

02 | DEMOGRAPHICS + TRENDS

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A detailed and accurate understanding of a community’s demographics is a critical component of a successful long-range plan. Continual population growth and change drive several of this plan’s goals and recommendations, providing a roadmap to keep Apex’s Parks, Recreation & Cultural Resources offerings at pace with the evolving demand.

The demographic analysis adds nuance to the variable of population growth. Within a growing population, the demographic traits of the population are likely to shift over time. Age groups, races, and income levels segmentation are all likely to shift as a population grows and demographics shifts. These shifts can change the need for the types of recreational facilities and programs that best serve the community.

Trends in recreational preferences change continuously, which sparks ongoing changes in demand for new activities and programming. Even when demographic factors remain the same, changing preferences and trends influence the demand for parks and recreation programs and facilities.

This chapter provides a summary of the Town of Apex’s demographic characteristics and summarizes the Town’s future population projections through 2031. This quantitative analysis contextualizes Apex’s future needs for parks, greenways, recreation, and cultural programming based on demographic and market research data.

Included in this analysis is an overview of current demographics and population growth projections, for the 10-year planning horizon, and a summary of national and local trends. The combination of these two sets of data provides the framework for recommendations that target the current and future population and align with trends in recreation.

◀ Figure 2.1 - Downtown Apex



DATA SOURCES

This analysis draws data from the U.S. Census Bureau (USCB), the Bureau of Labor Statistics (BLS), and the Environmental Systems Research Institute (ESRI). ESRI an international supplier of geographic information system software, web GIS and geodatabase management. ESRI uses data from the US Census Bureau, the Internal Revenue Service (IRS), and high-quality local sources.

Components of this analysis, including population projections, are sourced from ESRI. ESRI uses proprietary methodology for creating a current population estimate and a five-year population projection estimate. ESRI uses data from the USCB, IRS, and high-quality local sources. ESRI data is available at Census Blocks level, which are specially tailored to estimating demographic characteristics of small areas. ESRI encourages use of their data in conjunction with other sources of data, saying “ESRI revises its forecasts annually to draw from the latest data. However, this data can be enhanced with personal knowledge of an area to provide the qualitative, anecdotal detail that in not capture in a national database. It is incumbent on the data users and producers to incorporate as much information as possible when assessing local trends.”

Data obtained from the USCB is the foundation of this demographic analysis. Census data is the most comprehensive and accurate data collected in the United States. Census data includes data gathered from the Decennial Census of Population and Housing, conducted every 10 years, and the American Community Survey, conducted on an ongoing basis and reported every five years. In this chapter, the analysis for geographic mobility and special populations is summarized from Census Data. In all other cases, data is collected and synthesized using a variety of demographic analysis methods to inform current and future demographic characteristics.

Data obtained from the BLS is used to assess employment levels in the community, including data on employment and unemployment rate.

ESTIMATES AND PROJECTIONS

Estimates and projections are the core of demographic analysis. Estimates provide a summary of an area’s current population or demographics characteristics at a given point in time. Projections are proposed for a potential future scenario such as population, based on certain assumptions such as a consistent growth rate or expected increase in migration.

Average Annual Growth

Average annual growth is a measure for determining the rate of growth per year over a given period. The average annual growth rate is useful for showing the rate at which population growth is occurring per year, when population estimate data available spans a multi-year period. An indication of past growth can be used to form the basis for projecting the population for a future year. Data obtained from USCB and ESRI indicates the Town’s average annual growth rate is 2.72 percent.

	TOWN OF APEX	NORTH CAROLINA	UNITED STATES
	2.72%	0.95%	0.7%

Figure 2.3 - Average annual growth



Figure 2.2 - Peakfest



Figure 2.4 - Downtown Apex



Population Projections¹

This report uses stacked bar charts to display changes in demographic characteristics over time. These charts use ESRI's analysis of demographic characteristics of Apex, which provides an understanding of overall population growth as well as expected changes in subsections of age, race, and household income. ESRI's analysis estimates data for 2021 and makes a projection for 2026. To develop the population proportions of demographic trends through 2031, this analysis calculates the average annual growth rate for each demographic segment between 2021 and 2026 and uses that to make projections for each population segment through 2031.

	POPULATION 2021	POPULATION 2031
	62,689	81,986

Figure 2.5 - Population Projections

Age Segment

Figure 2.7 presents the changing proportions of the age cohorts based on population estimates and projections from 2021 through 2031. The proportional charts show youth population proportions decreasing by 1.8% while slight upward increase in age segment between the ages of 25 and 34 as well as over the age of 55. All other segments experienced a flattened or downward trend in share of population. The median age in 2021 in the Town of Apex was 36.2, compared to 38.3 for North Carolina and 38.1 for the United States.

	TOWN OF APEX	NORTH CAROLINA	UNITED STATES
	36.2	38.3	38.1

Figure 2.7 - Age Segment

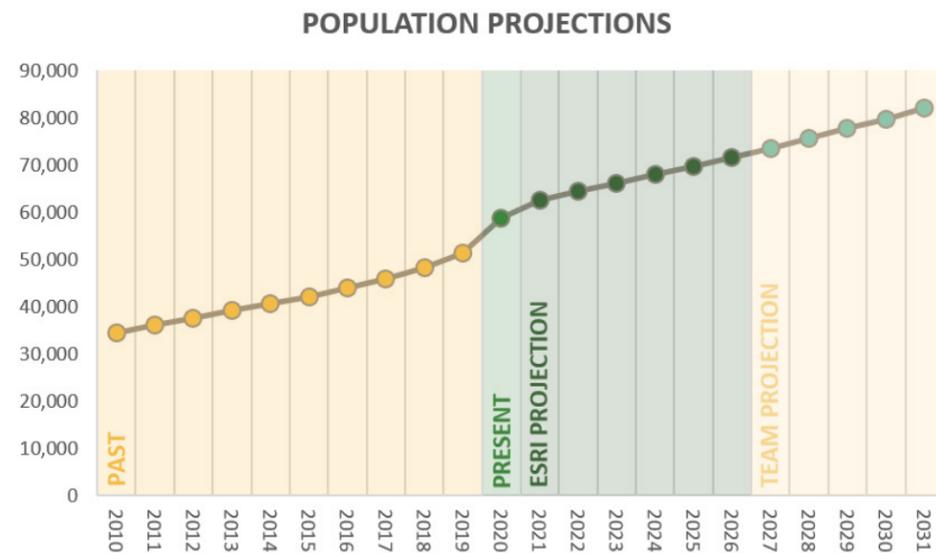


Figure 2.6 - Population Projection for the Town of Apex through 2031 (Sources: American Community Survey, 2020 Census, ESRI Community Profile)

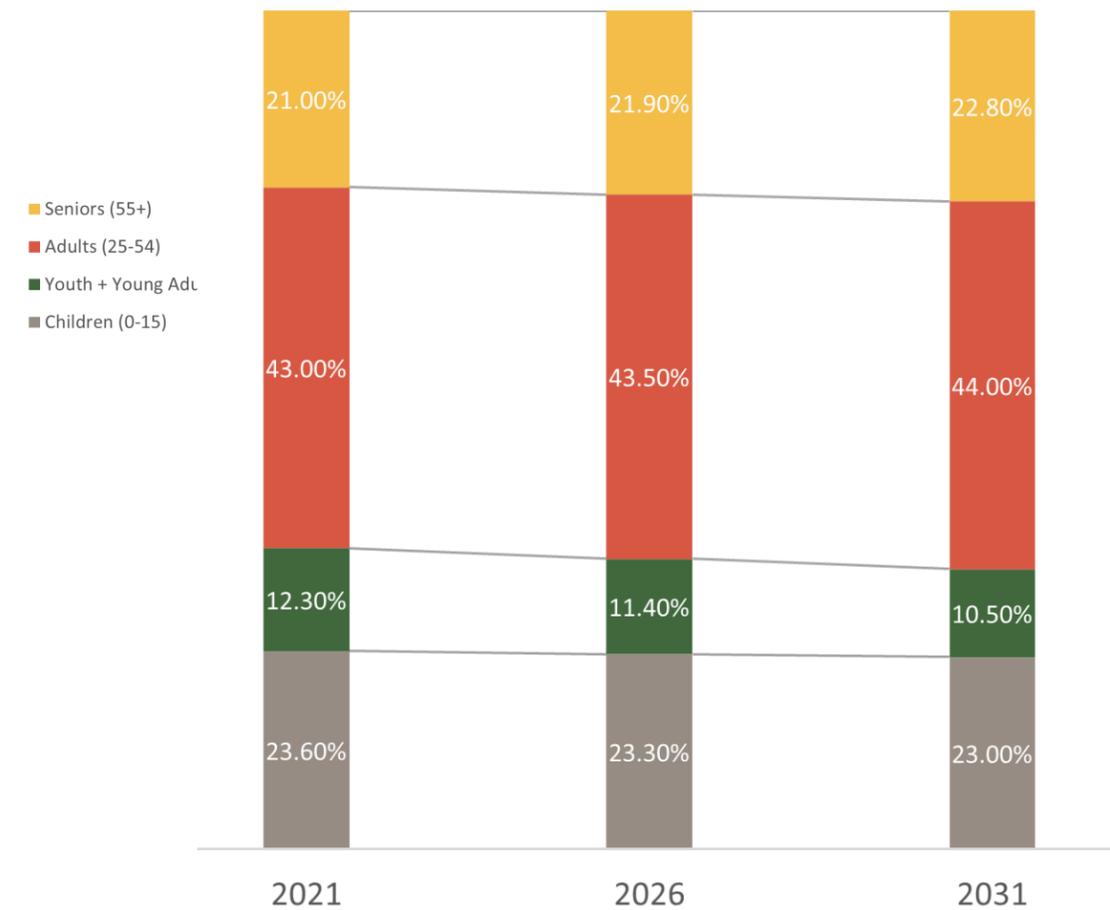


Figure 2.8 - Age Segmentation projections through 2031 (Source: ESRI Community Profile)

¹ Town of Apex continuously updates the population data and projections as part of the monthly Development Report. According to this report, there is some discrepancy in the 2016-2020 American Community Survey data and the Town's internal projections. The population numbers used in this report are based on available census data and not Town's internal estimates. Population projections used for this report should be considered a snapshot in time when the report was written (April 2022). Municipalities undergo changes constantly over the course of a planning project that can have an impact on population numbers. These numbers aren't intended to be absolutes and are rather meant to provide an insight into a general population size and the magnitude of change over time. The plan recommendations will not be solely rooted in these numbers in recognition of the fact that getting a correct number is not possible.



Race and Ethnicity

Estimates show that currently, residents identifying as White Alone make up over 73 percent of the population. In the coming years this will shift as the populations of non-white individuals increases. As seen in Figure 2.9, the largest growth will be experienced in the portion of the population that identifies as Asian Alone with a projected increase of 2.6 percent of the total population to 14 percent.

While all other segments of the population other than White Alone are experiencing positive annual growth rates, those rates of growth are significantly smaller and are thus contributing to relatively static levels of population makeup. For example, the percent of the population of Hispanic Origin is experiencing a positive annual growth rate of 0.18 percent per year and will make up 7.7 percent of the population by 2031.

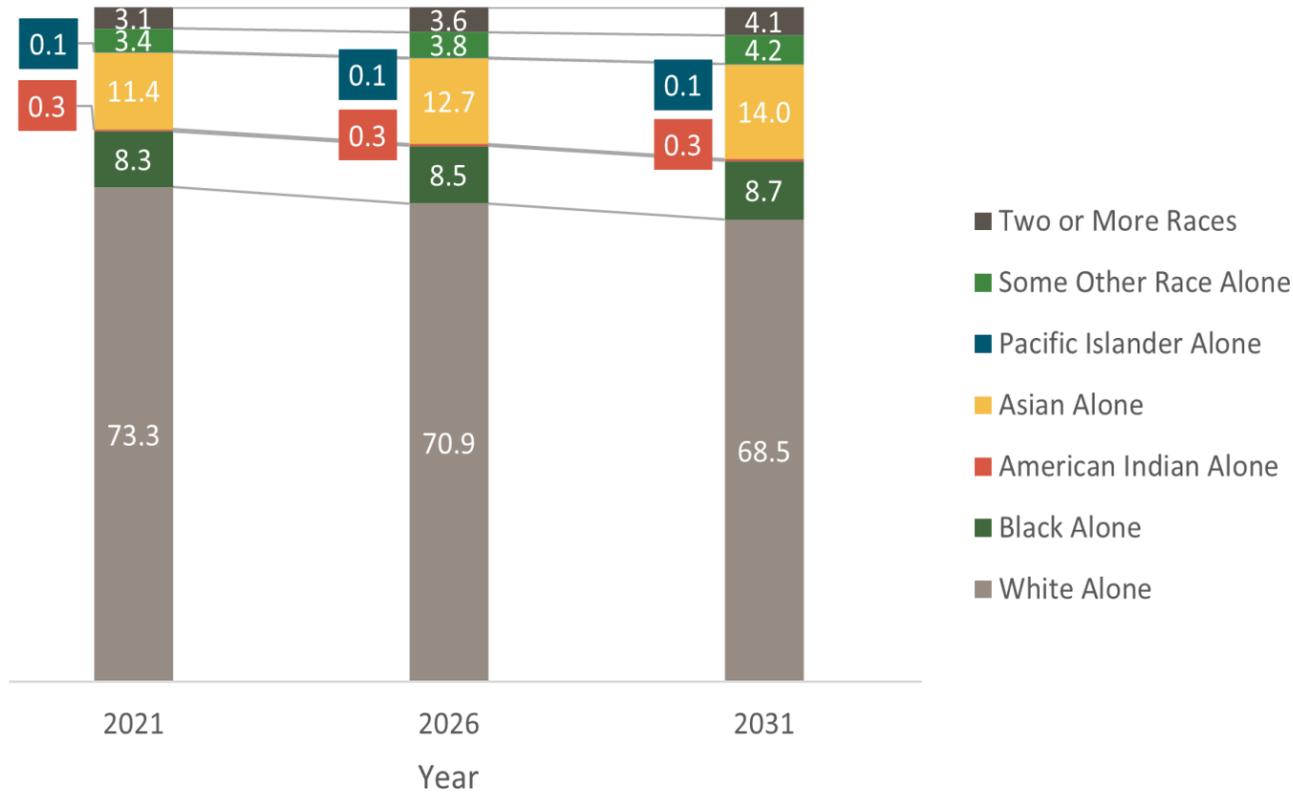


Figure 2.9 - Racial Segmentation projections through 2031 (Source: ESRI Community Profile)

Household Income

Figure 2.11 shows the proportional distribution of income for households in Apex. Currently, 59.5 percent of the population has a household income of over \$100,000. By 2031 the percent of the population at or over that income level will increase to 71 percent. The percentage of the population making less than \$75,000 is experiencing a marked decline, with households earning \$75,000 or more but less than \$100,000 experiencing a more moderate decline in share of population.

According to the ESRI Community Profile, the median household income in 2021 was \$138,277, a figure that is projected to increase to \$172,016 by 2031. This is more than double the median household income in for the US and three times that for North Carolina.

TOWN OF APEX	NORTH CAROLINA	UNITED STATES
\$138,277	\$54,602	\$67,521

Figure 2.10 - Household Income

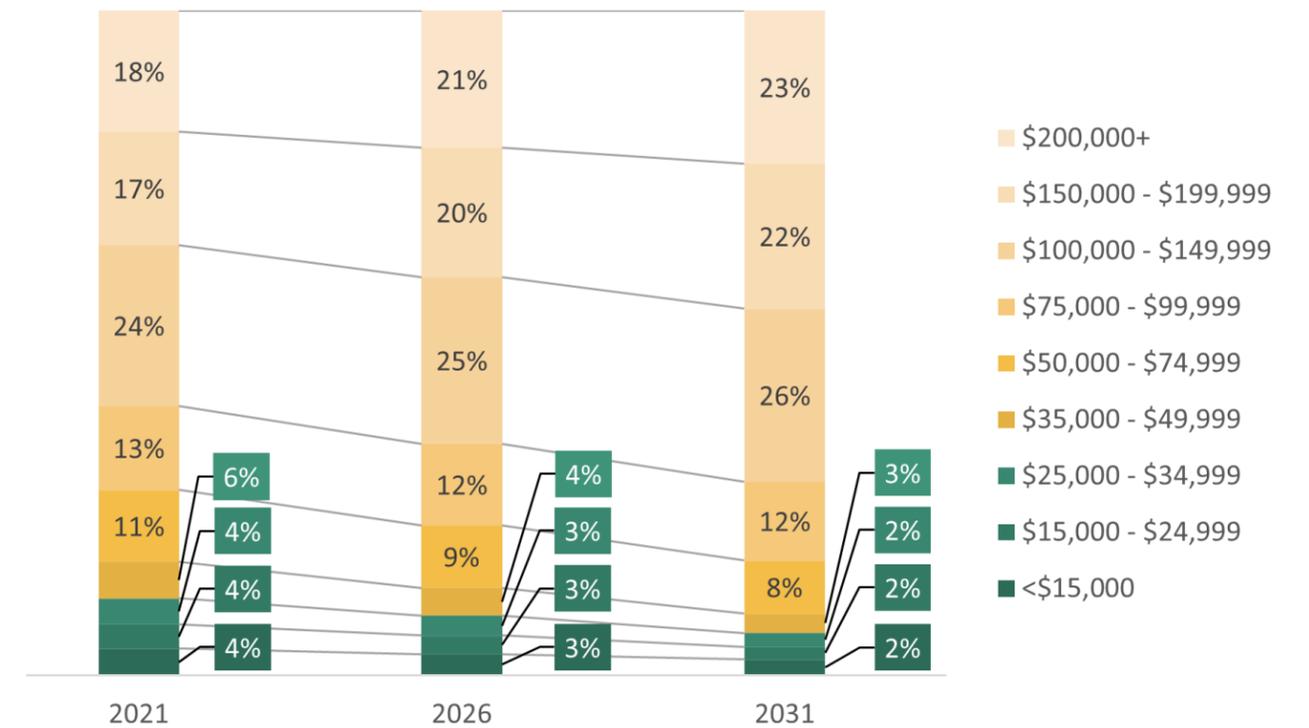
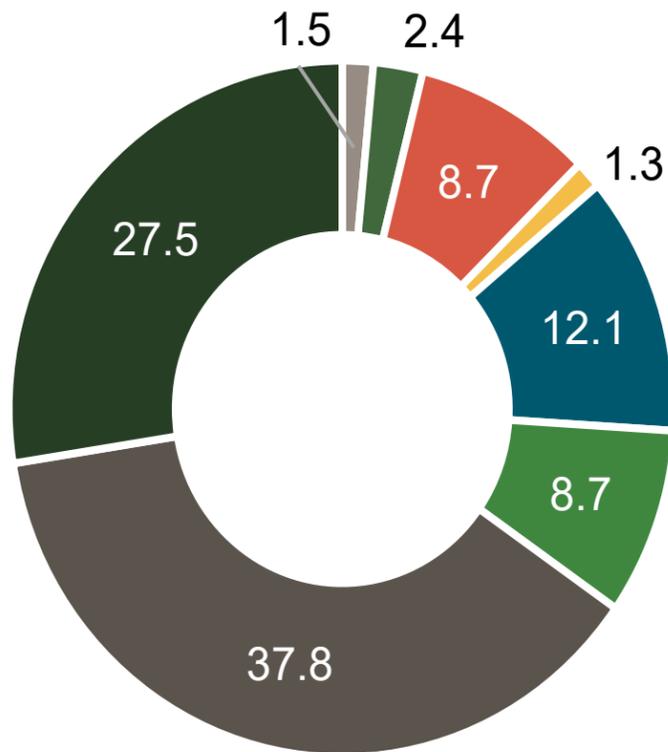


Figure 2.11 - Household Income Segmentation projections through 2031 (Source: ESRI Community Profile)

Education

The Town of Apex's population is a highly educated one. According to estimates for 2021, 74 percent of the population has attained some type of degree beyond a High School Diploma or equivalent. Almost 28 percent of the population has a degree beyond a Bachelor's. Only 3.9 percent of the population does not have a High School Diploma or equivalent.



- Less than 9th Grade
- 9th - 12th Grade, No Diploma
- High School Graduate
- GED/Alternative Credential
- Some College, No Degree
- Associate Degree
- Bachelor's Degree
- Graduate/Professional Degree

Figure 2.12 - Education Attainment in 2021 as percentage of population (Source: ESRI Community Profile)

Households with Children

Using estimates from the 2010 Census and 2019 American Community Survey, the percentage of households in Apex with children is seeing a declining trend. In 2010, 49.4 percent of households had children, while in 2019, 46.9 percent of households had children. Using projections based on this data, 43.6 percent of households will have children in 2031.

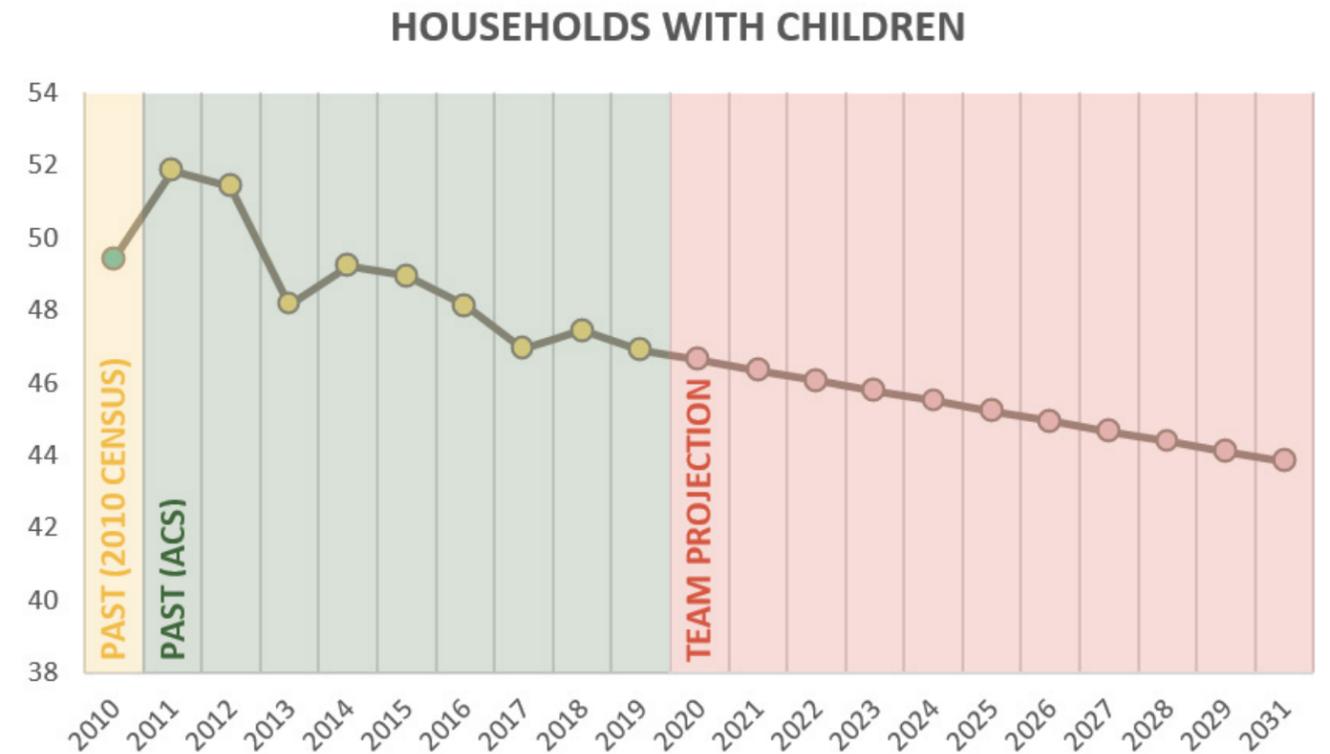


Figure 2.13 - Percentage of Households with Children (Sources: US Census, American Community Survey)



Housing Tenure and Geographic Mobility

Geographic mobility looks at the percentage of the population that lived in the same house they lived in the year prior or, if they do not live in the same house, where they moved from.

Looking at estimates for 2014-2019, the only years data is available for, housing tenure in Apex is high, averaging at 85% of individuals living in the same home they did the year prior. Among those moving into

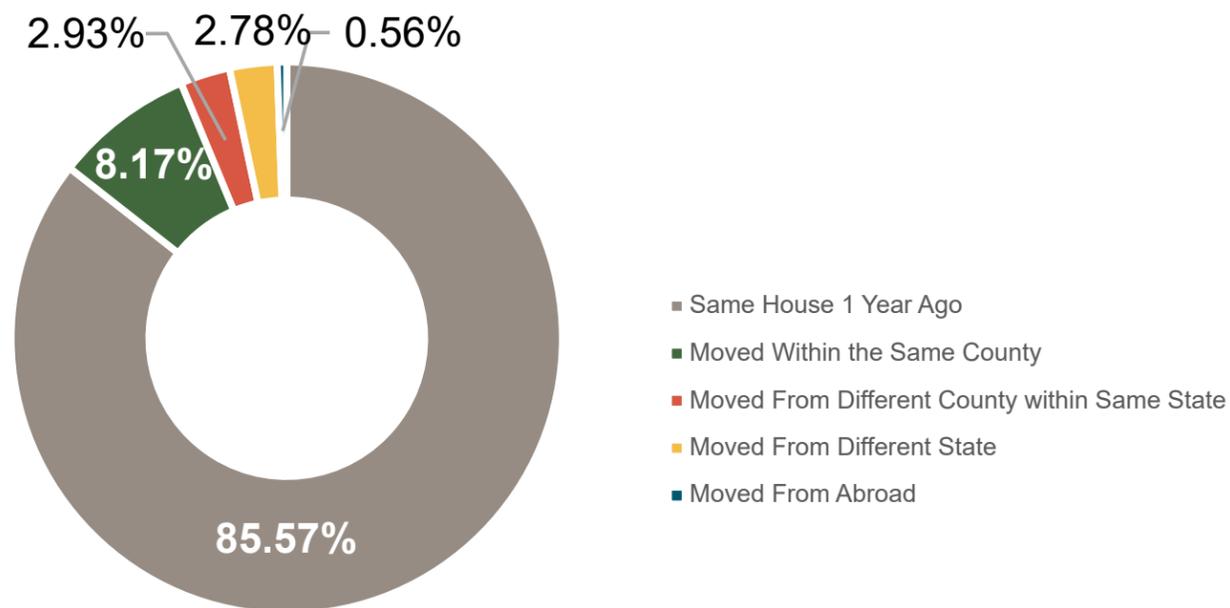


Figure 2.14 - Residential Mobility for individuals in the Town of Apex. (Source: American Community Survey)

the Town annually, most individuals (8 percent of the total population) are coming from within Wake County. Individuals moving from within North Carolina and from other states comprise an average of 2.9 and 2.7 percent of the population, respectively. Individuals moving from abroad comprise 0.6 percent of the total population.

Special Populations

Figure 2.15 shows the percentage of the overall population in the Town of Apex with a disability based on American Community Survey estimates. The 64-and-older age segment is experiencing the highest level of disability. The most common disability is an ambulatory difficulty which is defined as an impairment which prevents or impedes walking, followed by self-care difficulty and independent living difficulty. The under 18 population has the highest level of cognitive difficulty (aka Intellectual disability) which is when a person has certain limitations in mental functions and in skills such as communication, self-help, and social skills.

SPECIAL POPULATIONS

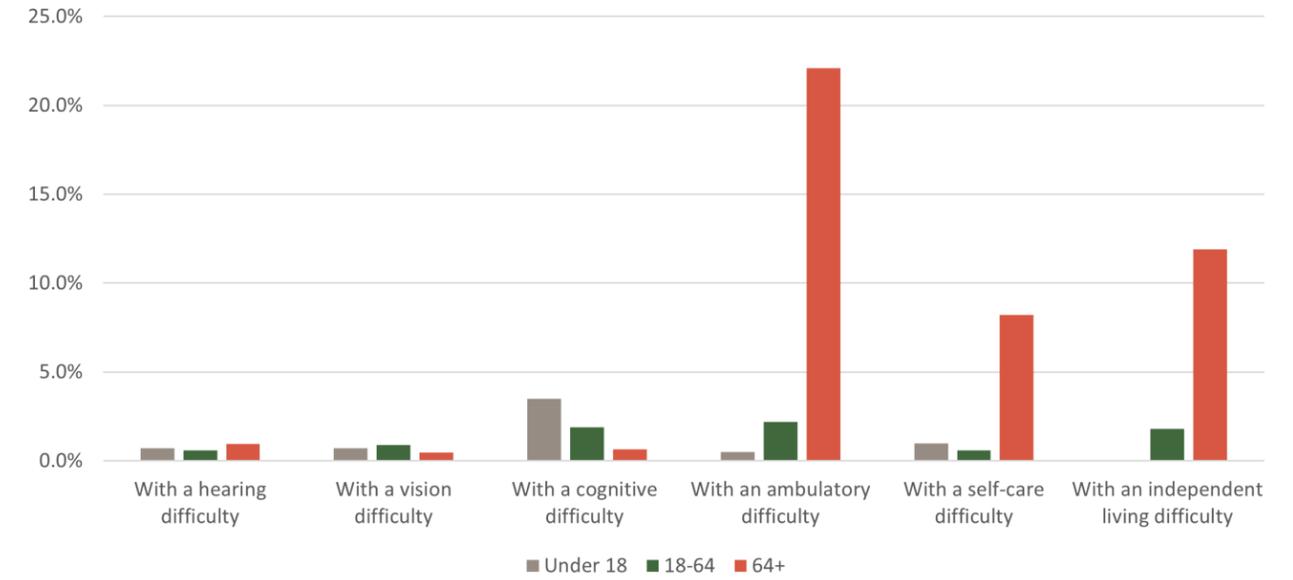


Figure 2.15 - Special Populations in the Town of Apex. (Source: 2019 American Community Survey)

TAPESTRY SEGMENTATION

Tapestry Segmentation is a demographic analysis methodology developed by ESRI to provide a fuller, more detailed description of America's neighborhoods that combines multiple demographic factors to identify unique consumer markets throughout the United States. Each of these tapestry segments, 67 in total, are meant to reflect shifts in established consumer markets and emergence of new markets due to population growth, demographic and socioeconomic change, and evolving consumer behavior.

The Tapestry Segmentation Analysis divides areas into distinct segments based on their socioeconomic and demographic composition. Neighborhoods with similar characteristics are grouped, and neighborhoods with divergent characteristics are separated into different segments.

The Tapestry Segmentation Analysis for the Town of Apex revealed ten Tapestry Segments in the community. The top five, which make up almost 85 percent of households, are highlighted and will be expanded upon below. The top ten, listed in order of prevalence among households, were:

- > Boomburbs (52.6 percent)
- > Up and Coming Families (13.7 percent)
- > Enterprising Professionals (7.5 percent)
- > Professional Pride (6.2 percent)
- > Bright Young Professionals (4.8 percent)
- > Green Acres (4.7 percent)
- > Savvy Suburbanites (3.7 percent)
- > Middleburg (2.8 percent)
- > Comfortable Empty Nesters (2.7 percent)
- > Workday Drive (1.3 percent)

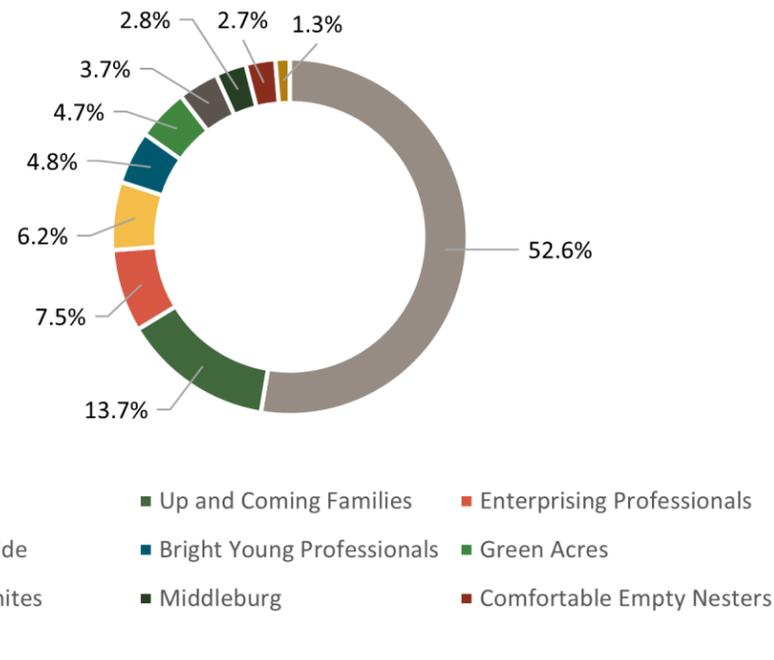


Figure 2.16 - Tapestry Segment groups in the Town of Apex. (Source: ESRI Tapestry Segmentation)

Tapestry Segmentation - Boomburbs

ESRI describes Boomburbs as a new growth market comprising “young professionals with families that have opted to trade up to the newest housing in the suburbs. This market is an affluent one but has a higher overall proportion of mortgages. This group is experiencing rapid growth and tends to be comprised of well-educated professionals with a running start on prosperity.” These individuals and neighborhoods are often suburban peripheries of larger metro areas and are overwhelmingly homeowners (84 percent). This group is majority white and has a median household income twice that of the United States. According to ERSI’s Market Profile, Boomburbs are technologically savvy, being well educated and affluent lifemode groups.² They enjoy gardening, and physical fitness is a priority for them, with gym memberships or home equipment ownership. Leisure includes a range of activities from sports such as hiking, bicycling, swimming, and golf, to visits to theme parks or water parks.

Tapestry Segmentation - Up and Coming Families

ESRI describes Up and Coming Families as a traditional market that is undergoing a transition to a “younger and more mobile [population] than the previous generation.” This market is one that was impacted by the recession (2008) but is rebounding. This group is experiencing rapid growth and is one of the fastest-growing markets in the country. These individuals and neighborhoods are often suburban peripheries and are primarily homeowners (74 percent) with a healthy population of renters (26 percent). This group is majority white but has greater representation of all other races surveyed races than the US per the diversity score. According to the Up-and-Coming Families’ life-mode description, this group finds leisure in family activities, movies at home, trips to theme parks or the zoo, and sports: golfing, weight lifting, and taking a jog or run.³

² https://downloads.esri.com/esri_content_doc/dbl/us/tapestry/segment3.pdf
³ https://downloads.esri.com/esri_content_doc/dbl/us/tapestry/segment27.pdf

Tapestry Segmentation - Enterprising Professionals

ESRI describes Enterprising Professionals as a young market primarily occupied by STEM professionals. This market is characterized by individuals who move frequently for their career and as such, choose to live in condos, townhomes and/or apartments. This group is fast-growing, and these individuals and neighborhoods are often lower density neighborhoods within large metro areas. Individuals are almost evenly split between owners and renters (51.2 percent owners versus 48.8 percent renters). This group is just above 50 percent white with a high population of individuals identifying as Asian and Pacific Islanders.⁴

Tapestry Segmentation - Professional Pride

ESRI describes the Professional Pride lifemode as well-educated career professionals that have prospered through the Great Recession and maintain upscale suburban lifestyles. This market is characterized by individuals who work long hours and often commute far to get to work. This group is financially savvy, and individuals have accumulated an average of 1.6 million dollars in net worth. Individuals are almost entirely homeowners (91.6 percent) with few renters (8.4 percent). This group is majority white (78.7 percent) with a sizeable Asian and Pacific Islander population (12.6 percent), but it is significantly less diverse than the US.⁵

Tapestry Segmentation - Bright Young Professionals

ESRI describes Bright Young Professionals as a young population of well-educated working professionals. This market is characterized by individuals who live in urban outskirts of large metropolitan areas and are much younger than in most markets, with more than 1 out of 3 households occupied by individuals under the age of 24. This group is earning income at about the same average as the United States overall and is more often renters (57.2 percent renters versus 42.8 percent owners). This group is primarily white (65.1 percent) with a sizeable Black population (16.6 percent), and it is slightly more diverse than the US.⁶

TAPESTRY SEGMENT	TAPESTRY SEGMENT DIVERSITY SCORE	UNITED STATES DIVERSITY SCORE
Boomburbs	63.2	64.0
Up and Coming Families	73.9	
Enterprising Professionals	73.0	
Professional Pride	44.5	
Bright Young Professionals	67.5	

Figure 2.17 - Diversity Score

⁴ http://downloads.esri.com/esri_content_doc/dbl/us/tapestry/segment9.pdf
⁵ http://downloads.esri.com/esri_content_doc/dbl/us/tapestry/segment2.pdf
⁶ http://downloads.esri.com/esri_content_doc/dbl/us/tapestry/segment35.pdf



TRENDS IN PARKS + RECREATION

The field of parks and recreation continually updates best practices and integrates new policies and technologies as they become available. A forward-looking parks and recreation department will be aware of new and emerging recreation trends and can anticipate the impacts broader trends will have on their departmental operations. This plan looks at local and national recreation and activity trends, high-level emerging trends in the field of parks and recreation, sustainability trends, and impacts of COVID-19 – all of which are expected to have significant impact on Apex’s parks, recreation, and cultural resources department during the next 10 years.

Methodology

Local recreation trends are sourced from ESRI’s Market Potential Index (MPI). The MPI is a measure that compares demand for a product or service within a pre-determined geographic area to the national demand for that product or service. Demand for a recreational activity is measured based on whether an individual has participated in a certain activity within the past 12 months. An MPI of more than 100 indicates that the local demand for a product is higher than the national average, while an MPI of less than 100 indicates that the local demand is lower than the national average. The products or services included within this comparison are specific to parks and recreation activities, though the products or services are not necessarily indicative of the Town’s facility or program offerings.

National recreation trends and high-level emerging trends are sourced from a variety of industry standard publications including the Sports & Fitness Industry Association’s (SFIA) Sports, Fitness & Recreational Activities Topline Participation Report. The report was utilized in evaluating the following trends:

- › National Sport and Fitness Participatory Trends
- › Core versus Casual Participation Trends
- › Income Disparity

The 2021 SFIA report is based on findings from surveys carried out in 2020 by the Physical Activity Council (PAC). A statistically representative sample size of 18,000 completed interviews is considered to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.32 percentage points at a 95 percent confidence interval. 29.5%

Using a weighting technique, survey results are applied to the total US population figure of 303,971,652 people (age six and older). The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the US.

SOURCES FOR RECREATIONAL TRENDS

- › Local Recreation Trends
 - ESRI Market Potential Index
- › National Recreation Trends
 - Sport & Fitness Industry Association (SFIA)
 - National Recreation and Parks Association (NRPA)
- › Equity Trends
 - NRPA
 - City Parks Alliance
- › Intergenerational Recreation Trends
 - NRPA
- › Sustainability Trends
 - NRPA
- › Urban Agriculture Trends
 - NRPA
- › COVID-19 Pandemic and Parks
 - Outdoor Fitness
 - NC State University
 - Trust for Public Land

Figure 2.18 - Data Sources for Recreation Trends

In addition to overall participation rates, SFIA categorizes active participants as either core or casual participants based on frequency. Core participants have higher participatory frequency than casual participants. The thresholds that define casual versus core participation may vary based on the nature of each individual activity. For instance, core participants engage in most fitness and recreational activities more than 50 times per year, while for sports, the threshold for core participation is typically 13 times per year. In each activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than casual participants. This may also explain why activities with more core participants tend to experience less pattern shifts in participation rates than those with larger groups of casual participants. Lastly, SFIA also tracks the multi-year data documenting the sport/ activity participation by income levels and calculates the Income Disparity Index which is the difference between the lowest income bracket and highest income bracket.

Local Recreation Trends

Local recreation trends were derived from ESRI’s Market Potential Index (MPI) profile for the town. The table below lists the parks and recreation activities most popular with Apex residents, as indicated by having the highest percentage of participants and highest MPI values. This data is derived from spending associated with sports and sports equipment, and captures participation in public leagues, private leagues, and individual participation. Most activities can be done individually and with little specialized equipment. Walking, jogging, running, and biking are activities that residents can participate in anywhere, though they may choose to pursue these activities in public parks and greenways. Swimming, hiking, bowling, and golf are activities that can be pursued at a specific location and may require additional equipment and resources. The popularity of these activities suggests that the Town should continue to offer opportunities for residents to participate in these activities and invest resources to enhance those offerings.

WALKING FOR EXERCISE	SWIMMING	HIKING	JOGGING RUNNING	BICYCLING (ROAD)	BOWLING	GOLF
29.5%	20.0%	16.2%	16.2%	12.0%	11.3%	11.1%
(MPI:116)	(MPI: 127)	(MPI:127)	(MPI: 148)	(MPI: 120)	(MPI:120)	(MPI: 133)

Figure 2.19 - Local Recreation Trends

The MPI analysis for all of the top 7 recreation activities in the Town indicate that not only are these activities very popular in Apex, but they are more popular in Apex than they are nationwide. In fact, of all the recreation activities analyzed in ESRI’s MPI, except for freshwater fishing, hunting, motorcycling, and Pilates, have MPI values over 100, which indicates that, generally, recreational activities are more popular in the Town than they are in the country at large.

National Recreation Trends

National changes in the popularity of recreation activities provide additional context for activities experiencing increasing or decreasing popularity and give an overview of activity levels for individuals. These national trends supplement local trends and can serve to anticipate forthcoming trends at the local level. The popularity of activities has implications for future planning for the Department’s programs and facilities. National trends also provide insight as to whether changes within a given year at the local level are isolated trends or part of a larger shift in preference.



According to the Sports, Fitness & Recreational Activities Topline Participation Report, the five activities experiencing the largest growth nationally in the last year are camping, tennis, birdwatching, hiking, and RV camping.⁷

All of the top 25 activities facing decline are indoor activities, requiring a specialized facility and/or equipment with the exception of baseball. This is likely due to closure of facilities during the COVID-19 pandemic. The sharp decrease in the past year alone appears likely to be the contributing factor for a three-year average decline.

	CAMPING	TENNIS	BIRDWATCHING	HIKING	RV CAMPING
1-year change	28%	22.4%	18.8%	16.3%	15.5%
3-year change	11.7%	7.5%	7.7%	8.9%	3.7%

Figure 2.21 - Top Recreation Activities



Figure 2.20 - Tennis Courts (Source: Places2play.org)

When looking at a 3-year average, the level of decline for these activities are much less significant. Similarly, the 1-year increases in hiking, camping and tennis are better viewed within the context of their 3-year average change which is trending upward but not as significantly as the 1-year change. This can likely be attributed to the fact that these are all outdoor activities with minimal interaction with large groups of individuals.

Nationally, the top five fastest growing sports/activities according to the same report were skateboarding, surfing, camping, tennis, and pickleball.

	SKATEBOARDING	SURFING	CAMPING	TENNIS	PICKLEBALL
1-year change	34.2%	28.2%	28%	22.4%	21.3%

Figure 2.23- National Trends

The pandemic has affected the overall frequency of Americans participating in fitness and sports. In 2020, 46.3 percent of active Americans participated at Core level, which is a slight increase from the 2019 percentage (+/-45%) and represented a trend reversal where Casual participation has been on the rise since 2014 (+/-50% in 2014 and +/- 52% in 2020). The SFIA report suggests that the COVID pandemic was the cause for radical change in lifestyle where "COVID-acceptable" activities such as going on a walk, family camping trip, live stream fitness classes, or playing tennis and golf were on rise.

The 2021 SFIA data shows that physical activity rates are correlated to household income, with higher rates of income associated with higher activity rates. The income disparity index (IDI) climbed up since 2015 (1.40) to 2018 (1.59) and reduced back again in 2019 (1.53) and 2020 (1.46). In 2020, the highest income disparity against sport/ activity participation was found with water sports, winter sports, and racquet sports, which shows that the developing affordable programs could bridge the access gap for lower income populations.

Recreation Management Magazine publishes the state of the industry report annually. According to the 2021 report, the parks and recreation agencies across the country reported that the most common facilities found in their parks system remain playgrounds, park shelters, trails, open spaces such as natural areas and gardens, sports courts, sports fields, concession areas, and restrooms.⁸ The top three most planned additions to facilities for year 2021 are: outdoor fitness areas and fitness trails, splash play areas, and walking and hiking trails. From a programmatic standpoint, it comes as no surprise that the biggest change being seen in the industry has been the development and implementation of online programming, followed by conversion of indoor programming to outdoors, because of the pandemic. Other program additions include educational support for schoolchildren and childcare for essential workers.



Figure 2.22 - Camping (Source: NC State Parks)

7 Sports and Fitness Industry Association. State of the Industry. Silver Spring, MD: SFIA, 2021.

8 Recreation Management. "2022 Trends in Parks & Recreation." Recreation Management, 2021. June 1. https://rec-management.com/feature_print.php?fid=202106FE03.



The National Recreation and Parks Association (NRPA) also issues an annual trends report. The 2022 report includes several of the noted trends are rooted in the concept of Parks as Infrastructure.⁹ With the passage of the Great American Outdoors Act in 2020 that permanently funds the Land and Water Conservation Act at \$900 million annually, and the recent passage of long-sought infrastructure funding in the INVEST in America Act, there will be significant funding opportunities available for land acquisition, park and recreation planning, and infrastructure maintenance, repair, and development.

Two national trends of note are increased integration of technology and a decline in community-based youth sports participation. On technology, NRPA notes the increased use of drones for horticultural maintenance, a transition to electric maintenance vehicles and mowers, and a long-term future use of pedestrian robots using public paths in parks for deliveries and other services. NRPA also provides commentary on a steady decline in youth participation in recreation that has been happening since the late 2000s and has been exacerbated by the COVID-19 pandemic. Citing multiple academic studies, NRPA reports that youth participation in sports decreased 7 percent between 2008 and 2018 and that most kids between the age of 6 and 12 playing a team sport had quit by age 11. Since the onset of the pandemic, 30 percent of youth have reported that they are no longer interested in picking their pre-pandemic team sports back up. NRPA encourages parks and recreation organizations to implement sports sampling programs, which allow youth participants to try a variety of sports to find something that aligns with their interest and skills. In addition, NRPA sees a return to community-based sports in the future and that parks and recreation agencies are the most ideally positioned to be multi-sports providers.

INTERGENERATIONAL RECREATION TRENDS

Children And Nature Programming

The Cities Connecting Children to Nature (CCCN) initiative offers local officials guidance for establishing new connections between children and nature.¹⁰ The Children and Nature Network and other organizations have been pushing efforts to provide the benefits of nature for all children. Parks and open spaces provide the easy opportunity to highlight natural resources and enhance access to these areas. Nature-based programming, after-school and summer camp programming in natural areas, and educational programming (to raise environmental awareness) are some of the strategies that are on the rise across the country.



Figure 2.24 - Children in Nature Program
credit: www.metroparkstacoma.org

⁹ Doles, Richard J. "Top Trends in Parks and Recreation for 2022." National Recreation and Parks Association, 2021. December 16. <https://www.nrpa.org/parks-recreation-magazine/2022/january/top-trends-in-parks-and-recreation-for-2022/>.

¹⁰ "Cities Connecting Children to Nature, A municipal Action Guide", CCCN-Municipal-Action-Guide.pdf (cityparksalliance.org)

Adult And Senior Programming

Many parks and recreation departments have expanded to provide fitness, athletic, and enrichment programming for adults and seniors. NRPA's Healthy Aging in Parks¹¹ campaign was developed to improve and maintain the health and wellbeing of older adults through parks and recreation. It focuses on preserving the health, independence, and social connections of older adults. with the following strategies:

- Chronic Disease Prevention and Management: Dissemination and increased sustainable supports for evidence-based chronic disease prevention and management programs
- Food Security: Improved access to healthy foods
- Social Isolation: Increased opportunities to establish strong and healthy social connections



Figure 2.25 - Adult and Senior Programming
Credit: www.burlingtonnc.gov

Additional ongoing nation-wide initiatives to generate multi-level benefits of parks and recreation are summarized in the table below.

INITIATIVE	DESCRIPTION
 	<p>Parks are free and open to the public and serve as important locations for people to play, socialize, and gather as a community. Community members are only able to access free or low-cost parks and programs if they can afford the trip to get there. Ensuring an equitable distribution of parks and amenities throughout a geographic area means residents truly have affordable access to parks and programs.¹²</p> <p>The 10 Minute Walk campaign is working to "ensure there's a great park within a 10-minute walk of every person, in every neighborhood, in every city across America." Seven North Carolina mayors have signed the pledge according to the Trust for Public Land.</p>

¹¹ "Healthy Aging in Parks"; <https://www.nrpa.org/our-work/partnerships/initiatives/healthy-aging-in-parks/healthy-aging-in-parks-about/>

¹² <https://www.10minutewalk.org/#Home>



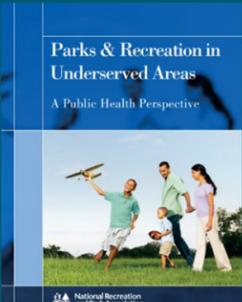
INITIATIVE	DESCRIPTION			
 <p>93%¹³</p> <p>Percentage of Americans looking to local governments to increase affordable out-of-school time programming at their park and recreation agency</p>	<p>Parks and recreation departments frequently provide day programs and camps for children at below-market or discounted rates. This service provides an affordable alternative for families who must find childcare when school is out of session.</p> <p>A recent study from the National Recreation and Parks Association found “93 percent of Americans believe providing affordable out-of-school time programs at local parks, recreation centers and libraries to families of all income levels should be a goal of their local government. Currently, 93 percent of park and recreation agencies nationwide administer or manage out-of-school time programs.”</p> <p>Day programs and camps can benefit all children but are especially important for low-income families with few other options for daytime childcare options.</p>			
	<p>Parks and Recreation in Underserved Areas: A Public Health Perspective¹⁴ states, “Several studies have documented that while parks and recreational facilities are available throughout the United States, there are several additional factors that affect park use and physical activity levels.” Factors include:</p>			
<p>PARK ACCESS</p> <p>Easy park access is associated with increased park use. Park visits are more frequent and physical activity levels are higher.</p>	<p>PARK DISTRIBUTION</p> <p>Disparities in park distribution are particularly evident in areas with low-income and racial/ethnic populations.</p>	<p>PARK FACILITIES</p> <p>Within parks, there are certain types of facilities that encourage higher levels of physical activity, such as trails and playgrounds.</p>	<p>PARK CONDITIONS</p> <p>Park facilities that are consistently well maintained, aesthetically appealing, and safe have increased public use and physical activity.</p>	

Figure 2.26 - National Recreation Research Summary

DIVERSITY, EQUITY, AND INCLUSION TRENDS

The National Recreation and Parks Association (NRPA) recognizes that equal access to parks is a right, not a privilege.¹⁵ Their position statement on social equity states, “Our nation’s public parks and recreation services should be equally accessible and available to all people regardless of income level, ethnicity, gender, ability, or age. Social equity is a critical responsibility borne by every public park and recreation agency and the professionals that operate them.” According to NRPA, “designing programming to meet the needs of multicultural, racial, or ethnic communities supports the well-being of historically marginalized and vulnerable groups.” Other programs around the nation have offered community gardens, health and wellness programs, and budget and personal finance training for multicultural, racial, and ethnic communities, in addition to a high-quality park system that is equitably distributed across a community. The National Recreation and Parks Association (NRPA) acknowledges that parks and recreation providers can be at the forefront of addressing racial equity due to their unique role as a public service provider of many quality-of-life programs and amenities. The NRPA recommends the following considerations for addressing racial equity in parks and recreation:

- Normalizing conversations about race is the only way to develop effective strategies for racial equity. One of the biggest challenges is the general discomfort many people experience in talking about race. This is a critical hurdle to overcome. Avoiding conversations about race means there is a greater likelihood that organizations will not develop appropriate strategies to address institutional and structural racism.

EXAMPLES OF INCLUSIVE PROGRAMS

- Volunteer or employment activities including work opportunities at local parks and special events
- Health and wellness programs such as cooking and nutrition programs
- Field trips
- Special Olympics or Paralympics
- Therapy and mentoring services such as therapy swimming, art/ music therapy
- Technology training



Figure 2.27 - Parks and Rec Inclusion Report

13 <https://www.nrpa.org/publications-research/park-pulse/park-pulse-survey-affordable-out-of-school-time-programming/>

14 https://www.nrpa.org/uploaded_files/nrpa.org/Publications_and_Research/Research/Papers/Parks-Rec-Underserved-Areas.pdf

15 Kellogg, Michelle, and Julie Nelson. “Racial Equity in Parks and Recreation.” National Recreation and Parks Association, 2015. November 30. <https://www.nrpa.org/parks-recreation-magazine/2015/december/racial-equity-in-parks-and-recreation/>.

16 Rouse, David. “Social Equity, Parks and Gentrification.” National Recreation and Parks Association, 2018. July 26. <https://www.nrpa.org/parks-recreation-magazine/2018/july/social-equity-parks-and-gentrification/>.



- Behavior drives attitude. It is a common misconception that attitude drives behavior and expecting people to “understand” racism can lead to desired behavioral changes. However, changing behavior changes understanding. Providing common understanding of racial equity terminology and tools to use helps employees develop an increased understanding of institutional and structural racism.
- Equity is a process. Embedding racial equity in the core operations of an organization takes continual learning and practice. It should be considered as an ongoing process of delivering business and not relegated to a checkbox or an additional step to an existing process.



▲ Figure 2.28- Butterfly Plantings

NRPA first published its Inclusion Report in 2018, addressing the challenges for people with different backgrounds to access high-quality parks and recreation programming. NRPA defines inclusion as removing barriers, both physical and theoretical, so that all people have an equal opportunity to enjoy the benefits of parks and recreation¹⁷ and have made formal commitment through “parks for inclusion” pledge. Parks for Inclusion supports built environment enhancements, model policy development, and best practices for program implementation to increase access to health opportunities for the following populations:

- Those with physical and cognitive disabilities
- The LGBTQ community
- Racial and ethnic minorities and new Americans

Two in five parks and recreation agencies have adopted formal inclusion policy to maintain consistent guidelines and implementation standard across the agency. Examples of programming for individuals with physical and cognitive disabilities include physical activity programming, volunteer and employment activities, and health and wellness programs.

Acknowledgment of demographic diversity through celebratory programs such as heritage and holiday celebrations, culturally sensitive program hours, and health and wellness programs that reflect cultural and ethnic practices helps to bring the community together. Programs and activities geared towards diversity and inclusion include community gardens, women-only programs such as dedicated swimming pool and gym hours, language training, technology training, financial training, and health and wellness programs such as culinary skills and nutrition classes.

ENVIRONMENTAL SUSTAINABILITY TRENDS

Parklands in dense urban areas are credited for reducing heat island effects through tree canopy coverage and for helping mitigate stormwater runoff by allowing infiltration into previous land. Increasingly, parklands have been recognized as a vital component of infrastructure development strategy to help mitigate the impacts of climate change.

17 National Recreation and Parks Association. “Parks and Recreation Inclusion Report,” 2018. <https://www.nrpa.org/contentassets/e386270247644310b06960be9e9986a9/park-recreation-inclusion-report.pdf>

According to a survey of parks and recreation organizations conducted by the NRPA, nearly 50 percent of parks and recreation agencies had adopted a Sustainability Plan or would go through the process of developing and adopting one in the near future.¹⁸ The trends seen in this report relating to sustainability show that most agencies contributed to city, county and/or state sustainability goals by providing healthy outdoor activities for residents, protecting and managing wildlife and wildlife habitat, responsibly managing natural land, reducing landfill waste, practicing environmentally friendly design such as green infrastructure, and fostering sustainability through public education and engagement.



▲ Figure 2.29 - Nature Park Stormwater Feature

The NRPA’s top trends of 2022 predicted that most new parks will be designed with environmental resiliency in mind. Parks are and will continue to be seen increasingly as landscapes providing a multitude of benefits including stormwater management, protection against flooding, mitigation of rising temperatures, and promotion of environmental and social resiliency. NRPA also predicted that, in an effort to address extreme heat and the emptying out of strip malls and big-box stores, park and recreation projects will increasingly include transformation of these vacant parcels into recreation amenities. Assessment of fallow land and highest and best use of existing developed land will be priorities for agencies looking to expand their impact and geographic presence and distribution. An additional noted trend is an increasing view of parks as critical infrastructure for the environment, the economy, and social and physical well-being.

URBAN AGRICULTURE TRENDS

A growing trend nationwide and globally, in line with the increased view of parks as infrastructure, is the view of parks as food resources. There is a growing consensus around the viability of parks as a food resource and the important role parks and recreation agencies can have in communities as providers of healthy and nutritious food. Nationwide, according to NRPA, park and recreation professionals work to provide access to healthy food through a variety of venues¹⁹:

- Summer Camps (82 percent)
- Nutrition Programs (57 percent)
- After-School Programs (56 percent)
- Community Gardens (46 percent)
- Farmers Markets (24 percent)
- Community Supported Agriculture Systems²⁰

18 National Recreation and Parks Association. “Park and Recreation Sustainability Practices,” 2017. <https://www.nrpa.org/contentassets/f768428a39aa4035ae55b2aaff372617/sustainability-survey-report.pdf>.

19 National Recreation and Parks Association. “Parks and Recreation: A Link to Healthy Food,” 2020. <https://www.nrpa.org/parks-recreation-magazine/2020/february/parks-and-recreation-a-link-to-healthy-food/>.

20 <https://www.nytimes.com/2014/11/07/giving/what-the-doctor-ordered-urban-farming-.html>

▲ Figure 2.29 - Nature Park Stormwater Feature



COVID-19 PANDEMIC AND PARKS

The COVID-19 pandemic has simultaneously put strain on parks and recreation organizations and highlighted their importance to both the physical and mental health of their users. For the better part of the pandemic, the outdoors has been the safest place for social gatherings and individual recreation. At times, it has been the only option for fitness and recreation due to the shuttering of indoor gyms and recreation facilities. In 2021, Outdoor Industry Association (OIA) commissioned one-time special report from research partner NAXION to share exclusive insights about Americans' engagement in outdoor activities amid the COVID-19 pandemic.²¹ The special report examines demographics and psychographics of the new outdoor participant – defined as someone who participated in an outdoor activity for the first time during the pandemic or after a significant lapse. The key findings from this report suggest that those who participated in an outdoor activity for the first time alone did so close to home and chose an activity with a low barrier to entry (e.g., walking, running, biking, hiking, etc.). Compared to results from 2019, the 2020 participants were more diverse from gender, age, ethnicity, and income perspective.



Figure 2.30 - COVID Pandemic + Parks
Credit: www.tpl.org

According to the 2021 outdoor participation trends report by OIA, in 2020, 53 percent of Americans participated in an outdoor recreation activity at least once, which is the highest participation rate on record.²² The report cautions, however, that this growth is not guaranteed to be sustained in a post-pandemic world, with one-quarter of new participants saying they did not want to return to their outdoor recreation activities. Additionally, the overall number of times that participants engaged in outdoor recreation continued to decline as it has in years past. Engagement with individuals participating in these activities for the first time, especially those open to sustaining outdoor recreation post-pandemic, could reveal programmatic and facility desires from that population that would keep them as users of the system.

Researchers at North Carolina State University led two studies examining how a decrease in outdoor activities and park use by teens and young adults led to a decline in mental health and well-being.²³ These studies found that 54 percent of college students reduced their park use during the pandemic. They also found that increased worry about contracting COVID-19 was marked by a further decline in parks use, particularly among students identifying as Asian or Black. Fifty-two percent of students self-reported a decline in mental health, nearly matching the percentage of students who had reduced their outdoor activities due to the pandemic. On the other hand, the studies found less overall distress attributed to COVID-19 among students who increased their park and outdoor use during the pandemic. These studies emphasize the important role of parks and recreation agencies in improving mental health and wellbeing for younger individuals.

21 Outdoor Industry Association. "2021 Outdoor Participation Trends Report", Outdoor Industry Association, 2021

22 Outdoor Industry Association. "The New Outdoor Participant (COVID and Beyond)," Outdoor Industry Association, March, 2021. <https://outdoorindustry.org/resource/2021-special-report-new-outdoor-participant-covid-beyond/>

23 Larson, Lincoln, and et al. "Greenspace and Park Use Associated with Less Emotional Distress among College Students in the United States during the COVID-19 Pandemic." Environmental Research. 204 (Part D), 2022. https://www.sciencedirect.com/science/article/pii/S0013935121016686?casa_token=EZ-XY76jqRwAAAAA:ZtuQLp6m5UEl6wlb5Pv7JmhN4utLcJKslxed_pN40F8j-1gpM6e-WFb2ycgdgpGN85dF_0S6lg.

The following excerpt is derived from the 2020 Trust for Public Land special report: **Parks and the Pandemic**. The report highlights the following challenges and changes as they are affecting the parks systems.

- › Health: Parks and open spaces have become critical resources for all the physical and mental health benefits they provide. The pandemic has resulted in closings of restaurants, bars, malls, etc. where people socialize, and parks and open spaces are helping fill that gap while also helping communities deal with the trauma and stress that comes with a global health crisis. The report also notes that the pandemic has revealed a significant gap in the nation's poor neighborhoods which lack access to the quality green spaces, thus depriving them of the health benefits.
- › Usage: As businesses and non-essential services have closed across the nation, people have found respite in close-to-home neighborhood parks, open spaces, and greenway trails as a way to stay physically active and meet other people while maintaining the 'social distance'. Parks and greenway trails are seeing unprecedented high levels of usage, proving their importance in this health crisis. This has also led to overwhelmed parks and recreation systems, and many communities have had to come up with innovative ways to encourage people to maintain distance and use open spaces in accordance with CDC guidelines. Some of the strategies included markings for people to keep distance, educational signs, one-way loops for greenway trails, opening athletic fields for walking and passive recreation activities, and voluntary sign-ins for people to use spaces on certain days of the week.
- › Policy: Across the country, the pandemic has led parks departments to consider a range of policy changes by closing off amenities, athletic programs, and facilities that result in large gatherings. While communities have maintained access to open spaces, portable toilets, restrooms, drinking fountains have been shut down. In major cities, the problem of equitable access became apparent when parking lots were closed to manage heavy traffic in parks, which in turn created a barrier for people not within the walking distance of the parks.
- › Investment: Exacerbated usage of parks and open spaces has underscored the need for parks and recreation investment as essential infrastructure investment and leverage the momentum of communities' interest to be outdoors and focused on health benefits. Cities and towns across the nation are facing the financial challenges of decreased revenue, employment loss, and budget cuts. Elected officials and decision makers need to realize the importance of parks and recreation as an essential service in this pandemic and ensure a steady investment to continue offering the quality service to their communities.
- › Future: The Trust for Public Land report also highlights that the pandemic has called attention to the fact that access to the outdoors is considered a privilege when it should be a right. With the data to pinpoint where parks are most needed, we can address equality challenges across communities. Experts in the field are suggesting that this is the crucial time to continue supporting the operational needs of parks to maintain their high quality, especially in the underserved areas where there is a higher chance of them falling victim to antisocial activities.

SUMMARY OF FINDINGS

The Town of Apex is experiencing above-average population growth with an annual growth rate nearly three times as high as North Carolina’s and nearly four times as high as the United States’. Population growth, driven by migration, is anticipated to shift the overall demographic composition of the Town in the next 10 years. Anticipated changes include:

- › An aging population where the proportion of adults over the age of 65 will increase by 2.8 percent to a total of 12.4 percent by 2031.
- › A population whose growth in individuals under the age of 65 is almost entirely driven by growth in the 25- to 34-year-old segment.
- › A more diverse population where individuals identifying as White Alone will represent 68.5 percent of the population, compared to 72.8 percent currently. This change is driven by an increase in the population identifying as Asian Alone from 11.4 percent to 14 percent.
- › An increasingly wealthy population where households with income over \$100,000 are experiencing a positive annual growth rate.
- › A population where most of the migration in recent years is coming from either the same or other Metropolitan Statistical Areas (MSA) with most coming from the same MSA.

As Apex’s population grows and changes in the coming decade, the community’s recreation needs will grow and change. The demographics findings combined with the national and local recreation trends will form the basis for informing the new Parks, Recreation, and Open Space Master Plan recommendations. The demographic shifts will impact the future recreation trends in Apex in following ways:

- › The overall rapid population growth indicates a need for expanding parks and recreation services and suggests a growing tax base to support that work.
- › The population segmentation projects suggest the need for adult and youth athletics as well as family-oriented and intergenerational programming for growing active adult community. All parks and facilities will need to feature amenities and design elements that are inclusive to all abilities, age, ethnicity, and race.
- › The area’s racial demographics will change during the next ten years. There is a need for equity, diversity, and inclusion efforts to ensure equitable provision of parks, facilities, amenities, and programs.
- › Apex has largest proportion of highly educated population. This population segment may be looking for new and innovative programs and facilities they have experienced elsewhere. The town will have to balance the needs of all residents by providing programs that generate revenue, support the cost of offerings, and essential programs that minimize the barrier to participate.
- › The already high and continually increasing household income level indicate the ability to pay for parks and recreation services. Regardless of rising income for some community members, residents with lower incomes must still have affordable or no-cost access to parks and recreation services.
- › Several of the emerging trends in parks and recreation include environmental, economic, and social benefits of parks and will need to be contextualized for the town’s parks system as essential infrastructure investment.
- › In the aftermath of COVID-19, there is an opportunity to turn casual users of parks and recreation facilities who increased their use of such facilities during the pandemic into core users who use facilities long-term. The innovative ways of conducting recreation programs in socially distanced and outdoor settings is a trend to be monitored as the world is coming out of the impact of the pandemic.

