

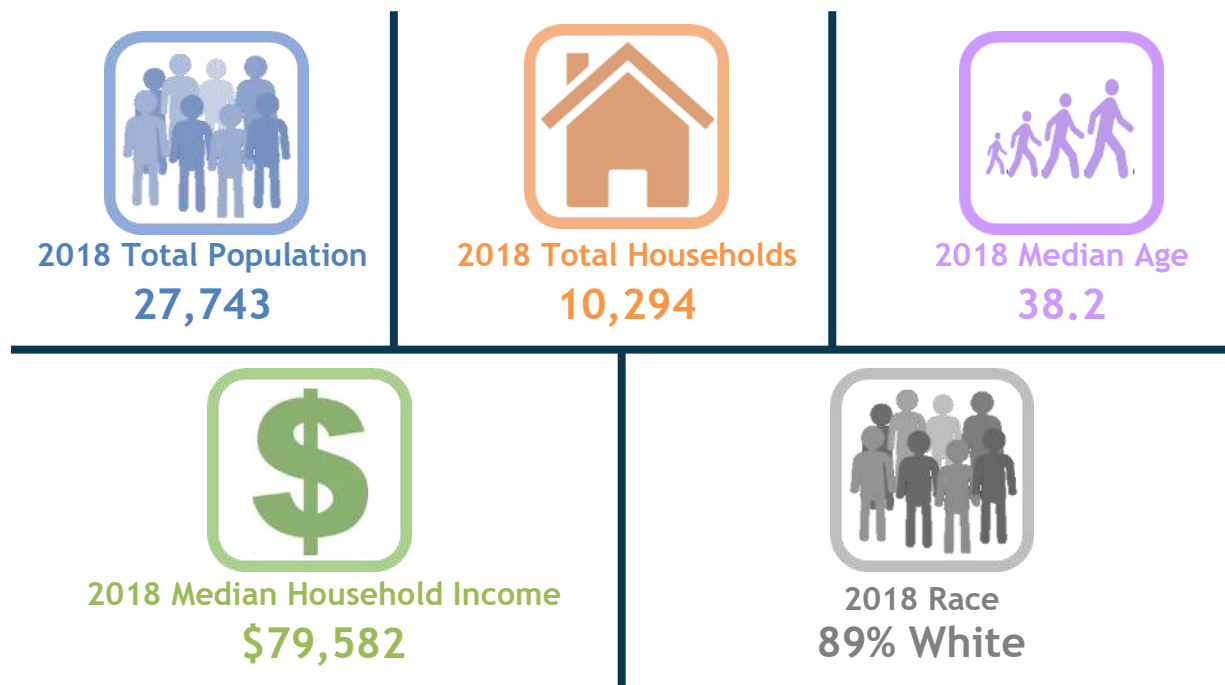
CHAPTER ONE - MARKET ANALYSIS

A key component of the Parks and Recreation Strategic Master Plan is a Market Analysis which helps provide a thorough understanding of the demographic makeup of residents within the Town of Brownsburg, as well as national, regional, and local recreational trends.

1.1 DEMOGRAPHIC ANALYSIS

The Demographic Analysis describes the population within Brownsburg, Indiana. This assessment is reflective of the Town’s total population and its key characteristics such as age segments, income levels, race, and ethnicity. It is important to note that future projections are based on historical patterns and unforeseen circumstances during or after the time of the analysis could have a significant bearing on the validity of the projected figures.

1.1.1 TOWN DEMOGRAPHIC OVERVIEW



1.1.2 METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in August 2018 and reflects actual numbers as reported in the 2010 Census as well as estimates for 2018 and 2023 as obtained by ESRI. Straight line linear regression was utilized for 2028 and 2033 projections. The Town boundaries shown below were utilized for the demographic analysis. (See Figure 1)

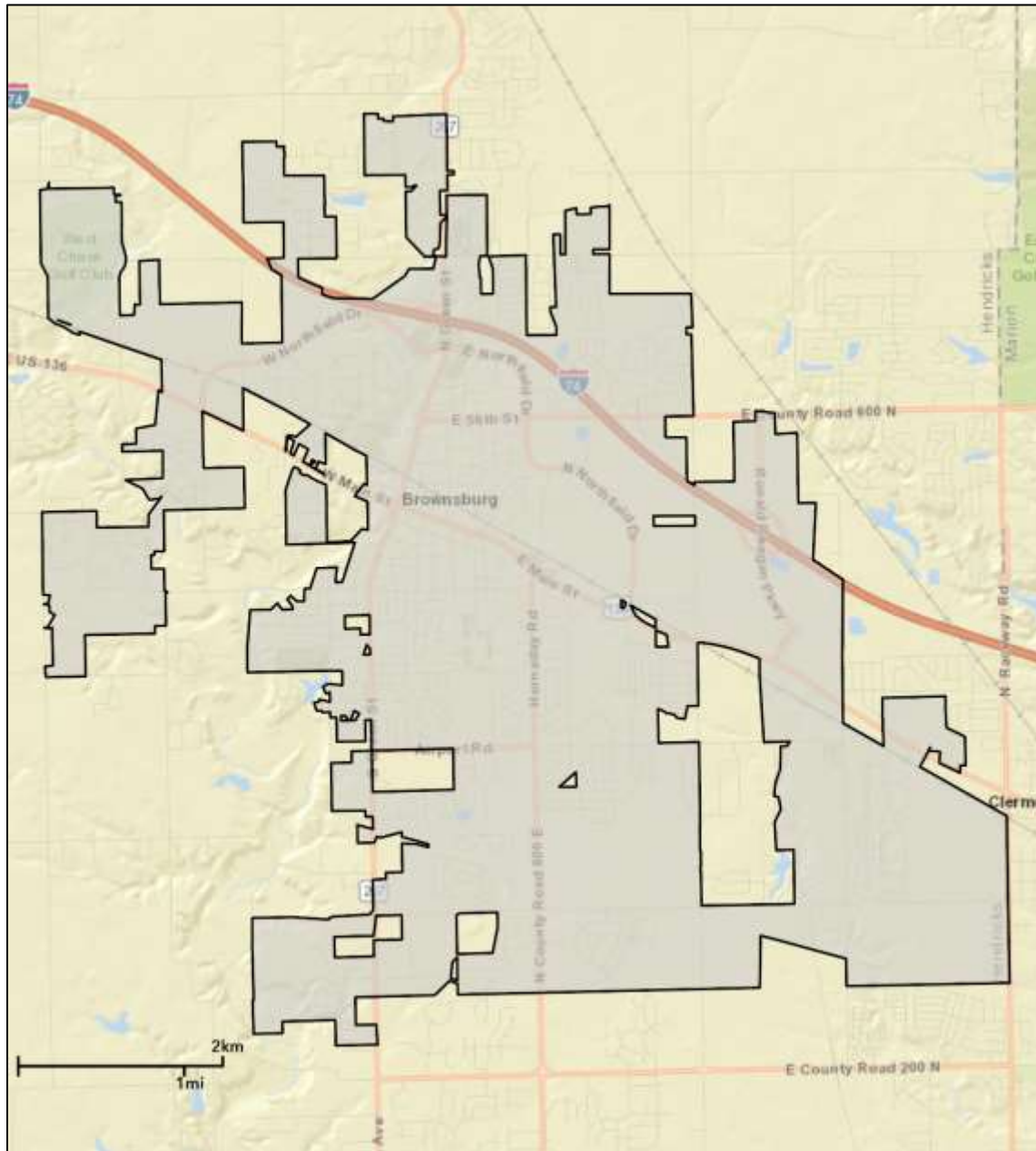


Figure 1: Town of Brownsburg Boundaries

RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; therefore, caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

- American Indian - This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian - This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black - This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander - This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White - This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino - This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

Please Note: The Census Bureau defines Race as a person's self-identification with one or more of the following social groups: White, Black or African American, Asian, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, some other race, or a combination of these. While Ethnicity is defined as whether a person is of Hispanic / Latino origin or not. For this reason, the Hispanic / Latino ethnicity is viewed separate from race throughout this demographic analysis.

1.1.3 TOWN POPULACE

POPULATION

The Town’s population experienced a significant growing trend in recent years, increasing 21.9% from 2010 to 2018 (2.7% per year). This is well above the national annual growth rate of 0.86% (from 2010-2018). Similar to the population, the total number of households also experienced a rapid increase in recent years (20.4% since 2010).

Currently, the population is estimated at 27,743 individuals living within 10,294 households. Projecting ahead, the total population and total number of households are both expected to continue growing over the next 15 years at an above average rate. Based on 2033 predictions, the Town is expected to have 36,975 residents living within 13,586 households. (See Figures 2)

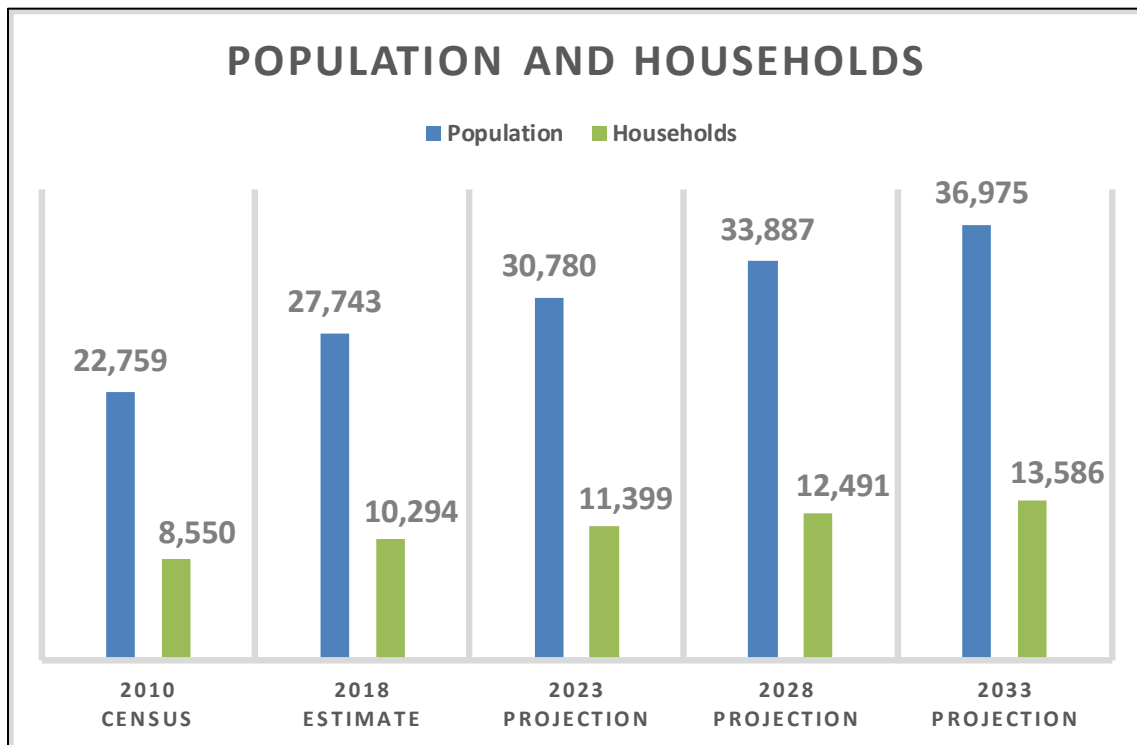


Figure 2: Town’s Total Population

AGE SEGMENT

Evaluating the Town by age segments, Brownsburg exhibits a younger than average population. The Town has a median age of 38.2 years old which is the same as the US median age of 38.2 years. Assessing the population as a whole, the Town is projected to continue its current aging trend. Over the next 15 years, the 55+ population is expected to grow to represent nearly a third of the Town’s total population. This is largely due to the increased life expectancies and the remainder of the Baby Boomer generation shifting into the senior age groups. (See Figure 3).

Due to the continued growth of the older age segments, it is useful to further segment the “Senior” population beyond the traditional 55+ designation. Within the field of parks and recreation, there are two commonly used ways to partition this age segment. One is to simply segment by age: 55-64, 65-74, and 75+. However, as these age segments are engaged in programming, the variability of health and wellness can be a more relevant factor. For example, a 55-year-old may be struggling with rheumatoid arthritis and need different recreational opportunities than a healthy 65-year old who is running marathons once a year. Therefore, it may be more useful to divide this age segment into “Active,” “Low-Impact,” and/or “Social” Seniors.

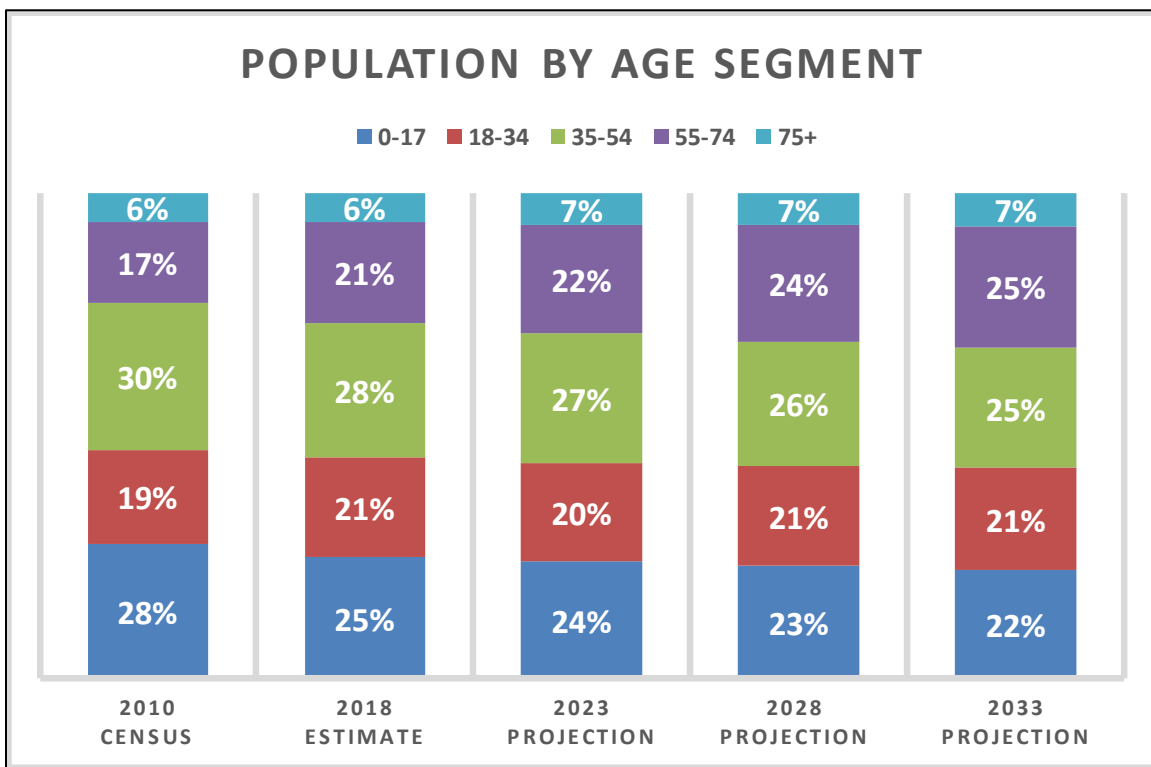


Figure 3: Town’s Population by Age Segments

RACE

Analyzing race, the Town’s current population is predominantly White Alone. The 2018 estimate shows that 89% of the population falls into the White Alone category, while the Black Alone (5%) and Asian (2%) categories represent the largest minorities. The racial diversification of the Town is less diverse than the national population, which is approximately 70% White Alone, 13% Black Alone, and 7% Some Other Race.

The predictions for 2033 expect the Town’s population to continue diversifying, with the White Alone population projected to decrease (-6%) while the Asian and other minority categories experience increases. (Figure 4)

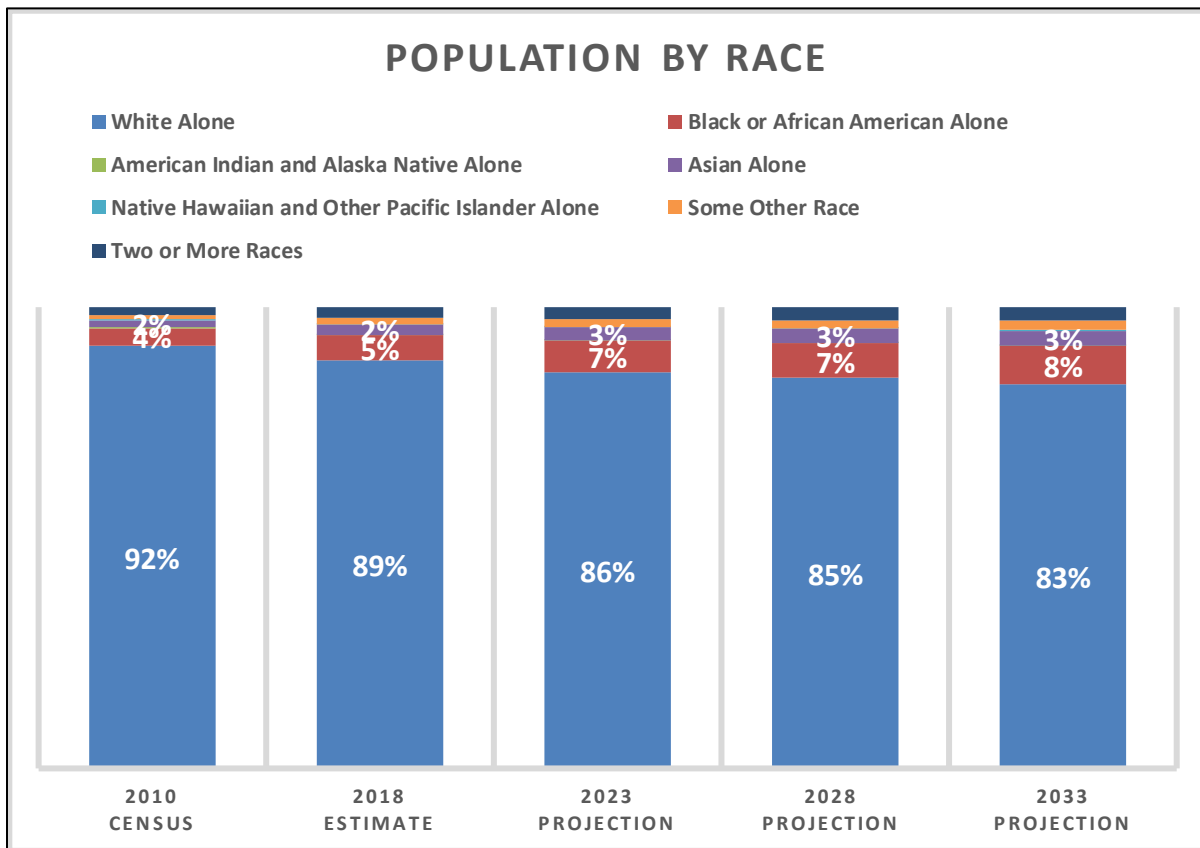


Figure 4: Town’s Population by Race

ETHNICITY

The Town’s population was also assessed based on Hispanic/Latino ethnicity, which by the Census Bureau definition is viewed independently from race. It is important to note that individuals who are Hispanic / Latino in ethnicity can also identify with any of the racial categories from above. Those of Hispanic/Latino origin represent 4% of the Town’s current population, which is significantly lower than the national average (18% Hispanic/Latino). The Hispanic/ Latino population is expected to grow slightly over the next 15 years, increasing to 5% of the Town’s total population by 2033. **(Figure 5)**

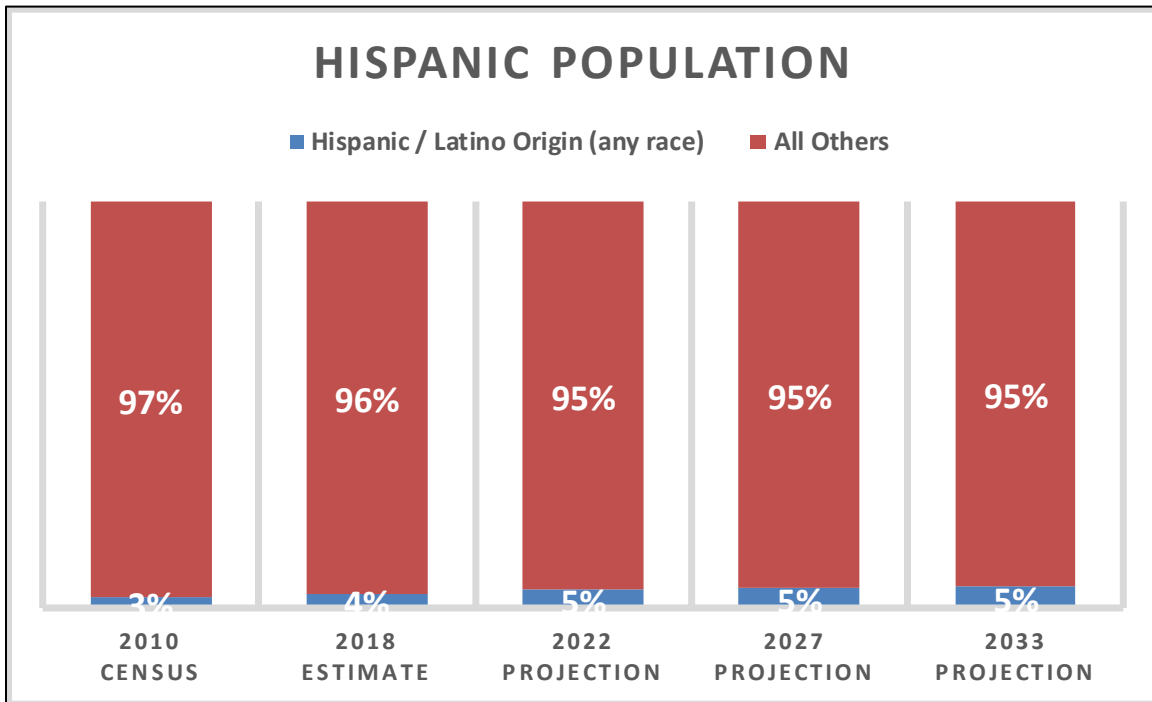


Figure 5: Town’s Population by Ethnicity

HOUSEHOLD INCOME

The Town’s per capita income (\$35,395) and median household income (\$79,582) are both significantly higher than current state (\$27,871 & \$53,531) and national averages (\$31,950 & \$58,100). Additionally, as seen in **Figure 6**, both Brownsburg’s per capita income and median household income are expected to continue growing over the next 15 years reaching \$50,983 and \$112,969 respectively by 2033.

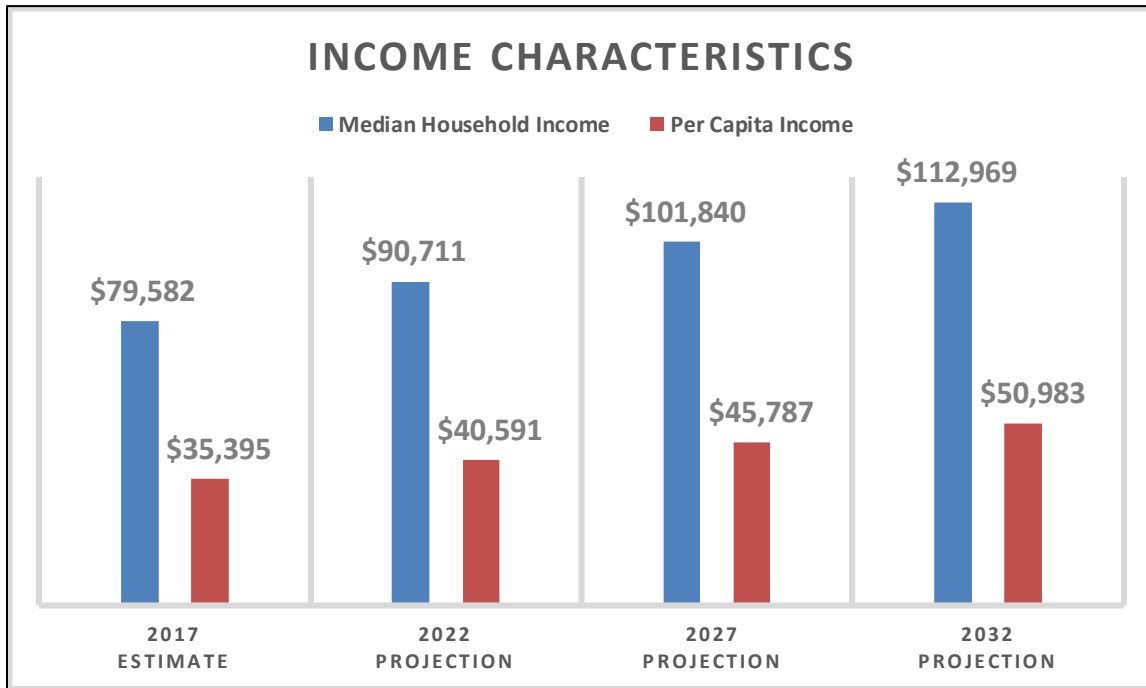


Figure 6: Town’s Income Characteristics

1.1.4 TOWN DEMOGRAPHIC COMPRATIVE SUMMARY

The table below is a summary of Town’s demographic figures. These figures are then compared to the state and U.S. populations. This type of analysis allows Brownsburg to see how their population compares on a local and national scale. The highlighted cells represent key takeaways from the comparison between the Town and the national population.

- = Significantly higher than the National Average
- = Significantly lower than the National Average

2018 Demographic Comparison		Brownsburg	Indiana	U.S.A.
Population	Annual Growth Rate (2010-2018)	2.74%	0.54%	0.86%
	Projected Annual Growth Rate (2018-2033)	2.22%	0.56%	0.88%
Households	Annual Growth Rate (2010-2018)	2.55%	0.53%	0.79%
	Average Household Size	2.66	2.52	2.59
Age Segment Distribution	Ages 0-17	25%	23%	22%
	Ages 18-34	21%	23%	24%
	Ages 35-54	28%	25%	25%
	Ages 55-74	21%	23%	22%
	Ages 75+	6%	6%	7%
Race Distribution	White Alone	88.6%	82.1%	69.9%
	Black Alone	5.4%	9.5%	12.9%
	American Indian	0.2%	0.3%	1.0%
	Asian	2.2%	2.4%	5.7%
	Pacific Islander	0.1%	0.0%	0.2%
	Some other Race	1.4%	3.1%	6.9%
	Two or More Races	2.1%	2.5%	3.4%
Hispanic/Latino Population	Hispanic / Latino Origin (any race)	3.7%	7.1%	18.3%
	All Others	96.3%	92.9%	81.7%
Income Characteristics	Per Capita Income	\$35,395	\$27,871	\$31,950
	Median Household Income	\$79,582	\$53,531	\$58,100

Figure 7 - Town’s Demographic Comparative Table

1.1.5 KEY DEMOGRAPHIC FINDINGS

- The Town's **population annual growth rate** (2.74%) is significantly higher than both Indiana's (0.54%) and the U.S.'s (0.86%) growth rates.
- The Town's **household growth rate** (2.55%) is larger than both state (0.53%) and national (0.79%) averages.
- The Town's **racial distribution** has greater White Alone populations (88.6%) and significantly smaller Black Alone populations (5.4%), when compared to national percentage distribution (69.9% and 12.9%).
- The Town's percentage of **Hispanic/Latino population** (3.7%) is significantly lower than the national average (18.3%).
- The Town's **median house income** (\$79,582) is significantly higher when compared to Indiana's (\$53,531) and the U.S.'s (\$58,100) income characteristics.



1.1.6 MARKET PROFILE

In addition to demographic characteristics, ESRI also provides a Market Profile which analysis key economic factors, including educational attainment, unemployment rate, and percent of population with disabilities.

EDUCATION

Based on the 2018 population, approximately 39% of Brownsburg’s residents (25+ years old) have attained a Bachelor’s or Graduate Degree; which is slightly above the national average (30%). While an estimated 6% of the population never attained a high school diploma.

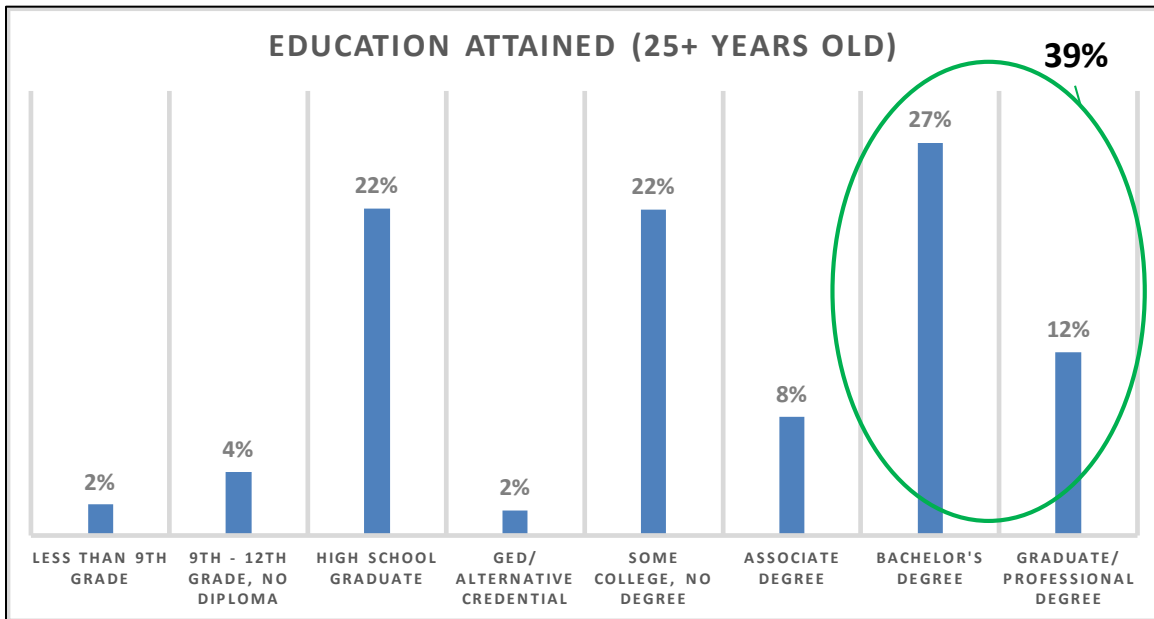


Figure 8: Educational Attainment

UNEMPLOYMENT

In assessing the civilian labor force (16+ years old), currently 97% of residents hold a full or part-time position, while the remaining 3% of the Town’s (civilian) population are deem unemployed.

Note: The unemployment rate excludes individuals who are currently in institutions such as prisons, mental hospitals, or nursing homes.

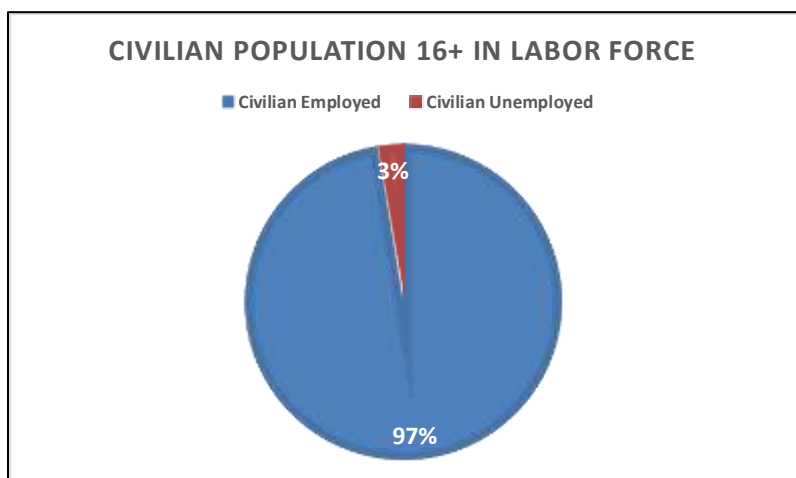


Figure 9: Unemployment Rate

DISABILITY

Based on a four-year trend (2012-2016) the percentage of Brownsburg’s population that has been diagnosed with a disability has slightly increased since 2012. As expected, the 65+ population is at significantly greater risk of being diagnosed with a disability. Approximately 1/4 of all residents over the age of 64 has either a physical or mental disability.

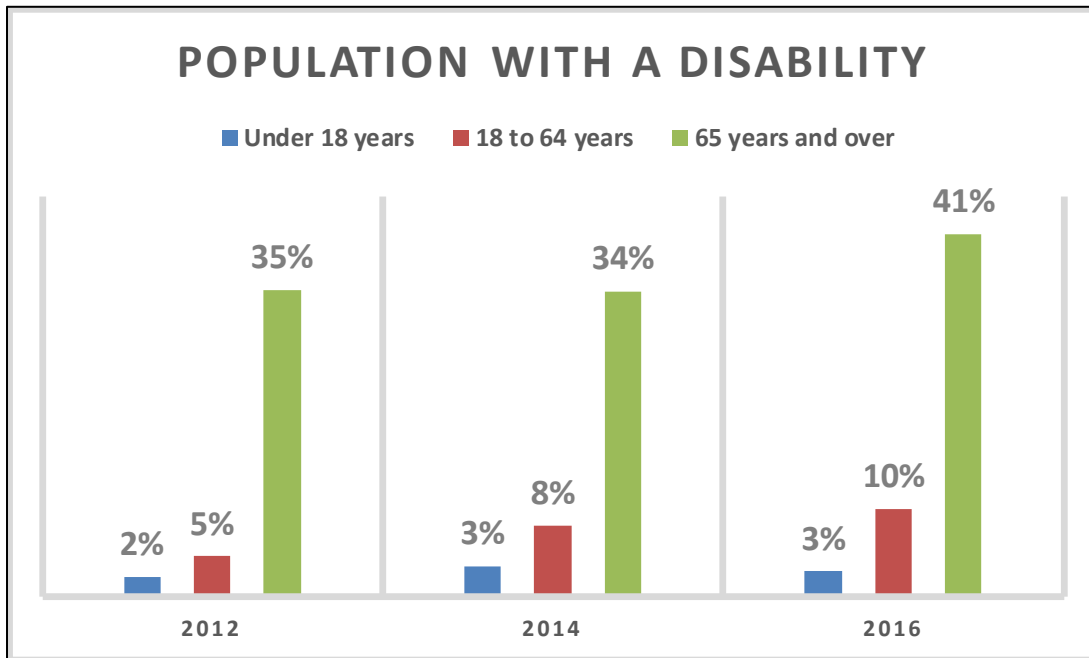


Figure 10 - Percent of Population with a Disability

1.2 RECREATION TRENDS ANALYSIS

The Trends Analysis provides an understanding of national, regional, and local recreational trends. This analysis examines participation trends, activity levels, and programming trends. It is important to note that all trends are based on current and/or historical patterns and participation rates.

1.2.1 NATIONAL TRENDS IN RECREATION

METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Recreational Activities Topline Participation Report 2018* was utilized in evaluating the following trends:

- National Trends in Sport and Fitness Participation
- Core vs. Casual Participation
- Activity by Generation



The study is based on findings from surveys carried out in 2017 and the beginning of 2018 by the Physical Activity Council, resulting in a total of 30,999 online interviews (individual and household surveys). A sample size of 30,999 completed interviews is considered by SFIA to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of +/- 0.27 percentage points at a 95% confidence interval. Using a weighting technique, survey results are applied to the total U.S. population figure of 298,325,103 people (ages six and older). The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S.

CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency. Core participants have higher participatory frequency than casual participants. The thresholds that define casual versus core participation may vary based on the nature of each individual activity. For instance, core participants engage in most fitness and recreational activities more than 50 times per year, while for sports, the threshold for core participation is typically 13 times per year. In a given activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than casual participants. This may also explain why activities with more core participants tend to experience less pattern shifts in participation rates than those with larger groups of casual participants.

In recent years, the percent of core participants has decreased in nearly every sport/activity as casual participation continues to become more common among today's generation. This is expected to be a result of several factors including time restraints, financial barriers, and the introduction of new activities. All of these factors are contributing to participants trying out new activities and casually participating in a wide variety of sports and recreation endeavors versus the former trend of dedicating all of one's time and finance to one (or two) activities.

INACTIVITY RATES / ACTIVITY LEVEL TRENDS

SFIA also categorizes participation rates by intensity, dividing activity levels into five categories based on the caloric implication (i.e., high calorie burning, low/med calorie burning, or inactive) and the frequency of participation (i.e., 1-50 times, 50-150 times, or above) for a given activity. Participation rates are expressed as 'super active' or 'active to a healthy level' (high calorie burning, 151+ times), 'active' (high calorie burning, 50-150 times), 'casual' (high calorie burning, 1-50 times), 'low/med

calorie burning’, and ‘inactive’. These participation rates are then assessed based on the total population trend over the last five years, as well as breaking down these rates by generation.

NATIONAL SPORT AND FITNESS PARTICIPATORY TRENDS

NATIONAL TRENDS IN GENERAL SPORTS

The sports most heavily participated in the United States were Golf (23.8 million in 2016) and Basketball (23.4 million), which have participation figures well in excess of the other activities within the general sports category. The popularity of Golf and Basketball can be attributed to the ability to compete with relatively small number of participants. Even though Golf has experienced a recent decrease in participation, it still continues to benefit from its wide age segment appeal and is considered a life-long sport. Basketball’s success can be attributed to the limited amount of equipment needed to participate and the limited space requirements necessary, which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game.

Since 2012, Rugby and other niche sports, like Boxing, Lacrosse, and Roller Hockey have seen strong growth. Rugby has emerged as the overall fastest growing sport, as it has seen participation levels rise by 82.8% over the last five years. Based on the five-year trend, Boxing for Competition (42.6%), Lacrosse (35.1%), and Roller Hockey (34.2%) have also experienced significant growth. In the most recent year, the fastest growing sports were Boxing for Competition (13.1%) and Pickleball (11.3%).

During the last five years, the sports that are most rapidly declining include Ultimate Frisbee (-39.1%), Touch Football (-22.8%), Tackle Football (-16.0%), and Racquetball (-13.4%). For the most recent year, Ultimate Frisbee (-14.9%), Badminton (-12.6%), Gymnastics (-10.7%), and Volleyball-Sand/Beach (-9.9%) experienced the largest declines.

In general, the most recent year shares a similar pattern with the five-year trends. This suggests that the increasing participation rates in certain activities have yet to peak in sports like Rugby, Lacrosse, Field Hockey, and Competitive Boxing. However, some sports that increased rapidly over the past five years have experienced recent decreases in participation, including Squash, Ice Hockey, Roller Hockey and Volleyball-Sand/Beach. The reversal of the five-year trends in these sports may be due to a relatively low user base (ranging from 1-5 million) and could suggest that participation in these activities may have peaked.

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

The most popular sports, such as Basketball and Baseball, have a larger core participant base (engaged 13+ times annually) than casual participant base (engaged at least 1 time annually). Less mainstream, less organized sports such as Ultimate Frisbee, Roller Hockey, Squash, and Boxing for Competition have larger casual participation. Although these sports increased in participation over the last five years, the newcomers were mostly casual participants that may be more inclined to switch to other sports or fitness activities, resulting in the declining one-year trends.

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Golf * (2011, 2015, and 2016 data)	25,682	24,120	23,815	-7.3%	-1.3%
Basketball	23,708	22,343	23,401	-1.3%	4.7%
Tennis	17,020	18,079	17,683	3.9%	-2.2%
Baseball	12,976	14,760	15,642	20.5%	6.0%
Soccer (Outdoor)	12,944	11,932	11,924	-7.9%	-0.1%
Softball (Slow Pitch)	7,411	7,690	7,283	-1.7%	-5.3%
Football, Flag	5,865	6,173	6,551	11.7%	6.1%
Badminton	7,278	7,354	6,430	-11.7%	-12.6%
Volleyball (Court)	6,384	6,216	6,317	-1.0%	1.6%
Football, Touch	7,295	5,686	5,629	-22.8%	-1.0%
Soccer (Indoor)	4,617	5,117	5,399	16.9%	5.5%
Football, Tackle	6,220	5,481	5,224	-16.0%	-4.7%
Volleyball (Sand/Beach)	4,505	5,489	4,947	9.8%	-9.9%
Gymnastics	5,115	5,381	4,805	-6.1%	-10.7%
Track and Field	4,257	4,116	4,161	-2.3%	1.1%
Cheerleading	3,244	4,029	3,816	17.6%	-5.3%
Racquetball	4,070	3,579	3,526	-13.4%	-1.5%
Pickleball	N/A	2,815	3,132	N/A	11.3%
Ultimate Frisbee	5,131	3,673	3,126	-39.1%	-14.9%
Ice Hockey	2,363	2,697	2,544	7.7%	-5.7%
Softball (Fast Pitch)	2,624	2,467	2,309	-12.0%	-6.4%
Lacrosse	1,607	2,090	2,171	35.1%	3.9%
Wrestling	1,922	1,922	1,896	-1.4%	-1.4%
Roller Hockey	1,367	1,929	1,834	34.2%	-4.9%
Rugby	887	1,550	1,621	82.8%	4.6%
Field Hockey	1,237	1,512	1,596	29.0%	5.6%
Squash	1,290	1,549	1,492	15.7%	-3.7%
Boxing for Competition	959	1,210	1,368	42.6%	13.1%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

*2017 information not available for **Golf**. Information to be released by National Golf Foundation. Participation figures above reflect 2011, 2015, and 2016 data.

Figure 11 - General Sports National Participatory Trends

NATIONAL TRENDS IN GENERAL FITNESS

Overall, national participatory trends in fitness have experienced strong growth in recent years. Many of these activities have become popular due to an increased interest among Americans to improve their health and enhance quality of life by engaging in an active lifestyle. These activities also have very few barriers to entry, which provides a variety of options that are relatively inexpensive to participate in and can be performed by most individuals.

The most popular fitness activity, by far, is Fitness Walking, which had about 110.8 million participants in 2017, increasing 2.7% from the previous year. Other leading fitness activities based on total number of participants include Treadmill (52.9 million), Free Weights (52.2 million), Running/Jogging (50.7 million), Weight/Resistance Machines (36.2 million), and Stationary Cycling (36.0 million).

Over the last five years, the activities growing most rapidly are Non-Traditional / Off-Road Triathlons (74.7%), Trail Running (57.6%), and Aerobics (32.7%). Over the same time frame, the activities that have undergone the most decline include: Boot Camps Style Cross Training (-11.3%), Stretching (-7.5%), and Weight/Resistance Machines (-6.9%).

In the last year, activities with the largest gains in participation were Triathlon Non-Traditional/Off Road (10.1%), Running/Jogging (7.1%), and Trail Running (6.6%). From 2016-2017, the activities that had the most decline in participation were Traditional/Road Triathlon (-8.9%), Cardio Kickboxing (-3.0%), and Calisthenics/Bodyweight Exercise (-2.6%).

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

It should be noted that many of the activities that are rapidly growing have a relatively low user base, which allows for more drastic shifts in terms of percentage, especially for five-year trends. Increasing casual participants may also explain the rapid growth in some activities. For instance, core/casual participation trends showed that over the last five years, casual participants increased drastically in Non-Traditional/ Off Road (119.6%) and Tai Chi (26.9%), while the core participant base of both activities experienced significantly less growth.

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Fitness Walking	114,029	107,895	110,805	-2.8%	2.7%
Treadmill	50,839	51,872	52,966	4.2%	2.1%
Free Weights (Dumbbells/Hand Weights)	N/A	51,513	52,217	N/A	1.4%
Running/Jogging	51,450	47,384	50,770	-1.3%	7.1%
Weight/Resistant Machines	38,999	35,768	36,291	-6.9%	1.5%
Stationary Cycling (Recumbent/Upright)	35,987	36,118	36,035	0.1%	-0.2%
Stretching	35,873	33,771	33,195	-7.5%	-1.7%
Elliptical Motion Trainer*	28,560	32,218	32,283	13.0%	0.2%
Free Weights (Barbells)	26,688	26,473	27,444	2.8%	3.7%
Yoga	23,253	26,268	27,354	17.6%	4.1%
Calisthenics/Bodyweight Exercise	N/A	25,110	24,454	N/A	-2.6%
Choreographed Exercise	N/A	21,839	22,616	N/A	3.6%
Aerobics (High Impact)	16,178	21,390	21,476	32.7%	0.4%
Stair Climbing Machine	12,979	15,079	14,948	15.2%	-0.9%
Cross-Training Style Workout	N/A	12,914	13,622	N/A	5.5%
Stationary Cycling (Group)	8,477	8,937	9,409	11.0%	5.3%
Trail Running	5,806	8,582	9,149	57.6%	6.6%
Pilates Training	8,519	8,893	9,047	6.2%	1.7%
Cardio Kickboxing	6,725	6,899	6,693	-0.5%	-3.0%
Boot Camp Style Cross-Training	7,496	6,583	6,651	-11.3%	1.0%
Martial Arts	5,075	5,745	5,838	15.0%	1.6%
Boxing for Fitness	4,831	5,175	5,157	6.7%	-0.3%
Tai Chi	3,203	3,706	3,787	18.2%	2.2%
Barre	N/A	3,329	3,436	N/A	3.2%
Triathlon (Traditional/Road)	1,789	2,374	2,162	20.8%	-8.9%
Triathlon (Non-Traditional/Off Road)	1,075	1,705	1,878	74.7%	10.1%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

*Cardio Cross Trainer is merged to Elliptical Motion Trainer

Figure 12 - General Fitness National Participatory Trends

NATIONAL TRENDS IN OUTDOOR RECREATION

Results from the SFIA report demonstrate a contrast of growth and decline in participation regarding outdoor / adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or within a group, and are not as limited by time constraints.

In 2017, the most popular activities, in terms of total participants, from the outdoor / adventure recreation category include: Day Hiking (44.9 million), Road Bicycling (38.8 million), Freshwater Fishing (38.3 million), and Camping within ¼ mile of Vehicle/Home (26.2 million).

From 2012-2017, BMX Bicycling (83.4%), Adventure Racing (56.3%), Backpacking Overnight (38.3%), and Day Hiking (30.1%) have undergone the largest increases in participation. Similarly, in the last year, activities growing most rapidly include: BMX Bicycling (10.0%), Backpacking Overnight (8.1%), and Day Hiking (6.6%).

The five-year trend shows activities declining most rapidly were In-Line Roller Skating (-20.7%), Camping within ¼ mile of Home/Vehicle (-16.5%), and Birdwatching (-9.2%). More recently, activities experiencing the largest declines were Adventure Racing (-15.7%), Traditional Climbing (-9.4%), and In-Line Roller Skating (-2.1%).

CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

National participation trends for outdoor activities is on the rise; however, In-Line Roller Skating and Freshwater Fishing only experienced increases in *casual* participation over the last five years. Any decline in participation over the last five years was mainly ascribed to decreases in core participants for activities such as In-Line Roller Skating (-32.6%), Skateboarding (-10.7%), Road Bicycling (-10.4%), Camping Recreational Vehicle (-10.0%), and Archery (-3.2%).

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Hiking (Day)	34,519	42,128	44,900	30.1%	6.6%
Bicycling (Road)	39,790	38,365	38,866	-2.3%	1.3%
Fishing (Freshwater)	39,002	38,121	38,346	-1.7%	0.6%
Camping (< 1/4 Mile of Vehicle/Home)	31,454	26,467	26,262	-16.5%	-0.8%
Camping (Recreational Vehicle)	15,903	15,855	16,159	1.6%	1.9%
Fishing (Saltwater)	12,000	12,266	13,062	8.9%	6.5%
Birdwatching (>1/4 mile of Vehicle/Home)	13,535	11,589	12,296	-9.2%	6.1%
Backpacking Overnight	7,933	10,151	10,975	38.3%	8.1%
Bicycling (Mountain)	7,265	8,615	8,609	18.5%	-0.1%
Archery	7,173	7,903	7,769	8.3%	-1.7%
Fishing (Fly)	5,848	6,456	6,791	16.1%	5.2%
Skateboarding	6,227	6,442	6,382	2.5%	-0.9%
Roller Skating, In-Line	6,647	5,381	5,268	-20.7%	-2.1%
Bicycling (BMX)	1,861	3,104	3,413	83.4%	10.0%
Adventure Racing	1,618	2,999	2,529	56.3%	-15.7%
Climbing (Traditional/Ice/Mountaineering)	2,189	2,790	2,527	15.4%	-9.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 13 - Outdoor Recreation National Participatory Trends

NATIONAL TRENDS IN AQUATIC ACTIVITY

Swimming is unquestionably a lifetime sport, which is most likely why it has experienced such strong participation growth among the American population. In 2017, Fitness Swimming is the absolute leader in overall participation (27.1 million) for aquatic activities, due in large part to its broad, multigenerational appeal. In the most recent year, Fitness Swimming reported the strongest growth (2.0%) among aquatic activities, while Aquatic Exercise and Competitive Swimming experienced decreases in participation.

Aquatic Exercise has had a strong participation base of 10.4 million, however it also has recently experienced a slight decrease in participants (-1.1%). Based on previous trends, this activity could rebound in terms of participation due largely to ongoing research that demonstrates the activity’s great therapeutic benefit coupled with increased life expectancies and a booming senior population. Aquatic Exercise has paved the way as a less stressful form of physical activity, while allowing similar benefits as land-based exercises, such as aerobic fitness, resistance training, flexibility, and balance. Doctors are still recommending Aquatic Exercise for injury rehabilitation, mature patients, and patients with bone or joint problems. Compared to a standard workout, Aquatic Exercise can significantly reduce stress placed on weight-bearing joints, bones, and muscles, while also reducing swelling.

National Participatory Trends - Aquatics					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Swimming (Fitness)	23,216	26,601	27,135	16.9%	2.0%
Aquatic Exercise	9,177	10,575	10,459	14.0%	-1.1%
Swimming (Competition)	2,502	3,369	3,007	20.2%	-10.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 14 - Aquatic National Participatory Trends

CORE VS. CASUAL TRENDS IN AQUATIC ACTIVITY

While all activities have undergone increases in participation over the last five years, most recently, casual participation (1-49 times) is increasing much more rapidly than core participation (50+ times). For the five-year timeframe, casual participants of Competition Swimming increased by 56.2%, Aquatic Exercise by 24.8%, and Fitness Swimming by 21.0%. However, core participants of Competition Swimming decreased by -6.5% and Aquatic Exercise declined by -4.6% (from 2012 to 2017).

NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

The most popular water sports / activities based on total participants in 2017 were Recreational Kayaking (10.5 million), Canoeing (9.2 million), and Snorkeling (8.3 million). It should be noted that water activity participation tends to vary based on regional, seasonal, and environmental factors. A region with more water access and a warmer climate is more likely to have a higher participation rate in water activities than a region that has long winter seasons or limited water access. Therefore, when assessing trends in water sports and activities, it is important to understand that fluctuations may be the result of environmental barriers which can greatly influence water activity participation.

Over the last five years, Stand-Up Paddling (138.9%) was by far the fastest growing water activity, followed by White Water Kayaking (33.1%), Recreational Kayaking (28.7%), and Sea/Tour Kayaking (20.8%). Although the five-year trends show water sport activities are getting more popular, the most recent year shows a different trend. From 2016-2017 Stand-Up Paddling Recreational Kayaking reflect much slower increases in participation (3.3% and 5.2%), while White Water Kayaking (-2.0%), Sea/Tour Kayaking (-5.4%) both show decreases in participation numbers.

From 2012-2017, activities declining most rapidly were Jet Skiing (-22.6%), Water Skiing (-19.4%), and Wakeboarding (-10.8%). In the most recent year, activities experiencing the greatest declines in participation included: Boardsailing/Windsurfing (-9.4%), Canoeing (-8.2%), and Scuba Diving (-7.6%).

National Participatory Trends - Water Sports / Activities					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Kayaking (Recreational)	8,187	10,017	10,533	28.7%	5.2%
Canoeing	9,813	10,046	9,220	-6.0%	-8.2%
Snorkeling	8,664	8,717	8,384	-3.2%	-3.8%
Jet Skiing	6,996	5,783	5,418	-22.6%	-6.3%
Sailing	3,841	4,095	3,974	3.5%	-3.0%
Water Skiing	4,434	3,700	3,572	-19.4%	-3.5%
Rafting	3,756	3,428	3,479	-7.4%	1.5%
Stand-Up Paddling	1,392	3,220	3,325	138.9%	3.3%
Wakeboarding	3,368	2,912	3,005	-10.8%	3.2%
Kayaking (Sea/Touring)	2,446	3,124	2,955	20.8%	-5.4%
Scuba Diving	2,781	3,111	2,874	3.3%	-7.6%
Surfing	2,545	2,793	2,680	5.3%	-4.0%
Kayaking (White Water)	1,878	2,552	2,500	33.1%	-2.0%
Boardsailing/Windsurfing	1,372	1,737	1,573	14.7%	-9.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 15 - Water Sports/Activities National Participatory Trends

CORE VS. CASUAL TRENDS IN WATER SPORTS / ACTIVITIES

As mentioned previously, regional, seasonal, and environmental limiting factors may influence the participation rate of water sport and activities. These factors may also explain why all water-based activities have more casual participants than core participants, since frequencies of activities may be constrained by uncontrollable factors.

ACTIVITY BY GENERATION

Analyzing participation by age for recreational activities reveals that fitness and outdoor sports were the most common activities across all generations. Breaking down activity level by generation shows a converse correlation between age and healthy activity rates.

Generation Z (born 2000+) were the most active, with only 17.6% identifying as inactive. Approximately 65% of individuals within this generation were active in 2017; with 26.3% being active to a healthy level, 18.5% being active & high calorie, and 20.1% being casual active & low/med calorie.

Almost half (46.7%) of **millennials (born 1980-1999)** were active to a healthy level (35.4%) or active & high calorie (11.3%), while 24.0% claimed they were inactive. Even though this inactive rate is much higher than Generation Z's (17.6%), it is still below the national inactive rate (28%).

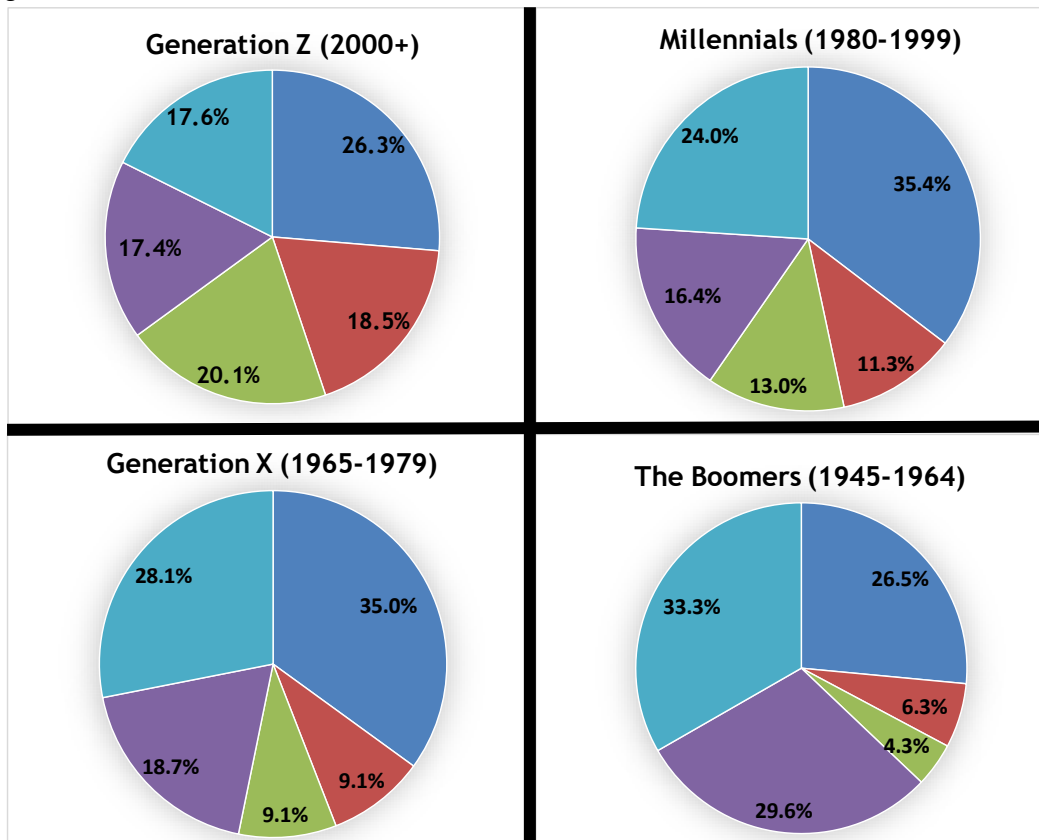
Generation X (born 1965-1979) has the second highest active to a healthy level rate (35.0%) among all generations, only being 0.4% less than Millennials. At the same time, they also have the second highest inactive rate, with 28.1% not active at all.

The Boomers (born 1945-1964) were the least active generation, with an inactive rate of 33.3%. This age group tends to participate in less intensive activities. Approximately 34% claimed to engage in casual & low/med calorie (4.3%) or low/med calorie (29.6%) burning activities.

2017 PARTICIPATION RATES BY GENERATION

US population, Ages 6+

- Active to a Healthy Level
- Active & High Calorie
- Casual & Low/Med Calorie
- Low/Med Calorie
- Inactive



*Times per year: Casual (1-50), Active (51-150), Active to Healthy Level (151+)

NATIONAL AND REGIONAL PROGRAMMING TRENDS

PROGRAMS OFFERED BY PARK AND RECREATION AGENCIES (GREAT LAKES REGION)

NRPA’s *Agency Performance Review 2018* summarize key findings from NRPA Park Metrics, which is a benchmark tool that compares the management and planning of operating resources and capital facilities of park and recreation agencies. The report contains data from 1,069 park and recreation agencies across the U.S. as reported between 2015 and 2017.



The report shows that the typical agencies (i.e., those at the median values) offer 161 programs annually, with roughly 60% of those programs being fee-based activities/events.

According to the information reported to the NRPA, the top five programming activities most frequently offered by park and recreation agencies, both in the U.S. and regionally, are described in the table below (Figure 17). A complete comparison of regional and national programs offered by agencies can be found in Figure 18.

When comparing Great Lakes agencies to the U.S. average, team sports, themed special events, fitness enhancement classes, and health and wellness education were all identified as top five most commonly provided program areas offered regionally and nationally.

Top 5 Most Offered Core Program Areas (Offered by Parks and Recreation Agencies)	
U.S. (% of agencies offering)	Great Lakes Region (% of agencies offering)
<ul style="list-style-type: none"> • Team sports (86%) 	<ul style="list-style-type: none"> • Themed special events (84%)
<ul style="list-style-type: none"> • Themed special events (84%) 	<ul style="list-style-type: none"> • Team sports (81%)
<ul style="list-style-type: none"> • Social recreation events (81%) 	<ul style="list-style-type: none"> • Social recreation events (81%)
<ul style="list-style-type: none"> • Fitness enhancement classes (78%) 	<ul style="list-style-type: none"> • Health and wellness education (78%)
<ul style="list-style-type: none"> • Health and wellness education (78%) 	<ul style="list-style-type: none"> • Fitness enhancement classes 76%

Figure 17 - Top Five Core Program Areas

In general, Great Lakes park and recreation agencies offered programs at a very similar rate as the national average. However, based on a discrepancy threshold of 5% or more, Great Lakes agencies are offering natural and cultural history activities at a higher rate than the national average. Contradictory, the Great Lakes Region is trailing the national average in regards to team sports.

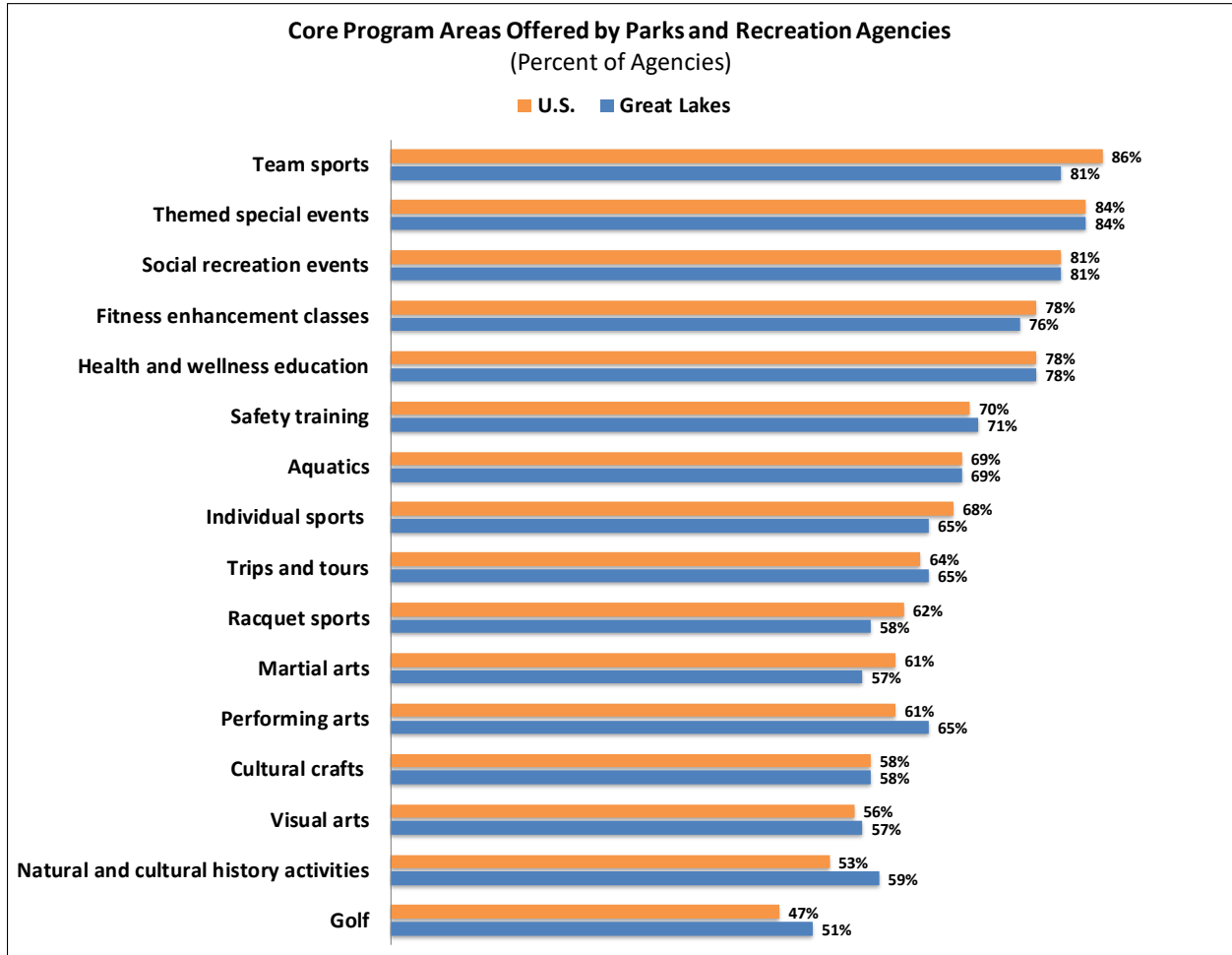


Figure 18 - Programs Offered by Parks and Recreation Agencies

TARGETED PROGRAMS FOR CHILDREN, SENIORS, AND PEOPLE WITH DISABILITIES

For better understanding of targeted programs by age segment, the NRPA also tracks program offerings that cater specifically to children, seniors, and people with disabilities, on a national and regional basis. This allows for further analysis of these commonly targeted populations. According to the 2018 NRPA Agency Performance Review, approximately 79% of agencies offer dedicated senior programming, while 62% of park and recreation agencies provide adaptive programming for individuals with disabilities.

Based on information reported to the NRPA, the top three activities that target children, seniors, and/or people with disabilities most frequently offered by park and recreation agencies are described in the table below (Figure 19). A complete comparison of regional and national programs offered by agencies can be found in Figure 20.

Top 3 Most Offered Core Program Areas (Targeting Children, Seniors, and/or People with Disabilities)	
U.S. (% of agencies offering)	Great Lakes Region (% of agencies offering)
<ul style="list-style-type: none"> • Summer camp (84%) 	<ul style="list-style-type: none"> • Summer camp (84%)
<ul style="list-style-type: none"> • Senior programs (79%) 	<ul style="list-style-type: none"> • Senior programs 79%)
<ul style="list-style-type: none"> • Teen programs (63%) 	<ul style="list-style-type: none"> • Teen programs (63%)

Figure 19 - Top Three Most Offered Core Program Areas

Agencies in the Great Lakes tend to offer targeted programs at an almost identical rate as the national average. The only significant discrepancy is when it comes to preschool and before school program, which the Great Lakes Region offers at a higher rate than the national average.

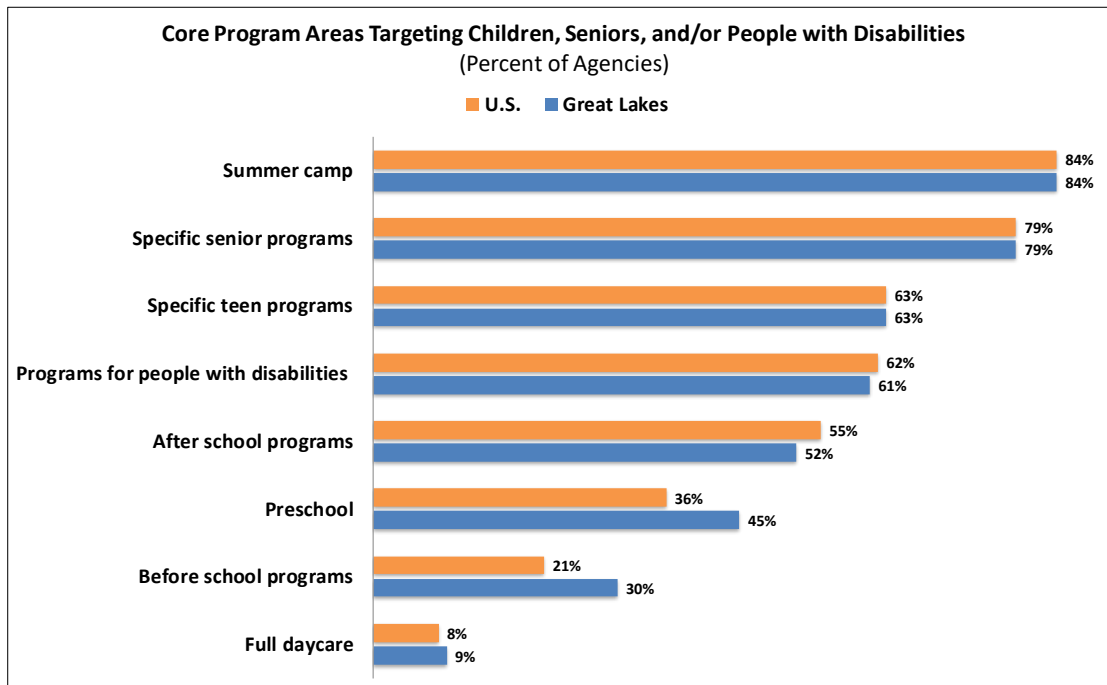


Figure 20 - Targeted Programs for Children, Seniors and/or People with Disabilities

1.3 LOCAL SPORT AND LEISURE MARKET POTENTIAL

1.3.1 MARKET POTENTIAL INDEX (MPI)

The following charts show sport and leisure market potential data for the Town’s service area, as provided by ESRI. A Market Potential Index (MPI) measures the probable demand for a product or service within the Town. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the U.S. national average. The national average is 100; therefore, numbers below 100 would represent lower than average participation rates, and numbers above 100 would represent higher than average participation rates. The Town is compared to the national average in four (4) categories - general sports, fitness, outdoor activity, and commercial recreation.

Overall, the Town demonstrates extremely high market potential index (MPI) numbers. When analyzing the general sports, fitness, and commercial recreation market potential charts, a significant number of activities within these categories have MPI scores above the national average (100). For example, in assessing the fitness activity market potential chart, a majority of activities also have above average scores with only Zumba and Aerobics below the national average.

These overall high MPI scores show that Brownsburg residents are very active and have a rather strong participation presence when it comes to recreational activities. This becomes significant when the Town considers starting up new programs or building new facilities, giving them a strong tool to estimate resident attendance and participation.

As seen in the charts below, the following sport and leisure trends are most prevalent for residents within the Town. The activities are listed in descending order, from highest to lowest MPI score. High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents within the service area will actively participate in offerings provided by Brownsburg Parks & Recreation Department.

GENERAL SPORTS MARKET POTENTIAL

When analyzing the general sports MPI chart, Golf (127 MPI), Softball (114 MPI), and Volleyball (111 MPI) are the most popular sports amongst Town residents when compared to the national average.

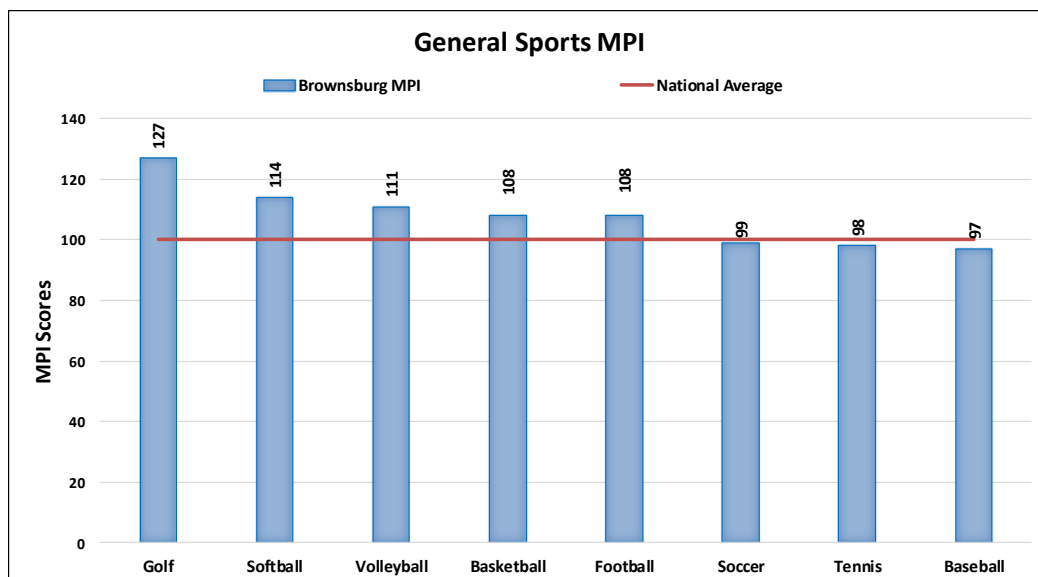


Figure 21 - General Sports MPI

FITNESS MARKET POTENTIAL

The fitness MPI chart shows Swimming (120 MPI), Jogging/Running (114 MPI), and Walking for Exercise (112 MPI) as the most popular activities amongst Brownsburg residents when compared to the national average.

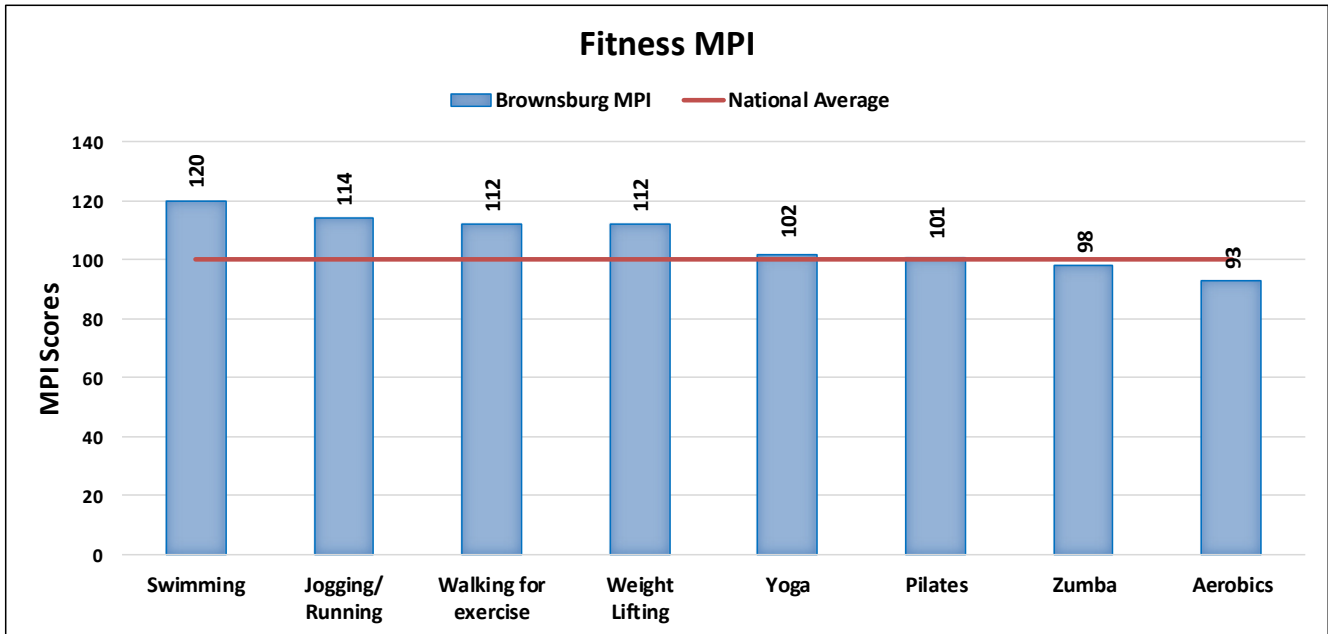


Figure 22 - Fitness MPI

OUTDOOR ACTIVITY MARKET POTENTIAL

When analyzing the outdoor activity MPI chart, Fresh Water Fishing (120 MPI), Power Boating (113 MPI), and Road Bicycling (112 MPI) are the most popular activities amongst Town residents when compared to the national average.

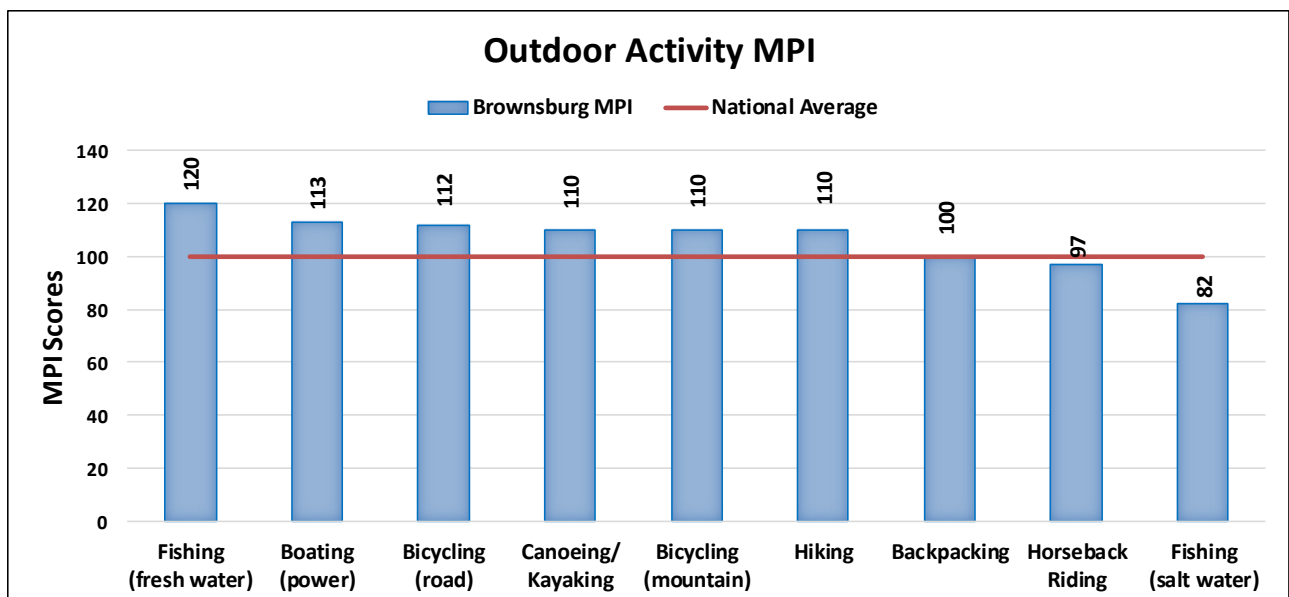


Figure 23 - Outdoor Activity MPI

COMMERCIAL RECREATION MARKET POTENTIAL

The commercial recreation MPI chart shows Visited a zoo in the last 12 months (132 MPI), Spent \$250+ on sports/rec equipment (127 MPI), and Visited theme park 5+ times in last 12 months (127 MPI) as the most popular activities amongst Brownsburg residents when compared to the national average.

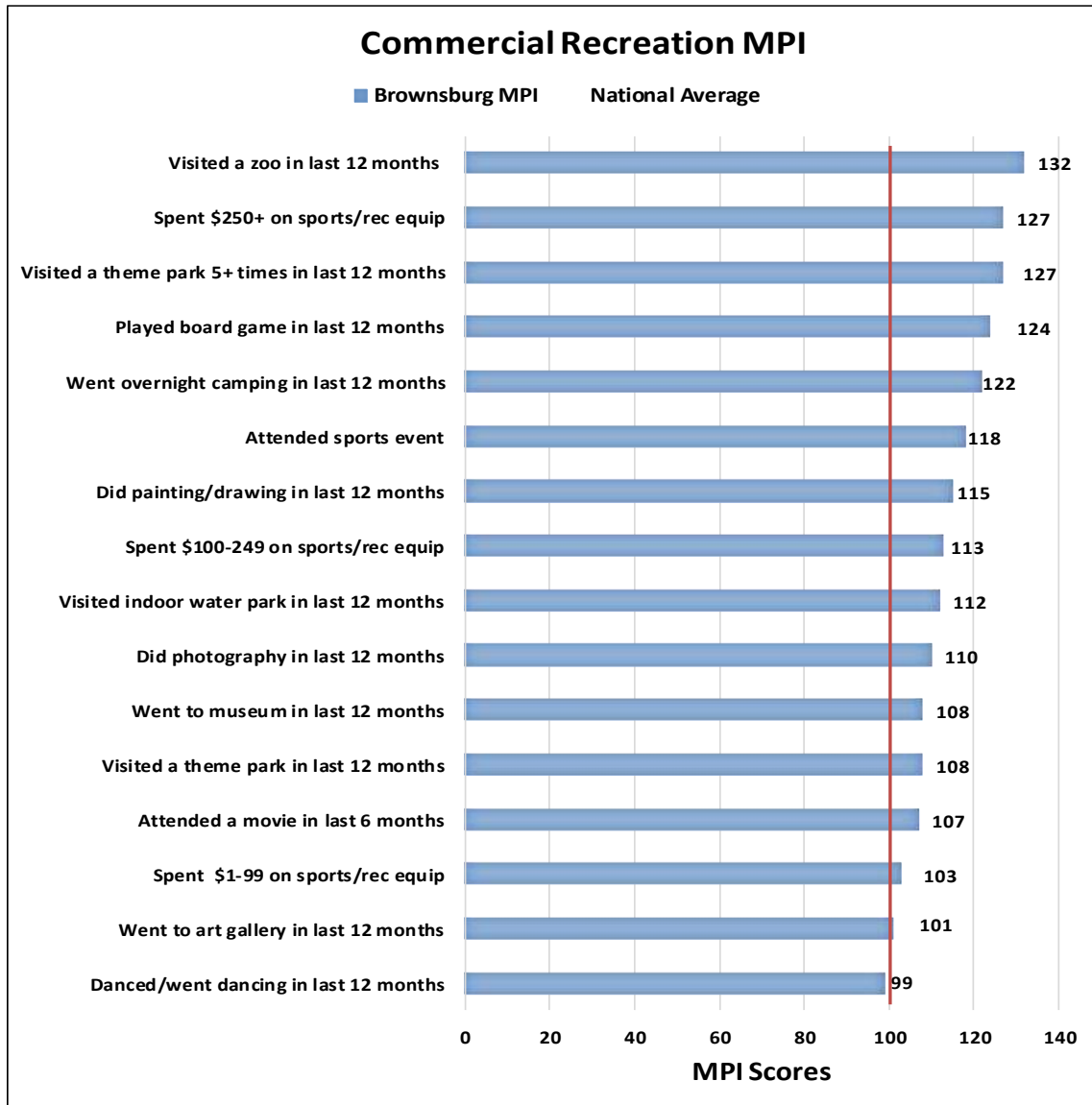


Figure 24 - Commercial Recreation MPI

EXPECTED LOCAL PARTICIPATION

The following charts show the expected percentage of resident participants for the Town in regards to recreational activities. These percentages are correlated to MPI scores previously introduced, and this serves as another tool for programmatic decision-making that allows the Brownsburg Parks & Recreation Department to quantify the expected participants by activity.

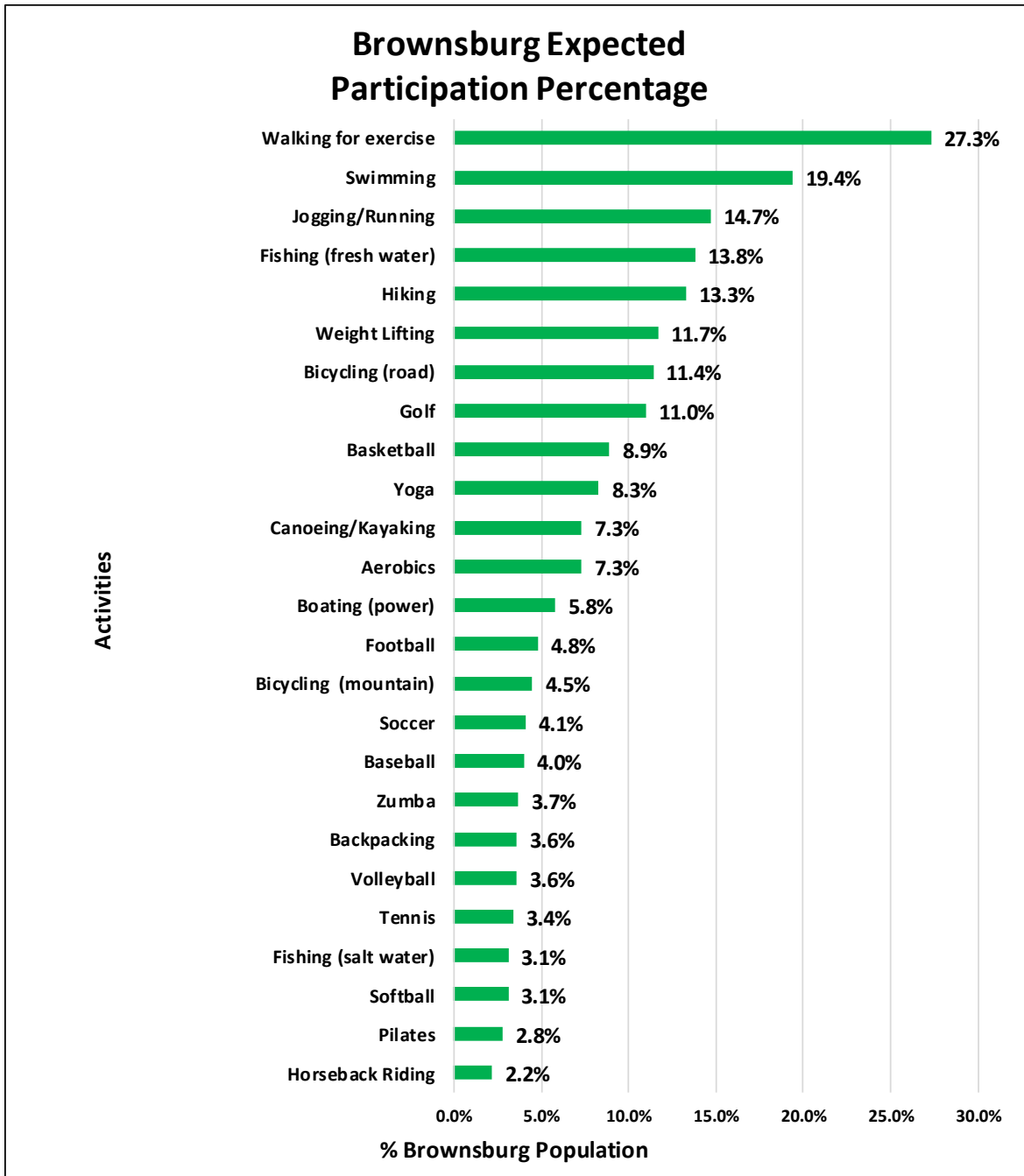


Figure 25 - Expected Brownsburg Participation

APPENDIX A- CORE VS. CASUAL PARTICIPATION TRENDS

GENERAL SPORTS

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Golf * (2011, 2015 and 2016 data)	25,682	100%	24,120	100%	23,815	100%	-7.3%	-1.3%
Basketball	23,708	100%	22,343	100%	23,401	100%	-1.3%	4.7%
<i>Casual (1-12 times)</i>	7,389	31%	7,486	34%	8,546	37%	15.7%	14.2%
<i>Core(13+ times)</i>	16,319	69%	14,857	66%	14,856	63%	-9.0%	0.0%
Tennis	17,020	100%	18,079	100%	17,683	100%	3.9%	-2.2%
Baseball	12,976	100%	14,760	100%	15,642	100%	20.5%	6.0%
<i>Casual (1-12 times)</i>	3,931	30%	5,673	38%	6,405	41%	62.9%	12.9%
<i>Core (13+ times)</i>	9,046	70%	9,087	62%	9,238	59%	2.1%	1.7%
Soccer (Outdoor)	12,944	100%	11,932	100%	11,924	100%	-7.9%	-0.1%
<i>Casual (1-25 times)</i>	6,740	52%	6,342	53%	6,665	56%	-1.1%	5.1%
<i>Core (26+ times)</i>	6,205	48%	5,590	47%	5,259	44%	-15.2%	-5.9%
Softball (Slow Pitch)	7,411	100%	7,690	100%	7,283	100%	-1.7%	-5.3%
<i>Casual (1-12 times)</i>	2,825	38%	3,377	44%	3,060	42%	8.3%	-9.4%
<i>Core(13+ times)</i>	4,586	62%	4,314	56%	4,223	58%	-7.9%	-2.1%
Badminton	7,278	100%	7,354	100%	6,430	100%	-11.7%	-12.6%
<i>Casual (1-12 times)</i>	5,092	70%	5,285	72%	4,564	71%	-10.4%	-13.6%
<i>Core(13+ times)</i>	2,185	30%	2,069	28%	1,867	29%	-14.6%	-9.8%
Volleyball (Court)	6,384	100%	6,216	100%	6,317	100%	-1.0%	1.6%
<i>Casual (1-12 times)</i>	2,553	40%	2,852	46%	2,939	47%	15.1%	3.1%
<i>Core(13+ times)</i>	3,831	60%	3,364	54%	3,378	53%	-11.8%	0.4%
Football, Flag	5,865	100%	6,173	100%	6,551	100%	11.7%	6.1%
<i>Casual (1-12 times)</i>	2,963	51%	3,249	53%	3,572	55%	20.6%	9.9%
<i>Core(13+ times)</i>	2,902	49%	2,924	47%	2,979	45%	2.7%	1.9%
Football, Touch	7,295	100%	5,686	100%	5,629	100%	-22.8%	-1.0%
<i>Casual (1-12 times)</i>	4,015	55%	3,304	58%	3,332	59%	-17.0%	0.8%
<i>Core(13+ times)</i>	3,280	45%	2,386	42%	2,297	41%	-30.0%	-3.7%
Volleyball (Sand/Beach)	4,505	100%	5,489	100%	4,947	100%	9.8%	-9.9%
<i>Casual (1-12 times)</i>	3,040	67%	3,989	73%	3,544	72%	16.6%	-11.2%
<i>Core(13+ times)</i>	1,465	33%	1,500	27%	1,403	28%	-4.2%	-6.5%
Football, Tackle	6,220	100%	5,481	100%	5,224	100%	-16.0%	-4.7%
<i>Casual (1-25 times)</i>	2,566	41%	2,242	41%	2,145	41%	-16.4%	-4.3%
<i>Core(26+ times)</i>	3,655	59%	3,240	59%	3,078	59%	-15.8%	-5.0%
Gymnastics	5,115	100%	5,381	100%	4,805	100%	-6.1%	-10.7%
<i>Casual (1-49 times)</i>	3,252	64%	3,580	67%	3,139	65%	-3.5%	-12.3%
<i>Core(50+ times)</i>	1,863	36%	1,800	33%	1,666	35%	-10.6%	-7.4%
Soccer (Indoor)	4,617	100%	5,117	100%	5,399	100%	16.9%	5.5%
<i>Casual (1-12 times)</i>	2,006	43%	2,347	46%	2,657	49%	32.5%	13.2%
<i>Core(13+ times)</i>	2,611	57%	2,770	54%	2,742	51%	5.0%	-1.0%
Track and Field	4,257	100%	4,116	100%	4,161	100%	-2.3%	1.1%
<i>Casual (1-25 times)</i>	1,820	43%	1,961	48%	2,040	49%	12.1%	4.0%
<i>Core(26+ times)</i>	2,437	57%	2,155	52%	2,121	51%	-13.0%	-1.6%
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

*Golf participation figures are from 2015

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Cheerleading	3,244	100%	4,029	100%	3,816	100%	17.6%	-5.3%
<i>Casual (1-25 times)</i>	1,514	47%	2,365	59%	2,164	57%	42.9%	-8.5%
<i>Core(26+ times)</i>	1,730	53%	1,664	41%	1,653	43%	-4.5%	-0.7%
Ultimate Frisbee	5,131	100%	3,673	100%	3,126	100%	-39.1%	-14.9%
<i>Casual (1-12 times)</i>	3,647	71%	2,746	75%	2,270	73%	-37.8%	-17.3%
<i>Core(13+ times)</i>	1,484	29%	927	25%	856	27%	-42.3%	-7.7%
Racquetball	4,070	100%	3,579	100%	3,526	100%	-13.4%	-1.5%
<i>Casual (1-12 times)</i>	2,572	63%	2,488	70%	2,451	70%	-4.7%	-1.5%
<i>Core(13+ times)</i>	1,498	37%	1,092	30%	1,075	30%	-28.2%	-1.6%
Pickleball	N/A	N/A	2,815	100%	3,132	100%	N/A	11.3%
Ice Hockey	2,363	100%	2,697	100%	2,544	100%	7.7%	-5.7%
<i>Casual (1-12 times)</i>	1,082	46%	1,353	50%	1,227	48%	13.4%	-9.3%
<i>Core(13+ times)</i>	1,281	54%	1,344	50%	1,317	52%	2.8%	-2.0%
Softball (Fast Pitch)	2,624	100%	2,467	100%	2,309	100%	-12.0%	-6.4%
<i>Casual (1-25 times)</i>	1,245	47%	1,198	49%	1,077	47%	-13.5%	-10.1%
<i>Core(26+ times)</i>	1,379	53%	1,269	51%	1,232	53%	-10.7%	-2.9%
Lacrosse	1,607	100%	2,090	100%	2,171	100%	35.1%	3.9%
<i>Casual (1-12 times)</i>	788	49%	1,153	55%	1,142	53%	44.9%	-1.0%
<i>Core(13+ times)</i>	819	51%	938	45%	1,030	47%	25.8%	9.8%
Roller Hockey	1,367	100%	1,929	100%	1,834	100%	34.2%	-4.9%
<i>Casual (1-12 times)</i>	875	64%	1,438	75%	1,419	77%	62.2%	-1.3%
<i>Core(13+ times)</i>	493	36%	491	25%	415	23%	-15.8%	-15.5%
Wrestling	1,922	100%	1,922	100%	1,896	100%	-1.4%	-1.4%
<i>Casual (1-25 times)</i>	965	50%	1,139	59%	1,179	62%	22.2%	3.5%
<i>Core(26+ times)</i>	957	50%	782	41%	717	38%	-25.1%	-8.3%
Rugby	887	100%	1,550	100%	1,621	100%	82.8%	4.6%
<i>Casual (1-7 times)</i>	526	59%	1,090	70%	1,097	68%	108.6%	0.6%
<i>Core(8+ times)</i>	361	41%	460	30%	524	32%	45.2%	13.9%
Squash	1,290	100%	1,549	100%	1,492	100%	15.7%	-3.7%
<i>Casual (1-7 times)</i>	928	72%	1,111	72%	1,044	70%	12.5%	-6.0%
<i>Core(8+ times)</i>	361	28%	437	28%	447	30%	23.8%	2.3%
Field Hockey	1,237	100%	1,512	100%	1,596	100%	29.0%	5.6%
<i>Casual (1-7 times)</i>	578	47%	773	51%	897	56%	55.2%	16.0%
<i>Core(8+ times)</i>	659	53%	739	49%	700	44%	6.2%	-5.3%
Boxing for Competition	959	100%	1,210	100%	1,368	100%	42.6%	13.1%
<i>Casual (1-12 times)</i>	769	80%	1,035	86%	1,168	85%	51.9%	12.9%
<i>Core(13+ times)</i>	190	20%	176	14%	199	15%	4.7%	13.1%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Participation Growth/Decline	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

GENERAL FITNESS

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Fitness Walking	114,029	100%	107,895	100%	110,805	100%	-2.8%	2.7%
<i>Casual (1-49 times)</i>	35,267	31%	34,535	32%	35,326	32%	0.2%	2.3%
<i>Core(50+ times)</i>	78,762	69%	73,359	68%	75,479	68%	-4.2%	2.9%
Treadmill	50,839	100%	51,872	100%	52,966	100%	4.2%	2.1%
<i>Casual (1-49 times)</i>	22,248	44%	23,490	45%	24,444	46%	9.9%	4.1%
<i>Core(50+ times)</i>	28,591	56%	28,381	55%	28,523	54%	-0.2%	0.5%
Free Weights (Dumbbells/Hand Weights)	N/A	100%	51,513	100%	52,217	100%	N/A	1.4%
<i>Casual (1-49 times)</i>	N/A		18,245	35%	18,866	36%	N/A	3.4%
<i>Core(50+ times)</i>	N/A		33,268	65%	33,351	64%	N/A	0.2%
Running/Jogging	51,450	100%	47,384	100%	50,770	100%	-1.3%	7.1%
<i>Casual (1-49 times)</i>	21,973	43%	21,764	46%	24,004	47%	9.2%	10.3%
<i>Core(50+ times)</i>	29,478	57%	25,621	54%	26,766	53%	-9.2%	4.5%
Stationary Cycling (Recumbent/Upright)	35,987	100%	36,118	100%	36,035	100%	0.1%	-0.2%
<i>Casual (1-49 times)</i>	18,265	51%	18,240	51%	18,447	51%	1.0%	1.1%
<i>Core(50+ times)</i>	17,722	49%	17,878	49%	17,588	49%	-0.8%	-1.6%
Weight/Resistant Machines	38,999	100%	35,768	100%	36,291	100%	-6.9%	1.5%
<i>Casual (1-49 times)</i>	15,383	39%	14,346	40%	14,496	40%	-5.8%	1.0%
<i>Core(50+ times)</i>	23,617	61%	21,422	60%	21,795	60%	-7.7%	1.7%
Stretching	35,873	100%	33,771	100%	33,195	100%	-7.5%	-1.7%
<i>Casual (1-49 times)</i>	8,996	25%	9,793	29%	10,095	30%	12.2%	3.1%
<i>Core(50+ times)</i>	26,877	75%	23,978	71%	23,100	70%	-14.1%	-3.7%
Elliptical Motion Trainer*	28,560	100%	32,218	100%	32,283	100%	13.0%	0.2%
<i>Casual (1-49 times)</i>	13,638	48%	15,687	49%	15,854	49%	16.2%	1.1%
<i>Core(50+ times)</i>	14,922	52%	16,532	51%	16,430	51%	10.1%	-0.6%
Free Weights (Barbells)	26,688	100%	26,473	100%	27,444	100%	2.8%	3.7%
<i>Casual (1-49 times)</i>	9,435	35%	10,344	39%	10,868	40%	15.2%	5.1%
<i>Core(50+ times)</i>	17,253	65%	16,129	61%	16,576	60%	-3.9%	2.8%
Yoga	23,253	100%	26,268	100%	27,354	100%	17.6%	4.1%
<i>Casual (1-49 times)</i>	13,305	57%	15,486	59%	16,454	60%	23.7%	6.3%
<i>Core(50+ times)</i>	9,949	43%	10,782	41%	10,900	40%	9.6%	1.1%
Calisthenics/Bodyweight Exercise	N/A	100%	25,110	100%	24,454	100%	N/A	-2.6%
<i>Casual (1-49 times)</i>	N/A	0	9,763	39%	10,095	41%	N/A	3.4%
<i>Core(50+ times)</i>	N/A	0	15,347	61%	14,359	59%	N/A	-6.4%
Choreographed Exercise	N/A	100%	21,839	100%	22,616	100%	N/A	3.6%
<i>Casual (1-49 times)</i>	N/A	0	14,158	65%	14,867	66%	N/A	5.0%
<i>Core(50+ times)</i>	N/A	0	7,681	35%	7,748	34%	N/A	0.9%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Participation Growth/Decline	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

*Cardio Cross Trainer is merged to Elliptical Motion Trainer

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Aerobics (High Impact)	16,178	100%	21,390	100%	21,476	100%	32.7%	0.4%
<i>Casual (1-49 times)</i>	7,819	48%	11,801	55%	12,105	56%	54.8%	2.6%
<i>Core(50+ times)</i>	8,359	52%	9,589	45%	9,370	44%	12.1%	-2.3%
Stair Climbing Machine	12,979	100%	15,079	100%	14,948	100%	15.2%	-0.9%
<i>Casual (1-49 times)</i>	7,303	56%	9,332	62%	9,501	64%	30.1%	1.8%
<i>Core(50+ times)</i>	5,676	44%	5,747	38%	5,447	36%	-4.0%	-5.2%
Cross-Training Style Workout	N/A	100%	12,914	100%	13,622	100%	N/A	5.5%
<i>Casual (1-49 times)</i>	N/A	N/A	6,430	50%	6,890	51%	N/A	7.2%
<i>Core(50+ times)</i>	N/A	N/A	6,483	50%	6,732	49%	N/A	3.8%
Stationary Cycling (Group)	8,477	100%	8,937	100%	9,409	100%	11.0%	5.3%
<i>Casual (1-49 times)</i>	5,053	60%	5,751	64%	6,023	64%	19.2%	4.7%
<i>Core(50+ times)</i>	3,424	40%	3,186	36%	3,386	36%	-1.1%	6.3%
Pilates Training	8,519	100%	8,893	100%	9,047	100%	6.2%	1.7%
<i>Casual (1-49 times)</i>	5,212	61%	5,525	62%	5,698	63%	9.3%	3.1%
<i>Core(50+ times)</i>	3,307	39%	3,367	38%	3,348	37%	1.2%	-0.6%
Trail Running	5,806	100%	8,582	100%	9,149	100%	57.6%	6.6%
Cardio Kickboxing	6,725	100%	6,899	100%	6,693	100%	-0.5%	-3.0%
<i>Casual (1-49 times)</i>	4,455	66%	4,760	69%	4,671	70%	4.8%	-1.9%
<i>Core(50+ times)</i>	2,271	34%	2,139	31%	2,022	30%	-11.0%	-5.5%
Boot Camp Style Training	7,496	100%	6,583	100%	6,651	100%	-11.3%	1.0%
<i>Casual (1-49 times)</i>	4,787	64%	4,484	68%	4,637	70%	-3.1%	3.4%
<i>Core(50+ times)</i>	2,709	36%	2,099	32%	2,014	30%	-25.7%	-4.0%
Martial Arts	5,075	100%	5,745	100%	5,838	100%	15.0%	1.6%
<i>Casual (1-12 times)</i>	1,207	24%	1,964	34%	2,021	35%	67.4%	2.9%
<i>Core(13+ times)</i>	3,869	76%	3,780	66%	3,816	65%	-1.4%	1.0%
Boxing for Fitness	4,831	100%	5,175	100%	5,157	100%	6.7%	-0.3%
<i>Casual (1-12 times)</i>	2,075	43%	2,678	52%	2,738	53%	32.0%	2.2%
<i>Core(13+ times)</i>	2,756	57%	2,496	48%	2,419	47%	-12.2%	-3.1%
Tai Chi	3,203	100%	3,706	100%	3,787	100%	18.2%	2.2%
<i>Casual (1-49 times)</i>	1,835	57%	2,245	61%	2,329	61%	26.9%	3.7%
<i>Core(50+ times)</i>	1,369	43%	1,461	39%	1,458	39%	6.5%	-0.2%
Barre	N/A	N/A	3,329	100%	3,436	100%	N/A	3.2%
<i>Casual (1-49 times)</i>	N/A	N/A	2,636	79%	2,701	79%	N/A	2.5%
<i>Core(50+ times)</i>	N/A	N/A	693	21%	735	21%	N/A	6.1%
Triathlon (Traditional/Road)	1,789	100%	2,374	100%	2,162	100%	20.8%	-8.9%
<i>Casual (1 times)</i>	616	34%	786	33%	754	35%	22.4%	-4.1%
<i>Core(2+ times)</i>	1,173	66%	1,589	67%	1,408	65%	20.0%	-11.4%
Triathlon (Non-Traditional/Off Road)	1,075	100%	1,705	100%	1,878	100%	74.7%	10.1%
<i>Casual (1 times)</i>	341	32%	647	38%	749	40%	119.6%	15.8%
<i>Core(2+ times)</i>	734	68%	1,058	62%	1,129	60%	53.8%	6.7%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Participation Growth/Decline	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

OUTDOOR/ADVENTURE RECREATION

National Core vs Casual Participatory Trends - Outdoor / Adventure Recreation								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Hiking (Day)	34,519	100%	42,128	100%	44,900	100%	30.1%	6.6%
Bicycling (Road)	39,790	100%	38,365	100%	38,866	100%	-2.3%	1.3%
<i>Casual (1-25 times)</i>	18,966	48%	19,244	50%	20,212	52%	6.6%	5.0%
<i>Core(26+ times)</i>	20,824	52%	19,121	50%	18,654	48%	-10.4%	-2.4%
Fishing (Freshwater)	39,002	100%	38,121	100%	38,346	100%	-1.7%	0.6%
<i>Casual (1-7 times)</i>	20,341	52%	20,308	53%	19,977	52%	-1.8%	-1.6%
<i>Core(8+ times)</i>	18,660	48%	17,813	47%	18,369	48%	-1.6%	3.1%
Camping (< 1/4 Mile of Vehicle/Home)	31,454	100%	26,467	100%	26,262	100%	-16.5%	-0.8%
Camping (Recreational Vehicle)	15,903	100%	15,855	100%	16,159	100%	1.6%	1.9%
<i>Casual (1-7 times)</i>	8,316	52%	8,719	55%	9,332	58%	12.2%	7.0%
<i>Core(8+ times)</i>	7,587	48%	7,136	45%	6,826	42%	-10.0%	-4.3%
Fishing (Saltwater)	12,000	100%	12,266	100%	13,062	100%	8.9%	6.5%
<i>Casual (1-7 times)</i>	7,251	60%	7,198	59%	7,625	58%	5.2%	5.9%
<i>Core(8+ times)</i>	4,749	40%	5,068	41%	5,437	42%	14.5%	7.3%
Birdwatching (>1/4 mile of Vehicle/Home)	13,535	100%	11,589	100%	12,296	100%	-9.2%	6.1%
Backpacking Overnight	7,933	100%	10,151	100%	10,975	100%	38.3%	8.1%
Bicycling (Mountain)	7,265	100%	8,615	100%	8,609	100%	18.5%	-0.1%
<i>Casual (1-12 times)</i>	3,270	45%	4,273	50%	4,389	51%	34.2%	2.7%
<i>Core(13+ times)</i>	3,995	55%	4,342	50%	4,220	49%	5.6%	-2.8%
Archery	7,173	100%	7,903	100%	7,769	100%	8.3%	-1.7%
<i>Casual (1-25 times)</i>	5,967	83%	6,650	84%	6,602	85%	10.6%	-0.7%
<i>Core(26+ times)</i>	1,205	17%	1,253	16%	1,167	15%	-3.2%	-6.9%
Fishing (Fly)	5,848	100%	6,456	100%	6,791	100%	16.1%	5.2%
<i>Casual (1-7 times)</i>	3,598	62%	4,183	65%	4,448	65%	23.6%	6.3%
<i>Core(8+ times)</i>	2,250	38%	2,273	35%	2,344	35%	4.2%	3.1%
Skateboarding	6,227	100%	6,442	100%	6,382	100%	2.5%	-0.9%
<i>Casual (1-25 times)</i>	3,527	57%	3,955	61%	3,970	62%	12.6%	0.4%
<i>Core(26+ times)</i>	2,700	43%	2,487	39%	2,411	38%	-10.7%	-3.1%
Roller Skating (In-Line)	6,647	100%	5,381	100%	5,268	100%	-20.7%	-2.1%
<i>Casual (1-12 times)</i>	4,548	68%	3,861	72%	3,853	73%	-15.3%	-0.2%
<i>Core(13+ times)</i>	2,100	32%	1,520	28%	1,415	27%	-32.6%	-6.9%
Bicycling (BMX)	1,861	100%	3,104	100%	3,413	100%	83.4%	10.0%
<i>Casual (1-12 times)</i>	856	46%	1,760	57%	2,039	60%	138.2%	15.9%
<i>Core(13+ times)</i>	1,005	54%	1,344	43%	1,374	40%	36.7%	2.2%
Adventure Racing	1,618	100%	2,999	100%	2,529	100%	56.3%	-15.7%
<i>Casual (1 times)</i>	672	42%	1,081	36%	899	36%	33.8%	-16.8%
<i>Core(2+ times)</i>	945	58%	1,918	64%	1,630	64%	72.5%	-15.0%
Climbing (Traditional/Ice/Mountaineering)	2,189	100%	2,790	100%	2,527	100%	15.4%	-9.4%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Participation Growth/Decline	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

AQUATICS

National Core vs Casual Participatory Trends - Aquatics								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Swimming (Fitness)	23,216	100%	26,601	100%	27,135	100%	16.9%	2.0%
<i>Casual (1-49 times)</i>	15,139	65%	17,781	67%	18,319	68%	21.0%	3.0%
<i>Core(50+ times)</i>	8,077	35%	8,820	33%	8,815	32%	9.1%	-0.1%
Aquatic Exercise	9,177	100%	10,575	100%	10,459	100%	14.0%	-1.1%
<i>Casual (1-49 times)</i>	5,785	63%	7,135	67%	7,222	69%	24.8%	1.2%
<i>Core(50+ times)</i>	3,392	37%	3,440	33%	3,237	31%	-4.6%	-5.9%
Swimming (Competition)	2,502	100%	3,369	100%	3,007	100%	20.2%	-10.7%
<i>Casual (1-49 times)</i>	1,065	43%	1,881	56%	1,664	55%	56.2%	-11.5%
<i>Core(50+ times)</i>	1,437	57%	1,488	44%	1,343	45%	-6.5%	-9.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

WATER SPORTS/ACTIVITIES

National Core vs Casual Participatory Trends - Water Sports / Activities								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Canoeing	9,813	100%	10,046	100%	9,220	100%	-6.0%	-8.2%
Kayaking (Recreational)	8,187	100%	10,017	100%	10,533	100%	28.7%	5.2%
Snorkeling	8,664	100%	8,717	100%	8,384	100%	-3.2%	-3.8%
<i>Casual (1-7 times)</i>	6,904	80%	6,945	80%	6,721	80%	-2.7%	-3.2%
<i>Core(8+ times)</i>	1,760	20%	1,773	20%	1,663	20%	-5.5%	-6.2%
Jet Skiing	6,996	100%	5,783	100%	5,418	100%	-22.6%	-6.3%
<i>Casual (1-7 times)</i>	5,125	73%	4,143	72%	3,928	72%	-23.4%	-5.2%
<i>Core(8+ times)</i>	1,870	27%	1,640	28%	1,490	28%	-20.3%	-9.1%
Sailing	3,841	100%	4,095	100%	3,974	100%	3.5%	-3.0%
<i>Casual (1-7 times)</i>	2,565	67%	2,833	69%	2,720	68%	6.0%	-4.0%
<i>Core(8+ times)</i>	1,276	33%	1,262	31%	1,254	32%	-1.7%	-0.6%
Water Skiing	4,434	100%	3,700	100%	3,572	100%	-19.4%	-3.5%
<i>Casual (1-7 times)</i>	3,122	70%	2,667	72%	2,575	72%	-17.5%	-3.4%
<i>Core(8+ times)</i>	1,312	30%	1,033	28%	997	28%	-24.0%	-3.5%
Rafting	3,756	100%	3,428	100%	3,479	100%	-7.4%	1.5%
Stand-Up Paddling	1,392	100%	3,220	100%	3,325	100%	138.9%	3.3%
Kayaking (Sea/Touring)	2,446	100%	3,124	100%	2,955	100%	20.8%	-5.4%
Scuba Diving	2,781	100%	3,111	100%	2,874	100%	3.3%	-7.6%
<i>Casual (1-7 times)</i>	1,932	69%	2,292	74%	2,113	74%	9.4%	-7.8%
<i>Core(8+ times)</i>	849	31%	819	26%	761	26%	-10.4%	-7.1%
Wakeboarding	3,368	100%	2,912	100%	3,005	100%	-10.8%	3.2%
<i>Casual (1-7 times)</i>	2,237	66%	2,017	69%	2,101	70%	-6.1%	4.2%
<i>Core(8+ times)</i>	1,132	34%	895	31%	903	30%	-20.2%	0.9%
Surfing	2,545	100%	2,793	100%	2,680	100%	5.3%	-4.0%
<i>Casual (1-7 times)</i>	1,544	61%	1,768	63%	1,705	64%	10.4%	-3.6%
<i>Core(8+ times)</i>	1,001	39%	1,024	37%	975	36%	-2.6%	-4.8%
Kayaking (White Water)	1,878	100%	2,552	100%	2,500	100%	33.1%	-2.0%
Boardsailing/Windsurfing	1,372	100%	1,737	100%	1,573	100%	14.7%	-9.4%
<i>Casual (1-7 times)</i>	1,108	81%	1,449	83%	1,289	82%	16.3%	-11.0%
<i>Core(8+ times)</i>	264	19%	288	17%	284	18%	7.6%	-1.4%

NOTE: Participation figures are in 000's for the US population ages 6 and over

Participation Growth/Decline	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)	More Core Participants (56-74%)	Evenly Divided (45-55% Core and Casual)	More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)