

Chapter Four - Outdoor Recreation Demand and Need

There is no consensus in the field of recreation planning as to the most appropriate methods for measuring current and future demand for outdoor recreation resources and facilities. Since outdoor recreation resources and facilities are generally felt to be “free” goods and services, “demand,” as an economic concept, does not readily lend itself to practical application. No commonly accepted methods exist for determining, on a statewide or broad regional basis, the amount of outdoor recreation a person would “consume” under certain conditions of cost and availability. As a result, the use of the term “demand” is common as a means of expressing the actual participation in recreation activity by some defined group or population over a fixed period of time. Such measurements can provide reasonably sound estimates of recreation demand and are vital to long-range statewide outdoor recreation planning.

OUTDOOR RECREATION DEMAND

To estimate outdoor recreation demand in Florida, the Division of Recreation and Parks conducts periodic surveys of resident and tourist participation in outdoor recreation activities. The 2011 Florida Outdoor Recreation Participation Study was conducted by Responsive Management, a natural resource survey research firm. The study



Edward Ball Wakulla Springs State Park is a favorite recreational spot for residents and tourists

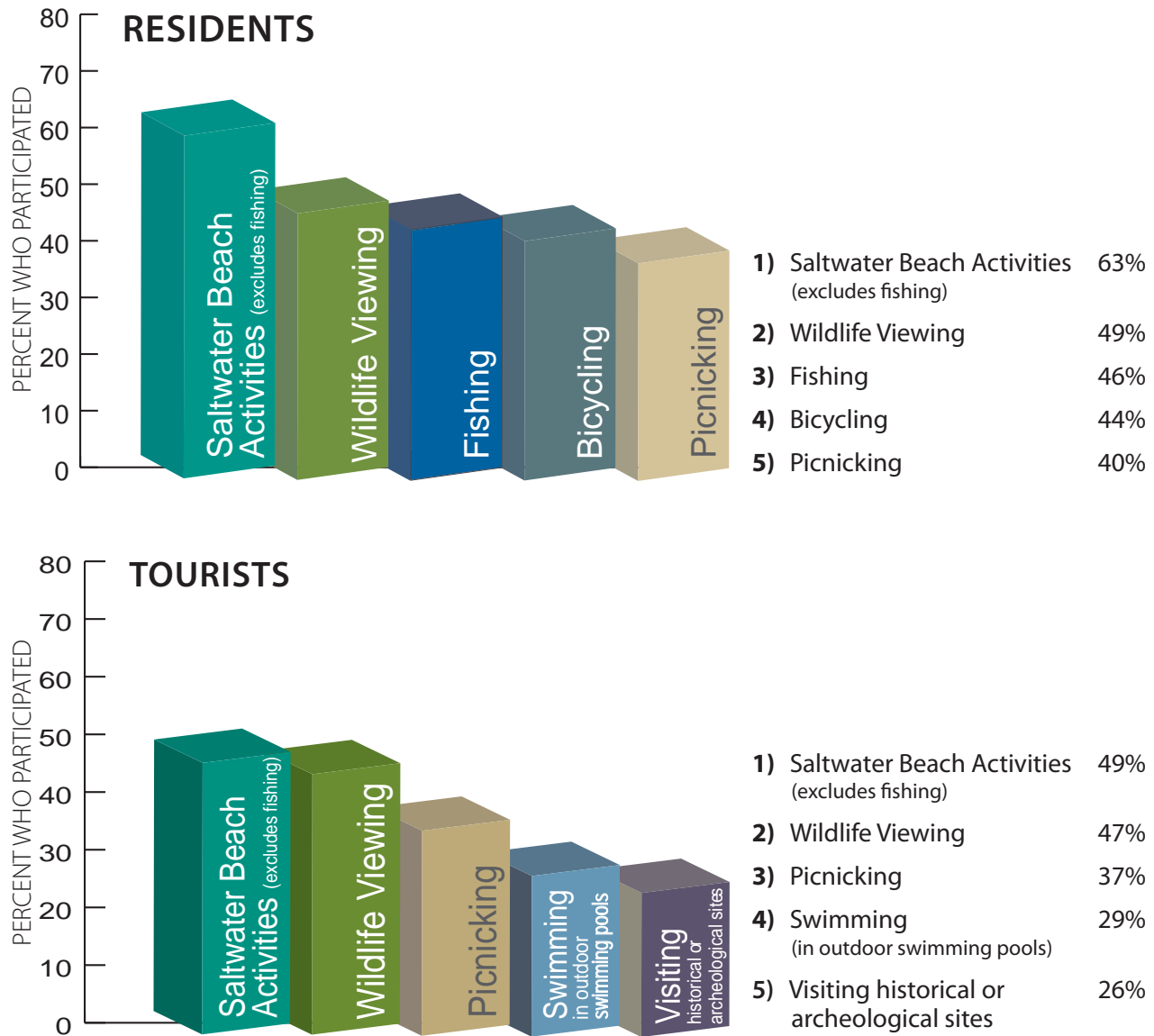
surveyed Florida residents by telephone between April and September 2011 regarding their participation in 26 different outdoor recreation activities. Participants were asked to identify each activity they participated in during the preceding 12 months. A survey of tourists was conducted in three phases: May, August and October 2011. Responsive Management completed 3,961 surveys with residents and 2,890 surveys with tourists. The methodologies used to conduct the resident and tourist surveys are described in Appendix E.

Based on the results of the surveys, the percentages of Florida residents and tourists who participated in each of the activities were calculated. The percentages indicate the number of residents and tourists in each region who actually took part in an activity at least one time during the preceding year. By applying these percentages to estimates of resident and tourist populations for 2010, the number of people who participated in each activity was calculated for the state and for each planning region. These methods were repeated using resident and tourist population projections for 2020. Figure 4.1 shows the top five recreation activities for residents and visitors statewide for 2010. Appendix G provides the resident and tourist participation rates for each measured activity.

Saltwater beach activities remain the activity in which the largest percentage of residents participated. Wildlife viewing, bicycling, picnicking, visiting historical or archaeological sites and saltwater fishing had the next highest percentages of participation. Resident participation rates for other activities ranged from 29 percent for swimming in public outdoor pools to one percent for horseback camping.

Among tourists, saltwater beach activities also had the highest level of participation

Top Five Outdoor Recreation Opportunities: *Residents & Tourists*



See Appendix G for full list of outdoor recreation participation by activity

Figure 4.1

at 49 percent. This was followed closely by wildlife viewing at 48 percent. Picnicking, swimming in public outdoor pools, visiting archaeological and historic sites, hiking and saltwater fishing had the next highest levels of participation. Participation rates for the other activities ranged from 14 percent for both bicycling and freshwater beach use to 2 percent for soccer and football.

Importance of Recreation

The participation survey determined that nearly all Florida residents (96 percent) say

that outdoor recreation is important to them; this includes 72 percent who think it is very important and 24 percent who think it is somewhat important. The results are similar among tourists: 98 percent say outdoor recreation is important to them personally (65 percent saying very important and 33 percent saying somewhat important).

Motivations for Participation

An important aspect of planning for outdoor recreation is understanding why people recreate; what motivates them to get

outside and participate. According to the participation survey, for Florida residents, health and physical fitness is considered the most important reason for participation, followed by being with family and friends, for fun/relaxation, and being outdoors and closer to nature.

Top Reasons for Resident Participation

- 1) For health/physical fitness
- 2) To be with family and friends
- 3) For relaxation/fun/enjoyment
- 4) To be outdoors/close to nature
- 5) To enjoy the scenery

The most important reason for tourist participation in outdoor recreation in Florida is for fun and relaxation, followed by being with family and friends and the attractiveness of Florida's recreation opportunities and climate.

Top Reasons for Tourist Participation

- 1) For relaxation/fun/enjoyment
- 2) To be with family and friends
- 3) Florida has good/attractive recreation opportunities/climate
- 4) To be outdoors/close to nature
- 5) Beach (specifically mentioned)

Satisfaction with Opportunities

The participation survey found that the overwhelming majority of Florida residents are satisfied with the outdoor recreation opportunities in their home county and support Florida maintaining its current levels of outdoor recreation services and opportunities. Among tourists, satisfaction with opportunities is even higher, and a large majority of tourists support maintaining the current levels of outdoor recreation services and opportunities in Florida. This is not to say there are no needs for improvement,

but rather emphasizes the need for at least maintaining current levels of service as the population grows.

Satisfaction with Outdoor Recreation Opportunities - Residents and Tourists

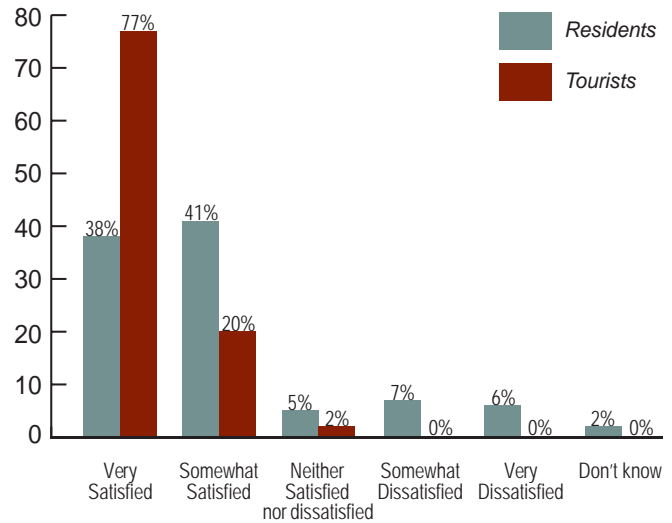


Figure 4.2

Respondents' opinions of the quality of facilities in their home counties are also positive, with nearly 80 percent rating the facilities excellent or good. On the other end, 20 percent rate them fair or poor, and without continued maintenance, this number is expected to rise.

Top Desired Facilities - Residents and Tourists

RESIDENTS

- 1) Community parks
- 2) Biking paths
- 3) Playgrounds
- 4) Outdoor public swimming pools
- 5) Hiking/walking trails

TOURISTS

- 1) Improved amenities at existing recreation areas (bathrooms, etc.)
- 2) Community Parks
- 3) Beach Access/Parking
- 4) Waterpark
- 5) Saltwater Boat Access/Ramps



Children enjoy the splash pad at Lake Mirror Park in Lakeland, credit Mary Anne Koos

COMPARING DEMAND AND SUPPLY

The resident and tourist demand figures derived from the participation study were compared to the supply data presented in Chapter 3. This produced estimates of the additional outdoor recreation resources and facilities that will be required to maintain current levels of services as resident and tourist populations increase in the future.

The level of service that is currently provided by each region's existing supply of resources and facilities was determined for each activity. "Level of service" as used in this plan means the amount of resources and facilities that are available to support an activity, expressed in terms of units of supply per 1,000 participants. For example, the level of service for hiking trails would be expressed as miles of trail per 1,000 participants. Levels of service were not calculated for certain outdoor recreation activities, such as saltwater and freshwater boating, since the resources that support them are so extensive that they can accommodate a virtually

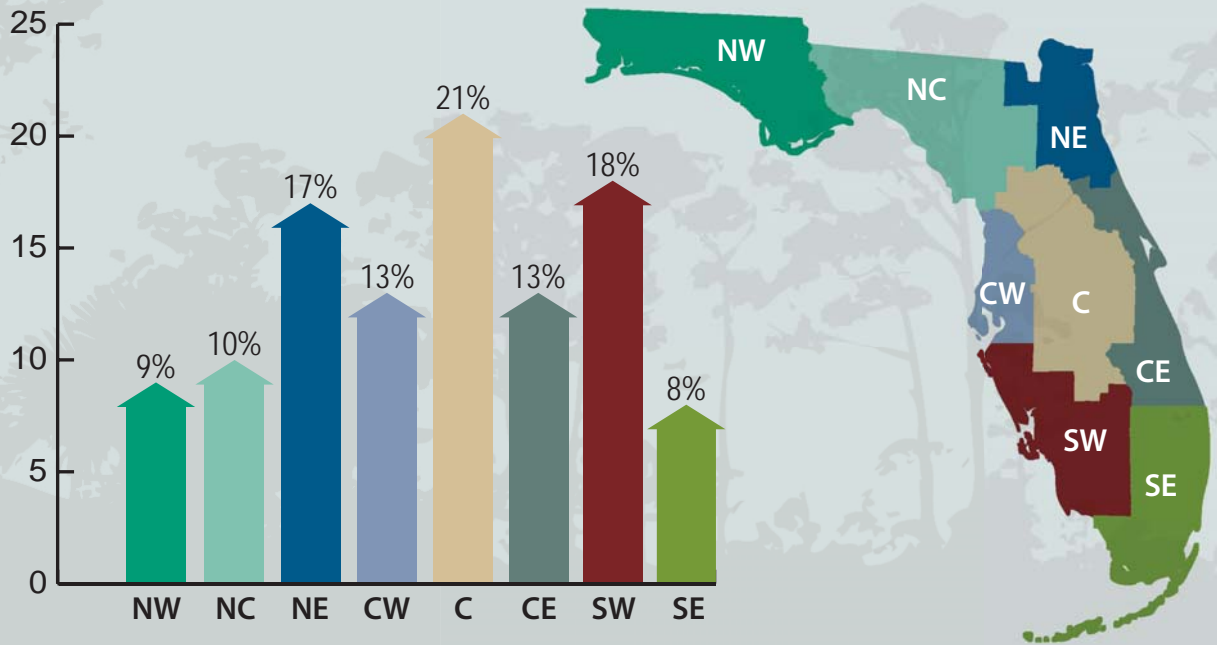
unlimited amount of demand (for example, the open waters of the Atlantic Ocean, the Gulf of Mexico and the state's thousands of lakes and rivers).

Regional Comparisons: Assessing Need

Each region's level of service was estimated for all 26 activities. To provide a standard by which the regions could be compared, the statewide median level of service for each activity was calculated. Table 4.1 (page 53) identifies whether each region's level of service falls above or below the statewide median for an activity.

The level of service comparisons are only one measure of outdoor recreation resource and facility needs in Florida. Outdoor recreation levels of service vary tremendously from community to community and are determined by complex factors that cannot be addressed practicably at a statewide level. The analysis is intended to reflect conditions in the region as a whole and should not be applied to particular communities. Additionally, level of

Predicted Percent Population Change by 2030



This chart shows projected population growth for each region. Regions with rapid growth will continue to see a rise in demand and strain on existing outdoor recreation resources.

service is heavily influenced by the resident and tourist populations. A region with a lower level of service does not necessarily have fewer facilities, but often has a greater number of participants using the facilities.

Despite these limitations, the analysis presented in the plan is useful for identifying regional and statewide patterns of outdoor recreation supply and demand and offering a reasonably sound understanding of regions with the greatest needs to support the

demands of their population. Increasing opportunities should be a statewide priority, and not solely focused on regions below the statewide median. While these regions have greater relative needs to adequately supply their participants, all regions must continue to enhance their outdoor recreation opportunities to meet the needs of a growing population.

The results of the assessment are presented fully in Appendix H.

$$\text{Level of Service} = \frac{\text{Resources and Facilities for an Activity}}{\left(\frac{\text{Participants in the Activity}}{1,000} \right)}$$

Figure 4.3

Understanding Level of Service: An Overview of Demand and Supply

Regional Distribution of Residents and Tourists (Potential Users)

The same outdoor recreation resources and facilities that make Florida a great place to live are also the primary reason people visit Florida. Day-to-day use by residents, combined with seasonal use by visitors, affect a region's level of service by increasing the overall number of users. Outdoor recreation resources and facilities see significantly greater use in regions with high tourism rates, which has the effect of reducing the overall level of service in that region.

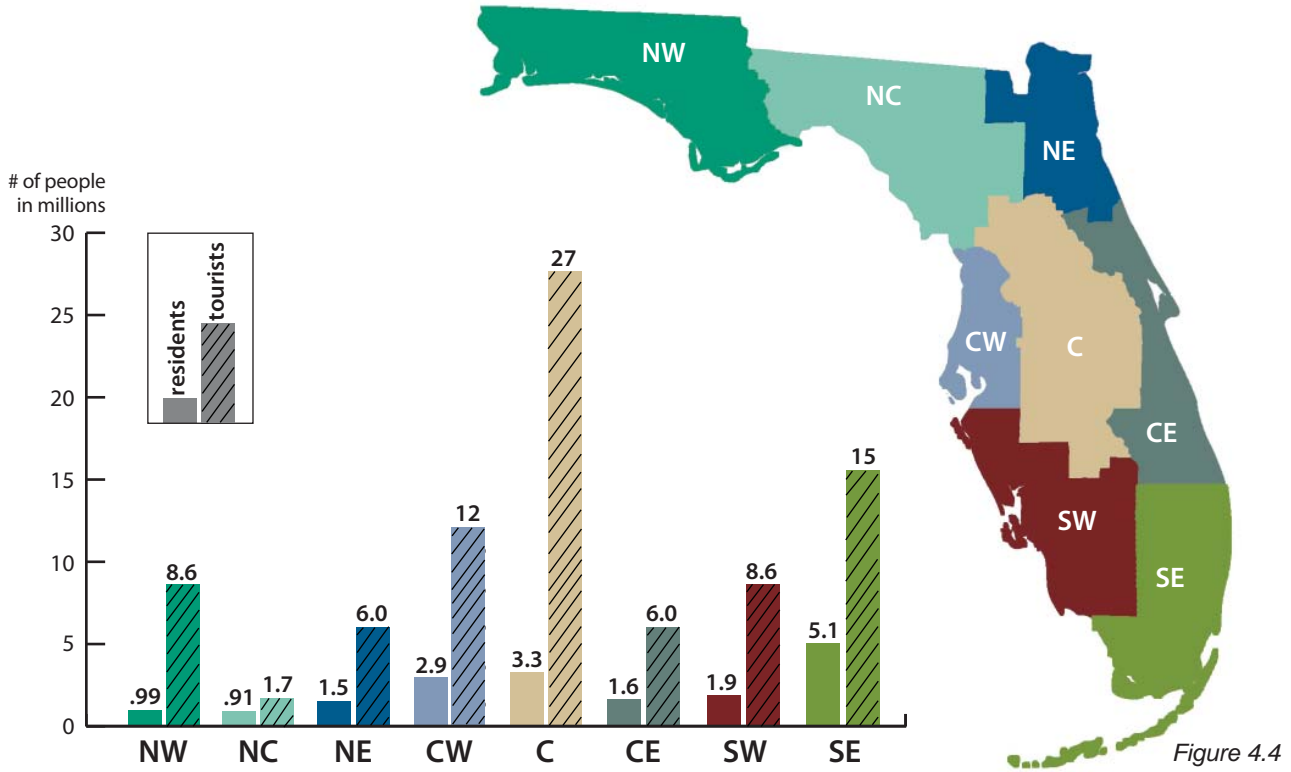


Figure 4.4

Regional Distribution of Recreation Resources and Facilities

The charts below show the relative distribution of the supply of outdoor recreation resources and facilities by region. Dividing a region's amount of recreation resources and facilities **for each activity** by the number of residents and tourists who actually participate in the activity determines the level of service for each activity by region.

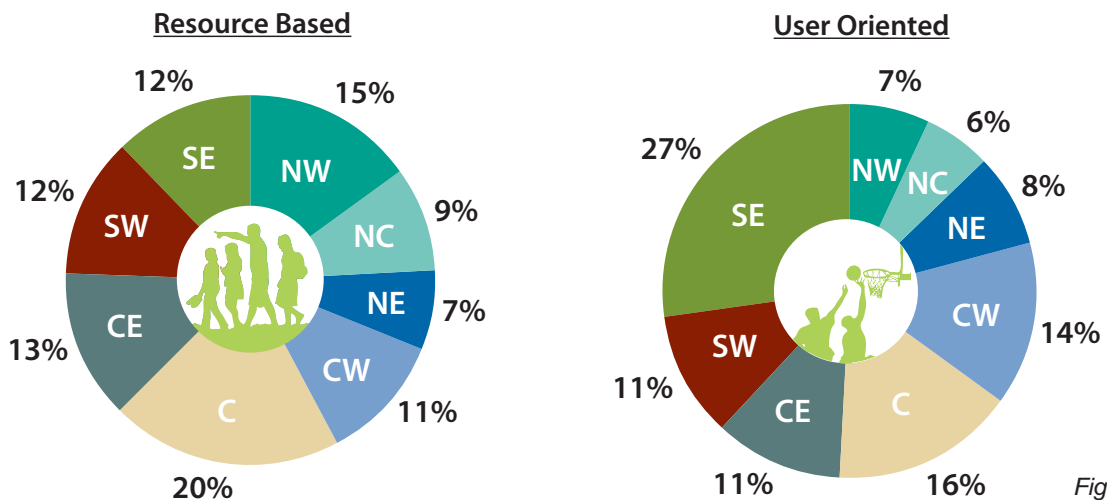


Figure 4.5

Comparing Regional Levels of Service to Statewide Median*

● Level of Service **Above** Statewide Median ○ Level of Service **Below** Statewide Median

Resource-Based Activities	Region							
	NW	NC	NE	CW	C	CE	SW	SE
Saltwater Beach Activities	●	○	●	○	NA	●	●	○
Freshwater Beach Activities	●	●	○	○	○	●	○	●
Saltwater Fishing Non-boat	●	○	○	○	NA	●	●	●
Freshwater Fishing Non-boat	○	●	○	●	●	○	●	○
Saltwater Boat Ramp	●	●	○	○	NA	●	●	○
Freshwater Boat Ramp	●	●	●	○	○	●	○	○
Bicycling Paved	○	●	○	●	○	●	●	○
Bicycling Unpaved	○	●	●	○	○	●	●	○
Hiking	●	●	○	○	○	●	●	○
Horseback Riding	○	●	●	○	○	●	●	○
Off-Highway Vehicle Driving	●	●	○	○	○	●	●	○
Nature Study	●	●	●	○	○	●	○	○
Picnicking	○	●	○	○	○	●	●	●
Visiting Historical or Archaeological Sites	○	●	●	○	○	●	●	○
Tent Camping	●	●	●	○	○	○	●	○
RV or Trailer Camping	○	●	○	●	○	●	●	○
Hunting	●	●	○	○	○	○	●	●

User-Oriented Activities	Region							
	NW	NC	NE	CW	C	CE	SW	SE
Swimming in Public Outdoor Pool	○	●	○	○	○	●	●	●
Baseball or Softball	●	●	●	○	○	●	○	○
Outdoor Basketball	○	●	●	●	○	●	○	○
Outdoor Tennis	○	●	○	○	○	●	●	●
Soccer	●	●	●	○	○	●	○	○
Football	●	●	●	○	○	●	○	○
Golf	○	○	●	○	○	●	●	●

* Table shows SCORP planning regions as either above or below the statewide median level of service, per activity. See Appendix G for regional level of service calculations per activity.

Table 4.1

CONCLUSION

The purpose of this chapter is to identify regional and statewide patterns of outdoor recreation supply and demand, offering a reasonably sound understanding of regions with the greatest needs to support the demands of their population. Regions with dense populations, such as the Northeast, Central West, Central and Southeast regions tend to have the greatest needs, a trend which will likely continue if these needs are not adequately addressed.

The steady rise of Florida's population will lead to an increasing demand in all regions, calling for a continuing need for the provision of outdoor recreation facilities and the conservation of natural and cultural resources. It is critical to ensure that these resources and facilities enjoyed by the over 100 million residents and tourists today are there for those in the future.