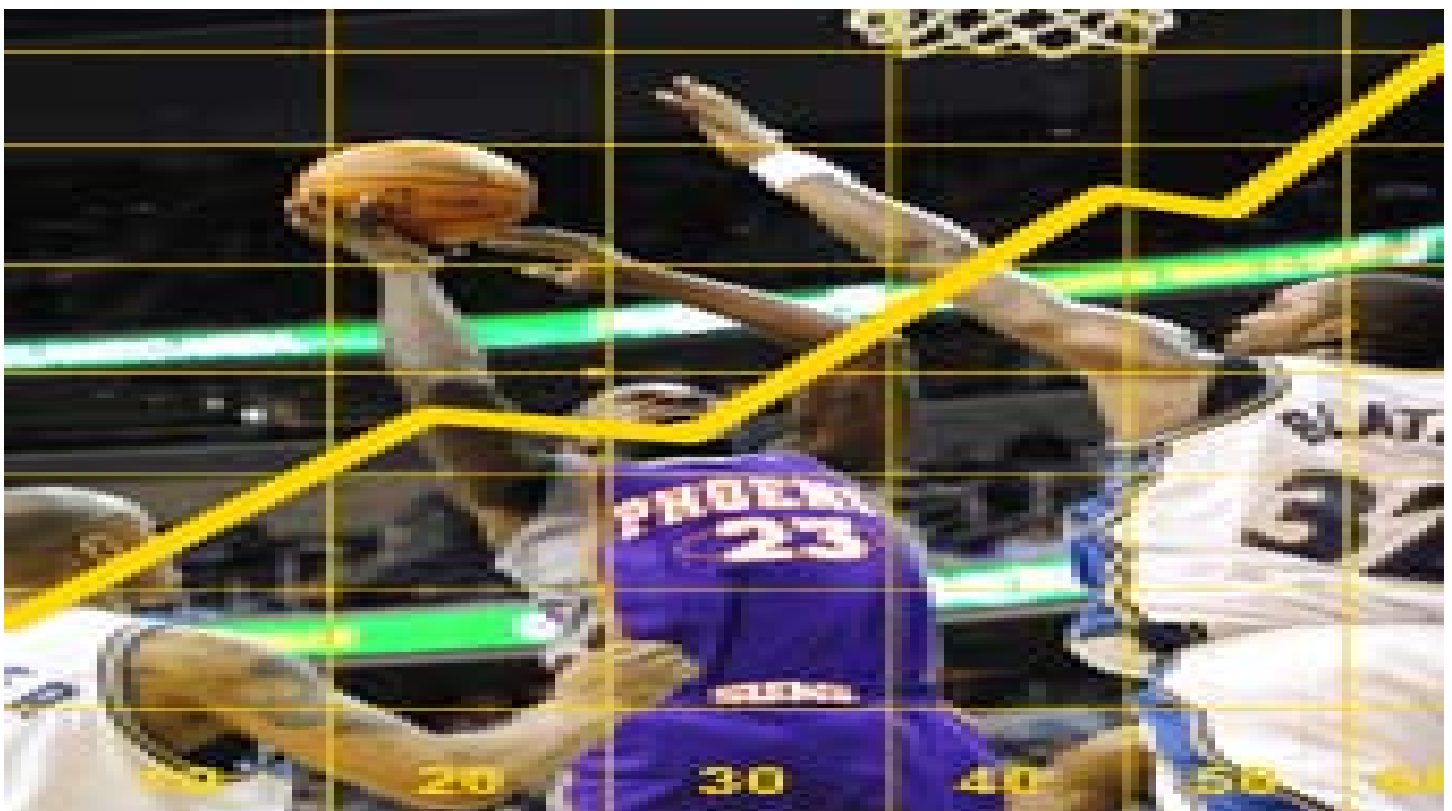


RECREATION MANAGEMENT

IDEAS AND SOLUTIONS FOR RECREATION,
SPORTS AND FITNESS FACILITY MANAGERS

STATE *of the* INDUSTRY



RECREATION MANAGEMENT

THE MAGAZINE WITH IDEAS & SOLUTIONS FOR RECREATION, SPORTS & FITNESS FACILITIES MANAGERS

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2009 REPORT ON THE STATE OF THE MANAGED RECREATION INDUSTRY

General Survey Results

Welcome to Recreation Management's 2009 State of the Industry Report, where we peel back the layers to look at the inner workings of the managed recreation, sports and fitness industry. If you've been privy to past reports, you know what kind of information you're likely to find in these pages. If this is your first time joining us, know that you can look forward to learning about major trends impacting facilities like yours across the country, from budget challenges to investments in facilities, programs and services for the public and much more.

The research contained in these pages is based on an extensive survey, conducted by Signet Research Inc., an independent research company. From February 10 to March 2, we collected 2,064 responses from recreation, sports and fitness professionals from across the country and around the world.

What we call an "Industry Report" might more correctly be termed an "Industries Report." Recreation may be the broad brushstroke that unites the respondents whose information we have collected on these pages, but within that broader picture there is an extremely wide range of colorful approaches, from nonprofit YMCAs to for-profit health clubs, from government-funded parks and recreation centers to privately supported ballparks, from colleges and schools that unite their students in wellness to camps that give those students something to do during their summer breaks.

But despite their many ways of doing business, it is the service of offering recreation, sports and fitness activities to the public that unites these organizations. And that's not all that unites them. Although they may operate differently, there are overarching themes that impact the entire industry: savvy business practices and budget management—whether you're operating for profit or for the public—that ensure your facility stays in the black; the need to ensure properties and facilities are well-maintained, occasionally updated and serving patrons' needs and desires with the right amenities and programs; the challenges of hiring and training staff members; the need to get the word out to let existing and potential patrons know about existing opportunities and creative new programs they'll find beyond your door or gate; the imperative to ensure they are safe once inside; and much, much more.

No matter your mode of operating, you'll be sure to find some nuggets of information on these pages that will help you, whether you're looking to compare how you're sailing in these rough economic waters with others across the country or you want to figure out who's spending how much to build new facilities in your region. We welcome you to dig right in by reading this first section, which considers the industry as a whole, with occasional breakdowns by facility type; or to turn to the sections in the pages that follow that consider regional information, as well as more specific data on aquatic facilities; parks and recreation departments; colleges and universities; schools and school districts; health, sports and fitness clubs; and nonprofit entities

Survey Methodology

Signet Research Inc., an independent research company, sent an e-mail broadcast on Feb. 10, 2009, to nearly 21,000 subscribers to Recreation Management, who were invited to participate in the online survey. When the survey closed on March 2, 2,064 responses had been collected, for a 10 percent response rate. The findings of this survey may be accepted as accurate, at a 95 percent confidence level, within a sampling tolerance of approximately +/- 2.2 percent.

like YMCAs, YWCAs, JCCs and Boys & Girls Clubs.

Look Who's Talking

Before diving into the specifics of budgets, staffs and resources, let's first consider who's talking. This year's respondents represented a wide range of professionals from across the United States and abroad, representing many different types of facilities.

Reflecting the readership of Recreation Management, the majority of respondents were in management-level positions. More than a third (34.3 percent) were directors, while nearly a fifth (19.7 percent) work in administration management positions, such as administrator, manager or superintendent. Another 15.1 percent represented operations facility management, roles like operations manager, facility manager, building manager or supervisor. Program and activity administration roles, such as activity or program directors, managers, coordinators, specialists, coaches and instructors, made up another 11.8 percent of the respondents. High-level titles like chairman, CEO, president, vice president and owner were held by 9 percent. Just 1 percent represented service providers like planners, designers, architects and consultants, and another 9.1 percent indicated they had "other" titles.

Regionally, this year's survey yielded a similar proportion of respondents from specific regions of the country, with the largest group—though smaller than in years past—coming from the Midwest. **(See Figure 1)** Some 28.8 percent of this year's respondents (compared to 30.4 percent last year) were from Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

The second-largest region in our survey was again the West, with 20.3 percent, a small increase from last year's 19.8 percent. This region includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, New Mexico, Nevada, Oregon, Utah, Washington and Wyoming.

This year also saw a slight jump in participation among the Northeastern states, at 18.6 percent of 2009 respondents, compared to last year's 17 percent. This includes Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont.

There was a slight drop in representation among the South Atlantic states, from 19 percent in last year's survey to 17.8 percent this year. This includes Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, Washington, D.C., and West Virginia.

The smallest U.S. region represented in the survey was the South Central region, with just 13.4 percent of respondents. This is slightly up from last year's 12.1 percent who came from Alabama, Arkansas, Kentucky, Louisiana, Mississippi, Oklahoma, Tennessee and Texas.

Finally, there was a drop in participation among international respondents. Last year saw 1.7 percent of respondents from international facilities, while this year, the number is 1 percent.

We break down the information gathered by region in [Regional Trends](#).

Similarly to the regions represented, this year saw very little change in the types of communities our respondents hail from, with a slight drop in the percentage of suburban facilities, and a slight increase in those from urban and rural areas. **(See Figure 2.)** The largest group of respondents represent facilities in suburban areas (40.3 percent, down 3.5 percent from last year), while about a third (33.5 percent) were from rural facilities, a jump of 1.8 percent from last year. Slightly more than a quarter of respondents (26.2 percent) were from urban areas, an increase of 1.7 points over last year.

When it comes to their modes of operation and management, the majority of respondents, nearly two-thirds (65 percent) indicated they work for public organizations such as park districts, public schools and universities. The next largest group, at 18.6 percent of respondents, represent private nonprofit facilities like YMCAs and JCCs. Finally, 14.8 percent were from private for-profit facilities like health clubs, golf clubs and waterparks. **(See Figure 3.)**

Just as in the past two years' surveys, we saw the greatest number of respondents in 2009 from parks and recreation departments and agencies. More than four in 10 (40.3 percent) of respondents said they represent this type of facility. More specific breakdowns for this segment of the industry can be found in [Trends in Parks & Recreation Organizations](#). The next largest group represents colleges and universities, with more than 13 percent of respondents. More specific information from respondents in this category can be found in [Trends in Colleges & Universities](#). They were followed by community or private recreation and sports centers, with 7.5 percent of respondents. Schools and school districts represented 7.2

percent of respondents. More specific information on trends in schools can be found in [Trends in Schools & School Districts](#). Campgrounds, RV parks, and youth or private camps (hereafter referred to as "camp facilities") made up 7.1 percent of respondents. YMCAs, YWCAs, JCCs and Boys & Girls Clubs (hereafter referred to as "YMCAs," with more specific information in [Trends in YMCAs, YWCAs, JCCs and Boys & Girls Clubs](#)), made up 5.1 percent of the responses. Sports, health and fitness clubs (referred to in this report as "health clubs," with more specific information appearing in [Trends in Health, Fitness & Sports Clubs](#)) made up 3.7 percent of respondents. Military installations were represented by 3 percent of respondents. Rounding out this category, all with less than 3 percent of the response, were: golf or country clubs (2.7 percent); resorts and resort hotels (2.3 percent); waterparks, theme parks and amusement parks (2.2 percent); ice rinks (0.8 percent); corporate recreation and sports centers (0.7 percent); racquet clubs or tennis clubs (0.5 percent); and stadiums, arenas and tracks (0.3 percent). **(See Figure 4.)**

This year saw a jump in the number of facilities that include some sort of aquatic element, whether a full-blown waterpark, an indoor aquatic center, an outdoor pool, a splash play area or a whirlpool. In the 2008 report, 51.6 percent of respondents indicated that their facilities included aquatic elements. This year that number jumped by just over 3 percent to 54.9 percent of respondents. These were dominated by outdoor pools, included in nearly two-thirds of this group's facilities, and indoor pools, included in nearly half. More specific information on trends in aquatic facilities can be found in [Trends in Aquatic Facilities](#).

While the greatest percentage of respondents (36.8 percent) indicated that they manage just a single facility, it comes as no surprise, with the preponderance of parks and recreation respondents, that so many manage more than one facility. On average, respondents manage 7.5 facilities, and the majority (80 percent) indicated that they manage nine or fewer, while 19.1 percent indicated that they manage 10 or more facilities. **(See Figure 5.)**

Respondents from parks and recreation organizations and schools were the most likely to report that they managed 10 or more facilities. Around three in 10 respondents from these facilities said they managed 10 or more facilities. On average, respondents from schools manage 10.8 facilities, while those from park districts manage 10.7.

On the other end of the spectrum, camp facilities were the most likely to report that they manage just a single facility. Some 70.5 percent of camps respondents said they manage a single facility. That said, on average, camps respondents manage 3.6 facilities. Similarly, respondents from health clubs and from YMCAs were highly likely to indicate that they managed three or fewer facilities. Some 86.9 percent of health clubs and 83 percent of YMCA respondents said they manage three or fewer, compared to just 39.9 percent of parks, and 33.5 percent of school respondents. That said, YMCAs average a higher number of facilities overall, at 4.6, than college and university respondents, with 4.4. **(See Figure 6.)**

Partnerships can be an extremely useful tool for expanding a facility's reach into the community or for expanding the programming capabilities of an entity, especially in a sagging economy. But some types of organizations are far more likely to form these kinds of partnerships than others.

A sizeable majority (84.7 percent) of respondents indicated that they do form partnerships with other organizations. The most common partners for these respondents are local schools (57.5 percent of respondents said they partner with schools), local government agencies (48.7 percent) and nonprofit organizations (43.9 percent). More than one-third (34 percent) also indicated that they partner with state government agencies. **(See Figure 7.)**

The least common partners are private health clubs. Just 4.5 percent of respondents indicated that they had formed a partnership with a private health club. However, this does represent a slight increase from 2008, when just 3.7 percent indicated they had partnered with a private health club.

Most facilities were more likely to indicate they had formed partnerships this year than last. The biggest jump—6 percent—was seen among schools and school districts. This year saw 86.4 percent of respondents from schools and school districts indicating that they formed partnerships with other organizations. Respondents from YMCAs and parks and recreation organizations were the most likely to indicate forming partnerships. A vast majority of each—97.1 percent of YMCAs and 95.6 percent of parks and recreation respondents—said they had formed partnerships with external organizations. Camps and health clubs were the least likely to partner, though a majority of respondents in each category still reported that they had done so: 65.2 percent of camps and 77.1 percent of health clubs said they had formed partnerships. **(See**

Figure 8.)**The Economy's Impact**

When last year's survey was released, the word "recession" was beginning to be tossed around, but there was as yet no consensus that we were in the midst of one. That has changed this year, and the numbers in this year's survey definitely indicate that the down economy is having an impact on facilities.

A majority (88.1 percent) of respondents across all categories indicated that they are either extremely or somewhat concerned about the impact the recession will have on their facilities. **(See Figure 9.)**

More than 90 percent of respondents from YMCAs (96 percent), camps (91.7 percent) and parks and recreation organizations (90.7 percent) said they were either somewhat or extremely concerned. Colleges and universities, on the other hand, were less likely than other types of respondents to report high levels of concern, though more than three-quarters (78.2 percent) of respondents in this category were either somewhat or extremely concerned about the impact of the downturn on their facilities.

What actions are facilities taking in light of their concerns?

Many indicated that they are looking at or have already made budget cuts and staffing cuts. Some also reported increasing the fees they charge for their programs and memberships or decreasing the level of service provided to patrons. While some indicated they had plans to close facilities down completely, many more said they were shortening seasons or reducing the hours their facilities were open.

Interestingly, many respondents reported taking an opposite approach to offer more to the public: more programs and discounts to attract new and returning patrons. Additionally, many indicated making a push to improve or increase their marketing efforts and their customer service levels.

While some respondents said they were being forced to cut back on capital spending, others said they were aiming to spend money wisely, by investing in improved energy efficiency. Some were taking simple steps to improve efficiency, for example by turning off lights, while others were investing in systems to improve their energy efficiency, such as solar heating for swimming pools and automation for facility heating and cooling systems.

Despite the high levels of concern, some respondents indicated the down economy was having a positive impact. One respondent from a Northeastern parks and recreation department reported, "We actually do better in a slow economy as people choose to stay closer to home. We need to show that the quality we offer is high even if our prices are lower than the private sector."

The heightened concern about the impact of the recession on facilities is reflected in reported changes to revenues over the next couple of years. Nearly half (45.1 percent) of respondents indicated that their 2008 revenues were higher than in 2007, but in 2009, just 38.1 percent are anticipating higher revenue over 2008. The good news is that respondents seem to anticipate a rebound in 2010, as 41 percent expect revenues in 2010 to rise again. **(See Figure 10.)**

The big change in revenue projections between our 2008 survey and this year's survey is found in the number of respondents who are expecting their revenues to decrease. While just 3.9 percent of last year's respondents said they expected revenues to drop from 2007 to 2008, this year 14.1 percent indicated their revenues had in fact dropped in that time period. **Even more are expecting revenues to decrease in 2009 and 2010 as they adjust to changing conditions.** Just over one-fifth (20.5 percent) of respondents said they expect revenues to fall in 2009, and 17.8 percent expect lower revenues in 2010. On the bright side, the vast majority of respondents still expect their revenues to either hold steady or increase in 2009 (79.5 percent) and 2010 (82.2 percent).

Health club respondents were by far the most likely to be anticipating a decline in revenues from 2008 to 2009. More than one-third (35.7 percent) of respondents in this category indicated they were expecting a decrease. YMCAs, on the other hand, were the least likely to expect a drop in revenues, with just 11 percent of respondents from YMCAs indicating they anticipate declines from 2008 to 2009. This surely is reflective of the vastly different operations for these two types of facilities, one group being made up mostly of for-profit entities, and the other being made up entirely of nonprofit facilities.

Looking forward to 2010, while schools and school district respondents continue to feel the pinch, other respondents were most likely to be expecting their revenues to either hold steady or pick back up. YMCAs, camps and health clubs were most likely to be expecting their revenues to increase again in 2010. More than half of respondents in each of these categories—and more than two-third of YMCAs—expect to see an

increase in revenues in 2010 over 2009. More than a third of parks & recreation respondents (38.6 percent) and college respondents (34.6 percent) also expect their revenues to increase in 2010.

As you would expect, operating budgets are also expected to contract slightly over the next couple of years. While fiscal 2008 saw a 33.5 percent increase to operating budgets over the numbers reported for 2007 in last year's industry report, respondents are expecting a drop in 2009 of 13 percent to an average of \$1,612,000. In 2010, operating budgets are expected to regain their footing, with a jump of 4.2 percent to \$1,679,000. **(See Figure 11.)**

There is a silver lining in these trends though, as the figures reported by this year's respondents for 2008 were actually 26.9 percent higher than respondents last year anticipated. Last year, respondents reported they were expecting operating budgets of \$1,459,300 in 2008. Likewise, the operating budgets projected in this year's survey for fiscal 2009 are 3.7 percent higher than last year's respondents projected.

The greatest drop in operating expenditures between 2008 and 2010 is expected by respondents from schools and school districts. These respondents reported an expected drop of 18.5 percent in their operating expenditures. Parks and recreation organizations are anticipating a drop of 13.7 percent in the same time frame, while respondents from camps, YMCAs and colleges/universities are expecting more modest decreases, at 3.4 percent, 2.7 percent and 2 percent, respectively.

The trend is brighter for health clubs, whose respondents are anticipating an increase of 2 percent in their operating expenditures between 2008 and 2010. **(See Figure 12.)**

Despite decreasing revenues and budgets, many respondents indicated that they are aiming to hold their fees steady—and some are even reducing their fees—because of their concern that the economic downturn may prevent patrons from getting involved in their programs or taking advantage of all their facilities have to offer if the fees are deemed to costly.

There was virtually no change this year in the number of respondents who indicated that their facility charges a fee. Just under two-thirds (62.6 percent) of respondents said they charge a fee. **(See Figure 13.)**

As one might expect, YMCAs and health clubs were the most likely to charge a fee for using their facilities, with 97.1 percent of YMCA respondents and 86.5 percent of health club respondents indicating they do so. Schools and school districts, as well as colleges and universities, were the least likely to charge a fee. Less than a quarter (23.4 percent) of schools indicated they charge a fee, while 59.9 percent of college respondents said they do so.

In our original State of the Industry survey in 2007, 48.5 percent of respondents anticipated increasing their fees from 2006 to 2007, but in last year's report, just 26.6 percent reported they actually had increased those fees. This year, the trend reverses. In last year's report, less than one-third (31.9 percent) of respondents indicated they planned to increase their fees from 2007 to 2008, but this year, 37.6 percent indicated they actually had done so. However, while 45.9 percent of last year's respondents projected increasing their fees between 2008 and 2009, this year just 37.6 percent of respondents indicated that they have plans to do so.

The majority of respondents aim to hold their fees steady over the next few years. From 2007 to 2008, 61.3 percent of respondents did not change their fees, and 60.7 percent plan to hold those rates steady this year. Next year, while 41.6 percent of respondents are expecting to increase their fees, 57.2 percent still plan to keep their rates firm. **(See Figure 14.)**

With all of the budgetary concerns, it is interesting to note that respondents this year are much more likely to be expecting some volatility in the number of people using their facilities than in past years. While more than half of the respondents to our 2008 survey were expecting no change in usage in 2007, 2008 and 2009, that number drops this year. More than half (54.9 percent) of this year's respondents said the number of people using their facilities increased from 2007 to 2008, and more than half are also anticipating increases from 2008 to 2009 (51.8 percent) and from 2009 to 2010 (55.4 percent).

As a result of this increasing usage paired with lower operating budgets, many indicated they have heightened concern about their ability to keep up with facility and equipment maintenance.

"We've recently renovated older facilities and upgraded equipment," said one respondent. "Our fees are low and our programs are innovative. We are seeing an increase in usage as more people look for less expensive things to do with their families in their hometowns as opposed to traveling to other areas."

And just as more respondents are expecting to see more patrons this year, there is also a larger number anticipating a drop in the number of people using their facilities. While less than 5 percent of respondents to last year's survey expected to see decreases in the number of people visiting their facilities in 2008 and 2009, this year's survey sees a slightly higher number of respondents expecting usage to fall.

As one respondent said, "Recreation is the last thing people spend money on if they don't have it."

While 3.6 percent of respondents last year expected a decrease from 2007 to 2008, 11.1 percent of this year's respondents actually reported a decrease. And while 1.5 percent last year were anticipating a decrease from 2008 to 2009, this year, 10.4 percent expect a decrease in that time frame. **(See Figure 15.)**

Colleges and universities were the most likely to have seen an increase in usage from 2007 to 2008, and were also the most likely to be anticipating increasing usage from 2008 to 2009. Nearly two-thirds (64.7 percent) of college/university respondents said their facilities saw more usage in 2008 over 2009, and 63 percent expect they'll see more users in 2009 versus 2008. The trend continues in 2010, when 58.4 percent anticipate another increase. The increasing usage among college/university facilities plays out in those respondents' top concern. Nearly two-thirds (65.5 percent) indicated that their top current concern (other than the economy and their budgets) was their ability to maintain equipment and facilities.

Health clubs, on the other hand, reported that marketing and increasing their memberships was their top concern other than the budget. This is reflected in the fact that health clubs were the most likely to report a decrease in the number of patrons using their facilities in 2008 over 2007, with more than a quarter (27 percent) saying they had seen a decrease. Half of health club respondents reported an increase for 2008. Likewise, they were the most likely to be anticipating a decrease in 2009, with 17.1 percent reporting they expect decreasing usage in 2009, and 52.5 percent expecting an increase.

YMCAs experienced and expect the greatest amount of volatility in the number of patrons using their facilities. While 63.1 percent of YMCA respondents reported an increase in 2008 over 2007, 17.5 percent reported a decrease for that same year. And while 52.5 percent expect an increase in 2009 and 63 percent in 2010, 12.9 percent expect a decrease in 2009, and 8.7 percent in 2010.

Moving Onward, Upward

Despite their concerns about the economy, nearly two-thirds of respondents (63.3 percent) said they have plans of one kind or another for new or renovated facilities. "We are still improving our facilities and moving forward," said one respondent, capturing this mood. "If we pause because of the economy, we will be guaranteed to slow. We need to move forward to remain where we are."

While this year saw a drop in the number of respondents who have plans to build new facilities, or make additions or renovations to their existing facilities over the next three years, it is important to note that construction has not stalled to the level one might expect. As mentioned, nearly two-thirds of respondents indicated they have plans in place. Renovations are planned by 43.1 percent, additions by 29.8 percent, and new construction by 28.6 percent. **(See Figure 16.)**

Camp facilities were the most likely to have plans of any kind, with more than three-quarters (77.2 percent) of these respondents reporting that they had building plans in the next three years. They were most likely to be planning renovations (57.5 percent of camp respondents), followed by new facilities, planned by 38.6 percent. In fact, camps were the most likely of all respondents to be planning all-new facilities.

Parks and recreation respondents were the second most likely to indicate that they have construction plans in place over the next three years.

Two-thirds (66.7 percent) of these respondents have plans to build, with 46.7 percent planning renovations, 34.6 percent planning new facilities, and 31.2 percent planning additions.

Two-thirds of YMCAs (66 percent) also have construction plans in place, with 44.7 percent planning renovations, 34 percent planning additions, and 23.3 percent planning new facilities.

The least likely to be planning any construction over the next three years were schools and school districts, though 50 percent do have plans of some kind in place.

The least likely to be planning all new facilities were health clubs. Just over 10 percent of health club respondents are planning new facilities, though nearly a quarter (22.7 percent) are planning additions and 42.7 percent are planning renovations.

Those who do have plans to build over the next three years are expecting to spend, on average, \$4,835,000

on those plans, an increase of 9.9 percent over last year's respondents, who expected to spend \$4,400,200 million.

The highest construction budgets are seen among colleges and universities, which are planning to spend \$9.8 million on average, 34.6 percent more than respondents in this category were planning to spend in last year's survey. They are followed by schools and school districts, with \$7.4 million, and YMCAs, with \$5.2 million. More modest budgets are seen among camps, which plan to spend \$913,000 on their improvements, and health clubs, planning \$1.6 million. **(See Figure 17.)**

Despite the inclination to pull back on funding for construction in a tight economy, Randy Mendioroz, principal and founder of Aquatic Design Group, a California-based designer of aquatic facilities, said that if you have the funding, the competition among construction firms is driving the cost of building new facilities down.

"The recession has been pretty brutal on the construction side of the industry, so it's driving prices way down," Mendioroz said. "We're seeing a minimum of 20 percent under budget. If you're a public sector client with some cash and some funding, it's a great time to bid projects. You want to get them shovel-ready as soon as possible."

In addition to anecdotal evidence about the declining cost of construction, a recent report from the Associated General Contractors of America also indicates that construction is a bargain right now. Decreasing economic activity has driven producer prices down for some kinds of material. "In addition, increased competition for a shrinking number of overall construction projects has reportedly led contractors to cut their margins, further adding to lower-than-expected bid prices on public projects," said Ken Simonson, chief economist for the AGC. "The price declines make this a great time for public agencies and private owners alike to start construction projects, particularly because this 'limited-time sale' may not last much longer."

In fact, information from the American Institute of Architects shows that new construction projects may not be falling nearly as quickly as they were recently. After seeing historic lows, the AIA's Architecture Billings Index was up more than eight points in March. While it still indicates an overall decline in demand for design services, the score can be viewed "with cautious optimism," according to AIA Chief Economist Kermit Baker, Ph.D., Hon. AIA. "The fact that inquiries for new projects increased is encouraging, but it will likely be a few months before we see an improvement in overall billings."

When it comes to the amenities included in their facilities, more than half of this year's respondents indicated that their facilities included such features as: bleachers and seating (included by 57 percent of respondents), locker rooms (56.9 percent), classrooms (55.9 percent), outdoor sports courts for games like basketball and tennis (55.9 percent), concession areas (55.2 percent), playgrounds (55.1 percent), natural turf sports fields for games like soccer and football (53.2 percent), park structures including shelters and restroom buildings (51.7 percent), and open spaces like natural areas and gardens (51.7 percent). **(See Figure 18.)**

The biggest changes from last year's survey were seen in the following areas:

- Natural turf sports fields for games like football, baseball and soccer jumped 11 percent to 53.2 percent from 42.2 percent in last year's survey.
- Waterparks jumped 4.7 percent to 10.1 percent from 5.4 percent last year.
- Outdoor aquatic facilities saw an increase of 3.5 percent to 35.2 percent, compared to 31.7 percent in last year's survey.
- Splash play areas rose 2.9 percent to 14.6 percent, from last year's 14.6 percent.
- Skiing and outdoor winter recreation areas rose 2.6 percent to 7.1 percent from last year's 4.5 percent.
- Synthetic turf sports fields saw an increase of 2.5 percent to 11.3 percent from last year's 8.8 percent.

In addition to their plans for new buildings, additions and renovations, many facilities indicated they had plans to improve by adding features over the next three years. The top 11 most commonly planned additional features include:

1. Splash play areas
2. Park structures such as picnic shelters, shade structures and restroom buildings
3. Playgrounds
4. Bleachers and seating
5. Trails

6. Synthetic turf fields for sports like football and soccer
7. Open spaces like natural areas and gardens
8. Concessions
9. Fitness centers
10. Natural turf sports fields for games like soccer, baseball and football
11. Dog parks

Splash play areas, the most common new amenity planned at facilities across the board, saw their highest popularity in the plans of YMCAs, health clubs and camp facilities. They are also the second most commonly planned addition for park facilities (after park structures). Playgrounds also appear among the top five most commonly planned additions at parks, schools, health clubs and YMCAs.

At colleges and universities, as well as schools and school districts, synthetic turf sports fields, bleachers and seating, and locker rooms are the top three planned amenities. Fitness centers and concession areas also appear in the top five for these facilities.

Climbing walls make an appearance on the top five list for YMCAs and camps, while disc golf courses appear in the top five planned amenities for colleges and camps. Turn to the following sections to learn more about the various plans at different types of facilities.

Staffing & Training

As organizations struggle to meet their budgets, the area of staffing facilities is seeing huge challenges. Human resources are well known to be the most costly expense for just about any type of organization, so cutbacks here are naturally among the first taking place at facilities across the country. In many cases, respondents are concerned that these cutbacks come at the expense of services, programs or facility upkeep.

Last year, respondents reported an average of 181.8 workers of all types, including volunteers and seasonal workers as well as full-time and part-time employees, at their facilities. This year, that number has dropped to 143.9. **(See Figure 19.)**

The biggest drops are to be found among schools and school districts, as well as parks and recreation respondents. Last year's schools respondents reported they employed an average of 226.3 employees, while this year's respondents employ an average of 129.8 employees. And last year's parks respondents said they employed 226.2 employees, compared to this year's 159.1.

YMCAs employ the largest number of workers, largely driven by volunteers, at 333.9, with 195.4 volunteers, on average. They are followed by parks, with 159.1, also predominantly made up of volunteers. The smallest average number of employees was to be found among health clubs, which averaged 52.1, dominated by part-time workers.

Schools and school districts employ the highest number of full-time employees, averaging 88.8, while health clubs employ the smallest number of full-timers at just 10. YMCAs employ the largest number of part-timers, at 128.6, while camps had the lowest number of part-time workers at 12.8. Seasonal workers were most predominant among parks and recreation facilities, which employed an average of 71.4 seasonal employees. Understandably, they were least prevalent at health clubs, which employed just 16.6 seasonal workers on average. Volunteers were primarily found in YMCAs, at an average of 195.4, and parks with 106.9, and were least common at health clubs with 13.8.

Slightly fewer respondents this year indicated that they currently require certification of some kind for their staff members. While last year, 90.1 percent of respondents said they required certification, this year, just 87 percent require certifications. Of those who do not currently require certification, nearly a quarter (24 percent) indicated that they plan to include such requirements in the future. **(See Figure 20.)**

YMCAs lead the way in terms of certification requirements. A full 100 percent of YMCA respondents indicate that their facilities require certification of some kind. They were followed by schools, colleges and parks. More than 88 percent of these respondents indicated they require certification. While so many already require certifications, some still plan to add them. In the future, more than 90 percent of respondents from all types of facilities, excepting camps, plan to require certification. The biggest jumps will be seen among schools, with a jump of 3.4 points, and parks, with a jump of 3.3 points. **(See Figure 21.)**

By far the most common type of certification required is CPR/AED/First Aid certifications, required by 84.3

percent of respondents. More than half also conduct background checks (77 percent) or require lifeguard certification (57.6%). More than a third (34.4%) require aquatic management/pool operations certification; and around a quarter require personal training/fitness certification (26.9%), and pesticide application certification (24.5%). **(See Figure 22.)**

Programming Facilities

While some recreation facility respondents do not offer any type of programming at all, the vast majority (94.1 percent) indicated that they do currently offer programs of one kind or another. Programming—and innovative and creative approaches to programming in particular—is seen by many respondents as one of the keys to their facilities' success.

In the number-one spot for most common programs again this year were holiday events and other special events, which can be found at 62.2 percent of respondents' facilities. Second in the lineup, though third last year, are fitness programs, offered by 54.2 percent of respondents. The third most commonly offered program this year, jumping ahead from the number-four position in last year's survey, is educational programs, offered by 53.5 percent of respondents. Fourth, and falling from the number-two position last year, are day camps and summer camps. Finally, **jumping from seventh place last year to fifth place this year are youth sports teams.** **(See Figure 23.)**

While not among the top five most common programs, there were some other notable increases in programs offered. **Adult sports teams moved from the No. 10 position last year to No. 6 this year**, and are now offered by 46.3 percent of respondents. Arts & crafts programs moved up into the top 10 for the first time, occupying the No. 10 position, with 43.1 percent of respondents offering this type of programming. Perhaps most notable, individual sports activities like running and swimming, jumped from the 27th spot in last year's survey to 15th this year, with more than a third of respondents indicating they offer this type of program.

Nearly half of the respondents to this year's survey indicated that they plan to add additional programs over the next three years. Among these respondents, the most commonly planned program additions, along with their positions in last year's top 10 planned programs, include:

1. Education (4)
2. Fitness (6)
3. Mind-body/balance (9)
3. Day camps and summer camps (2)
5. Holidays and special events (5)
6. Teen programs
7. Active older adults (1)
7. Adult sports teams
9. Sport training
10. Environmental education (7)
10. Sports tournaments and races (8)

This represents a change from last year, when teen programming, adult sports teams and sport training did not appear in the top 10, but nutrition/diet counseling and individual sports activities did.

Top Concerns

While the economy and facility budgets are obviously the main driving concern among our respondents, we also asked them to reflect on the other top concerns for their facilities. Interestingly, many of the top concerns our respondents named relate closely to the impact shrinking budgets or increasing usage have on their facilities. The top five concerns, other than the economy and budget, are the same five that followed the economy and budgets in last year's survey, though in a different order.

Reflecting most of the top concerns, one reader said, "It is difficult to pick just one. Many of our facilities and park equipment are old and with dwindling funding, it will be difficult to keep everything operating at the same level. Also we need to increase programming revenues by offering new and innovative programs."

The top concern now and over the coming years for our respondents is equipment and facility maintenance. More than half (54.6%) listed this as a top current concern, and 43.1 percent said it would be a top concern over the next three years. **(See Figure 24.)**

Increasing usage and decreasing budgets obviously have a huge impact here. "Our facility's use increased with the downturn in the economy," said one reader. "Maintenance of facilities is our No. 1 concern."

Another added that facility and equipment maintenance was a top concern "due to the parks budget being cut and having no control over facility maintenance. They are cutting staff and money for general replacement and repairs for parks."

Staffing issues were the second most common concern, listed by 45 percent of respondents as one of their top current concerns, other than the economy.

"Staffing issues impact other areas of operation," said one respondent. "Upkeep of recreational equipment and grounds depends on staffing. Government quickly solves deficits by cutting staff, which reduces effectiveness to maintain facilities in proper manner."

Another added, "Retaining quality staff as workload increases with new additions to properties and facilities; providing adequate training and compensation as funds get tighter."

The third most common concern among respondents was marketing and increasing participation. 43.9 percent listed this as a top concern now.

"We are being asked to increase our revenue, and we need additional participation to reach that goal," one respondent reported.

Another respondent took a positive view toward increasing participation: "As people tighten their belts due to the economy, this is an opportunity for us to provide alternative entertainment to them at a reasonable price. I feel it is important for us to carve out a larger niche with families. As local government budgets are cut, it also becomes important for my rec center to prove its worth by showing a gain in participation and revenue."

Many reflected this view, explaining that they see increasing their membership or usage in a down economy as the key to their long-term viability, whether they're health clubs operating for profit, or parks looking to justify their investments in new facilities.

"We believe in taking an aggressive approach to programming and promotion. We feel that staying and establishing ourselves in the community will position us for greater success when the economy turns around," one respondent explained.

Fourth on the list was safety and risk management, listed by more than a third (35.6 percent) as a top concern now.

"Safety and risk management will continue to be a strong concern until we get our facilities updated with enhanced safety and security measures," said one respondent.

Budgets once again are felt as an impact here, with one respondent stating, "I personally consider safety and risk management the most important because the administration is trying to tighten the budget in that area."

The fifth most common concern was creating new and innovative programming, closely related to marketing and increasing participation.

"We look at new programming as our number one source of increased revenue," one respondent explained. "We know members are tired of dues and fees increases, so we would rather offer new programs to reach our revenue goals."

Above all, the recession and its impact on facilities' budgets and staffs and their ability to reach out to patrons with safe, up-to-date facilities featuring cutting-edge programs, are driving factors across the industry. As the economy begins to recover—some analysts predict later this year or in early 2010—it will be fascinating to see how recreation, sports and fitness facilities adapt and adjust to changing conditions.