

National Benchmarking

Since 1998, Leisure Vision (a division of ETC Institute) has conducted household surveys for needs assessments, feasibility studies, customer satisfaction, fees and charges comparisons, and other parks and recreation issues in more than 200 communities in over 35 states across the country.

The results of these surveys has provided an unparalleled data base of information to compare responses from household residents in client communities to “National Averages” and therefore provide a unique tool to “assist organizations in better decision making.”

Communities within the data base include a full-range of municipal and county governments from 20,000 in population through over 1 million in population. They include communities in warm weather climates and cold weather climates, mature communities and some of the fastest growing cities and counties in the country.

Communities within the following states are included within the National Benchmarking data base.

- **Arizona**
- **Arkansas**
- **California**
- **Colorado**
- **Connecticut**
- **Florida**
- **Georgia**
- **Kansas**
- **Kentucky**
- **Idaho**
- **Illinois**
- **Indiana**
- **Iowa**
- **Maine**
- **Massachusetts**
- **Michigan**
- **Minnesota**
- **Mississippi**
- **Missouri**
- **Montana**
- **Nevada**
- **New Hampshire**
- **New Jersey**
- **North Carolina**
- **Ohio**
- **Oklahoma**
- **Oregon**
- **Pennsylvania**
- **Rhode Island**
- **South Carolina**
- **Texas**
- **Utah**
- **Vermont**
- **Virginia**
- **Washington**
- **Wyoming**

“National Averages” have been developed for numerous strategically important parks and recreation planning and management issues including: customer satisfaction and usage of parks and programs; methods for receiving marketing information; reasons that prevent members of households from using parks and recreation facilities more often; priority recreation programs, parks, facilities and trails to improve or develop; priority programming spaces to have in planned community centers and aquatic facilities; potential attendance for planned indoor community centers and outdoor aquatic centers; etc.

Results from household responses for Loudoun County, the City of Fairfax, and the City of Falls Church were compared to National Benchmarks, as well as other communities in the state of Virginia such as the City of Alexandria, Arlington County and Fairfax County. A summary of all tabular comparisons are shown on pages 3-10.

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Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Have you or members of your household visited any City/County parks over the past year?</u>								
Yes	70%	72%	76%	72%	66%	75%	80%	75%
No	30%	28%	24%	28%	21%	25%	20%	25%
<u>Overall rating of quality of parks</u>								
Excellent	39%	38%	53%	30%	27%	30%	NA	25%
Good	51%	51%	39%	54%	52%	55%	NA	62%
Fair	8%	10%	7%	12%	19%	12%	NA	12%
Poor	2%	1%	1%	2%	2%	2%	NA	1%
Don't know	0%	0%	0%	2%	0%	1%	NA	1%
<u>Have you or members of your household participated in City/County programs during the past year?</u>								
Yes	48%	45%	43%	29%	42%	44%	NA	25%
No	52%	55%	57%	71%	58%	56%	NA	75%
<u>Overall rating of quality of programs</u>								
Excellent	38%	50%	45%	33%	28%	37%	NA	32%
Good	52%	46%	47%	54%	60%	53%	NA	59%
Fair	8%	2%	4%	10%	9%	6%	NA	7%
Poor	0%	0%	0%	2%	1%	1%	NA	1%
Don't Know	2%	2%	4%	1%	2%	3%	NA	1%

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Where respondents learned about recreation programs</u>								
Authority's brochure	20%	32%	29%	48%	19%	40%	NA	53%
Word of mouth	35%	32%	39%	41%	36%	36%	NA	49%
Newspaper	26%	18%	37%	38%	32%	26%	NA	43%
Flyers/brochures	46%	42%	28%	34%	48%	37%	NA	30%
Visited/called a parks & rec office	16%	13%	12%	17%	18%	3%	NA	26%
Website	22%	23%	6%	9%	8%	14%	NA	20%
Radio	0%	1%	2%	9%	4%	2%	NA	15%
Cable television	1%	3%	0%	8%	3%	7%	NA	16%
<u>Organizations used for parks and recreation programs and facilities</u>								
National Parks	48%	50%	54%	NA	40%	NA	NA	NA
City/County Parks and Recreation Department	57%	60%	65%	48%	45%	NA	NA	51%
Northern Virginia Regional Park Authority	42%	44%	51%	NA	25%	NA	NA	NA
Churches	30%	32%	28%	32%	31%	NA	NA	32%
Public Schools	34%	26%	25%	27%	NA	NA	NA	30%
Private clubs (tennis, health, & fitness)	29%	31%	35%	23%	25%	NA	NA	27%
YMCA/YWCA	8%	2%	3%	19%	13%	NA	NA	11%
Neighborhood association	39%	35%	11%	13%	25%	NA	NA	14%
Private Schools	9%	7%	8%	10%	NA	NA	NA	NA
Scouts and Boy & Girls Clubs	13%	8%	6%	7%	NA	NA	NA	NA
Boys and Girls Club	1%	2%	0%	4%	1%	NA	NA	1%

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Reasons preventing households from using parks and recreation facilities more often</u>								
We are too busy or not interested	30%	38%	42%	34%	41%	26%	NA	30%
I do not know what is being offered	26%	14%	15%	21%	25%	19%	NA	28%
Facilities are not close to our residence	31%	12%	16%	16%	13%	9%	NA	18%
Use private facilities	17%	16%	17%	15%	NA	5%	NA	12%
Program times are not convenient	17%	16%	7%	14%	14%	NA	NA	21%
I do not know locations of parks/facilities	14%	8%	12%	13%	19%	13%	NA	16%
Fees are too expensive for program	11%	10%	9%	11%	7%	4%	NA	13%
Security is insufficient	3%	4%	3%	7%	7%	7%	NA	9%
Facilities do not have the right equipment	7%	4%	8%	7%	8%	5%	NA	10%
Lack of quality programs	9%	5%	7%	7%	6%	5%	NA	11%
Hours of operatin are not convenient	9%	8%	3%	7%	7%	7%	NA	9%
Facilities are not well maintained	4%	5%	3%	6%	6%	5%	NA	8%
Lack of transportation	3%	3%	3%	4%	4%	3%	NA	3%
Registration for programs is difficult	7%	2%	1%	3%	2%	2%	NA	5%
Poor customer service by staff	3%	1%	1%	3%	4%	NA	NA	6%

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Parks and recreation facilities that respondent households have a need for</u>								
Paved walking and biking trails	75%	66%	79%	69%	NA	NA	64%	66%
Small community parks	68%	70%	70%	60%	NA	NA	66%	57%
Nature centers and natural areas	59%	56%	60%	58%	NA	NA	54%	56%
Large regional parks	69%	53%	50%	55%	NA	NA	59%	49%
Picnic shelters/areas	58%	47%	47%	54%	NA	NA	47%	56%
Historical sites and museums	59%	60%	56%	52%	NA	NA	52%	NA
Indoor exercise and fitness facilities	60%	46%	48%	47%	NA	NA	48%	45%
Unpaved hiking trails	46%	45%	45%	46%	NA	NA	40%	NA
Indoor pools for recreation swimming	63%	46%	48%	45%	NA	NA	52%	46%
Outdoor swimming pools/water parks	55%	38%	42%	43%	NA	NA	34%	36%
Playgrounds	51%	42%	37%	43%	NA	NA	34%	38%
Performing Arts Venue	39%	45%	39%	39%	NA	NA	NA	41%
Horticultural centers/public gardens	34%	38%	41%	34%	NA	NA	33%	NA
Golf courses/driving ranges	38%	26%	24%	30%	NA	NA	27%	26%
Outdoor basketball/multi-use courts	34%	26%	25%	25%	NA	NA	21%	24%
Tennis courts	36%	25%	31%	25%	NA	NA	26%	26%
Boat launch and rental sites	25%	18%	14%	25%	NA	NA	NA	15%
Off-leash dog parks	25%	21%	19%	25%	NA	NA	20%	27%
Baseball/softball fields	30%	22%	20%	22%	NA	NA	20%	18%
Soccer/lacrosse/field hockey/football fields	41%	23%	23%	22%	NA	NA	19%	24%
Senior Centers	22%	25%	22%	21%	NA	NA	NA	22%
Meeting Space for receptions/conferences	26%	20%	24%	20%	NA	NA	NA	29%
Teen Centers	25%	17%	21%	19%	NA	NA	NA	11%
Outdoor Equestrian Facility and trails	15%	12%	8%	12%	NA	NA	14%	NA
Campgrounds	30%	19%	14%	NA	NA	NA	NA	NA
Cabin/Cottage Rentals	21%	13%	9%	NA	NA	NA	NA	NA
Rowing/Crew facilities	10%	9%	10%	NA	NA	NA	NA	NA

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Most important parks and recreation facilities (sum of importance percentages)</u>								
Paved walking and biking trails	37%	35%	48%	41%	55%	NA	37%	37%
Small community parks	18%	35%	28%	30%	40%	NA	29%	23%
Playgrounds	20%	17%	13%	22%	20%	NA	17%	19%
Nature centers and natural areas	13%	15%	15%	21%	NA	NA	19%	24%
Large regional parks	21%	15%	12%	20%	20%	NA	28%	17%
Unpaved hiking trails	15%	19%	15%	19%	NA	NA	17%	NA
Indoor exercise and fitness facilities	21%	19%	13%	19%	NA	NA	21%	20%
Picnic shelters/areas	10%	8%	11%	19%	20%	NA	9%	18%
Outdoor swimming pools/water parks	18%	15%	20%	17%	7%	NA	8%	11%
Indoor pools for recreation swimming	26%	19%	18%	17%	19%	NA	29%	19%
Golf courses/driving ranges	11%	10%	8%	14%	NA	NA	14%	12%
Performing Arts Venue	10%	11%	11%	12%	NA	NA	NA	11%
Off-leash dog parks	11%	7%	6%	11%	14%	NA	9%	13%
Historical sites and museums	11%	15%	14%	10%	NA	NA	16%	NA
Horticultural centers/public gardens	5%	8%	8%	10%	NA	NA	8%	NA
Senior Centers	9%	13%	12%	9%	NA	NA	NA	8%
Soccer/lacrosse/field hockey/football fields	19%	8%	9%	8%	5%	NA	10%	9%
Baseball/softball fields	9%	7%	6%	7%	4%	NA	NA	8%
Tennis courts	6%	5%	7%	7%	12%	NA	7%	9%
Boat launch and rental sites	5%	3%	2%	6%	NA	NA	NA	4%
Teen Centers	5%	3%	5%	6%	NA	NA	NA	2%
Outdoor basketball/multi-use courts	8%	5%	7%	6%	NA	NA	4%	5%
Meeting Space for receptions/conferences	3%	2%	7%	4%	NA	NA	NA	6%
Outdoor Equestrian Facility and trails	3%	1%	2%	3%	NA	NA	2%	NA
Campgrounds	4%	2%	1%	NA	NA	NA	NA	NA
Cabin/Cottage Rentals	2%	0%	2%	NA	NA	NA	NA	NA
Rowing/Crew facilities	1%	1%	0%	NA	NA	NA	NA	NA

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Recreation programs that respondent households have a need for</u>								
Adult fitness and wellness programs	46%	46%	42%	47%	NA	NA	NA	NA
Special events	30%	30%	31%	41%	NA	NA	NA	NA
Nature programs/environmental education	34%	36%	28%	35%	NA	NA	NA	NA
Local history programs	34%	37%	33%	NA	NA	NA	NA	NA
Water fitness programs	34%	31%	28%	29%	NA	NA	NA	NA
Youth sports programs	39%	22%	15%	26%	NA	NA	NA	NA
Adult arts, dance, performing arts	20%	26%	16%	23%	NA	NA	NA	NA
Seniors/Adult programs for 50 years and older	15%	23%	12%	23%	NA	NA	NA	NA
Youth Learn to Swim programs	33%	19%	18%	22%	NA	NA	NA	NA
Adult sports programs	30%	21%	14%	22%	NA	NA	NA	NA
Golf lessons and leagues	25%	20%	16%	21%	NA	NA	NA	NA
Tennis lessons and leagues	25%	17%	19%	19%	NA	NA	NA	NA
Youth summer camp programs	31%	19%	14%	19%	NA	NA	NA	NA
Youth art, dance, performing arts	21%	19%	16%	17%	NA	NA	NA	NA
Youth fitness and wellness programs	25%	13%	13%	17%	NA	NA	NA	NA
Birthday parties	20%	14%	12%	15%	NA	NA	NA	NA
Martial arts programs	18%	10%	5%	15%	NA	NA	NA	NA
Gymnastics/tumbling programs	18%	12%	8%	15%	NA	NA	NA	NA
Boating lessons	17%	15%	10%	NA	NA	NA	NA	NA
Before and after school programs	19%	12%	6%	14%	NA	NA	NA	NA
Preschool programs	21%	12%	8%	14%	NA	NA	NA	NA
Programs for people with disabilities	10%	7%	8%	11%	NA	NA	NA	NA
Agricultural interpretation programs	11%	12%	9%	NA	NA	NA	NA	NA
Equestrian riding lessons	12%	11%	6%	NA	NA	NA	NA	NA
Scuba training	14%	10%	3%	NA	NA	NA	NA	NA
Skeet/trap lessons	11%	10%	4%	NA	NA	NA	NA	NA

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Most important recreation programs (sum of importance percentages)</u>								
Adult fitness and wellness programs	23%	30%	29%	29%	NA	NA	NA	NA
Special events	9%	12%	17%	23%	42%	NA	NA	NA
Nature programs/environmental education	13%	18%	11%	15%	6%	NA	NA	NA
Youth sports programs	22%	11%	12%	14%	NA	NA	NA	NA
Seniors/Adult programs for 50 years and older	7%	17%	8%	14%	10%	NA	NA	NA
Water fitness programs	11%	15%	13%	12%	NA	NA	NA	NA
Local history programs	11%	19%	18%	NA	NA	NA	NA	NA
Youth Learn to Swim programs	18%	9%	10%	11%	NA	NA	NA	NA
Golf lessons and leagues	12%	7%	8%	10%	NA	NA	NA	NA
Adult arts, dance, performing arts	8%	13%	10%	10%	NA	NA	NA	NA
Adult sports programs	15%	7%	4%	9%	NA	NA	NA	NA
Youth summer camp programs	15%	9%	7%	9%	7%	NA	NA	NA
Tennis lessons and leagues	8%	6%	8%	8%	9%	NA	NA	NA
Before and after school programs	10%	6%	2%	6%	5%	NA	NA	NA
Preschool programs	12%	6%	2%	6%	3%	NA	NA	NA
Youth art, dance, performing arts	6%	8%	7%	6%	NA	NA	NA	NA
Youth fitness and wellness programs	8%	5%	8%	6%	NA	NA	NA	NA
Programs for people with disabilities	3%	2%	3%	4%	2%	NA	NA	NA
Martial arts programs	6%	2%	3%	4%	NA	NA	NA	NA
Birthday parties	5%	3%	2%	4%	NA	NA	NA	NA
Agricultural interpretation programs	3%	3%	5%	NA	NA	NA	NA	NA
Boating lessons	4%	4%	3%	NA	NA	NA	NA	NA
Gymnastics/tumbling programs	5%	4%	2%	4%	NA	NA	NA	NA
Equestrian riding lessons	4%	4%	2%	NA	NA	NA	NA	NA
Skeet/trap lessons	3%	3%	3%	NA	NA	NA	NA	NA
Scuba training	4%	2%	2%	NA	NA	NA	NA	NA

Parks and Recreation Benchmarking for Needs Assessment Surveys

	Loudoun County	City of Fairfax	City of Falls Church	National Average	City of Alexandria	Arlington County	Fairfax County	Other Virginia Communities
<u>Overall satisfaction with the value households receive from the Parks and Recreation Department</u>								
Very Satisfied	37%	22%	35%	26%	NA	NA	NA	18%
Somewhat Satisfied	35%	41%	36%	34%	NA	NA	NA	34%
Neutral	13%	16%	13%	20%	NA	NA	NA	27%
Somewhat Dissatisfied	2%	9%	2%	5%	NA	NA	NA	6%
Very Dissatisfied	0%	3%	2%	2%	NA	NA	NA	2%
Don't Know	13%	9%	12%	13%	NA	NA	NA	13%