AND QUALITY RATINGS

- **Program Participation and Ratings:**
 - Forty-one percent (45%) of households participated in Oro Valley Parks and Recreation Department programs and services over the past 12 months.

The national benchmark for program participation is 33%.

Q2. Has your household participated in any recreation programs/services offered by the Town of Oro Valley during the past 12 months?

by percentage of respondents



Source: ETC Institute (2020)



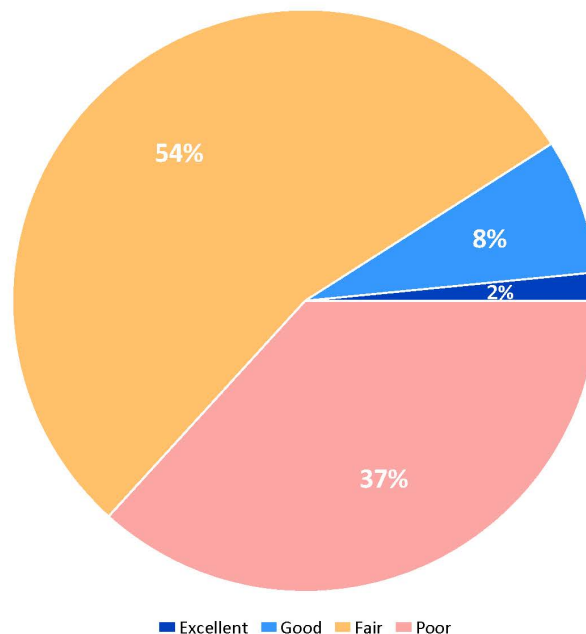
- **Program Quality:**

- Of households who participated in programs, only two percent (2%) rated the programs as “excellent”.

The national benchmark for excellent is 33%.

Q2a. How would you rate the overall quality of the Town of Oro Valley recreation programs/services in which your household has participated?

by percentage of respondents who used programs (without “not provided”)



Source: ETC Institute (2020)

5.5.6 WAYS HOUSEHOLDS CURRENTLY LEARN ABOUT PROGRAMS AND ACTIVITIES

- **Newspaper (51%) Was the Most Utilized Source of Information When Learning About Program and Activity Offerings.**
 - Forty-seven percent (47%) of households indicated they relied on Friends & Neighbors as an information source.
 - Other most used sources include:
 - Town Website (35%).
 - Local Magazines/Publications (34%).
 - Temporary Signs at Parks or Around Town (31%).
 - Emails/E-Blasts (31%).

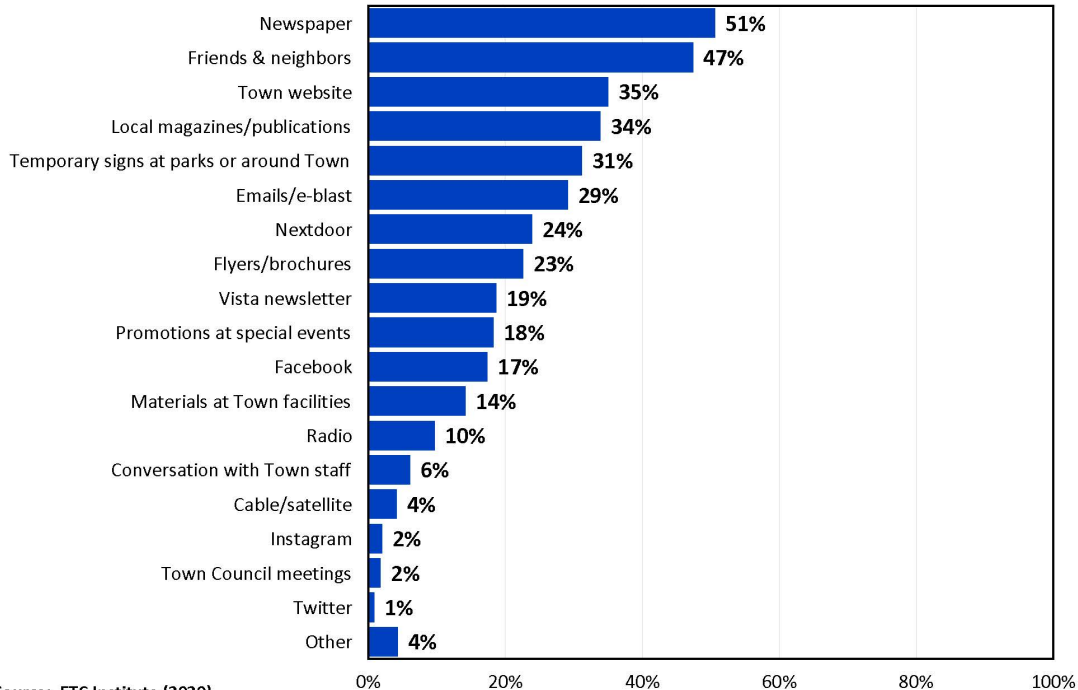
The national benchmark for newspaper is 31%.

The national benchmark for from friends and neighbors is 43%.

The national benchmark for website is 31%.

Q12. From the following list, please CHECK ALL of the following ways YOU CURRENTLY LEARN about recreation programs and activities.

by percentage of respondents (multiple choices could be made)



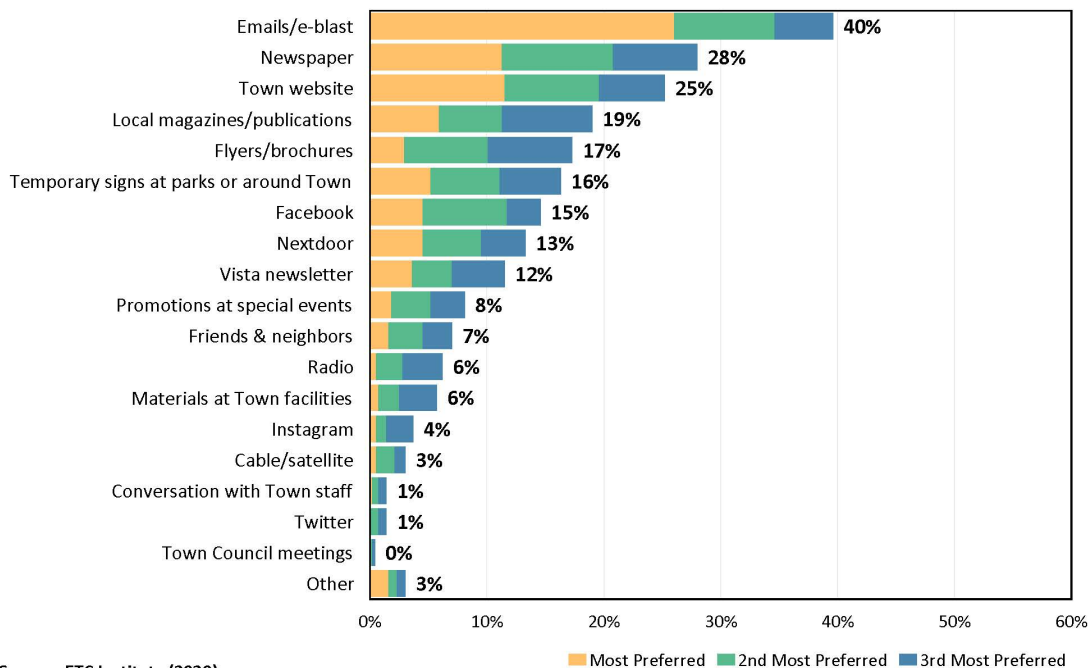


5.5.7 WAYS HOUSEHOLDS WOULD PREFER TO LEARN ABOUT PROGRAMS AND ACTIVITIES

- **Emails/E-Blasts (40%) Was the Most Preferred Source of Information When Learning About Program and Activity Offerings.**
 - Twenty-eight percent (28%) of households indicated they would prefer to continue to receive parks and recreation information source via the newspaper.
 - Other most preferred sources include:
 - Town Website (25%).
 - Local Magazines/Publications (19%).
 - Flyers and Brochures (17%).

Q13. From the list in Question 12, which THREE methods of communication would you MOST PREFER the Town to use to communicate with you about recreation programs, activities, and/or events?

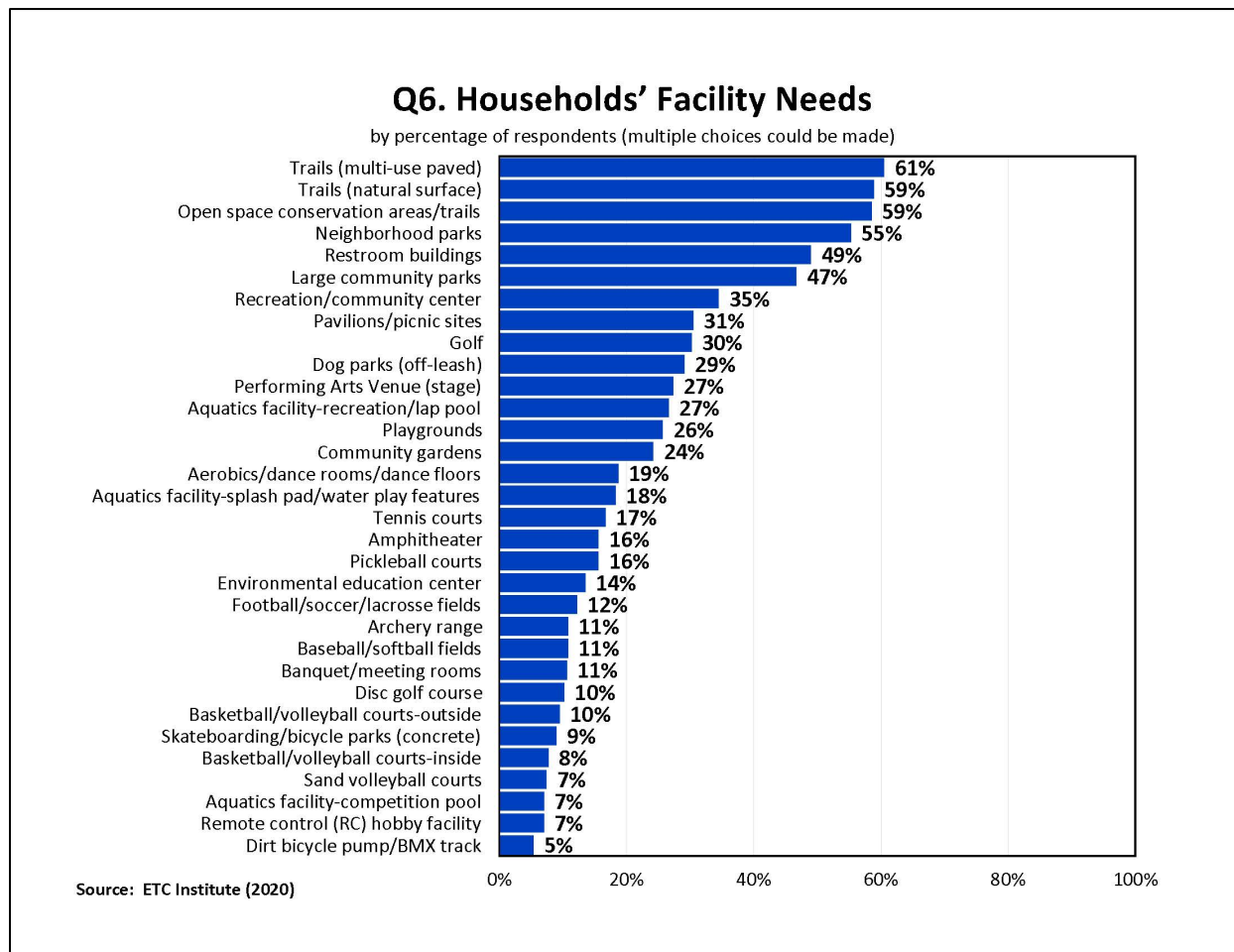
by percentage of respondents who selected the items as one of their top three choices



5.5.8 FACILITY NEEDS, UNMET NEEDS AND IMPORTANCE

Respondents were asked to indicate from a list of facilities/amenities whether or not they had a need. If the respondent indicated a need for the facility, they were then asked to rate how well their needs were being met.

- **Facility Needs:**
 - Sixty-one percent (61%) indicated a need for Multi-Use Paved Trails.
 - Other most needed facilities include:
 - Natural Surface Trails (59%).
 - Open Space Conservation Areas/Trails (59%).
 - Neighborhood Parks (55%).
 - Restroom Buildings (49%).
 - Large Community Parks (47%).
 - Recreation/Community Center (35%).
 - Pavilions/Picnic Sites (31%).
 - Golf (30%).





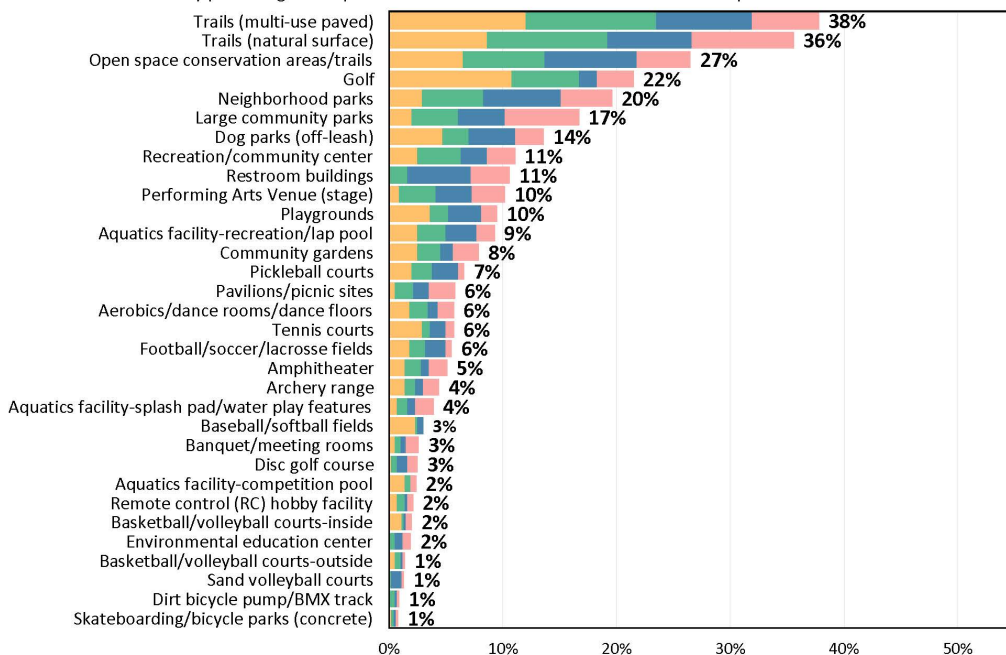
- **Facility Importance:**
 - Based on the sum of respondents' top four choices, 38% indicated Multi-Use Paved Trails were the most important to their household.
 - Other most important facilities include:
 - Natural Surface Trails (36%).
 - Open Space Conservation Areas and Trails (27%).
 - Golf (22%).
 - Neighborhood Parks (20%).

National benchmark for Multi-Use Paved Trails is 45%.

National benchmark for Golf is 9%.

Q7. Facilities Most Important to Households

by percentage of respondents who selected the items as one of their top four choices



Source: ETC Institute (2020)

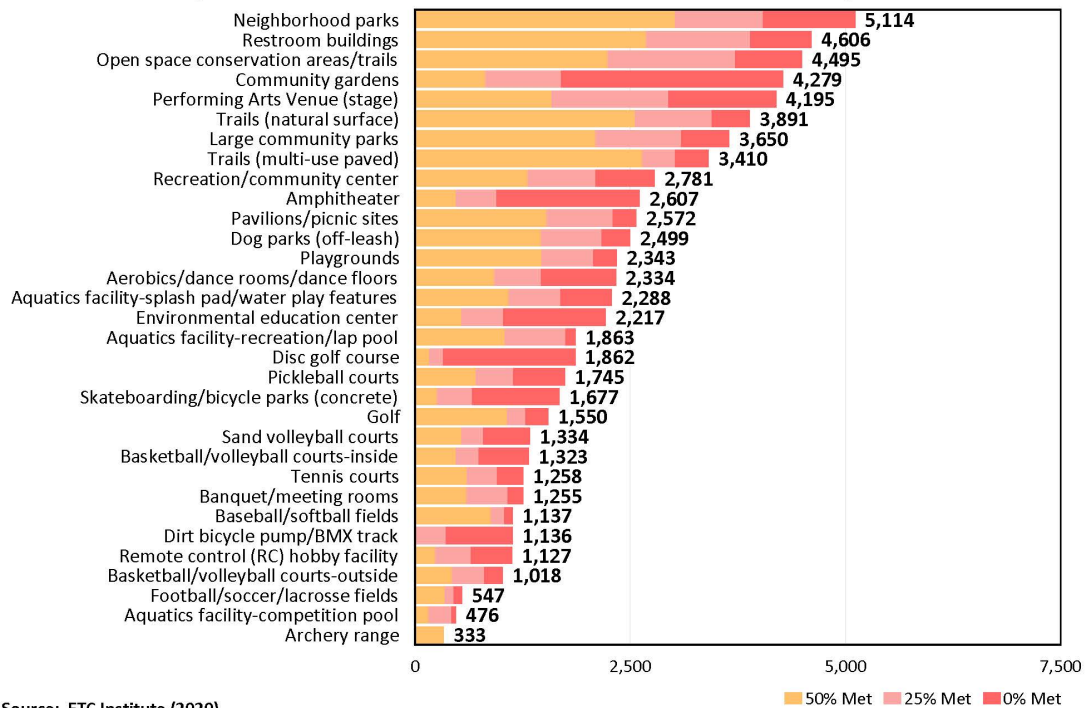
Most Important 2nd Most Important 3rd Most Important 4th Most Important

• **How Well Household Needs Are Being Met for Facilities:**

- Based on the number of households who indicated their needs were only being met 50% or less, 5,114 households (23%) indicated an unmet need for Neighborhood Parks.
- Other unmet needs include:
 - Restroom Buildings - 4,606 households (21%).
 - Open Space Conservation Areas and Trails - 4,495 households (20%).
 - Community Gardens - 4,279 households (19%).
 - Performing Arts Venue (Stage) - 4,195 households (19%).
 - Natural Surface Trails - 3,891 households (18%).
 - Large Community Parks - 3,650 households (17%).
 - Multi-Use Paved Trails - 3,410 households (15%).

**Estimated Number of Households Whose Needs for Facilities
Are Being Met 50% or Less**

by number of households based on an estimated 22,018 households in Oro Valley, Arizona





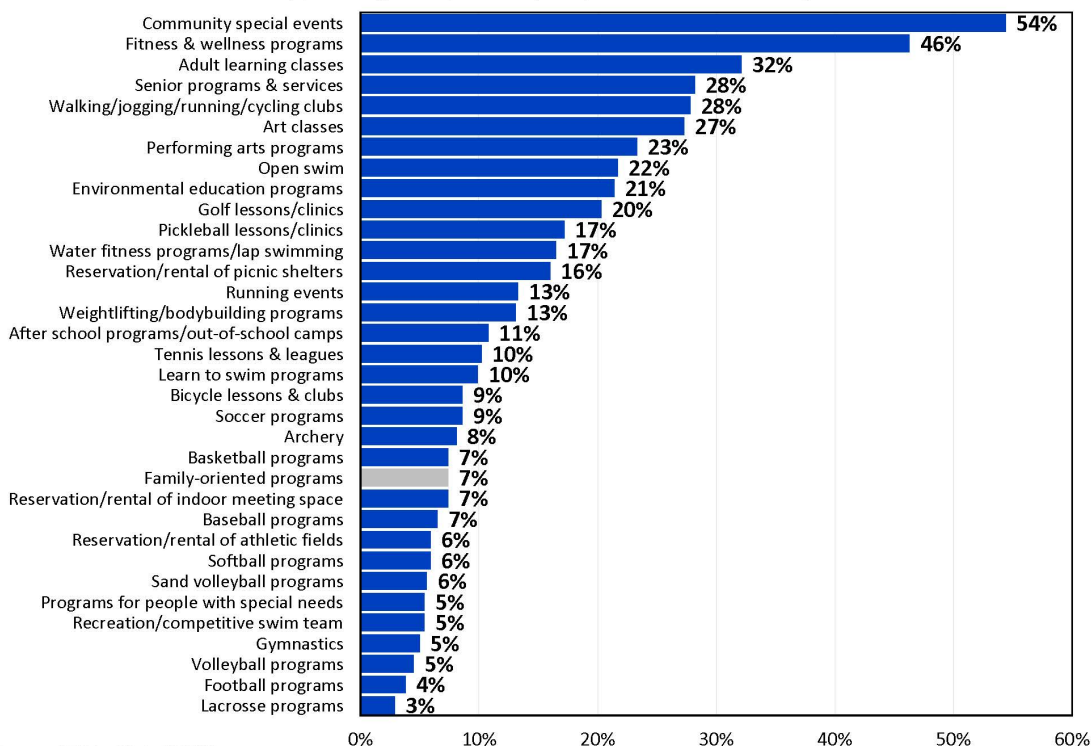
5.5.9 PROGRAM NEEDS, UNMET NEEDS AND IMPORTANCE

- **Recreation Program Needs:**

- Fifty-four percent (54%) of households indicated a need for Community Special Events.
- Other most needed programs include:
 - Fitness and Wellness Programs (46% of households).
 - Adult Learning Classes (32% of households).
 - Senior Programs and Services (28% of households).
 - Walking/Jogging/Running/Cycling Clubs (28% of households).
 - Art Classes (27% of households).

Q8. Households' Program Needs

by percentage of respondents (multiple choices could be made)

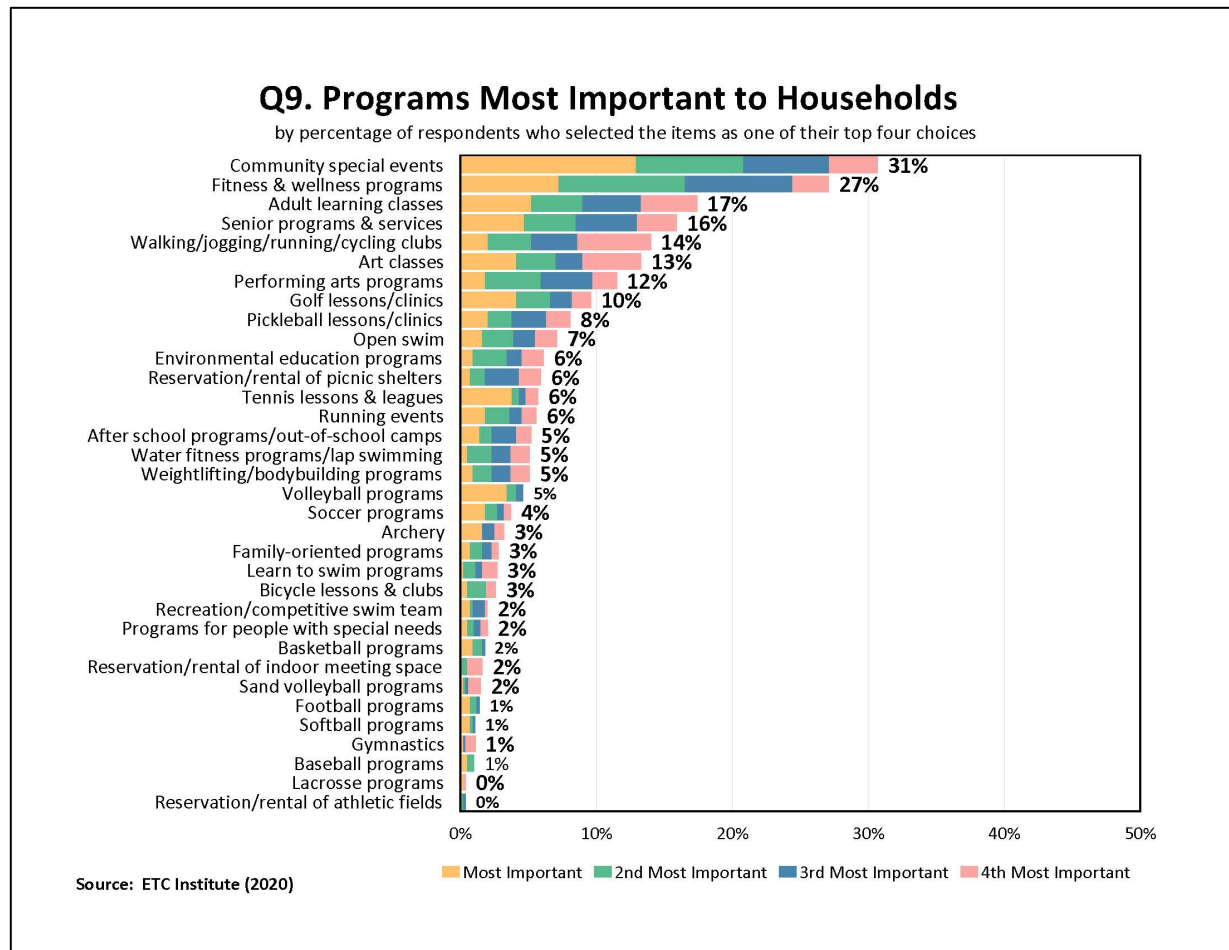


Source: ETC Institute (2020)

- **Recreation Program Importance:**

- Based on the percentage of households who indicated the program as one of their top four choices, 31% indicated Community Special Events were the most important to their household.
- Other most important recreation programs include:
 - Fitness and Wellness Programs (27% of households).
 - Adult Learning Classes (17% of households).
 - Senior Programs and Services (16% of households).
 - Walking/Jogging/Running/Cycling Clubs (14% of households).
 - Art Classes (13% of households).

National benchmark for Community Special Events is 21%.



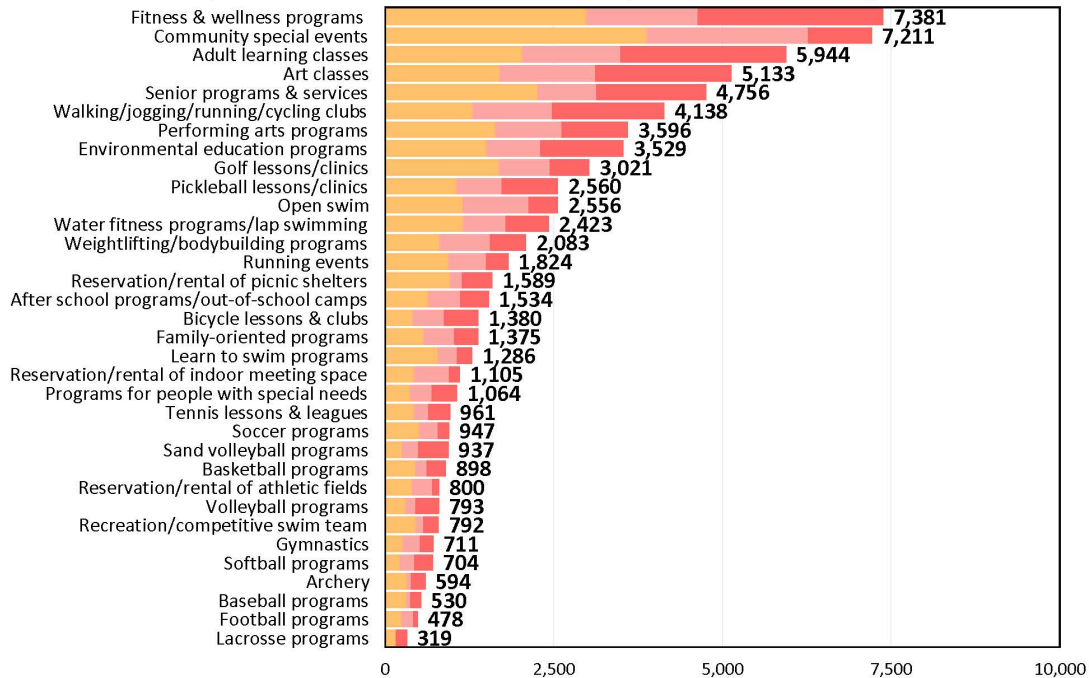


• How Well Needs Are Being Met for Programs:

- Based on the number of households who indicated their needs were only being met 50% or less, 7,381 households (34%) responded that Fitness and Wellness Programs had the greatest level of unmet need.
- Other unmet needs include:
 - Community Special Events - 7,211 households (33%).
 - Adult Learning Classes - 5,944 households (27%).
 - Art Classes - 5,133 households (23%).
 - Senior Programs and Services - 4,756 households (22%).
 - Walking/Jogging/Running/Cycling Clubs - 4,138 households (19%).

Estimated Number of Households Whose Needs for Programs Are Met 50% or Less

by number of households based on an estimated 22,018 households in Oro Valley, Arizona



Source: ETC Institute (2020)

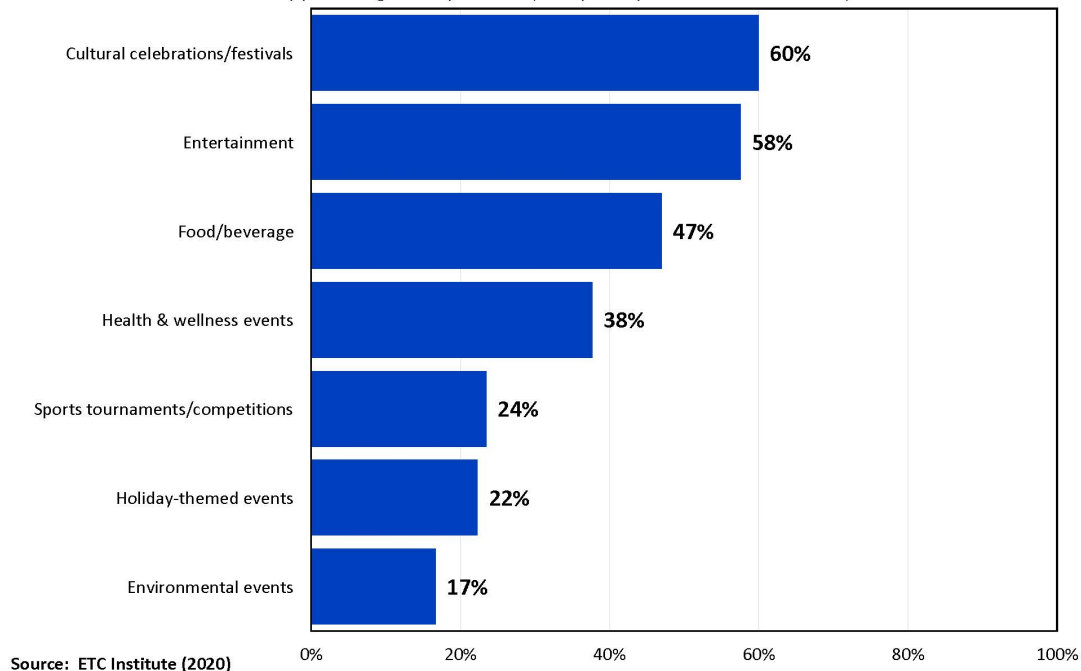
50% Met 25% Met 0% Met

5.5.10 SPECIAL EVENT CONCEPTS MOST INTERESTED IN

- Based on the percentage of households who indicated a concept as one of their top three choices, 60% indicated Cultural Celebrations/Festivals was the concept most interesting to their household.
 - Other special event concepts most interested in include:
 - Entertainment (58% of households).
 - Food/Beverage (47% of households).
 - Health and Wellness Events (38% of households).

Q3. From the following list, please check the THREE SPECIAL EVENT concepts that you and the members of your household WOULD BE MOST INTERESTED in.

by percentage of respondents (multiple responses could be selected)





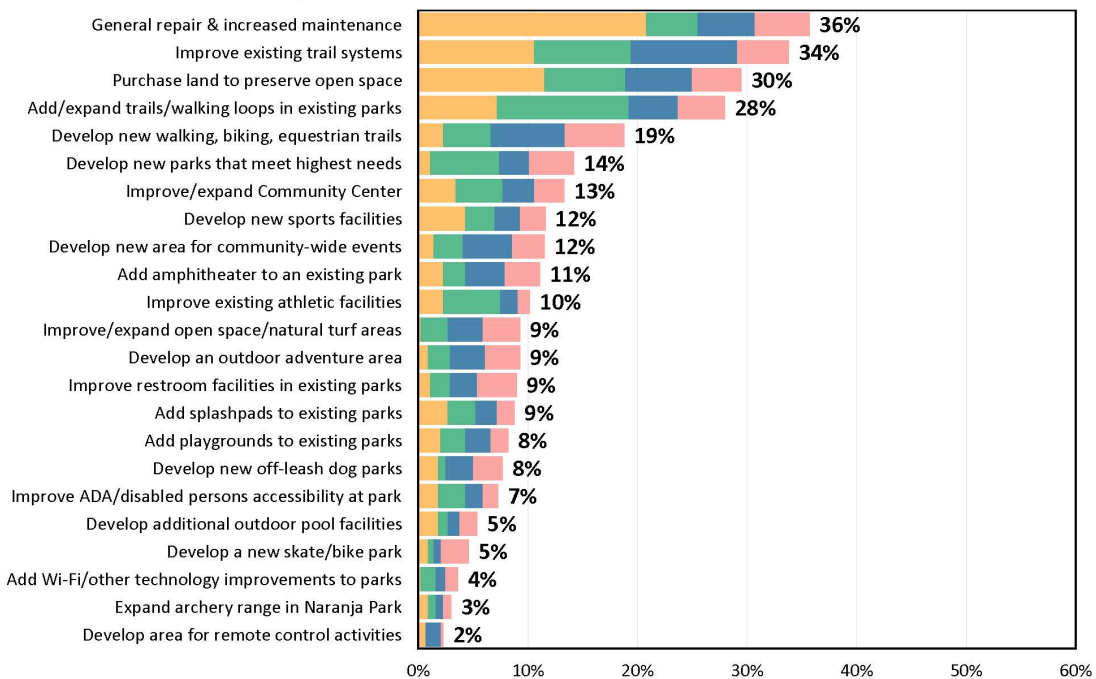
5.5.11 POTENTIAL IMPROVEMENTS MOST WILLING TO SUPPORT **WITHOUT A TAX INCREASE**

Respondents were asked to indicate their level of funding support for the improvements to the Oro Valley parks, trails, and recreation system.

- Based on the percentage of households who indicated support for improvements, 36% were most supportive of General Repair and Increased Maintenance to the existing systems.
- Other most supported actions include:
 - Improve Existing Trail Systems (34%).
 - Purchase Land to Preserve Open Space (30%).
 - Add/Expand Trails/Walking Loops in Existing Parks (28%).

Q11. Which **FOUR** actions from the list in Question 10 would you be **MOST SUPPORTIVE** of the Town of Oro Valley funding **WITHOUT A TAX INCREASE**?

by percentage of respondents who selected the items as one of their top four choices



Source: ETC Institute (2020)

Most Supportive 2nd Most Supportive 3rd Most Supportive 4th Most Supportive

5.6 NEEDS ASSESSMENT PRIORITY RANKINGS

The purpose of the Program and Facility Priority Rankings is to provide a prioritized list of facility/amenity needs and recreation program needs for the community served by Town of Oro Valley Parks and Recreation. This model evaluates the integration of both quantitative and qualitative data.

- Quantitative data includes the local demographics, recreation trends, statistically valid survey and the on-line.
- Qualitative data includes community input via stakeholder interviews, staff input, intercept surveys, the project website, and planning team observations.

A weighted scoring system was used to determine the priorities for recreation programs/services and facilities/amenities.

These weighted scores provide an overall score and priority ranking for the system as a whole. The results of the priority ranking are tabulated into three categories: High Priority (top third), Medium Priority (middle third), and Low Priority (bottom third).

5.6.1 PROGRAM AND SERVICE RANKINGS

Recreation Program/Service	Priority
Community special events	High
Fitness & wellness programs	
Adult learning classes	
Senior programs & services	
Art classes	
Walking/jogging/running/cycling clubs	Medium
Performing arts programs	
Golf lessons/clinics	
Environmental education programs	
Pickleball lessons/clinics	
Open swim	
Water fitness programs/lap swimming	Low
Weightlifting/bodybuilding programs	
Running events	
Reservation/rental of picnic shelters	
After school programs/out-of-school camps	
Tennis lessons & leagues	
Family-oriented programs	
Bicycle lessons & clubs	
Learn to swim programs	
Volleyball programs	
Soccer programs	
Programs for people with special needs	
Reservation/rental of indoor meeting space	
Archery	
Basketball programs	
Sand volleyball programs	
Recreation/competitive swim team	
Gymnastics	
Softball programs	
Reservation/rental of athletic fields	
Football programs	
Baseball programs	
Lacrosse programs	



5.6.2 FACILITY AND AMENITY RANKINGS

Facility/Amenity	Priority
Trails (natural surface)	High
Trails (multi-use paved)	
Open space conservation areas/trails	
Neighborhood parks	
Restroom buildings	
Large community parks	
Performing Arts Venue (stage)	
Community gardens	
Golf	Medium
Dog parks (off-leash)	
Recreation/community center	
Playgrounds	
Pavilions/picnic sites	
Amphitheater	
Aquatics facility-recreation/lap pool	
Aerobics/dance rooms/dance floors	
Aquatics facility-splash pad/water play features	
Pickleball courts	
Environmental education center	Low
Disc golf course	
Tennis courts	
Skateboarding/bicycle parks (concrete)	
Banquet/meeting rooms	
Basketball/volleyball courts-inside	
Baseball/softball fields	
Sand volleyball courts	
Remote control (RC) hobby facility	
Football/soccer/lacrosse fields	
Dirt bicycle pump/BMX track	
Basketball/volleyball courts-outside	
Archery range	
Aquatics facility-competition pool	

5.7 SUMMARY

The development of the Program/Service and Facility/Amenity Priority Rankings is the culmination of all the data created in the Needs Assessment Phase of the Master Plan. The rankings are critical foundational information to the development of Phase Two of the Master Plan. Phase Two of the Master Plan will include the following tasks and is expected to be completed in the Fall of 2020:

- Park Level of Service Standards and Geographical Analysis through Mapping
- Recreation Programming Assessment and Operational Funding Analysis
- Capital Improvement Plan
- Funding and Revenue Strategies for Capital Improvement Plan
- Strategic Action Plan Development
- Final Master Plan Development

CHAPTER SIX - PARK AND FACILITY ASSESSMENTS

6.1 PARK CLASSIFICATION AND PARK DESIGN PRINCIPLES

In developing design principles for parks, it is important that each park be programmed, planned, and designed to meet the needs of its service area and classification within the overall parks and recreation system. The term programming, when used in the context of planning and developing parkland, refers to a list of uses and facilities and does not always include staff-managed recreation programs. The program for a site can include such elements as ball fields, spray parks, shelters, restrooms, game courts, trails, natural resource stewardship, open meadows, nature preserves, or interpretive areas. These types of amenities are categorized as lead or support amenities. The needs of the population of the park it is intended to serve should be considered and accommodated at each type of park.

Every park, regardless of type, needs to have an established set of outcomes. Park planners and designers design to those outcomes, including operational and maintenance costs associated with the design outcomes.

Each park classification category serves a specific purpose, and the features and facilities in the park must be designed for the number of age segments the park is intended to serve, the desired length of stay deemed appropriate, and the uses it has been assigned. Recreation needs and services require different design standards based on the age segments that make up the community that will be using the park. A varying number of age segments will be accommodated with the park program depending on the classification of the park.

PLEASE NOTE: All parks and recreation facilities and amenities are required, by federal law, to adhere to Americans with Disabilities Act (ADA) regulations.

6.1.1 TERMINOLOGY UTILIZED IN PARK DESIGN PRINCIPLES

- **Land Usage:** The percentage of space identified for either passive use or active use in a park. A Parks, Recreation and Open Space Master Plan should follow land usage recommendations.
- **Programming:** Can include active or passive programming. Active means it is organized and planned with pre-registration by the user. Examples of active programming include sports leagues, day camps, and aquatics. Passive programming is self-directed by the user at their own pace. Examples of passive programming include playground usage, picnicking, disc golf, reading, or walking the dog.
- **Park/Facility Classifications:** Includes Pocket Park, Neighborhood Park, Community Park, Regional Park, Sports Complex Facility, Recreation/Special Use Park and Greenbelts and Conservation.
- **Revenue Facilities:** These include facilities that charge to play on them in the form of an access fee, player fee, team fee, or permit fee. These could include pools, golf courses, tennis courts, recreation centers, sport field complexes, concession facilities, hospitality centers, reservable shelters, outdoor or indoor theatre space, and special event spaces.
- **Signature Facility/Amenity:** This is an enhanced facility or amenity which is viewed by the community as deserving of special recognition due to its design, location, function, natural resources, etc.

Design Principles for each park classification are included in the following sections.



6.1.2 MINI PARKS

A mini park is a small outdoor space, usually less than 0.25 acres up to three acres, most often located in an urban area surrounded by commercial buildings or houses. Mini parks are small spaces that may serve a variety of functions, such as: small event space, play areas for children, spaces for relaxing and socializing, taking lunch breaks, etc. Successful mini parks have four key qualities: they are accessible; allow people to engage in activities; are comfortable spaces and inviting; and are sociable places. In general, mini parks offer minimal amenities on site and are not designed to support programmed activities. The service area for mini parks is usually less than a quarter-mile and they are intended for users within close walking distance of the park.

The Town of Oro Valley does not own any parks that fit the Mini Park classification.

6.1.3 NEIGHBORHOOD PARK

A neighborhood park should be three to 10 acres; however, some neighborhood parks are determined by use and facilities offered and not by size alone. The service radius for a neighborhood park is one mile. Neighborhood parks should have safe pedestrian access for surrounding residents; parking typically not provided for neighborhood parks less than 5 acres in size, but if included accounts for less than ten cars and provides for ADA access. Neighborhood parks serve the recreational and social focus of the adjoining neighborhoods and contribute to a distinct neighborhood identity.

- Service radius: 1.0-mile radius.
- Site Selection: On a local or collector street. If near an arterial street, provide natural or artificial barrier. Where possible, next to a school. Encourage location to link subdivisions and linked by trails to other parks.
- Length of stay: One-hour experience or less.
- Amenities: One signature amenity (e.g. playground, spray ground park, sport court, gazebo); no restrooms unless necessary for signature amenity; may include one non-programmed sports field; playgrounds for ages 2-5 and 5-12; no reservable shelters; loop trails; one type of sport court; benches, small picnic shelters next to play areas.
- Landscape Design: Appropriate design to enhance the park theme/use/experience.
- Revenue facilities: none.
- Land usage: 85 percent active/15 percent passive.
- Programming: Typically, none, but a signature amenity may be included which is programmed.
- Maintenance Standards: Provide the highest-level maintenance with available funding. Seek a goal of Level 2 maintenance standards. Some amenities may require Level 1 maintenance.
- Signage: Directional signage and facility/amenity regulations to enhance user experience.
- Parking: Design should include widened on-street parking area adjacent to park. Goal is to maximize usable park space. As necessary, provide 5-10 spaces within park including accessible spaces. Traffic calming devices encouraged next to park.
- Lighting: Security only.
- Size of park: Typically, Three to 10 acres.

The Town of Oro Valley does not own any parks that fit the Neighborhood Park classification.

6.1.4 COMMUNITY PARK

Community parks are intended to be accessible to multiple neighborhoods and should focus on meeting community-based recreational needs, as well as preserving unique landscapes and open spaces. Community parks are generally larger in scale than neighborhood parks, but smaller than regional parks and are designed typically for residents who live within a three-mile radius. When possible, the park may be developed adjacent to a school. Community parks provide recreational opportunities for the entire family and often contain facilities for specific recreational purposes: athletic fields, tennis courts, extreme sports amenity, loop trails, picnic areas, reservable picnic shelters, sports courts, restrooms with drinking fountains, large turf and landscaped areas and a playground or spray ground. Passive outdoor recreation activities such as meditation, quiet reflection, and wildlife watching also take place at community parks.

Community parks generally range from 10 to 75 acres depending on the community. Community parks serve a larger area - radius of one to three miles and contain more recreation amenities than a Neighborhood park.

- Service radius: One to three-mile radius.
- Site Selection: On two collector streets minimum and preferably one arterial street. If near an arterial street, provide natural or artificial barrier. Minimal number of residences abutting site. Preference is streets on four sides, or three sides with school or municipal use on fourth side. Encourage trail linkage to other parks.
- Length of stay: Two to three hours experience.
- Amenities: Four signature amenities at a minimum: (e.g., trails, sports fields, large shelters/pavilions, community playground for ages 2-5 and 5-12 with some shaded elements, recreation center, pool or family aquatic center, sports courts, water feature); public restrooms with drinking fountains, ample parking, and security lighting. Sport Fields and Sport Complexes are typical at this park.
- Revenue facilities: One or more (e.g. pool, sports complex, pavilion).
- Land usage: 65 percent active and 35 percent passive.
- Maintenance Standards: Provide the highest-level maintenance with available funding. Seek a goal of Level 2 maintenance standards. Some amenities may require Level 1 maintenance.
- Parking: Sufficient to support the amenities; occupies no more than 10 percent of the park. Design should include widened on-street parking area adjacent to park. Goal is to maximize usable park space. Traffic calming devices encouraged within and next to the park.
- Lighting: Amenity lighting includes sport field light standards.
- Signage: Directional signage and facility/amenity regulations to enhance user experience. May include kiosks in easily identified areas of the facility.
- Landscape Design: Appropriate design to enhance the park theme/use/experience. Enhanced landscaping at park entrances and throughout park.
- Other: Strong appeal to surrounding neighborhoods; loop trail connectivity; linked to Regional Park, trail or recreation facility.
- Size of park: Typically, 10 to 75 acres.



James D. Kriegh Park and Riverfront Park are Town of Oro Valley parks that fit the Community Park classification.

6.1.5 REGIONAL PARK

A regional park functions as a destination location that serves a large area of several communities, residents within a Town, City or County, or across multiple counties. Depending on activities within a Regional park, users may travel as many as 60 miles for a visit. Regional parks include recreational opportunities such as soccer, softball, golf, boating, camping, conservation-wildlife viewing and fishing. Although regional parks usually have a combination of passive areas and active facilities, they are likely to be predominantly natural resource-based parks.

A common size for a regional park is 75 to 1,000 acres but some parks can be 2,000 to 5,000 acres in size. A regional park focuses on activities and natural features not included in most types of parks and often based on a specific scenic or recreational opportunity. Facilities could include those found in a community park and have specialized amenities such as an art center, amphitheater, boating facility, golf course, or natural area with interpretive trails. Regional parks can and should promote tourism and economic development. Regional parks can enhance the economic vitality and identity of the entire region.

- Service radius: Three mile or greater radius.
- Site Selection: Prefer location which can preserve natural resources on-site such as wetlands, streams, and other geographic features or sites with significant cultural or historic features. Significantly large parcel of land. Access from public roads capable of handling anticipated traffic.
- Length of stay: All or multiple day experience.
- Amenities: 10 to 12 amenities to create a signature facility (e.g. golf course, tennis complex, sports complex, lake, regional playground, 3+ reservable picnic shelters, camping, outdoor recreation/extreme sports, recreation center, pool, gardens, trails, zoo, specialty facilities); restrooms with drinking fountains, concessions, restaurant, ample parking, special event site. Sport Fields and Sport Complexes are typical at this park.
- Revenue facilities: Typically, park designed to produce revenue to offset operational costs.
- Land usage: Up to 50 percent active/50 percent passive.
- Maintenance Standards: Provide the highest-level maintenance with available funding. Seek a goal of Level 2 maintenance standards. Some amenities may require Level 1 maintenance.
- Parking: Sufficient for all amenities. Traffic calming devices encouraged within and next to park.
- Lighting: Amenity lighting includes sport field light standards.
- Signage: Directional signage and facility/amenity regulations to enhance user experience, may include kiosks in easily identified areas of the facility.
- Landscape Design: Appropriate design to enhance the park theme/use/experience. Enhanced landscaping at park entrances and throughout park.
- Other: Linked to major trails systems, public transportation available, concessions, and food and retail sales available, dedicated site managers on duty. Wi-Fi and Telephone/Cable TV conduit.
- Size of park: Typically, 75 to 1,000 acres.

Naranja Park is a Town of Oro Valley park that fits the Regional Park classification.

6.1.6 SPORTS COMPLEX

Sports complexes at community parks, regional parks, and stand-alone sports complexes are developed to provide 4 to 16+ fields or courts in one setting. A sports complex may also support extreme sports facilities, such as BMX and skateboarding. Sports complexes can be single focused or multi-focused and can include indoor or outdoor facilities to serve the needs of both youth and adults. Outdoor fields should be lighted to maximize value and productivity of the complex. Agencies developing sports complexes focus on meeting the needs of residents while also attracting sport tournaments for economic purposes to the community.

Sport field design includes appropriate field distances for each sport's governing body and support amenities designed to produce revenue to offset operational costs.

Signature sports complexes include enhanced amenities such as artificial turf, multipurpose field benches and bleachers, scoreboards, amplified sound, scorer's booths, etc. Enhanced amenities would be identified through discussion between Town and Schools and or sports associations and dependent upon adequate funding.

- Service radius: Determined by community demand.
- Site Selection: Stand-alone sports complexes are strategically located on or near arterial streets. Refer to community or regional Park sections if sport complex located within a park. Preference is streets on four sides, or three sides with school or municipal use on fourth side.
- Length of stay: Two to three hours experience for single activities. Can be all day for tournaments or special events.
- Amenities: Four to sixteen or more fields or sports courts in one setting; restrooms, ample parking, turf types appropriate for the facility and anticipated usage, and field lighting.
- Revenue facilities: Four or more (e.g. fields, concession stand, picnic pavilion).
- Land usage: 95 percent active and 5 percent passive.
- Programming: Focus on active programming of all amenities.
- Parking: Sufficient to support the amenities. Traffic calming devices encouraged within and next to park.
- Lighting: Amenity lighting includes sport field light standards.
- Signage: Directional signage and facility/amenity regulations to enhance user experience. May include kiosks in easily identified areas of the facility.
- Landscape Design: Appropriate design to enhance the park theme/use/experience. Enhanced landscaping at entrances and throughout complex.
- Size of park: Preferably 20 or more acres for stand-alone complexes.

The Town of Oro Valley does not own any parks that fit the Sports Complex classification.



6.1.7 RECREATION/SPECIAL USE AREAS

Recreation/special use areas are those spaces that don't fall within a typical park classification. A major difference between a special use facility and other parks is that they usually serve a single purpose whereas other park classifications are designed to offer multiple recreation opportunities. It is possible for a special use facility to be located inside another park. Special use facilities generally fall into four categories:

- **Cemeteries** - burial-ground that is generally viewed as a large public park or ground laid out expressly for the interment of the dead. Cemeteries are normally distinct from churchyards, which are typically consecrated according to one denomination and are attached directly to a single place of worship. Cemeteries can be viewed as historic sites.
- **Historic/Cultural/Social Sites** - unique local resources offering historical, educational, and cultural opportunities. Examples include historic downtown areas, plaza parks, performing arts parks, arboretums, display gardens, performing arts facilities, indoor theaters, churches, and amphitheaters. Frequently these are located in community or regional parks. *The Indian Heritage Museum site, currently being planned by the State, would fall into this category.*
- **Indoor Recreation Facilities** - specialized or single purpose facilities. Examples include community centers, senior centers and community theaters. Frequently these are located in community or regional Parks.
- **Outdoor Recreation Facilities** - Examples include baseball stadiums, aquatic parks, disc golf, skateboard, BMX, and dog parks, which may be located in a park.
 - Size of park: Depends upon facilities and activities included. Their diverse character makes it impossible to apply acreage standards.
 - Service radius: Depends upon facilities and activities included. Typically serves special user groups while a few serve the entire population.
 - Site Selection: Given the variety of potential uses, no specific standards are defined for site selection.
 - Length of stay: varies by facility.
 - Amenities: varies by facility.
 - Revenue facilities: Due to nature of certain facilities, revenue may be required for construction and/or annual maintenance. This should be determined at a policy level before the facility is planned and constructed.
 - Land usage: varies by facility.
 - Programming: varies by facility.
 - Maintenance Standards: Provide the highest-level maintenance with available funding.
 - Parking: On-street or off-street parking is provided as appropriate. Goal is to maximize usable park space. As necessary, provide a minimum of five to 10 spaces within park including accessible spaces. Traffic calming devices encouraged next to park.
 - Lighting: Security or amenity only.
 - Signage: Directional and regulation signage to enhance user experience.

- Landscape Design: Appropriate design to enhance the park theme/use/experience.

The Aquatic Center, the Community Center, Steam Pump Ranch and El Conquistador Golf & Tennis at Pusch Ridge are Town of Oro Valley assets that fit the Recreation/Special Use Areas classification.

6.1.8 CONSERVATION AREA/TRAIL PARKS

Conservation area/trail parks are undeveloped but may include natural or paved trails. Conservation area/trail parks contain natural resources that can be managed for recreation and natural resource conservation values such as a desire to protect wildlife habitat, water quality and endangered species. Conservation area/trail parks also can provide opportunities for nature-based, unstructured, low-impact recreational opportunities such as walking and nature viewing.

- Amenities: May include paved or natural trails, wildlife viewing areas, mountain biking, disc golf, interpretation and education facilities.
- Maintenance standards: Demand-based maintenance with available funding.
- Lighting: None.
- Signage: Interpretive kiosks as deemed appropriate.
- Landscape Design: Generally, none. Some areas may include landscaping, such as entryways or around buildings. In these situations, sustainable design is appropriate.

Honey Bee Canyon and West Lambert Lane Park are the Town of Oro Valley parks that fit the Conservation Area/Trail Park classification.

6.1.9 GREENBELTS/TRAILS CORRIDORS

Greenbelts/Trails Corridors are recognized for their ability to connect people and places while serving as active transportation facilities. Linking neighborhoods, parks, recreation facilities, attractions, and natural areas with a multi-use trail fulfills three guiding principles simultaneously: protecting natural areas along river and open space areas and providing people with a way to access and enjoy them. Multi-use trails also offer a safe, alternative form of active transportation, provide substantial health benefits, habitat enhancements for plants and wildlife, and unique opportunities for outdoor education and cultural interpretation.

- Site Selection: Located consistent with approved Bicycle, Pedestrian and Trails Master Plan or the like.
- Amenities: Parking and restrooms at major trailheads. May include small parks along the trail.
- Maintenance standards: Demand-based maintenance with available funding. Biological management practices observed.
- Lighting: Security lighting at trailheads and along trail is preferred.
- Signage: Mileage markers at ¼ mile intervals. Interpretive kiosks at all trailheads and where deemed necessary.
- Landscape Design: Coordinated planting scheme in urban areas. Limited or no planting in open space areas.
- Other: Connectivity to parks or other Town attractions and facilities is desirable.



- Size: Typically, at least 30 ft. width of unencumbered land for a Greenbelt. May include a trail to support walk, bike, run, equestrian type activities. Typically, an urban trail is 8-10 feet wide to support pedestrian and bicycle uses. Trails incorporate signage to designate where a user is located and where the trails connect in the Town.

CDO Shared Use Path is a Town of Oro Valley asset that fits the Greenbelt/Trails Corridor classification.

6.2 DEVELOPED PARK/FACILITY INVENTORY AND ASSESSMENT

An assessment and general onsite inspection of each park, facility and grounds property managed by the Department was completed utilizing the following asset condition rating system. An inventory and overall assessment for the entire system has been provided as separate stand-alone documents.

6.2.1 CONDITION RATING CRITERIA

A = Excellent

- Looks new and is in excellent mechanical and aesthetic condition.

B = Very Good

- Has minor mechanical and equipment defects but is in excellent mechanical and aesthetic condition.

C = Good

- Has some repairable mechanical and equipment defects and is free of major problems.

D = Fair

- Has some mechanical and equipment defects that require major repair and/or replacement.

F = Poor

- Has major defects and requires significant lifecycle replacement.

6.2.2 LIFECYCLE STAGE CRITERIA

In addition to conducting an overall assessment of each park, a determination was made on the lifecycle stage of the assets of each park. Lifecycle stage was identified as:

Priority 1 = Currently Critical

- Conditions in this category require immediate action by the end of the current fiscal year.

Priority 2 = Potentially Critical

- Conditions in this category, if not corrected expeditiously, will become critical soon.

Priority 3 = Necessary, But Not Yet Critical

- Conditions in this category require appropriate attention to preclude predictable deterioration and associated damage or higher costs if deferred further.

Priority 4 = Recommended

- Conditions in this category include items that represent a sensible improvement to existing conditions, include finishes that have deteriorated and are required to maintain the required aesthetic standards. These are not required for the most basic functioning of the facility.

Priority 5 = Early in Lifecycle

- Conditions in this category function properly and are early enough in their lifecycle that improvements are not currently needed.

The table below summarizes the assessment of the Town's parks system.

ASSET CONDITION AND LIFECYCLE RATINGS				
EXISTING PARKS				
Park	Park Classification	Acreage	Overall Condition Rating	Overall Lifecycle Tier
CDO Shared Use Path	Greenbelt/Trail Corridor	5.8	B	3
El Conquistador Golf & Tennis at Pusch Ridge	Recreation/Special Use Area	NA	B	2
Honeybee Canyon Park	Conservation Area/Trail Park	7.7	A	4
James D. Kriegh Park	Community Park	18	C	3
Naranja Park	Regional Park	4.5	B-C	4
Riverfront Park	Community Park	30	B	4
Steam Pump Ranch	Recreation/Special Use Area	15.2	B-C	3
West Lambert Lane Park	Conservation Area/Trail Park	40	B	4
EXISTING RECREATION FACILITIES				
Facility	Facility Classification	Acreage	Condition Rating	Lifecycle Tier
Oro Valley Aquatic Center	Recreation/Special Use Area	NA	B	4
Oro Valley Community Center	Recreation/Special Use Area	NA	B-C	3

A comprehensive inventory and assessment technical report has been provided to the Town as a stand-alone document.

