

Section 1 – Demographic Analysis

The Market and Demographic Analysis provides a clear understanding of the market size, economic factors and trends that would help determine the potential client base within the target market area.

1.1 Methodology

Data used was the most current and was obtained from the U.S. Census Bureau's 2005 American Community Survey.

1.2 Tempe, Arizona

Tempe is the most densely populated city in the State of Arizona; consisting of slightly more than forty square miles of landlocked area, 4,133.61 of Tempe's residents reside on every square mile of land. Based on the 2005 Census estimate, the current population is 166,171 – something that will surely be eclipsed upon completion of numerous development projects slated for the area which has seen a surge in development projects over the last twenty months leading to more than one billion dollars in construction. As of January 1, 2007, thirty-one of the forty-three approved development projects are currently in at least the design and development phase; of those, twenty-three have been permitted, and eighteen are under construction or completed.

Population categorization by age segment demonstrates the relative youth of the City (see **Figure 1**); the largest single age segment is comprised of those between the ages of twenty-five and thirty-four (17.7% of the total population), while the under-five age segment is nearly as large as all of those aged sixty-five and above. Currently, the four oldest age segments (all of those aged fifty-five and above) are also the smallest age segments. Analyzing ages by major age segment presents the same scenario – the baby boomers are a very small minority (14.0%); in contrast, those aged fifty-five and above total nearly one quarter (22.5%) of the total U.S. population. This population composition lends itself to a very wide range of recreational, educational, and entertainment options and implies relatively large demands for active recreation programs and services targeted at youth, adolescent, and adults.

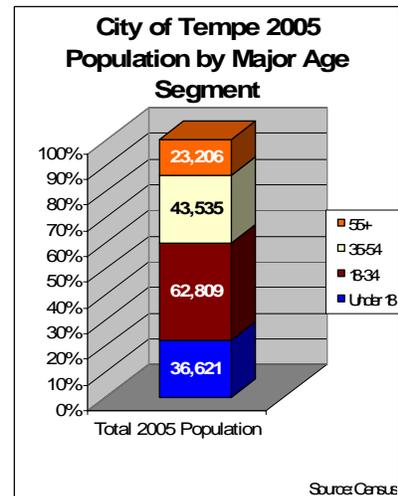


Figure 1 - Population by Major Age Segment

Gender

Gender distribution is nearly equal; males consist of slightly more than half (51.1%) of the total population. Sixty-five percent of Americans say they participate in a sport or recreation of some kind; sixty-one percent of women participate and sixty-nine percent of men say they participate. The top ten recreational activities for women are walking, aerobics, general exercising, biking, jogging, basketball, lifting weights, golf, swimming and tennis. The top ten recreational activities for men are golf, basketball, walking,

jogging, biking, lifting weights, football, hiking, fishing and hunting. By comparison, in 1990, fishing, hunting, and golf were mentioned by men as most often done sport activities while women mentioned swimming, walking and golf. Based on current participation trends, men and women shared a desire for six of the top ten recreational activities; in any ninety-day span, men claim to participate in their favorite activities an average of sixty-five times and women a total of fifty-seven times. With more women participating in recreational activities further into adulthood, more are opting for less team oriented activities that dominate the female youth recreation environment and shifting more towards a diverse selection of individual participant activities as evident in the top ten recreational activities mentioned prior.

Analyzing the population by gender reveals that as the population increases in age (see **Figure 2**), the female share rises dramatically. The male to female ratio for those that are eighteen and over is nearly even (Male – 50.8%; Female – 49.2%); analyzing gender for those aged sixty-five years and above reveals a ten percent gap in gender make up (Male – 45.4%; Female – 54.6%). Some of this can be explained by the longer lifespan associated with the female gender. This does however depict the need for senior class programming geared towards females, with one of the most popular recreational activities other than walking being water aerobics.

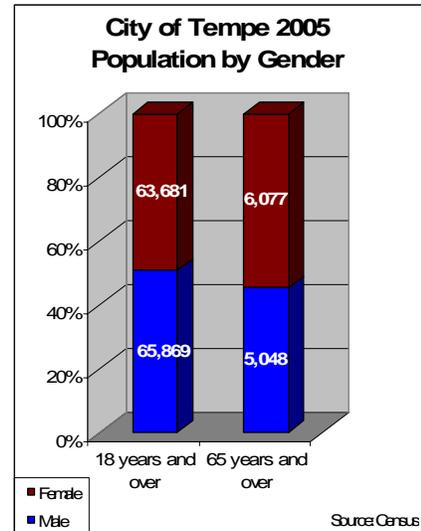


Figure 2 - Population by Gender

Tempe is predominantly non Hispanic or Latino with those being classified as white alone accounting for nearly seventy percent (67.0%; 111,319 persons) of the total population. The next largest individual race is that of Mexican (20.1%; 33,469 persons), followed by Asian alone (4.5%; 7,535 persons) and black (2.9%; 4,784) and American Indian or Alaskan Native (2.3%; 3,758). All other races combined total just over three percent of the population (3.2%; 5,306 persons).

The white population as a whole participates in a wide range of activities, including both team and individual sports of a land and water based variety; however, the white populace has an affinity for outdoor non-traditional sports. Utilizing the Ethnicity Study performed by American Sports Data, Inc., an index of the most popular activities was analyzed. Based on the index, with regard to ethnic sports participation, a demographic index is simply the participation rate of a given segment divided by the overall participation rate for the sport or activity, the white populace is most likely to participate at shooting sporting clays (Index of 127) as compared to the general population. Unlike each of the three other ethnic groups analyzed, the white population does not have an activity that they participate in considerably more than the general population – this can be attributed to a few different things with the most evident being the white populations rather large portion of the total population diluting the index. The second through fifth activities in which the white population is more apt to participate in than the general population are:

- Bow Hunting – Index of 124
- Sailing – Index of 124
- Snowshoeing – Index of 123
- Shooting Trap/Skeet, Kayaking, and Hunting with a Firearm – Index of 121

The most popular activities in terms of total participation percentage, the percentage by which you can multiply the entire population by to arrive at activity participation of at least once in the past twelve months, are:

- Recreational Swimming – 38.9% participation rate (38.9% of the population has participated at least once in the last year)
- Recreational Walking – 37.0% participation rate
- Recreational Bicycling – 20.6% participation rate
- Bowling – 20.4% participation rate
- Treadmill Exercise – 19.1% participation rate

High participation percentages in freshwater fishing (17.3% participation rate), hiking (17.2% participation rate), and tent camping (17.2% participation rate) along with the high index's of bow hunting and sailing demonstrate the high value that the white population places on outdoor activities.

Ethnic minority groups in the United States are strongly regionalized and urbanized, with the exception of Native Americans, and these trends are projected to continue. As with many consumer goods, different ethnic groups have different needs when it comes to recreational activities. Ethnic minority groups are coming in ever-greater contact with white middle-class baby-boomers with different recreational habits and preferences. This can be a sensitive subject since many baby-boomers are the last demographic to have graduated high school in segregated environments. However, this trend is projected to increase as more baby-boomers begin to retire and the minority populations continue to increase.

Hispanic and Latino Americans have strong cultural and community traditions with an emphasis placed on the extended family, many times gathering in large recreational groups where multiple activities geared towards all age segments of the group may participate. Large group pavilions with picnicking amenities and multi-purpose fields are integral in the communal pastime shared by many Hispanics. Based on the 2000 Census, the Phoenix Metropolitan Area had the sixth largest Hispanic population with nearly four hundred and fifty thousand total persons, slightly more than thirty-four percent of the entire population.

Hispanic population is more than twice as likely as the population as a whole to participate in boxing (Index of 264). The next four activities of the top five that the Hispanic population is more likely to participate in than the general population are as follows:

- Bicycling, BMX – Index of 182

- Soccer, Outdoor – Index of 177
- Roller Hockey – Index of 172
- Paintball – Index of 155

Although the index for each of the aforementioned activities was high, none of the activities led in total participation by Hispanics. The most popular activity for Hispanics is recreational swimming (33.2% participation rate), followed closely by recreational walking (31.2% participation rate). Rounding out the top five most popular activities by Hispanics is as follows:

- Recreational Bicycling – 19.7% participation rate
- Bowling – 18.5% participation rate
- Running/Jogging – 18.0% participation rate

For comparison reasons, although Hispanics are nearly twice as likely to participate in soccer as any other race, only 9.0% of the Hispanic population participated in the sport at least once in the last year.

The Asian population is a very different yet distinct ethnic group than the three main groups in the U.S. – white, black, and Hispanic. Most closely compared the Hispanic population in terms of the varying levels of education and cultivation among the many ethnic groups within the Asian population as a whole, most seem to shy away from traditional team sports and outdoor and water based activities. The activity participated in most by the Asian population as compared to the total population is lacrosse (Index of 615); Asian's are more than six times more likely to participate than the total population. Activities two through five are:

- Squash – Index of 414
- Mountain/Rock Climbing – Index of 262
- Yoga/Tai Chi – Index of 229
- Martial Arts – Index of 227

The top five activities in recreational activities in regards to participation percentages are:

- Recreational Walking – 33.3% participation rate
- Recreational Swimming – 31.9% participation rate
- Running/Jogging – 21.6% participation rate
- Bowling – 20.5% participation rate
- Treadmill Exercise – 20.3% participation rate

The black population has historically been an ethnic group that participates in active team sports, most notably football, basketball, and baseball. The black populace exhibits a strong sense of neighborhood and local community through large special events and gathering with extended family and friends including sacred family reunions. Outdoor and water based activities, such as, hiking, water skiing, rafting, and mountain

biking, are not much of a factor in the participatory recreational activities. Analyzing the top five activities that blacks are more likely to participate in than the populations a whole, double dutch (Index of 423), a form of jump rope utilizing two ropes spun in opposite directions, is by far the activity most associated with the black participant whom is more than four times as likely to participate in double dutch than the population as a whole. The remainder of the top five activities black persons are more likely to participate in than the total population is as follows:

- Boxing – Index of 208
- Football, Tackle – Index of 199
- Bicycling, BMX – Index of 172
- Basketball – Index of 160

As depicted with the Hispanic participation, the index does not equate to total participation. The top five activities based on participation rate for the black populace is:

- Recreational Walking – 26.7% participation rate
- Recreational Swimming – 20.2% participation rate
- Basketball – 19.8% participation rate
- Bowling – 17.5% participation rate
- Running/Jogging – 14.3% participation rate

Double dutch, the most likely activity that the black population is to participate in as compared to the total population only returned a participation rate of 2.5%; tackle football, ranked third in the index had a participation rate of 4.0%.

Households and Income Characteristics

Currently, there is an estimated 66,893 households out of which slightly more than twenty-three percent have children under the age of eighteen living on site – twenty-seven percent of households have one or more people under the age of eighteen and thirty-four percent are married-couple families. Half of households are non-family households – nearly twenty percent more than the U.S. average. This can be attributed in part to permanent students living off campus of the university, young alumni, and the convenient location of the City to all other points in the Valley. With half of all households comprised of non-family occupants and the relatively young population, it is assumed that more non-traditional/non-team recreational activities would be preferred.

The median household income in Tempe is \$45,644 (see **Figure 3**). This represents the earnings of all persons age 15 years or older living together in a housing unit. Tempe’s median household income is slightly less than

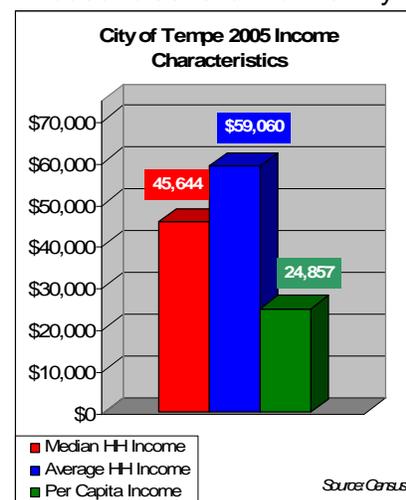


Figure 3 - Income Characteristics

the average U.S. household income reported for 2005 of \$46,242. Compared to the surrounding communities average household income Tempe falls in the middle – more than Phoenix (\$42,353) and Mesa (\$44,861) and less than Scottsdale (\$60,057) and Chandler (\$62,010). Although the household income is considerably less than two neighboring communities, this does not preclude the populace from participating in recreational activities.

Section 2 – Market Analysis

The City of Tempe's Parks and Recreation Department, a 2006 National Recreation & Park Association Gold Medal Award Winner, has fifty-one parks, many of which contain amenities such as picnic tables and barbecue grills, basketball courts, playgrounds, and soccer fields (see Figure 4). The most popular amenities are:

- Picnic tables, barbecue grills, etc. – found in forty parks (78.4% of all parks)
- Basketball courts – found in thirty-two parks (62.7% of all parks)
- Playground/playground equipment – found in thirty-two parks (62.7% of all parks)
- Soccer field(s) – found in twenty-one parks (41.2% of all parks)
- Baseball/Softball field(s) – found in fourteen parks (27.5% of all parks)
- Restroom(s) – found in twelve parks (23.5% of all parks)
- Volleyball court(s) – found in eight parks (15.7% of all parks)

The Parks and Recreation Department also has large and specialty amenities, such as recreational and multi-generational centers, dog parks, lakes and lagoons, a swimming pool, a skate park, and a batting cage.

Tempe is currently in the early stages of a development boom, most of which is occurring in the northern sector near Town Lake, which over the last twenty months has produced more than one billion dollars in construction. As of January 1, 2007, thirty-one of the forty-three approved development projects are currently in at least the design and development phase; of those, twenty-three have been permitted, and eighteen are under construction or completed (please see list at the end of this Section). With the inevitable increase in population associated with the major development comes the increased demand for recreational, leisure, and entertainment. The development, some of which is being described as “the Southwest’s premiere mixed-use development (that) includes accoutrements promoting a 24-hour lifestyle in an energetic location,” and “a location that’s quickly becoming known as the gateway to downtown Tempe and affords us that crucial connection to the Phoenix core,” must be able to accommodate not only the demand place on the area by the residential clientele but by the influx in daily work force and weekend guests.

Parks and Park Amenities

Park Name	Picnic Tables /BBQ Grills	Basketball Court	Playground Equipment	Soccer Field	Baseball/ Softball Field(s)	Restrooms	Volleyball Courts	Dog Park	Water/Lake Area	Recreation/ Multi-Generational Center	Trail	Mini-Park	Tennis Court	Horseshoe Court(s)	Water Play Structure	Baseball Backstop	Batting Cage	Disc Golf	Pool	Preserve/ Wildlife	Skate Park	Stadium
Alegre			X	X																		
Arredondo	X	X	X													X						
Benedict Fields				X	X	X																
Birchett			X	X								X										
Cambell	X			X																		
Canal	X					X			X		X											
Celaya	X	X		X																		
Clark	X	X			X	X	X			X									X			
Cole	X	X	X																			
Corbell	X	X	X	X																		
Creamery	X	X	X	X				X														
Daley	X	X	X		X	X	X							X								
Daumler	X	X	X																			
Diablo Stadium																						X
Dwight	X	X	X	X																		
Ehrhardt	X	X	X																			
Escalante	X	X	X		X					X												
Estrada	X	X	X	X																		
Gaicki	X			X																		
Goodwin	X	X	X	X																		
Hanger	X	X	X	X			X				X											
Harelson	X	X		X									X									
Hayden Butte Preserve																				X		
Hollis	X	X		X	X	X																
Hudson	X	X	X			X							X									
Indian Bend	X	X											X									
Indian Bend Wash																						
Jaycee	X	X	X		X	X	X	X		X					X							
Joyce	X	X	X																			
Kiwanis Community	X	X	X	X	X	X	X		X	X			X	X			X					
Meyer	X	X	X	X	X		X															
Mitchell	X	X	X	X	X		X	X														
Moer	X																	X				
Optimist	X	X	X	X																		
Palmer	X	X	X		X																	
Papago	X	X	X		X	X	X	X	X													
Petersen	X		X																			
Plazita de Descanso												X										
Redden	X	X	X																			
Rio Salado																						
Rotary	X	X	X																			
Scudder	X		X																			
Sallah	X	X	X						X													
Sixth Street / City Hall											X											
Stroud	X	X	X	X																		
Svob	X	X	X	X	X																	
Tempe Beach	X				X	X			X		X				X							
Tempe Sports Complex				X	X	X		X													X	
Tempe Women's Club	X		X									X										
Victory																						
Waggoner	X	X	X	X																		

Figure 4 - Park and Park Amenities

Current Tempe Projects and Descriptions

Armory

- Thirty-story mixed use project with rental units, two residential condominium towers, and twenty-five thousand square feet of retail/office space

Artisan Village

- Arts related development

ASU Gateway

- No information available

ASU Town Lake Property

- Lake front development; unknown

Block 12

- Unknown development; likely residential/mixed-use development

The Brownstones of Tempe

- Sixty three luxury condominiums featuring one, two, and three bedroom

Campus Edge

- Large-scale mixed–use project on the light rail corridor
- Eight stories; one hundred residential condominiums with five thousand square feet of flexible commercial space

Centerpoint on Mill

- Twenty-one and one-half acre mixed-use development featuring residential, retail, entertainment, and offices

Centerpoint Condominiums

- Twenty-two and thirty story residential towers with seven hundred and twenty condominium units and ground floor retail and boutique grocery

Eighth and Rural Condominiums

- Twelve-story condominium and retail building with one hundred fifty six condominium units and eight thousand six hundred forty square feet of retail

KML Mosaic

- Mixed-use development featuring one hundred fifteen condominium units, grocery store, retail, and restaurant

5th and Farmer

- Two rectangular parcels totaling nearly eight acres

Bridgeview at Hayden Ferry Lakeside

- Waterfront condominiums

Hayden Ferry Lakeside Phase Two Office

- Eight and twelve story Class A office space; three hundred thousand total square feet

Hayden Ferry Lakeside Bridgeview

- One hundred and four luxury condominium units

Hayden Flour Mill

- Seven total acres to be restored and developed with condominiums, retail shops, a bakery, and museum and office space

Lakeside Linear Park

- Multi-use path along lake edge with plazas and shade structures

Light Rail Bridge over Town Lake

- Light rail bridge featuring programmable light system

Dolce Villagio Town Homes

- Thirty-seven total luxury units with two or three car garages

SWC Mill and University

- To be developed corner lot

Millstone Town homes

- Enclave of forty eight town home units

Grigio

- Five hundred and fourteen luxury apartments and condominiums located on the north shore of Tempe Town Lake with nearly nine thousand square feet of office and retail space

Lakeshore

- Thirty three-story condos with luxury amenities

Landsource Tempe

- Urban condominium project with one hundred twenty residential units totaling one hundred thirty thousand square feet of residential space, twelve thousand square feet of live/work space, and ten thousand square feet of retail

Le Meridian Hotel

- Five star hotel on the banks of Tempe Town Lake with a spa, conference space, restaurant, and fitness club

Northshore at Playa Del Norte

- One hundred thirty-four luxury waterfront condominiums

Perry Place Condominiums

- One hundred fifty-six one, two, and three bedroom condominium units

Papago Gateway Corporate Center

- Six-story Class A office building with two hundred twenty-five thousand square feet of LEED certified office and biotech facilities complete with a cafeteria, fitness center, and nine hundred car parking structure

Pedestrian Bridge at West End

- Pedestrian access bridge at the downstream dams spanning nine hundred feet

Pier 202

- Twenty-seven acre mixed-use Lake development occurring at eastern end of lake
- One thousand residential units, three hundred thousand square feet of office space, eighty five thousand square feet of retail, three hundred fifty hotel rooms and a pedestrian bridge over the lake near the east dam

Onyx

- Mixed-use development featuring retail, office, and restaurant space
- Gateway park complete with sculptures, art work stations, lake front plazas, amphitheater, boat docks, restaurant plazas, and a floating concert dock

Plaza Del Rio

- Public plaza and events area located on the waterfront

525 Town Lake

- Stylish urban residence featuring resort style amenities and a dog park

Riverside Linear Park – Priest to Hardy

- Three quarters mile multi-use path located along the south bank of the Salt River that will connect to a series of small plazas

Tempe Center for the Arts

- Eighty-eight thousand square foot multi use facility

Tempe Market Place

- One million three hundred thousand square feet of shopping, dining, and entertainment making it the largest center of its kind in the nation
- Featuring a multi-screen movie theater, Dave and Busters adult dining and recreation, national destination and lifestyle tenants, multiple high profile restaurants; outdoor fireplaces, raised dining patios, three hundred seat amphitheater, and water features

Tempe Mission Palms Expansion

- Existing three hundred room resort; possible expansion to include one hundred ninety-two additional rooms and additional meeting space

Tempe Town Lake Welcome Center and Boathouse

- Features full service marina center dedicated to housing boats and equipment dedicated to rowing, and an event, activity, and visitor's center
- Potential for retail, restaurant, catering kitchen and lounge, and fitness center with locker rooms; multiple large multi-purpose facilities with the ability to accommodate one hundred fifty plus persons and five hundred fifty plus persons;

University Square

- More than three acres, 1.4 million square feet, of development featuring a thirty-story hotel with two hundred twenty five rooms, twelve-story office building, twenty-three-story residential/condominium building consisting of two hundred forty residences; ground floor restaurants and retail outlets topped with offices and additional residential condominiums

Section 3 – Sport, Fitness, and Cultural Arts Trends

Using the 2005 Superstudy of Sports Participation, the following national participation trends were identified for core activities – both fitness and recreational. General demographics of sport participants are also identified.

3.1 Fitness Activities

The popularity of fitness in the United States continues to grow. In 2004, Americans devoted a total of nearly thirty billion (29.6) activity days to physical fitness. Health club memberships, an important indicator of interest in fitness, have reached record setting numbers. The forty-one (41.3) million members in 2004 represented a four-and-one-half percent increase over the prior year, and a one hundred forty percent (138%) increase over the initial benchmark year of 1987.

Interest in “softer” forms of exercise is growing, especially with activities that integrate mind and body aspects into exercise routines. Between 2004 and 2005, strong rates of growth were witnessed in Yoga/Tai Chi (18.1%); Pilates experienced the first year of decline, however very small (-1.8%), but still represents a nearly five hundred percent increase since 2000. Participation in water exercise has enjoyed a rebirth, experiencing a growth of seven percent (7.3%) from 2004 to 2005; over the same period of time fitness swimming has declined in participation, witnessing a seven percent (6.9%) decrease from the previous year, however, fitness swimming has shown signs of growth during the period of 2000 to 2005 with a increase in total participation of three-and-one-half percent (3.5%).

Participation in traditional aerobics classes has been on a steady and significant decline since the early 1990’s. This trend has been attributed to multiple factors, including the aging of the fitness population and their need for less strenuous form of cardiovascular exercise and the sudden popularity and increase in Yoga and Pilates type of fitness activities. Since 1998, participation in both high-impact and low-impact aerobics is down thirty-three percent (32.9%) and twenty-nine percent respectively, and step aerobics participation has decreased by thirty-four-and-one-half percent. Low-impact aerobics did however experience a seven percent (6.8%) increase in participation from 2004 to 2005.

Activity Description	2004	2005	1-Year Change 2004-2005
GENERAL FITNESS			
Aerobics (Net)	15,767	15,811	0.3%
- Aerobics (High Impact)	5,521	5,004	-9.4%
- Aerobics (Low Impact)	8,493	9,071	6.8%
- Aerobics (Step)	8,257	7,062	-14.5%
Aquatic Exercise	5,812	6,237	7.3%
Fitness Bicycling	10,210	10,211	0.0%
Fitness Walking	40,299	36,348	-9.8%
Runnng/Jogging	37,310	37,810	1.3%
Fitness Swimming	15,636	14,553	-6.9%
Pilates Training	10,541	10,355	-1.8%
Yoga/Ta Chi	12,414	14,656	18.1%

Figure 5 - General Fitness Participation

Resistance training appeals to a wide range of participants, from youth involved in sports, to fitness enthusiasts interested in overall conditioning, to older adults committed to maintaining independent lifestyles. Resistance training in its earliest forms has been around for centuries, but beginning in the 1960s, gradual introduction of exercise machines into the still-rare strength training gyms would begin to revolutionize the way Americans viewed resistance training. Since the late 1990's, an increasing number of women have taken up resistance training, leading to the latest industry phenomenon of women only and express workout facilities.

Hand weights were the only form of free weight exercise to experience growth from 2004 to 2005, increasing by four percent (4.2%); barbells (-5.0%) and dumbbells (-9.6%) lead to all free weight exercise (net) experiencing a decline of six-and-one-half percent from the previous year. Resistance machines did not fare much better, experiencing a six percent (6.2%) decline in participation over the same time. However, both type of resistance training have shown strong growth over a six year period ending in 2005, with free weights (net) gaining an estimated nine percent (9.4%) in participation and resistance machines increasing by fifteen percent (15.1%).

Participation in equipment based aerobic fitness has continued to be a mainstay in most exercise routines. Treadmill exercise, the reigning king of all equipment based aerobic fitness, with nearly double the participants than the next closest activity, which has begun to show signs of an activity in the mature stage of the growth cycle, posted the smallest increase over a prior year's participation (1.1%) recorded to date. However, since 1998, participation has increased by nearly thirty percent (29.4%).

The activity with the largest growth since 1998 has been the elliptical trainer (331.8%). The elliptical trainer is a more gentle, knee friendly machine than the treadmill, resulting in a strong following among the less experienced and older participants. Stationary cycling on an upright bike has experienced sharp declines since 1998 (-25.0%); however, the senior friendly recumbent bike has experienced an increase of fifty percent (50.9%) over that same period.

Activity Description	2004	2005	1-Year Change 2004-2005
EQUIPMENT BASED FITNESS			
Free Weights (Net)	52,056	48,684	-6.5%
- Barbells	24,103	22,899	-5.0%
- Dumbbells	31,415	28,402	-9.6%
- Hand Weights	30,143	31,417	4.2%
Weight Resistant Machines	30,903	28,986	-6.2%
Stationary Cycling (Net)	31,431	28,525	-9.2%
- Stationary Cycling (Upright Bike)	17,889	15,567	-13.0%
- Stationary Cycling (Spinning)	6,777	6,896	1.8%
- Stationary Cycling (Recumbent Bike)	11,227	10,220	-9.0%
Treadmill Exercise	47,463	47,984	1.1%
Stair-Climbing Machine Exercise	13,300	13,332	0.2%
Elliptical Motion Trainer	15,678	16,679	6.4%

Figure 6 - Equipment Based Fitness Participation

3.2 Aquatic Activity - Recreational Swimming

Nearly four out of ten people (34%) in the United States, ages six and above, swim at least once per year. Nationally, the average swimmer swam thirty-one (31.1) days during 2005. Of all swimmers that swim at least once per year, thirty-six (36.4%) are under the age of eighteen. Not surprisingly, youth have the highest participation rates of all swimmers. Generally speaking, the older a person, the less likely he/she is to swim.

Frequent swimmers, or those swimming fifty-two or more days per year, represent six percent of the national population. These are the individuals most likely to participate in swimming programs or purchase season passes to pools. However, the average number of participation days during the last twelve months is slightly more than thirty-one, and nearly forty-two percent of all participants swam at least twenty-five days over that period of time. Females represent nearly sixty percent (59.6%) of all frequent participants. While the average age of frequent swimmers is twenty-five, children under the age of eighteen swim at the highest participation rates of all age groups (21.1% of children age 6 to 11; 12.8% of youth age 12 to 17). Adults aged thirty-five to forty-four represent that largest group of frequent swimmers eighteen and above (3.9% participation rate); this can be attributed to the likelihood that this group represent a large percentage of parents of youth swimmers, and the devotion to fitness that this age group has expressed. The average household income of frequent participants is greater than the national average. Generally speaking, the higher the income of the household, the more likely a person is to be a frequent swimmer.

Participation rates in swimming have remained steady over the last eight years that statistical data has been recorded by ASD. While there has been a slight decline of three percent (3.2%) in total participation, with over ninety-one million (91.3) Americans swimming at least once during 2005, swimming remains the most popular sport activity in the United States.

Swimming is unquestionably a lifetime sport. Swimmers, on average, have been swimming for slightly more than eighteen (18.3) years. Beginners, or those that have been swimming one year or less, represent only five percent (4.6%) of all swimmers. Nearly eighty percent have been swimming for six of more years.

3.3 Aquatic Activity - Aquatic Exercise

Aquatic exercise has paved the way for a less stressful form of physical activity, allowing similar gains and benefits to land based exercise, including aerobic fitness, resistance training, flexibility, and better balance. Doctors have begun recommending aquatic exercise for injury rehabilitation, elderly patients, and patients with bone or joint problems due to the significant reduction of stress placed on weight-bearing joints, bones, and muscles, and the affect that the pressure of the water assists in reducing swelling of injuries.

More than six million persons participated in aquatic exercise in 2005, with the overwhelming majority (75.1%) being female. The average age of participant is forty;

frequent participants (100+ days) are generally older (average age of 48). Females represent eighty-six percent (85.8%) of all frequent users.

The average number of participation days during the last twelve months is nearly fifty-seven (56.6), equal to nearly twenty-six more days than the average recreational swimmer. Slightly more than fifty-five percent of all persons who participated in aquatic exercise in the last twelve months exercised at least twenty-five days.

Participation rates in aquatic exercise have remained steady over the last eight years that statistical data has been recorded by ASD. While there had been a slight decline since 1998, the last recorded year showed an increase in participation of eight percent (7.9%).

3.4 Court Sports

According to American Sports Data, both basketball and volleyball have experienced long-term declines in total participation. Since its height in 1998 of forty-two (42.4) million participants, basketball participation has steadily declined to thirty-two (31.9) million participants (-24.6%). Between 2001 and 2002, declines in participation were less severe, with participation down only five percent (5.4%). However, more than one out of every ten Americans participated in basketball during 2005. Basketball is most popular among the younger generation, with the majority of users (70.0%) being less than twenty-four years of age (average age of 21); the largest participation per age segment belongs to those that are twelve to seventeen years of age. Although it is a predominantly male sport, twenty-six percent (25.7%) of women under the age of eighteen participate in the sport. Fifty three percent of participant participated in basketball activities at least twenty-five times in the last twelve months, with the average number of days of participation of nearly forty-four (43.5). Although basketball does not seem to be a lifelong sport, it does seem to grab the attention of the youth, adolescent, and early adult population for a considerable length of time – the average number of years participated is nine (9.4), with thirty-four percent of all participants having participated for more than ten years.

Although sand/beach volleyball has followed in a similar path as basketball, experiencing a thirty-five percent (34.9%) decrease since 1998, court volleyball has actually posted gains in participation over the past three years. Court volleyball participation consists predominantly of females (61.4% of all participants). The majority of participants fall within the twelve to seventeen year age segment, and along with the six to eleven age segment, make up more than half of all participants. This indicates that the grade school and club teams account for a large portion of participants. Although the average number of days participated in the last twelve months is thirty-three (32.6), only forty-one percent (40.8%) participated more than twenty-five times. Length of participation averages nearly six (5.9) years, with seventeen percent (17.3%) having participated more than ten years, indicating that the sport has relatively new and short-lived participants.

3.5 Traditional (“Bat and Ball”) Team Sports Trends

Traditional sports, referred to as the social glue that bonds the country, play an important role in American society. By teaching important values of teamwork and discipline while stressing physical fitness and a healthy lifestyle, sports have been the building block for many of Americans.

The sport that evokes more nostalgia among Americans than any other is baseball. So many people play the game as children and grow to become devout followers of the professional game that it has become known as "the national pastime"; however, based on participation, baseball has experienced a seventeen percent decrease between 1998 and 2005. Basketball, a game originating in the U.S., is actually the most participated in sport among the traditional “bat and ball” sports with nearly thirty-two (32) million estimated participants. This popularity can be attributed to the ability to compete with relatively small number of participants, the limited number of supplies needed to participate, and the limited space requirements necessary – the last of which make basketball the only traditional sport that can be played at the majority of American dwellings.

The sport that has had the largest increase in popularity, although a relatively modest one million six hundred thousand American’s participate, is Lacrosse. Lacrosse increased by seventy-six percent from 2004 to 2005; ice hockey (29% increase), touch football (8.4% increase), and outdoor soccer (8.1% increase) are the four sports with the largest percentage increase in participation from 2004 to 2005. Of the four sports with the largest growth, only soccer has been a staple of American children for more than a decade.

Activity Description	2004	2005	1-Year Change 2004-2005
BAT & BALL SPORTS			
Baseball	9,694	10,255	5.8%
Basketball	34,223	31,963	-6.6%
Football, Tackle	5,440	5,794	6.5%
Football, Touch	12,993	14,083	8.4%
Ice Hockey	1,998	2,585	29.4%
Lacrosse	914	1,622	77.5%
Racquetball	5,533	4,909	-11.3%
Soccer, Outdoor	14,608	15,786	8.1%
Softball, Fast Pitch	4,042	3,519	-12.9%
Softball, Slow Pitch	14,267	12,859	-9.9%
Tennis	18,345	18,305	-0.2%
Volleyball, Court	11,762	12,371	5.2%
Volleyball, Sand/Beach	7,741	6,884	-11.1%

Figure 7 - Traditional Sports Trends

Diamond Sports

According to American Sports Data, baseball, and softball, both fast pitch and slow pitch, have all experienced sharp declines in the past decade. Baseball, although thought of as the national pastime, has dipped from fifteen million participants in the early 1990’s to a modest total of ten million three hundred thousand (33.6%). Since 2000, participation

has been relatively flat, hovering around ten million participants. Baseball is a sport predominantly played by those under the age eighteen, with the majority of those youth being under twelve. According to ASD, league play past the age of eighteen is miniscule. The majority of all participants fall within the six to eleven year age segment, and along with the twelve to seventeen age segment, make up more than half of all participants (66%). Average number of days participated in the last twelve months is nearly forty-seven (43.6), fifty-five percent participated more than twenty-five times – this indicates a strong presence in the league play. Length of participation average seven (7.2) years, with twenty-three percent (23.2%) having participated more than ten years, indicating that the sport has a relatively short-lived lifespan – evident by the many youth leagues including club and travel teams; however, as they participant ages, the sport experiences a sharp decline in participation.

Softball has two advantages over baseball – participants are offered two versions, fast pitch and slow pitch, and slow pitch allows those with a sedentary lifestyle to participate. Since participation records were first kept, fast pitch softball has remained stable with an estimated current participation level of three-and-one-half million, down from a high of four million in 2004. Slow pitch softball has also experienced a decline, falling from a high of nineteen (19.4) million participants in 1998 to slightly less than thirteen million in 2005 (33.7% decline). Slow pitch softball is played by nearly all age segments, the majority of those being twenty-five to thirty-four; more than half of all participants (52%) are twenty-five and above. The average age of a participant in slow pitch softball is twenty-seven (27.4). Average number of days participated in the last twelve months is twenty-four (23.9), only thirty-five percent participated more than twenty-five times. Length of participation averages ten (9.7) years, with thirty-six percent (36.4%) having participated more than ten years.

Field Sports

Field sports have boomed in recent years, however, it has been the relatively obscure sports making the biggest impact. All of the field sports analyzed increase in single year participation percentages with Lacrosse making the largest percentage gains (77.5% increase; 1.6 million participants in 2005) followed by touch football, soccer, and then tackle football. Only touch football has been statistically tracked for participation since 1987; it has experienced a drastic decrease (31%) since 1987, but has been stable since 1998 (14 million participants in 2005). Tackle football, tracked since 2000, posted the largest participation numbers ever in 2005 (5.8 million participants). Soccer, long a staple of youth sports, has only been tracked for participation by ASD since 2003, however, participation has been relatively stable (15.7 million participants in 2005).

Both touch and tackle football is predominantly played by those under the age eighteen. Average number of days participated in the last twelve months is twenty-three (23.3; touch) and fifty-four (53.6; tackle). League play is responsible for the large number of participation days in tackle football, whereas touch football has relatively few practices and many unorganized participation days. Length of participation average for touch football is six years while tackle football averages just under four (3.9) years of participation by individual. Nineteen percent (19.2%) have participated more than ten

years in touch football; only six and one-half percent participate more than ten years in tackle football. Although touch football reports ample participation numbers, the majority of those can be attributed to un-organized “pick-up” games held everywhere from front yards to alleys. Tackle football’s participation is mainly confined to leagues, requiring a dedicated facility.

Although soccer has been played for decades, American Sports Data has only recently been recording participation data. Soccer has remained steady, although a slight decrease of two percent has occurred from 2003 to 2005, participation did increase by a little more than one million participants from 2004 to 2005 ((15.7 million participants in 2005). Soccer is most popular among the younger generation, with the half of users (50.3%) being less than twelve years of age, and another twenty-five percent between the ages of twelve and seventeen (average age of 14.9). Fifty percent of participants participated in soccer activities at least twenty-five times in the last twelve months, with the average number of days of participation of forty-one (41.1). The average number of years for soccer participation is six (6.1), with eighteen percent (17.6%) of all participants having participated for more than ten years.

Lacrosse saw the largest increase in participation of all activities tracked by American Sports Data from 2004 to 2005. A total of one million six hundred thousand individuals participated in 2005, a seventy-seven and one-half percent (77.5%) increase from 2004. Although lacrosse has only recently been tracked by ASD, 2005 had nearly half a million more participants than any other year – a relatively small number for more traditional type sports, but an important number to remember. Due to the short time period of survey results, it is still too early to tell if Lacrosse is a trend or a fad. Lacrosse is most popular among the younger generation, with eighty-five percent of participants being under the age of twenty-five. Only thirty-three percent of participants participated in lacrosse activities at least twenty-five times in the last twelve months, with the average number of days of participation at twenty-seven (26.6). The average number of years for lacrosse participation is four (3.7), with seven percent (6.9%) of all participants having participated for more than ten years.

Recreational sports participation by major age segment is presented in the following figures. Average participation based on American Sports Data, 2003, is applied to the estimated population of the County to generate an estimated market size for each sport. This estimated market refers to all individuals who participate at least once per year in the respective sport. Average number of days participating was multiplied by the estimated market size for an estimated total participation days per sport. Average age of participant is also listed.

3.6 Cultural and Performing Arts

In 2002, the National Endowment of the Arts commissioned the Survey of Public Participation in the Arts (SPPA) researched American trends in the arts, and specifically personal participation in the arts, through questions on performing and creating art.

The SPPA found that over seventy-six percent of adults have experienced art in some form in the twelve months ending August of 2002. According to the survey results,

singing in a choir, chorale or other vocal group remained the most popular form of personal performance in 2002; with ten (9.8) million adults participating, it had more than double the number of participants than any other type of personal performance except dance. Weaving and sewing and other needlework remained the two most popular of all the visual arts activities. Though these activities have relatively higher levels of participation than other performing arts or visual arts activities, both experienced statistically significant declines from 1992 to 2002. Measured in millions of adult participants, only photography, ballet, composing music, and writing literature increased in activity from 1992 to 2002. The percentage of adults who said that they had performed classical music in the previous twelve months dropped by one-half in 2002, from four percent to two percent; adults who performed dance other than ballet also dropped by one-half, from eight percent to four percent, of respondents. Both declines are statistically significant.

Based on the 2002 survey, more respondents took classes in the performing arts in the prior twelve months (6 million participants) than in the visual arts (5 million participants). The most popular type of class was music — two percent of respondents reported that they had taken a music class in the past twelve months (4 million participants); about the same share of adults participated in performing arts and visual arts activities (59%) in the twelve months ending August 2002. For performing arts, most adults participated by watching or listening to music, plays, or dance on television, the radio, via audio recordings, or the internet. Over half of adults say they have viewed some type of performing arts media in the previous twelve months. Participation through attendance at live events is smaller (32 %), with more adults attending plays, both musical and non-musical plays, than other types of performing arts events.

For the visual arts, participation is most often in the form of attending an art museum or gallery or an arts and crafts fair or festival. In addition, nearly thirty-nine percent report personally creating some type of visual art; however, this does include ownership of an original artwork. Approximately one-half of U.S. adults experienced “literature”, poetry, plays, novels, or short stories, in some way in 2002.

Section 4 – Outdoor Activity Trends

Technology has promised to simplify the American way of life and promised abundant leisure for years. Unfortunately, for most people, this promise of simplicity and leisure has turned out to be a myth. With sixty percent of women now in the work force, an unheard of sum two decades ago, and many individuals working multiple jobs, it is apparent that the society as a whole has either opted for greater financial security, or found the workload a necessity, over leisure time. The implications that this epidemic has for public recreation are vast – the public has shifted their attention away from traditional team sports and have begun to increasingly want their recreation, entertainment, and leisure near at hand in order to take advantage of the small blocks of time which are available, much of which takes place after the work day and on weekends and holidays. Recent studies conducted by the Bureau of Outdoor Recreation indicate that Americans prefer relatively simple outdoor recreation opportunities. The well-balanced recreation system provides opportunities for both indoor and outdoor activities of both an active and a passive nature.

Previous surveys conducted by and reported in the Roper Report demonstrate widespread public recognition of the positive contributions to quality of life resulting from participation in outdoor recreation. The general population links recreation to overall happiness, family unity, health, improved educational opportunities, and deterrence of crime and substance abuse. The latest trend of declining participation, which began in 2001, in many recreational activities and the frequency of participation clearly put the benefits arising from recreation participation, both perceived and actual, at risk.

As the continuing growth in ownership and use of electronic communications and leisure options by the typical American – a trend that today is clearly visible to all by just taking a stroll down the local market, retail corridor, or airport – those in the recreation industry must address this technological phenomenon and form a strategy to effectively integrate into activities desired. The ability to convert traditionalist type activities into a technologically intertwined pastime may be the catalyst for increased participation in the near future.

Outdoor Recreation Participation as Reported in the Roper Report

Americans participate in a wide range of outdoor recreation activities, from traditional bat and ball sports, “European” influenced sports such as lacrosse and squash, to outdoor enthusiast activities such as hiking, camping, hunting, and fishing. Although there are variations in participation by activity, region, income, and race, outdoor recreation in general remains a pervasive leisure-time use across the nation.

Nearly nine in ten (87%) of the total population participated in an outdoor recreational activity over the past twelve months; average number of activities participated in was 5.4 of the 37 outdoor recreation activities tracked by the Roper Report. Walking for fitness/recreation, driving for pleasure, and swimming continue to be the three top choices of the public in terms of outdoor participation with each listed by more than four in ten Americans.

According to the Roper Report, beginning in 2001, and continuing into 2003, the trend of increasing outdoor recreation participation changed into downward trend. For 2003, only six tracked activities showed an increase in participation:

- Driving for pleasure
- Swimming
- Picnicking
- Golf
- Canoeing/kayaking
- Rowing

Only driving for pleasure experienced an increase of note. Twenty-one activities experienced a decline in participation, including hiking, in-line skating, walking for fitness, running/jogging, and visiting cultural sites.

Many factors have been attributed to the decline in outdoor activities – the biggest single factor is the ever shrinking pool of leisure time available. Non-direct competitors to outdoor recreation has also began to encroach, most notably are the Internet and other multi-media outlets.

Not only was total participation reportedly experiencing a decline, but so to was the frequency of which those actual participated. Between 2001 and 2003 a five point drop was reported in participation in recreational activities several times per week (26% versus 21%) and a seven point drop in those reporting participation several times per month (29% versus 22%). The age segment most likely to participate on a frequent basis has shifted from the eighteen to twenty-nine year old age segment to the next two age segments up – thirty to forty-four age group and forty-five to fifty-nine age group.

The quandary facing a portion of the population, low household income, which many times reduce the ability of one to pursue a higher education, thus reducing the potential earning power, has a direct correlation on participation. As one's education level increases, so does their average participation frequencies in outdoor recreation; similarly, households reporting incomes of seventy-five thousand dollars or more participate in an average of nearly six activities (5.8) as opposed to only four activities (3.8) as reported by households earning incomes below thirty thousand dollars.

Nature Based Outdoor Tourism Trends in Western and Mid-Western MSA

A study performed in conjunction by USDA Forest Service and the Southern Research Station of the eight western and mid-western metropolitan statistical areas (MSA) found that larger percentages of Denver, Minneapolis, Phoenix, and Seattle populations participate in nature-based tourism activities relative to all the major western metro areas combined. Phoenix residents participate at relatively high rates only in the two hunting activities – big game and small game hunting.

Relative to total population of all persons 16 or older, western MSA residents participate at notably higher rates in day hiking, developed camping, driving off road, primitive camping, coldwater fishing, backpacking, and small game hunting. The only notably lower participation rate for western MSA residents is canoeing.

The table shown in **Figure 8** portrays twenty nature-based outdoor tourism activities. They are listed in order by percentage of the Phoenix MSA population sixteen or older who participated between 2000 and 2004 (first column in the table). The numbers in the column second from the right depicts the ratio of the percentage of people in each western metro area who participate in an individual activity divided by the overall percentage participating across the eight western metro areas combined; converting the data to ratios more easily illustrates which activities and which metro areas have larger or smaller percentages of people participating. Especially noteworthy are ratios larger than one point five, which indicate much higher percentages of a particular metro area population participating, or a ratio less than zero point seven, indicating a much lower participation rate.

As mentioned previously, the only two categories in which the Phoenix MSA participate at higher levels than the other MSA's are big and small game hunting. Two categories which are participated in at levels much lower than all comparable western and mid-western MSA's are canoeing and cross country skiing. Even though big and small game hunting surveyed well for participation in the Phoenix MSA, no activity lead all eight surveyed MSA's in participation – assumedly due to the smallest total populace among the eight surveyed – and only two activities finished second in total participation among all eight MSA's – small game hunting and off road driving.

Activity	Phoenix MSA % of Pop Participating 2000-2004	U.S. Total % of Pop Participating 2000-2004	Combined Western MSA % of Pop Participating 2000-2004	Phoenix MSA Ratio of % of Participation**	Rank of Phoenix MSA Ratio to Western MSA Ratios
Picnicking	49%	54.2%	53.7%	0.91	T-6
Day hiking	44%	32.6%	41.5%	1.05	4
View/photograph other wildlife	41%	45.2%	40.9%	1.00	5
Visit a wilderness or primitive area	41%	32.6%	34.4%	1.19	3
Swimming in lakes and streams, etc.	38%	42.3%	39.4%	0.95	T-6
View/photograph birds	29%	32.5%	29.1%	0.99	4
Developed camping	25%	26.7%	29.0%	0.88	6
Drive offroad	25%	18.6%	17.5%	1.40	2
Primitive camping	21%	16.1%	15.9%	1.31	3
Warmwater fishing	18%	22.4%	14.6%	1.23	4
Mountain biking	18%	20.9%	22.8%	0.79	7
Coldwater fishing	16%	13.4%	13.0%	1.19	3
Backpacking	15%	10.5%	13.3%	1.15	4
Rafting	12%	10.0%	8.6%	1.41	3
Horseback riding on trails	8%	7.7%	7.6%	1.05	4
Small game hunting	8%	7.1%	4.1%	2.02	2
Big game hunting	7%	8.4%	4.0%	1.65	3
Downhill skiing	7%	8.4%	10.1%	0.72	6
Canoeing	4%	9.7%	6.6%	0.55	7
Cross country skiing	1%	3.7%	3.6%	0.28	7

Figure 8 - Western and Mid-Western MSA Outdoor Activity Participation

Retirees Participation in Outdoor Activities

Retirees sixty-five and older remain active in many activities well into their senior years. Just under thirty-five million Americans, or about one of every eight persons (12.4%), were sixty-five years or older at the time of the 2000 Census. Over ninety percent of these older Americans are retired; almost all are retired by age seventy-five.

For purposes of this study, retirees were broken into three age groups, sixty-five to seventy-four, seventy-five to eighty-four, and eighty-five and above; data was gathered from the National Survey on Recreation and the Environment (NSRE). Across all the activities surveyed, with the only exception being gardening or landscaping for pleasure, the percentage of retirees who participate in an activity is less than that for those people under age sixty-five. With a few exceptions among activities, participation percentage falls from age sixty-five to age eighty-five and above. For the more passive activities, such as walking, family gatherings outdoors, sightseeing and viewing/photographing wildlife and flowers, the decrease with age is gradual. With the more physically demanding activities, such as swimming, hiking and mountain biking, the decrease in percentage participating sharply increases with age; however, some percentage of even the oldest of retirees participate across most activities, regardless of how physically demanding they are.

Although age does play a role in the ability to participate in all activities, eleven of activities surveyed by NSRE illustrate the enduring quality regardless of age, such as:

- Walking for pleasure
- Family gatherings
- Gardening and landscaping for pleasure
- View/photograph natural scenery
- Visit nature centers, etc.
- Driving for pleasure
- Picnicking
- Sightseeing
- Visit historic sites
- View/photograph other wildlife
- View/photograph wildflowers, trees, etc.

As the retiree population grows in future years, accessible opportunities for these popular activities should be accommodated.

Section 5 – Conclusion

5.1 Recreation Facility Standards

Recreation, described as the social glue of American society, is a vital component of the human species. Not only does recreation provide an outlet for exercise and fitness but it also achieves the goal of greater self-actualization – a need placed at the pinnacle of the hierarchy of human needs by psychologist Abraham Maslow, to be satisfied only after the basic needs for food, clothing and shelter; self-actualization refers to “man’s desire for fulfillment...to become everything that one is capable of becoming.”

Utilizing the 1999 Master Plan’s recreation facility/amenity needs assessment as a base, an update was performed for the projected 2010 population. Population projections were derived by applying straight line linear regression to populations for 1990 (141,865), 1999 (159,496), and 2005 (166,171); population estimates for 1990 and 1999 were taken from the 1999 Master Plan while 2005 estimates utilized the 2005 Community Survey from the U.S. Census.

Based on recent trend data from the American Sports Data, Inc., traditional sports have been on a slow decline over the past decade. Even so, due to the high percentage of participants, a small decline results in a relatively small reduction in users. By simply applying the standards from the 1999 Master Plan, the largest increase in facility need from 2004 to 2010, with a base facility count from 1999, will be in the form of basketball courts (2004 Need – 90; 2010 Need – 97), and rectangular playing fields, including soccer and football fields (2004 Need – 44; 2010 Need – 49). A complete updated chart is presented in **Figure 9**.

Facility/Amenity	Existing Facilities (1999)	Recommended Standard (1999)	Additional Needed, 2004*	Additional Needed, 2010**
Softball Fields	32	1 / 5,000	1	3
Baseball Fields	3	1 / 5,800	25	27
Soccer/Football Fields	39	1 / 2,000 (Soccer) 1/10,000 (Football)	44	49
Running Tracks	-	1 / 10,000	16	18
Basketball Courts	44	1 / 1,250	90	97
Tennis Courts	51	1 / 4,000	-	-
Playgrounds	41	1 / 2,500	26	29
Shelters/Ramadas	25	1 / 10,000	-	-
Swimming Facilities	4	1 / 15,000	7	8
Community Centers	1	1 / 50,000	2	3

*Population estimate of 167,000 by Year 2004; as reported in P&R Master Plan performed in 1999; Surplus/deficit calculated from base year of 1999

**Population estimate of 175,610; derived by applying straight line linear regression to years 1990 (pop 141,865), 1999 (pop 159,496), and 2005 (pop 166,171); Surplus/deficit calculated from base year 1999

Figure 9 - Facility/Amenity Need

5.2 Recommendations

Based on a survey conducted by the Forest Service and the Southern Research Station from 1999 to 2004, participation in walking, outdoor family gatherings, gardening, viewing/photographing natural scenery, and visiting nature centers topped the lists for all time periods. Across the years of surveying, the population participating increased for many activities between fall 1999 and spring 2004.

Important aspects to be considered for the development of facilities and amenities is the steady decline in traditional recreational activities, especially team sports, over the past decade (see **Figure 10**).

Activity	1987	1990	1993	1998	2000	2003	2004	2005	% '98-'05	% '87-'05
Baseball	15,098	15,454	1,586	12,318	10,881	10,885	9,694	10,255	-16.7%	-32.1%
Basketball	35,737	39,808	42,138	42,417	37,552	35,439	34,223	31,963	-24.6%	-10.6%
Ice Hockey	2,393	2,762	3,204	2,915	2,761	2,789	1,998	2,585	-11.3%	8.0%
Football, Touch	20,292	20,894	21,241	17,382	15,456	14,119	12,993	14,083	-19.0%	-30.6%
Football, Tackle	n/a	n/a	n/a	n/a	5,673	5,751	5,440	5,794	n/a	n/a
Lacrosse	n/a	n/a	n/a	926	751	1,132	914	1,622	75.2%	n/a
Soccer, Outdoor	n/a	n/a	n/a	n/a	n/a	16,133	14,608	15,786	n/a	n/a
Softball, Fast Pitch	n/a	n/a	n/a	3,702	3,795	3,487	4,042	3,519	-4.9%	n/a
Softball, Slow Pitch	n/a	n/a	n/a	19,407	17,585	14,410	14,267	12,859	-33.7%	n/a
Volleyball, Court	n/a	n/a	n/a	n/a	n/a	11,008	11,762	12,371	n/a	n/a
Volleyball, Sand/Beach	n/a	11,560	13,509	10,572	8,762	7,454	7,741	6,884	-34.9%	n/a
Racquetball	10,395	9,213	7,412	5,853	5,155	4,875	5,533	4,909	-16.1%	-52.8%
Tennis	21,147	21,742	19,346	16,937	16,598	17,325	18,345	18,305	8.1%	-13.4%
Martial Arts	n/a	n/a	n/a	5,368	5,722	6,883	6,898	6,028	12.3%	n/a
Roller Hockey	n/a	n/a	2,323	3,876	3,287	2,718	1,788	2,094	-46.0%	n/a
Roller Skating, In-Line	n/a	4,695	13,689	32,010	29,024	19,233	17,348	16,490	-48.5%	n/a
Skateboarding	10,888	9,267	5,388	7,190	11,649	11,090	10,592	11,382	58.3%	4.5%
Bicycling, BMX	n/a	n/a	n/a	n/a	3,977	3,365	2,642	2,480	n/a	n/a
Bicycling, Recreational	n/a	n/a	n/a	54,575	53,006	53,710	52,021	51,431	-5.8%	n/a
Walking, Recreational	n/a	n/a	n/a	80,864	82,561	88,799	92,677	87,628	8.4%	n/a
Artificial Wall Climbing	n/a	n/a	n/a	4,696	6,117	8,634	7,659	8,869	88.9%	n/a
Recreational Swimming	n/a	n/a	n/a	94,371	93,976	96,429	95,268	91,314	-3.2%	n/a
Aerobic Dancing	21,225	23,015	24,839	21,017	17,326	16,451	15,767	15,811	-24.8%	-25.5%
Aquatic Exercise	n/a	n/a	n/a	6,685	6,367	7,141	5,812	6,237	-6.7%	n/a
Fitness Bicycling	n/a	n/a	n/a	13,556	11,435	12,048	10,210	10,211	-24.7%	n/a
Fitness Walking	27,164	37,384	36,325	36,395	36,207	37,945	40,299	36,348	-0.1%	33.8%
Running/Jogging	37,136	35,722	34,057	34,962	33,680	36,152	37,310	37,810	8.1%	1.8%
Fitness Swimming	16,912	18,045	17,485	15,258	14,060	15,899	15,636	14,553	-4.6%	-13.9%
Pilates Training	n/a	n/a	n/a	n/a	1,739	9,469	10,541	10,355	495.5%	n/a
Yoga/Tai Chi	n/a	n/a	n/a	5,708	7,400	13,371	12,414	14,656	156.8%	n/a
Free Weights	22,553	26,728	28,564	41,266	44,499	51,567	52,056	48,684	18.0%	115.9%
Weight Resistant Machines	15,261	16,776	19,446	22,519	25,182	29,996	30,903	28,986	28.7%	89.9%
Stationary Cycling	30,765	39,823	35,975	30,791	28,795	30,952	31,431	28,525	-7.4%	-7.3%
Treadmill Exercise	4,396	11,484	19,685	37,073	40,816	45,572	47,463	47,984	29.4%	991.5%
Stair Climbing, Machine Exercising	2,121	13,498	22,494	18,609	15,828	14,321	13,300	13,332	-28.4%	528.6%
Elliptical Motion Trainer	n/a	n/a	n/a	3,863	6,176	13,415	15,678	16,679	331.8%	n/a

Figure 10 - Activity Participation Trends, 1987 to 2005

Traditional sport activities such as baseball, basketball, touch football, racquetball, aerobics (dancing), and stationary cycling have all experienced both short (1998 to 2005) and long term (1987 to 2005) declines; these are depicted in red highlights on **Figure 10**. Ice hockey, fast-pitch and slow-pitch softball, sand volleyball, roller hockey, in-line roller skating, recreational bicycling, recreational swimming, aquatic exercise, fitness bicycling, and stair climbing exercise (machine) have all experienced short term decline. However, of those activities that have experienced declines, four do have participation of greater than twenty-five million persons; they are:

- Stationary Cycling – Twenty-eight million participants (28.525M)
- Basketball – Thirty-one million participants (31.963M)
- Recreational Bicycling – Fifty-one million participants (51.431M)

- Recreational Swimming – Ninety-one million participants (91.314M)

Although the traditional sports have experienced declines, this does not imply the endorsement of lowering the facility and amenity standards; this is evident by the sizeable and continued support, while somewhat stagnant, of these participants groups.

With the increased density destined for the Tempe area and the confirmation of the continued participation in non-team/sport oriented outdoor activities such as walking, running/jogging, and gatherings, it is recommended that the City invest in a variety of program and activity amenities, including:

- Grand natural areas – areas suitable for large gatherings, special events, and outdoor leisure; can include plazas, “green oasis”, respite/shade areas, native botanical restoration areas, demonstration areas, alternative sport activities such as disc golf, croquet, and bocce ball, and multiple trail links
- State of the art trail network – multi-use trail network providing multiple trail heads and linkages and consisting of various surfaces programmed towards multi-faceted users and varying degrees difficulty/specialty of use; surfaces ranging from three-quarters inch minus crushed granite, soft/nature paths, paved asphalt or concrete; programmed to accommodate recreational walking and bicycling, fitness walking and bicycling, hiking, in-line skating, and mountain biking
- Non-traditional recreational amenities – urban skate park designed to incorporate the “urban environment” seen in metropolitan and business district areas complete with stairs, benches, hand rails, etc.
- Water related recreation – dedicated recreational area at the lake shore for remote controlled boats; complete with picnic/shade pavilion and staging area

By focusing on the non-team/sport related activities, the City of Tempe is able to address the trends of the entire population. As presented in the Demographic Analysis, each of the analyzed ethnic groups – white, Hispanic, Asian, and black – participated as an ethnic group in recreational swimming and recreational walking more than almost any other activity; each ethnic group had a participation rate for recreational swimming and recreational walking ranked in the top five of all surveyed recreational activities including traditional sports and exercise. Running/jogging was also one of the five most participated in activities for three of the four ethnic groups while recreational bicycling was ranked in two of the four ethnic groups as one of the five most popular activities.

Although age does play a role in the ability to participate of a particular individual in some activities, eleven of activities surveyed by NSRE illustrate the enduring quality regardless of age, including:

- Walking for pleasure
- Family gatherings
- Gardening and landscaping for pleasure
- View/photograph natural scenery

- Visit nature centers, etc.
- Driving for pleasure
- Picnicking
- Sightseeing
- Visit historic sites
- View/photograph other wildlife
- View/photograph wildflowers, trees, etc.

In 2004, national spending on recreational and entertainment products and services nearly topped seven hundred and six billion dollars, something not too exorbitant when considering that studies have determined that the goal of leisure and entertainment goes beyond simple pleasure toward achieving greater self actualization and provide emotional satisfaction. With trends emerging that entail emerging destinations, new products, involved participants, and specialty markets, great opportunity exists in the form of a blank canvas for the City of Tempe.