CHAPTER ONE – MARKET ANALYSIS

1.1 INTRODUCTION

The Warrenville Park District ("District") selected PROS Consulting to assist in completing a Parks and Recreation Master Plan ("Plan"). The primary purpose of this Plan is to review and recommend the organization and administration of District parks and recreation facilities, program, and services.

A key component of the Plan process is a Demographic & Recreation Trends Analysis. This analysis will help provide a thorough understanding of the demographic makeup of residents within the District, as well as national and local recreational trends.

1.2 DEMOGRAPHIC ANALYSIS

The Demographic Analysis describes the population within Warrenville Park District Jurisdiction. This assessment is reflective of the total population in the district 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.

1.2.1 DISTRICT DEMOGRAPHIC OVERVIEW

2022 Total Population
13,856

2022 Total Households
5,154

2022 Median Age
39.5

2022 Median Household Income
$100,635

2022 Race
67% White

1.2.2 METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in August 2022 and reflects actual numbers as reported in the 2020 Census as well as estimates for 2027, 2032 and 2037 as obtained by ESRI. Straight line linear regression was utilized for 2027, 2032 and 2037 projections. The district boundaries shown below were utilized for the demographic analysis.

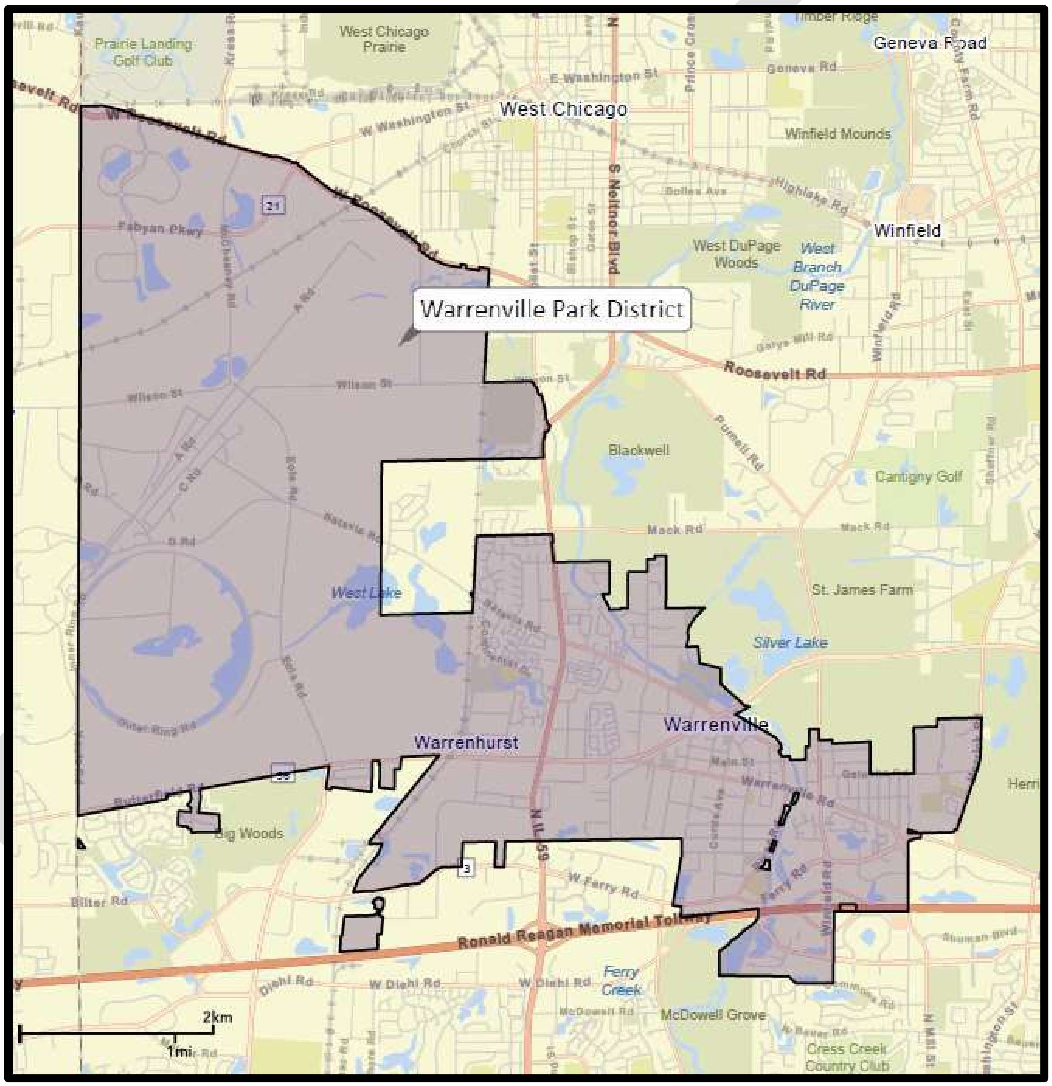


Figure 1: Warrenville Park District Boundary Service Area

1.2.3 DISTRICT POPULACE

POPULATION

The District's population has experienced a notable growing trend in recent years, increasing 6.3% from 2020 to 2022 (averaging 3.15% per year). This is significantly above the national annual growth rate of 0.74% (from 2020-2022). Similar to the population, the total number of households also experienced an increase in recent years (6.5% since 2020).

Currently, the population is estimated at 13,856 individuals living within 5,154 households. Projecting ahead, the total population and total number of households are both expected to continue growing at an above average rate over the next 15 years. Based on 2037 predictions, the District's population is expected to have 15,171 residents living within 5,794 households. **(See Figures 2 & 3)**

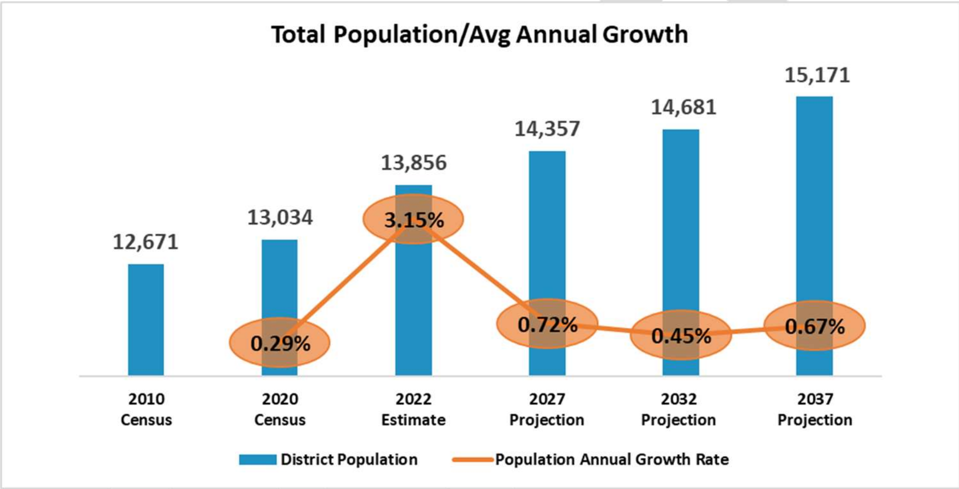


Figure 2: Total Population and Average Annual Growth

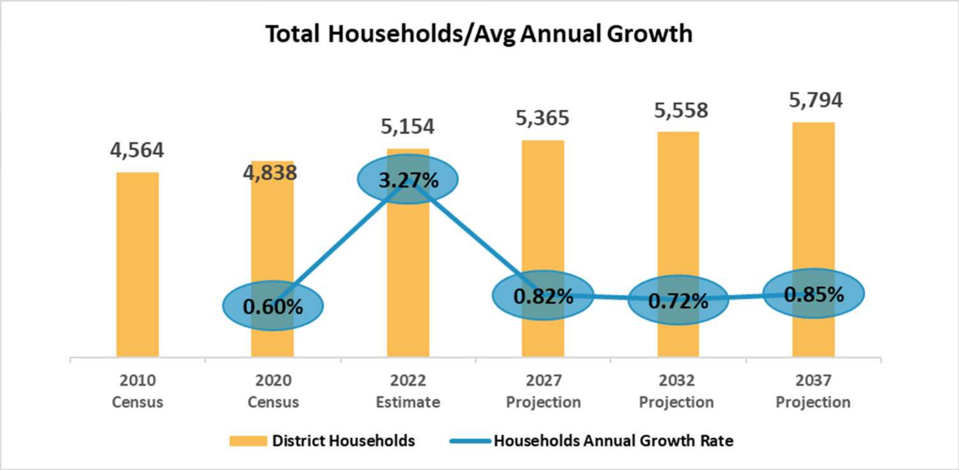


Figure 3: Total Households and Average Annual Growth

AGE SEGMENT

Evaluating the District's total population by age segments, it exhibits an aging trend, with approximately 30% of its residents being over the age of 55-years old. The population has a median age of 39.5 years old which is one year older than the U.S. median age of 38.5 years. Assessing the population as a whole, the District is projected to continue aging for the foreseeable future. Over the next 15 years, the 55+ population is expected to grow an additional 7%, totaling 37% of the District's population. This is largely due to the increase in life expectancy coinciding with the remainder of the Baby Boomer generation shifting into the senior age groups and at the same time, the population under 54 is anticipated to decrease. (**See Figure 4**).

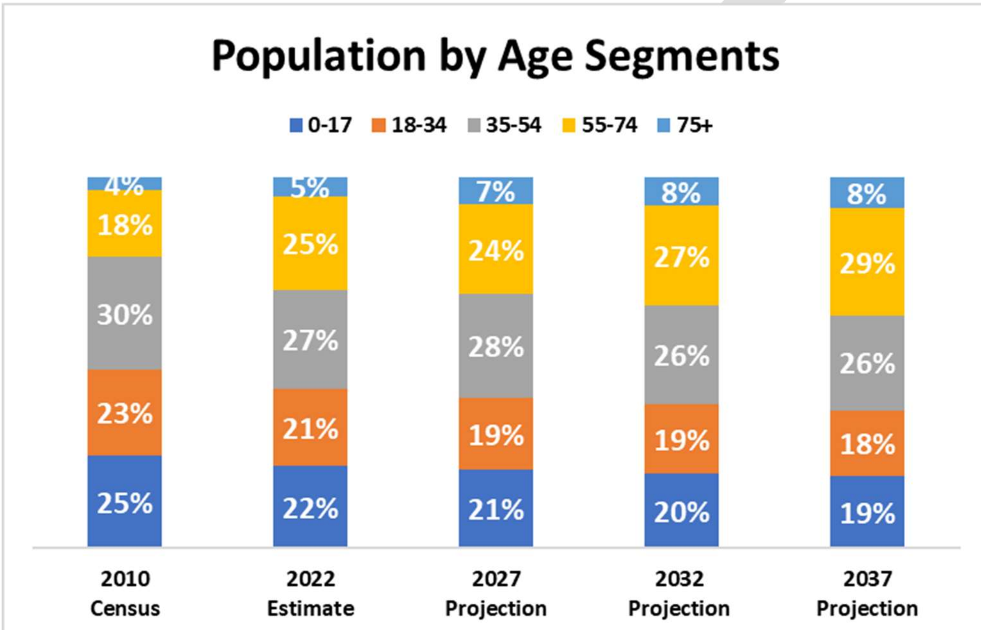


Figure 4: Population by Age Segments

RACE AND ETHNICITY DEFINITIONS

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

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

- Native Hawaiian or Other Pacific Islander – This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White – This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino – This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

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

RACE

Analyzing race, the District has become more diverse since the 2010 Census when 82% of the population was White Alone. The 2022 estimate shows that 67% of the population falls into the White Alone category, with Two or More Races (13%) representing the largest minority. The Black Alone population in the district is significantly lower than the national Black Alone population (13%). The predictions for 2037 expect the population to continue diversifying with the White Alone population decreasing, accompanied by increases to all other race categories. (**Figure 5)**

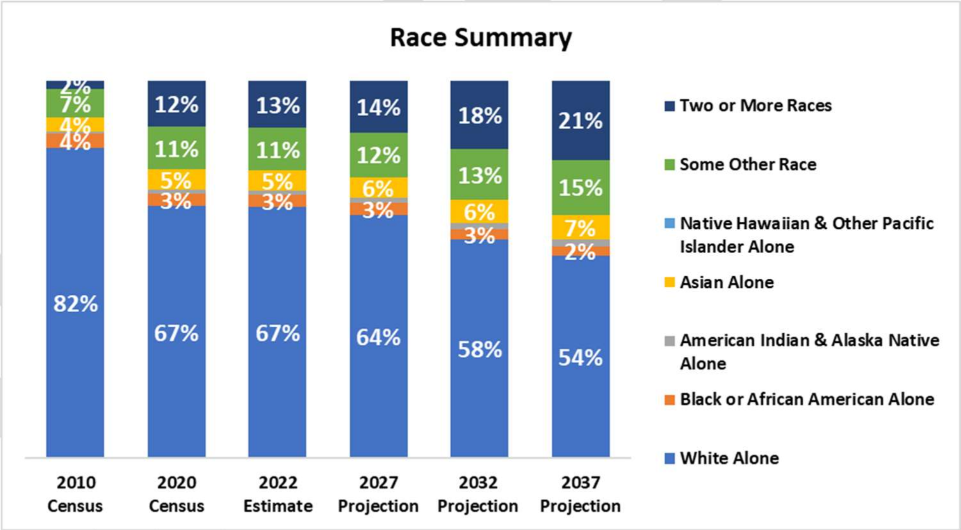


Figure 5: Race Summary

ETHNICITY

The District's population was also assessed based on Hispanic/Latino ethnicity, which by the Census Bureau definition is viewed independently from race. It is important to note that individuals who are Hispanic/Latino in ethnicity can also identify with any of the racial categories from **Figure 5**. Based on the 2020 Census, those of Hispanic/ Latino origin represent approximately 24% of the current population, which is more than the national average (19% Hispanic/Latino). The Hispanic/ Latino population is expected to continue growing over the next 15 years, increasing to 27% of the total population by 2037. (**Figure 6)**

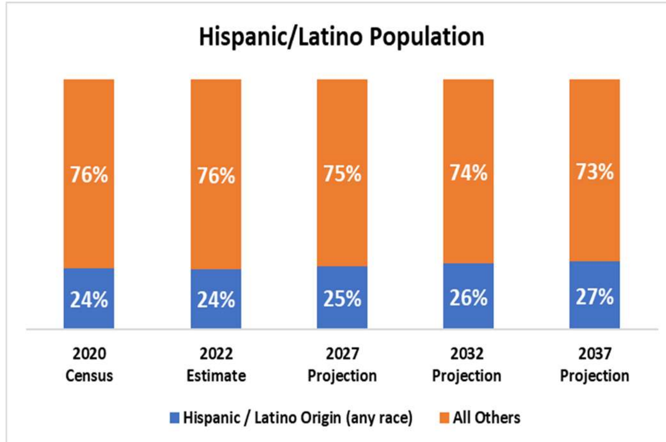


Figure 6: Hispanic/Latino Population

HOUSEHOLD INCOME

Figure 7 depicts the District's income characteristics showing the per capita income ($46,513) is below the state average ($49,811) and above the national average ($35,672) while the median household income ($100,635) is above the state average ($89,536) and significantly above the national average ($65,712).

Figure 7: Income Characteristics

1.2.4 DEMOGRAPHIC COMPARATIVE SUMMARY

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

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

2022 Demographic Comparison		Warrenville Park District	State of Illinois	U.S.A.
Population	Annual Growth Rate (2020-2022)	3.15%	-0.28%	0.74%
	Projected Annual Growth Rate (2022-2037)	0.63%	-0.12%	0.70%
Households	Annual Growth Rate (2020-2022)	3.27%	-0.05%	0.76%
	Average Household Size	2.68	2.51	2.58
Age Segment Distribution	Ages 0-17	22%	22%	22%
	Ages 18-34	21%	23%	23%
	Ages 35-54	27%	25%	25%
	Ages 55-74	25%	23%	23%
	Ages 75+	5%	7%	7%
Race Distribution	White Alone	66.6%	60.8%	69.2%
	Black Alone	3.1%	14.1%	13.0%
	American Indian	1.2%	0.8%	1.0%
	Asian	5.2%	6.0%	5.9%
	Pacific Islander	0.0%	0.0%	0.2%
	Some other Race	11.3%	9.0%	7.1%
	Two or More Races	12.5%	9.3%	3.6%
Hispanic/ Latino Population	Hispanic / Latino Origin (any race)	24.1%	18.5%	18.9%
	All Others	75.9%	81.5%	81.1%
Income Characteristics	Per Capita Income	$46,513	$42,710	$35,106
	Median Household Income	$100,635	$76,812	$64,730

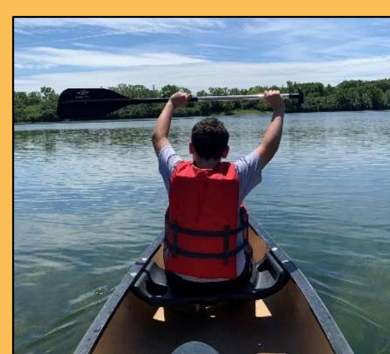
DEMOGRAPHIC SUMMARY

- The District's recent **population annual growth rate** (3.15%) is significantly higher than the national (0.74%) growth rate.
- The District's **household annual growth rate** (3.27%) is also significantly higher than the national (0.76%) average.
- When assessing **age segments**, the District exhibits an aging population.
- The District's **racial distribution** has a significantly higher Two or More Races population, when compared to national percentage distribution.
- District's percentage of **Hispanic/Latino population** (24%) is above the national average (18.9%) and is expected to increase slightly.
- The District's **per capita income** ($46,513) is below the state average and above the national average. Where the **median house income** ($100,635) is well above when compared to the state ($89,536) and national ($65,712) averages.

1.2.5 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 District.

- The District's aging trend may indicate the need to provide more programs and services for the 55+ population. Due to the continued growth of the older age segments, it may be useful to further segment the "Senior" population beyond the traditional 55+ designation. Within the field of parks and recreation, there are two commonly used ways to partition this age segment. One is to simply segment by age: 55-64, 65-74, and 75+. However, as these age segments are engaged in programming, the variability of health and wellness can be a more relevant factor. For example, a 55-year-old may be struggling with rheumatoid arthritis and need different recreational opportunities than a healthy 65-year-old who is an active tennis player competing in senior tournaments. Therefore, it may be more useful to divide this age segment into "Active," "Low-Impact," and/or "Social" Seniors.
- The District should ensure the community's diversity is reflected in marketing and communications outreach, program participation, and response rates when surveying the community. This will help ensure all community needs are being met.



1.3 RECREATIONAL TRENDS ANALYSIS

The Trends Analysis provides an understanding of national, and local recreational trends. Trends data used for this analysis was obtained from Sports & Fitness Industry Association's ("SFIA"), National Recreation and Park Association ("NRPA"), and ESRI. All trends data is based on current and/or historical participation rates or statistically-valid survey results.

1.3.1 NATIONAL TRENDS IN RECREATION

METHODOLOGY

The SFIA's *Sports, Fitness & Recreational Activities Topline Participation Report 2020* 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 2019 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 302,756,603 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 122 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 a given activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than causal 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.

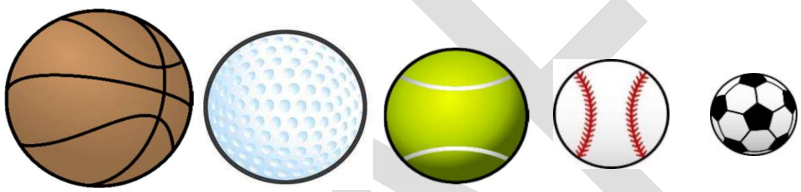
1.3.2 NATIONAL SPORT AND FITNESS PARTICIPATORY TRENDS

NATIONAL TRENDS IN GENERAL SPORTS

PARTICIPATION LEVELS

The sports most heavily participated in the United States were Basketball (24.9 million) and Golf (24.3 million), which have participation figures well in excess of the other activities within the general sports category. Followed by Tennis (17.7 million), Baseball (15.8 million), and Outdoor Soccer (11.9 million).

The popularity of Basketball, Golf, and Tennis can be attributed to the ability to compete with relatively small number of participants. Basketball's 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 the majority of American dwellings as a drive-way pickup game. Even though Golf has experienced a recent decrease in participation in the last 5-years, it still 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 (e.g. Top Golf) have increased drastically (84.7%) as a 5-year trend. The emergence of Golf Entertainment, such as Top Golf, has helped increase participation for golf as an activity outside of traditional golf course environments.



Basketball	Golf	Tennis	Baseball	Soccer
24.9 Million	24.3 Million	17.7 Million	15.8	11.9 Million

FIVE-YEAR TREND

Since 2014, Golf Entertainment Venues (84.7%), Pickleball (40.5%), and Flag Football (23.1%) have emerged as the overall fastest growing sports. During the last five-years. Similarly, Baseball (20.2%) and Indoor Soccer (17.8%) have also experienced significant growth. Based on the trend from 2014-2019, the sports that are most rapidly declining include Ultimate Frisbee (-49.4%), Squash (-23.4%), Touch Football (-21.5%), Badminton (-15.1%), and Tackle Football (-14.6%).

ONE-YEAR TREND

In general, the most recent year shares a similar pattern with the five-year trends; with Boxing for Competition (8.2%), Golf- Entertainment Venues (6.7%), and Pickleball (4.8%) experiencing the greatest increases in participation this past year. However, some sports that increased rapidly over the past five years have experienced recent decreases in participation, such as Rugby (-10.8%) and Gymnastics (-1.5%). Other sports including Ultimate Frisbee (-15.5%), Sand Volleyball (-7.8%), Roller Hockey (-6.8%), and Touch Football (-6.3) have also seen a significant decrease in participate over the last year.

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

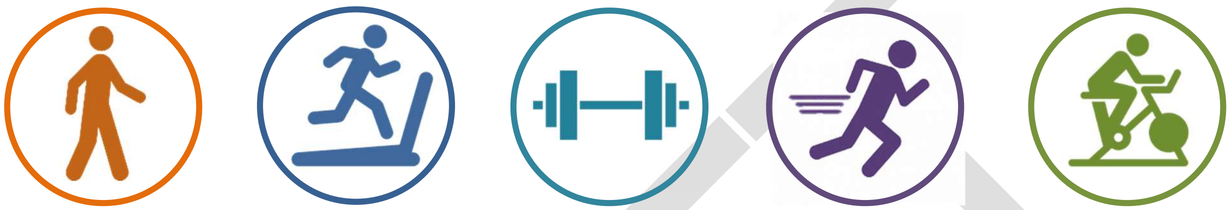
Highly participated in sports, such as Basketball, Baseball, and Slow Pitch Softball, have a larger core participant base (participate 13+ times per year) than casual participant base (participate 1-12 times per year). In the past year, Ice Hockey and Softball -Fast Pitch have increased core participation. While less mainstream sports, such as Boxing for Competition, Roller Hockey, Badminton, and Racquetball have larger casual participation base. These participants may be more inclined to switch to other sports or fitness activities. *Please see **Appendix D** for full Core vs. Casual Participation breakdown.*

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Basketball	23,067	24,225	24,917	8.0%	2.9%
Golf (9 or 18-Hole Course)	24,700	24,240	24,271	-1.7%	0.1%
Tennis	17,904	17,841	17,684	-1.2%	-0.9%
Baseball	13,152	15,877	15,804	20.2%	-0.5%
Soccer (Outdoor)	12,592	11,405	11,913	-5.4%	4.5%
Golf (Entertainment Venue)	5,362	9,279	9,905	84.7%	6.7%
Softball (Slow Pitch)	7,077	7,386	7,071	-0.1%	-4.3%
Football, (Flag)	5,508	6,572	6,783	23.1%	3.2%
Volleyball (Court)	6,304	6,317	6,487	2.9%	2.7%
Badminton	7,176	6,337	6,095	-15.1%	-3.8%
Soccer (Indoor)	4,530	5,233	5,336	17.8%	2.0%
Football, (Touch)	6,586	5,517	5,171	-21.5%	-6.3%
Football, (Tackle)	5,978	5,157	5,107	-14.6%	-1.0%
Gymnastics	4,621	4,770	4,699	1.7%	-1.5%
Volleyball (Sand/Beach)	4,651	4,770	4,400	-5.4%	-7.8%
Track and Field	4,105	4,143	4,139	0.8%	-0.1%
Cheerleading	3,456	3,841	3,752	8.6%	-2.3%
Pickleball	2,462	3,301	3,460	40.5%	4.8%
Racquetball	3,594	3,480	3,453	-3.9%	-0.8%
Ice Hockey	2,421	2,447	2,357	-2.6%	-3.7%
Ultimate Frisbee	4,530	2,710	2,290	-49.4%	-15.5%
Softball (Fast Pitch)	2,424	2,303	2,242	-7.5%	-2.6%
Lacrosse	2,011	2,098	2,115	5.2%	0.8%
Wrestling	1,891	1,908	1,944	2.8%	1.9%
Roller Hockey	1,736	1,734	1,616	-6.9%	-6.8%
Boxing for Competition	1,278	1,310	1,417	10.9%	8.2%
Rugby	1,276	1,560	1,392	9.1%	-10.8%
Squash	1,596	1,285	1,222	-23.4%	-4.9%
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%)	

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. These activities also have very few barriers to entry, which provides a variety of options that are relatively inexpensive to participate in and can be performed by most individuals. The most popular general fitness activities amongst the U.S. population include: Fitness Walking (111.4 million), Treadmill (56.8 million), Free Weights (51.4 million), Running/Jogging (49.5 million), and Stationary Cycling (37.1 million).



Fitness Walking 111.4 Million	Treadmill 56.8 Million	Dumbbell Free Weights 51.4 Million	Running/ Jogging 49.5 Million	Stationary Cycling 37.1 Million

FIVE-YEAR TREND

Over the last five years (2014-2019), the activities growing most rapidly are Trail Running (46.0%), Yoga (20.6%), Cross Training Style Workout (20.2%), and Stationary Group Cycling (17.5%). Over the same time frame, the activities that have undergone the biggest decline include: Traditional Triathlon (-9.2%), Running/Jogging (-8.7%), Free Weights (-8.3%), and Fitness Walking (-1.0%)

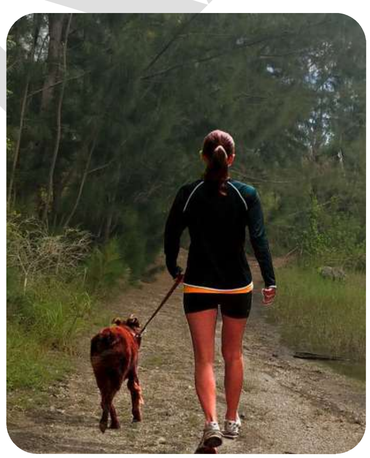
ONE-YEAR TREND

In the last year, activities with the largest gains in participation were Trail Running (9.9%), Dance, Step, & Choreographed Exercise (7.0%), and Yoga (6.0%). From 2018-2019, the activities that had the largest decline in participation were Traditional Triathlons (-7.7%), Non-Traditional Triathlon (-7.4%), Bodyweight Exercise (-2.8%), and Running/Jogging (-2.6%).

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

The most participated in fitness activities all have a strong core users base (participating 50+ times per year). These fitness activities include: Fitness Walking, Treadmill, Free Weights, Running/Jogging, Stationary Cycling, Weight/Resistant Machines, and Elliptical Motion/Cross Training, all having 48% or greater core users. *Please see* ***Appendix D*** *for full Core vs. Casual Participation breakdown.*

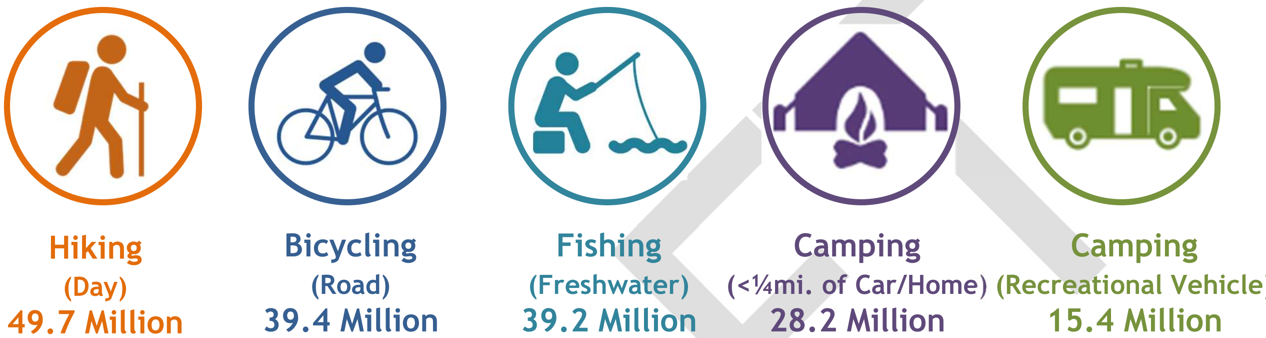
National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Fitness Walking	112,583	111,001	111,439	-1.0%	0.4%
Treadmill	50,241	53,737	56,823	13.1%	5.7%
Free Weights (Dumbbells/Hand Weights)	56,124	51,291	51,450	-8.3%	0.3%
Running/Jogging	54,188	50,770	49,459	-8.7%	-2.6%
Stationary Cycling (Recumbent/Upright)	35,693	36,668	37,085	3.9%	1.1%
Weight/Resistant Machines	35,841	36,372	36,181	0.9%	-0.5%
Elliptical Motion Trainer	31,826	33,238	33,056	3.9%	-0.5%
Yoga	25,262	28,745	30,456	20.6%	6.0%
Free Weights (Barbells)	25,623	27,834	28,379	10.8%	2.0%
Dance, Step, & Choreographed Exercise	21,455	22,391	23,957	11.7%	7.0%
Bodyweight Exercise	22,390	24,183	23,504	5.0%	-2.8%
Aerobics (High Impact/Intensity Training HIIT)	19,746	21,611	22,044	11.6%	2.0%
Stair Climbing Machine	13,216	15,025	15,359	16.2%	2.2%
Cross-Training Style Workout	11,265	13,338	13,542	20.2%	1.5%
Trail Running	7,531	10,010	10,997	46.0%	9.9%
Stationary Cycling (Group)	8,449	9,434	9,930	17.5%	5.3%
Pilates Training	8,504	9,084	9,243	8.7%	1.8%
Cardio Kickboxing	6,747	6,838	7,026	4.1%	2.7%
Boot Camp Style Cross-Training	6,774	6,695	6,830	0.8%	2.0%
Martial Arts	5,364	5,821	6,068	13.1%	4.2%
Boxing for Fitness	5,113	5,166	5,198	1.7%	0.6%
Tai Chi	3,446	3,761	3,793	10.1%	0.9%
Barre	3,200	3,532	3,665	14.5%	3.8%
Triathlon (Traditional/Road)	2,203	2,168	2,001	-9.2%	-7.7%
Triathlon (Non-Traditional/Off Road)	1,411	1,589	1,472	4.3%	-7.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	



NATIONAL TRENDS IN OUTDOOR RECREATION

PARTICIPATION LEVELS

Results from the SFIA report demonstrate a contrast of growth and decline in participation regarding outdoor/adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or within a group, and are not as limited by time constraints. In 2019, the most popular activities, in terms of total participants, from the outdoor/adventure recreation category include: Day Hiking (49.7 million), Road Bicycling (39.4 million), Freshwater Fishing (39.2 million), and Camping within ¼ mile of Vehicle/Home (28.2 million), and Recreational Vehicle Camping (15.4 million).



FIVE-YEAR TREND

From 2014-2019, BMX Bicycling (55.2%), Day Hiking (37.2%), Fly Fishing (20.1%), Salt Water Fishing (11.6%), and Mountain Bicycling (7.2%) have undergone the largest increases in participation. The five-year trend also shows activities such as In-Line Roller Skating (-20.5%), Archery (-11.7%), and Adventure Racing (-9.5%) experiencing the largest decreases in participation.

ONE-YEAR TREND

The one-year trend shows activities growing most rapidly being BMX Bicycling (6.1%), Day Hiking (3.8%), and Birdwatching (3.8%). Over the last year, activities that underwent the largest decreases in participation include: Climbing (-5.5%), In-Line Roller Skating (-4.4%), and Camping with a Recreation Vehicle (-3.5%).

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. This is likely why we see a lot of fluctuation in participation numbers, as the casual users likely found alternative activities to participate in. *Please see **Appendix D** for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Hiking (Day)	36,222	47,860	49,697	37.2%	3.8%
Bicycling (Road)	39,725	39,041	39,388	-0.8%	0.9%
Fishing (Freshwater)	37,821	38,998	39,185	3.6%	0.5%
Camping (< 1/4 Mile of Vehicle/Home)	28,660	27,416	28,183	-1.7%	2.8%
Camping (Recreational Vehicle)	14,633	15,980	15,426	5.4%	-3.5%
Fishing (Saltwater)	11,817	12,830	13,193	11.6%	2.8%
Birdwatching (>1/4 mile of Vehicle/Home)	13,179	12,344	12,817	-2.7%	3.8%
Backpacking Overnight	10,101	10,540	10,660	5.5%	1.1%
Bicycling (Mountain)	8,044	8,690	8,622	7.2%	-0.8%
Archery	8,435	7,654	7,449	-11.7%	-2.7%
Fishing (Fly)	5,842	6,939	7,014	20.1%	1.1%
Skateboarding	6,582	6,500	6,610	0.4%	1.7%
Roller Skating, In-Line	6,061	5,040	4,816	-20.5%	-4.4%
Bicycling (BMX)	2,350	3,439	3,648	55.2%	6.1%
Climbing (Traditional/Ice/Mountaineering)	2,457	2,541	2,400	-2.3%	-5.5%
Adventure Racing	2,368	2,215	2,143	-9.5%	-3.3%
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%)	

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 2019, Fitness Swimming was the absolute leader in overall participation (28.2 million) amongst aquatic activities, largely due to its broad, multigenerational appeal.

Swimming (Fitness) 28.2 Million

Aquatic Exercise 11.2 Million

Swimming (Competition) 2.8 Million

FIVE-YEAR TREND

Assessing the five-year trend, all aquatic activities have experienced growth. Aquatic Exercise stands out having increased (22.7%) from 2014-2019, most likely due to the ongoing research that demonstrates the activity's great therapeutic benefit, followed by Fitness Swimming (11.5%) and Competition Swimming (4.1%).

ONE-YEAR TREND

From 2018-2019, Competive Swimming (-7.3%) was the only aquatic activity that declined in particpation. While both Aquatic Exercise (6.4%) and Fitness swimming (2.3%) experienced increases when assessing their one-year trend.

CORE VS. CASUAL TRENDS IN AQUATICS

All aquatic activities have undergone increases in participation over the last five years, primarily due to large increases in casual participation (1-49 times per year). From 2014 to 2019, casual participants for Aquatic Exercise (35.7%), Competition Swimming (22.7%), and Fitness Swimming (18.4%) have all grown significantly. However, all core participation (50+ times per year) for aquatic activities have decreased over the last five-years. *Please see **Appendix D** for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Aquatics					
Activity	**Participation Levels**			**% Change**	
	2014	**2018**	**2019**	**5-Year Trend**	**1-Year Trend**
Swimming (Fitness)	25,304	27,575	28,219	11.5%	2.3%
Aquatic Exercise	9,122	10,518	11,189	22.7%	6.4%
Swimming (Competition)	2,710	3,045	2,822	4.1%	-7.3%
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%)	

NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

PARTICIPATION LEVELS

The most popular water sports / activities based on total participants in 2019 were Recreational Kayaking (11.4 million), Canoeing (8.9 million), and Snorkeling (7.7 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.

Kayaking 11.4 Million | **Canoeing 9.0 Million** | **Snorkeling 7.7 Million** | **Jet Skiing 5.1 Million** | **Sailing 3.6 Million**

FIVE-YEAR TREND

Over the last five years, Stand-Up Paddling (29.5%) and Recreational Kayaking (28.5%) were the fastest growing water activity, followed by White Water Kayaking (9.9%) and Surfing (8.9%). From 2014-2019, activities declining in participation most rapidly were Water Skiing (-20.1%), Jet Skiing (-19.6%), Scuba Diving (-13.7%), Wakeboarding (-12.7%), and Snorkeling (-12.5%).

ONE-YEAR TREND

Similarly, to the five-year trend, Recreational Kayaking (3.3%) and Stand-Up Paddling (3.2%) also had the greatest one-year growth in participation, from 2018-2019. Activities which experienced the largest decreases in participation in the most recent year include: Boardsailing/Windsurfing (-9.7%), Sea Kayaking (-5.5), and Water Skiing (-4.8%)

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 uncontrollable factors. These high causal user numbers are likely why a majority of water sports/activities have experienced decreases in participation in recent years. *Please see **Appendix D** for full Core vs. Casual Participation breakdown.*

National Participatory Trends - Water Sports / Activities					
Activity	Participation Levels			% Change	
	2014	2018	2019	5-Year Trend	1-Year Trend
Kayaking (Recreational)	8,855	11,017	11,382	28.5%	3.3%
Canoeing	10,044	9,129	8,995	-10.4%	-1.5%
Snorkeling	8,752	7,815	7,659	-12.5%	-2.0%
Jet Skiing	6,355	5,324	5,108	-19.6%	-4.1%
Sailing	3,924	3,754	3,618	-7.8%	-3.6%
Stand-Up Paddling	2,751	3,453	3,562	29.5%	3.2%
Rafting	3,781	3,404	3,438	-9.1%	1.0%
Water Skiing	4,007	3,363	3,203	-20.1%	-4.8%
Surfing	2,721	2,874	2,964	8.9%	3.1%
Wakeboarding	3,125	2,796	2,729	-12.7%	-2.4%
Scuba Diving	3,145	2,849	2,715	-13.7%	-4.7%
Kayaking (Sea/Touring)	2,912	2,805	2,652	-8.9%	-5.5%
Kayaking (White Water)	2,351	2,562	2,583	9.9%	0.8%
Boardsailing/Windsurfing	1,562	1,556	1,405	-10.1%	-9.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

1.3.3 LOCAL SPORT AND LEISURE MARKET POTENTIAL

MARKET POTENIAL INDEX (MPI)

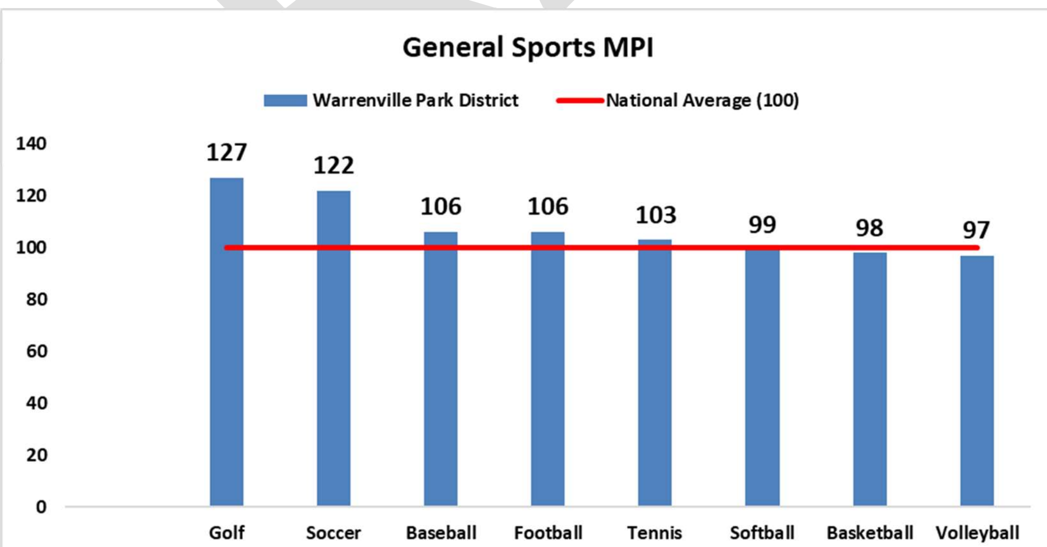
The following charts show sport and leisure market potential data for Warrenville Park District residents, as provided by ESRI. A Market Potential Index (MPI) measures the probable demand for a product or service within the defined service areas. The MPI shows the likelihood that an adult resident living within the District will participate in certain activities when compared to the U.S. national average. The national average is 100; therefore, numbers below 100 would represent lower than average participation rates, and numbers above 100 would represent higher than average participation rates. The 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.***

Overall, when analyzing the District's MPIs, the data demonstrates well above average market potential index (MPI) numbers. This is noticeable when only 10 out of 46 activities are slightly below the national average. These overall above average MPI scores show that the District residents have a rather strong participation presence when it comes to recreational offerings, especially pertaining to outdoor activities.

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

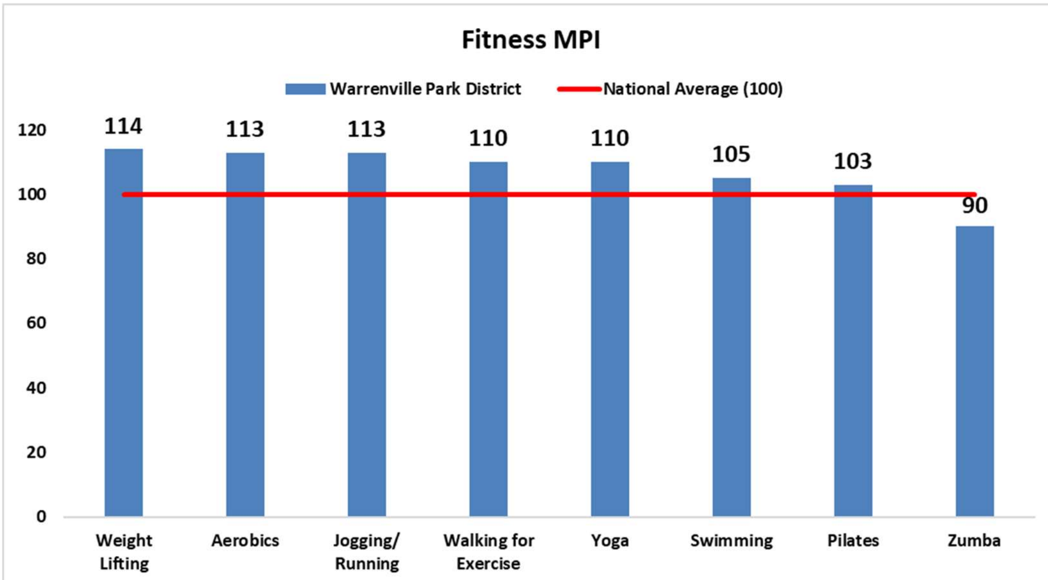
GENERAL SPORTS MARKET POTENTIAL

The General Sports MPI chart reveals that overall, the District's residents are most likely to participate when it comes to Golf (127), Soccer (122), Baseball and Football (106), and Tennis (103) when compared to the national average.



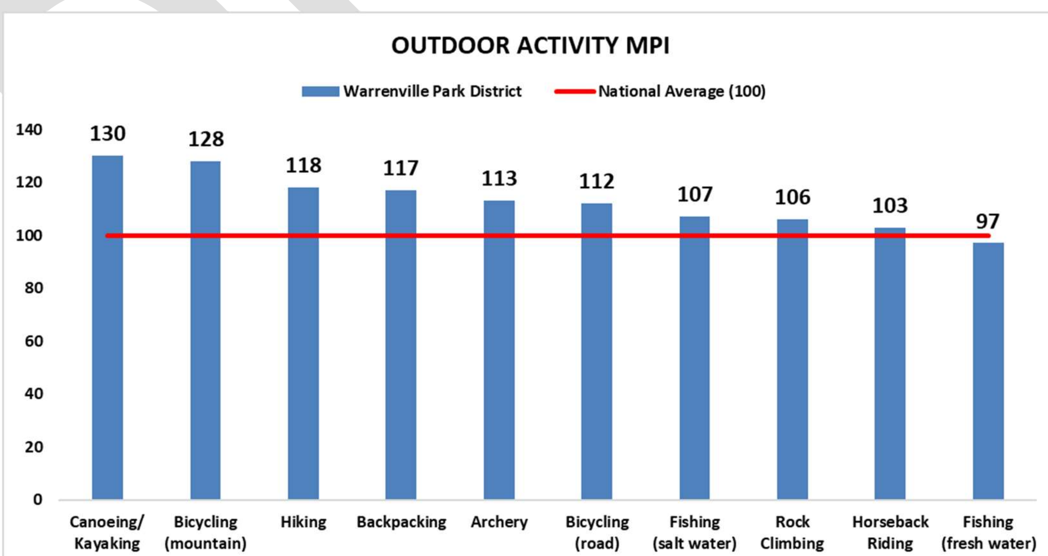
FITNESS MARKET POTENTIAL

Overall, the Fitness MPI chart reflects a health-oriented community where indoor facilities like, Fitness NOW, along with walk/run events help to keep people active year-round. The categories with the highest MPI are Weight Lifting (114), Aerobics and Jogging/Running (113), Walking for Exercise and Yoga (110), Swimming (105) and Pilates (103) with Zumba being the only activity below the national average (100).



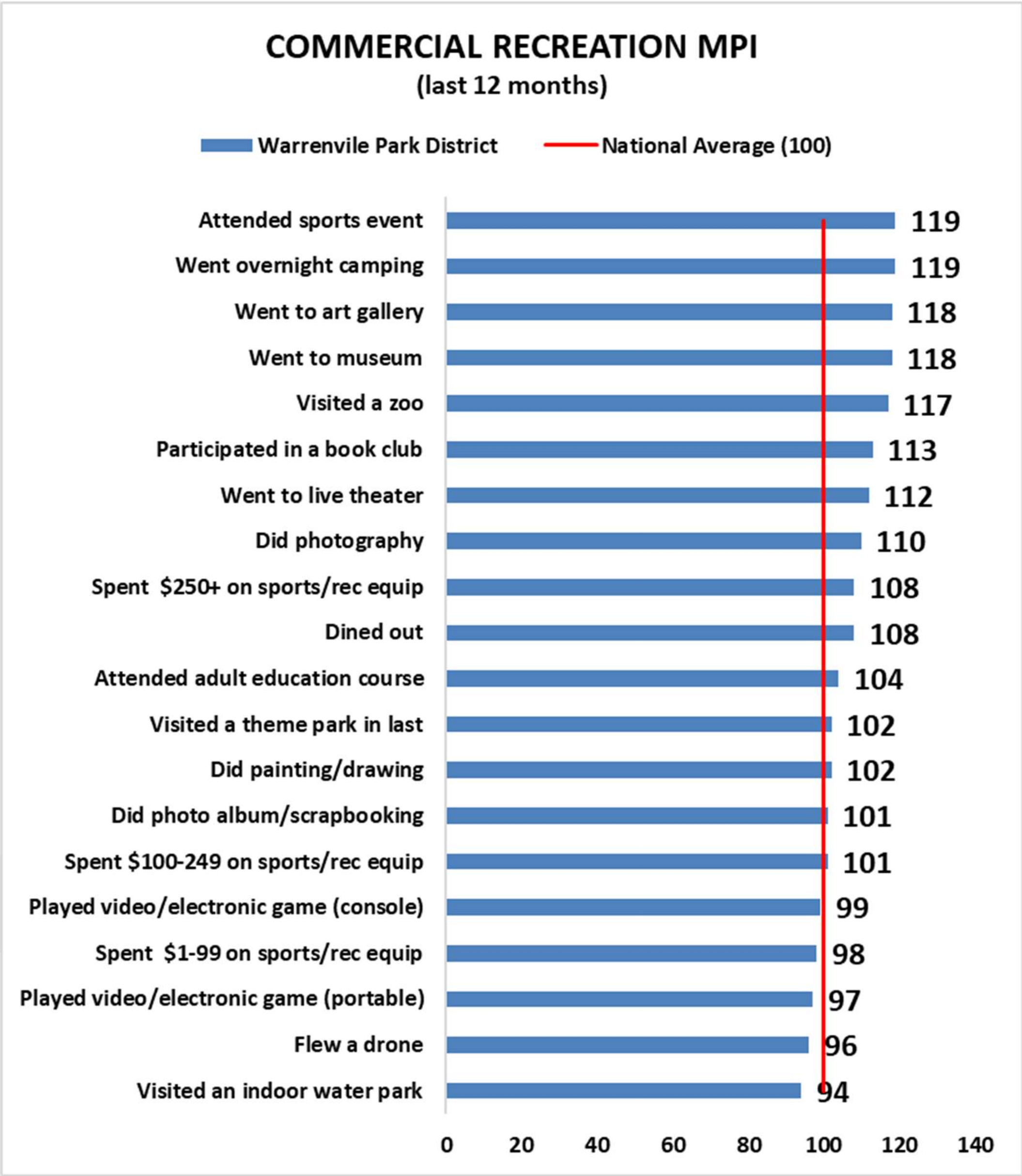
OUTDOOR ACTIVITY MARKET POTENTIAL

When analyzing **Outdoor Activity,** the highest totals of all four categories. Canoeing/Kayaking (130) top all MPI scores. This is followed closely by Mountain Bicycling (128). The remaining are Hiking (118), Backpacking (117), Archery (113), Road Bicycling (112), Salt Water Fishing (107), Rock Climbing (106) and Horseback Riding (103). Only Fresh Water Fishing is below the national average.



COMMERCIAL RECREATION MARKET POTENTIAL

The Commercial Recreation MPI chart shows Attended sports event (119), Went overnight camping (119), Went to art gallery (118), Went to museum (118) and Visited a zoo (117) as the top five activities among District residents when compared to the national average.



LOCAL RECREATION TRENDS SUMMARY

Overall, the District's residents demonstrate participation trends that have above average potential index numbers in all four categories analyzed (general sports, fitness, outdoor activity and commercial recreation). Activities of particular interest include:

- Participation in sports such as golf, soccer, baseball, football, and tennis.
- Fitness related programming in in all activities except Zumba.
- Outdoor activities are the greatest MPI scores of all categories. All activities, except fresh water fishing have above national average MPI scores.
- Residents spend money on attending sport events, camping, art galleries, museum, as well as visiting a zoo.

Moving forward, it will be important for the District to continue offering these recreational opportunities and seek out new programs for its residents. It will also be important to continue to partner with other organizations to help deliver services that align with resident needs.