

CHAPTER ONE – DEMOGRAPHIC & RECREATION TRENDS ANALYSIS

1.1 INTRODUCTION

A key component of the Parks & Recreation Strategic Master Plan (“Plan”) is a Demographic & Recreation Trends Analysis. The purpose of this analysis is to provide the Department of Parks and Recreation (“Department”) insight into the general makeup of the population they serve and identify market trends in recreation. It also helps quantify the market in and around Beaufort County (“County”) and assists in providing a better understand of the types of parks, facilities, and programs / services that are most appropriate to satisfy the needs of residents.

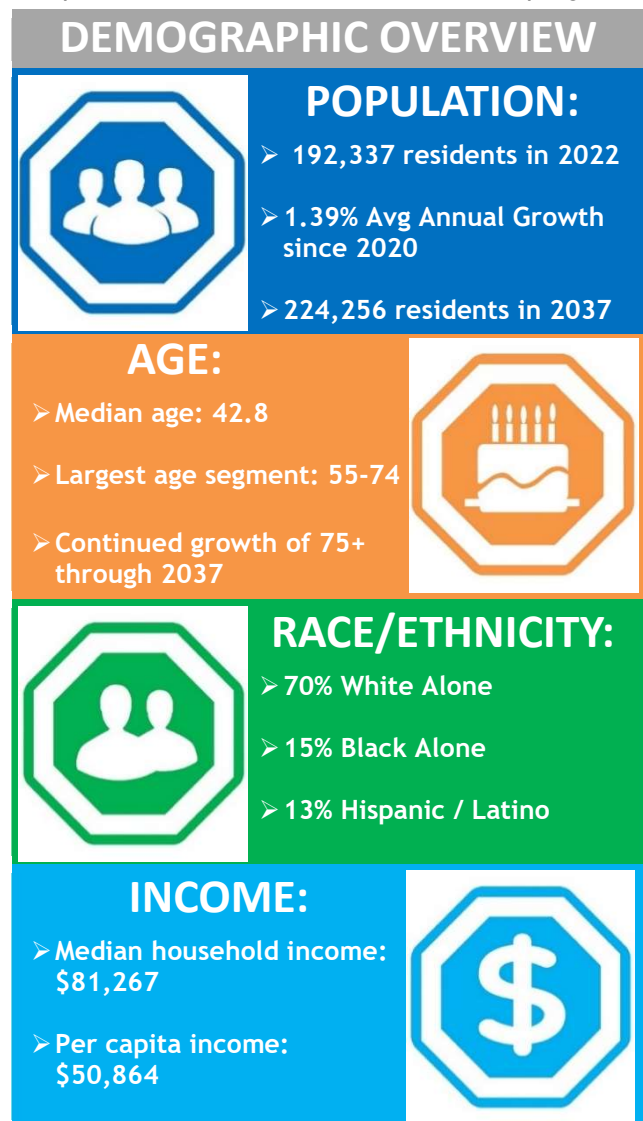


This analysis is two-fold - it aims to answer the *who* and the *what*. First, it assesses the demographic characteristics and population projections of County residents to understand *who* the Department serves. Secondly, recreational trends are examined on a national and local level to understand *what* the population served wants to do. Findings from this analysis establish a fundamental understanding that provide a basis for prioritizing the community need for parks, trails, facilities, and recreation programs.

1.2 DEMOGRAPHIC ANALYSIS

The Demographic Analysis describes the population within the County of Beaufort, South Carolina. This assessment is reflective of the County’s total population and its key characteristics such as age segments, race, ethnicity, and income levels. 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.

The infographic to the right provides an overview of the County’s populace based on current estimates of the 2022 population. A further analysis of each of these demographic characteristics (population, age segments, race, ethnicity, and income) can be found in section 1.2.2

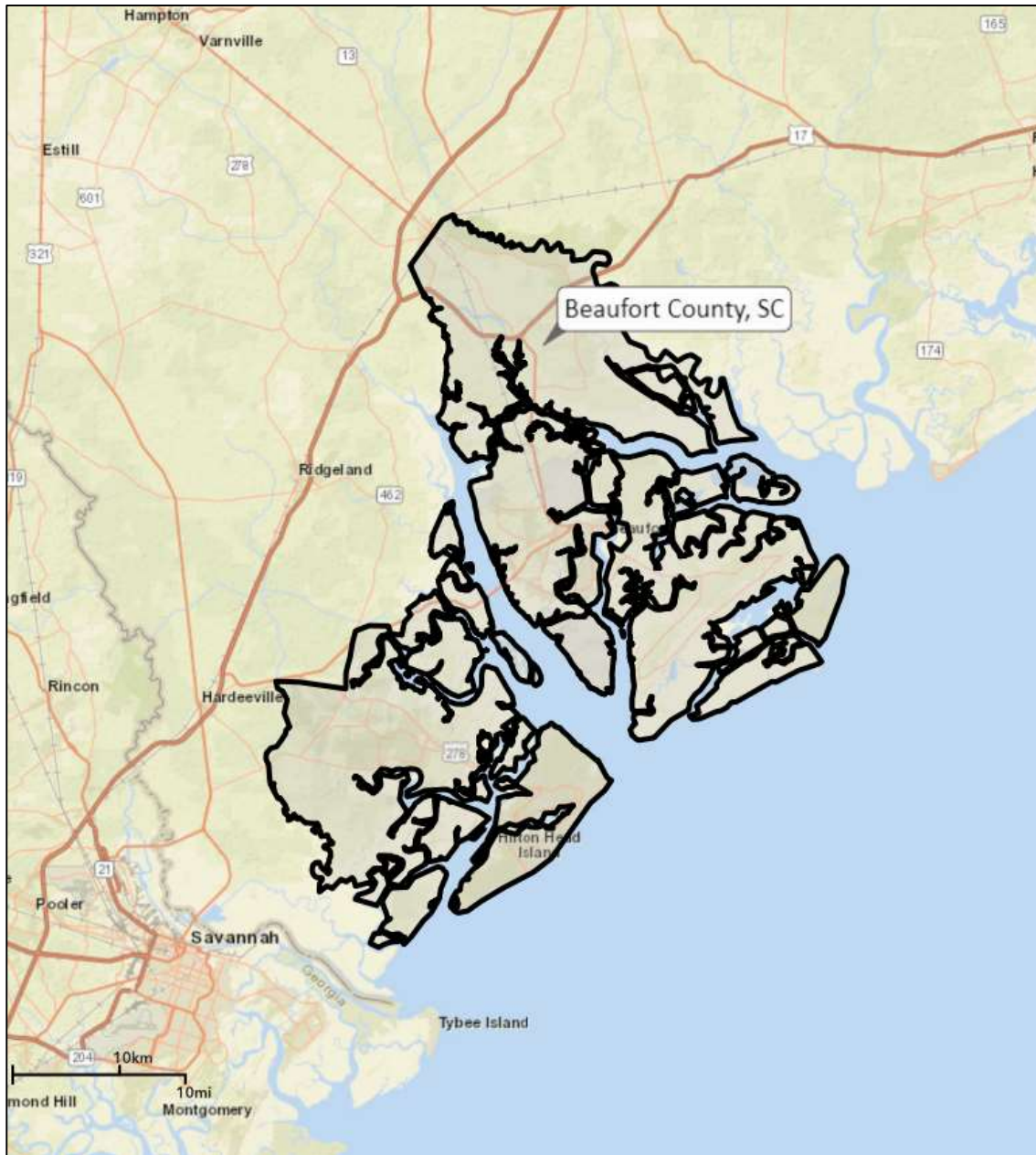


1.2.1 METHODOLOGY

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 January 2023 and reflects actual numbers as reported in the 2020 Census. ESRI then estimates the current population (2022) as well as a 5-year projection (2027). PROS then utilized straight line linear regression to forecast demographic characteristics for 10 and 15-year projections (2032 and 2037).

DEMOGRAPHIC ANALYSIS BOUNDARY

The County boundaries shown below were utilized for the demographic analysis.

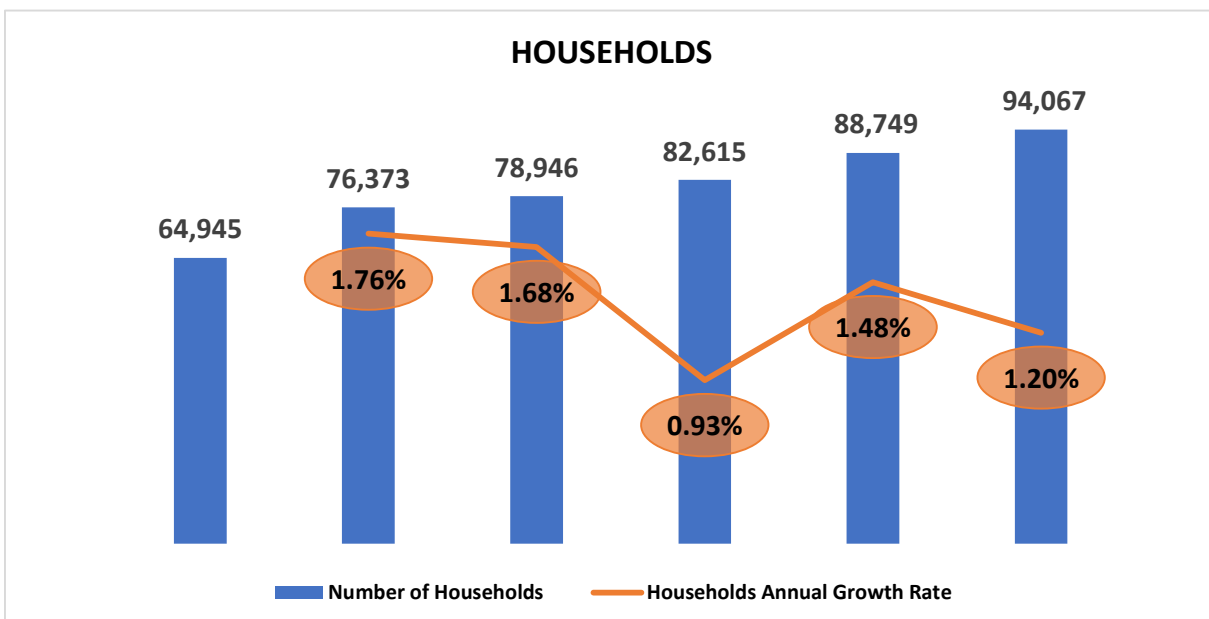
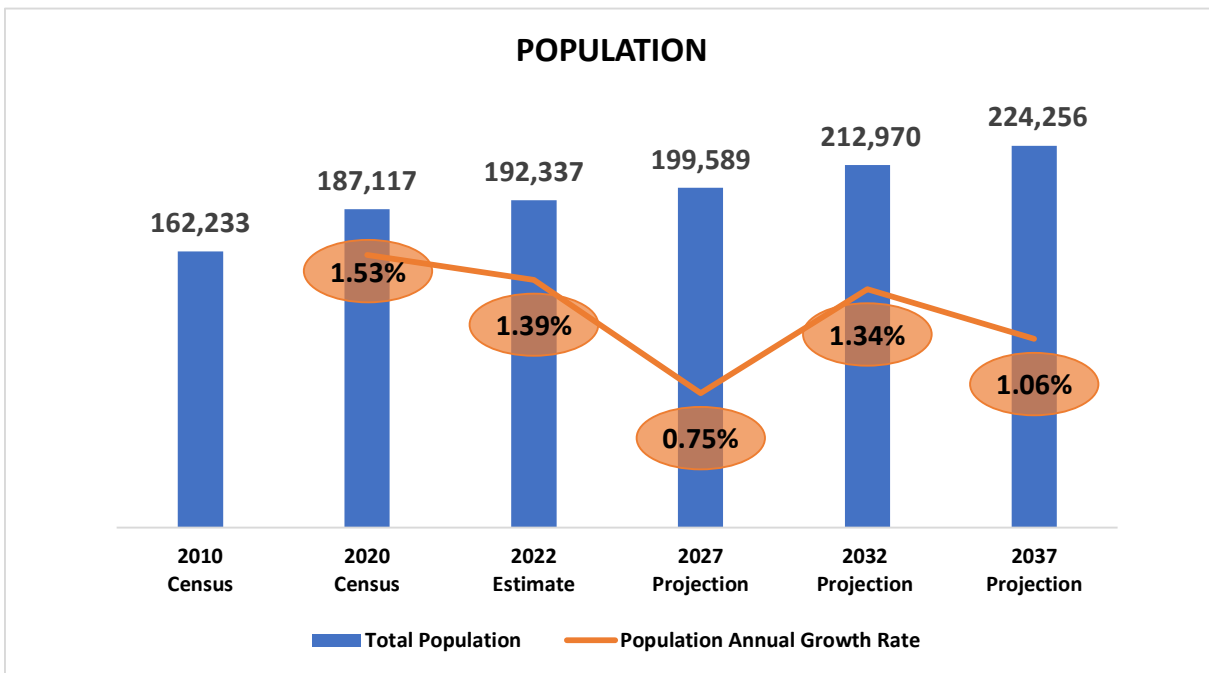


1.2.2 COUNTY POPULACE

POPULATION

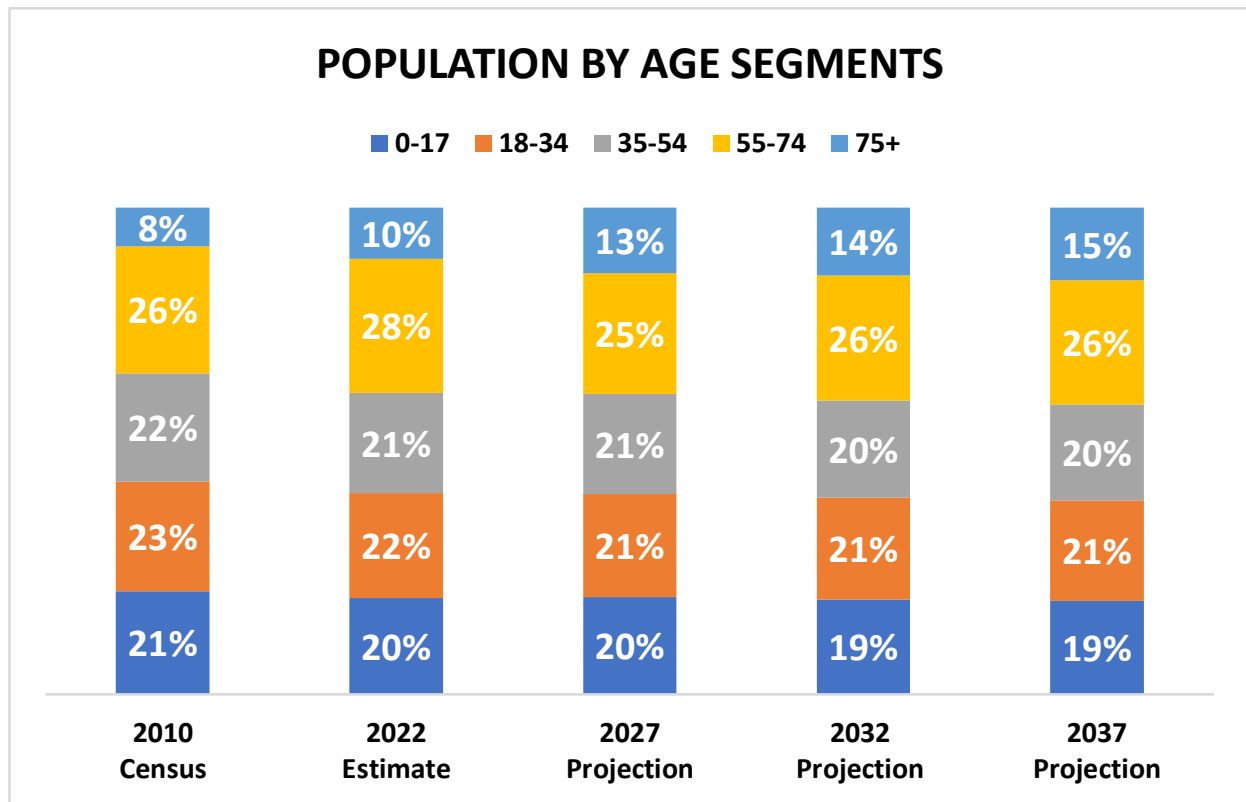
The County’s population has experienced significant growth in recent years, increasing nearly 16% since the 2010 Census, which is more than double the National growth rate of 7.4% over that same time period. Like the population, the total number of households also experienced a similar increase of 17.8% over the past 12 years, or 1.48% annually.

Currently, the population is estimated at 192,337 individuals living within 76,373 households. Projecting ahead, the total population growth is expected to continue increasing at an above average rate. By 2037, the County’s population is projected to be 224,256 residents living within 94,067 households.



AGE SEGMENT

Evaluating the County’s age segmentation, the population exhibits a slight aging trend, with approximately 38% of its residents being 55+ years old. The County’s current median age is estimated at 42.8 years old which is nearly four years above the U.S. median age (38.9 years old). Assessing the population as a whole, the County is projected to continue its current aging trend. Within the next 15 years the 55+ population is expected to climb to over 40% of the County’s total population. This is likely to be a result of increased life expectancies, a desirable retirement destination and most middle-aged adult residents “aging in place”.



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 who is struggling with rheumatoid arthritis may be limited to leisure recreation while a healthy 65-year-old may still be running 5K’s on an annual basis. Therefore, it may be more useful to divide this age segment into “Active,” “Low-Impact,” and/or “Social” Seniors.

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 below. The Census 2020 data on race are not directly comparable with data from the 2010 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 2020) definitions and nomenclature are used within this analysis.

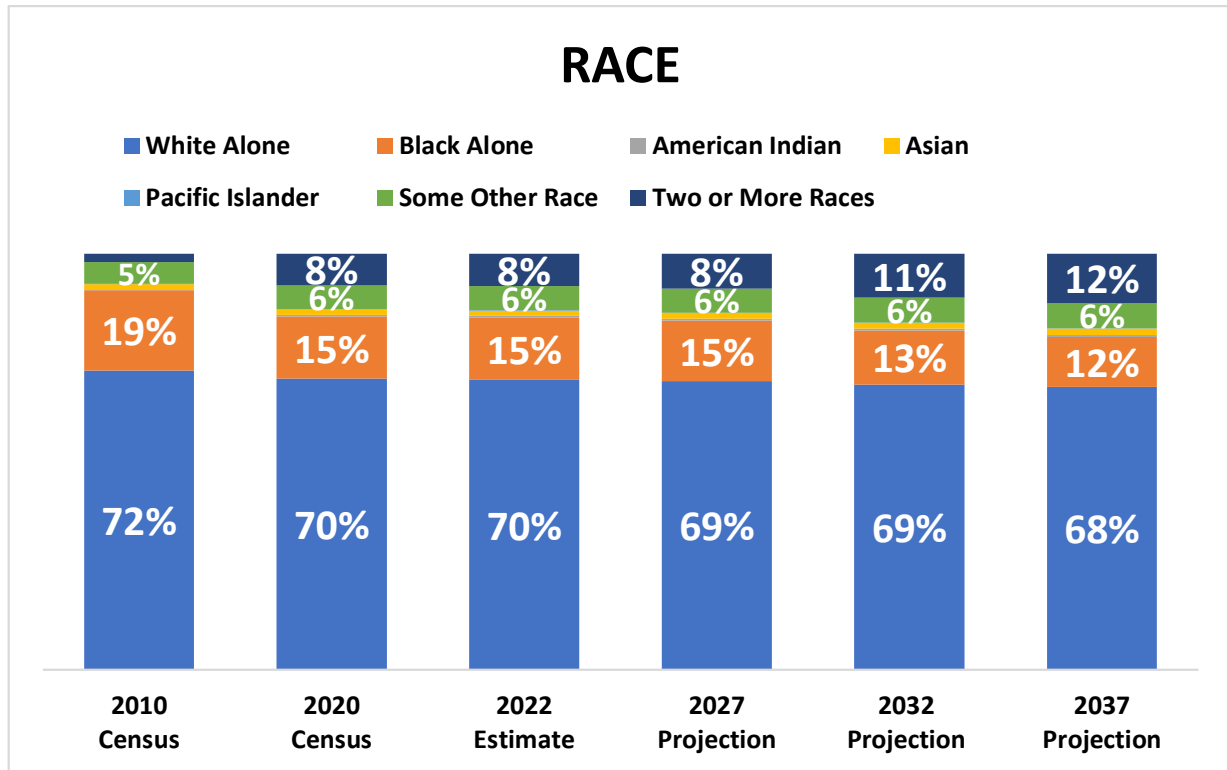
- **American Indian** - This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- **Asian** - This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- **Black or African American** - 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

Census states that the race and ethnicity categories generally reflect social definitions in the U.S. and are not an attempt to define race and ethnicity biologically, anthropologically, or genetically. We recognize that the race and ethnicity categories include racial, ethnic, and national origins and sociocultural groups.”

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.

RACE

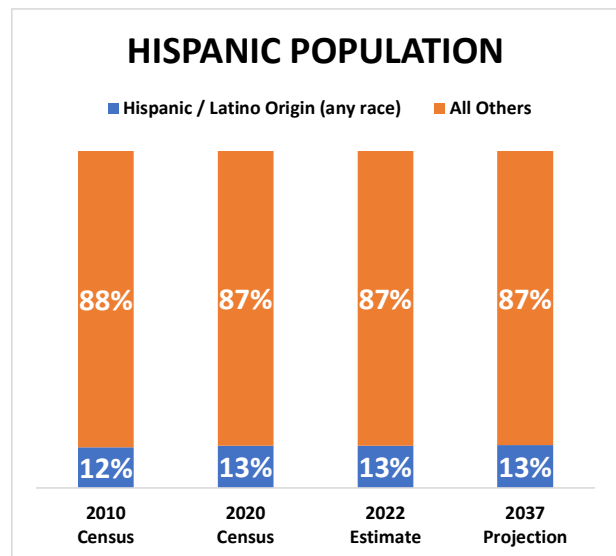
Analyzing race, the County’s current population is predominantly White Alone. The 2022 estimate shows that 70% of the population falls into the White Alone category, with Black Alone (15%) representing the largest minority. The 2022 estimate also portrays a below average representation of all other minority groups when compared to the national population, with American Indian (0.4%) and Asian (1.3%) populations being substantially lower than the National average. Predictions for 2037 expect the population to become slightly more diverse, with a decrease in the White Alone population, accompanied by minor increases to all other race categories.



ETHNICITY

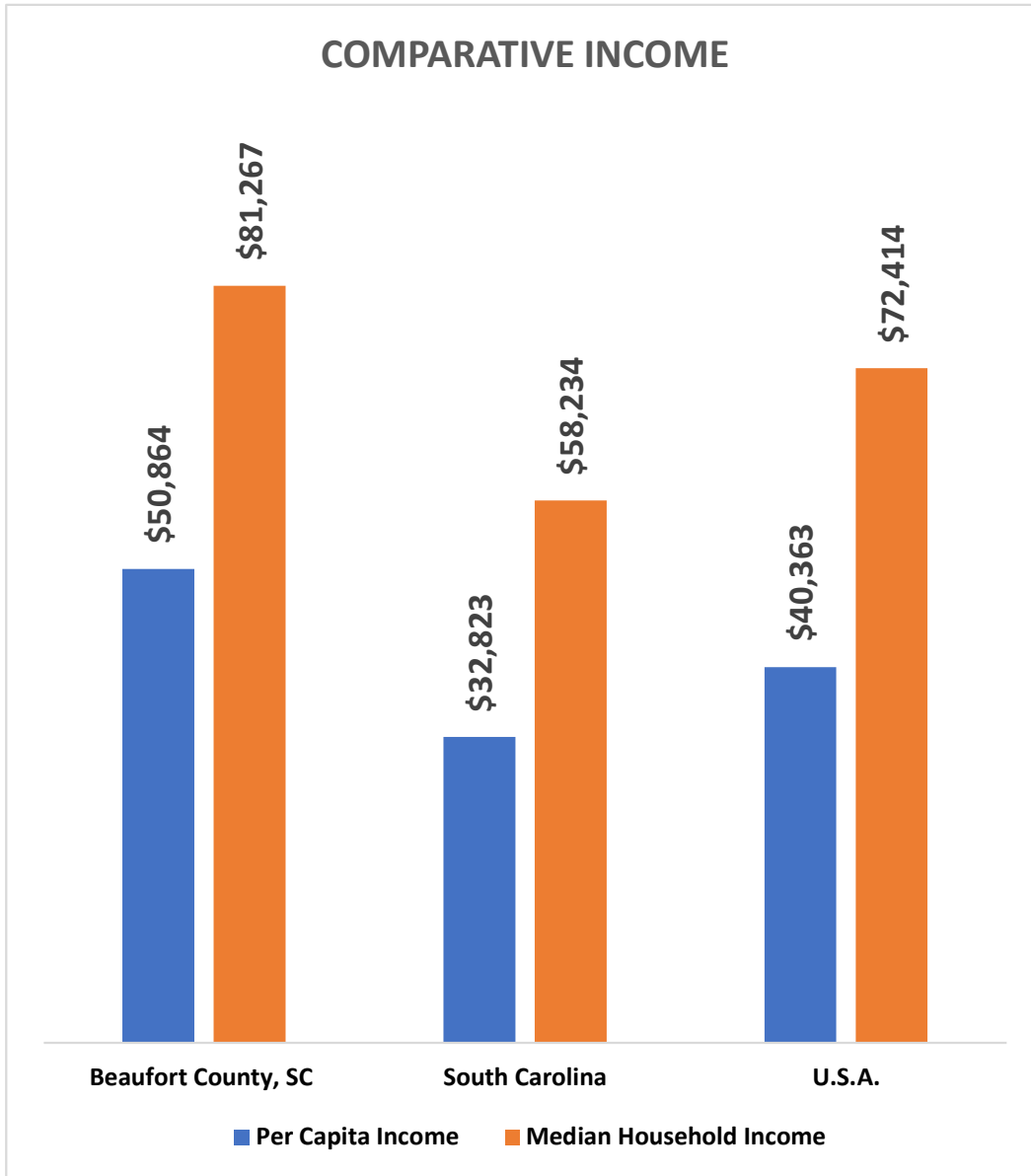
The County’s population was also assessed based on Hispanic/Latino ethnicity, which by the Census Bureau definition is viewed independently from race. It is important to note that individuals who are Hispanic/Latino in ethnicity can also identify with any racial categories identified above.

Based on the current 2021 estimate, people of Hispanic/ Latino origin represent approximately 13% of the County’s population, which is well below the national average (19% Hispanic/Latino). Additionally, the Hispanic/ Latino population has increased marginally since the 2010 census and is expected to remain steady over the next 15 years.



HOUSEHOLD INCOME

As seen below, the County's per capita income (\$50,864) and median household income (\$81,267) are both higher than the state and national averages. The per capita income is defined as that earned by a single individual while the median household income is based on the total income of everyone over the age of 16 living under the same roof. These above average income characteristics should be taken into consideration when the Department is pricing out programs and calculating cost recovery goals.



DEMOGRAPHIC SUMMARY

- The County's recent **population annual growth rate** (1.39%) is significantly higher than the U.S.'s (0.2%) annual growth rate.
- When assessing **age segments**, the County exhibits a slightly older population when compared to the national age segment distribution.
- The County's **racial distribution** is notably less diverse than the national population distribution, with a much greater White Alone population percentage.
- Beaufort County's percentage of **Hispanic/Latino population** (12.5%) is approximately two-thirds of the national average (19.0%).
- The County's **per capita income** (\$50,864) and **median house income** (\$81,267) are both higher than state (\$32,823 & \$58,234) and national (\$40,363 & \$72,414) averages.



1.2.3 DEMOGRAPHIC IMPLICATIONS

While it is important not to generalize recreation needs and priorities based solely on demographics, the analysis suggests some potential implications for the County.

First, with the population expecting above average growth for the foreseeable future, it is suggested that the County should continue the upkeep of existing facilities in addition to planning to expand facility space and program offerings in order to accommodate the growing population.

Second, the County's aging trend may indicate the need to provide more programs and services for the 55+ population. Such a focus could also potentially attract more baby boomers to retire in Beaufort County. However, it will also be important to continue providing services for the 62% of residents who are currently under 55 years old.

Third, the County's above average income characteristics suggest potential disposable income. The Department should be mindful of this when pricing offerings and calculating cost recovery goals.

Finally, the County's racial diversity is expected to become more diverse, stressing the importance of the Department continuing to have diversity of all types reflected in its offerings, marketing/communications, and public outreach.

1.3 RECREATIONAL TRENDS ANALYSIS

The Trends Analysis provides an understanding of national, regional, and local recreational trends as well as recreational interest by age segments. Trends data used for this analysis was obtained from Sports & Fitness Industry Association's (SFIA), National Recreation and Park Association (NRPA), and Environmental Systems Research Institute, Inc. (ESRI). All trend data is based on current and/or historical participation rates, statistically valid survey results, or NRPA Park Metrics.

1.2.1 NATIONAL TRENDS IN RECREATION

METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Leisure Activities Topline Participation Report 2022* was utilized in evaluating the following trends:

- National Recreation Participatory Trends
- Core vs. Casual Participation Trends



The study is based on findings from surveys carried out in 2021 by the Physical Activity Council (PAC), resulting in a total of 18,000 online interviews. Surveys were administered to all genders, ages, income levels, regions, and ethnicities to allow for statistical accuracy of the national population. A sample size of 18,000 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 plus or minus 0.32 percentage points at a 95 percent confidence level. Using a weighting technique, survey results are applied to the total U.S. population figure of 304,745,039 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. This study looked at 118 different sports/activities and subdivided them into various categories including: sports, fitness, outdoor activities, aquatics, etc.

CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency of participation. 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 activities more than 50-times per year, while for sports, the threshold for core participation is typically 13-times per year.

In each 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.

1.2.2 IMPACT OF COVID-19

Approximately 232.6 million people ages 6 and over reported being active in 2021, which is a 1.3% increase from 2020 and the greatest number of active Americans in the last 5 years (see Figure 8). There were more things to do as outdoor activities thrived, fitness at home became more popular, and team sports started back up after the COVID-19 hiatus.

Americans continued to practice yoga, attend Pilates training, and workout with kettlebells. They were drawn to the ease of pickleball and the competitiveness of tennis. Many started indoor climbing, while others took to the hiking trail. The waterways traffic had an increase of stand-up paddlers, kayaks, and jet skis. Gymnastics, swimming on a team, court volleyball, and fast-pitch softball benefited from the participation boom created from the Olympics.

Water sports had the largest gain in participation rates. Activities such as kayaking, stand-up paddling, and boardsailing/windsurfing all contributed to the 2.0 percent increase. Outdoor sports continued to grow with 53.9 percent of the U.S. population participating. This rate remains higher than pre-pandemic levels, having 6.2 percent gain over 50.7 percent participation rate in 2019. The largest contributor to this gain was trail running having increased 5.6 percent in one year and 13.9 percent from 2019.

Generationally, fitness sports continue to be the go-to means of exercise for Boomers, Gen X, and Millennials. Over half of the Gen X, Millennials, and Gen Z generation participated in one type of outdoor activity. Team sports were heavily dominated by generation Gen Z.

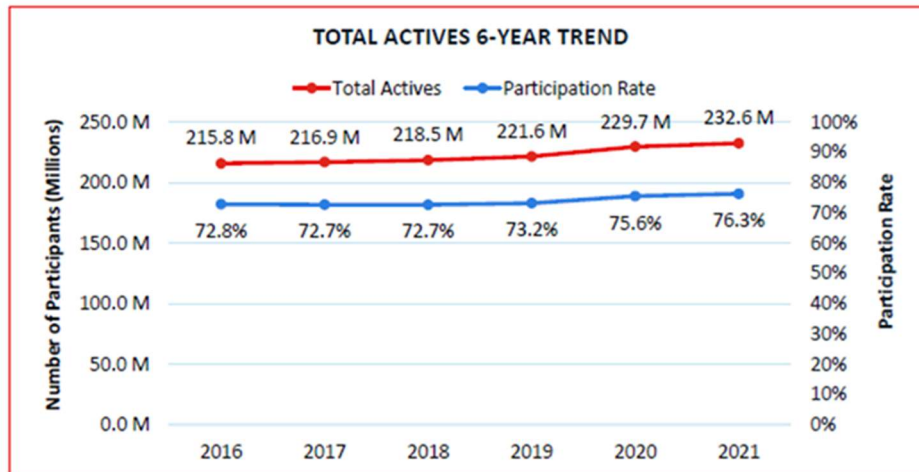


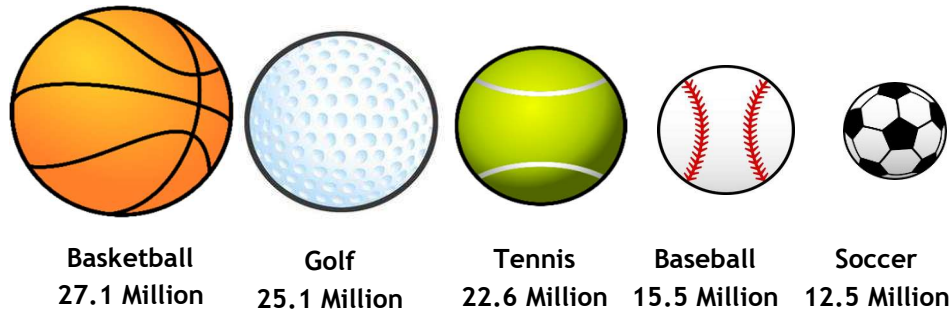
Figure 8: Total Actives 6-Year Trend

1.2.3 NATIONAL TRENDS IN RECREATION

PARTICIPATION LEVELS

The top sports most heavily participated in the United States were Basketball (27.1 million), Golf (25.1 million), and Tennis (22.6 million) which have participation figures greater than the other activities within the general sports category. Baseball (15.5 million), and Outdoor Soccer (12.5 million) round out the top five.

The popularity of Basketball, Golf, and Tennis can be attributed to the ability to compete with relatively small number of participants, this coupled with an ability to be played outdoors and/or properly distanced helps explain their popularity during the COVID-19 pandemic. Basketball’s overall success can also 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 many American dwellings as a drive-way pickup game. Golf continues to benefit from its wide age segment appeal and is considered a life-long sport. In addition, target type game venues or Golf Entertainment Venues have increased drastically (72.3%) as a 5-year trend, using Golf Entertainment (e.g., Top Golf) as a new alternative to breathe life back into the game of golf.



FIVE-YEAR TREND

Since 2016, Pickleball (71.2%), Golf- Entertainment Venues (51.3%), and Tennis (25.1%) have shown the largest increase in participation. Similarly, Boxing for Fitness (21.4%) and Competition (20.7%) have also experienced significant growth. Based on the five-year trend from 2016-2021, the sports that are most rapidly declining in participation include Ultimate Frisbee (-40.4%), Roller Hockey (-26.1%), Volleyball (Sand/Beach) (-23.8%), Squash (-23.5%), Slow Pitch Softball (-21.9%), and Gymnastics (-20.7%).

ONE-YEAR TREND

The most recent year shares some similarities with the five-year trends; with Pickleball (14.8%) and Boxing for Competition (7.3%) experiencing some of the greatest increases in participation this past year. The greatest one-year increases also include Fast Pitch Softball (15.3%), Gymnastics (10.9%), and Court Volleyball (8.1%). Basketball (-2.2%), Flag Football (-1.6%), Indoor Soccer (-0.6%) and Baseball (-0.5%) have shown a five-year trend increase, but a one-year trend decrease. This is likely a direct result of the growth coming out of the COVID-19 pandemic when all participation rates were minimal or non-existent. Similarly, other team sports such as Ultimate Frisbee (-5.8%), Slow Pitch Softball (-5.4%), Roller Hockey (-5%), Racquetball (-4.8%) and Beach/Sand Volleyball (-3.1%), also had significant decreases in participation over the last year.

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

Highly participated in sports, such as Basketball, Baseball, and Slow Pitch Softball generally have a larger core participant base (participate 13+ times per year) than casual participant base (participate 1-12 times per year). Due to the COVID-19 Pandemic, most activities showed a decrease in their percentage of core participants. However, there were significant increases in the percentage of casual participation for Court Volleyball, Pickleball, Fast Pitch Softball, Gymnastics and Lacrosse in the past year. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2016	2020	2021	5-Year Trend	1-Year Trend
Basketball	22,343	27,753	27,135	21.4%	-2.2%
Golf (9 or 18-Hole Course)	23,815	24,804	25,111	5.4%	1.2%
Tennis	18,079	21,642	22,617	25.1%	4.5%
Baseball	14,760	15,731	15,587	5.6%	-0.9%
Soccer (Outdoor)	11,932	12,444	12,556	5.2%	0.9%
Golf (Entertainment Venue)	8,173	12,057	12,362	51.3%	2.5%
Softball (Slow Pitch)	7,690	6,349	6,008	-21.9%	-5.4%
Football (Flag)	6,173	7,001	6,889	11.6%	-1.6%
Volleyball (Court)	6,216	5,410	5,849	-5.9%	8.1%
Badminton	7,354	5,862	6,061	-17.6%	3.4%
Soccer (Indoor)	5,117	5,440	5,408	5.7%	-0.6%
Football (Touch)	5,686	4,846	4,884	-14.1%	0.8%
Football (Tackle)	5,481	5,054	5,228	-4.6%	3.4%
Gymnastics	5,381	3,848	4,268	-20.7%	10.9%
Volleyball (Sand/Beach)	5,489	4,320	4,184	-23.8%	-3.1%
Track and Field	4,116	3,636	3,587	-12.9%	-1.3%
Cheerleading	4,029	3,308	3,465	-14.0%	4.7%
Pickleball	2,815	4,199	4,819	71.2%	14.8%
Racquetball	3,579	3,426	3,260	-8.9%	-4.8%
Ice Hockey	2,697	2,270	2,306	-14.5%	1.6%
Ultimate Frisbee	3,673	2,325	2,190	-40.4%	-5.8%
Softball (Fast Pitch)	2,467	1,811	2,088	-15.4%	15.3%
Lacrosse	2,090	1,884	1,892	-9.5%	0.4%
Wrestling	1,922	1,931	1,937	0.8%	0.3%
Roller Hockey	1,929	1,500	1,425	-26.1%	-5.0%
Boxing for Competition	1,210	1,361	1,460	20.7%	7.3%
Rugby	1,550	1,242	1,238	-20.1%	-0.3%
Squash	1,549	1,163	1,185	-23.5%	1.9%

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

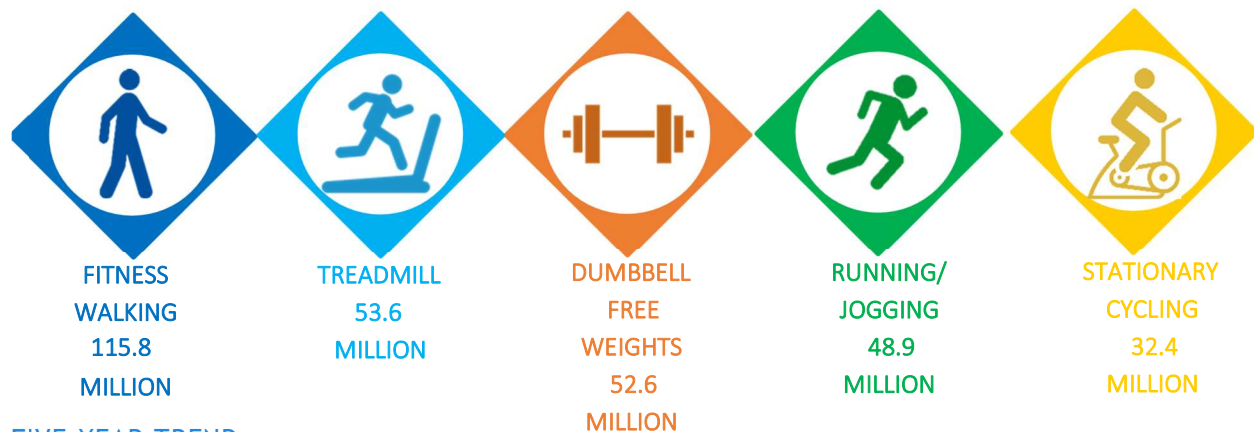
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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Figure 9: General Fitness Participatory Trends

1.2.4 NATIONAL TRENDS IN GENERAL FITNESS

PARTICIPATION LEVELS

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. The most popular general fitness activities in 2021 also were those that could be done at home or in a virtual class environment. The activities with the most participation was Fitness Walking (115.8 million), Treadmill (53.6 million), Free Weights (52.6 million), Running/Jogging (48.9 million), and Yoga (34.3 million).



FIVE-YEAR TREND

Over the last five years (2016-2021), the activities growing at the highest rate are Trail Running (45.9%), Yoga (30.8%), Dance, Step & Choreographed Exercise (13.3%), and Pilates Training (9.6%). Over the same time frame, the activities that have undergone the biggest decline include Group Stationary Cycling (33.5%), Traditional Triathlon (26.4%), Cardio Kickboxing (-26.1%), Cross-Training Style Workout (-24.4%) and Non-Traditional Triathlons (-23.5%).

ONE-YEAR TREND

In the last year, activities with the largest gains in participation were those that can be done alone at home or socially distanced outdoors. The top increases were in Treadmill (7.6%), Cross-Training Style Workouts (6.4%) Trail Running (5.6%), Yoga (4.7%), and Stair Climbing (4.7%). In the same span, the activities that had the largest decline in participation were those that would generally take more time and investment. The greatest drops were seen in Traditional Triathlon (-5.3%), Aerobics (-5.1%), Non-Traditional Triathlons (-4.3%), and Cardio Kickboxing (-3.7%). These trends may or may not continue the same way as more events (e.g. Triathlons) and indoor activities (Aerobics and Cardio Kickboxing) restart offerings as the pandemic numbers reduce in 2022.

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

The most participated in fitness activities all had increases in their casual user base (participating 1-49 times per year) over the last year. These fitness activities include Fitness Walking, Free Weights, Running/Jogging, Treadmills, Yoga, and Recumbent/Upright Stationary Cycling. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

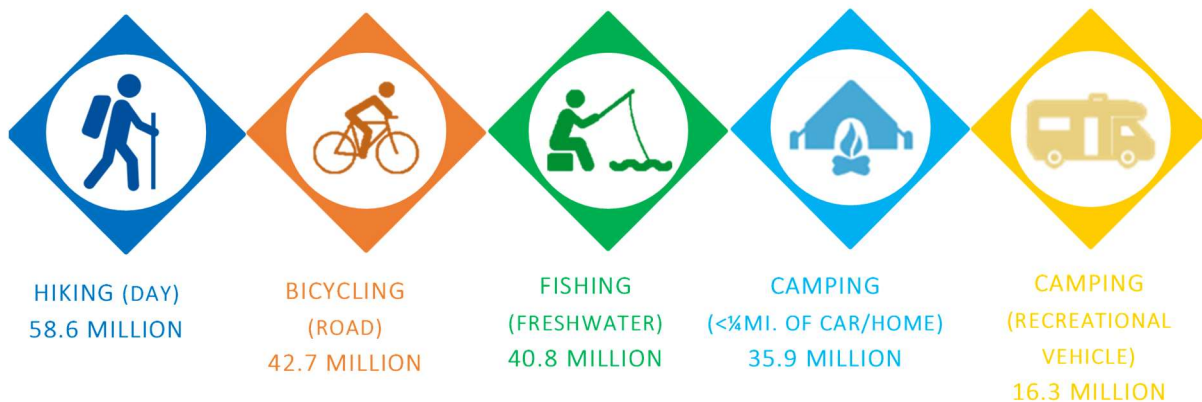
National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2016	2020	2021	5-Year Trend	1-Year Trend
Fitness Walking	107,895	114,044	115,814	7.3%	1.6%
Treadmill	51,872	49,832	53,627	3.4%	7.6%
Free Weights (Dumbbells/Hand Weights)	51,513	53,256	52,636	2.2%	-1.2%
Running/Jogging	47,384	50,652	48,977	3.4%	-3.3%
Stationary Cycling (Recumbent/Upright)	36,118	31,287	32,453	-10.1%	3.7%
Weight/Resistant Machines	35,768	30,651	30,577	-14.5%	-0.2%
Elliptical Motion Trainer	32,218	27,920	27,618	-14.3%	-1.1%
Yoga	26,268	32,808	34,347	30.8%	4.7%
Free Weights (Barbells)	26,473	28,790	28,243	6.7%	-1.9%
Dance, Step, & Choreographed Exercise	21,839	25,160	24,752	13.3%	-1.6%
Bodyweight Exercise	25,110	22,845	22,629	-9.9%	-0.9%
Aerobics (High Impact/Intensity Training HI)	10,575	10,954	10,400	-1.7%	-5.1%
Stair Climbing Machine	15,079	11,261	11,786	-21.8%	4.7%
Cross-Training Style Workout	12,914	9,179	9,764	-24.4%	6.4%
Trail Running	8,582	11,854	12,520	45.9%	5.6%
Stationary Cycling (Group)	8,937	6,054	5,939	-33.5%	-1.9%
Pilates Training	8,893	9,905	9,745	9.6%	-1.6%
Cardio Kickboxing	6,899	5,295	5,099	-26.1%	-3.7%
Boot Camp Style Cross-Training	6,583	4,969	5,169	-21.5%	4.0%
Martial Arts	5,745	6,064	6,186	7.7%	2.0%
Boxing for Fitness	5,175	5,230	5,237	1.2%	0.1%
Tai Chi	3,706	3,300	3,393	-8.4%	2.8%
Barre	3,329	3,579	3,659	9.9%	2.2%
Triathlon (Traditional/Road)	2,374	1,846	1,748	-26.4%	-5.3%
Triathlon (Non-Traditional/Off Road)	1,705	1,363	1,304	-23.5%	-4.3%
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 10 : National General Fitness Trends

1.2.5 NATIONAL TRENDS IN OUTDOOR RECREATION

PARTICIPATION LEVELS

Results from the SFIA report demonstrate strong growth in participation regarding outdoor/adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or with proper social distancing in a group, and are not as limited by time constraints. In 2020, the most popular activities, in terms of total participants, from the outdoor/adventure recreation category include: Day Hiking (57.8 million), Road Bicycling (44.5 million), Freshwater Fishing (42.6 million), Camping within ¼ mile of Vehicle/Home (36.1 million), and Recreational Vehicle Camping (17.8 million).



FIVE-YEAR TREND

From 2016-2021, Day Hiking (55.3%), BMX Bicycling (44.2%), Skateboarding (37.8%), Camping within ¼ mile of Vehicle/Home (30.1%), and Fly Fishing (27.3%) have undergone the largest increases in participation. The five-year trend also shows activities such as Adventure Racing (-31.4%), In-Line Roller Skating (-18.8%), Archery (-13.5%), and Traditional Climbing (-4.5%) to be the only activities with decreases in participation.

ONE-YEAR TREND

The one-year trend shows almost all activities growing in participation from the previous year. The most rapid growth being in Skateboarding (34.2%), Camping within ¼ mile of Vehicle/Home (28.0%), Birdwatching (18.8%), and Day Hiking (16.3%). Over the last year, the only activities that underwent decreases in participation were Adventure Racing (-8.3%) and Archery (-2.7%).

CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

A majority of outdoor activities have experienced participation growth in the last five- years. Although this a positive trend, it should be noted that all outdoor activities participation, besides adventure racing, consist primarily of casual users. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2016	2020	2021	5-Year Trend	1-Year Trend
Hiking (Day)	42,128	57,808	58,697	39.3%	1.5%
Bicycling (Road)	38,365	44,471	42,775	11.5%	-3.8%
Fishing (Freshwater)	38,121	42,556	40,853	7.2%	-4.0%
Camping (< 1/4 Mile of Vehicle/Home)	26,467	36,082	35,985	36.0%	-0.3%
Camping (Recreational Vehicle)	15,855	17,825	16,371	3.3%	-8.2%
Fishing (Saltwater)	12,266	14,527	13,790	12.4%	-5.1%
Birdwatching (>1/4 mile of Vehicle/Home)	11,589	15,228	14,815	27.8%	-2.7%
Backpacking Overnight	10,151	10,746	10,306	1.5%	-4.1%
Bicycling (Mountain)	8,615	8,998	8,693	0.9%	-3.4%
Archery	7,903	7,249	7,342	-7.1%	1.3%
Fishing (Fly)	6,456	7,753	7,458	15.5%	-3.8%
Skateboarding	6,442	8,872	8,747	35.8%	-1.4%
Climbing (Indoor)	-	5,535	5,684	N/A	2.7%
Roller Skating, In-Line	5,381	4,892	4,940	-8.2%	1.0%
Bicycling (BMX)	3,104	3,880	3,861	24.4%	-0.5%
Climbing (Traditional/Ice/Mountaineering)	2,790	2,456	2,374	-14.9%	-3.3%
Climbing (Sport/Boulder)	-	2,290	2,301	N/A	0.5%
Adventure Racing	2,999	1,966	1,826	-39.1%	-7.1%

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

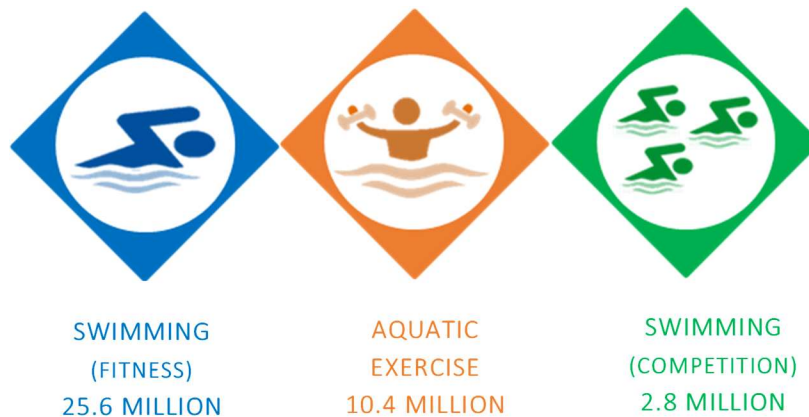
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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Figure 11: National Outdoor/Adventure Recreation Trends

1.2.6 NATIONAL TRENDS IN AQUATICS

PARTICIPATION LEVELS

Swimming is deemed as a lifetime activity, which is most likely why it continues to have such strong participation. In 2021, Fitness Swimming remained the overall leader in participation (25.6 million) amongst aquatic activities, even though most, if not all, aquatic facilities were forced to close at some point due to the COVID-19 pandemic.



FIVE-YEAR TREND

Assessing the five-year trend, no activity has experienced an increase from 2016-2021, most likely due to the lack of facility access during Covid-19. While Fitness Swimming and Aquatic Exercise underwent a slight decline, dropping -3.7% and -1.7% respectively, Competitive Swimming suffered a -16.2% decline in participation.

ONE-YEAR TREND

The impact of the COVID-19 pandemic is seen here as most aquatic facilities were forced to shut down for some part of the year. This caused decreases to Aquatic Exercise (-5.1%) having the largest decline, followed by Fitness Swimming (-0.2%). Participation in Competitive swimming increased by 8%.

CORE VS. CASUAL TRENDS IN AQUATICS

Only Aquatic Exercise has undergone an increase in casual participation (1-49 times per year) over the last five years, however, they have all seen a drop in core participation (50+ times per year) in the same time frame. This happened before the COVID-19 pandemic, and the large decreases in all participation over the last year have furthered this trend. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Aquatics					
Activity	Participation Levels			% Change	
	2016	2020	2021	5-Year Trend	1-Year Trend
Swimming (Fitness)	26,601	25,666	25,620	-3.7%	-0.2%
Aquatic Exercise	10,575	10,954	10,400	-1.7%	-5.1%
Swimming (Competition)	3,369	2,615	2,824	-16.2%	8.0%
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 12: National Aquatics Trends

1.2.7 NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

PARTICIPATION LEVEL

The most popular water sports / activities based on total participants in 2021 were Recreational Kayaking (13.3 million), Canoeing (9.2 million), and Snorkeling (7.3 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 a long winter season 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.

FIVE-YEAR TREND

Over the last five years, Recreational Kayaking (33.3%), Surfing (24%), and Stand-Up Paddling (16.1%) were the fastest growing water activities. White Water Kayaking (1.4%) was the only other activity with an increase in participation. From 2016-2021, activities declining in participation most rapidly were Boardsailing/Windsurfing (-25.3%), Scuba Diving (-20.4%), Water Skiing (-17.4%), Sea Kayaking (-17.2%) Snorkeling (-16.1%), and Sailing (-15.4%).

ONE-YEAR TREND

Recreational Kayaking (2.7%) and Stand-Up Paddling (1.7%) were the activities that grew over the last 5 years and in the last one year. Activities which experienced the largest decreases in participation in the most recent year include Surfing (-8.9%), Snorkeling (-5.3%), Scuba Diving (-4.3%), and Canoeing (-4.1%).

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 drastically more casual participants than core participants, since frequencies of activities may be constrained by external factors. These high casual user numbers are likely why most water sports/activities have experienced decreases in participation in recent years. *Please see Appendix A for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Water Sports / Activities					
Activity	Participation Levels			% Change	
	2016	2020	2021	5-Year Trend	1-Year Trend
Kayaking (Recreational)	10,017	13,002	13,351	33.3%	2.7%
Canoeing	10,046	9,595	9,199	-8.4%	-4.1%
Snorkeling	8,717	7,729	7,316	-16.1%	-5.3%
Jet Skiing	5,783	4,900	5,062	-12.5%	3.3%
Sailing	4,095	3,486	3,463	-15.4%	-0.7%
Stand-Up Paddling	3,220	3,675	3,739	16.1%	1.7%
Rafting	3,428	3,474	3,383	-1.3%	-2.6%
Water Skiing	3,700	3,050	3,058	-17.4%	0.3%
Surfing	2,793	3,800	3,463	24.0%	-8.9%
Wakeboarding	2,912	2,754	2,674	-8.2%	-2.9%
Scuba Diving	3,111	2,588	2,476	-20.4%	-4.3%
Kayaking (Sea/Touring)	3,124	2,508	2,587	-17.2%	3.1%
Kayaking (White Water)	2,552	2,605	2,587	1.4%	-0.7%
Boardsailing/Windsurfing	1,737	1,268	1,297	-25.3%	2.3%
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: National Water Sports / Activities Trends

1.3.1 LOCAL SPORT AND LEISURE MARKET POTENTIAL

The following charts show sport and leisure market potential data for Oregon City residents, as provided by ESRI. Market Potential Index (MPI) measures the probable demand for a product or service within the defined service areas. The MPI shows the likelihood that an adult resident will participate in certain activities when compared to the U.S. average. These activities do not have to be undertaken within the Oregon City boundaries alone.

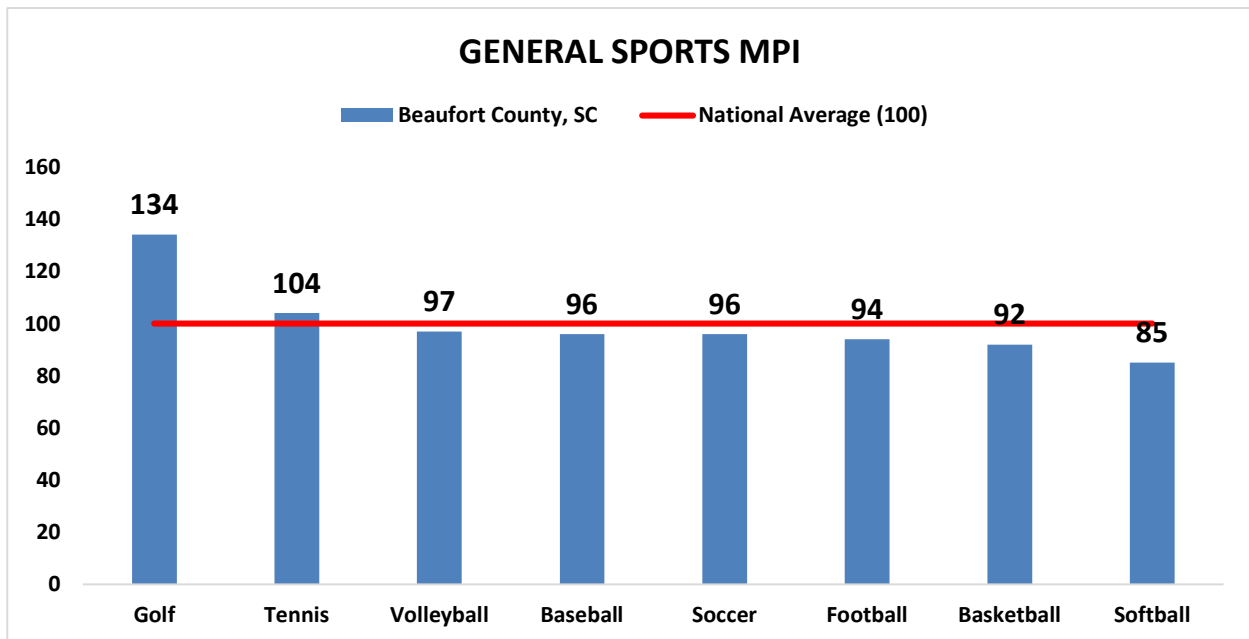
The national average is 100; therefore, numbers below 100 would represent lower than average participation rates, and numbers above 100 would represent higher than average participation rates. The service area is compared to the national average in four (4) categories - general sports, fitness, outdoor activity, and commercial recreation.

It should be noted that MPI metrics are only one data point used to help determine community trends; thus, programmatic decisions should not be based solely on MPI metrics.

The following charts compare MPI scores for 46 sport and leisure activities. The activities are categorized by activity type and listed in descending order, from highest to lowest MPI score. High index numbers (100+) are significant because they demonstrate that there is a greater likelihood that residents within the service areas will actively participate in those offerings provided by the Department.

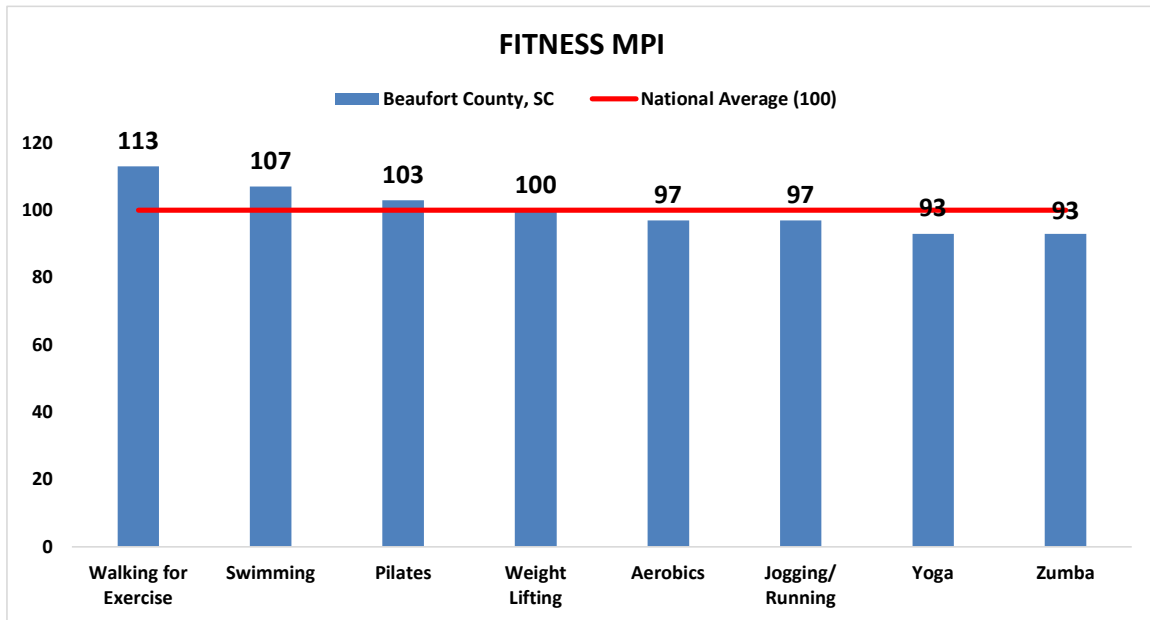
GENERAL SPORTS MARKET POTENTIAL

The General Sports category shows that County residents have an above average potential to participate in Golf (134) and Tennis (104).



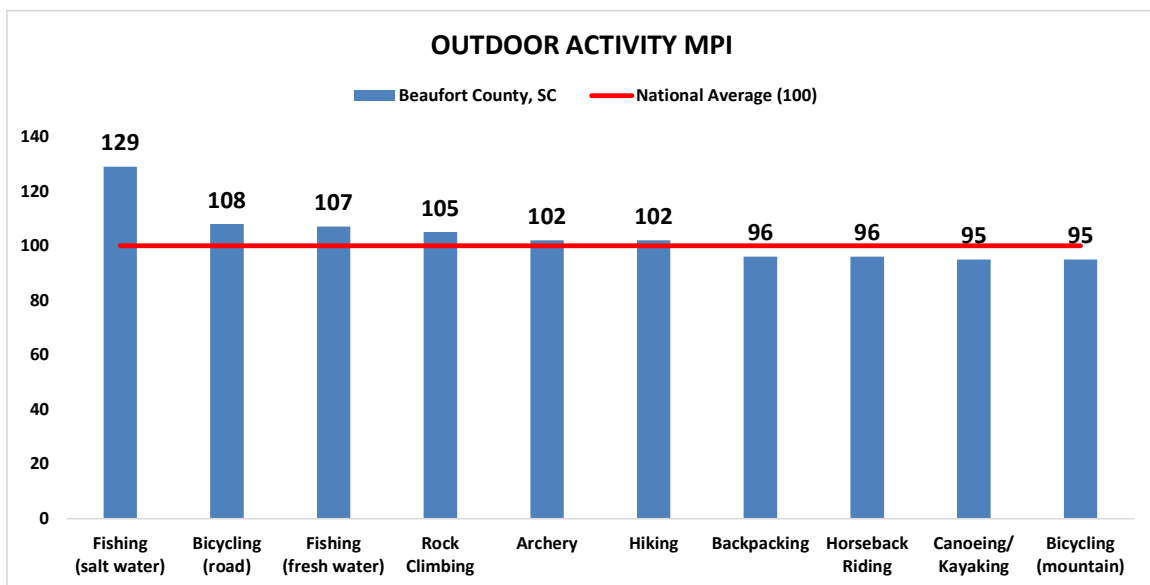
FITNESS MARKET POTENTIAL

Assessing MPI scores for the Fitness Activity category reveals that overall County residents are most likely to participate in activities/programs pertaining to Walking for Exercise (113), Swimming (107), and Pilates (103), when compared to the national average.



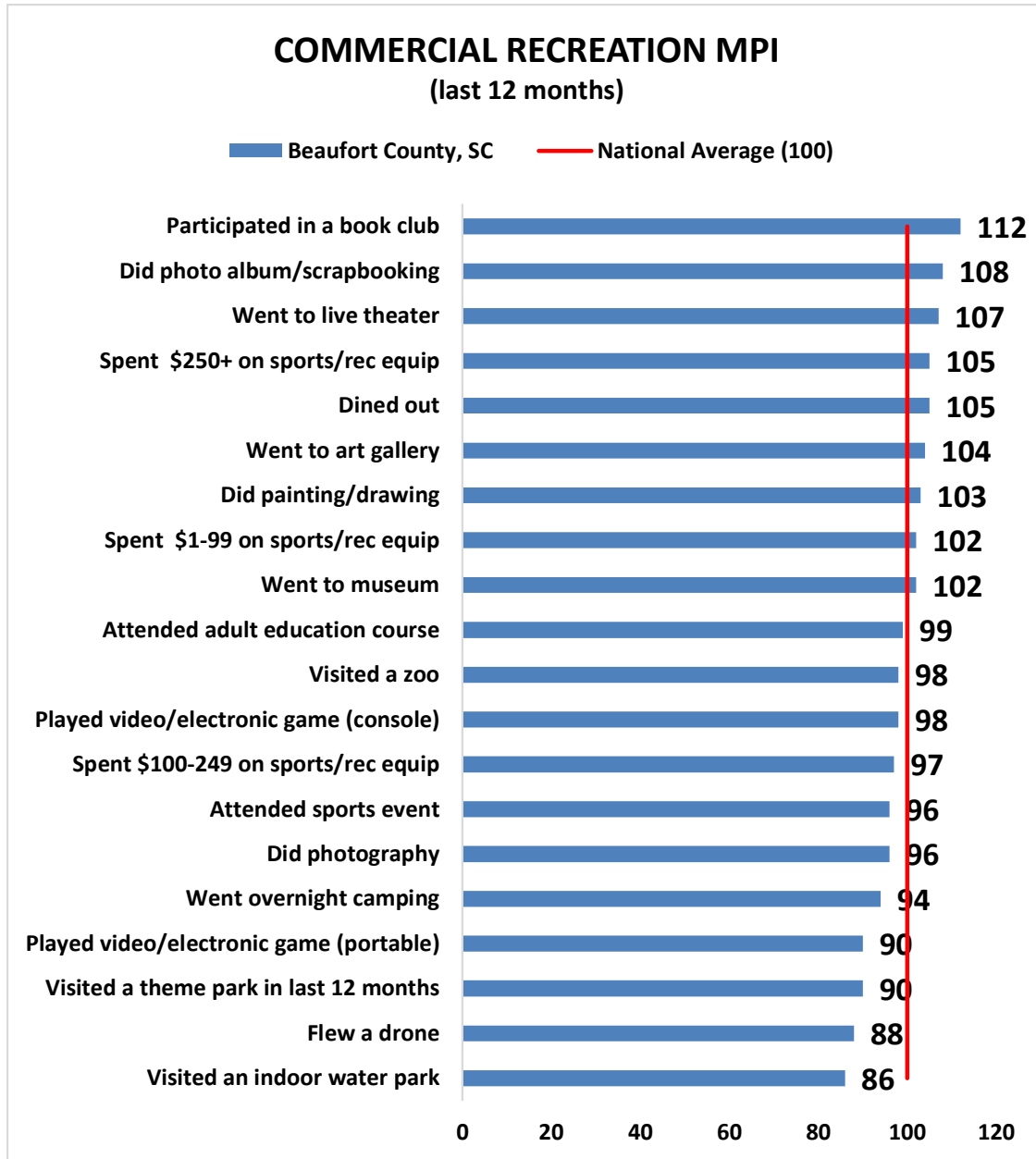
OUTDOOR ACTIVITY MARKET POTENTIAL

Overall, the Outdoor Activity MPI chart reflects some of the highest MPI scores amongst the four assessed categories, with Salt Water Fishing (129), Road Bicycling (108), Fresh Water Fishing (107), Rock Climbing (105), Archery (102) and Hiking (102) all scoring above the national average (100).



COMMERCIAL RECREATION MARKET POTENTIAL

The Commercial Recreation category reveals multiple activities having MPI scores above the national average that the Department could program towards including: ‘Participated in a book club’ (112), ‘Did photo album/scrapbooking’ (107), ‘Went to live theater’ (107), ‘Went to art gallery’ (104), and ‘Did painting/drawing’ (103).



APPENDIX A- CORE VS. CASUAL PARTICIPATION TRENDS

GENERAL SPORTS

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
#	%	#	%	#	%			
Basketball	23,410	100%	24,917	100%	27,753	100%	18.6%	11.4%
<i>Casual (1-12 times)</i>	7,774	33%	9,669	39%	11,962	43%	53.9%	23.7%
<i>Core(13+ times)</i>	15,636	67%	15,248	61%	15,791	57%	1.0%	3.6%
Golf (9 or 18-Hole Course)	24,120	100%	24,271	100%	24,804	100%	2.8%	2.2%
Tennis	17,963	100%	17,684	100%	21,642	100%	20.5%	22.4%
Baseball	13,711	100%	15,804	100%	15,731	100%	14.7%	-0.5%
<i>Casual (1-12 times)</i>	4,803	35%	6,655	42%	8,089	51%	68.4%	21.5%
<i>Core (13+ times)</i>	8,908	65%	9,149	58%	7,643	49%	-14.2%	-16.5%
Soccer (Outdoor)	12,646	100%	11,913	100%	12,444	100%	-1.6%	4.5%
<i>Casual (1-25 times)</i>	6,698	53%	6,864	58%	8,360	67%	24.8%	21.8%
<i>Core (26+ times)</i>	5,949	47%	5,050	42%	4,084	33%	-31.3%	-19.1%
Football (Flag)	5,829	100%	6,783	100%	7,001	100%	20.1%	3.2%
<i>Casual (1-12 times)</i>	3,105	53%	3,794	56%	4,287	61%	38.1%	13.0%
<i>Core(13+ times)</i>	2,724	47%	2,989	44%	2,714	39%	-0.4%	-9.2%
<i>Core Age 6 to 17 (13+ times)</i>	1,276	53%	1,590	56%	1,446	61%	13.3%	-9.1%
Softball (Slow Pitch)	7,114	100%	7,071	100%	6,349	100%	-10.8%	-10.2%
<i>Casual (1-12 times)</i>	3,004	42%	3,023	43%	2,753	43%	-8.4%	-8.9%
<i>Core(13+ times)</i>	4,110	58%	4,048	57%	3,596	57%	-12.5%	-11.2%
Badminton	7,198	100%	6,095	100%	5,862	100%	-18.6%	-3.8%
<i>Casual (1-12 times)</i>	5,032	70%	4,338	71%	4,129	70%	-17.9%	-4.8%
<i>Core(13+ times)</i>	2,166	30%	1,756	29%	1,733	30%	-20.0%	-1.3%
Soccer (Indoor)	4,813	100%	5,336	100%	5,440	100%	13.0%	1.9%
<i>Casual (1-12 times)</i>	2,157	45%	2,581	48%	3,377	62%	56.6%	30.8%
<i>Core(13+ times)</i>	2,656	55%	2,755	52%	2,063	38%	-22.3%	-25.1%
Volleyball (Court)	6,423	100%	6,487	100%	5,410	100%	-15.8%	-16.6%
<i>Casual (1-12 times)</i>	2,849	44%	2,962	46%	2,204	41%	-22.6%	-25.6%
<i>Core(13+ times)</i>	3,575	56%	3,525	54%	3,206	59%	-10.3%	-9.0%
Football (Tackle)	6,222	100%	5,107	100%	5,054	100%	-18.8%	-1.0%
<i>Casual (1-25 times)</i>	2,842	46%	2,413	47%	2,390	47%	-15.9%	-1.0%
<i>Core(26+ times)</i>	3,380	54%	2,694	53%	2,665	53%	-21.2%	-1.1%
<i>Core Age 6 to 17 (26+ times)</i>	2,539	46%	2,311	47%	2,226	47%	-12.3%	-3.7%
Football (Touch)	6,487	100%	5,171	100%	4,846	100%	-25.3%	-6.3%
<i>Casual (1-12 times)</i>	3,809	59%	3,065	59%	2,990	62%	-21.5%	-2.4%
<i>Core(13+ times)</i>	2,678	41%	2,105	41%	1,856	38%	-30.7%	-11.8%
Volleyball (Sand/Beach)	4,785	100%	4,400	100%	4,320	100%	-9.7%	-1.8%
<i>Casual (1-12 times)</i>	3,348	70%	2,907	66%	3,105	72%	-7.3%	6.8%
<i>Core(13+ times)</i>	1,438	30%	1,493	34%	1,215	28%	-15.5%	-18.6%

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 SPORTS (CONTINUED)

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Pickleball	2,506	100%	3,460	100%	4,199	100%	67.6%	21.4%
<i>Casual (1-12 times)</i>	2,628	105%	2,207	64%	2,835	68%	7.9%	28.5%
<i>Core(13+ times)</i>	1,048	-5%	1,253	36%	1,364	32%	30.2%	8.9%
Gymnastics	4,679	100%	4,669	100%	3,848	100%	-17.8%	-17.6%
<i>Casual (1-49 times)</i>	3,061	65%	3,004	64%	2,438	63%	-20.4%	-18.8%
<i>Core(50+ times)</i>	1,618	35%	1,695	36%	1,410	37%	-12.9%	-16.8%
Track and Field	4,222	100%	4,139	100%	3,636	100%	-13.9%	-12.2%
<i>Casual (1-25 times)</i>	1,973	47%	2,069	50%	1,589	44%	-19.5%	-23.2%
<i>Core(26+ times)</i>	2,249	53%	2,070	50%	2,046	56%	-9.0%	-1.2%
Racquetball	3,883	100%	3,453	100%	3,426	100%	-11.8%	-0.8%
<i>Casual (1-12 times)</i>	2,628	68%	2,398	69%	2,476	72%	-5.8%	3.3%
<i>Core(13+ times)</i>	1,255	32%	1,055	31%	950	28%	-24.3%	-10.0%
Cheerleading	3,608	100%	3,752	100%	3,308	100%	-8.3%	-11.8%
<i>Casual (1-25 times)</i>	1,968	55%	1,934	52%	1,931	58%	-1.9%	-0.2%
<i>Core(26+ times)</i>	1,640	45%	1,817	48%	1,377	42%	-16.0%	-24.2%
Ultimate Frisbee	4,409	100%	2,290	100%	2,325	100%	-47.3%	1.5%
<i>Casual (1-12 times)</i>	3,371	76%	1,491	65%	1,476	63%	-56.2%	-1.0%
<i>Core(13+ times)</i>	1,038	24%	799	35%	849	37%	-18.2%	6.3%
Ice Hockey	2,546	100%	2,357	100%	2,270	100%	-10.8%	-3.7%
<i>Casual (1-12 times)</i>	1,219	48%	1,040	44%	1,165	51%	-4.4%	12.0%
<i>Core(13+ times)</i>	1,326	52%	1,317	56%	1,105	49%	-16.7%	-16.1%
Wrestling	1,978	100%	1,944	100%	1,931	100%	-2.4%	-0.7%
<i>Casual (1-25 times)</i>	1,094	55%	1,189	61%	1,239	64%	13.3%	4.2%
<i>Core(26+ times)</i>	885	45%	755	39%	692	36%	-21.8%	-8.3%
Lacrosse	2,094	100%	2,115	100%	1,884	100%	-10.0%	-10.9%
<i>Casual (1-12 times)</i>	1,146	55%	1,021	48%	902	48%	-21.3%	-11.7%
<i>Core(13+ times)</i>	947	45%	1,094	52%	982	52%	3.7%	-10.2%
Softball (Fast Pitch)	2,460	100%	2,242	100%	1,811	100%	-26.4%	-19.2%
<i>Casual (1-25 times)</i>	1,187	48%	993	44%	650	36%	-45.2%	-34.5%
<i>Core(26+ times)</i>	1,273	52%	1,250	56%	1,162	64%	-8.7%	-7.0%
Roller Hockey	1,907	100%	1,616	100%	1,500	100%	-21.3%	-7.2%
<i>Casual (1-12 times)</i>	1,382	72%	1,179	73%	1,129	75%	-18.3%	-4.2%
<i>Core(13+ times)</i>	525	28%	436	27%	371	25%	-29.3%	-14.9%
Rugby	1,349	100%	1,392	100%	1,242	100%	-7.9%	-10.8%
<i>Casual (1-7 times)</i>	918	68%	835	60%	807	65%	-12.1%	-3.4%
<i>Core(8+ times)</i>	431	32%	557	40%	435	35%	0.9%	-21.9%
Squash	1,710	100%	1,222	100%	1,163	100%	-32.0%	-4.8%
<i>Casual (1-7 times)</i>	1,293	76%	747	61%	669	58%	-48.3%	-10.4%
<i>Core(8+ times)</i>	417	24%	476	39%	495	42%	18.7%	4.0%

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%)

PARKS AND RECREATION MASTER PLAN: DEMOGRAPHIC & TRENDS ANALYSIS

GENERAL FITNESS

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Fitness Walking	109,829	100%	111,439	100%	114,044	100%	3.8%	2.3%
<i>Casual (1-49 times)</i>	35,563	32%	36,254	33%	34,742	30%	-2.3%	-4.2%
<i>Core(50+ times)</i>	74,266	68%	75,185	67%	79,302	70%	6.8%	5.5%
Free Weights (Dumbbells/Hand Weights)	54,716	100%	51,450	100%	53,256	100%	-2.7%	3.5%
<i>Casual (1-49 times)</i>	18,491	34%	19,762	38%	20,070	38%	8.5%	1.6%
<i>Core(50+ times)</i>	36,225	66%	31,688	62%	33,186	62%	-8.4%	4.7%
Running/Jogging	48,496	100%	50,052	100%	50,652	100%	4.4%	1.2%
<i>Casual (1-49 times)</i>	22,337	46%	24,972	50%	24,438	48%	9.4%	-2.1%
<i>Core(50+ times)</i>	26,158	54%	25,081	50%	26,214	52%	0.2%	4.5%
Treadmill	50,398	100%	56,823	100%	49,832	100%	-1.1%	-12.3%
<i>Casual (1-49 times)</i>	23,136	46%	28,473	50%	19,549	39%	-15.5%	-31.3%
<i>Core(50+ times)</i>	27,262	54%	28,349	50%	30,283	61%	11.1%	6.8%
Yoga	25,289	100%	30,456	100%	32,808	100%	29.7%	7.7%
<i>Casual (1-49 times)</i>	14,947	59%	18,953	62%	19,337	59%	29.4%	2.0%
<i>Core(50+ times)</i>	10,341	41%	11,503	38%	13,471	41%	30.3%	17.1%
Stationary Cycling (Recumbent/Upright)	35,553	100%	37,085	100%	31,287	100%	-12.0%	-15.6%
<i>Casual (1-49 times)</i>	18,512	52%	19,451	52%	13,249	42%	-28.4%	-31.9%
<i>Core(50+ times)</i>	17,042	48%	17,634	48%	18,038	58%	5.8%	2.3%
Weight/Resistant Machines	35,310	100%	36,181	100%	30,651	100%	-13.2%	-15.3%
<i>Casual (1-49 times)</i>	14,654	42%	14,668	41%	10,940	36%	-25.3%	-25.4%
<i>Core(50+ times)</i>	20,655	58%	21,513	59%	19,711	64%	-4.6%	-8.4%
Free Weights (Barbells)	25,381	100%	28,379	100%	28,790	100%	13.4%	1.4%
<i>Casual (1-49 times)</i>	9,860	39%	11,806	42%	13,428	47%	36.2%	13.7%
<i>Core(50+ times)</i>	15,521	61%	16,573	58%	15,363	53%	-1.0%	-7.3%
Elliptical Motion/Cross Trainer	32,321	100%	33,056	100%	27,920	100%	-13.6%	-15.5%
<i>Casual (1-49 times)</i>	15,729	49%	17,175	52%	14,403	52%	-8.4%	-16.1%
<i>Core(50+ times)</i>	16,593	51%	15,880	48%	13,517	48%	-18.5%	-14.9%
Dance, Step, Choreographed Exercise	21,487	100%	23,957	100%	25,160	100%	17.1%	5.0%
<i>Casual (1-49 times)</i>	14,137	66%	16,047	67%	16,652	66%	17.8%	3.8%
<i>Core(50+ times)</i>	7,350	34%	7,910	33%	8,507	34%	15.7%	7.5%
Bodyweight Exercise	22,146	100%	23,504	100%	22,845	100%	3.2%	-2.8%
<i>Casual (1-49 times)</i>	9,346	42%	9,492	40%	9,581	42%	2.5%	0.9%
<i>Core(50+ times)</i>	12,800	58%	14,012	60%	13,264	58%	3.6%	-5.3%

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 (CONTINUED)

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Aerobics (High Impact/ Intensity Training)	20,464	100%	22,044	100%	22,487	100%	9.9%	2.0%
<i>Casual (1-49 times)</i>	11,723	57%	12,380	56%	12,743	57%	8.7%	2.9%
<i>Core(50+ times)</i>	8,742	43%	9,665	44%	9,744	43%	11.5%	0.8%
Trail Running	8,139	100%	10,997	100%	11,854	100%	45.6%	7.8%
Stair-Climbing Machine	13,234	100%	15,359	100%	11,261	100%	-14.9%	-26.7%
<i>Casual (1-49 times)</i>	7,960	60%	10,059	65%	6,339	56%	-20.4%	-37.0%
<i>Core(50+ times)</i>	5,275	40%	5,301	35%	4,922	44%	-6.7%	-7.1%
Pilates Training	8,594	100%	9,243	100%	9,905	100%	15.3%	7.2%
<i>Casual (1-49 times)</i>	5,201	61%	6,074	66%	6,668	67%	28.2%	9.8%
<i>Core(50+ times)</i>	3,394	39%	3,168	34%	3,237	33%	-4.6%	2.2%
Cross-Training Style Workout	11,710	100%	13,542	100%	9,179	100%	-21.6%	-32.2%
<i>Casual (1-49 times)</i>	6,038	52%	7,100	52%	3,476	38%	-42.4%	-51.0%
<i>Core(50+ times)</i>	5,672	48%	6,442	48%	5,704	62%	0.6%	-11.5%
Martial Arts	5,507	100%	6,068	100%	6,064	100%	10.1%	-0.1%
<i>Casual (1-12 times)</i>	1,793	33%	2,178	36%	2,679	44%	49.4%	23.0%
<i>Core(13+ times)</i>	3,714	67%	3,890	64%	3,385	56%	-8.9%	-13.0%
Stationary Cycling (Group)	8,677	100%	9,930	100%	6,054	100%	-30.2%	-39.0%
<i>Casual (1-49 times)</i>	5,561	64%	6,583	66%	3,134	52%	-43.6%	-52.4%
<i>Core(50+ times)</i>	3,116	36%	3,347	34%	2,920	48%	-6.3%	-12.8%
Cardio Kickboxing	6,708	100%	7,026	100%	5,295	100%	-21.1%	-24.6%
<i>Casual (1-49 times)</i>	4,579	68%	4,990	71%	3,438	65%	-24.9%	-31.1%
<i>Core(50+ times)</i>	2,129	32%	2,037	29%	1,857	35%	-12.8%	-8.8%
Boxing for Fitness	5,419	100%	5,198	100%	5,230	100%	-3.5%	0.6%
<i>Casual (1-12 times)</i>	2,787	51%	2,738	53%	2,962	57%	6.3%	8.2%
<i>Core(13+ times)</i>	2,633	49%	2,460	47%	2,268	43%	-13.9%	-7.8%
Boot Camp Style Training	6,722	100%	6,830	100%	4,969	100%	-26.1%	-27.2%
<i>Casual (1-49 times)</i>	4,488	67%	4,951	72%	3,204	64%	-28.6%	-35.3%
<i>Core(50+ times)</i>	2,234	33%	1,880	28%	1,765	36%	-21.0%	-6.1%
Tai Chi	3,651	100%	3,793	100%	3,300	100%	-9.6%	-13.0%
<i>Casual (1-49 times)</i>	2,237	61%	2,379	63%	1,858	56%	-16.9%	-21.9%
<i>Core(50+ times)</i>	1,415	39%	1,414	37%	1,442	44%	1.9%	2.0%
Barre	3,583	100%	3,665	100%	3,579	100%	-0.1%	-2.3%
<i>Casual (1-49 times)</i>	2,881	80%	2,868	78%	2,721	76%	-5.6%	-5.1%
<i>Core(50+ times)</i>	703	20%	797	22%	858	24%	22.0%	7.7%
Triathlon (Traditional/Road)	2,498	100%	2,001	100%	1,846	100%	-26.1%	-7.7%
Triathlon (Non-Traditional/Off Road)	1,744	100%	1,472	100%	1,363	100%	-21.8%	-7.4%

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%)

OUTDOOR/ADVENTURE RECREATION

National Core vs Casual Participatory Trends - Outdoor / Adventure Recreation								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Hiking (Day)	37,232	100%	49,697	100%	57,808	100%	55.3%	16.3%
Bicycling (Road)	38,280	100%	39,388	100%	44,471	100%	16.2%	12.9%
<i>Casual (1-25 times)</i>	18,845	49%	20,796	53%	23,720	53%	25.9%	14.1%
<i>Core(26+ times)</i>	19,435	51%	18,592	47%	20,751	47%	6.8%	11.6%
Fishing (Freshwater)	37,682	100%	39,185	100%	42,556	100%	12.9%	8.6%
<i>Casual (1-7 times)</i>	20,206	54%	20,857	53%	24,309	57%	20.3%	16.6%
<i>Core(8+ times)</i>	17,476	46%	18,328	47%	18,247	43%	4.4%	-0.4%
Camping (< 1/4 Mile of Vehicle/Home)	27,742	100%	28,183	100%	36,082	100%	30.1%	28.0%
Camping (Recreational Vehicle)	14,699	100%	15,426	100%	17,825	100%	21.3%	15.6%
<i>Casual (1-7 times)</i>	7,843	53%	8,420	55%	11,281	63%	43.8%	34.0%
<i>Core(8+ times)</i>	6,856	47%	7,006	45%	6,544	37%	-4.6%	-6.6%
Fishing (Saltwater)	11,975	100%	13,193	100%	14,527	100%	21.3%	10.1%
<i>Casual (1-7 times)</i>	6,971	58%	7,947	60%	9,109	63%	30.7%	14.6%
<i>Core(8+ times)</i>	5,004	42%	5,246	40%	5,418	37%	8.3%	3.3%
Birdwatching (>1/4 mile of Vehicle/Home)	13,093	100%	12,817	100%	15,228	100%	16.3%	18.8%
Backpacking Overnight	10,100	100%	10,660	100%	10,746	100%	6.4%	0.8%
Bicycling (Mountain)	8,316	100%	8,622	100%	8,998	100%	8.2%	4.4%
<i>Casual (1-12 times)</i>	3,862	46%	4,319	50%	4,803	53%	24.4%	11.2%
<i>Core(13+ times)</i>	4,454	54%	4,302	50%	4,194	47%	-5.8%	-2.5%
Skateboarding	6,436	100%	6,610	100%	8,872	100%	37.8%	34.2%
<i>Casual (1-25 times)</i>	3,867	60%	4,265	65%	6,315	71%	63.3%	48.1%
<i>Core(26+ times)</i>	2,569	40%	2,345	35%	2,557	29%	-0.5%	9.0%
Fishing (Fly)	6,089	100%	7,014	100%	7,753	100%	27.3%	10.5%
<i>Casual (1-7 times)</i>	3,843	63%	4,493	64%	5,020	65%	30.6%	11.7%
<i>Core(8+ times)</i>	2,246	37%	2,521	36%	2,733	35%	21.7%	8.4%
Archery	8,378	100%	7,449	100%	7,249	100%	-13.5%	-2.7%
<i>Casual (1-25 times)</i>	7,038	84%	6,309	85%	6,102	84%	-13.3%	-3.3%
<i>Core(26+ times)</i>	1,340	16%	1,140	15%	1,147	16%	-14.4%	0.6%
Climbing (Indoor)		n/a	5,309	100%	5,535	100%	n/a	4.3%
Roller Skating (In-Line)	6,024	100%	4,816	100%	4,892	100%	-18.8%	1.6%
<i>Casual (1-12 times)</i>	4,246	70%	3,474	72%	3,466	71%	-18.4%	-0.2%
<i>Core(13+ times)</i>	1,778	30%	1,342	28%	1,425	29%	-19.9%	6.2%
Bicycling (BMX)	2,690	100%	3,648	100%	3,880	100%	44.2%	6.4%
<i>Casual (1-12 times)</i>	1,457	54%	2,257	62%	2,532	65%	73.8%	12.2%
<i>Core(13+ times)</i>	1,233	46%	1,392	38%	1,348	35%	9.3%	-3.2%
Climbing (Traditional/Ice/Mountaineering)	2,571	100%	2,400	100%	2,456	100%	-4.5%	2.3%
Climbing (Sport/Boulder)		n/a	2,183	100%	2,290	100%	n/a	4.9%
Adventure Racing	2,864	100%	2,143	100%	1,966	100%	-31.4%	-8.3%
<i>Casual (1 times)</i>	1,121	39%	549	26%	328	17%	-70.7%	-40.3%
<i>Core(2+ times)</i>	1,743	61%	1,595	74%	1,638	83%	-6.0%	2.7%

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 P 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	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Swimming (Fitness)	26,319	100%	28,219	100%	25,666	100%	-2.5%	-9.0%
<i>Casual (1-49 times)</i>	17,059	65%	19,480	69%	17,987	70%	5.4%	-7.7%
<i>Core(50+ times)</i>	9,260	35%	8,739	31%	7,680	30%	-17.1%	-12.1%
Aquatic Exercise	9,226	100%	11,189	100%	10,954	100%	18.7%	-2.1%
<i>Casual (1-49 times)</i>	5,991	65%	8,006	72%	8,331	76%	39.1%	4.1%
<i>Core(50+ times)</i>	3,236	35%	3,183	28%	2,623	24%	-18.9%	-17.6%
Swimming (Competition)	2,892	100%	2,822	100%	2,615	100%	-9.6%	-7.3%
<i>Casual (1-49 times)</i>	1,482	51%	1,529	54%	1,524	58%	2.8%	-0.3%
<i>Core(50+ times)</i>	1,411	49%	1,293	46%	1,091	42%	-22.7%	-15.6%
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%)	

WATER SPORTS/ACTIVITIES

National Core vs Casual Participatory Trends - Water Sports / Activities								
Activity	Participation Levels						% Change	
	2015		2019		2020		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Kayaking (Recreational)	9,499	100%	11,382	100%	13,002	100%	36.9%	14.2%
Canoeing	10,236	100%	8,995	100%	9,595	100%	-6.3%	6.7%
Snorkeling	8,874	100%	7,659	100%	7,729	100%	-12.9%	0.9%
<i>Casual (1-7 times)</i>	7,002	79%	6,192	81%	6,374	82%	-9.0%	2.9%
<i>Core(8+ times)</i>	1,872	21%	1,468	19%	1,355	18%	-27.6%	-7.7%
Jet Skiing	6,263	100%	5,108	100%	4,900	100%	-21.8%	-4.1%
<i>Casual (1-7 times)</i>	4,425	71%	3,684	72%	3,783	77%	-14.5%	2.7%
<i>Core(8+ times)</i>	1,838	29%	1,423	28%	1,116	23%	-39.3%	-21.6%
Surfing	2,701	100%	2,964	100%	3,800	100%	40.7%	28.2%
<i>Casual (1-7 times)</i>	1,665	62%	2,001	68%	2,507	66%	50.6%	25.3%
<i>Core(8+ times)</i>	1,036	38%	962	32%	747	34%	-27.9%	-22.3%
Stand Up Paddling	3,020	100%	3,562	100%	3,675	100%	21.7%	3.2%
Sailing	4,099	100%	3,618	100%	3,486	100%	-15.0%	-3.6%
<i>Casual (1-7 times)</i>	2,818	69%	2,477	68%	2,395	69%	-15.0%	-3.3%
<i>Core(8+ times)</i>	1,281	31%	1,141	32%	1,091	31%	-14.8%	-4.4%
Rafting	3,883	100%	3,438	100%	3,474	100%	-10.5%	1.0%
Water Skiing	3,948	100%	3,203	100%	3,050	100%	-22.7%	-4.8%
<i>Casual (1-7 times)</i>	2,835	72%	2,355	74%	2,189	72%	-22.8%	-7.0%
<i>Core(8+ times)</i>	1,112	28%	847	26%	861	28%	-22.6%	1.7%
Wakeboarding	3,226	100%	2,729	100%	2,754	100%	-14.6%	0.9%
<i>Casual (1-7 times)</i>	2,308	72%	1,839	67%	2,007	73%	-13.0%	9.1%
<i>Core(8+ times)</i>	918	28%	890	33%	747	27%	-18.6%	-16.1%
Kayaking (White Water)	2,518	100%	2,583	100%	2,605	100%	3.5%	0.9%
Scuba Diving	3,274	100%	3,715	100%	2,588	100%	-21.0%	-30.3%
<i>Casual (1-7 times)</i>	2,405	73%	2,016	54%	1,880	73%	-21.8%	-6.7%
<i>Core(8+ times)</i>	869	27%	699	46%	708	27%	-18.5%	1.3%
Kayaking (Sea/Touring)	3,079	100%	2,652	100%	2,508	100%	-18.5%	-5.4%
Boardsailing/Windsurfing	1,766	100%	1,405	100%	1,268	100%	-28.2%	-9.8%
<i>Casual (1-7 times)</i>	1,461	83%	1,112	79%	1,015	80%	-30.5%	-8.7%
<i>Core(8+ times)</i>	305	17%	292	21%	253	20%	-17.0%	-13.4%
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%)	