

APPENDIX B: PARTICIPATION AND TRENDS

National Sporting Goods Association Data

Each year the National Sporting Goods Association (NSGA) commissions a self-administered mail survey to obtain information on sports participation. Over 35,000 surveys were distributed to pre-recruited households, and the male and female heads of household and up to two other household members (at least seven years of age) indicate their age, sports they participated in 2002, and the number of days of participation in 2002.

For the survey, a participant is defined as an individual seven years of age or older who participated in a sport **more than once a year**. Several sports including aerobic exercising, bicycle riding, calisthenics, exercising with equipment, running/jogging, step aerobics, and swimming are categorized as fitness activities, and participation is defined as **six times or more during the year**.

In 2002, the five most popular activities with survey respondents included: exercise walking, camping, swimming, exercising with equipment, and fishing.

Table 4: National Recreation Participation in 2002: Top Ten Activities Ranked by Total Participation

Sport	Total Participation (in Millions)	Percent Change From 1997
Exercise Walking	82.2	7.7%
Camping (vacation/overnight)	55.4	18.9%
Swimming	54.7	-8.2%
Exercising with Equipment	50.2	4.9%
Fishing	44.2	-1.2%
Bowling	43.9	-1.9%
Bicycle Riding	41.4	-8.3%
Billiards/Pool	35.3	-2.0%
Hiking	30.5	7.7%
Aerobic Exercise	29.0	10.6%

Source: National Sporting Goods Association

Table 5: National Recreation Participation of Women in Selected Sports: Comparison 2002 vs. 1997

Sport	Total Female 2002 (in Millions)	Percent Female 2002	Percent Female 1997	Percent Difference
Martial Arts	1.8	42.8%	36.4%	6.5%
Mountain Biking (off road)	2.9	37.5%	31.5%	5.9%
Running/ Jogging	11.4	46.0%	41.6%	4.4%
Volleyball	6.2	54.5%	51.1%	3.4%
Camping (vacation/overnight)	26.7	48.1%	46.1%	2.0%
Swimming	29.2	53.4%	52.8%	0.6%
Exercising with Equipment	27.1	54.0%	53.7%	0.3%
Exercise Walking	51.6	62.8%	63.1%	-0.2%
Golf	5.8	20.7%	21.5%	-0.8%
Aerobic Exercise	21.3	73.2%	76.3%	-3.1%

Source: National Sporting Goods Association

Table 6: National Recreation Participation in 2002 of Selected Sports (Ranked by Percent Change from 1997 to 2002)

Sport	Total Participation (in Millions)	Percent Change 2001 to 2002	Percent Change 1997 to 2002
Snowboarding	5.6	4.6%	98.5%
Skateboarding	9.7	0.4%	52.6%
Hunting with Firearms	19.5	1.6%	14.4%
Aerobic Exercise	29.0	10.4%	10.6%
Hiking	30.5	17.0%	7.7%
Exercise Walking	82.2	5.0%	7.7%
Canoeing	7.6	11.5%	7.1%
Swimming	54.7	-0.2%	-8.2%
Martial Arts	4.2	-18.3%	-14.4%
In-Line Skating	18.8	-2.0%	-29.0%

Source: National Sporting Goods Association

Table 7: National Youth Participation in Selected Sports (Comparison by Age Group 2002 vs. 1992)

Sport	Total Percent Change since 1992 (Ages 7-17)	Total Percent Change since 1992 (Ages 7-11)	Total Percent Change since 1992 (Ages 12-17)
Total U.S.	10.4%	8.4%	15.4%
Baseball	3.2%	3.6%	-7.1%
Basketball	2.7%	13.9%	-4.8%
Bicycle Riding	-24.2	-24.9	-23.5%
Fishing	-7.5%	13.8%	-4.0%
Golf	17.6	4.3%	26.9%
Ice Hockey	31.6%	-46.6%	62.8%
In-line Skating	93.9%	101.0%	78.3%
Skateboarding	75.0%	70.2%	86.7%
Skiing (Alpine)	-31.3%	20.9%	-33.5%
Snowboarding	355.5%	487.3%	220.3%
Soccer	28.4%	37.8%	-0.8%
Softball	-29.0%	-29.5%	-28.7%
Tennis	-36.7%	-29.5%	-35.3%
Volleyball	-48.3%	-19.5%	-40.5%

Source: National Sporting Goods Association

Table 8: Recreation Activities for Adults 55 and Older Based on Frequent Participation 2002

Activity	Days Per Year	Participants
Fitness Walking	100 +	6,515,000
Stretching	100 +	4,107,000
Treadmill Exercise	100 +	3,887, 000
Golf	25 +	3,646,000
Freshwater Fishing	15 +	1,903,000
R.V. Camping	15 +	1,736,000
Lifting Free Weights	100 +	1,735,000
Bowling	25 +	1,725,000
Day Hiking	15 +	1,545,000
Weight/Resistance Machines	100 +	1,513,000
Stationary Cycling	100 +	1,298,000
Running/Jogging	100 +	870,000

Source: American Sports Data, Inc.

Outdoor Recreational Pursuits

The NSGA 2002 Survey on sports participation is a primary tool used to follow outdoor recreational pursuits. The following information was gathered by a mail panel resource of more than 20,000 pre-recruited households. Through a self-administered questionnaire, male and female heads of household and up to two other household members who were at least seven years of age were asked to indicate the sports they participated in 2002, along with the frequency of participation in 2002.

For this study, a participant is defined as an individual seven years of age or older who participates in a sport **more than once a year**.

Table 9: Outdoor Recreation Participation (Percentage Change from 1997-2002)

Outdoor Activity	Total Participation 2002 (in Millions)	Percent Change From 1997
Camping (vacation/overnight)	55.4	18.9%
Camping (backpack/wilderness)	15.5	29.1%
Hunting with Firearms	19.5	14.4%
Muzzle loading	3.6	22.5%
Hunting with Bow & Arrow	4.6	-13.1%
Canoeing	7.6	7.1%
Boating, Motor/Power	26.6	-2.0%
Water Skiing	6.9	6.3%
Fishing	44.2	-1.2%

Source: National Sporting Goods Association

GENERAL TRENDS IN PARKS and RECREATION

The greatest trend found in recreation is not a particular sport but rather a sport participant. Baby boomers, defined as anyone born between 1946 and 1964, consist of 76 million people. By 2005, an estimated 42 percent of baby boomers will be over 50 years of age. Below are statistical data on boomers and implications on recreational services for this influential group. Information for this report was gathered by NRPA, AARP, SGMA, and GreenPlay LLC.

Miscellaneous Leisure Trends

The following list of trends was produced by data collected by the Sporting Goods Manufacturers Association, GreenPlay LLC, Roper Research, Leisure Vision, EDAW, Inc., NRPA, Leon Younger and Pros, NSGA, John Crompton Publications, and *Athletic Business*.

- More women than men participate in fitness programs outside the home.
- Americans have less leisure time than 5 years ago, but recognize the intrinsic and extrinsic value of recreation and leisure more than ever.

- The greater the household income, the more likely that members started a new recreational activity in the last year, and patronized public parks and recreation services.
- Participation in structured programmed activities has decreased.
- Americans are participating in less of a variety of activities.
- Currently, opportunities for park and recreation participation are greater in mid-sized cities, as opposed to smaller or larger cities.
- Americans spend more than \$300 billion on recreation annually.
- The average recreation fee that people are willing to pay is slightly over \$12. However, the more satisfied they are with the experience, the more they are willing to pay.
- Choices for recreational activities continue to grow with malls, school activities, entertainment centers (Dave and Buster's, Adventure Golf, etc.), movie complexes, IMAX, skate parks, etc.
- Parks and recreation departments compete directly for recreation dollars with private offerings (health clubs, country clubs, etc.), amusement parks, hobby clubs, and travel and tourism.
- Many homes today are designed as central entertainment centers with televisions, computers, home fitness equipment, workshop and hobby areas, etc.
- On average, Americans watch more than four hours of television a day.

Programming Trends

- People have less unstructured time, so length of programs and sessions should be reduced.
- Activities are moving towards unstructured, individual, and drop-in programs.
- Information technologies allow for the design and customizing of recreation and fitness activities (reducing the need for a “standard package”).
- People are moving away from teams to activities that are more individual.
- Increasing demand for self-directed activities, with less reliance on instructors and more flexible timing.
- Increased demand for family programs and more programs for girls and women.
- Increased pressure to open traditional male sports to females.
- More activities are being adapted for disabled participants. Programs should strive to be “universally” accessible.
- Fitness and wellness are viewed as a lifestyle that stresses the integration of mental, physical, and spiritual well being.
- Recreation agencies are forming strategic alliances with health, social services, and educational agencies to offer more comprehensive health and wellness assistance.
- Programs need to encompass a whole “experience,” as people look to add quality to the basic recreation activity with depth, self-fulfillment, and self-expression.
- People desire quality over quantity - a first class experience in the form of excellent customer service, programs, and facilities.

Facilities Trends

Transition of Amenities from “Alternative” to “Typical”

- Multi-purpose, large regional centers (65,000 to 125,000+ sq. ft.) for all ages/abilities with all amenities in one place. This design saves on staff costs, encourages retention and participation, and saves on operating expenses due to economies of scale.
- Leisure and therapeutic pools
- Interactive game rooms
- Nature centers/outdoor recreation and education centers
- Regional playground for all ages of youth
- In-line hockey and skate parks
- Partnerships with private or other agencies
- Teen centers
- Indoor walking tracks
- Themed décor

“Alternative” Amenities Increasing in Popularity

- Leisure ice rink
- Climbing walls
- BMX tracks and indoor soccer
- Cultural art facilities

Management Trends

- Agencies across the U.S. are increasing revenue production and cost recovery.
- Level of subsidy for programs is lessening and more “enterprise” activities are being developed, thereby allowing subsidy to be used more appropriately.
- Agencies are hiring consultants for master planning, feasibility, and strategic/policy plans.
- Recreation programmers and administrators are being involved at the beginning of the planning process.
- Information technology allows for tracking and reporting.
- Pricing is often done by peak, off-peak, and off-season rates.
- More agencies are partnering with private, public, and non-profit groups.
- The current national trend is toward a “one-stop” facility to serve all ages. Large, multi-purpose regional centers help increase cost recovery, promote retention, and encourage cross-use.
- Organization is structured away from specific geographic units into agency-wide sections for athletics, youth/teen sports, seniors, facilities, parks, planning, etc.