



Market Analysis

INTRODUCTION

Platte County is projected to grow by approximately 20,000 people in the next 20 years. This growth will result in increased demands for parks and facilities provided by the Parks and Recreation Department that is related to demographic characteristics such as age, ethnicity, household income, and education.

Information is also provided below which benchmarks Platte County with other peer Missouri counties regarding their current level of service for per capita expenditures for all parks and services, acres of parks, miles of trails, sources of funding, etc.



MARKET ANALYSIS: POPULATION TRENDS

	1990	2000	2006	2020	% Change 1990-2000	% Change 2000-2006	% Change 2006-2020
Missouri	5,117,073	5,595,211	5,842,713	6,199,882	9.3%	4.4%	6.1%
Platte County	57,867	73,781	83,061	104,054	27.5%	12.6%	25.3%
Jackson County	633,232	654,880	664,078	690,999	3.4%	1.4%	4.1%
Buchanan County	83,083	85,998	84,955	-	3.5%	-1.2%	-
Clay County	153,411	184,066	206,957	239,606	20.0%	12.4%	15.8%
Clinton County	16,595	18,979	20,671	-	14.4%	8.9%	-

Sources: Mid America Regional Council – Metro Dataline. Last Update: Feb. 10, 2006.
 U.S. Census Bureau, Population Division, Interim State Population Projections, 2005.
 Table A1: Interim Projections of the Total Population for the United States and States: April 1, 2000 to July 1, 2030.
 Internet Release Date: April 21, 2005.

Observations

Over the past 16 years, Platte County has grown at a much higher rate than the counties near it and the state of Missouri as a whole. Based on its recent growth trends, its total population is expected to exceed 104,000 by 2020.

Implications

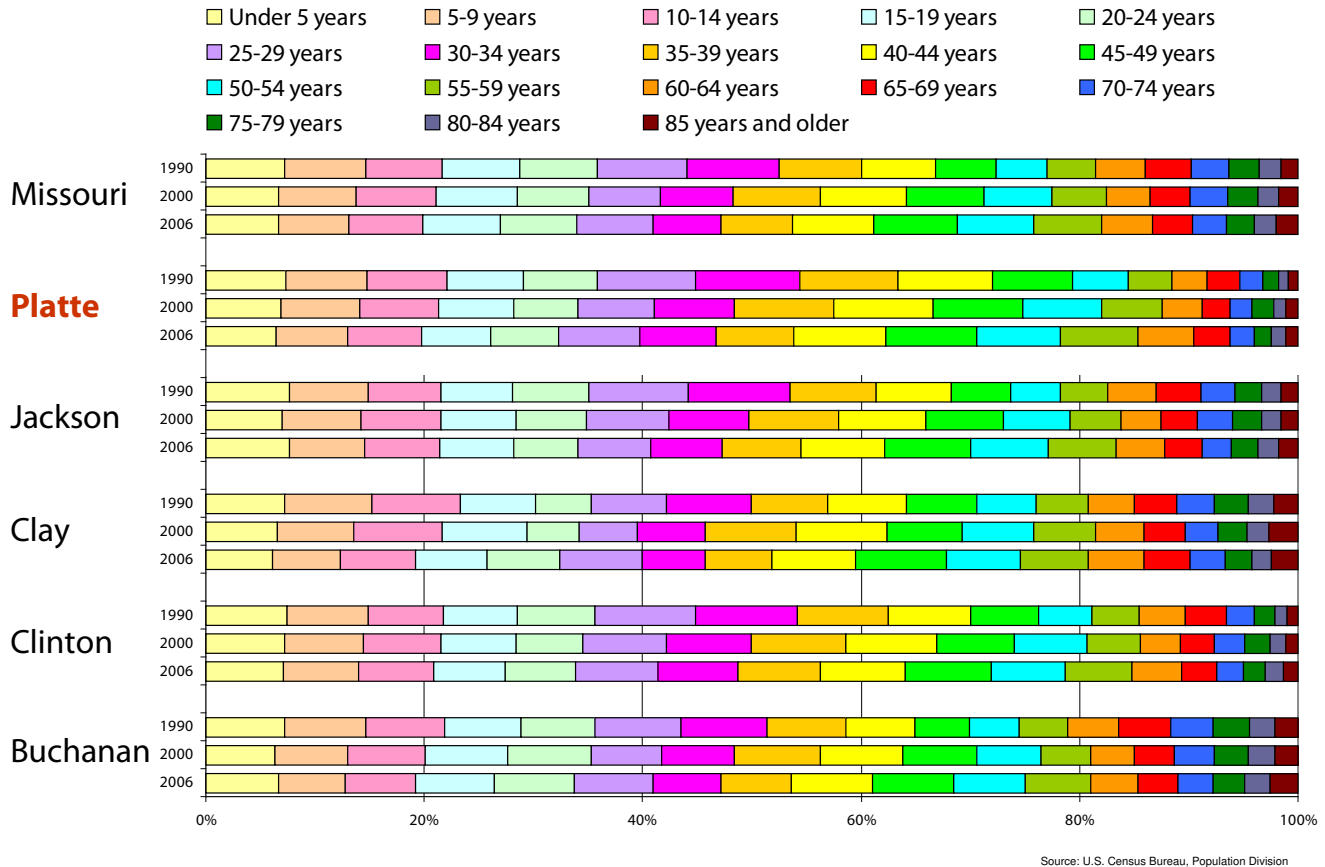
- Population growth will place an increased demand on existing facilities and programs.
- Platte County can expect to see increased use of existing facilities as well as increased demand for new ones.
- New facilities will need to be strategically located in areas of high population growth to meet new and previously unaddressed demands.
- Population growth will increase the demand for land, which will simultaneously reduce the amount of available land and drive up costs for land acquisition. As a result, future park land acquisition may become increasingly difficult.
- Platte County can anticipate greater demands on its natural resources and clean water.



Market Analysis



MARKET ANALYSIS: POPULATION BY AGE



Observations

With regard to age, Platte County's age distribution is similar to the surrounding areas and has been historically. As the graph shows, the percentage of the population 45-59 years old in these counties has increased since 1990, while the percentage of younger people in the counties has decreased slightly and the percentage over 65 has remained almost the same for the same period of time.

Implications

Much of the research regarding age preferences for parks and recreation has been done by Texas A & M University for activities that can be offered in an outdoor setting. Nonetheless, their research provides hints about what different age groups might prefer in Platte County.

Older Adults

- By 2030, 20% of the population is likely to be over age 65.
- Older adults in this era will be characterized as healthier, more active, and longer living than previous generations. Their activity and facility preferences





Market Analysis

will not be much different than younger age groups; however, activities will need to go at a slower pace for this age group and facilities may be desired at slightly different times than the younger age group.

- Use of parks and participation in outdoor recreation tends to go down with age.
- Older adults are more likely to cite personal constraints (fear of crime, lack of companions and family members and/or self are in poor health) as factors which limit their use of outdoor recreation facilities.
- Perception of park safety is enhanced by lighted park areas, accessible trails, and visible park rangers.
- Older women feel more secure in groups and may be attracted to parks to participate in interpretive programs, walking clubs or other group related activities.
- We need to understand the needs and interests of an aging population and those factors that stymie participation in later life.

Younger Adults

Younger adults are far more likely to cite information and access constraints (parks and recreation areas are too far away) and time constraints.

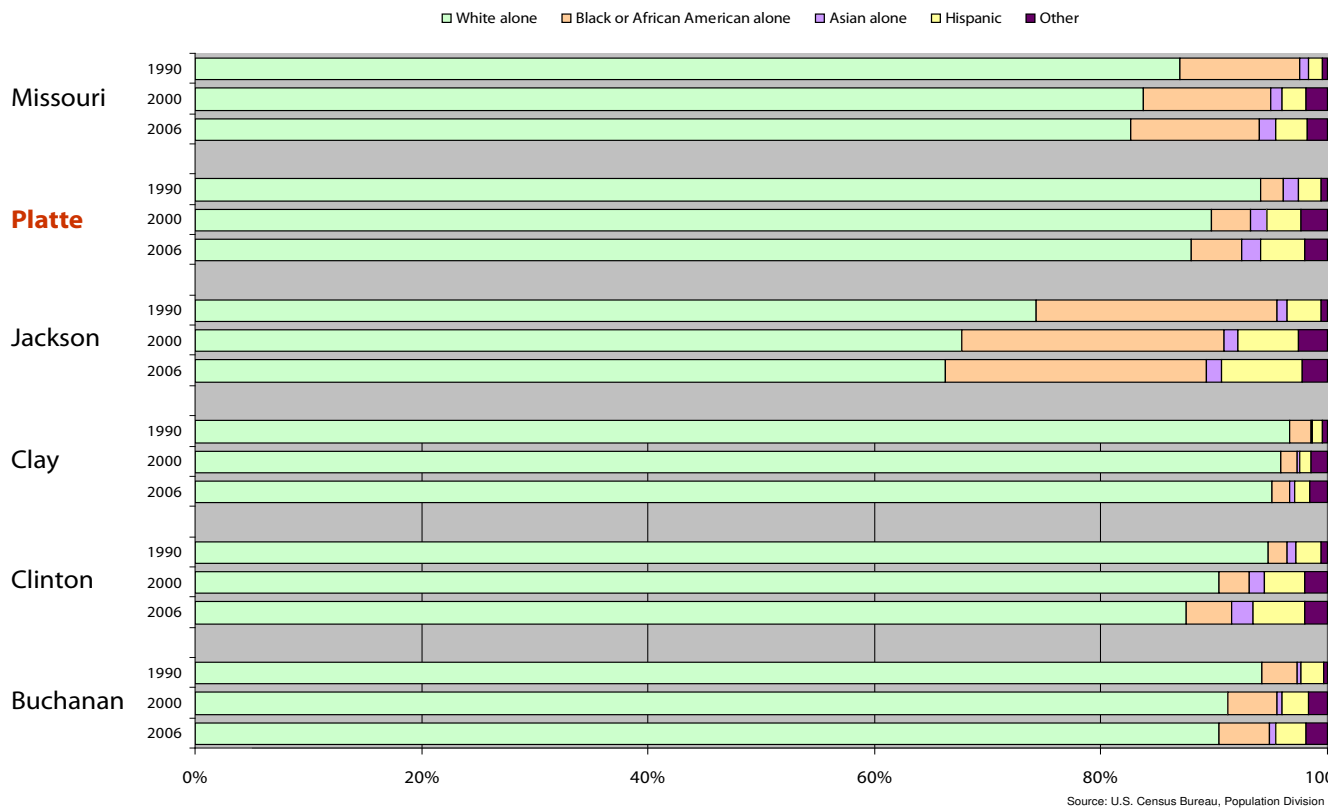
- Other providers tug at the discretionary time of younger adults and include television and the media.
- Platte County and its partners can attract more young adults to activities by improving and expanding opportunities to make advanced reservations so patrons can use time more precisely.
- Platte County and its partners must provide shorter and more self-directed opportunities. For example, ski areas, amusement parks and golf courses now provide half day tickets or nine hole rounds of golf in recognition of the time constraints faced by many young adults.
- Platte County and its partners can attract more young adults to activities and facilities by providing complete information concerning time requirements.



Market Analysis



MARKET ANALYSIS: POPULATION BY ETHNICITY



Observations

The population in Platte County is greater than 90% white. The Hispanic population in Platte County is growing rapidly and has nearly tripled since 1990, from 1,161 people to 3,237 people, according to the US Census Bureau.

Implications

Research indicates that there are more similarities in the leisure patterns of diverse ethnic groups than there are differences. Any differences that do exist may actually reflect differences in other areas, such as household income, rather than differences in ethnic background and need for recreation facilities and programs.

Research also indicates that as Platte County becomes more diverse our parks will become more heavily utilized. This will create a need for more amenities in our parks such as shelter houses and picnic areas to accommodate large group gatherings. More un-programmed open space will also become more important as our parks are more heavily utilized.

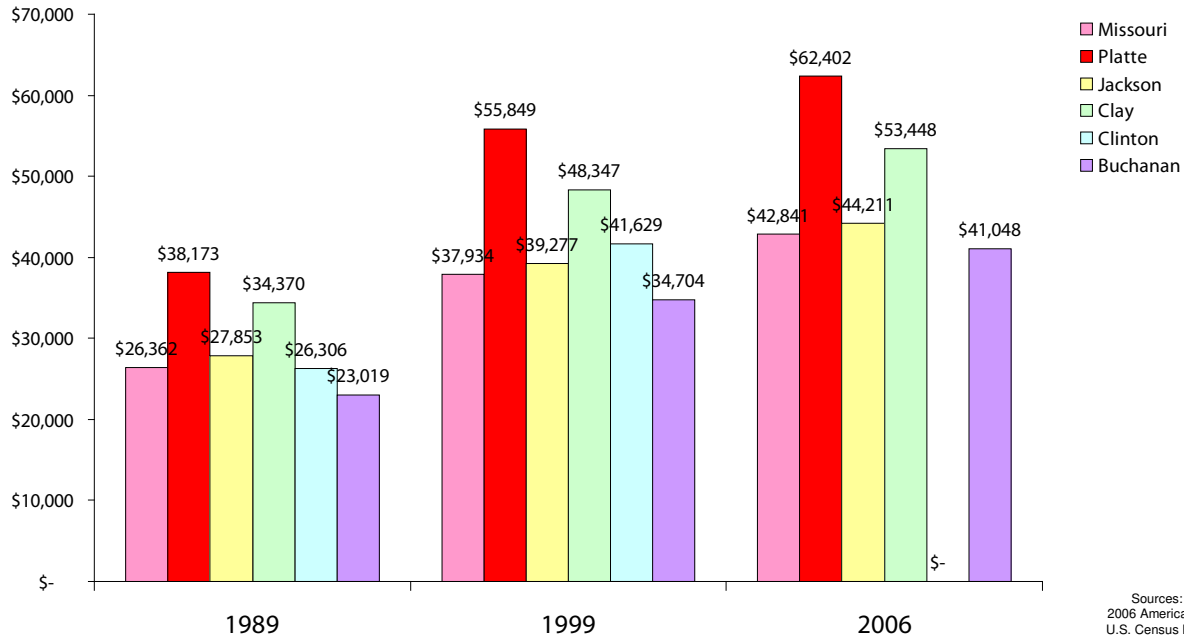
From a programming perspective, a more diverse Platte County population will create good opportunities for new festivals and events that celebrate different cultures and create new educational opportunities.





Market Analysis

MARKET ANALYSIS: POPULATION BY INCOME



Observations

Platte County's median household income has surpassed that of all of the surrounding counties in Missouri as well as the State of Missouri as a whole since the 1990 US Census was taken.

Implications

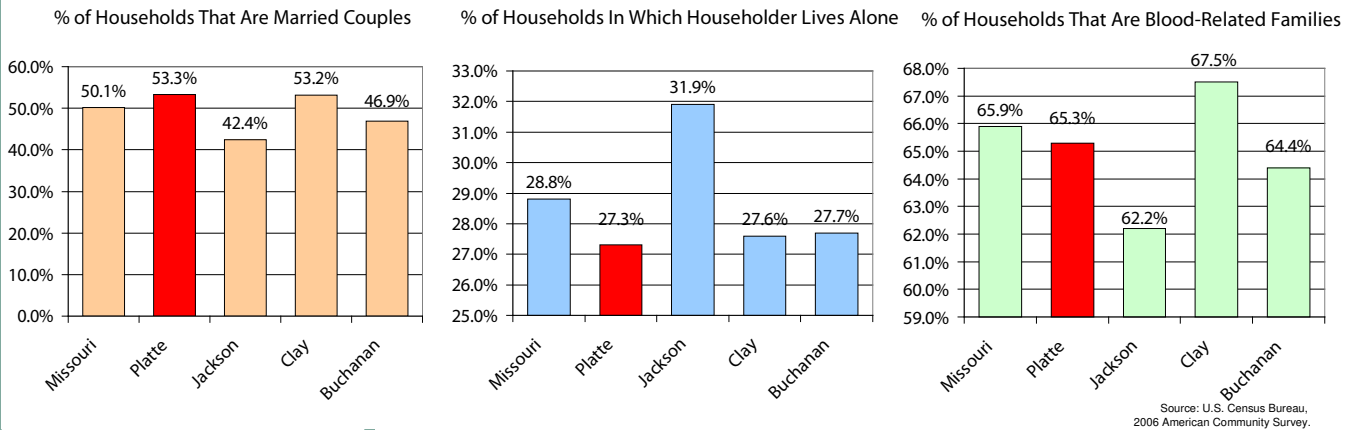
- In Platte County, the citizen survey indicated that there are three primary reasons that lead to less use of program and facilities. Those reasons, in order, are:
 - do not know what is being offered – 36%
 - do not know the locations of parks – 36%
 - not enough time – 32%
- Generally, higher wage earners demand more specialized recreation amenities and are willing to pay for them.



Market Analysis



MARKET ANALYSIS: POPULATION BY HOUSEHOLD TYPE



Observations

53.3% of households in Platte County are married couples. While this percentage is better than the state average and surrounding counties, it still suggests that there is a significant number of single parent households.

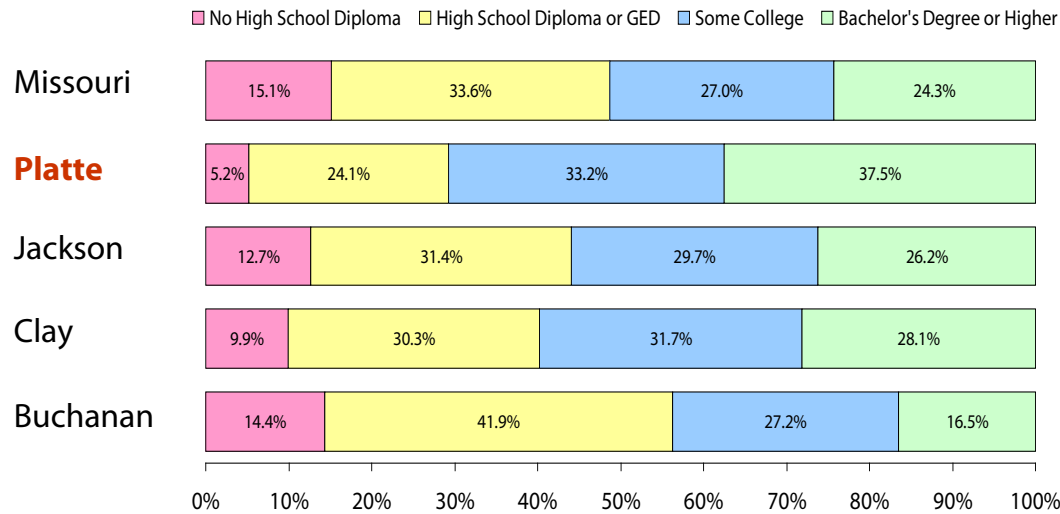
Implications

- Generally, single parent households have lower incomes, less mobility and less free time than do two parent households.
- Generally, single parent households will benefit from recreation opportunities that are close to home.



Market Analysis

MARKET ANALYSIS: POPULATION BY EDUCATIONAL ATTAINMENT



	Population over 25
Missouri	3,849,275
Platte	55,808
Jackson	437,733
Clay	137,431
Buchanan	56,345

Source: U.S. Census Bureau, 2006 American Community Survey.

Observations

Platte County has a significantly higher percentage of college graduates than the State of Missouri and the counties that surround it, while its population without a high school diploma is very small.

Implications

From a planning perspective, there is research which concludes that leisure services are selected, in part, based on one's educational achievements. The Parks and Recreation Department should be aware of the choices that one will make for services, based on their educational level and corresponding higher income earning power and provide choices for services; for example:

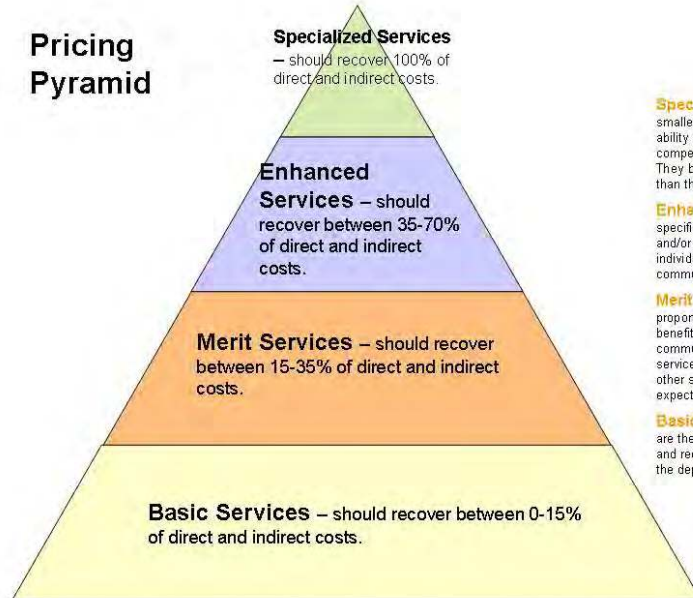
- Offer services that are priced for those who do not earn a lot of money, but also, provide services that are priced for those who can afford to spend more on those services that are important to them.
- As shown on the Pricing Pyramid graphic on the following page, the Parks and Recreation Department will need to adopt a pricing strategy that recovers a greater percentage of costs according to those who benefit from services provided and relative to whether those services benefit the individual or the community-at-large.



Market Analysis



Pricing Pyramid



Specialized Services – target smaller special interest groups or ability levels, most commonly at a competitive or specialized level. They benefit the individual more than the general community.

Enhanced Services – target specific interest groups, abilities and/or ages. They benefit the individual more than the general community.

Merit Services – serve a large proportion of the community and benefit the individual and the community as a whole. These services are not typically offered by other service providers due to the expected level of subsidy.

Basic Services – Basic services are the foundation of public parks and recreation and are central to the department's mission.





Market Analysis

MARKET ANALYSIS: PEER REVIEW (2008 DATA)

Benchmark	Platte County	St. Louis County	Jackson County	Springfield/ Greene County	Johnson County, KS	Clay County
Budget	\$7.0 M	\$26.75 M	\$13.72 M	\$34.0 M	\$22.5 M	\$6.6 M
Unincorporated Population (2000)	20,376	327,000	21,687	232,487	526,319	13,067
Expenditure Per Person (Unincorporated)	\$277	\$82	\$632 includes some municipal expenses	\$148	\$82	\$505
Acres of Active Park Land	424	7,830 (63%)	8,000	1,707	5,283	1,067
Acres of Undeveloped Park Land	740	4,574	14,000	1,300	4,300	3,200
Bicycle Trails	0	110	0	Included in multi use	Included in multi use	0
Multi-Use Trails	15	48 (hard surfaced)	23	63.2	35.7	23
Equestrian Trails	0	67	25	10	18.4	0
Exercise Trails	2	8.3	0	0	0	0
Nature Trails	2	80	10	3	12.5	0
All other trail types	3.5 cross country	0	20 mountain bike	8.8 mountain bike	8.5 mountain bike	12 mountain bike
Average Annual CIP	\$5.65 M	\$7.42 M	\$400,000	\$50.0 M	\$4.0 M	\$300,000
Source (s) of CIP Funding	½ cent sales tax	Sales tax – 57% Property Tax – 25%	Property Tax	County Sales Tax	Property Tax	Use Tax
What Sales Tax Initiatives	½ cent sales tax for CIP	1/10 mil Regional Sales Tax	None	County Sales Tax	None	None
Why provide Recreation Facilities	Fill the unmet demand	Provide unique facilities to unincorporated areas	Revenue Generation	To meet citizen demands	Fill the unmet demand	To meet citizen demands
Policies for City/ County Cooperation	Yes	None	Yes	Yes	Yes	Yes
Environmental Policies	In Process	Yes	Yes – Recycling Program	Yes	In Process	Yes
Integrated into County General Plan	Yes	Yes	No	Yes	Yes	Yes