
St. Louis County Parks and Recreation Master Plan Survey Executive Summary

Overview & Methodology

ETC Institute administered a comprehensive parks and recreation needs assessment survey for St. Louis County Parks and Recreation during the winter of 2017. The survey was administered as part of the County's efforts to establish and priorities for improvements to parks and recreation facilities and services in the County. The survey and its results will guide St. Louis County Parks and Recreation in taking a resident-driven approach to making decisions that will enrich the future of the community and positively affect the lives of all residents in St. Louis County.

ETC Institute mailed a survey packet to a random sample of households in St. Louis County. Each survey packet contained a cover letter, a copy of the survey, and a postage-paid return envelope. Residents who received the survey were given the option of returning the survey by mail or completing it on-line at www.STLCountyGov.org.

Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of one of the five counties that St. Louis County Parks and Recreation serve from participating, everyone who completed the survey on-line was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the sample, the on-line survey was not counted.

The goal was to obtain completed surveys from at least 700 residents. The goal was exceeded with a total of 836 residents completing the survey. The overall results for the sample of 836 households have a precision of at least +/-3.4% at the 95% level of confidence.

This report contains the following:

- Charts showing the overall results of the survey (Section 1)
- Priority Investment Rating (PIR) that identifies priorities for facilities and programs (Section 2)
- Benchmarking analysis comparing St. Louis County's results to national results (Section 3)
- Tabular data showing the overall results for all questions on the survey (Section 4)
- A copy of the survey instrument (Section 5)

The major findings of the survey are summarized below and on the following pages.

Parks and Recreational Facility Use

Respondents were given a list of 62 different parks and recreational facilities operated by St. Louis County Parks and Recreation and asked to indicate the parks and trails their households have visited during the past year. The four most visited parks and trails were: Creve Coeur Park, Lone Elk Park, Faust Park, and Queeny Park. Respondents were then asked to indicate which parks their household used most often, based on the sum of respondents' top four choices the most used parks include: Creve Coeur Park, Lone Elk Park, Queeny Park, and Faust Park.

A majority of respondents (67%) indicated their household had visited parks and recreation facilities operated by St. Louis County Parks and Recreation a few times per year (33%) or a few times per month (34%). Thirteen percent (13%) of respondents indicated their household visited parks and recreation facilities at least once per week, 8% visited a facility a few times per week, 3% visited almost daily, 6% visited seldom or never, and 2% only visited a facility once per year.

Satisfaction with Existing Parks and Recreation Programs, Facilities, and Services

The highest levels of satisfaction with existing parks and recreation programs, facilities, and services, based upon the combined percentage of "very satisfied" and "satisfied" responses among residents who had an opinion, were: Creve Coeur Park (89%), Faust Park (88%), Suson Park (87%), Lone Elk Park (86%), Jefferson Barracks Park (86%), Tiles Park (86%), Laumeier Park (85%), and trails (80%).

Respondents showed very high levels of overall satisfaction with the parks and recreation programs and facilities provided by St. Louis County Parks and Recreation. Seventy-seven percent (77%) of respondents were either "very satisfied" (38%) or "satisfied" (39%), 11% were "neutral", only 1% were either "dissatisfied" or "very dissatisfied" with the programs and facilities provided by St. Louis County Parks and Recreation.

Barriers to Park, Facility and Program Usage and Alternative Organizations Used for Recreation Needs

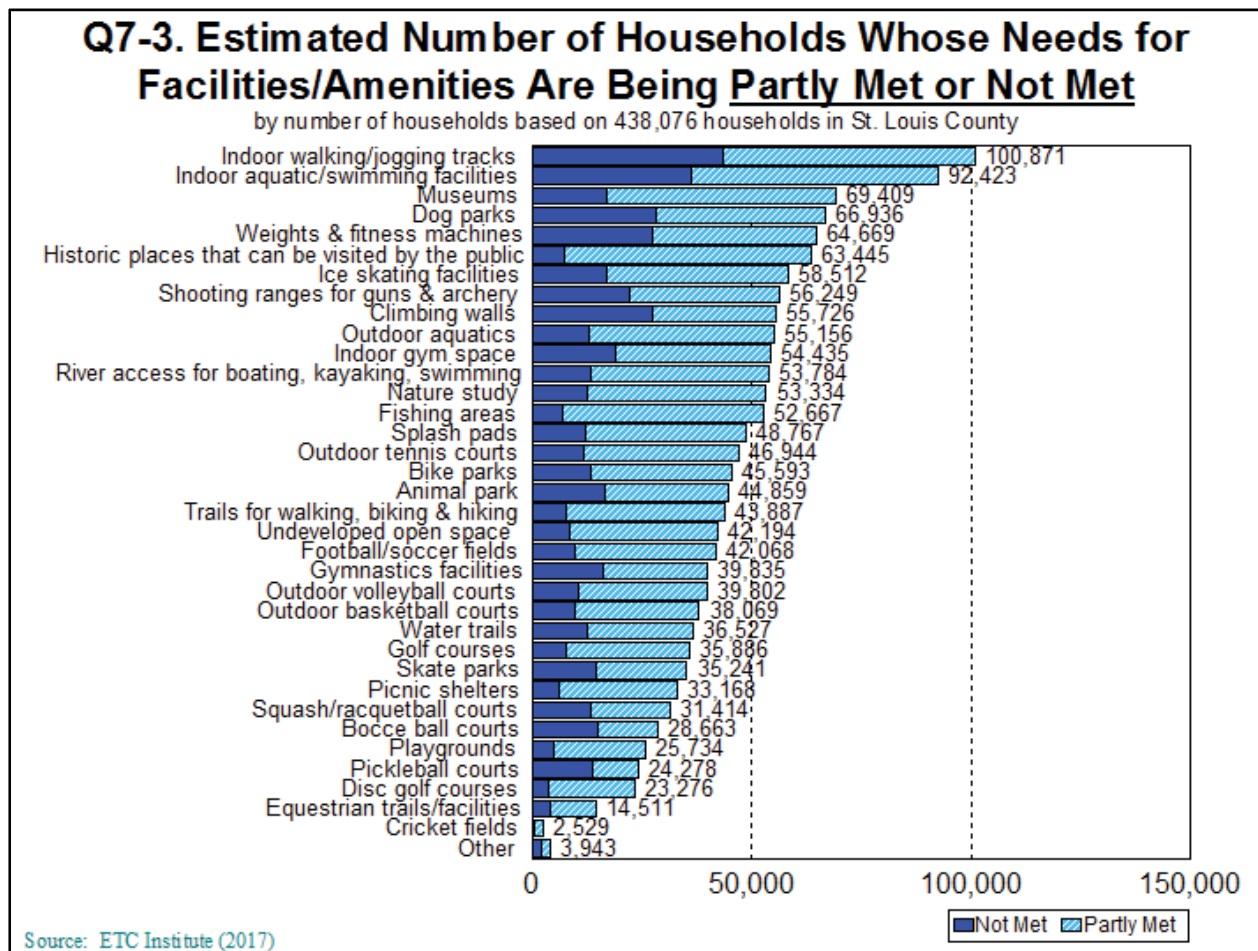
Respondents were asked from a list of 13 potential reasons to identify what prevents them from using recreation programs offered by St. Louis County Parks and Recreation more often. The top four reasons selected were: not knowing what is being offered (34%), nothing or no barrier (32%), lack of interest or too busy (16%), and program times or facility hours are not convenient (13%).

Seventy-two percent (72%) of respondents indicated St. Louis County Parks and Recreation provides the facilities that are used by members of their household. Only 42% of respondents indicated they used local city or municipality facilities, 33% use fitness centers, 27% use local schools, and 23% of respondents use churches or other religious organizations for recreation facilities. Of all the organization listed, the most relied upon organization for recreation facilities is St. Louis County Parks.

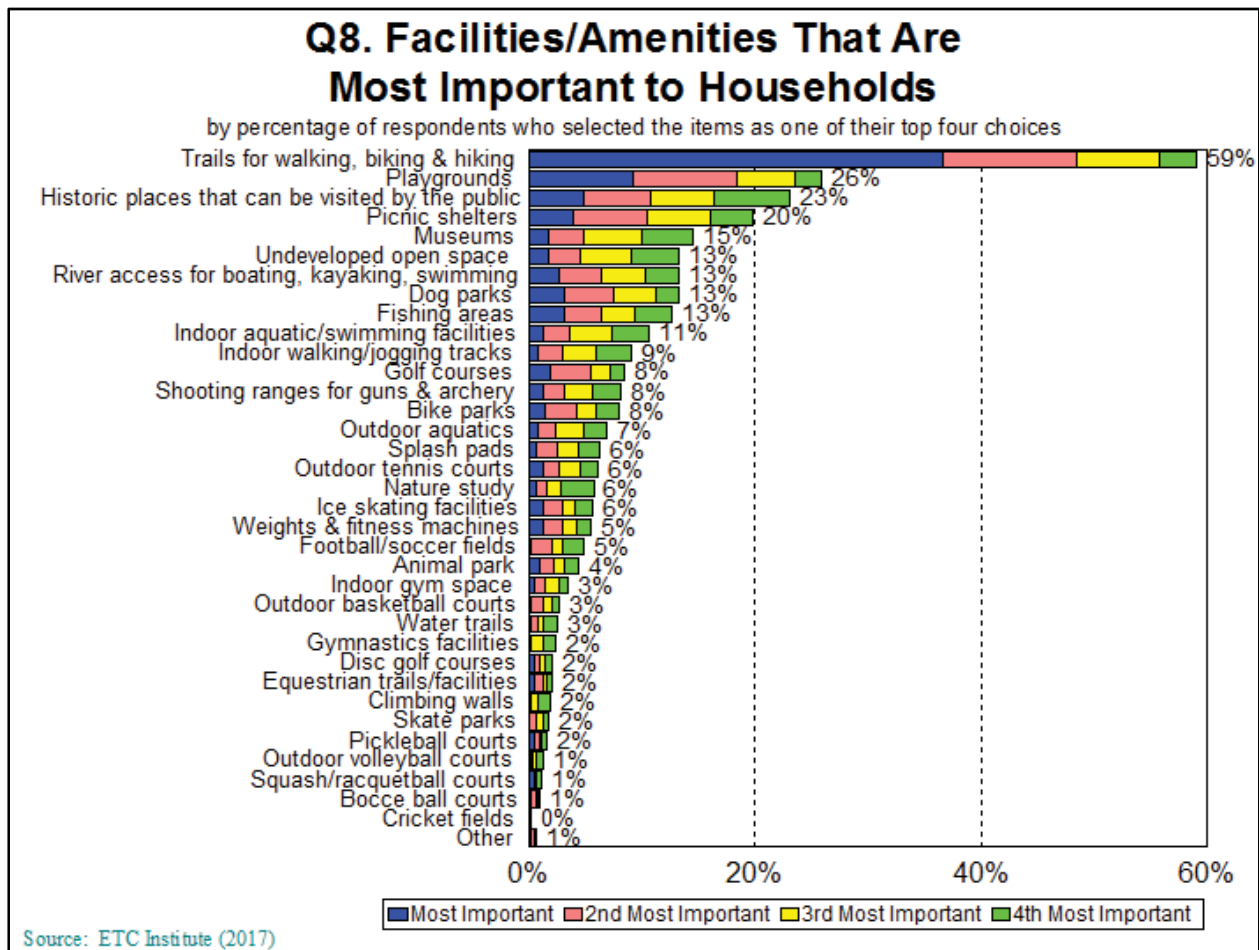
Facility Needs and Priorities

Facility Needs: Respondents were asked to identify if their household had a need for 35 recreation facilities and rate how well their needs for each were currently being met. Based on this analysis, ETC Institute was able to estimate the number of households in the community that had the greatest “unmet” need for various facilities.

The three recreation facilities with the highest percentage of households that indicated a need for the facility were: trails for walking, biking, and hiking (85%), picnic shelters (68%), and historic places that can be visited by the public (64%). When ETC Institute analyzed the needs in the community only one facility had an unmet need that affected more than 100,000 households. ETC Institute estimates a total of 100,871 of the 438,076 households in St. Louis County have unmet needs for indoor walking and jogging tracks. The estimated number of households that have unmet needs for each of the 35 facilities that were assessed is shown in the chart below.



Facility Importance and Use: In addition to assessing the needs for each facility, ETC Institute also assessed the importance that residents placed on each facility. Based on the sum of respondents' top four choices, the three most important facilities to residents were: trails for walking, biking, and hiking (59%), playgrounds (26%), and historic places that can be visited by the public (23%). Based on the sum of respondents' top four choices, the three most used facilities include: trails-paved, multi-use (31%), beaches (25%), and trails-unpaved, hiking (24%). The percentage of residents who selected each facility as one of their top four choices is shown in the chart below.

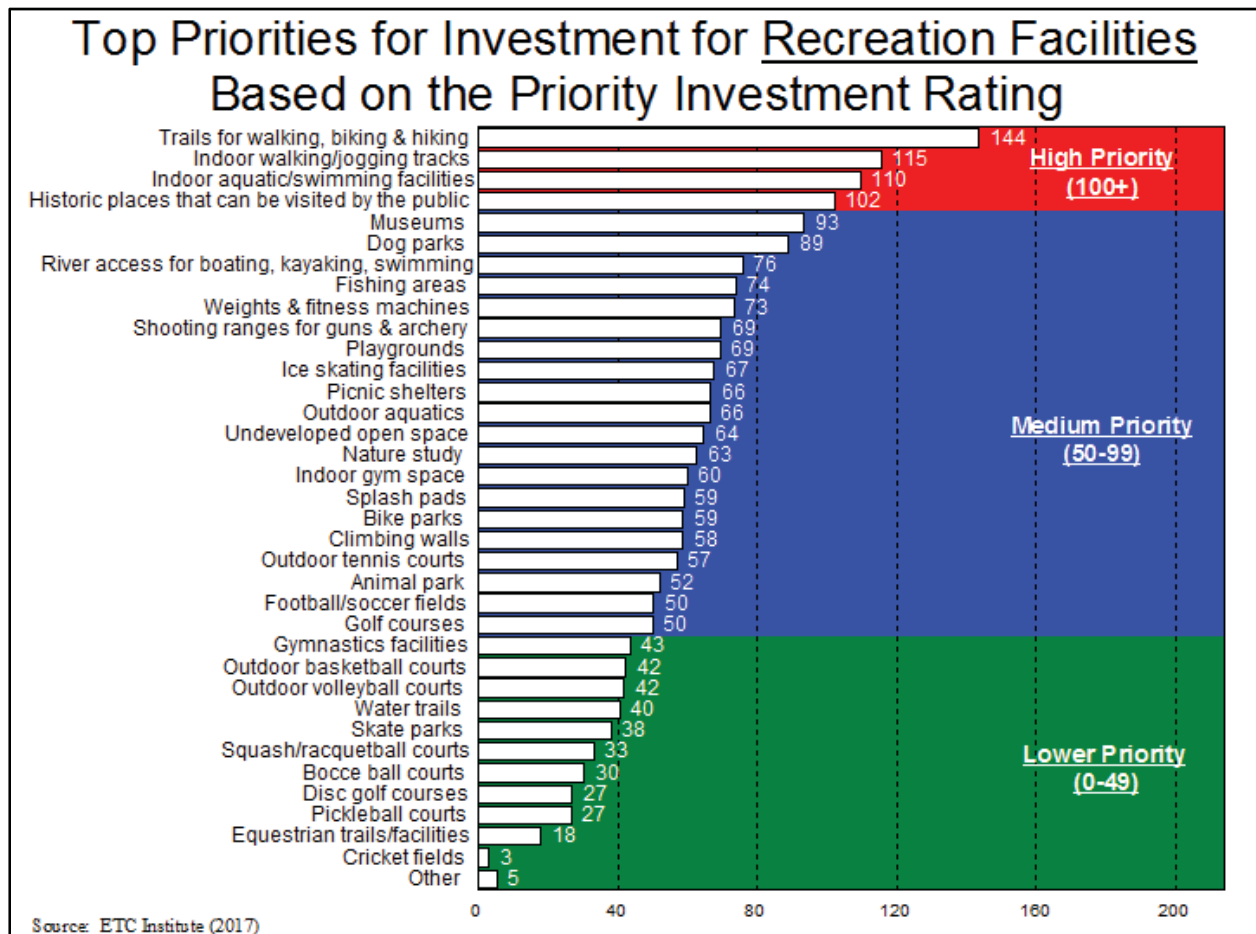


Priorities for Facility Investments: The **Priority Investment Rating (PIR)** was developed by ETC Institute to provide organizations with an objective tool for evaluating the priority that should be placed on parks and recreation investments. The Priority Investment Rating (PIR) equally weights (1) the importance that residents place on facilities and (2) how many residents have unmet needs for the facility. [Details regarding the methodology for this analysis are provided in Section 2 of this report.]

Based the Priority Investment Rating (PIR), the following four facilities were rated as high priorities for investment:

- Trails for walking, biking, and hiking (PIR=144)
- Indoor walking and jogging tracks (PIR=115)
- Indoor aquatic and swimming facilities (PIR=110)
- Historic places that can be visited by the public (PIR=102)

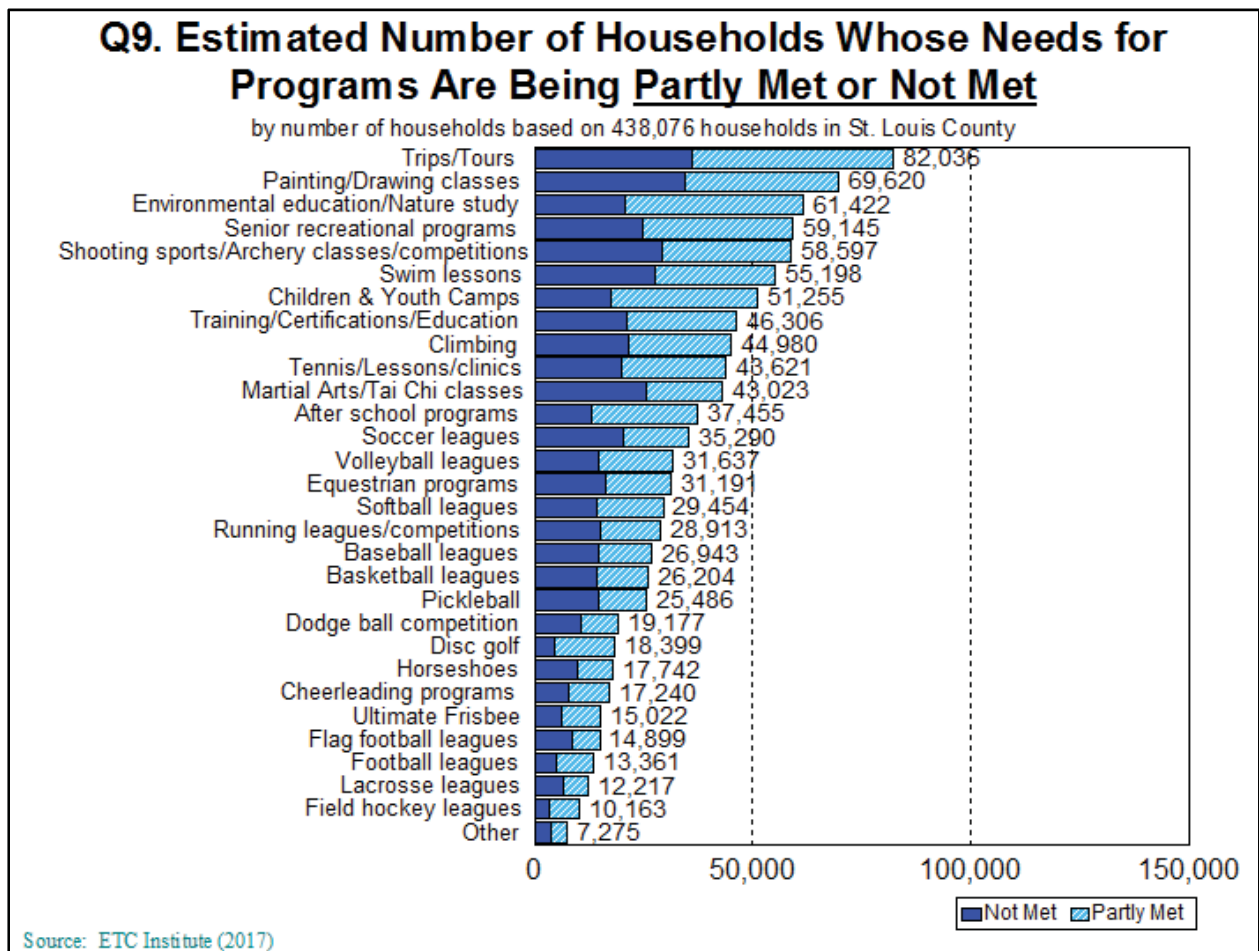
The chart below shows the Priority Investment Rating for each of the 35 facilities/amenities that were assessed on the survey.



Programming Needs and Priorities

Programming Needs. Respondents were also asked to identify if their household had a need for 29 recreational programs and rate how well their needs for each program were currently being met. Based on this analysis, ETC Institute was able to estimate the number of households in the community that had “unmet” needs for each program.

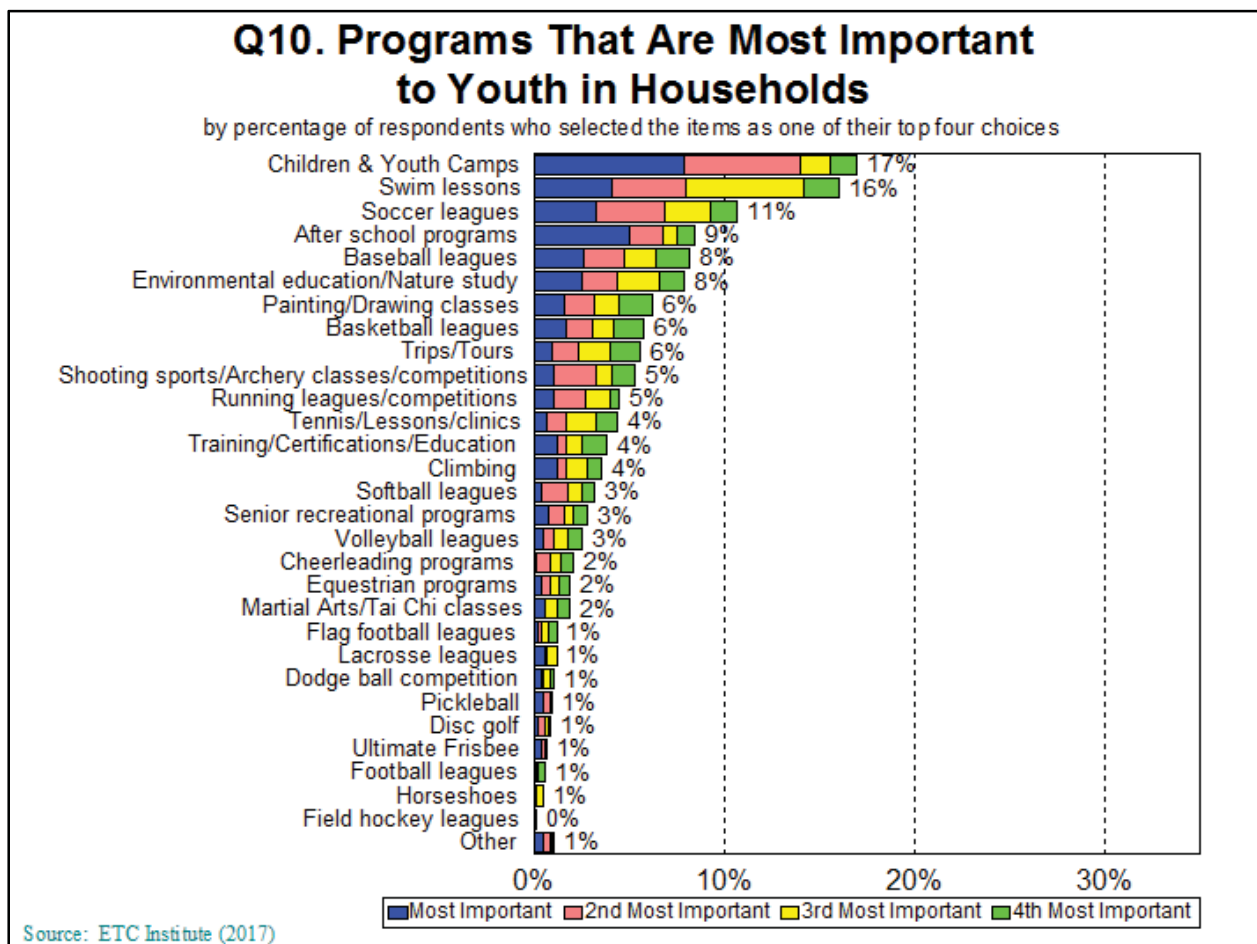
The three programs with the highest percentage of households that had needs were: environmental education and nature study (28%), trips and tours (27%), and swim lessons (25%). In addition to having the second highest total need trips and tours has the highest unmet need among the 29 programming-related areas that were assessed. ETC Institute estimates a total of 82,036 households have unmet needs for trips and tours in St. Louis County. The estimated number of households that have unmet needs for each of the 29 programs that were assessed is shown in the chart below.



Program Importance for Youth. In addition to assessing the needs for each program, ETC Institute assessed the importance of each program for youth in the County. Based on the sum of respondents’ top four choices, the four most important programs to youth were:

- Children and youth camps (17%)
- Swim lessons (16%)
- Soccer leagues (11%)
- After school programs (9%)

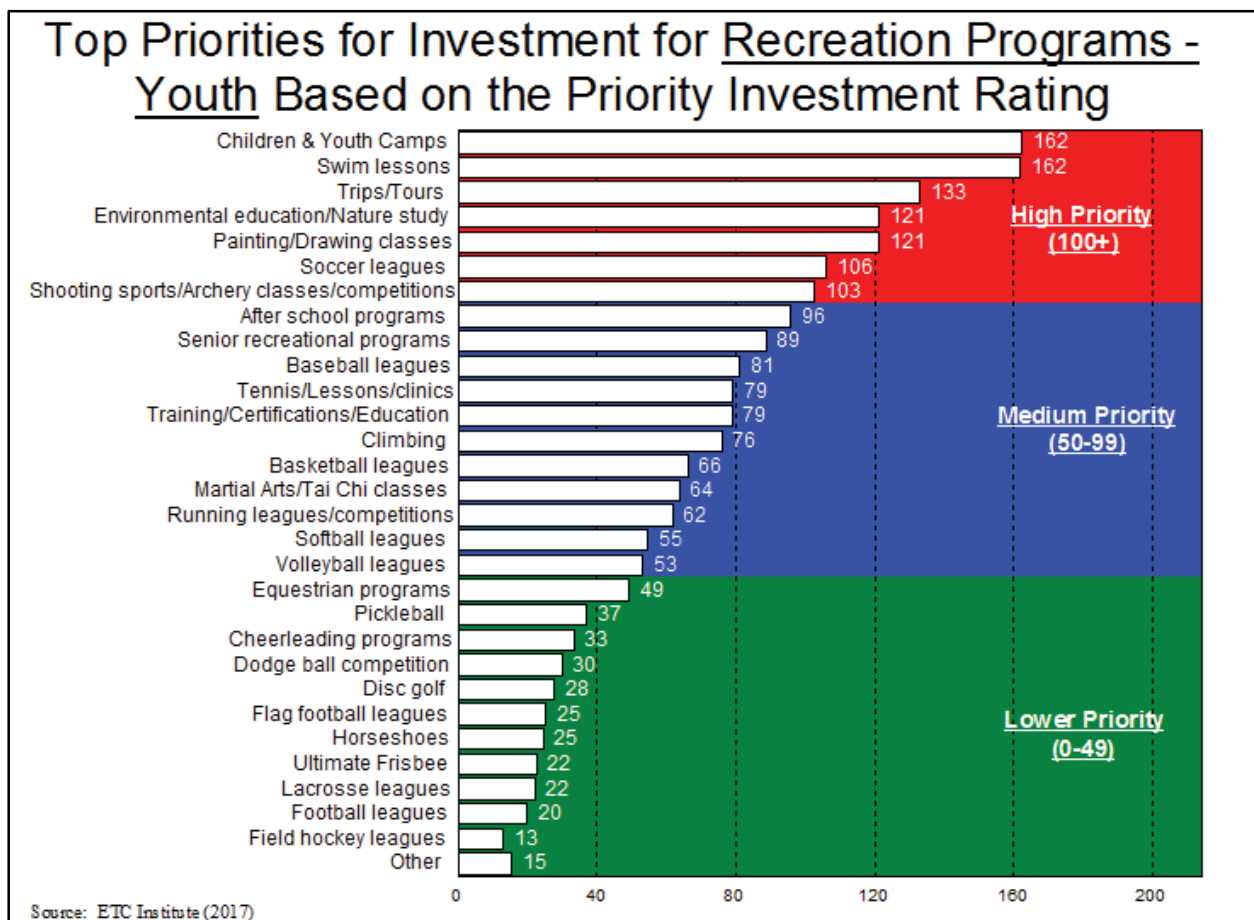
Forty-five percent (45%) of respondents indicated that children (29%) and teens (16%) should be the top priority for St. Louis County Parks and Recreation to serve. The following chart shows the percentage of residents who selected each program as one of their top four most important choices for youth



Programming Investment Priorities for Youth. Based the priority investment rating (PIR), which was described briefly on page v of this Executive Summary and is described in more detail in Section 2 of this report. The following seven programs were rated as “high priorities” for investment related to youth programs:

- Children and youth camps (PIR=162)
- Swim lessons (PIR=162)
- Trips and tours (PIR=133)
- Environmental education and nature study (PIR=121)
- Painting and drawing classes (PIR=121)
- Soccer leagues (PIR=106)
- Shooting sports and archery classes or competitions (PIR=103)

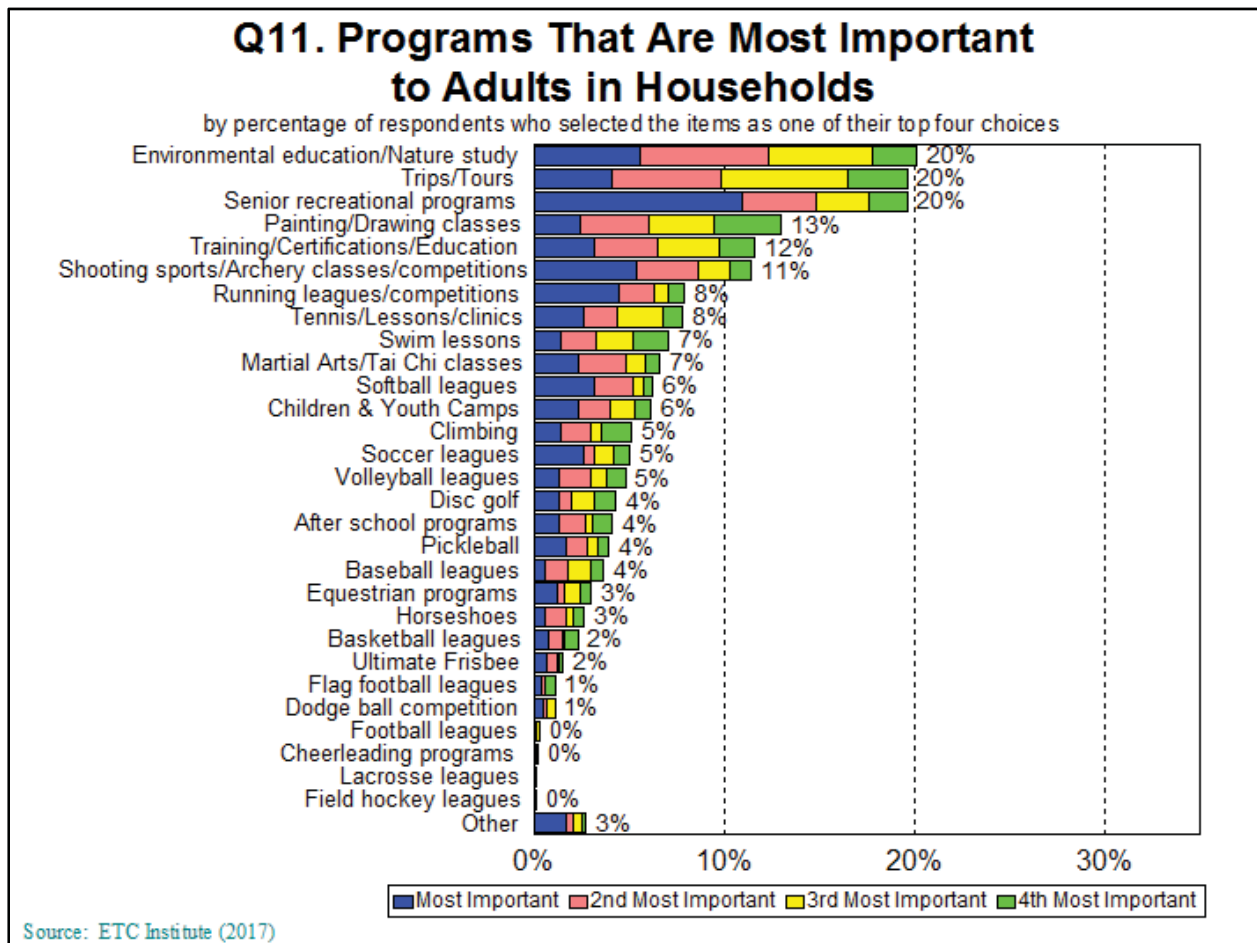
Thirty-two percent (32%) of respondents indicated that adults (23%) and senior adults (9%) should be the top priority for St. Louis County Parks and Recreation to serve. The chart below shows the Priority Investment Rating (PIR) for each of the 29 programs that were rated for youth.



Program Importance for Adults. ETC institute also assessed the importance of each program for adults in the county. Based on the sum of respondents’ top four choices, the four most important programs for adults were:

- environmental education and nature study (20%)
- trips and tours (20%)
- senior recreational programs (20%)
- Painting and drawing classes (13%)

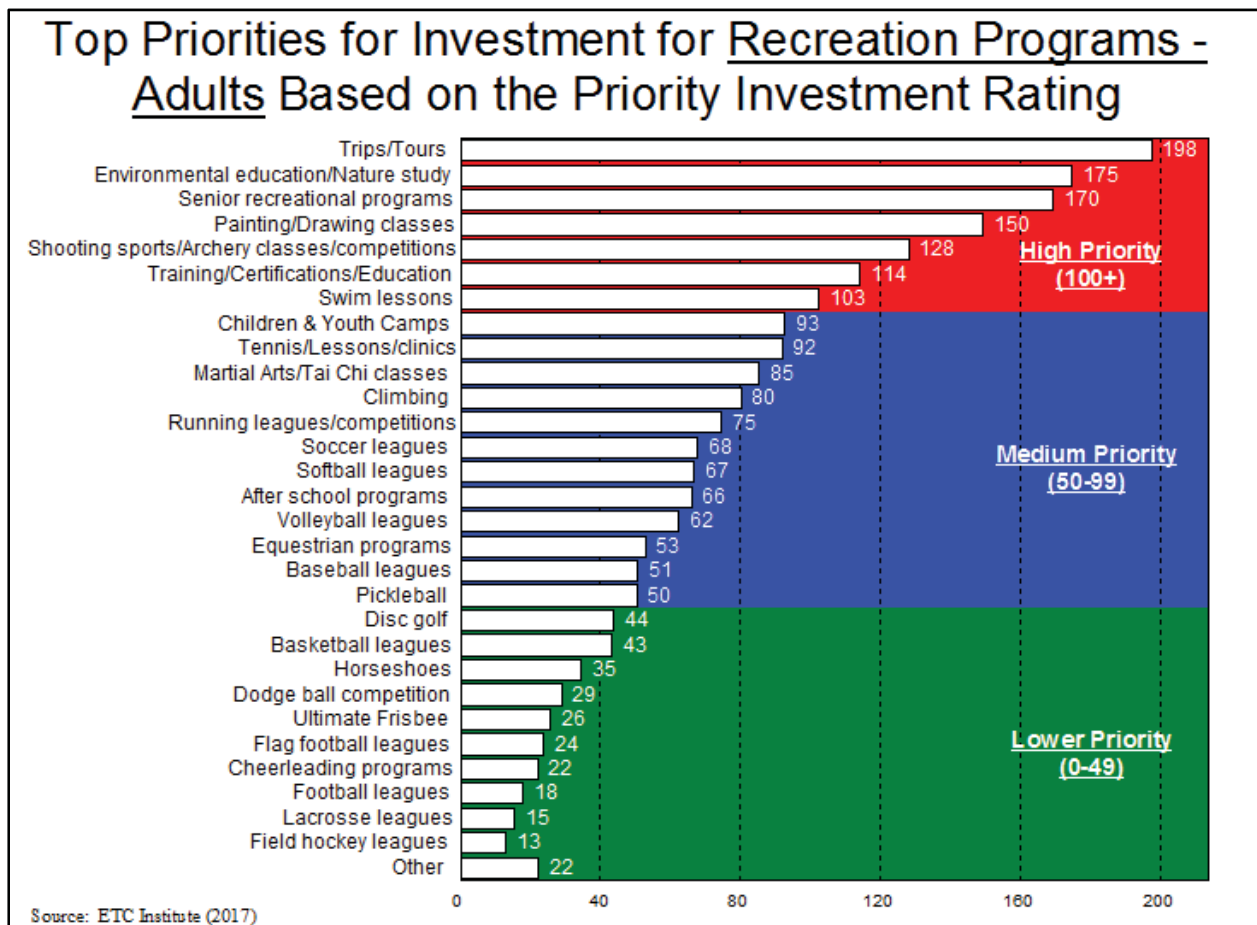
The following chart shows the percentage of residents who selected each program as one of their top four most important choices for adults.



Programming Investment Priorities for Adults. The following seven programs were rated as “high priorities” for investment related to youth programs:

- Trips and tours (PIR=198)
- Environmental education and nature study (PIR=175)
- Senior recreational programs (PIR=170)
- Painting and drawing classes (PIR=150)
- Shooting sports and archery classes or competitions (PIR=128)
- Training, certifications, and education (PIR=114)
- Swim lessons (PIR=103)

The chart below shows the Investment Rating (PIR) for each of the 29 programs that were rated for adults.



Conclusions and Recommendations

Eighty percent (80%) of respondents indicated it is “very important” for St. Louis County Parks and Recreation to provide high quality parks and recreation programs and facilities. Respondents in the County truly value St. Louis County Parks and Recreation and expect high quality parks and recreation programs and facilities. When analyzing the five programs with the highest percentage of households that have a need three of the five had the highest level of unmet need in the County. Trips and tours, environmental education and nature study, and senior recreation programs were among the top four programs when it comes to unmet need within the County. Focusing on these three programs would provide the greatest benefit for the largest number of residents within the St. Louis County. St. Louis County Parks and Recreation could also ensure they are reaching the greatest number of households in the region by focusing resources on developing indoor fitness and aquatic facilities. It is estimated that over 250,000 household have a need for museums within St. Louis County, this ranks fourth among all 35 facilities that were rated. ETC Institute also estimates that of the 250,000 households that have a need for museums nearly 70,000 of those households have unmet needs. By focusing resources on museums within the County, St. Louis County Parks and Recreation would begin to reduce the unmet need for almost 70,000 households while satisfying the need for over 250,000 households in the County.

Respondents were given a list of 24 potential improvements that could be made to St. Louis County Parks and Recreation Facilities. Respondents were then asked to indicate which improvements they would most like to have made to St. Louis County Parks, and if they do not currently use any St. Louis County Parks which improvements would encourage them to use the parks. Restrooms (59%), walking and biking trails (55%), and drinking fountains (37%) were the three improvements respondents indicate they would most like to have made.

In order to ensure that St. Louis County Parks and Recreation continues to meet the needs and expectations of the community, ETC Institute recommends that they sustain and/or improve the performance in areas that were identified as “high priorities” by the Priority Investment Rating (PIR). The facilities and programs with the highest PIR ratings are listed below.

Facility Priorities

- Trails for walking, biking, and hiking (PIR=144)
- Indoor walking and jogging tracks (PIR=115)
- Indoor aquatic and swimming facilities (PIR=110)
- Historic places that can be visited by the public (PIR=102)

Programming Priorities for Youth

- Children and youth camps (PIR=162)
- Swim lessons (PIR=162)
- Trips and tours (PIR=133)
- Environmental education and nature study (PIR=121)
- Painting and drawing classes (PIR=121)
- Soccer leagues (PIR=106)
- Shooting sports and archery classes or competitions (PIR=103)