DEMOGRAPHIC AND TRENDS ANALYSIS

PROS Consulting determined the size of the market, as well as other underserved program markets surrounding the MetroParks and in the service area of Mahoning County, which includes specific age distribution, population density, household income, race/ethnicity, and income characteristics. This data was applied to national trends in order to estimate potential user groups to aid in improved understanding of the market. All demographic projections are based on historical trends and are projected out utilizing straight line linear regression.

DEMOGRAPHIC OVERVIEW

Mahoning County's population has declined slowly over the last decade. From 1990 to 2000, the **total population** declined by 0.28%, from a reported 264,806 to the reported population of 257,555. In 2010, the population decreased to 239,668. Over the next five years, it is projected that the County's population will continue to decrease, as projections place the 2015 population at 230,025; a 0.82% decline from 2010. The gender composition for the County is almost evenly split, with 48% of the total current population being male, a trend that is projected to remain fairly constant.

The **population by major age segment** is very similar to the national norms. Mahoning County's largest individual age segment is 45-54, which is consistent with the typical aging trends, making the median age of 42.2. 31.4% of the population is 55+, which is substantially older than the National aging trends in the United States. Nationally, the major age segment is 45-54 with a median age of 37, and 21% of the population age 55 or older.

The County does not have a very diverse populace. Currently, **race and ethnicity** is comprised of persons identified as white (80.2%) and black (15.7%), with the remaining 4.1% distributed among all other races. The diversity index of the County has gone from 35.7 in 2000 to 38.3 in 2010.

The **income characteristics** are slightly lower than national averages and are projected to slowly increase in upcoming years. The County's median household income was $35,237 in 2000 and is currently estimated at $44,280. These numbers compare favorably to the current national median household income of $54,552.

METHODOLOGY

Demographic data used for the analysis was obtained from Environmental Systems Research Institute, Inc. (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 October 2011 (i.e. *Source: ESRI; 2011 10*) and reflects actual numbers as reported in the 1990/2000 Census. Despite the new census that was completed in 2010, detailed, updated numbers have not yet been made available through ESRI; hence, it currently reports estimation for 2010. The boundaries used for Mahoning County are shown below (**Figure 1**).

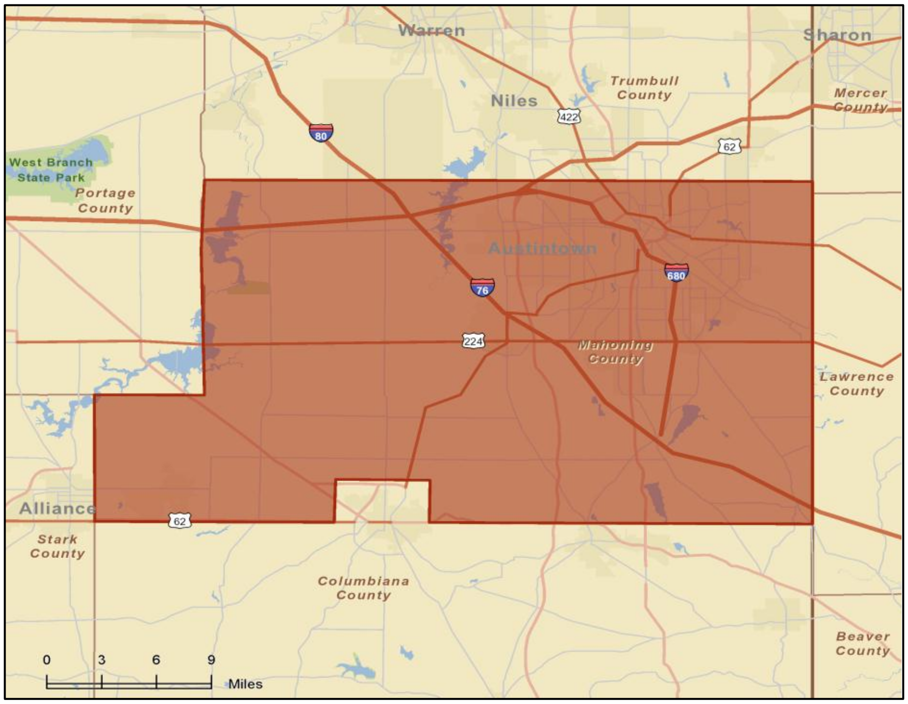


Figure 1 - Mahoning County Jurisdictional Boundaries

RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity from Federal statistics, program administrative reporting and civil rights compliance reporting are defined below. The Census 2000 data on race is not directly comparable with data from the 1990 Census and earlier censuses; caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2000) definitions and nomenclature are used within this chapter of the Master Plan.

- American Indian – 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 – 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 – A person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander – A person having origins in any of the original peoples of Hawaii, Guam, Samoa or other Pacific Islands
- White – A person having origins in any of the original peoples of Europe, the Middle East or North Africa
- Hispanic or Latino – An ethnic distinction, a subset of a race as defined by the Federal Government; a person of Cuban, Mexican, Puerto Rico, South or Central American or other Spanish culture or origin, regardless of race

MAHONING COUNTY POPULACE

POPULATION

Mahoning County's population has slowly declined since 1990. From 1990 to 2000, the population decreased by 0.28% from 264,806 to 257,555. From 2000 to 2010, the population continued to decrease 0.7% to 239,668. Five year projections reflect a continued decrease in the populace; from 2010 to 2015 it is projected the County's population will decrease to 230,025, a 0.82% decrease (**Figure 2**).

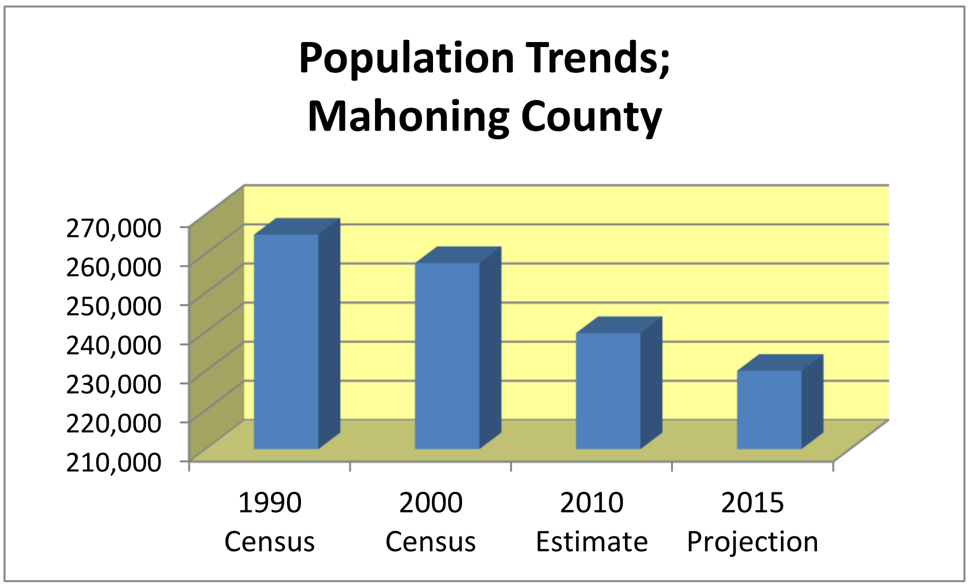


Figure 2 - Total Population Trends

AGE SEGMENT

In the 2010 estimate, the top three age segments in terms of total persons have been and are projected to remain consistent, in order of magnitude, 45-54 years of age, 55-64 years of age and 35-44 years of age. The four smallest age segments consist of persons aged 85+, 20-24 years of age, 0-4 years of age and 5-9 years of age, which makes up 20% of the County's population.

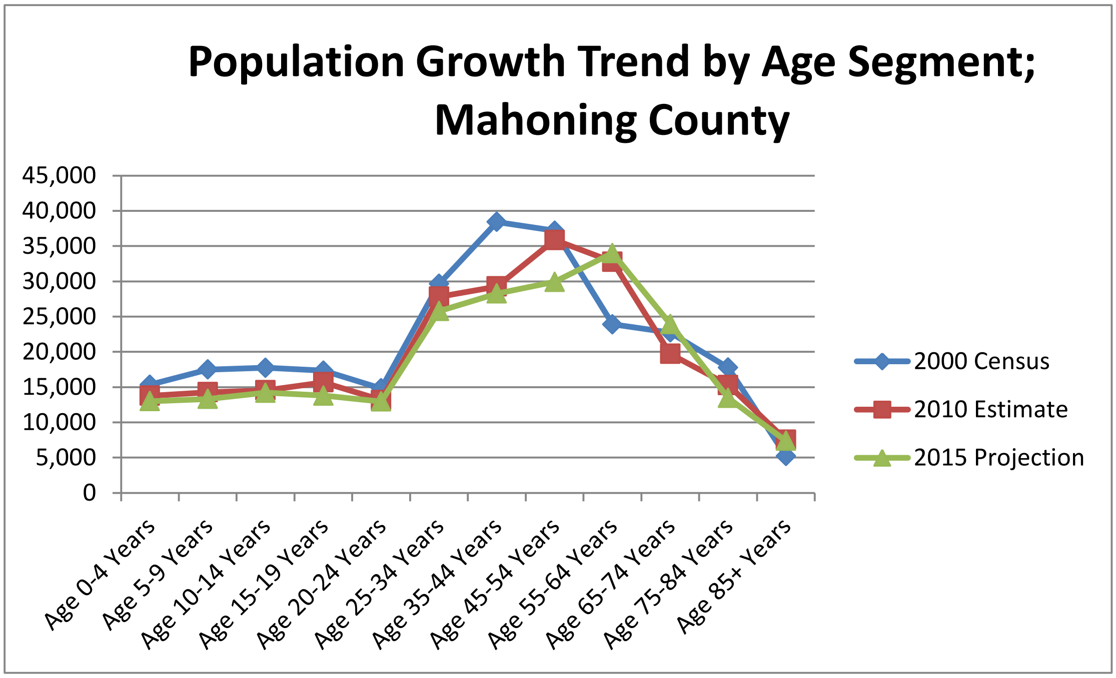


Figure 3 - Population by Major Age Segment

	2000 Census	2010 Estimate	2015 Projection
Age 0-4 Years	15,332	13,765	13,010
Age 5-9 Years	17,480	14,263	13,314
Age 10-14 Years	17,735	14,544	14,191
Age 15-19 Years	17,334	15,669	13,785
Age 20-24 Years	14,810	13,166	12,962
Age 25-34 Years	29,626	27,827	25,781
Age 35-44 Years	38,417	29,266	28,282
Age 45-54 Years	37,187	35,878	29,931
Age 55-64 Years	23,905	32,775	34,003
Age 65-74 Years	22,750	19,704	23,937
Age 75-84 Years	17,757	15,296	13,462
Age 85+ Years	5,222	7,515	7,367
Total	257,555	239,668	230,025
Median Age	39.7	42.2	42.7

Figure 4 - Population by Age Segment and Median Age

GENDER

The gender distribution for the County is almost evenly split between the genders. Male totals account for 48% of the total population (**Figure 5**). The distribution is projected to remain constant throughout the next five years.

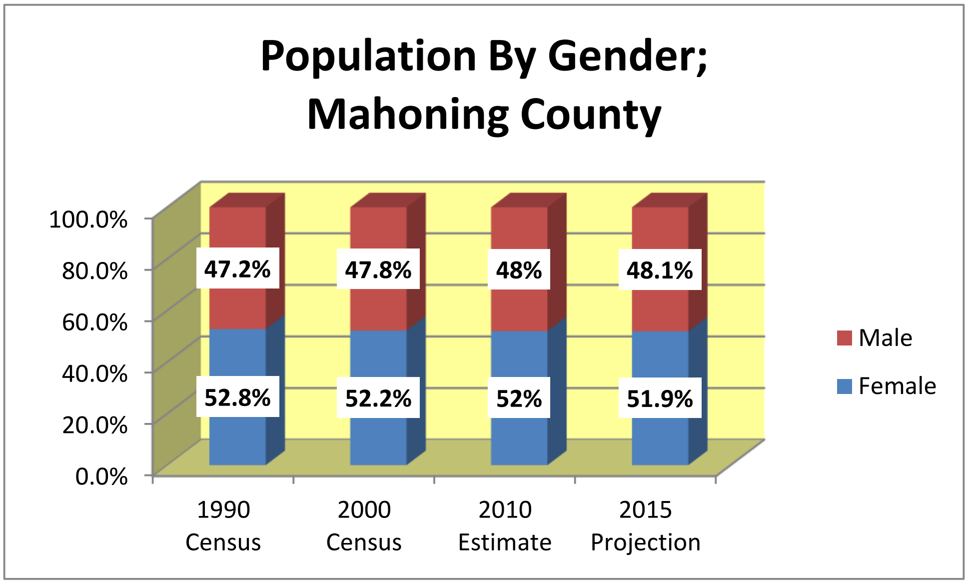


Figure 5 - Population by Gender

Recreational trends from the last few years indicate that, on average, Americans participate in a sport or recreational activity of some kind at a relatively high rate (65%). Female participation rates, however, are slightly lower than their male counterparts; 61% of females participate at least once per year in a sport or recreational activity, compared to a 69% participation rate of men. According to recreational trends research performed in the industry over the past twenty years, the top ten recreational activities for **<u>females</u>** currently include:

1. Walking
2. Aerobics
3. General exercising
4. Biking
5. Jogging
6. Basketball
7. Lifting weights
8. Golf
9. Swimming
10. Tennis

The top ten recreational activities for **males** currently include:

1. Golf
2. Basketball
3. Walking
4. Jogging
5. Biking
6. Lifting weights
7. Football
8. Hiking
9. Fishing
10. Hunting

While men and women share a desire for six of the top ten recreational activities listed above, men claim to participate in their favorite activities more often than women in any ninety-day span. With more women not only comprising a larger portion of the general populace during the mature stages of their lifecycle, but also participating in recreational activities further into adulthood, a relatively new market has appeared over the last two decades.

This mature female demographic is opting for less team oriented activities, which dominate the female youth recreational environment, instead shifting more towards a diverse selection of individual participant activities, as evident in the top ten recreational activities mentioned above.

RACE AND ETHNICITY

Racial composition of a populace provides guidance for decision making based on historical and cultural heritage. In the case of Mahoning County, persons classified as white account for 80.2% of the populace; persons classified as black make up the next largest racial category (15.7%) of the population (**Figure 6**).

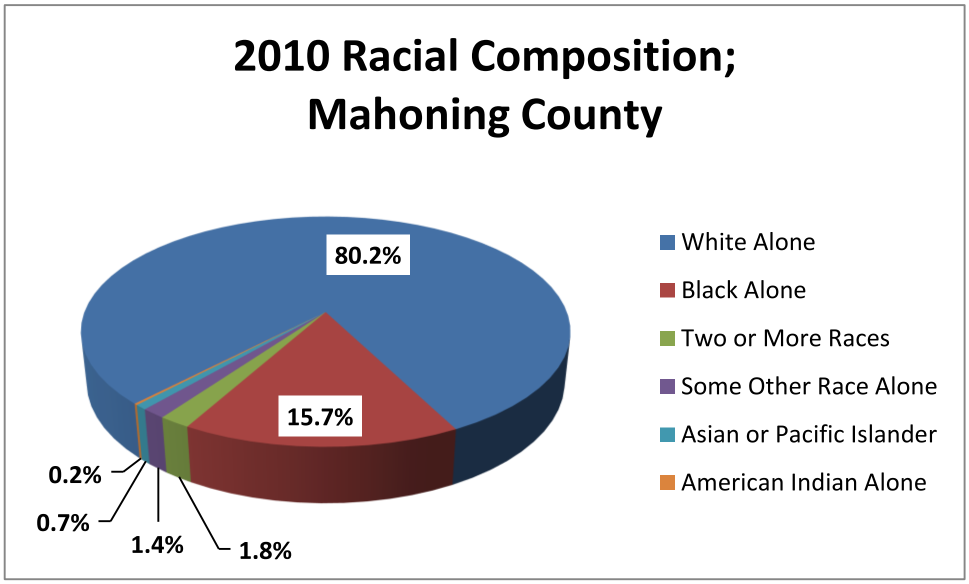


Figure 6 - Population by Race/Ethnicity

To put the racial composition in perspective, current estimates place the white populace at 192,214, the black populace at 37,628 and all other categories at a combined 9,826.

PARTICIPATION TRENDS BY RACE/ETHNICITY

Utilizing the Ethnicity Study performed by American Sports Data, Inc., a national leader in sports and fitness trends, participation rates among recreational and sporting activities were analyzed and applied to all major race/ethnic groups in the studied area.

The white population as a whole participates in a wide range of activities, including both team and individual sports of a land and water based variety; however, the white populace has an affinity for outdoor, non-traditional sports.

Ethnic minority groups in the United States are strongly regionalized and urbanized, with the exception of Native Americans, and these trends are projected to continue. Different ethnic groups have different needs when it comes to recreational activities. Ethnic minority groups, along with Generations X and Y, are coming in ever-greater contact with white middle-class baby-boomers who possess different recreational habits and preferences. This can be a sensitive subject because many baby-boomers are the last demographic to have graduated high school in segregated environments, and the generational gap magnifies numerous ideals and values differences, which many baby-boomers are accustomed to. This trend is projected to increase as more baby-boomers begin to retire and both the minority and youth populations continue to increase.

The black population has historically been an ethnic group that participates in active team sports, most notably football, basketball and baseball. The African-American populace exhibits a strong sense of neighborhood and local community through large special events and gatherings with extended family and friends, including family reunions. Outdoor and water-based activities, such as hiking, water skiing, rafting and mountain biking, are not large factors in their participatory recreational activities.

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

The Asian population is a very different and distinct ethnic group in comparison with the three main groups in the U.S. – Caucasian, African-American and Hispanic. The Asian population has some similarities to the Hispanic population, but many seem to shy away from traditional team sports and outdoor and water-based activities.

A participation index was also reviewed. An index is a gauge of likelihood that a specific ethnic group will participate in an activity as compared to the U.S. population as a whole. An index of one-hundred signifies that participation is on par with the general population; an index less than one-hundred means that the segment is less likely to participate, more than one-hundred signifies the group is more likely than the general public to participate.

The most popular activities for those classified as **white** in terms of total participation percentage, the percentage by which you can multiply the entire population by to arrive at activity participation of at least once in the past twelve months, are:

1. Recreational Swimming – 38.9% participation rate (38.9% of the population has participated at least once in the last year)
2. Recreational Walking – 37.0% participation rate
3. Recreational Bicycling – 20.6% participation rate
4. Bowling – 20.4% participation rate
5. Treadmill Exercise – 19.1% participation rate

High participation percentages in freshwater fishing (17.3% participation rate), hiking (17.2% participation rate) and tent camping (17.2% participation rate) demonstrate the high value that the Caucasian population places on outdoor activities. Sailing (Index of 124), kayaking (Index of 121) and golf (Index of 120) are three activities that the Caucasian population is more likely to participate in than the general public.

Analyzing the top five activities that the **black** populace participates in at the greatest rate results in:

1. Recreational Walking – 26.7% participation rate
2. Recreational Swimming – 20.2% participation rate
3. Basketball – 19.8% participation rate
4. Bowling – 17.5% participation rate
5. Running/Jogging – 14.3% participation rate

The African-American population, like the Hispanic population, is more than twice as likely to participate in boxing (Index of 208). Football (Index of 199) and basketball (Index of 160) are also among the higher participated in activities among the African-American populace.

The five most popular activities for those of **Hispanic/Latino** descent are:

1. Recreational Swimming – 33.2% participation rate
2. Recreational Walking – 31.2% participation rate
3. Recreational Bicycling – 19.7% participation rate
4. Bowling – 18.5% participation rate
5. Running/Jogging – 18.0% participation rate

In terms of participation index, the Hispanic populace is more than twice as likely as the general population to participate in boxing (Index of 264), very likely to participate in soccer (Index of 177) and more likely to participate in paintball (Index of 155) than any other ethnic group. For comparison reasons, although Hispanics are nearly twice as likely to participate in soccer as any other race, only 9.0% of the Hispanic population participated in the sport at least once in the last year.

The top five recreational activities for the **Asian** populace in regards to participation percentages are:

1. Recreational Walking – 33.3% participation rate
2. Recreational Swimming – 31.9% participation rate
3. Running/Jogging – 21.6% participation rate
4. Bowling – 20.5% participation rate
5. Treadmill Exercise – 20.3% participation rate

The Asian populace participates in multiple recreational activities at a greater rate than the general population, with lacrosse being the activity boasting the greatest index of 615. Squash (Index 0f 414), mountain/rock climbing (Index of 262), yoga/tai chi (Index 229), martial arts (227), artificial wall climbing (224), badminton (222) and rowing machine exercise (206) each represent an activity that Asians are more than twice as likely to participate in than the general public.

HOUSEHOLDS AND INCOME

The County's household count has changed from 257,555, as reported in Census 2000, to an estimated 239,668 in 2010, a decrease of 17,887 people. The five-year projections place household totals at 230,025 in 2015, a projected change of another 9,643 from the 2010 total. Average household size is currently estimated at 2.37 persons, compared to 2.44 in year 2000. The number of families in the current year is 64,574 in the market area.

Currently, 62.4% of the 112,894 housing units in the market area are owner occupied; 24.6% are renter occupied and 13% are vacant. These numbers are fairly unchanged since Census 2000.

Home values statistics are:

- Median home value (2010) in the demographic area is $87,311, compared to a median home value of $157,913 for the US.
    - It is projected that in 2015, the median home value will increase to $91,764.

Household income characteristics are lower than the national averages. Statistics are as follows:

- Current median household income is $44,280, compared to $54,552 for all US households.
  - Median household income is projected to reach $51,554 by 2015.
  - In 2000, median household income was $35,237.
- Current average household income is $54,592, compared to $70,173 for all US households.
  - Average household income is projected to reach $60,678 in 2015.
  - In 2000, average household income was $46,315.
- Current per capita income is $22,806, compared to US per capita income of $26,739.
  - The per capita income is projected to be $25,547 by 2015.
  - In 2000, the per capita income was $18,818.

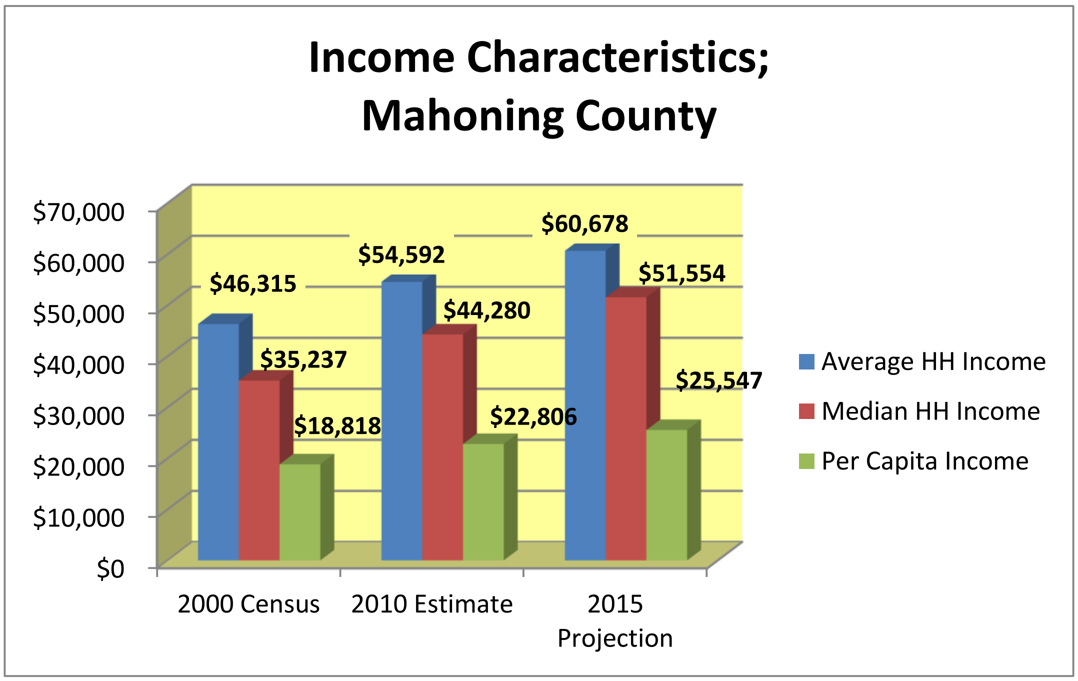


Figure 7 - Income Characteristics

In terms of disposable income, income available for household and personal expenditures after all applicable taxes, the target market area has an estimated average disposable income of $45,053. Average disposable income, or discretionary income available to the consumer, extrapolates to $3,754 per month for households. Average disposable income by age of householder ranks as follows:

- Age of householder 45-54 - $53,706 average of disposable income
- Age of householder 55-64 - $50,779 average of disposable income
- Age of householder 35-44 - $48,943 average of disposable income
- Age of householder 25-34 - $41,930 average of disposable income
- Age of householder 65-74 - $38,208 average of disposable income
- Age of householder <25 - $33,387 average of disposable income
- Age of householder 75+ - $33,222 average of disposable income

Typically, the economy's performance has a trickle-down effect on recreation, meaning a poor performing economy leads to less disposable income by requiring individuals and families to dedicate larger sums of money to necessities and less to discretionary items.

When viewed in context with average household expenditures, the disposable income available for the target area residents does not appear to be a great threat to entertainment and recreational spending. Household spending on all entertainment and recreation ranks a respectable fifth out of fourteen categories (**Figure 8**).

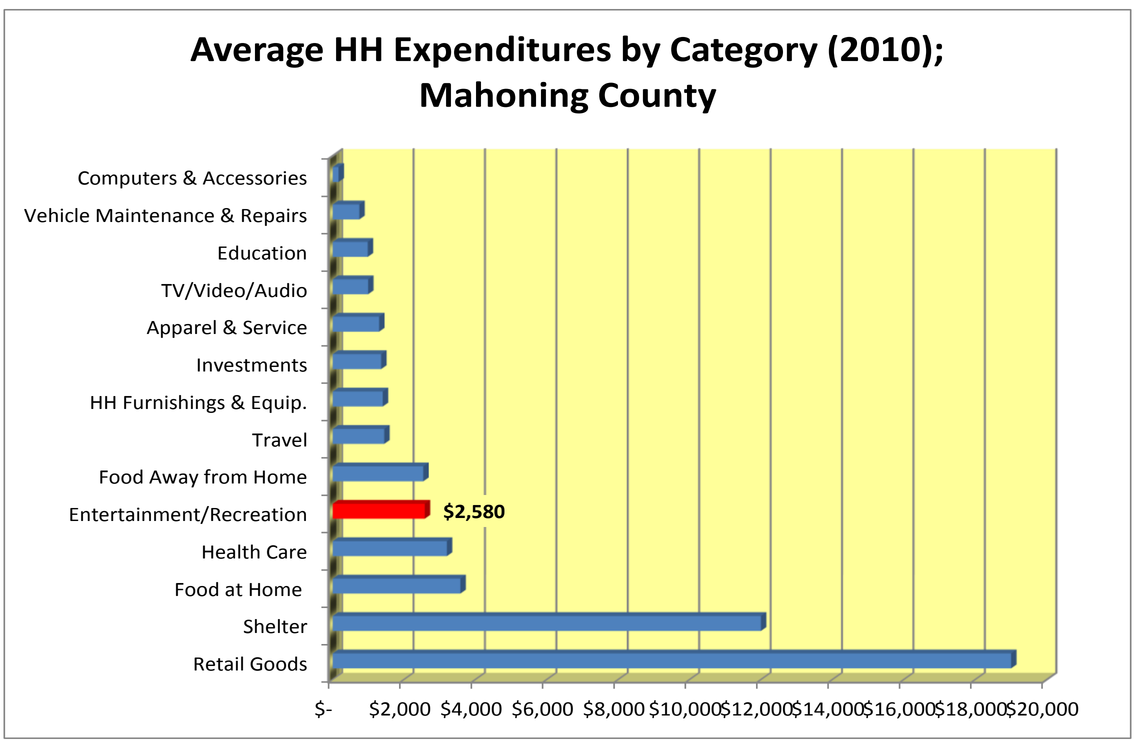


Figure 8 - Average Household Expenditures; 2010

RECREATIONAL TRENDS ANALYSIS

Information released by the Sporting Goods Manufacturers Association (SGMA) 2010 study of Sports, Fitness and Recreation Participation reveals that most of the popular sport and recreational activities include, walking, treadmill, running/jogging, bicycling and billiards/pool. Most of these activities appeal to both young and old alike, can be done in most environments, can be enjoyed regardless of level of skill and have minimal economic barriers to entry. These popular activities also have appeal because of the social aspect: people enjoy walking and biking together and, although fitness activities are mainly self-directed, many can offer a degree of camaraderie.

Walking has remained one of the two most participated in activities of the past decade. Walking participation during the last year data was available (2010), reported 114 million Americans walked at least once.

From a traditional team sport standpoint, basketball ranks highest among all sports in terms of participatory base with 26.3 million persons reportedly participating in 2010. Two sports experiencing participation and growth are lacrosse and tennis, as both have seen double-digit growth over the past decade; lacrosse has outright exploded. Ultimately, the greatest growth of participation in recreational activities has occurred in activities that have low barriers to entry, can be undertaken within close proximity to home and can be completed in a limited amount of time.

TRENDING SOURCE

The Sporting Goods Manufacturers Association (SGMA) Sports, Fitness & Recreational Activities Topline Participation Report 2011 was utilized to evaluate national sport and fitness participatory trends. SGMA is the primary source for sport and fitness research. The study is based on online interviews carried out in January and February 2011 from more than 38,000 individuals and households.

TRADITIONAL "BAT AND BALL" AND TEAM SPORTS

Traditional sports, often referred to as the social glue that bonds the country, play an important role in American society. By teaching important values of teamwork and discipline while stressing physical fitness and a healthy lifestyle, sports have been the building block for many Americans.

Basketball, a game originating in the US, is actually the most participated in sport among the traditional "bat and ball" sports with more than twenty-six million (26.3 million) estimated participants. This popularity can be attributed to the ability to compete with a relatively small number of participants, the limited amount of equipment needed to participate and the limited space requirements necessary (the last of which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game). Interestingly, basketball participation rate increased by almost 10% from 2009 to 2010 (**Figure 9**).

Since 2007, lacrosse and other niche sports, such as rugby, have seen strong growth. Based on survey findings, lacrosse is experiencing continued growth over the past decade (218%) and over the past year ('09-'10), lacrosse has grown 37.7%. From 2007 – 2010 rugby has grown 83.1%. Another noticeable growth was participation in tennis; from 2000-2010 tennis has grown 45.7%.

Traditional youth "powerhouse" sports, including outdoor soccer and baseball, have both experienced declines in participation over the study period; however, the sheer number of participants (14.5 million and 14.0 million, respectively) demands the continued support of these sports.

National Participatory Trends; by Activity - General Sports	2000	2007	2008	2009	2010	% Change '09-10	% Change '08-10	% Change '07-10	% Change '00-10
Baseball	15,848	16,058	15,030	13,837	14,558	5.2%	-3.1%	-9.3%	-8.1%
Basketball	26,215	25,961	26,254	24,007	26,304	9.6%	0.2%	1.3%	0.3%
Cheerleading	2,634	3,279	3,104	3,036	3,232	6.5%	4.1%	-1.4%	**22.7%**
Ice Hockey	2,432	1,840	1,902	2,134	2,145	0.5%	**12.8%**	**16.6%**	-11.8%
Football, Touch	15,456	13,472	10,493	8,959	8,367	-6.6%	-20.3%	-37.9%	-45.9%
Football, Tackle	8,229	7,939	7,692	6,794	6,905	1.6%	-10.2%	-13.0%	-16.1%
Gymnastics	4,876	4,066	3,883	4,021	4,815	**19.7%**	**24.0%**	**18.4%**	-1.3%
Rugby	N/A	617	690	750	1,130	**50.7%**	**63.8%**	**83.1%**	N/A
Lacrosse	518	1,058	1,127	1,197	1,648	**37.7%**	**46.2%**	**55.8%**	**218.1%**
Soccer (Outdoor)	N/A	13,708	14,223	13,691	14,075	2.8%	-1.0%	2.7%	N/A
Soccer (Indoor)	N/A	4,237	4,737	4,913	4,927	0.3%	4.0%	**16.3%**	N/A
Softball (Fast Pitch)	2,693	2,345	2,316	2,636	2,389	-9.4%	3.2%	1.9%	-11.3%
Softball (Slow Pitch)	13,577	9,485	9,835	8,525	8,429	-1.1%	-14.3%	-11.1%	-37.9%
Volleyball (Court)	N/A	6,986	8,190	7,283	7,346	0.9%	-10.3%	5.2%	N/A
Volleyball (Sand/Beach)	5,248	3,878	4,171	4,476	5,028	**12.3%**	**20.5%**	**29.7%**	-4.2%
Racquetball	4,475	4,229	4,993	4,575	4,630	1.2%	-7.3%	9.5%	3.5%
Tennis	12,974	16,940	18,558	18,534	18,903	2.0%	1.9%	**11.6%**	**45.7%**

NOTE: Participation figures are in 000's for the US population ages 6 and over

Figure 9 - National Sport Participatory Trends

Although team sports have slowly declined over the past decade throughout the US, they have seen positive growth in 2010. The growth in youth team sports is now being driven by America's 13 and 14 year olds, who are at the peak ages of sports participation for children. Nearly 70% of children (age 6-17) in the U.S. are playing team sports, and three out of four teenagers are now playing at least one team sport, according to the SGMA annual participation study on team sports – U. S. Trends in Team Sports (2011 edition).

According to the SGMA, five team sports have had strong increases in participation since 2009. They are Beach Volleyball (up 12.3%), Gymnastics (up 19.7%), Field Hockey (up 21.8%), Lacrosse (up 37.7%) and Rugby (50.7%). **Three more traditional mainstream team sports experienced single-digit growth in overall participation: Baseball (up 5.2%), Basketball (up 9.6%), Outdoor Soccer (up 2.8%) and Tackle Football (up 1.6%) across the United States.**

NATIONAL YOUTH TEAM SPORT TRENDS

The following information came from the Sports Marketing Surveys, USA, who is the provider of research and analysis for Sporting Goods Manufacturers Association (SGMA). The following charts depict team sport trends by age segments (**Figure 10-12**).

Ages 6-11	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	3,904	3,657	3,370	3,454	2.5%	-5.6%
Basketball	13+ times	3,455	3,260	3,208	3,328	3.7%	2.1%
Cheerleading	26+ times	530	488	437	496	13.6%	1.6%
Field Hockey	8+ times	80	122	134	74	-44.8%	-39.1%
Football (Tackle)	26+ times	833	797	738	676	-8.4%	-15.1%
Gymnastics	50+ times	561	614	698	852	22.0%	38.8%
Ice Hockey	13+ times	132	137	150	192	27.7%	40.3%
Lacrosse	13+ times	87	105	134	170	26.9%	62.7%
Rugby	8+ times	10	24	30	17	-44.1%	-31.3%
Soccer (Outdoor)	26+ times	2,436	243	2,570	2,686	4.5%	10.6%
Softball (Fast Pitch)	26+ times	173	169	180	235	30.3%	38.8%
Track and Field	26+ times	111	118	163	253	55.4%	114.0%
Volleyball (Court)	13+ times	346	371	439	398	-9.3%	7.3%
Volleyball (Sand)	13+ times	23	27	32	17	-47.6%	-37.7%
Wrestling	26+ times	196	199	218	218	-0.2%	9.6%
Swimming on a Team	50+ times				643		

Figure 10 - Team Sport Trends Ages 6-11 (Source: Sports Marketing Survey, USA)

For children ranging from six to eleven years-old, track and field has grown tremendously over the past four years; within two years, track and field grew 114%. Other noticeable growth trends in team sport participation are lacrosse, ice hockey, gymnastics and softball (fast pitch). Cheerleading has also experienced a strong growth over the past year, increasing by more than 13%.

Field hockey, rugby and volleyball (sand) are experiencing significant declines in participation. Within the last year, all three team sports have declined by more than 40%.

For children ranging from twelve to fourteen years-old, field hockey grew by 74% within a two year period, but slowed down greatly over the past year (1.4%). Other team sports trending strong growth are gymnastics, ice hockey, softball (fast pitch), track and field and volleyball (sand).

Lacrosse, rugby and wrestling are showing a decline in participation. Team sports like baseball, basketball, football (tackle), soccer (outdoor) and volleyball (court) are experiencing slight decline in participation in the past one to two years, but the number of participants are strong and need continual support.

Ages 12-14	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	1,453	1,428	1,577	1,503	-4.7%	5.3%
Basketball	13+ times	3,062	2,930	2,934	2,830	-3.5%	-3.4%
Cheerleading	26+ times	431	459	475	431	-9.2%	-6.1%
Field Hockey	8+ times	93	85	145	147	1.4%	74.0%
Football (Tackle)	26+ times	1,130	1,106	1,138	1,076	-5.5%	-2.8%
Gymnastics	50+ times	270	264	267	295	10.7%	11.7%
Ice Hockey	13+ times	89	95	73	94	29.0%	-1.1%
Lacrosse	13+ times	146	176	211	181	-14.0%	3.1%
Rugby	8+ times	24	17	22	17	-22.7%	0.0%
Soccer (Outdoor)	26+ times	1,244	1,173	1,103	1,085	-1.7%	-7.5%
Softball (Fast Pitch)	26+ times	314	313	256	282	10.2%	-10.1%
Track and Field	26+ times	686	700	740	792	7.0%	13.1%
Volleyball (Court)	13+ times	1,224	1,081	946	855	-9.6%	-20.9%
Volleyball (Sand)	13+ times	135	75	41	62	53.1%	-17.3%
Wrestling	26+ times	290	287	230	196	-14.6%	-31.7%

Figure 11 - Team Sport Trends Ages 12-14 (Source: Sports Marketing Survey, USA)

For children ranging in age from fifteen to eighteen years, lacrosse and ice hockey have shown strong growth trends over the past one to two years, 22.7% and 18.1% respectively. Gymnastics has also shown a strong growth over a two year period (51.8%), but experienced a decrease in participation over the past year.

Noticeable declines in participation are in volleyball (sand) and softball (fast pitch). Volleyball (sand) has declined by more than 50% over a two year period and softball (fast pitch) declined by 25% in a two year period.

Ages 15-18	Frequency	2008	2009	2010	2011	1 year change	2 year change
Baseball	13+ times	1,088	1,085	1,122	1,185	5.6%	9.2%
Basketball	13+ times	2,478	2,495	2,527	2,506	-0.9%	0.4%
Cheerleading	26+ times	488	531	561	485	-13.6%	-8.7%
Field Hockey	8+ times	136	135	111	122	9.5%	-10.0%
Football (Tackle)	26+ times	1,309	1,212	1,165	1,275	9.5%	5.2%
Gymnastics	50+ times	250	198	283	301	6.4%	51.8%
Ice Hockey	13+ times	146	154	144	170	18.1%	10.1%
Lacrosse	13+ times	192	174	176	216	22.7%	24.5%
Rugby	8+ times	33	37	38	57	4.7%	52.7%
Soccer (Outdoor)	26+ times	1,075	1,069	953	861	-9.6%	-19.4%
Softball (Fast Pitch)	26+ times	275	309	277	232	-16.3%	-25.0%
Track and Field	26+ times	1,025	979	944	1,040	10.2%	6.2%
Volleyball (Court)	13+ times	998	868	758	847	11.7%	-2.5%
Volleyball (Sand)	13+ times	998	868	758	398	-47.5%	-54.1%
Wrestling	26+ times	424	368	298	294	-1.2%	-20.1%
Swimming on a Team	50+ times				283		

Figure 12 - Team Sport Trends Ages 15-18 (Source: Sports Marketing Survey, USA)

SPENDING LEVELS

The following chart shows projected spending levels in 2012 for different categories. A majority of team sport participants plan to spend more or the same amount of money in each category.

	Spend More	Spend Same	Spend Less
Team Sports at School	22.8%	64.6%	12.6%
Team Sports Outside of School	21.6%	66.3%	12.4%
Travel for Sports and Rec.	22.5%	64.2%	13.3%
Lessons, Instruction and Camps	24.5%	62.9%	12.6%
Gym Memberships, Fees	20.7%	67.6%	11.7%
Individual Sports Events	23.1%	65.6%	11.3%
Golf Membership, Fees	15.5%	71.4%	13.7%
Tennis Membership, Fees	9.9%	77.2%	12.9%
Winter Sports	17.6%	66.8%	15.6%
Outdoor Recreation	20.7%	70.1%	9.2%
Sports/Rec. Clothing	16.5%	69.2%	14.3%
Sports/Rec. Footwear	16.4%	70.4%	13.2%
Sports/Rec. Equipment	16.0%	66.7%	17.3%

Figure 13 - Projected Spending Levels (Source: Sports Marketing Survey, USA)

The following chart depicts in which sports participants plan to spend more on travel.

	More	Same	Less	No Spending
Rugby	24.4%	51.3%	8.6%	15.7%
Field Hockey	19.6%	52.0%	3.0%	25.3%
Gymnastics	19.4%	39.9%	5.1%	35.6%
Softball (Fast Pitch)	17.7%	42.4%	15.9%	23.9%
Ice Hockey	16.7%	40.6%	10.4%	32.3%
Football (Tackle)	16.7%	41.8%	9.0%	32.5%
Track and Field	15.3%	47.4%	10.9%	26.5%
Baseball	15.0%	43.5%	7.7%	33.8%
Volleyball (Court)	14.7%	43.4%	9.8%	32.1%
Cheerleading	13.9%	39.8%	7.2%	39.1%
Soccer (Indoor)	13.9%	40.0%	10.4%	35.7%
Ultimate Frisbee	12.3%	39.2%	13.7%	34.7%
Soccer (Outdoor)	11.8%	40.7%	8.4%	39.1%
Basketball	11.7%	38.8%	9.4%	40.1%
Volleyball (Sand/Beach)	10.1%	42.0%	11.5%	36.4%
Lacrosse	9.7%	52.0%	11.2%	27.1%
Paintball	9.7%	40.6%	13.7%	36.0%

Figure 14 - Sports Spending Levels (Source: Sports Marketing Survey, USA)

LOCAL TRENDS ANALYSIS

The following sports were further examined to evaluate how Ohio compares to the national trends in each specific sport. This information will help determine size of the market and frequency levels of users. This will help determine the type of facilities that are most needed in a region and the region's participants will travel to these types of facilities for their sports experiences. Ohio is included in the East North Central Region, which includes Wisconsin, Illinois, Indiana and Michigan. **Much of this information does not necessarily apply to Mill Creek MetroParks, but because MetroParks shares resources and information with other city and township park systems, it has application. Many residents suggested in the community input process that MetroParks develop a management agreement with the City of Youngstown to assist the agency in providing these types of services to grow the value of living in Youngstown as an economic strategy for the future.**

SOFTBALL (FAST PITCH)

The following chart depicts the frequency of participation in softball (fast pitch) by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category except for Casual Participants (1-25 times/year).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Fast Pitch Softball Participants (1+ times/year)				
New England	94	3.9%	0.7%	81
Middle Atlantic	310	12.9%	0.8%	96
East North Central	380	15.8%	0.9%	103
West North Central	230	9.6%	1.2%	143
South Atlantic	382	15.9%	0.7%	82
East South Central	216	9.0%	1.3%	150
West South Central	250	10.4%	0.8%	92
Mountain	182	7.6%	0.9%	107
Pacific	357	14.9%	0.8%	95
Casual Fast Pitch Softball Participants (1-25 times/year)				
New England	42	3.4%	0.3%	71
Middle Atlantic	211	17.1%	0.5%	127
East North Central	166	13.4%	0.4%	87
West North Central	139	11.2%	0.7%	168
South Atlantic	188	15.3%	0.3%	78
East South Central	47	3.8%	0.3%	63
West South Central	122	9.9%	0.4%	87
Mountain	109	8.8%	0.5%	124
Pacific	212	17.1%	0.5%	109
Regular Fast Pitch Softball Participants (26-51 times/year)				
New England	52	11.1%	0.4%	231
Middle Atlantic	68	14.4%	0.2%	107
East North Central	84	17.8%	0.2%	115
West North Central	16	3.3%	0.1%	50
South Atlantic	42	9.0%	0.1%	46
East South Central	82	17.5%	0.5%	291
West South Central	19	4.0%	0.1%	36
Mountain	5	1.0%	0.0%	14
Pacific	103	21.9%	0.2%	140
Frequent Fast Pitch Softball Participants (52+ times/year)				
New England	4	0.6%	0.0%	12
Middle Atlantic	48	6.9%	0.1%	51
East North Central	124	17.8%	0.3%	115
West North Central	77	11.0%	0.4%	164
South Atlantic	143	20.6%	0.3%	105
East South Central	75	10.8%	0.4%	179
West South Central	102	14.7%	0.3%	130
Mountain	67	9.7%	0.3%	136
Pacific	56	8.1%	0.1%	52

* Participation figures in thousands (Source SGMA Research)

BASEBALL

The following chart depicts the frequency of participation in Baseball by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category. The region is second in total number of participants who play the game more than 25+ times a year, which is a growing select team sport for this region of the United States.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Baseball Participants (1+ times/year)				
New England	1027	7.1%	7.5%	147
Middle Atlantic	2294	15.8%	6.0%	117
East North Central	2664	18.3%	6.1%	119
West North Central	981	6.4%	4.9%	95
South Atlantic	2351	16.1%	4.2%	83
East South Central	935	6.4%	5.5%	107
West South Central	1163	8.0%	3.6%	71
Mountain	952	6.5%	4.7%	92
Pacific	2248	15.4%	5.0%	98
Casual Baseball Participants (1-12 times/year)				
New England	298	6.1%	2.2%	128
Middle Atlantic	791	16.3%	2.1%	121
East North Central	867	17.9%	2.0%	116
West North Central	327	6.7%	1.7%	101
South Atlantic	796	16.4%	1.4%	84
East South Central	230	4.7%	1.4%	79
West South Central	465	9.6%	1.5%	85
Mountain	297	6.1%	1.5%	86
Pacific	786	16.2%	1.8%	103
Regular Baseball Participants (13-24 times/year)				
New England	114	4.9%	0.8%	102
Middle Atlantic	410	17.7%	1.1%	131
East North Central	602	26.0%	1.4%	169
West North Central	177	7.6%	0.9%	114
South Atlantic	295	12.7%	0.5%	65
East South Central	110	4.7%	0.6%	79
West South Central	102	4.4%	0.3%	39
Mountain	204	8.8%	1.0%	124
Pacific	303	13.1%	0.7%	83
Frequent Baseball Participants (25+ times/year)				
New England	615	8.3%	4.5%	173
Middle Atlantic	1094	14.8%	2.9%	110
East North Central	1188	16.1%	2.7%	104
West North Central	427	5.8%	2.2%	86
South Atlantic	1263	17.1%	2.3%	87
East South Central	595	8.1%	3.5%	134
West South Central	595	8.1%	1.9%	71
Mountain	452	6.1%	2.2%	86
Pacific	1159	15.7%	2.6%	100
* Participation figures in thousands (Source SGMA Research)				

SOCCER (OUTDOOR)

The following chart depicts the frequency of participation in Soccer (Outdoor) by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category except for frequent participants (52+ times/year).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Soccer (Outdoor) Participants (1+ times/year)				
New England	615	4.4%	4.5%	91
Middle Atlantic	1956	13.9%	5.1%	103
East North Central	352	16.7%	5.4%	109
West North Central	793	5.6%	4.2%	84
South Atlantic	2540	18.0%	4.6%	93
East South Central	680	4.8%	4.0%	81
West South Central	1444	10.3%	4.5%	91
Mountain	1043	7.4%	5.2%	104
Pacific	2653	18.8%	6.0%	120
Casual Soccer (Outdoor) Participants (1-25 times/year)				
New England	366	4.9%	2.7%	102
Middle Atlantic	1103	14.7%	2.9%	109
East North Central	1337	17.9%	3.1%	116
West North Central	458	6.1%	2.4%	91
South Atlantic	1313	17.5%	2.4%	90
East South Central	434	5.8%	2.5%	97
West South Central	716	9.6%	2.2%	85
Mountain	638	8.5%	3.2%	120
Pacific	1122	15.0%	2.5%	95
Regular Soccer (Outdoor) Participants (26-51 times/year)				
New England	126	3.6%	0.9%	74
Middle Atlantic	412	11.6%	1.1%	86
East North Central	699	19.7%	1.6%	128
West North Central	162	4.6%	0.9%	68
South Atlantic	599	16.9%	1.1%	87
East South Central	147	4.1%	0.9%	69
West South Central	356	10.0%	1.1%	89
Mountain	255	7.2%	1.3%	101
Pacific	788	22.2%	1.8%	142
Frequent Soccer (Outdoor) Participants (52 times/year)				
New England	123	4.0%	0.9%	84
Middle Atlantic	441	14.5%	1.2%	107
East North Central	316	10.4%	0.7%	67
West North Central	173	5.7%	0.9%	85
South Atlantic	628	20.6%	1.1%	106
East South Central	98	3.2%	0.6%	54
West South Central	372	12.2%	1.2%	108
Mountain	150	4.9%	0.7%	69
Pacific	742	24.4%	1.7%	155
* Participation figures in thousands (Source SGMA Research)				

CHEERLEADING

The following chart depicts the frequency of participation in cheerleading by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category, which demonstrates a strong number of participants that play casual team and competitive type of cheerleading.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Cheerleading Participants (1+ times/year)				
New England	78	2.4%	0.6%	50
Middle Atlantic	549	17.0%	1.4%	126
East North Central	569	17.6%	1.3%	114
West North Central	173	5.4%	0.9%	80
South Atlantic	728	22.5%	1.3%	116
East South Central	254	7.9%	1.5%	131
West South Central	366	11.3%	1.1%	100
Mountain	200	6.2%	1.0%	87
Pacific	316	9.8%	0.7%	62
Casual Cheerleading Participants (1-25 times/year)				
New England	41	2.5%	0.3%	51
Middle Atlantic	260	15.6%	0.7%	116
East North Central	293	17.6%	0.7%	114
West North Central	109	6.6%	0.6%	98
South Atlantic	358	21.5%	0.6%	110
East South Central	116	7.0%	70.0%	116
West South Central	180	10.8%	0.6%	96
Mountain	104	6.3%	0.5%	88
Pacific	203	12.2%	0.5%	78
Regular Cheerleading Participants (26-51 times/year)				
New England	16	2.8%	0.1%	57
Middle Atlantic	115	19.8%	0.3%	147
East North Central	93	16.0%	0.2%	104
West North Central	13	2.2%	0.1%	33
South Atlantic	109	18.8%	0.2%	96
East South Central	35	6.0%	0.2%	100
West South Central	89	15.3%	0.3%	136
Mountain	39	6.7%	0.2%	95
Pacific	71	12.2%	0.2%	78
Frequent Cheerleading Participants (52+ times/year)				
New England	21	2.1%	0.2%	44
Middle Atlantic	174	17.6%	0.5%	131
East North Central	183	18.5%	0.4%	120
West North Central	52	5.3%	0.3%	79
South Atlantic	261	26.4%	0.5%	136
East South Central	102	10.3%	0.6%	172
West South Central	96	9.7%	0.3%	86
Mountain	57	5.8%	0.3%	81
Pacific	42	4.3%	0.1%	27
* Participation figures in thousands (Source SGMA Research)				

FOOTBALL (FLAG)

The following chart depicts the frequency of participation in football (flag) by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred-would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is below the national average in every category except for regular participants (13-24 times/year).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Football (Flag) Participants (1+ times/year)				
New England	226	3.3%	1.7%	70
Middle Atlantic	821	12.1%	2.1%	90
East North Central	959	14.2%	2.2%	**92**
West North Central	400	5.9%	2.1%	88
South Atlantic	1410	20.8%	2.5%	107
East South Central	347	5.1%	2.0%	85
West South Central	914	13.5%	2.9%	120
Mountain	620	9.2%	3.1%	129
Pacific	1071	15.8%	2.4%	101
Casual Football (Flag) Participants (1-12 times/year)				
New England	171	4.6%	1.3%	96
Middle Atlantic	439	11.9%	1.1%	88
East North Central	510	13.8%	1.2%	**90**
West North Central	255	6.9%	1.3%	103
South Atlantic	753	20.4%	1.4%	105
East South Central	202	5.5%	1.2%	91
West South Central	521	14.1%	1.6%	125
Mountain	313	8.5%	1.6%	119
Pacific	530	14.3%	1.2%	91
Regular Football (Flag) Participants (13-24 times/year)				
New England	41	3.3%	0.3%	70
Middle Atlantic	159	13.0%	40.0%	96
East North Central	208	17.0%	50.0%	**110**
West North Central	88	7.2%	0.5%	107
South Atlantic	274	22.3%	0.5%	115
East South Central	56	4.6%	0.3%	76
West South Central	80	6.5%	0.2%	58
Mountain	137	11.2%	0.7%	157
Pacific	183	14.9%	0.4%	95
Frequent Football (Flag) Participants (25+ times/year)				
New England	13	0.7%	0.1%	15
Middle Atlantic	223	12.1%	0.6%	89
East North Central	241	13.1%	0.6%	**85**
West North Central	57	3.1%	0.3%	46
South Atlantic	383	20.7%	0.7%	106
East South Central	89	4.8%	0.5%	80
West South Central	313	17.0%	1.0%	150
Mountain	169	9.2%	0.8%	129
Pacific	358	19.4%	0.8%	124
* Participation figures in thousands (Source SGMA Research)				

LACROSSE

The following chart depicts the frequency of participation in Lacrosse by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is below the national average in every category. This could be low because of a lack of venues available in the region or a lack of focus from sports organizers to market and promote the sport. In any case, the sport is growing in popularity for both men and women.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Lacrosse Participants (1+ times/year)				
New England	87	5.8%	0.6%	121
Middle Atlantic	558	37.2%	1.4%	275
East North Central	135	9.0%	0.3%	**59**
West North Central	35	2.4%	0.2%	35
South Atlantic	317	21.1%	0.6%	108
East South Central	47	3.1%	0.3%	52
West South Central	34	2.3%	0.1%	20
Mountain	114	7.6%	0.6%	107
Pacific	173	11.5%	0.4%	73
Casual Lacrosse Participants (1-12 times/year)				
New England	48	6.9%	0.4%	143
Middle Atlantic	196	27.9%	0.5%	207
East North Central	52	7.4%	0.1%	**48**
West North Central	26	3.7%	0.1%	56
South Atlantic	156	22.2%	0.3%	114
East South Central	7	1.0%	0.0%	17
West South Central	26	3.7%	0.1%	32
Mountain	74	10.5%	0.4%	148
Pacific	117	16.7%	0.3%	106
Regular Lacrosse Participants (13-24 times/year)				
New England	0	0.0%	0.0%	0
Middle Atlantic	106	71.9%	0.3%	532
East North Central	16	10.6%	0.0%	**69**
West North Central	7	5.0%	0.0%	75
South Atlantic	18	12.5%	0.0%	64
East South Central	0	0.0%	0.0%	0
West South Central	0	0.0%	0.0%	0
Mountain	0	0.0%	0.0%	0
Pacific	0	0.0%	0.0%	0
Frequent Lacrosse Participants (25+ times/year)				
New England	36	5.6%	0.3%	116
Middle Atlantic	271	41.5%	0.7%	308
East North Central	68	10.5%	0.2%	**68**
West North Central	3	0.4%	0.0%	7
South Atlantic	140	21.4%	0.3%	110
East South Central	38	5.8%	0.2%	97
West South Central	8	1.2%	0.0%	10
Mountain	38	5.8%	0.2%	81
Pacific	51	7.8%	0.1%	50

* Participation figures in thousands (Source SGMA Research)

RUGBY

The following chart depicts the frequency of participation in rugby by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is below the national average in every category except for Regular Participants (8-14 times/year), which indicates it is a growing sport at 25,000 in the East North Central area.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Rugby Participants (1+ times/year)				
New England	52	6.1%	0.4%	127
Middle Atlantic	197	23.2%	0.5%	172
East North Central	98	11.6%	0.2%	**75**
West North Central	40	4.7%	0.2%	70
South Atlantic	140	16.5%	0.3%	84
East South Central	20	2.4%	0.1%	39
West South Central	51	6.0%	0.2%	53
Mountain	56	6.6%	0.3%	93
Pacific	196	23.0%	0.4%	147
Casual Rugby Participants (1-7 times/year)				
New England	46	8.4%	0.3%	176
Middle Atlantic	176	32.4%	0.5%	240
East North Central	61	11.3%	0.1%	**73**
West North Central	12	2.3%	0.1%	34
South Atlantic	31	5.7%	0.1%	29
East South Central	9	1.7%	0.1%	28
West South Central	38	7.0%	0.1%	62
Mountain	48	8.8%	0.2%	124
Pacific	122	22.5%	0.3%	143
Regular Rugby Participants (8-14 times/year)				
New England	0	0.0%	0.0%	0
Middle Atlantic	15	19.2%	0.0%	142
East North Central	25	31.3%	0.1%	**203**
West North Central	0	0.0%	0.0%	0
South Atlantic	10	12.0%	0.0%	61
East South Central	0	0.0%	0.0%	0
West South Central	8	10.1%	0.0%	89
Mountain	0	6.6%	0.0%	93
Pacific	17	20.9%	0.0%	133
Frequent Rugby Participants (15+ times/year)				
New England	10	4.2%	0.1%	88
Middle Atlantic	14	6.0%	0.0%	45
East North Central	6	2.4%	0.0%	**16**
West North Central	27	12.0%	0.1%	180
South Atlantic	93	41.1%	0.2%	211
East South Central	11	5.0%	0.1%	83
West South Central	4	1.9%	0.0%	17
Mountain	5	2.1%	0.0%	29
Pacific	57	25.2%	0.1%	161
* Participation figures in thousands (Source SGMA Research)				

BASKETBALL

The following chart depicts the frequency of participation in basketball by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category, which demonstrates a strong number of participants that play casual team and tournament types of basketball.**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Basketball Participants (1+ times/year)				
New England	1307	5.0%	9.6%	104
Middle Atlantic	3271	12.4%	8.5%	92
East North Central	4669	17.8%	10.7%	**115**
West North Central	1454	5.5%	7.6%	83
South Atlantic	4870	18.5%	8.8%	95
East South Central	1695	6.4%	10.0%	107
West South Central	2860	10.9%	8.9%	96
Mountain	2126	8.1%	10.6%	114
Pacific	4052	15.4%	9.1%	98
Casual Basketball Participants (1-12 times/year)				
New England	385	4.5%	2.8%	93
Middle Atlantic	1328	15.4%	3.5%	114
East North Central	1507	17.5%	3.4%	**113**
West North Central	447	5.2%	2.4%	77
South Atlantic	1616	18.7%	2.9%	96
East South Central	572	6.6%	3.4%	110
West South Central	831	9.6%	2.6%	85
Mountain	605	7.0%	3.0%	99
Pacific	1338	15.5%	3.0%	99
Regular Basketball Participants (13-24 times/year)				
New England	208	5.2%	1.5%	108
Middle Atlantic	549	13.6%	1.4%	101
East North Central	773	19.2%	1.8%	**125**
West North Central	304	7.5%	1.6%	113
South Atlantic	590	14.6%	1.1%	75
East South Central	215	5.3%	1.3%	89
West South Central	416	10.3%	1.3%	91
Mountain	323	8.0%	1.6%	113
Pacific	653	16.2%	1.5%	103
Frequent Basketball Participants (25+ times/year)				
New England	714	5.2%	5.2%	109
Middle Atlantic	1394	10.2%	3.6%	76
East North Central	2389	17.5%	5.5%	**114**
West North Central	703	5.2%	3.7%	77
South Atlantic	2665	19.5%	4.8%	101
East South Central	908	6.7%	5.3%	111
West South Central	1613	11.8%	5.0%	105
Mountain	1199	8.8%	6.0%	124
Pacific	2062	15.1%	4.6%	96
* Participation figures in thousands (Source SGMA Research)				

VOLLEYBALL (COURT)

The following chart depicts the frequency of participation in volleyball (court) by region. The last column (Index vs. Total Population) represents how each region is compared to the national level of participation. Numbers below one hundred would represent a lower than average participation rate, and numbers above one hundred would represent higher than average participation rate. **The East North Central Region is above the national average in every category which demonstrates a strong number of participants over 608,000 that play team and tournament type of volleyball (court).**

	Total # of Part. (000s)	Segment %	Participation Rate by Group	Index vs. Total Population
Total Volleyball (Court) Participants (1+ times/year)				
New England	211	2.9%	1.5%	60
Middle Atlantic	1128	15.4%	2.9%	114
East North Central	1439	19.6%	3.3%	**127**
West North Central	545	7.4%	2.9%	111
South Atlantic	1010	13.7%	1.8%	71
East South Central	330	4.5%	1.9%	75
West South Central	859	11.7%	2.7%	103
Mountain	26	9.9%	3.6%	139
Pacific	1099	15.0%	2.5%	95
Casual Volleyball (Court) Participants (1-12 times/year)				
New England	120	3.7%	0.9%	78
Middle Atlantic	566	17.6%	1.5%	130
East North Central	656	20.3%	1.5%	**132**
West North Central	189	5.9%	1.0%	88
South Atlantic	492	15.3%	0.9%	78
East South Central	92	2.9%	0.5%	48
West South Central	308	9.6%	1.0%	85
Mountain	375	11.6%	1.9%	164
Pacific	426	13.2%	1.0%	84
Regular Volleyball (Court) Participants (13-24 times/year)				
New England	40	3.5%	0.3%	74
Middle Atlantic	181	16.0%	0.5%	119
East North Central	175	15.5%	0.4%	**101**
West North Central	71	6.3%	0.4%	94
South Atlantic	98	8.7%	0.2%	45
East South Central	67	5.9%	0.4%	99
West South Central	205	18.2%	0.6%	161
Mountain	129	11.4%	0.6%	161
Pacific	162	14.3%	0.4%	91
Frequent Volleyball (Court) Participants (25+ times/year)				
New England	50	1.7%	0.4%	35
Middle Atlantic	380	12.7%	1.0%	94
East North Central	608	20.3%	1.4%	**132**
West North Central	285	9.5%	1.5%	142
South Atlantic	421	14.1%	0.8%	72
East South Central	170	5.7%	1.0%	95
West South Central	346	11.6%	1.1%	102
Mountain	222	7.4%	1.1%	104
Pacific	511	17.1%	1.1%	109
* Participation figures in thousands (Source SGMA Research)				

FUNDING AND REVENUE STRATEGIES

Funding strategies to help the MetroParks support operational and capital costs are outlined in this section. The Consultant Team has identified numerous funding opportunities that can be applied to the Strategic Master Plan based on the community values.

REVENUE AND FUNDING OPTIONS TO CONSIDER FOR GREENWAYS AND TRAILS FOR MILL CREEK METROPARKS

The greenway funding opportunities cited below are applicable to organizations and agencies throughout the US that are seeking funding, including Mill Creek MetroParks. The most common method for funding greenways is to combine local, public sector and private sector funds with funds from state, federal and additional private-sector sources. Many communities involved with greenway implementation are choosing to leverage local money as a match for outside funding sources, in essence multiplying their resources.

Local advocates and MetroParks staff should pursue a variety of funding sources for land acquisition and greenway construction, as well as funding opportunities for operations and maintenance costs. A greenway program that relies on limited funding sources could one day come to a grinding halt should these sources dry up. The following list of sources is divided into:

LOCAL AND STATE FUNDING SOURCES

Sales Tax: Great Rivers Greenways District has gained the support of voters via the 1/8 sales tax for greenway development of which ½ of the funding is dedicated to local municipalities and counties in the St. Louis market area. This is a model funding component for the nation.

Land Leases: Many communities across the United States have allowed land leases for commercial retail operations along trails as a source of funding. The communities that have used land lease look for retail operations that support the needs of recreation users of the trails. This includes coffee shops, grill and food concessions and small restaurants, ice cream shops, bicycle shops, farmers markets and small local business.

Use of TIF Funds: Some cities and counties have used TIF funds to help redevelop developed neighborhoods and business areas via a greenway development. In the City of Valparaiso, Indiana, they have financed several trail linkages using TIF monies.

Sale of Development Rights below the Ground: Some public agencies have sold their development rights next to greenways below ground for fiber optic lines and utility lines for gas and electric on a lineal foot basis. This has occurred in King County, Washington.

Special Recognition License Tag: In Indianapolis, the Greenways Foundation has a special Greenways designation car tag that provides income to the Greenways Foundation to provide matching grant monies for the City of Indianapolis greenways program. The tag provides $45 dollars to the foundation per tag sold each year.

Greenway Foundations: Greenway Foundations have been developing across the United States over the last fifteen years to support greenway matching monies for cities and counties. Greenway Foundations raise money for capital monies and operational money.

Floodway Funding Sources: Many cities and counties have used floodway funding sources to support development and operations of greenways. This funding source is used extensively in Houston, Texas and in Cleveland, Ohio.

Bond Referendums for Greenways: Communities across the nation have successfully placed on local ballots propositions to support greenway development. The Charlotte-Mecklenburg County, North Carolina area passed four consecutive referendums that generated more than $3 million for greenways. Guilford County, North Carolina passed a referendum in 1986 that appropriated $1.6 million for development of a specific greenway corridor. In Cheyenne, Wyoming, a greenway bond referendum was used to fund the first three miles of local greenways. Residents throughout the United States have consistently placed a high value on local greenway development and voted to raise their own taxes in support of greenway implementation.

Greenway Funding through Local Capital Improvement Plans: Perhaps the true measure of local government commitment to greenways is a yearly appropriation for trail development in the Capital Improvements Program. In Raleigh, North Carolina, greenways continue to be built and maintained, year after year, due to a dedicated source of annual funding (administered through the Parks and Recreation Department). In addition, the City of Raleigh's Real Estate Department has its own line item budget for greenway land acquisition.

Greenway Trust Fund: Another strategy used by several communities is the creation of a trust fund for land acquisition and facility development that is administered by a private greenway advocacy group or by a local greenway commission. A trust fund can aid in the acquisition of large parcels of high-priority properties that may be lost if not acquired by private sector initiative. Money may be contributed to the trust fund from a variety of sources, including the municipal and county general funds, private grants and gifts.

Greenway Fundraising Programs: Agencies across the United States have used greenways for non-profit fundraisers in the form of walks, runs, bicycle races and other special events. The local managing agency usually gets $2-5 dollars per participant who participates in the events to go back in support of the operations and maintenance costs.

Greenways Conservation Groups: Conservation groups adopt green corridors to support the operations and capital costs for specific greenways corridors. These groups raise needed money for designated greenways for capital and operations costs.

Local Private-Sector Funding: Local industries and private businesses may agree to provide support for greenway development through one or more of the following methods:

- Donations of cash to a specific greenway segment
- Donations of services by large corporations to reduce the cost of greenway implementation, including equipment and labor, to construct and install elements of a specific greenway
- Reductions in the cost of materials purchased from local businesses that support greenway implementation and supply essential products for facility development

One example of a successful endeavor of this type is the Swift Creek Recycled Greenway in Cary, North Carolina. A total of $40,000 in donated construction materials and labor made this trail an award-winning demonstration project. This method of raising funds requires a great deal of staff coordination. (Note: Some materials used in the "recycled trail" were considered waste materials by local industries!)

Adopt-A-Trail Programs: These are typically small grant programs that fund new construction, repair/renovation, maps, trail brochures, facilities (bike racks, picnic areas, birding equipment), as well as provide maintenance support. Adopt–A-Trail program is similar to Adopt-A-Mile of highway program. Adopt-A-Trail programs can also be in the form of cash contributions that typically include a range of $12,000 to $16,000 a mile to cover the total operational costs.

State Departments of Transportation: Many states are the local administrators of federal funding from the Transportation Equity Act for the 21st Century (TEA-21) – see more info below, under Federal Funding Sources.

Community Development Block Grants: Through its State CDBG Program, the U.S. Department of Housing and Urban Development (HUD) provides States with annual direct grants, which they in turn award to smaller communities and rural areas for use in revitalizing neighborhoods, expanding affordable housing and economic opportunities and/or improving community facilities and services. See more info and link below, under Federal Funding Sources.

Safe-Routes to Schools Program: The federal government provides safe-routes to school funding for greenways to promote youth walking to school. Grants are 100% federally funded.

State Water Management Funds: Funds established to protect or improve water quality could apply to a greenways/trails project if a strong link exists between the development of a greenway and the adjacent/nearby water quality. Possible uses of these funds include: purchase critical strips of land along rivers and streams for protection, which could then also be used for greenways, development of educational materials, displays or storm water management.

VOLUNTEER ASSISTANCE AND SMALL-SCALE DONATION PROGRAMS

Greenway Sponsors: A sponsorship program for greenway amenities allows for smaller donations to be received both from individuals and businesses. The program must be well-planned and organized, with design standards and associated costs established for each amenity. Project elements that may be funded can include mile markers, call boxes, benches, trash receptacles, entry signage and bollards, and picnic areas.

Volunteer Work: Community volunteers may help with greenway construction, as well as conduct fundraisers. Organizations which might be mobilized for volunteer work include the Boy Scouts and Girl Scouts, the Sierra Club, biking and trail clubs, birding clubs and local civic clubs.

A point in case is the volunteer greenway program in Cheyenne, Wyoming. The Greater Cheyenne Greenway has motivated an impressive amount of community support and volunteer work. The program has the unusual problem of having to insist that volunteers wait to begin landscaping the trail until construction was completed. A manual for greenway volunteers was developed in 1994 to guide and regulate volunteer work. The manual includes a description of appropriate volunteer efforts, request forms, waiver and release forms and a completion form (volunteers are asked to summarize their accomplishments). Written guidelines are also provided for volunteer work in 100-year floodplains.

To better organize volunteer activity, Cheyenne developed an “Adopt-a-Spot” program. Participants who adopt a segment of trail are responsible for periodic trash pick-up, but can also install landscaping, prune trailside vegetation, develop wildlife enhancement projects and install site amenities. All improvements must be consistent with the greenway development plan and must be approved by the local greenway coordinator. Adopt-a-Spot volunteers are allowed to display their names on a small sign along the adopted section of greenway.

Volunteers included the Boy Scouts of America and Cheyenne's Job Training Partnership Program became involved in building trailside benches and picnic tables. School groups raised funds to build trail amenities. Other volunteers participated in a stream bank improvement project by donating labor and materials.

Estate Donations: Wills, estates and trusts may be also dedicated to the appropriate agency for use in developing and/or operating the greenway system.

"Buy-a-Foot" Programs: "Buy-a-Foot" programs have been successful in raising funds and awareness for trail and greenway projects within North Carolina and other States. Under local initiatives, citizens are encouraged to purchase one linear foot of the greenway by donating the cost of construction. An excellent example of a successful endeavor is the High Point Greenway "Buy-a-Foot" campaign, in which linear greenway "feet" were sold at a cost of $25/ foot. Those who donated were given a greenway t-shirt and certificate. The efforts project provided over $50,000 in funds.

FEDERAL GOVERNMENT FUNDING SOURCES

Some Federal programs offer financial aid for projects that aim to improve community infrastructure, transportation and housing and recreation programs. Some of the Federal programs that can be used to support the development of greenway systems include:

The Transportation Equity Act for the 21st Century (TEA-21): The primary source of federal funding for greenways is through the Transportation Equity Act for the 21st Century (TEA-21). There are many sections of the Act that support the development of bicycle and pedestrian transportation corridors. Those sections that apply to the creation of greenway systems include:

Section 1302 – Simms National Recreational Trails Fund Act (NRTFA): A component of TEA-21, the NRTFA is a funding source that assists with the development of non-motorized and motorized trails. In fiscal year 1994, Congress did not fund this national program, and it has become apparent that this funding source is not as stable as the national trail community once envisioned it. In 1993, Congress appropriated only $7.5 million of a $30 million apportionment. The Act uses funds paid into the Highway Trust Fund from fees on non-highway recreation fuel used by off-road vehicles and camping equipment.

Motorized and non-motorized trail projects receive a 30% share of annual appropriations. 40% of the appropriation must be spent on projects that accommodate both user groups. States can grant funds to private and public sector organizations. NRTFA projects are one 100% federally funded during the first three years of the program. Grant recipients must provide a 20% match.

Section 1047 – National Scenic Byways Program: This component of TEA-21 is designed to protect and enhance America's designated scenic roads. Money is available for planning, safety and facility improvements, cultural and historic resource protection, as well as tourism information signage. Bicycle and pedestrian facilities can be developed in conjunction with scenic roadway projects. Some states with Scenic Byway Programs have developed greenways in conjunction with this initiative.

Section 1008 – Congestion Mitigation and Air Quality Improvement (CMAQ) Program: The CMAQ program was created to reduce congestion on local streets and improve air quality. Funds are available to urban communities designated as “non- attainment” areas for air quality, meaning the air is more polluted than federal standards allow. A grant recipient must demonstrate that its project will improve air quality throughout the community. Funding requires a 20% local match.

Community Development Block Grant Program (CDBG): The U.S. Department of Housing and Urban Development (HUD) offers financial grants to communities for neighborhood revitalization, economic development and improvements to community facilities and services, especially in low and moderate-income areas. Several communities have used HUD funds to develop greenways, including the Boscobel Heights’ “Safe Walk” Greenway in Nashville, Tennessee.

Land and Water Conservation Fund (LWCF) Grants: This Federal funding source was established in 1965 to provide “close-to-home” park and recreation opportunities to residents throughout the United States. Money for the fund comes from the sale or lease of nonrenewable resources, primarily federal offshore oil and gas leases and surplus federal land sales. LWCF grants can be used by communities to build a variety of parks and recreation facilities, including trails and greenways.

LWCF funds are distributed by the National Park Service to the states annually. Communities must match LWCF grants with 50% of the local project costs through in-kind services or cash. All projects funded by LWCF grants must be used exclusively for recreation purposes, in perpetuity.

Conservation Reserve Program: The U.S. Department of Agriculture (USDA), through its Agricultural Stabilization and Conservation Service, provides payments to farm owners and operators to place highly erodible or environmentally sensitive landscapes into a ten to fifteen year conservation contract. The participant, in return for annual payments during this period, agrees to implement a conservation plan approved by the local conservation district for converting sensitive lands to less intensive uses. Individuals, associations, corporations, estates, trusts, cities, counties and other entities are eligible for this program. Funds from this program can be used to fund the maintenance of open space and non-public-use greenways, along bodies of water and ridgelines.

Wetlands Reserve Program: The U.S. Department of Agriculture provides direct payments to private landowners who agree to place sensitive wetlands under permanent easements. This program can be used to fund the protection of open space and greenways within riparian corridors.

Watershed Protection and Flood Prevention (Small Watersheds) Grants: The USDA Natural Resource Conservation Service (NRCS) provides funding to state and local agencies or nonprofit organizations authorized to carry out, maintain and operate watershed improvements involving less than 250,000 acres. The NRCS provides financial and technical assistance to eligible projects to improve watershed protection, flood prevention, sedimentation control, public water-based fish and wildlife enhancements and recreation planning. The NRCS requires a 50% local match for public recreation, as well as fish and wildlife projects.

Urban and Community Forestry Assistance Program: The USDA provides small grants of up to $10,000 to communities for the purchase of trees to plant along city streets and for greenways and parks. To qualify for this program, a community must pledge to develop a street-tree inventory, a municipal tree ordinance, a tree commission, committee or department and an urban forestry-management plan.

Small Business Tree-Planting Program: The Small Business Administration provides small grants of up to $10,000 to purchase trees for planting along streets and within parks or greenways. Grants are used to develop contracts with local businesses for the plantings.

Economic Development Grants for Public Works and Development of Facilities: The U.S. Department of Commerce, Economic Development Administration (EDA), provides grants to states, counties and cities designated as redevelopment areas by the EDA for public works projects that can include developing trails and greenway facilities. There is a 30% local match required, except in severely distressed areas where federal contribution can reach 80%.

National Recreational Trails Program: These grants are available to government and non-profit agencies for amounts ranging from $5,000 to $50,000 for the building of a trail or piece of a trail. It is a reimbursement grant program (sponsor must fund 100% of the project up front) and requires a 20% local match. This is an annual program that has an application deadline at the end of January. The available funds are split such that 30% is allocated to motorized trails, 30% to non-motorized trails and the remaining 40% is discretionary for trail construction.

Design Arts Program: The National Endowment for the Arts provides grants to states and local agencies, individuals and nonprofit organizations for projects that incorporate urban design, historic preservation, planning, architecture, landscape architecture and other community improvement activities, including greenway development. Grants to organizations and agencies must be matched by a 50% local contribution. Agencies can receive up to $50,000.

GRANTS THROUGH PRIVATE FOUNDATIONS AND CORPORATIONS

Many communities have solicited greenway funding from a variety of private foundations and other conservation-minded benefactors. Some of these grants include:

American Greenways Eastman Kodak Awards: The Conservation Fund's American Greenways Program has teamed with the Eastman Kodak Corporation and the National Geographic Society to award small grants ($250 to $2000) to encourage the planning, design and development of greenways.

REI Environmental Grants: Recreational Equipment Incorporated awards grants to nonprofit organizations interested in protecting and enhancing natural resources for outdoor recreation. The company calls on its employees to nominate organizations for these grants, ranging from $500 to $8,000, which can be used for the following:

- Protect lands and waterways and make these resources accessible to more people
- Better utilize or preserve natural resources for recreation
- Increase access to outdoor activities
- Encourage involvement in muscle-powered recreation
- Promote safe participation in outdoor muscle-powered recreation and proper care for outdoor resources

Coors Pure Water 2000 Grants: Coors Brewing Company and its affiliated distributors provide funding and in-kind services to grassroots organizations that are working to solve local, regional and national water-related problems. Coors provides grants, ranging from a few hundred dollars to $50,000, for projects such as river cleanups, aquatic habitat improvements, water quality monitoring, wetlands protection, pollution prevention, water education efforts, groundwater protection, water conservation and fisheries.

World Wildlife Fund Innovative Grants Program: This organization awards small grants to local, regional and statewide nonprofit organizations to help implement innovative strategies for the conservation of natural resources. Grants are offered to support projects that accomplish one or more of the following: conserve wetlands, protect endangered species, preserve migratory birds, conserve coastal resources and/or establish and sustain protected natural areas, such as greenways.

Innovative grants can help pay for the administrative costs for projects including planning, technical assistance, legal and other costs to facilitate the acquisition of critical lands, retaining consultants and other experts, as well as preparing visual presentations and brochures or other conservation activities. The maximum award for a single grant is $10,000.

Bikes Belong: Bikes Belong Coalition is sponsored by members of the American Bicycle Industry. The grant program is a national discretionary program with a small budget to help communities build TEA-21-funded projects. They like to fund high-profile projects and are in support of regional coalitions. An application must be supported by the local bicycle dealers (letters of support should be attached). Bikes Belong also offers advice and information on how to get more people on bikes. Government and non-profit agencies are eligible and no match is required. The maximum amount for a grant proposal is $10,000. Applications may be submitted at any time and are reviewed as they are received.

Steelcase Foundation: Steelcase Foundation grants are restricted to locally sponsored projects in areas where there are Steelcase Inc. manufacturing plants. In general, Steelcase does not wish to be the sole funder supporting a program. Also, grants are only awarded to non-profit organizations. It does support educational and environmental projects and is particularly interested in helping the disadvantaged, disabled, young and elderly improve the quality of their lives. Applications may be submitted anytime and are considered by the Trustees four times a year.

Walmart Foundation: This foundation supports local community and environmental activities, as well as educational programs for children (among other things). An organization needs to work with the local store manager to discuss application. Walmart Foundation only funds 501(c)3 organizations.

PARK AND RECREATION FUNDING SOURCES TO FUND OPERATIONAL AND CAPITAL COSTS

The following funding sources can provide revenue opportunities for the MetroParks, but it will take a dedicated staff person to investigate and pursue the source and manage for the future. The following are funding sources that can be developed for-Mill Creek MetroParks:

Redevelopment Money: Redevelopment money from the County or the State to promote economic development in the area. Redevelopment agencies are typically located as part of cities and counties in most states.

Dedicated Sales Tax: A dedicated sales tax of $0.01 on food and beverages sold in the City/County is to be dedicated to the trails or a park system as a whole. This funding source is successfully used in Ohio and Indiana.

Bed Tax (transient occupancy tax): Bed Tax, or transient occupancy tax, is money from hotels and motels in the County who would directly benefit from the attractions or special events held at the county park sites. Counties usually manage this funding source, which would require Mahoning County to support the funding source. This could be 1-2% percent added to the existing bed tax to support the development of a specific facility or park.

CDBG Money: This source can be used for a park site. Mill Creek MetroParks does qualify for this funding source.

Local, Regional or National Foundations: Many communities have turned to local, regional and national foundations in their area to support the development of an element of the park system, such as Fellows Riverside Gardens.

Park District Bond Issue: This would require local residents to vote on a bond issue to develop or enhance existing and new parks from property tax or sales tax commitments by residents.

Lease Back Option: The agency would enter into a lease back option with a private finance company to provide the financing for the project. The agency, along with their partners, would agree to pay the development costs back over a thirty year period from the revenues earned from the site or from general fund dollars dedicated to the project.

Partnership Development Agreement: Each partner would develop their respective facilities based on set design guidelines with the MetroParks managing all the site elements. Partners would work collaboratively to promote the site as a whole versus individual amenities. This process was successful for Papago Park, located in the City of Phoenix, Arizona. The site included a Major League Spring Training facility, Minor League Baseball Complex, Zoo, Botanical Gardens, History Museum and other attractions on site.

Naming Rights: Private fundraising could be developed to fund a portion or the entirety of it through naming rights for the site and individual amenity naming rights. Naming rights are calculated by the number of impression points by visitors to the site. A park could raise 20%-30% of the development costs from naming rights. Individual naming rights could support the development of sports fields, a dog park, skate park, ice rink, BMX track, winter sports area, children's play area, hockey rink and golf course.

Grants: Grants have always been a good source for funding for parks throughout the United States. Grants can be provided by the Federal Government, such as the land and conservation fund, transportation enhancement funds for trails and greenways, state grant funds from gambling taxes or alcohol funds and local grants from community foundations. Research for funding included, but is not limited to: Federal/State Grants, Foundation Sources and Corporate Grants for areas of support and fields of interest listed below:

Community Forest and Open Space Program: Federal Grant with Estimated Total Program Funding of $3,150,000. Individual grant applications may not exceed $400,000. The program pays up to 50% of the project costs and requires a 50% non-federal match. Eligible lands for grants funded under this program are private forests that are at least five acres in size, suitable to sustain natural vegetation and are at least 75% forested.

Land and Water Conservation Fund: The funds are to be utilized in the preservation, development and renovation of outdoor recreation facilities, with a focus on America's Great Outdoors Initiative. Land and Water Conservation funds may be used to create new pavilions or renovate existing structures, playgrounds or play areas, ball fields, bleachers, golf course meeting rooms, multi-purpose courts, parking facilities, pathways and trails, roads, signs, ski areas, snowmobile facilities and tennis courts. Federal Funds awarded, on average, $70,000.

Congestion Mitigation and Air Quality Program-fund: This source is for transportation projects that improve air quality and reduce traffic congestion. Projects can include bicycle and pedestrian projects, trails, links to communities and/or bike rack facilities. Average grant awarded ranges from $50,000 to $100,000.

Community Facilities Grant and Loan Program-Grant program: This source is established to assist communities with grant and loan funding for the expansion, renovation and/or remodeling of former school facilities and/or existing surplus government facilities that have a current or future community use. Facilities may be space for community gatherings and functions, as well as recreational athletic facilities for community members, particularly youth. These include space for non-for-profit offices, child care, community education, theater, senior centers and youth centers and after school programs. CFP match requirements for requests up to $250,000 are 10% eligible project costs. For requests over $250,000 to $1 million, match is 15%.

American Hiking Society: The American Hiking Society provides funding on a national basis for promoting and protecting foot trails and the hiking experience.

The Helen R. Buck Foundation: This foundation provides funding for playground equipment and recreational activities.

Deupree Family Foundation: The Deupree Family Foundation provides grants for recreation, parks/playgrounds and children/youth on a national basis. This foundation supports: building/renovation, equipment, general/operating support, program development and seed money.

The John P. Ellbogen Foundation: The John P. Ellbogen Foundation supports children/youth services grants, as well as support for capital campaigns, general/operating support and program development.

Economic Development Grants for Public Works and Development of Facilities: The U.S. Department of Commerce and Economic Development Administration (EDA) provide grants to states, counties and cities designated as redevelopment areas by EDA for public works projects that can include developing trails and greenway facilities. There is a 30% local match required, except in severely distressed areas where the federal contribution can reach 80%.

OPERATIONAL FUNDING COSTS OPPORTUNITIES

Mill Creek MetroParks has numerous revenue sources to draw from to support operational and management costs that include long term capital replacement costs. The following are funding options to consider in operations department of the MetroParks:

User fees: User fees to access or use elements of parks exist currently, but could be expanded to include fees to access recreation and education programs, a dog park, Farm, a BMX track, skate park, horse park, nature center, sport leagues, winter sports area, ice skating, spray ground and golf for green fees, carts, leagues and lessons.

C**oncessions:** Concessions can be leased out to a private operator for a percentage of gross profits. Typically, 15%-18% of gross profits for concessions of a profit operator or a managing agency over a park site could manage concessions.

Parking Fees: During major or special tournaments, the MetroParks could charge a $5 parking fee for special events hosted in the parks.

Field Permits: The MetroParks can issue field permits for practice or games. Permits should cover the operational and management costs of each field. If a private operator desires to rent the site for a sporting tournament for private gain, the MetroParks should provide a permit fee plus a percentage of gross from the event.

Admission Fee: An admission fee to an event in the park can be implemented.

Walking and Running Event Fees: Event fees for walking and running events in the park can be assessed to cover safety staff managing the event in the MetroParks.

Food and Equipment Sponsors: Official food and beverage sponsors can be solicited for the MetroParks. Each official food and beverage sponsor pays back to the MetroParks a set percentage of gross. Typically, this is 5%-10% of costs for being the official product and receiving exclusive pouring and food rights to the complex. Likewise, official equipment sponsors work well for trucks, mowers and tractors.

Advertising Revenue: Advertising revenue can come from the sale of ads on banners displayed in the parks. The advertising could include trash cans, trail markers, visitor pull trailers, tee boxes, scorecards and in restrooms.

Wi-Fi Revenue: The MetroParks can set up a Wi-Fi area whereby a Wi-Fi vendor is able to sell the advertising on the Wi-Fi access banner to local businesses targeting users of the site. This revenue has totaled between $20,000 and $50,000 in revenue for similar systems.

Cell Tower: Cell tower leases can be used. This revenue source would support $35,000-$50,000 annually for the site, if cell towers are placed in areas in need.

Program Fees: Program Fees to support existing programs can be employed in the form of lessons, clinics, camps, life skill programs and wellness and fitness. These types of programs would help support the operations of the MetroParks.

Special Event Sponsors: Special Events provide a great venue for special events sponsors, as it applies to a concert, stage, entertainment and safety.

Capital Improvement Fee: A Capital Improvement Fee on all programs and events can be added. A capital asset fee of $2-$3 on each person who participates in a class, event or program can be incorporated into the cost of the program or event at the Golf Course, Farm, Nature Center, Horse Park, and Yellow Creek Park.

Shelter Reservations and Room Reservations: Shelters, as well as various rental rooms in the MetroParks can gain operational revenues from these amenities with a typical range of $200-$500 a day for exclusive rental reservations.

Volunteerism: The volunteer source is an indirect revenue source in that persons donate time to the MetroParks to assist in providing a product or service on an hourly basis. This reduces the MetroParks' cost in providing the service and also builds advocacy.

Special Fundraiser: Many agencies hold special fundraisers on an annual basis to help cover specific programs and capital projects to be dedicated to a facility or the MetroParks as a whole.

Private Management of Elements the Park System: The MetroParks should consider outsourcing elements of the operations of the MetroParks to save operating money where applicable. This can include the management of an ice rink, concessions, food and retail operations, mowing, and elements of security that can be outsourced.

Catering: The MetroParks has many sites that are set up with the intention to have high, medium and low level caterers on contract that groups can utilize. Caterers usually provide the parks with a fixed gross rate on food and beverage at 12-15% of the cost of food and 18% of drink back to the MetroParks.

BENCHMARK SALARY ASSESSMENT

INTRODUCTION

PROS Consulting, LLC conducted a benchmark salary assessment to comparable industry leading park and recreation systems. The goal was to evaluate where Mill Creek Metroparks is positioned among peer agencies as it applies to salary wages among different positions. The following park systems where asked for high, medium, and low salary ranges for different positions

- Geauga Park District
- Cleveland Metroparks
- Lake Metroparks
- Five Rivers Metroparks
- Hamilton County
- Muskingum County
- Stark County Park District

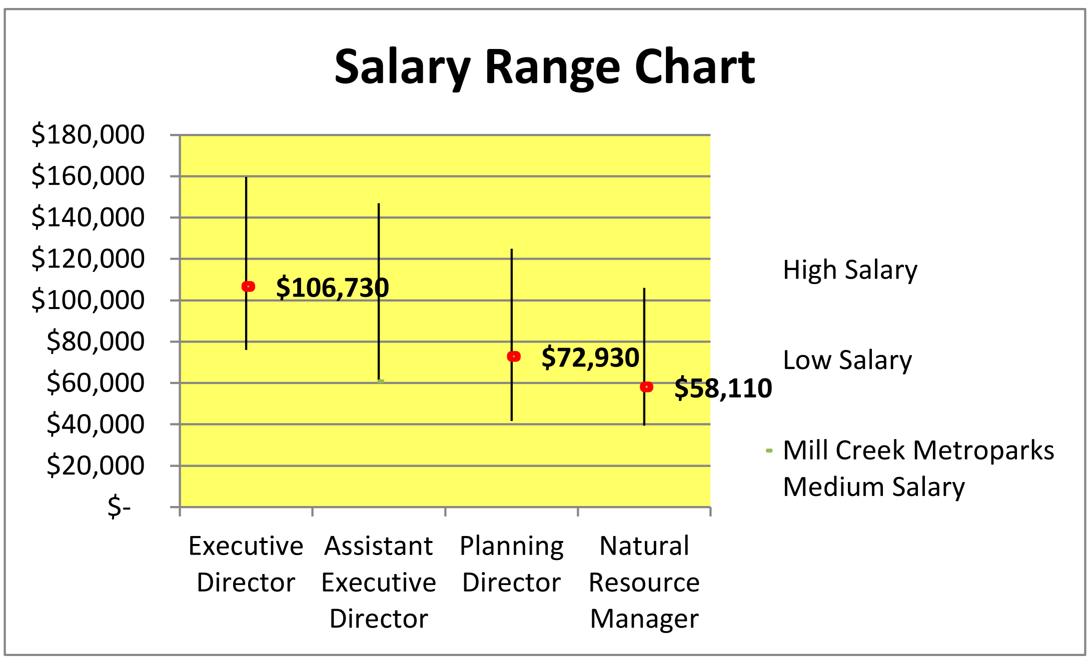
Since each park system is unique to each other, some positions did not directly apply to their park system. Also, job titles did not directly match up with other park systems job titles but was asked to do their best in matching "like" positions.

FINDINGS

The following pages include a matrix of high, medium, and low salary wages for different positions. Also included, is a chart that depicts the high and low salary wage for each position. The chart also shows where Mill Creek Metroparks medium salary wage is positioned among its peers.

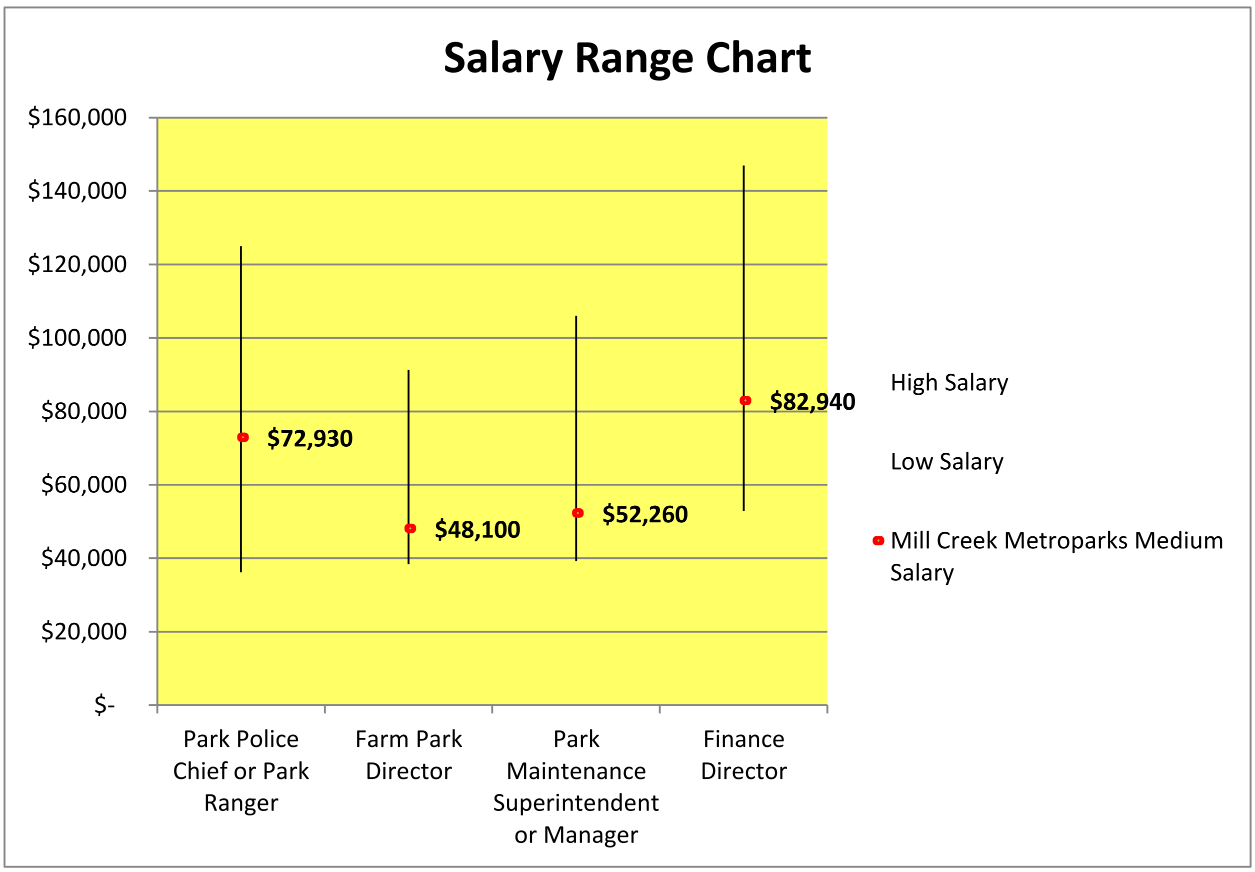
The following matrix and chart are for the following positions: **Executive Director, Assistant Executive Director, Planning Director, and Natural Resource Manager.** Lake Metroparks is a negotiated salary for the Executive Director but currently that salary is at $120,000.

System	Executive Director			Assistant Executive Director			Planning Director			Natural Resource Manager		
	High	Medium	Low	High	Medium	Low	High	Medium	Low	High	Medium	Low
Geauga Park District	$144,000	$ 95,000	$ 76,000	$ 96,000	$ 80,000	$64,000	$ 84,000	$ 70,000	$56,000	$ 84,000	$70,000	$56,000
Cleveland Metroparks	$159,647	$133,039	$106,431	$147,001	$122,501	$98,001	$124,986	$104,155	$83,324	$106,045	$88,371	$70,697
Lake Metroparks	Negotiable			$112,070	$ 93,392	$74,714	$112,070	$ 93,392	$74,714	$ 59,862	$49,878	$39,894
Five Rivers Metroparks	N/A	N/A	N/A	$100,212	$ 80,404	$60,596	$ 68,964	$ 55,333	$41,702	$ 65,150	$52,273	$39,395
Hamilton County	$137,783	$121,691	$105,599	$124,985	$ 11,389	$95,792	$ 98,270	$ 85,531	$72,792	$ 71,950	$66,399	$60,848
Muskingum County	Contract			N/A	N/A	N/A	Contract			$ 78,300	$68,150	$58,000
Stark County Park District	$102,304	$ 93,004	$ 83,704	N/A	N/A	N/A	$ 67,122	$ 61,020	$54,918	$ 67,122	$61,020	$54,918
Mill Creek Metroparks	$128,050	$106,730	$ 85,410	N/A	N/A	N/A	$ 87,490	$ 72,930	$58,370	$ 69,680	$58,110	$46,410



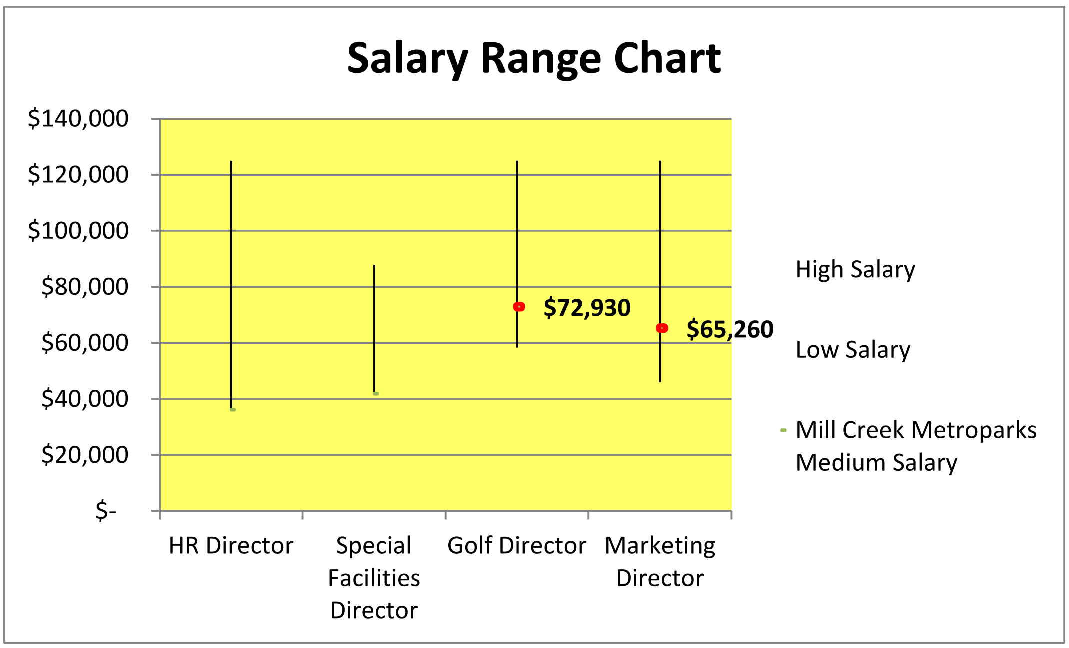
The following matric and chart are for the following positions: **Park Police Chief or Park Ranger, Farm Park Director, Park Maintenance Superintendent or Manager, and Finance Director**.

System	Park Police Chief or Park Ranger			Farm Park Director			Park Maintenance			Finance Director		
	High	Medium	Low	High	Medium	Low	High	Medium	Low	High	Medium	Low
Geauga Park District	$ 84,000	$ 70,000	$ 56,000	N/A	N/A	N/A	$ 58,800	$49,000	$39,200	$ 84,000	$ 70,000	$ 56,000
Cleveland Metroparks	$ 124,986	$ 104,155	$ 83,324	N/A	N/A	N/A	$106,045	$88,371	$70,697	$147,001	$122,501	$ 98,001
Lake Metroparks	$ 76,398	$ 63,668	$ 50,939	$87,859	$73,216	$58,573	$ 59,862	$49,878	$39,894	$112,070	$ 93,392	$ 74,714
Five Rivers Metroparks	$ 87,520	$ 70,221	$ 52,922	$65,150	$52,273	$39,395	$ 89,520	$70,221	$52,922	$ 87,520	$ 70,221	$ 52,922
Hamilton County	$ 102,728	$ 90,730	$ 78,732	$91,325	$80,659	$69,993	$ 91,325	$80,659	$69,993	$110,577	$ 96,230	$ 81,882
Muskingum County	$ 48,880	$ 42,494	$ 36,129	N/A	N/A	N/A	$ 62,100	$54,050	$46,000	Contract	Contract	Contract
Stark County Park District	$ 67,122	$ 61,020	$ 54,918	N/A	N/A	N/A	$ 67,122	$61,020	$54,918	$ 67,122	$ 61,020	$ 54,918
Mill Creek Metroparks	$ 87,490	$ 72,930	$ 58,370	$57,720	$48,100	$38,350	$ 62,660	$52,260	$41,730	$ 99,580	$ 82,940	$ 66,170



The following matric and chart are for the following positions: **Human Resource Director, Special Facilities Director, Golf Director, and Marketing Director.**

System	HR Director			Special Facilities Director			Golf Director			Marketing Director		
	High	Medium	Low	High	Medium	Low	High	Medium	Low	High	Medium	Low
Geauga Park District	$ 58,800	$ 49,000	$ 39,200	N/A	N/A	N/A	N/A	N/A	N/A	$ 84,000	$ 70,000	$ 56,000
Cleveland Metroparks	$ 124,986	$ 104,155	$ 83,324	N/A	N/A	N/A	$124,986	$104,155	$ 83,324	$124,986	$104,155	$ 83,324
Lake Metroparks	$ 76,398	$ 63,668	$ 50,939	$ 87,859	$ 73,216	$ 58,573	$ 87,859	$ 73,216	$ 58,573	$ 76,398	$ 63,668	$ 50,939
Five Rivers Metroparks	$ 87,520	$ 70,221	$ 52,922	$ 68,964	$ 55,333	$ 41,702	N/A	N/A	N/A	$ 87,520	$ 70,221	$ 52,922
Hamilton County	$ 69,145	$ 61,168	$ 53,190	N/A	N/A	N/A	$ 91,325	$ 84,160	$ 76,994	$ 76,295	$ 70,409	$ 64,523
Muskingum County	$ 62,100	$ 54,050	$ 46,000	$ 62,100	$ 54,050	$ 46,000	N/A	N/A	N/A	$ 62,100	$ 54,050	$ 46,000
Stark County Park District	$ 44,039	$ 40,036	$ 36,032	N/A	N/A	N/A	N/A	N/A	N/A	$ 57,230	$ 52,028	$ 46,825
Mill Creek Metroparks	N/A	N/A	N/A	N/A	N/A	N/A	$ 87,490	$ 72,930	$ 58,370	$ 78,390	$ 65,260	$ 52,130



The following matric and chart are for the following positions: **Purchasing Director and Park Facilities Manager.**

System	Purchasing Director			Park Facilities Manager		
	High	Medium	Low	High	Medium	Low
Geauga Park District	N/A	N/A	N/A	N/A	N/A	N/A
Cleveland Metroparks	$ 89,935	$ 74,946	$ 59,957	$ 89,935	$ 74,946	$ 59,957
Lake Metroparks	$ 59,862	$ 49,878	$ 39,894	$ 53,477	$ 44,574	$ 35,651
Five Rivers Metroparks	$ 68,964	$ 55,333	$ 41,702	$ 56,398	$ 45,251	$ 34,103
Hamilton County	N/A	N/A	N/A	$ 73,589	$ 67,815	$ 62,040
Muskingum County	$ 54,049	$ 46,999	$ 39,949	$ 62,100	$ 54,050	$ 46,000
Stark County Park District	N/A	N/A	N/A	$ 46,356	$ 42,142	$ 37,928
Mill Creek Metroparks	N/A	N/A	N/A	N/A	N/A	N/A