



Cleveland Metroparks®

FIND YOUR PATH



2021 Park District Visitation & In-Park Intercept Study Results

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Executive Summary

- Over the past decade Cleveland Metroparks has experienced significant growth.
 - **Expanded access** with over 2,300 new acres of land, 50+ miles of new trailway, new park amenities and thousands of free educational programs.
 - **Heightened relevancy** during the COVID-19 pandemic drove the highest number of annual recreation visits on record in the park system's 105-year history.
 - In 2020 and 2021, there were 19+ million recreation visits which is an average of nearly 1 million more visits since 2019.
 - **Enhanced awareness** of offerings has established Cleveland Metroparks as a preferred provider in the community.

Executive Summary Continued

- Multiple research studies have been conducted to better understand guests, usage trends and satisfaction.
 - **2021 Visitation Report** – an annual estimate of attendance at Cleveland Metroparks reservations, golf courses and Cleveland Metroparks Zoo.
 - **2021 In-Park Intercept Study** – an intercept interview study of our park reservations (not including the Zoo) designed to reassess changing demographic and recreation use shifts in the region.
 - This study began in 1991 and has been conducted every ten years since then, providing Cleveland Metroparks with over 40 years' worth of data.
- Overall, it appears the growth in visitation has increased new park users as well as more diverse audiences.

2021 Visitation Overview

Three types of visitation are measured for Cleveland Metroparks.

(1) Visitor Occasions - The number of people *entering* Cleveland Metroparks reservations by vehicle, foot, or bicycle for any reason. This includes all of those who travel through the parks as well as those who visit the parks for recreational purposes.

(2) Recreation Visits - Only includes those who *park their vehicles, or arrive by foot/bicycle/in-line skate, etc.* to use the parks.

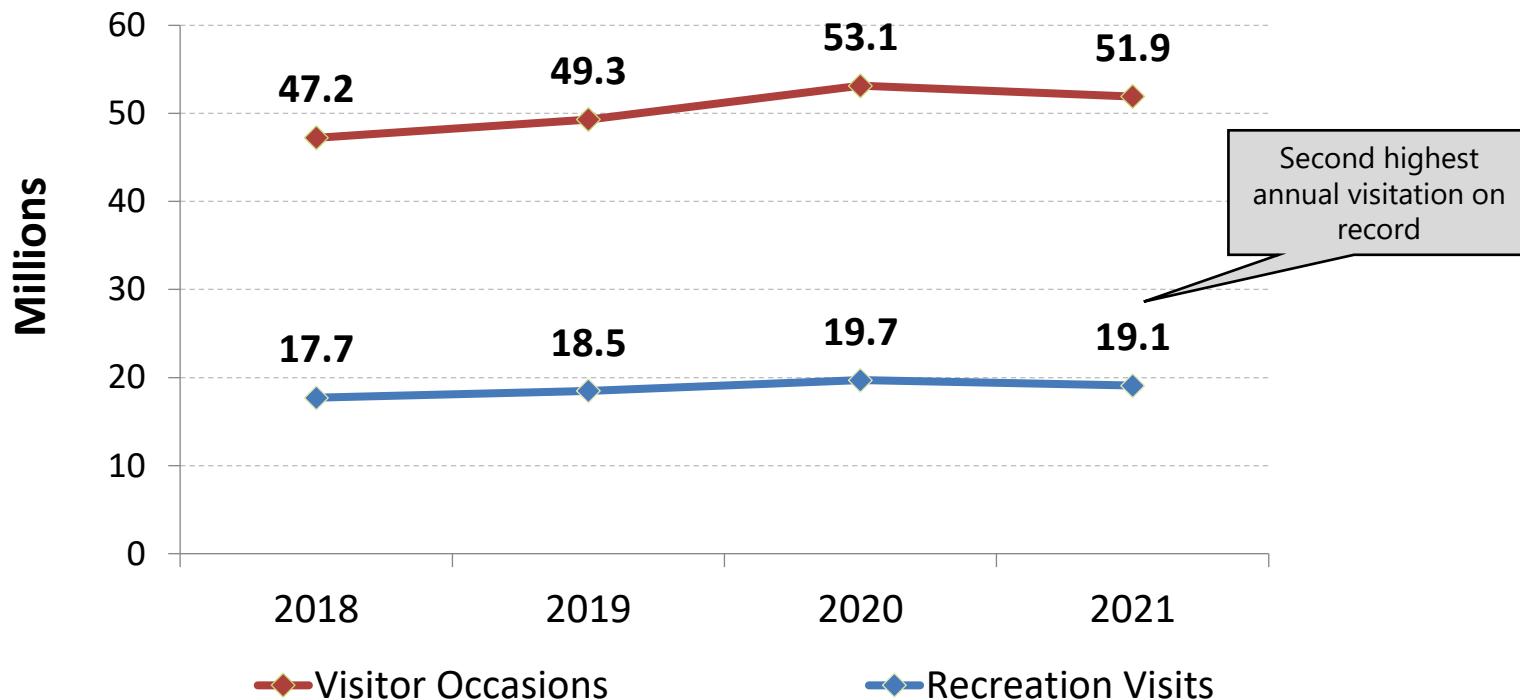
(3) Commuter/Scenic Driving Visits represents the number of vehicles and visitors unaccounted for by Recreation Visits. It is estimated by taking the difference between Visitor Occasions and Recreation Visits.

Visitation Statistics by Category for 2021

Visitor Occasions (1)	51,924,619
Recreation Visits (2)	19,093,312
Commuter/Scenic Driving (3)	32,831,307

Summary of Visitor Occasions and Recreation Visits

- **Visitor Occasions** decreased by 1.2M and **Recreation Visits** by 620,836



- In order to increase the overall accuracy of the annual visitation estimate, a selection of reservations have been reviewed in-depth each year (including persons per car multipliers and parking lot weights).

Areas Experiencing Increases from 2019 to 2021

Brecksville +6%



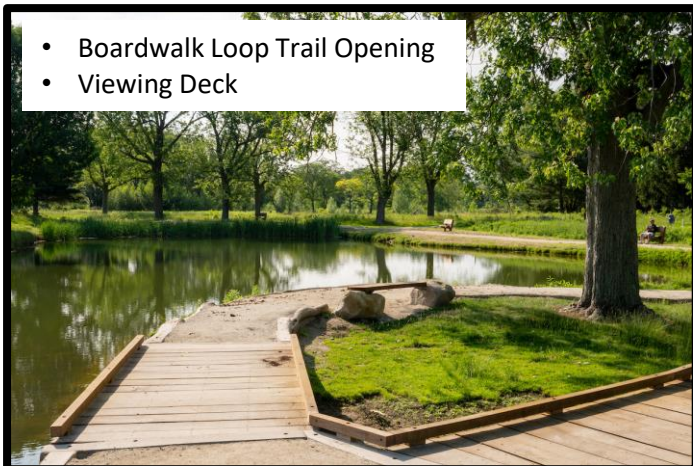
Brookside +6%



Wendy Park/Whiskey Island +11%



Acacia +37%



- Acacia saw a 12% increase from 2020 to 2021

Zoo +5%

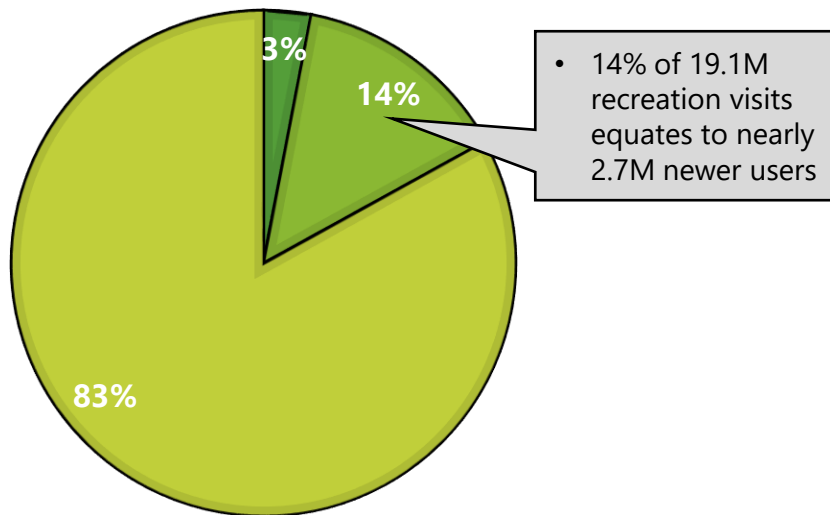


In-park Intercept Survey Results

Intercept Survey Data – 2020 Visitation

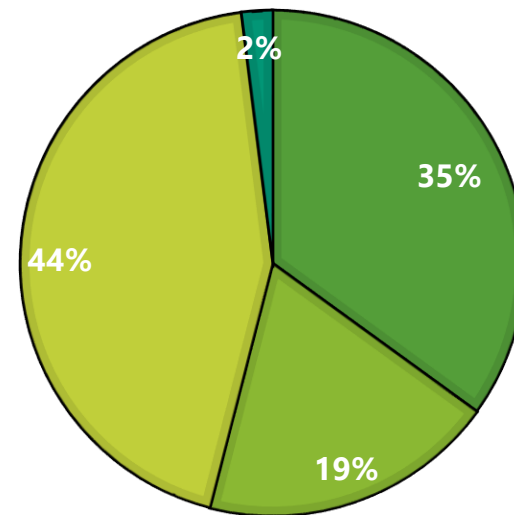
- While the majority of respondents from the intercept survey were returning users in 2020, 14% were new users.
- 35% of respondents stated their visitation has increased since the pandemic, implying new users were retained year over year.
- The demographic make-up of the new and returning users are younger and more diverse.

Did you visit any Cleveland Metroparks reservation(s) prior to 2020?



■ Don't know/Unsure ■ No ■ Yes

Has your visitation of Cleveland Metroparks reservations increased, decreased or stayed the same since the pandemic?



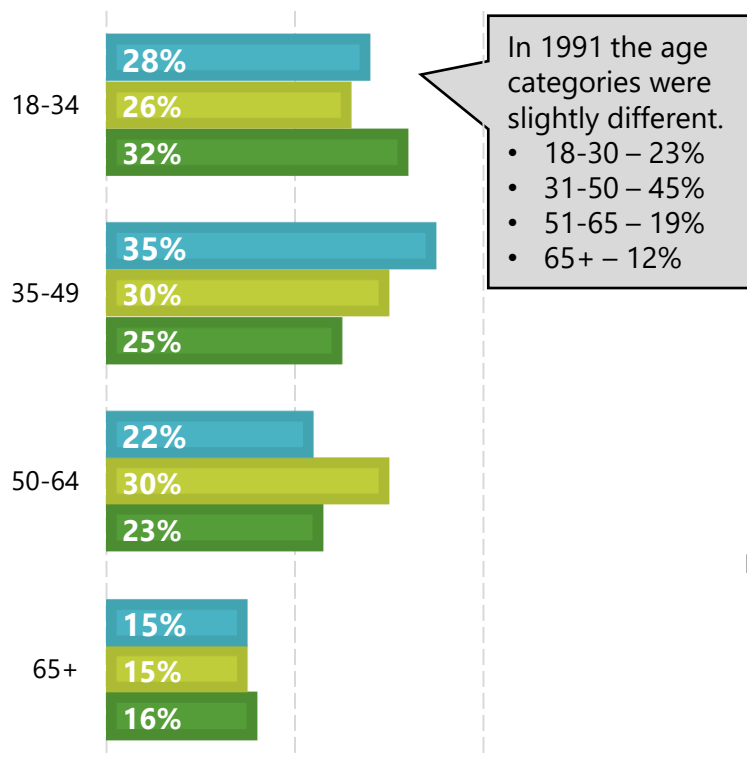
■ Increased ■ Decreased ■ Stayed the same ■ Unsure

Intercept Survey Demographics

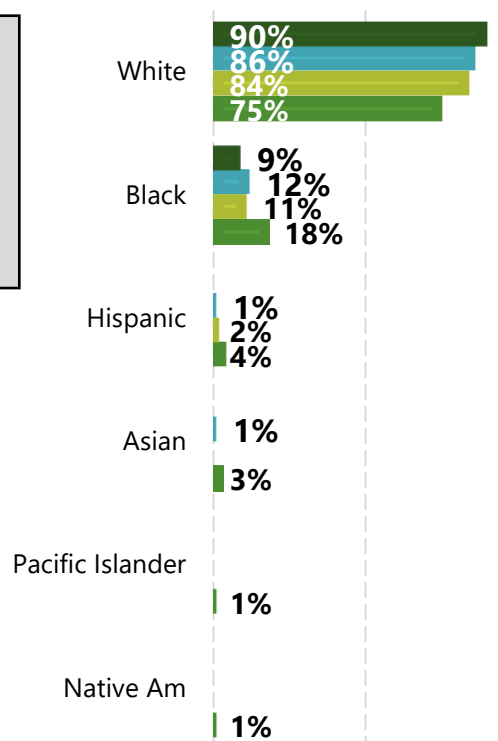
■ 1991 ■ 2001 ■ 2011 ■ 2021

- The respondent pool was younger, more racially diverse and more female dominant than in years past.

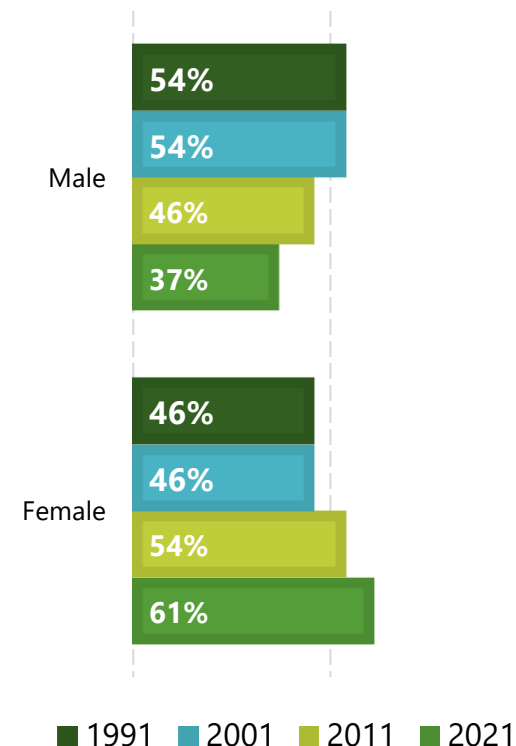
Age



Race/Ethnicity



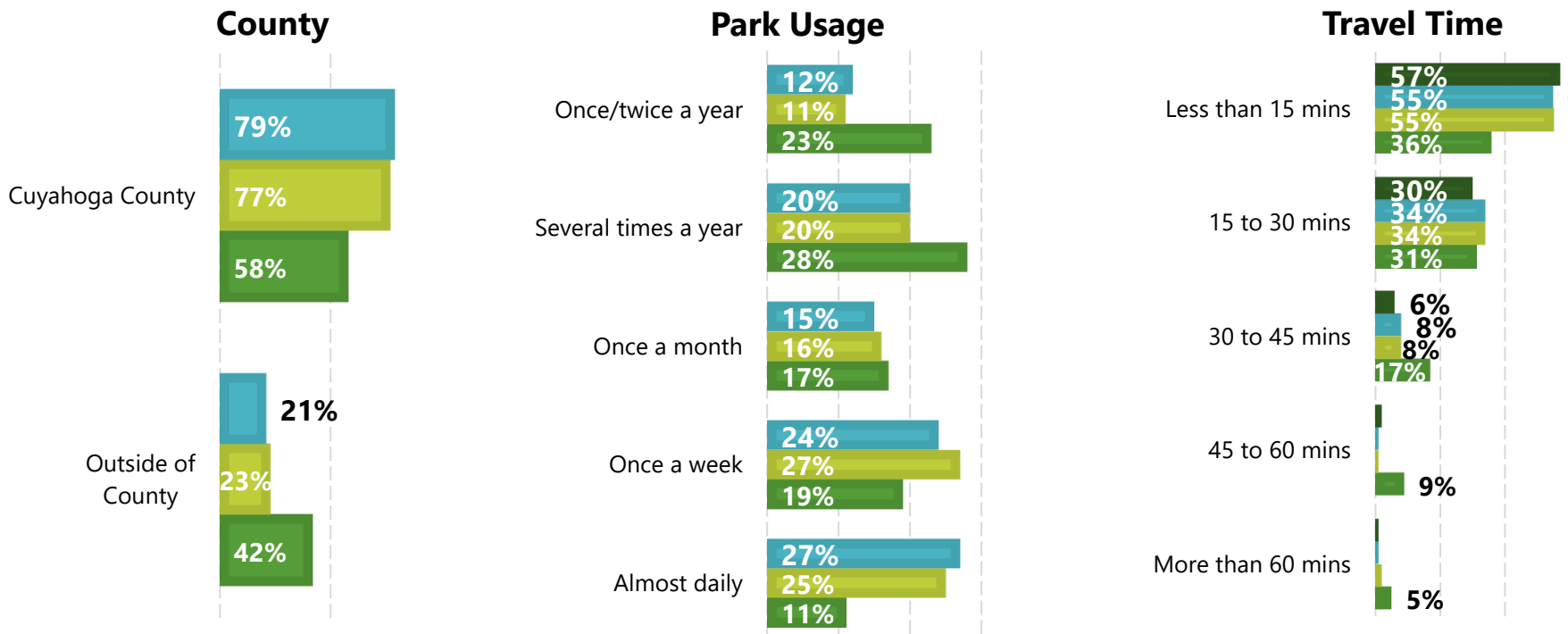
Gender



Intercept Survey Background

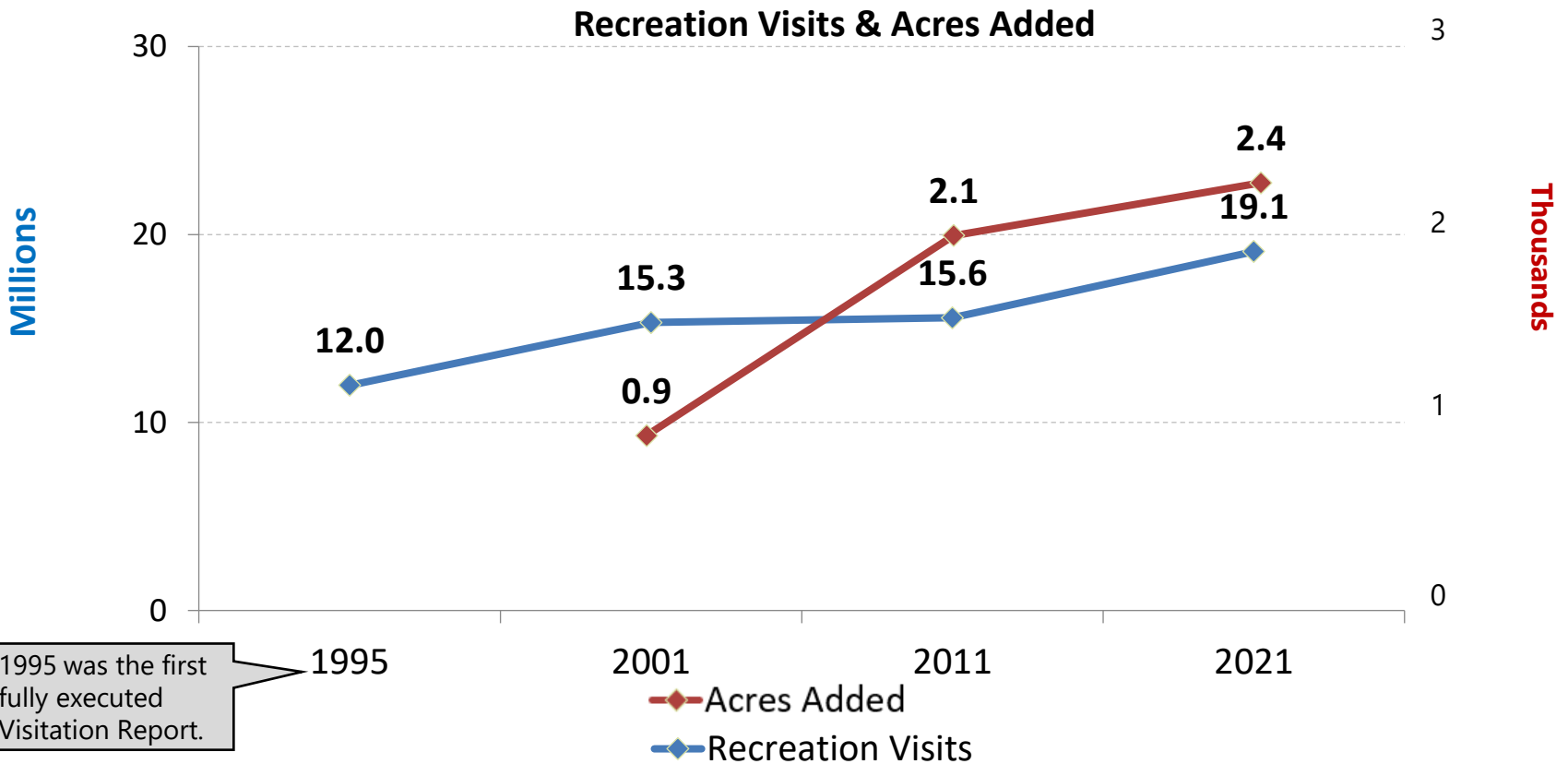
■ 1991 ■ 2001 ■ 2011 ■ 2021

- There were more out-of-county respondents, which directly correlates with travel times being longer, and differences in park usage frequency.
- Nearly 20% of out-of-county respondents were intercepted at the Lakefront Reservations, with 10% intercepted specifically at Edgewater Park.
- Recreation Visits to Cleveland Metroparks in 2011 were 15.6M compared to 19.1M in 2021, which is nearly a 3.5M difference.
 - 77% of 15.6M recreation visits in 2011 equates to 12M, while 58% of 19.1M recreation visits in 2021 equates to 11.1M. Visitation from Cuyahoga County residents did not see a significant decrease.



Intercept Survey Background

- Recreation Visits have increased nearly 7.2M from 1995 to 2021. As acreage has been added, Recreation Visits have increased.
- Over the last 10 years Cleveland Metroparks has grown over 2,300 acres, including acreage on county borders that could increase out-of-county visitation; the addition of Acacia in 2012 and improved trail connectivity (i.e. Valley Parkway Connector from Mill Stream Run to Brecksville).
 - The Lakefront Reservations are also a destination location with people willing to travel further distances to visit.

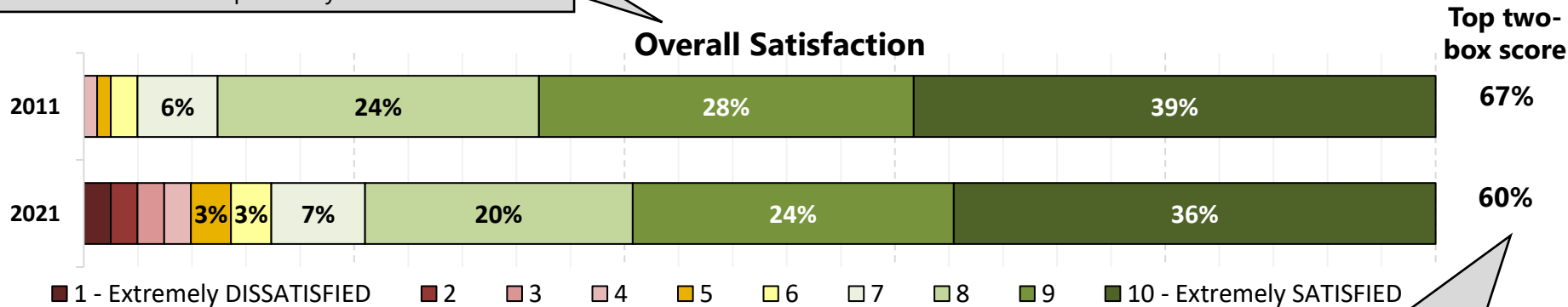


Intercept Survey – Overall Satisfaction

- Park visitation remains high, especially among more frequent users.
- In 2021, 23% of respondents were first time or light users compared to 11% in 2011.
 - First time or newer user experiences would have been during the COVID-19 pandemic when Cleveland Metroparks had the highest visitation partnered with limited seasonal staffing. This resulted in unfamiliar guests, restroom closures, delayed trash pickup/removal and overcrowding.
- 2021 demographics were younger and more diverse. These audiences rated their experience more critically.

• In 1991 this question was asked on a 5-point scale. 50% of respondents were extremely satisfied with the park they visited.

Overall Satisfaction



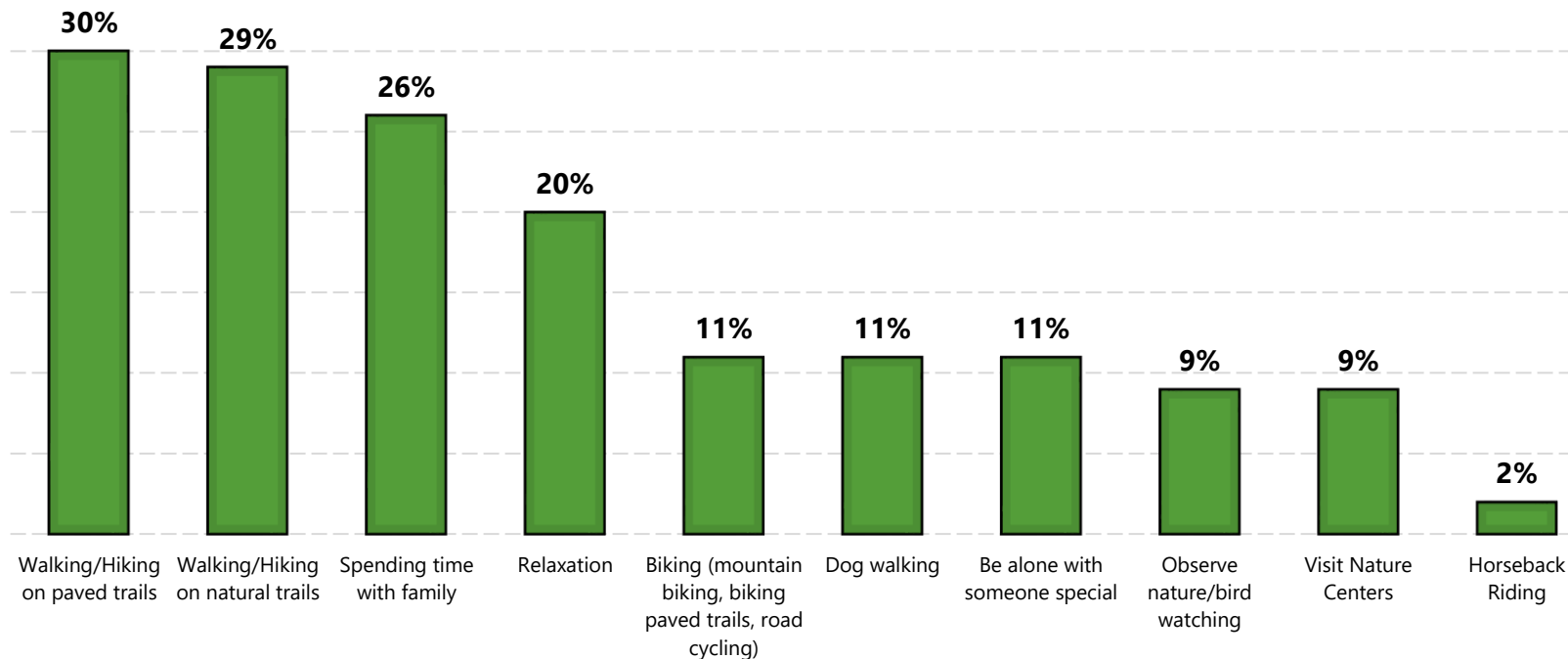
• Respondents who had not visited prior to 2020 rated their overall satisfaction a 41% when looking at top two-box scores. This can be attributed to the first time/newer user experiences mentioned above.

Intercept Survey – Reasons for Visiting the Park

- The trails, both paved and natural surface trails, remain the biggest draw to Cleveland Metroparks.
- In 2021 an effort was made to gather more descriptive data.
 - In the previous studies, walking and hiking were one category and an adjustment was made to differentiate between paved and natural surface trails.
 - Biking was also one category in the past, and an adjustment was made to differentiate between mountain biking, biking paved trails and road cycling.
- Spending time with family (+13%) and biking (+7%) saw the biggest increases from 2011.

Main Reason for Visiting the Park

**Respondents could select up to 3 choices*



Intercept Survey – Park Program Interest

■ 2011 ■ 2021

Attributes denoted with an asterisk (*) were new additions in 2021

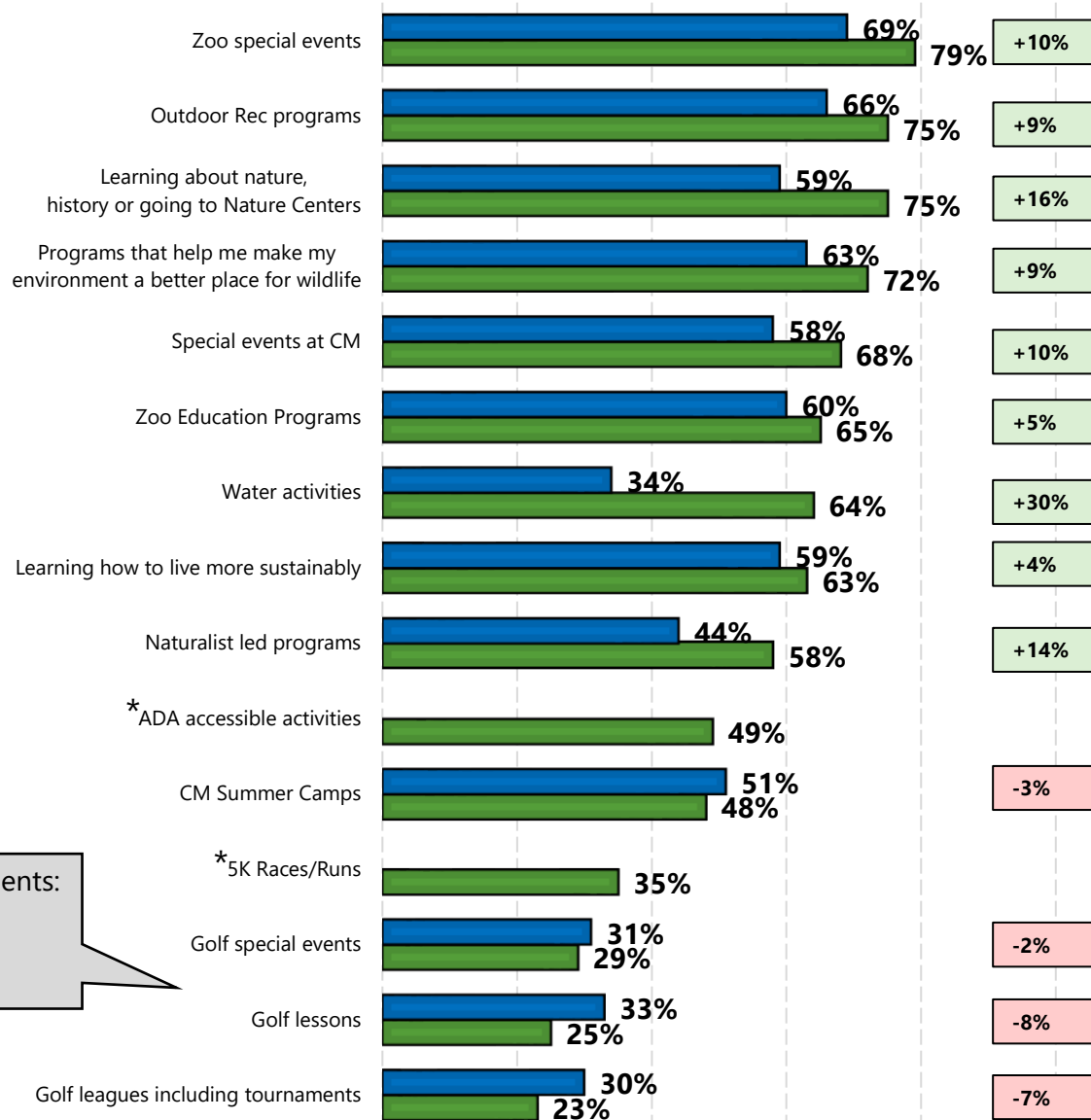
- When comparing 2011 to 2021, nearly all park programs saw an increase in interest levels.
- The largest increases in interest were seen in the following areas:
 - Water activities
 - Learning about nature/history or going to Nature Centers
 - Naturalist led programming
- Female respondents were less interested in golf activities than male respondents, and there were more total female respondents in 2021 than in 2011.

When looking at male respondents:

- Golf special events: 32%
- Golf lessons: 29%
- Golf leagues: 28%

Q: Please tell me if you or any member of your household has an interest in the following Cleveland Metroparks programs.

Interest in Park Programs



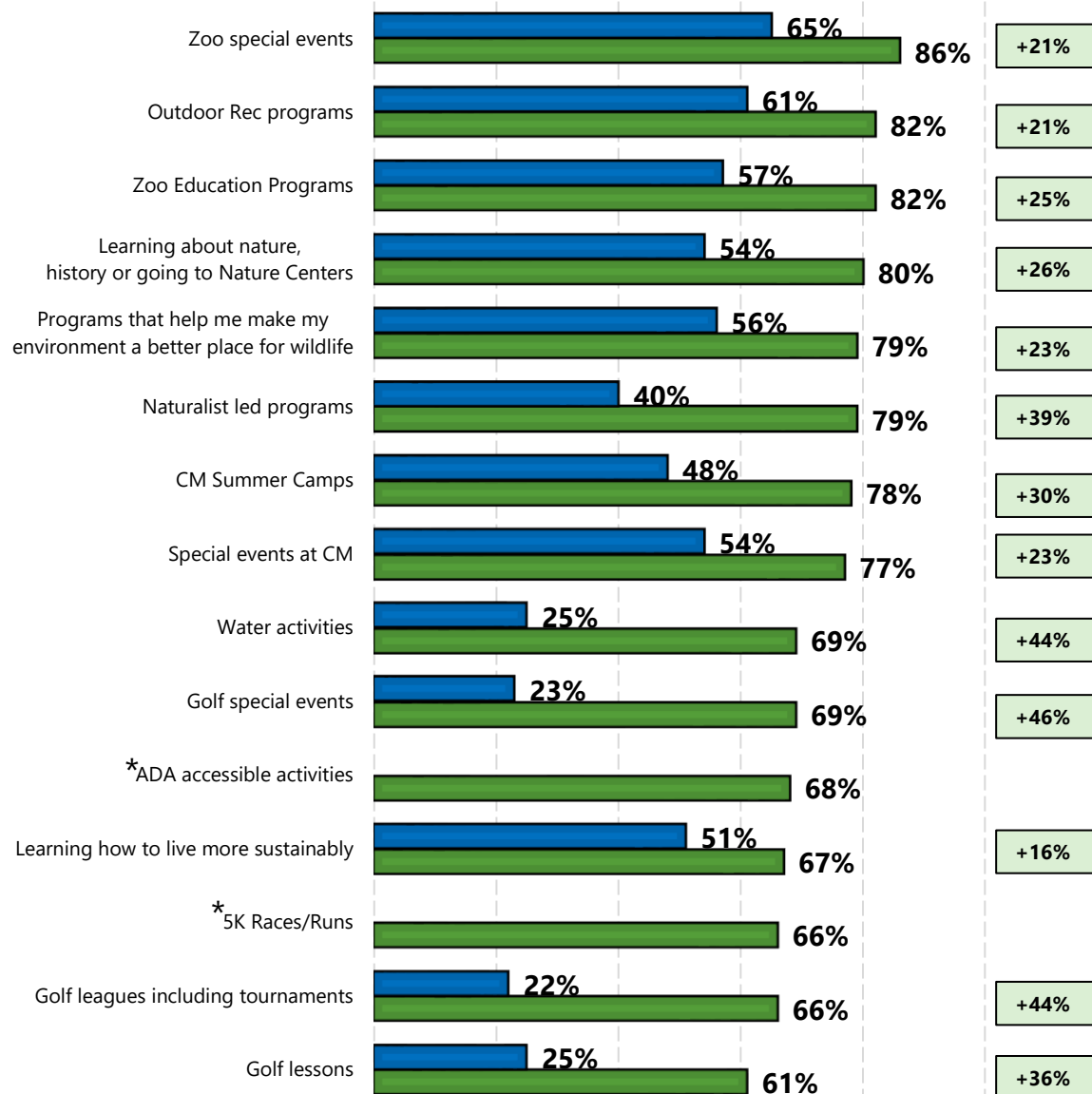
Intercept Survey – Preferred Provider

■ 2011 ■ 2021

Attributes denoted with an asterisk (*) were new additions in 2021

- When comparing 2011 to 2021, all park programs saw an increase in being the preferred provider for the community.
- The largest increases were seen in the following areas:
 - Golf special events
 - Water activities
 - Golf leagues including tournaments

Is CM Preferred Provider



Q: Do you agree or disagree that Cleveland Metroparks is the preferred provider of this program in this area?

Next Steps

- Based off 2021 In-Park Intercept Survey responses, there is an interest in diving deeper into specific findings in the future.
- Findings from the In-Park Intercept study showed differences in responses to various survey questions when looking at different races/ethnicities and age groups.
 - Diversity and Park Use
 - The purpose of this study would be to describe patterns in use and non-use of the park system specifically race/ethnicity and age.
 - While Cleveland Metroparks continues to make strong efforts to be inclusive, this study would also assist us in effectively serving diverse and younger populations for future generations.

Appendix

Intercept Survey Background

- The intercept study began in 1991 and has been conducted every ten years since
- This is the fourth time this study has been completed, providing Cleveland Metroparks with over forty years' worth of data

