Introduction:

Ballard*King & Associates (B*K) has entered into a contract with the City of Eugene Parks & Recreation Department (City). The City is in the midst of an in-house Parks & Recreation Master Plan process and has contracted with B*K to provide additional information to supplement that report. The specific information that B*K has been asked to provide is trend information in the areas of sports and recreation, passive and active programming, and both indoor and outdoor facility trends.

The following pages contain that information broken into sections.

Indoor Recreation Facility Trends:

Due to the increasing recreational demands there has been a shortage in most communities of the following spaces:

- Gymnasiums
- Pools (especially leisure pools)
- Weight/cardiovascular equipment areas
- Indoor running/walking tracks
- Meeting/multipurpose (general program) space
- Senior's program space
- Pre-school and youth space
- Teen use areas
- Fieldhouse (indoor turf)

As a result, many communities have attempted to include these amenities in public community recreation facilities. With the growth in youth sports and the high demand for school gyms, most communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most parks and recreation departments is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the retiree-senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active senior (usually age 55-70) is paramount, as this age group has the free time available to participate in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services. This segment of the population is staying active longer so in programming to meet their needs it is important to maintain some of the traditional "senior" activities, but also broaden the programs and increase the activity level.

Youth programming has always been a cornerstone for recreation services and will continue to be so with an increased emphasis on teen needs and providing a deterrent to juvenile crime. With a continuing increase in single parent households and two working parent families, the needs of school age children for before and after school child care continues to grow as does the need for preschool programming. A common theme in the development of a community center is the need to do something for teens. Unfortunately the group of teens that "need" something to do are not attracted to the rules and restrictions that surround a public facility like a community focused recreation center.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. One of the other issues of competition comes from the non-profit sector (primarily YMCA's but also JCC's, and others), where the market is much closer to that of the public providers. While not as vociferous as the private providers, the non-profits have also often expressed concern over public community recreation centers. What has resulted from this is a strong growth in the number of partnerships that have occurred between the public and non-profit sector in an attempt to bring the best recreation amenities to a community.

The hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, current channels, fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings has been greatly diminished. Leisure pools appeal to the younger children (who are the largest segment of the population that swim) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 20% to 25% more revenue than a comparable conventional pool and the cost of operation, while being higher, has been offset through increased revenues. Of note is the fact that patrons seem willing to pay a higher user fee at a leisure pool than a conventional aquatics facility.

Another trend that is growing more popular in the aquatic's field is the development of a raised-temperature therapy pool for rehabilitation programs. This has usually been done in association with a local health care organization or a physical therapy clinic. The medical organization either provides capital dollars for the construction of the pool or agrees to purchase so many hours of pool time on an annual basis. This form of partnership has proven to be appealing to both the medical side and the organization that operates the facility. The medical sector receives the benefit of a larger aquatic center, plus other amenities that are available for their use, without the capital cost of building the structure. In addition, they are able to develop a much stronger community presence away from traditional medical settings. The facility operators have a stronger marketing position through an association with a medical organization and a user group that will provide a solid and consistent revenue stream for the center. This is enhanced by the fact that most therapy use times occur during the slower mid-morning or afternoon times in the pool and the center.

Despite the recent emphasis on recreational swimming and therapy, the more traditional aspects of aquatics (including swim teams, instruction and aqua fitness) remain as the foundation for many aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive swim team programs through USA Swimming, high schools, and other community based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.

The multi-function indoor aquatic center concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of aquatics activities and programs in an open design setting that features a lot of natural light, interactive play features and access to an outdoor sundeck. The placing of traditional instructional/competitive pools, with shallow depth/interactive leisure pools and therapy water, in the same facility has been well received in the market. This idea has proven to be financially successful by centralizing pool operations for recreation service providers and through increased generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting. Indoor aquatic centers have been instrumental in developing a true family appeal for community-based facilities. The keys to success for this type of center revolve around the concept of intergenerational use in a quality facility that has an exciting and vibrant feel in an outdoor like atmosphere.

Also changing is the orientation of aquatic centers from stand-alone facilities that only have aquatic features to more of a full-service recreation center that has fitness, sports and community based amenities. This change has allowed for a better rate of cost recovery and stronger rates of use of the aquatic portion of the facility as well as the other "dry side" amenities. The two areas of the country where agencies still attempt to develop stand-alone aquatic facilities on a consistent basis are in the Pacific Northwest and the Southwest. The Southwest has been considerably more successful in that those facilities can be outdoors and don't come with the full complement of associated utility costs.

Community Center Benchmarks:

Based on market research conducted by Ballard*King & Associates at community centers across the United States, the following represents the basic benchmarks.

- The majority of community centers that are being built today are between 65,000 and 75,000 square feet. Most centers include three primary components A) A pool area usually with competitive and leisure amenities, B) Multipurpose gymnasium space, and C) Weight/cardiovascular equipment area. In addition, most centers also have group exercise rooms, drop-in childcare, and classroom and/or community spaces.

- For most centers to have an opportunity to cover all of their operating expenses with revenues, they must have a service population of at least 50,000 and an aggressive fee structure.

- Most centers that are between 65,000 and 75,000 square feet have an operating budget of between $1,500,000 and $1,800,000 annually. Nearly 65% of the operating costs are from personnel services, followed by approximately 25% for contractual services, 8% for commodities, and 2% for capital replacement.

- For centers that serve a more urban population and have a market driven fee structure, they should be able to recover 70% to 100% of operating expenses. For centers in more rural areas the recovery rate is generally 50% to 75%. Facilities that can consistently cover all of their operating expenses with revenues are rare. The first true benchmark year of operation does not occur until the third full year of operation.

- The majority of centers of the size noted (and in an urban environment) above average daily paid attendance of 800 to as much as 1,000 per day. These centers will also typically sell between 800 and 1,500 annual passes (depending on the fee structure and marketing program).

- It is common for most centers to have a three-tiered fee structure that offers daily, extended visit (usually punch cards) passes, and annual passes. In urban areas it is common to have resident and non-resident fees. Non-resident rates can cost 25% to 50% higher than the resident rate and are usually a topic of discussion amongst elected officials. Daily rates for residents average between $3.00 and $6.00 for adults, $3.00 and $4.00 for youth and the same for seniors. Annual rates for residents average between $200 and $300 for adults, and $100 and $200 for youth and seniors. Family annual passes tend to be heavily discounted and run between $350 and $800.

- Most centers are open an average of 105 hours a week, with weekday hours being 5:00 am to 10:00 pm, Saturdays 8:00 am to 8:00 pm and Sundays from noon to 8:00 pm. There is now a trend to open earlier on Sundays as well. Often hours are shorter during the summer months.

Note: These statistics vary by regions of the country.

Recreation Facilities Market Orientation:

Based on the demographic makeup of the service areas and the trends in indoor recreation amenities, there are specific market areas that need to be addressed with such community facilities. These include:

General:

1. **Drop-in Recreation Activities** - Critical to the basic operation of any community center is the availability of the facility for drop-in use by the general public. This requires components that support drop-in use and the careful scheduling of programs and activities to ensure that they do not dominate the center and exclude the drop-in user. The sale of annual passes and daily admissions, potential strong revenue sources for a center, requires a priority for drop-in use.

2. **Instructional Programming** - The other major component of a community center's operation is a full slate of programs in a variety of disciplines. The center should provide instruction for a broad based group of users in a number of program areas. The primary emphasis should be on teaching basic skills with a secondary concern for specialized or advanced instruction.

3. **Special Events** - There should be a market for special events including kid's birthday parties, community organization functions, sports tournaments and other special activities. The development of this market will aid significantly in the generation of additional revenues and these events can often be planned for before or after regular operating hours or during slow use times of the year. Care should be taken to ensure that special events do not adversely impact the everyday operations of the center.

4. **Community Rentals** - Another aspect of a center's operation is providing space for rentals by civic groups or organizations as well as the general public. Gyms and multi-purpose rooms can be used as a large community gathering space and can host a variety of events from seminars, parties, receptions, arts and crafts sales and other events. It is important that a well-defined rental fee package is developed and the fee schedule followed closely. Rentals should not be done at the expense of drop-in use or programming in the center.

5. **Social Welfare Programs** – An emerging area for many centers is the use of space for social service activities and programs. Special population activities, teen and senior assistance programs, childcare and other similar uses are now common in many facilities.

Specific Market Segments Include:

1. **Families** - Within most markets an orientation towards family activities is essential. The ability to have family members of different ages participate in a variety of activities together or individually, is the challenge.

2. **Pre-School Children** - The needs of pre-school age children need to be met with a variety of activities and programs designed for their use. From drop-in childcare to specialized pre-school classes, a number of such programs can be developed. Interactive programming involving parents and toddlers can also be beneficial. It is significant that this market usually is active during the mid-morning time frame, providing an important clientele to the facility during an otherwise slow period of the day. For parents with small children who wish to participate in their own activities, babysitting services are often necessary during the morning and early evening time slots.

3. **School Age Youth** - Recreation programming has tended to concentrate on this market segment and this age group should be emphasized at a center as well. This group requires a wide variety of programs and activities that are available after school, during the summer, or during weekend hours. Instructional programs and competitive sports programs are especially popular, as well as drop-in use of the facility.

4. **Teens** - A major focus of many community center projects is on meeting the needs of teenagers in the community. There is a great debate among recreation providers throughout the country on how to best provide recreation programming for this age group. Some believe that dedicated teen space is required to meet their needs while others find that it is the activities and approach that is more important. Serving the needs of this age group will often require the use of many areas of the center at certain "teen" times of use.

5. **Seniors** - As the population of the United States and the service areas continue to age, continuing to meet the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Social programs as well as weight training and cardiovascular conditioning have proven to be popular with this age group. Again, the fact that this market segment will usually utilize a facility during the slower use times of early to mid-day also is appealing. Providing services for this age group should be more of a function of time than space.

6. **Business/Corporate** - This market has a variety of needs from fitness/wellness and instruction, to recreation and social. The more amenities and services that can be offered at one location the more appeal there is to this market segment. The business community should be surveyed to determine their specific needs and expectations.

7. **Special Needs Population** - This is a secondary market, but with the A.D.A. requirements and the existence of a number of recreation components, the amenities will be present to develop programs for this population segment. Association with health care providers and/or other social service agencies will be necessary to fully reach this market.

8. **Special Interest Groups** - This is a market that needs to be explored to determine the use potential from a variety of groups. These could include school functions, social service organizations and adult and youth sports teams. While the needs of these groups can be great, their demands on a center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

Outdoor Facility Trends

Many communities are not only making investments in their indoor facility inventory, but an equal investment in outdoor facilities as well. The following outlines some of the trends that B*K sees on a national level with outdoor facilities and programs.

Natural Areas: Specific to parks there is still the traditional idea and value to having open natural areas that members of the community can access. In many cases these nature parks are standalone facilities that individuals can drive to. However, there is also a movement to incorporate natural spaces into active parks. Regardless of the method by which these spaces are preserved it is not uncommon for there to be an interconnected trail system that ties into the community or a regional system. These parks typically include directional signage and identify various plant species. It is also common that throughout the park there is signage that identifies natural habitats of plants and/or animals. The maintenance requirements of these parks is relatively low outside of the trail systems and these are typically referred to as a community asset.

Green Space: It is not uncommon to find green space within a natural area. Green spaces are areas that require more maintenance/mowing than previously reference natural areas. They are mowed on a more frequently basis. These spaces typically move with the topography of the land so as to include changes in grade along with flat spaces. These green space areas are typically not graded so as to provide optimal flat, field-oriented playing spaces. When grading is done in these areas it is to accommodate trails or incorporate other outdoor spaces such as an amphitheater. Along with natural areas green spaces are a community asset and used by both active and passive recreation participants.

Shelters: It is common to find shelters within most parks regardless of their designation. Many agencies will identify a range of shelter sizes that they then distribute throughout their park system. Shelters typically have an area close by with either permanent BBQ facilities or flat pad where individuals can bring their own grill. It is more and more common that shelters are outfitted with electricity. It is also common to find permanent restroom facilities in close proximity to the shelter. As more and more parks are connected to WIFI, shelters and the presence of electricity are natural "hot spots" for this amenity.

Diamonds & Rectangles: Without a doubt diamonds (baseball, softball, etc.) and rectangles (football, lacrosse, soccer, etc.) continue to grow in popularity and are common topics of discussion in developing parks, regardless of the level of park. It is important to note that the demand is increasing in particular in the area of practice fields. In addition to growing in popularity the level of expectations are growing as it relates to the level of care that is expected out of these facilities. The natural tendency is for agencies to try and make their diamonds and rectangles as multi-purpose as possible, but the demand is to have specific facilities for specific sports. This can become particularly challenging if an agency is land locked and has limited ability to acquire new property.

A common approach that agencies are taking to address the concept of multi-purpose and accommodating as many groups as possible is the incorporation of synthetic turf fields within the community inventory. It is also important to note that this approach is being done for both diamonds and rectangles. The benefits of the synthetic turf field is that it increases the "shoulder seasons" of sports that use these fields. Participants can get on the surface immediately after most weather conditions and not have to worry about damaging the playing surface for the remainder of the season, as is the case with natural playing surface. While the shoulder seasons are increased and subsequently the demand is addressed there remains several challenges with a synthetic turf surface. The first challenge is the initial upfront cost of the surface. The second challenge is the longevity of the surface, which varies by manufacturer from 8-15 years and the financial burden of replacement. There is still a significant amount of debate as to whether a synthetic surface is cheaper to operate than a natural grass surface. While the need for mowing is eliminated many professionals are recommending that the fields still be treated with chemicals so that weeds/plants do not grow in the base of the playing surface. Additionally, because of the heat that is absorbed by the playing surfaces many professionals are actually watering the fields prior to use, simply to cool the surface.

In many instances when communities are completing a master plan process and diamonds and rectangles are inventoried an all-inclusive approach is taken. This all-inclusive approach means that not only are the fields that the local parks and recreation agency are responsible for are inventoried but so are the school district facilities, in particular if they are shared-use spaces. In comparison to natural areas and green space there is significantly more maintenance with diamonds and rectangles. In contrast to green space and natural areas, diamonds and rectangles can generate cash flow for the department in the form of rentals and tournaments. There is also the possibility with these spaces to generate a positive economic impact to the community.

It common to find permanent restroom facilities that can serve a significant number of individuals along with permanent concessions in parks that house diamonds and/or rectangles. It is also common with diamonds to see auxiliary facilities such as batting cages in close proximity.

Level of Care: The level of care, or degree to which facilities, in particular diamonds and rectangles, are maintained is a typical topic of conversation. Many agencies have developed a standard to which they are willing to maintain these and other spaces. That standard may vary based upon whether a field is designated as a practice field or competition field, but the standard is adhered to. As the diamonds and rectangles are very often shared-used spaces between community and school district, B*K is also seeing many communities take steps to align the standard between the two agencies. As this standard of care is developed B*K is also seeing a newer trend develop where some youth sports agencies are requesting a higher level. In many cases the agencies are taking the cost associated with higher level of care and re-charging the youth sports organization, or in some instances making the youth sports agency responsible for the maintenance and upkeep of the facility they use while not relinquishing scheduling or ownership of the piece of property.

Trails: Many communities are moving towards the concept of being more environmentally friendly the topic of a walkable or bikeable community comes to the forefront. As such, trails continue to gain popularity across the country. It is important to note that trails can take many forms; from single width walking trails in nature areas to 8 foot wide paved trails. And while the single width trails in nature areas are still popular and prevalent in communities; wider, paved or stone dust, multi-purpose trails are pushing the increase in popularity. When these trails are being developed they can form a loop within a specific park, following stream ways to interconnect multiple parks and in some cases connect into larger county, regional or state-wide park systems. Along with the increase in popularity of trails there is an increase in the pursuit of partnerships with trail development. There are multiple granting agencies that can provide funds for the acquisition of land and the development of trails. As it relates to partnerships those are being realized between government agencies to create larger trails systems or assist in the development and ongoing maintenance of the trail. A good example of this takes place in Johnson County, KS where the county looks to develop the trail system, sometimes on municipal land and subsequently the municipality assumes the maintenance of the trail.

Trails, depending upon their construction and material do take significantly more maintenance than natural areas or green space, but they have not risen to the level of diamonds and rectangles.

Court Space: As parks are being developed B*K still sees the inclusion of court space within active parks. That court space can vary and include, but not be limited to; tennis, basketball, hand ball, pickleball, etc. As B*K does work across the country many court spaces that are not being fully utilized are sometimes repurposed. A common repurpose of basketball or tennis courts is to develop them into a skate park. However, tennis is seeing a resurgence in popularity as the number of Baby Boomers more into retirement and participation in skateboarding continues a slow decline. These spaces typically require a level of maintenance similar to that of trails, mainly due to the surfaces that are employed and the need for resurfacing or patching.

Inside-Out: A significant trend that B*K is seeing nation-wide is bringing traditional inside activities out into parks and open space. The movement of boot camp style of group exercise classes lends itself to using outdoor spaces; trails, green space and other. It is also common to see exercise groups forming and participating in activities like exercise walking and running. Some agencies have gone so far as to have morning Yoga classes in green space or nature areas. Clearly the focus for the inside-out movement is on fitness and that trend is going to continue and grow.

Technology: While it may be counter-intuitive many parks and recreation agencies are incorporating technology into their parks system at the demand of their citizens. The incorporation of WIFI and other technological options within parks is becoming more common place. Many agencies are using shelters as WIFI hotspots because of the presence of power and limited protection from the elements. Some agencies have taken their technology one step further and created interactive maps that can be downloaded to a smartphone or tablet. These maps then assist the user in locating the amenities that are most important to them. The next step that B*K expects some organizations to take is the development of an interactive "app" for smartphones and tablets that can guide patrons through the parks. Such an "app" could assist with navigating an individual park, but also allow the user to query amenities within the park system with the "app" identifying locations.

Sports Participation Numbers & Trends:

On an annual basis the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. The following pages contain information from the latest NSGA survey completed in 2014. It is important to note for purposes of this report that the NSGA collected information on a total of 55 different activities. Not all of those activities have been included in this document, as they are not activities that the City can, or would have interest in providing facilities for in the future.

The following 2 pages provide information on activities, divided by those that have experienced an increase (green) or decrease (red) over the past 10 years. In addition to the percent change B*K has also included a column which designates whether the activities normally takes place indoor, outdoor or both. Note: Some activities do not have a full 10-year history, such activities have footnotes which designates the period of time for the increase or decrease in participation.

Table A – National Activity Trend (in millions) of Increasing Participation

Activity	2005 Participation	2014 Participation	Percent Change	Indoor Outdoor Both
Lacrosse	1.2[1]	2.8	+133.3%	O
Kayaking	5.9[2]	9.0	+52.5%	O
Running/Jogging	29.2	43.0	+47.3%	B
Hockey (ice)	2.4	3.4	+41.7%	I
Yoga	20.7[3]	29.2	+41.1%	I
Gymnastics	3.9[4]	5.4	+38.5%	I
Hiking	29.8	41.1	+37.9%	O
Aerobic Exercising	33.7	44.2	+31.2%	B
Exercise Walking	86.0	104.3	+21.3%	B
Tennis	11.1	12.4	+11.7%	O
Cheerleading	3.3	3.6	+9.1%	B
Workout @ Club	34.7	35.9	+3,5%	I
Exercising w/ Equipment	54.2	55.1	+1.7%	I
Ice/Figure Skating	7.2[5]	7.3	+1.4%	I

2014 Participation: The number of participants per year in the activity (in millions) in the United States.
2005 Participation: The number of participants per year in the activity (in millions) in the United States.
Percent Change: The percent change in the level of participation from 2005 to 2014.
Indoor Outdoor Both: Designates whether an activity's normal participation takes place indoor, outdoor or both.

Many of the activities that are seeing an increase are those that are individual pursuits. Of the activities that are more team oriented their "normal" participants are typically associated with a higher socio-economic status. This is important to point out given the recession that began in 2007-2008. It is also important to point out that many of these activities are embraced by Baby Boomers and retirees. This group is staying active longer and they have the resources to afford leisure activities.

[1] Increase since 2007.
[2] Increase since 2007.
[3] Increase since 2007.
[4] Increase since 2009.
[5] Increase since 2013.

Table B – National Activity Trend (in millions) of Decreasing Participation

Activity	2005 Participation	2014 Participation	Percent Change	Indoor Outdoor Both
Martial Arts / MMA	6.4[6]	6.3	-1.6%	I
Weight Lifting	35.5	34.0	-4.2%	I
Football (touch)	9.3[7]	8.9	-4.3%	O
Soccer	14.1	13.4	-13.4%	O
Football (flag)	6.7[8]	6.3	-6.0%	O
Boxing	3.8[9]	3.4	-10.5%	I
Bicycle Riding	43.1	35.6	-17.4%	B
Basketball	29.9	23.7	-20.7%	B
Swimming	58.0	45.9	-20.9%	B
Baseball	14.6	11.3	-22.6%	O
Volleyball	13.2	10.2	-22.7%	I
Wrestling	3.8[10]	2.9	-23.7%	I
Football (tackle)	9.9	7.5	-24.2%	O
Golf	24.7	18.4	-25.5%	O
Softball	14.1	9.5	-32.6%	O
Mtn Biking (off-road)	9.2	5.4	-41.3%	I
Skateboarding	12.0	5.4	-55.0%	O
In-Line Roller Skating	13.1	4.7	-64.1%	O

2014 Participation: The number of participants per year in the activity (in millions) in the United States.
2005 Participation: The number of participants per year in the activity (in millions) in the United States.
Percent Change: The percent change in the level of participation from 2005 to 2014.
Indoor Outdoor Both: Designates whether an activity's normal participation takes place indoor, outdoor or both.

In contrast to many of the activities that are seeing an increase, many of those that have experienced a decrease are team oriented. While sports like basketball, baseball, softball and football have experienced a 10-year trend of decreasing participation youth sports and the dollars being spent are at an all-time high. Many agencies are making focused efforts to provide practice spaces for these activities. Golf continues a downward trend with the main factors being time and cost to play. Some organizations have converted their facilities to soccer-golf or foot-golf in an effort to make the sport more family oriented.

[6] Decrease since 2013.
[7] Decrease since 2012.
[8] Decrease since 2012.
[9] Decrease since 2013.
[10] Decrease since 2006.

In Table-C on the following page, the 32 activities that have been identified are ordered from highest to lowest level of participation on a national level.

- The rank column designates the national rank out of the 55 activities that data was collected on by the NSGA.
- The participation in millions column is the number of individuals, age 7 and up, that participated in the activity on a national level.
- The age group column illustrates the age category that had the highest level of participation on a national level.
- The largest number column illustrates that within the total percentage of participation the age group that had the highest level participation. In some instances this number is different than the national age group.

In examining this information it will be important for the City to be sure that how they plan to allocate their resources on a long term basis is consistent with not only the demographics of the community but the needs and wants of the community. The University of Oregon being within the City's boundaries presents unique challenges and opportunities. On one hand the student's needs and wants are largely being met with the facilities and services provided on campus. However, as those individuals move off of campus into residential areas they become consumers of City services, to include parks and recreation with a larger focus on parks.

The other value of this information is that it can point to order of magnitude and greatest impact. It is common in a master plan process for trails to be a significant "want" of the community. If the City looks at the popularity of an activity like exercise walking and the percentage of population that participates, a safe assumption could be made that dollars spent on trails would be well received by the community and a wise investment. The opposite assumption can be made if the City begins to look at investing in specialized facilities.

Table C – National Activity Ranking, Participation and Age Group Designation

Activity	Rank	Participation in Millions	Age Group	Largest Number
Exercise Walking	1	104.3	65-74	55-64
Exercise w/ Equipment	2	55.1	25-34	25-34
Swimming	3	45.9	7-11	7-11
Aerobic	4	44.2	25-34	25-34
Running/Jogging	5	43	25-34	25-34
Hiking	6	41.1	25-34	25-34
Workout @ Clubs	8	35.9	18-24	25-34
Bicycle Riding	9	35.6	7-11	7-11
Weight Lifting	11	34	18-24	25-34
Yoga	13	29.2	25-34	25-34
Basketball	14	23.7	12-17	12-17
Golf	17	18.4	65-74	55-64
Soccer	20	13.4	7-11	7-11
Tennis	21	12.4	12-17	25-34
Baseball	23	11.3	7-11	7-11
Volleyball	24	10.2	12-17	12-17
Softball	27	9.5	12-17	12-17
Kayaking	29	9	12-17	25-34
Football (touch)	30	8.9	7-11	12-17
Football (tackle)	32	7.5	12-17	12-17
Ice/Figure Skating	34	7.3	7-11	7-11
Football (flag)	35	6.3	7-11	7-11
Martial Arts/MMA	36	6.3	7-11	7-11
Gymnastics	39	5.4	7-11	7-11
Mtn-Biking (off road)	40	5.4	35-44	35-44
Skateboarding	41	5.4	12-17	12-17
In-Line Roller Skating	44	4.7	7-11	7-11
Cheerleading	46	3.6	7-11	12-17
Boxing	47	3.4	25-34	25-34
Hockey (ice)	48	3.4	18-24	18-24
Wrestling	50	2.9	12-17	12-17
Lacrosse	51	2.8	12-17	12-17

In Table-D on the following page the participation in millions number has been applied to the total population of individuals within the U.S. aged 7 and up and a participation percentage has been created.

In addition to the national participation percentage the NSGA also provides information based upon the region of the country, race and ethnicity. As such B*K has provided that information side by side for comparison purposes.

When looking at the data in Table-D, cells that are shaded green have a higher rate of participation based upon region, race or ethnicity. Equally important, those activities that are shaded red have a lower rate of participation based upon region, race or ethnicity. The ethnic and racial composition of the City will predicate the impact that these participation numbers have on overall success of activities.

It is also important to note that within Table-D there is a row for "Did Not Participate." When administering their survey the NSGA tracks those individuals that "Did Not Participate" in any of the 55 activities identified in their instrument. The City needs to understand that a portion of the community simply will not participate in programs or frequent facilities regardless of what is offered. To have an expectation of 100% participation in parks and recreation is unrealistic at this time.

Table D – National, Pacific, African American & Hispanic Participation Comparison

Activity	National	Pacific	African American	Hispanic
Aerobic	15.3%	16.0%	12.0%	15.4%
Baseball	3.9%	5.0%	2.3%	4.8%
Basketball	8.2%	7.3%	11.9%	7.2%
Bicycle Riding	12.3%	13.7%	6.7%	12.6%
Boxing	1.2%	1.4%	1.7%	2.7%
Cheerleading	1.3%	1.3%	1.4%	1.2%
Exercise Walking	36.2%	37.4%	23.6%	30.3%
Exercise w/ Equipment	19.1%	17.5%	12.2%	16.1%
Football (flag)	2.2%	2.9%	2.0%	2.9%
Football (tackle)	2.6%	1.7%	4.0%	3.5%
Football (touch)	3.1%	2.9%	2.8%	3.4%
Golf	6.4%	6.0%	1.2%	5.0%
Gymnastics	1.9%	2.0%	3.4%	2.4%
Hiking	14.3%	20.4%	2.8%	15.3%
Hockey (ice)	1.2%	0.7%	0.6%	0.8%
Ice/Figure Skating	2.5%	2.8%	1.4%	3.1%
In-Line Roller Skating	1.6%	1.7%	1.7%	1.5%
Kayaking	3.1%	3.5%	0.6%	2.4%
Lacrosse	1.0%	0.5%	1.1%	1.1%
Martial Arts/MMA	2.2%	2.2%	1.7%	2.2%
Mtn-Biking (off road)	1.9%	2.7%	0.9%	2.4%
Running/Jogging	14.9%	14.7%	10.3%	16.9%
Skateboarding	1.9%	3.2%	0.9%	1.8%
Soccer	4.7%	4.8%	2.4%	6.3%
Softball	3.3%	3.7%	2.8%	3.4%
Swimming	15.9%	16.4%	5.9%	12.0%
Tennis	4.4%	4.5%	3.1%	4.1%
Volleyball	3.5%	3.9%	3.3%	3.4%
Weight Lifting	11.8%	11.9%	8.2%	12.3%
Workout @ Clubs	12.5%	12.4%	9.0%	12.0%
Wrestling	1.0%	1.5%	1.0%	1.9%
Yoga	10.1%	12.2%	6.5%	10.3%
Did Not Participate	22.6%	22.1%	28.0%	24.3%

Beyond the NSGA, B*K can access information on adult participation in various activities from our demographic provider ESRI. The following table illustrates those activities that could take place in a parks and recreation environment.

Table E – Market Potential Index for Adult Participation[11]

Activity	Number of Adults	Percentage	MPI
Aerobics	14,592	10.9%	123
Baseball	5,622	4.2%	94
Basketball	11,848	8.9%	107
Bicycling (mountain)	6,468	4.9%	121
Bicycling (road)	15,368	11.5%	117
Football	7,687	5.8%	115
Frisbee	9,104	6.8%	148
Golf	14,149	10.6%	112
Hiking	16,196	12.2%	122
Ice Skating	3,881	2.9%	113
Jogging/Running	25,486	19.1%	150
Pilates	4,255	3.2%	114
Soccer	6,181	4.6%	123
Softball	5,782	4.3%	127
Swimming	23,276	17.5%	110
Tennis	6,374	4.8%	112
Volleyball	5,975	4.5%	127
Walking for Exercise	43,224	32.4%	116
Weight Lifting	20,695	15.5%	146
Yoga	11,553	8.7%	121

2014 Participation: The number of participants per year in the activity (in millions) in the United States.
2005 Participation: The number of participants per year in the activity (in millions) in the United States.
Percent Change: The percent change in the level of participation from 2005 to 2014.

A Market Potential Index (MPI) measure the relative likelihood of the adults or household in the specified trade are to exhibit certain consumer behavior or purchasing patterns compared to the U.S. A MPI of 100 represents the U.S. average. Two common factors that could lead to a MPI of less than 100 would be lack of facilities and inability to pay to participate in programs. The fact that only 1 of the activities identified has a MPI of less than 100 points to an active vibrant community.

[11] These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MPI in a nationally representative survey of U.S. households. ESRI forecasts for 2015 and 2020.

While the information provided by the NSGA and ESRI is robust and takes into account many activities, it is recognized that some activities are omitted. To supplement the information provided by those 2 agencies B*K has used information from SFIA and their most recent Sports Marketing Survey.

Table F – 2008-2013 Growth/Decline in Team Sports

Team Sport	Total % Growth 2008-2013	Average Annual Growth 2008-2013
Rugby	+81.0%	+13.8%
Field Hockey	+31.4%	+5.9%
Volleyball (sand/beach)	+18.5%	+3.6%
Ultimate Frisbee	+13.9%	+2.7%
Track & Field	-11.6%	-2.4%
Roller Hockey	-17.2%	-3.4%

It is important to remember that the information reflected in Table-F are national trends. SFIA does not provide information based upon region of the country or race. Therefore it will be important for the City to balance what they are experiencing on a local level with these national trends.

Non-Sport Participation Statistics: It is recognized *that* the parks and recreation departments are often associated with sports or physical activity. However, it is important to note that inclusion of non-sport activities is important to provide a community a well-rounded experience. Participation in a wide variety of passive activities and cultural pursuits is common and essential to a well-rounded department.

While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States, and it is conducted in partnership with the U.S. Census Bureau. The large number of survey respondents – similar in make-up to the total U.S. adult population – permits a statistical snapshot of American's engagement with the arts by frequency and activity type. The survey has taken place five times since 1982, allowing researchers to compare the trends not only for the total adult population, but also for demographic subgroups.[12]

The participation numbers for these activities are national numbers.

The reason that many parks and recreation departments have gotten in the business of offering these types of enrichment activities is because they are being defunded in schools. As such departments have expanded their role in not only offering opportunities for physical activity but also enrichment. Many departments view their role as ensuring that their residents are exposed to various enrichment opportunities. The price point and revenue potential for these enrichment opportunities are not the same as their physical activity / team sports counterparts. It will be important for the City to determine their place in this market and to what degree they want to be in the business of offering these programs.

[12] National Endowment for the Arts, *Arts Participation 2008 Highlights from a National Survey.*

Table G – Percentage of U.S. Adult Population Attending Arts Performances: 1982-2008

					Rate of Change	
	1982	**1992**	**2002**	**2008**	**2002-2008**	**1982-2008**
Jazz	9.6%	10.6%	10.8%	7.8%	-28%	-19%
Classical Music	13.0%	12.5%	11.6%	9.3%	-20%	-29%
Opera	3.0%	3.3%	3.2%	2.1%	-34%	-30%
Musical Plays	18.6%	17.4%	17.1%	16.7%	-2%	-10%
Non-Musical Plays	11.9%	13.5%	12.3%	9.4%	-24%	-21%
Ballet	4.2%	4.7%	3.9%	2.9%	-26%	-31%

Smaller percentages of adults attended performing arts events than in previous years.

- Opera and jazz participation significantly decreased for the first time, with attendance rates falling below what they were in 1982.
- Classical music attendance continued to decline – at a 29% rate since 1982 – with the steepest drop occurring from 2002 to 2008
- Only musical play saw no statistically significant change in attendance since 2002.

Table H – Percentage of U.S. Adult Population Attending Art Museums, Parks and Festivals: 1982-2008

					Rate of Change	
	1982	**1992**	**2002**	**2008**	**2002-2008**	**1982-2008**
Art Museums/Galleries	22.1%	26.7%	26.5%	22.7%	-14%	+3%
Parks/Historical Buildings	37.0%	34.5%	31.6%	24.9%	-21%	-33%
Craft/Visual Arts Festivals	39.0%	40.7%	33.4%	24.5%	-27%	-37%

Attendance for the most popular types of arts events – such as museums and craft fairs – also declined.

- After topping 26% in 1992 and 2002, the art museum attendance rate slipped to 23 percent in 2008 – comparable to the 1982 level.
- The proportion of the U.S. adults touring parks or historical buildings has diminished by one-third since 1982.

Table I – Median Age of Arts Attendees: 1982-2008

					Rate of Change	
	1982	**1992**	**2002**	**2008**	**2002-2008**	**1982-2008**
U.S. Adults, Average	39	41	43	45	+2	+6
Jazz	29	37	43	46	+4	+17
Classical Music	40	44	47	49	+2	+9
Opera	43	44	47	48	+1	+5
Musicals	39	42	44	45	+1	+6
Non-Musical Plays	39	42	44	47	+3	+8
Ballet	37	40	44	46	+2	+9
Art Museums	36	39	44	43	-1	+7

Long-term trends suggest fundamental shifts in the relationship between age and arts attendance.

- Performing arts attendees are increasingly older than the average U.S. adult.
- Jazz concert-goers are no longer the youngest group of arts participants.
- Since 1982, young adult (18-24 year old) attendance rates have declined significantly for jazz, classical music, ballet, and non-musical plays.
- From 2002 to 2008, however, 45-54 year olds – historically a large component of arts audiences – showed the steepest declines in attendance for most arts events.

Table J – Percentage of U.S. Adult Population Performing or Creating Art: 1992-2008

				Rate of Change	
	1992	**2002**	**2008**	**2002-2008**	**1982-2008**
Performing:					
Jazz	1.7%	1.3%	1.3%	+0.0%	-0.4%
Classical Music	4.2%	1.8%	3.0%	+1.2%	-1.2%
Opera	1.1%	0.7%	0.4%	-0.3%	-0.7%
Choir/Chorus	6.3%	4.8%	5.2%	+0.4%	-1.1%
Musical Plays	3.8%	2.4%	0.9%	-1.5%	-2.9%
Non-Musical Plays	1.6%	1.4%	0.8%	-0.6%	-0.8%
Dance	8.1%	4.3%	2.1%	-2.2%	-6.0%
Making:					
Painting/Drawing	9.6%	8.6%	9.0%	+0.4%	-0.6%
Pottery/Ceramics	8.4%	6.9%	6.0%	-0.9%	-2.4%
Weaving/Sewing	24.8%	16.0%	13.1%	-2.9%	-11.7%
Photography	11.6%	11.5%	14.7%	+3.2%	+3.1%
Creative Writing	7.4%	7.0%	6.9%	-0.1%	-0.5%

Adults generally are creating or performing at lower rates – despite opportunities for displaying their work line.

- Only photography increased from 1992 to 2008 – reflecting, perhaps, greater access through digital media.
- The proportion of U.S. adults doing creative writing has hovered around 7.0 percent.
- The rate of classical music performance slipped from 1992 to 2002 then grew over the next six years.
- The adult participation rate for weaving or sewing was almost twice as great in 1992 as in 2008. Yet this activity remains one of the most popular forms of art creation.

Table K – Percentage of U.S. Adult Population Viewing or Listening to Art Broadcasts or Recordings, 2008 (online media included)

	Percentage	Millions of Adults
Jazz	14.2%	31.9
Classical Music	17.8%	40.0
Latin or Salsa Music	14.9%	33.5
Opera	4.9%	11.0
Musical Plays	7.9%	17.8
Non-Musical Plays	6.8%	15.3
Dance	8.0%	18.0
Programs about the visual arts	15.0%	33.7
Programs about books/writers	15.0%	33.7

As in previous years, more Americans view or listen to broadcasts and recordings of arts events than attend them live.

- The sole exception is live theater, which still attracts more adults than broadcasts or recordings of plays or musicals (online media included).
- Classical music broadcasts or recordings attract the greatest number of adult listeners, followed by Latin or salsa music.
- 33.7 million Americans listened to or watched programs or recordings about books.

General Philosophy: One of the core philosophies of parks and recreation is provide opportunities for all individuals to participate in pursuits of their choice. This leads many organizations to offer a wide variety of opportunities to the community at large. And while parks and recreation is transitioning from an auxiliary service offered by a community to more of an expectation they do not receive the same level of tax support as some departments. This forces parks and recreation departments to operate in a business-like manner and offering programs and services that can be revenue positive. In departments attempting to operate in a business-like manner it cannot be lost that one of the hallmarks of public recreation is the program of drop-in recreation. The ability for citizens to come in to a facility and use it as they choose, outside of an organized programs, is in fact a program itself. It is important that this be maintained as it is a distinguishing characteristic of public recreation in contrast to their private and non-profit counterparts.