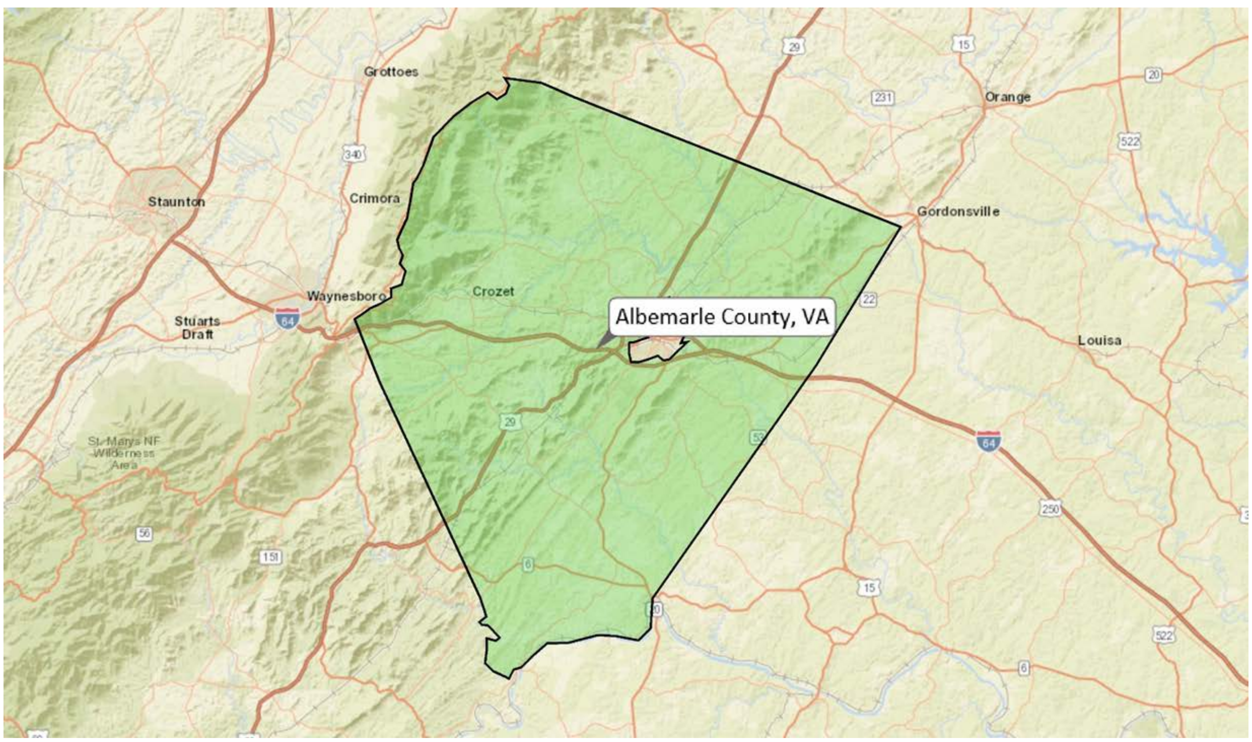
CHAPTER ONE - DEMOGRAPHIC ANALYSIS

The Demographic Analysis provides an understanding of the population of Albemarle County, Virginia. This analysis is reflective of the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

It is important to note that future projections are all based on historical patterns and unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

1.1 METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from 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 September 2017 and reflects actual numbers as reported in the 2010 Censuses, and estimates for 2017 and 2022 as obtained by ESRI. Straight line linear regression was utilized for projected 2027 and 2032 demographics. The County of Albemarle County boundaries utilized for the demographic analysis are shown below**.**



1.1.1 RACE AND ETHNICOUNTY DEFINITIONS

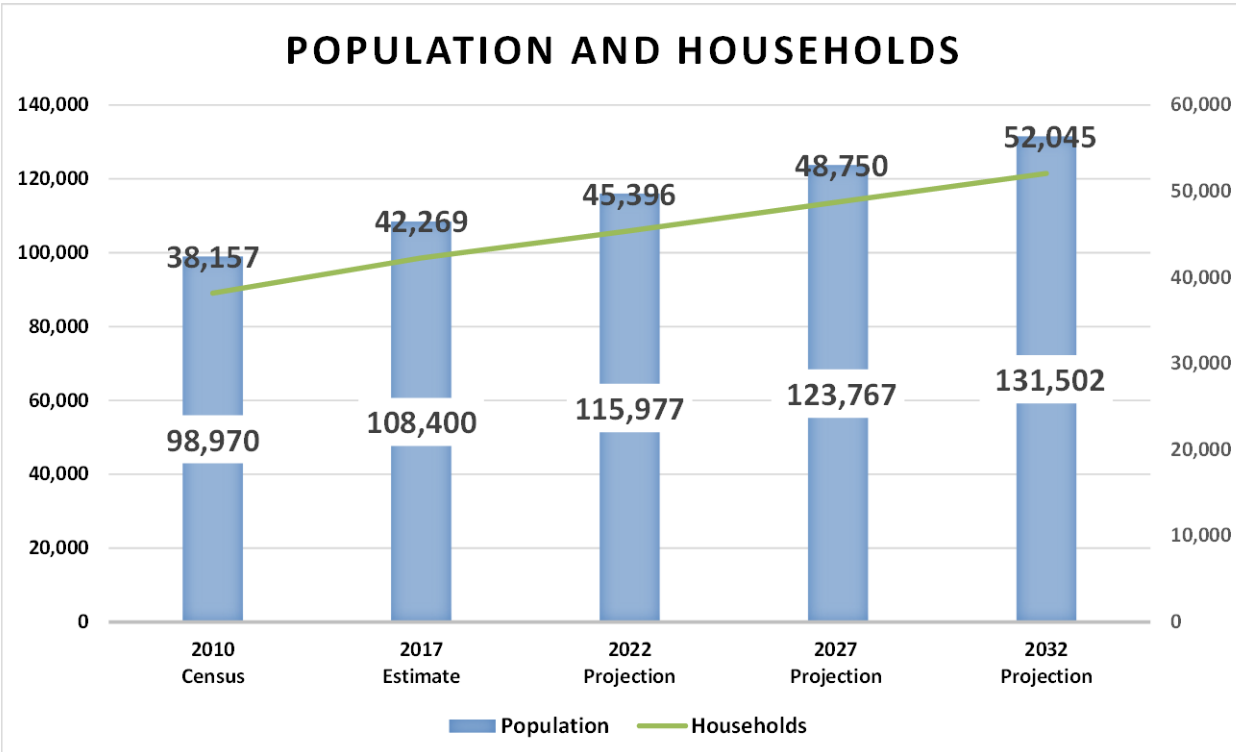
The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; caution must be used 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

1.2 ALBEMARLE COUNTY POPULACE

1.2.1 POPULATION

The County's population has experienced a growing trend in recent years and is currently estimated at 108,400 individuals. Projecting ahead, the total population is expected to continue to grow over the next 15 years. Based on predictions through 2032, the service area is expected to have 131,502 residents living within 52,045 households.

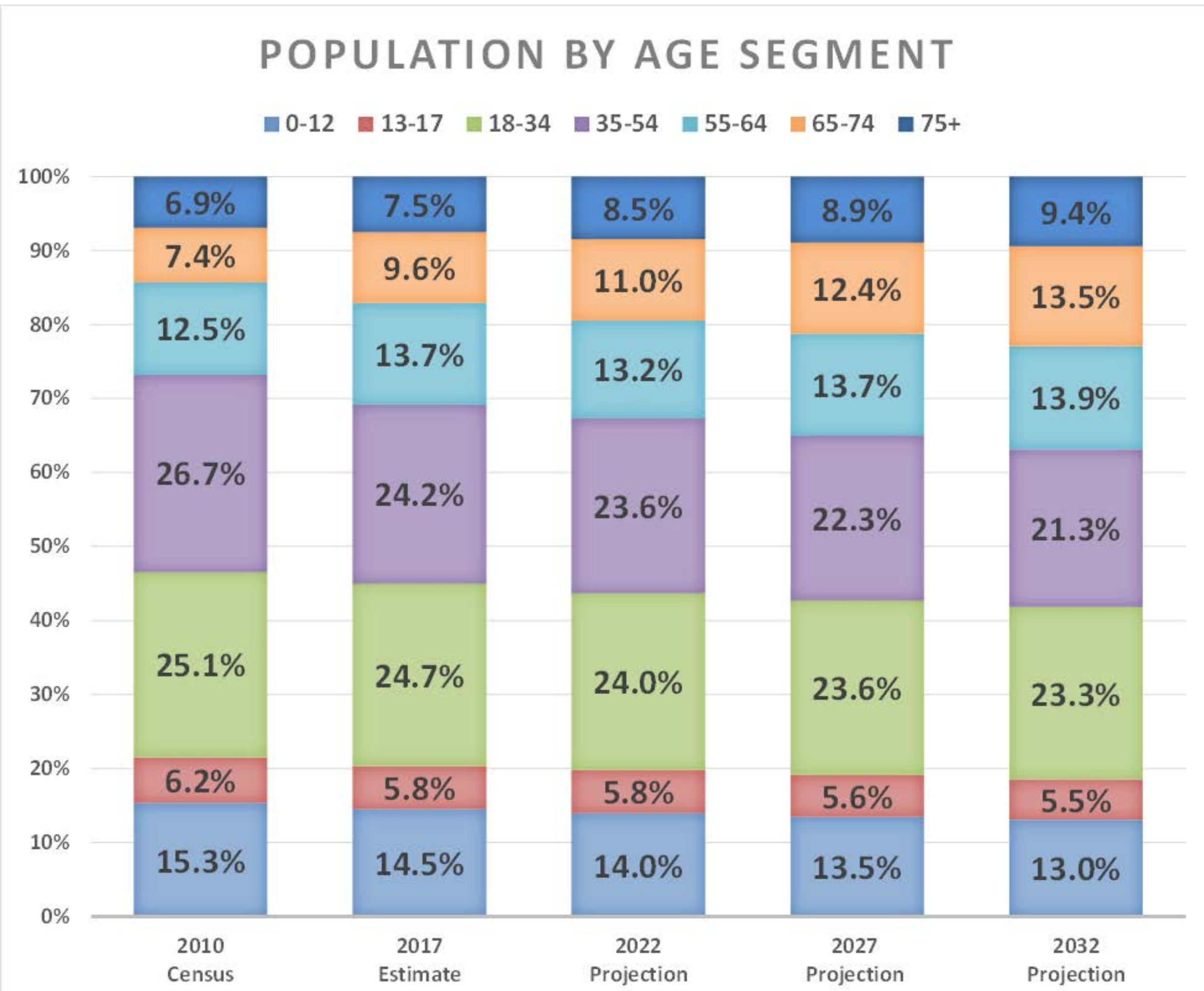


1.2.2 AGE SEGMENT

Evaluating the population by age segments, the service area exhibits a fairly balanced distribution among the major age segments. Currently, the largest age segment is the 55+, making up 30.8% of the population.

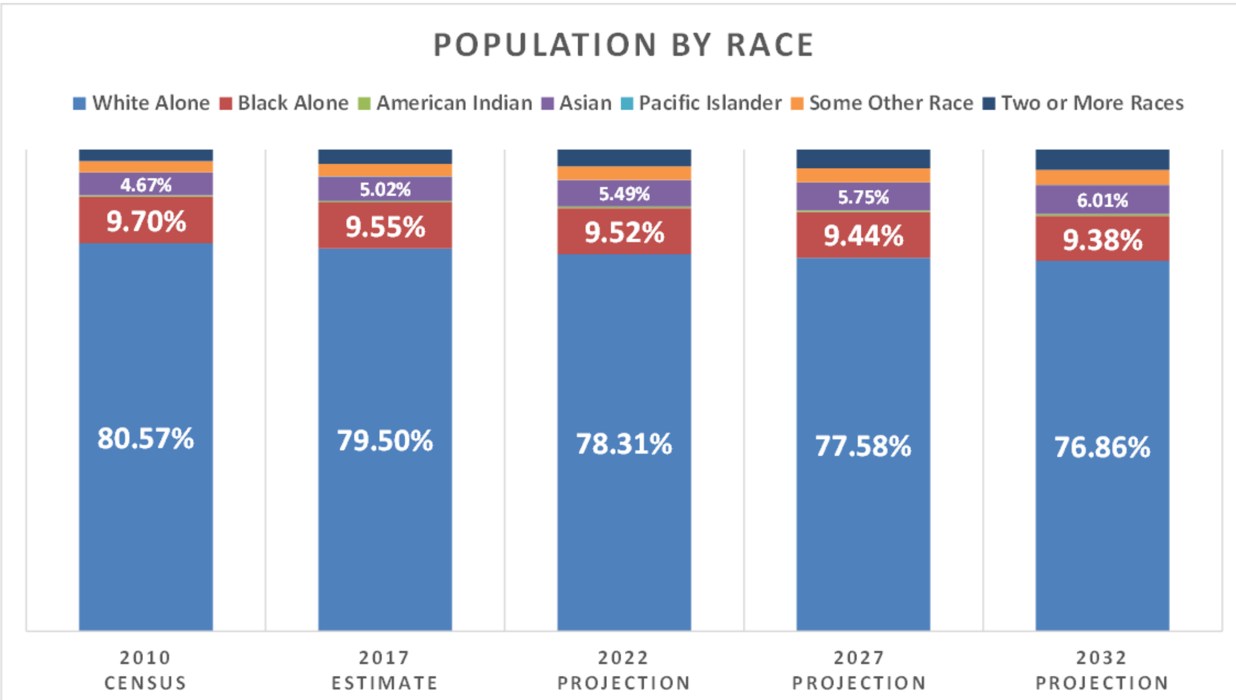
The overall age composition of the population within the County is projected to undergo an aging trend. While most of the younger age segments are expected to experience decreases in population percentage; those who are 55 and older are projected to continue increasing over the next 15 years, making up 36.8% of the population by 2032. This is assumed to be a consequence of a vast amount of the Baby Boomer generation shifting into the senior age segment**.**

Given the differences in how the active adults (55 and older) participate in recreation programs, the trend is moving toward having at least two to three different program age segments for older adults. When developing the park and recreation system, the County should evaluate recreation experiences that would cater to active adults who are 55-64, 65–74, and 75+ age segments.

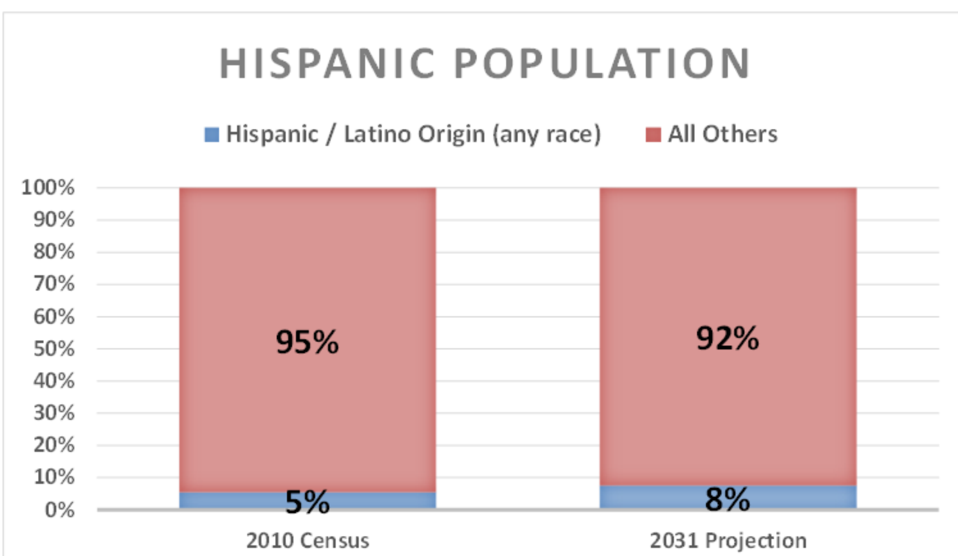


1.2.3 RACE AND ETHNICTY

In analyzing race, the service area's current populations are predominately White Alone. The 2017 estimates show that 79.5% of the service area's population falls into the White Alone category, while the Black Alone category (9.55%) represents the largest minority. The predictions for 2021 expect that the service area's population by race will stay relatively unchanged with the most growth occurring in the Asian segment.

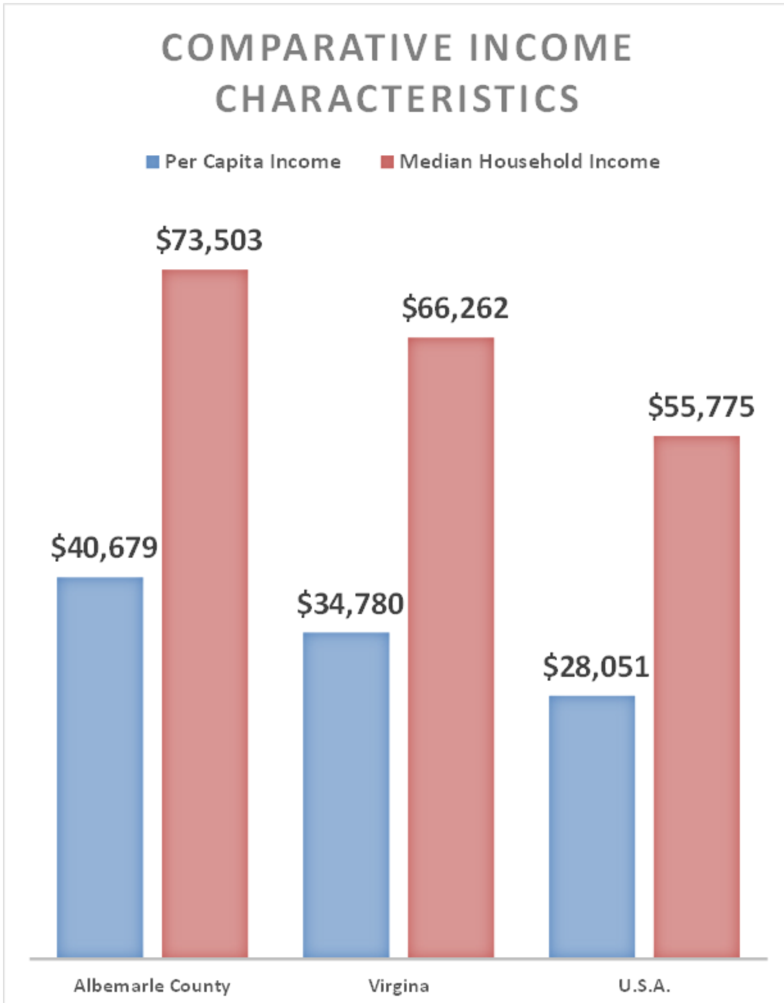


Based on the 2010 census, those of Hispanic/Latino origin represent 5% of the County's total population. The Hispanic/Latino population is expected to experience a slight increase to 8% by 2032**.**



1.2.4 HOUSEHOLDS AND INCOME

As seen in chart below, the County's per capita and median household income levels is well above state and national averages.



1.2.5 TAPESTRY SEGMENTATION

Tapestry segmentation provides an accurate, detailed description of Albemarle County's residents in which distinctive lifestyle segments are identified based on their socioeconomic and demographic composition.

Many jurisdictions have 10+ tapestry segments that make up the majority (50%+) of its population. Albemarle County has five segments that comprise 54% of its population. The five tapestry segments that make-up a majority of the County's population are illustrated in the chart below as well as how they compare to the United States.

Tapestry Segment	Percent of Albemarle County Households (2017)	Percent of US Households (2017)
Exurbanites	16.3%	1.9%
Soccer Moms	13.9%	2.9%
In Style	9.4%	2.2%
The Great Outdoors	7.4%	1.6%
Top Tier	7.0%	1.7%
Subtotal	**54.0%**	**10.2%**

Simply, the make-up of the Albemarle County is very unique. The tapestry segmentation data is useful information that can assist the department in better understanding the community that they serve.

The following provides a brief description of the five largest tapestry segments in Albemarle County.

EXURBANITES

Ten years later, Exurbanites residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts, but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane.

MEDIAN AGE: 50

MEDIAN HOUSEHOLD INCOME: $98,000

MARKET PROFILE:

- Exurbanites residents' preferred vehicles are late model luxury cars or SUVs.
- They are active supporters of the arts and public television/radio.
- Attentive to ingredients, they prefer natural or organic products.
- Gardening and home improvement are priorities, but they also use a number of services, from home care and maintenance to personal care.
- Financially active with wide-ranging investments, these investors rely on financial planners, extensive reading, and the Internet to handle their money.

SOCCER MOMS

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

MEDIAN AGE: 37

MEDIAN HOUSEHOLD INCOME: $84,000

MARKET PROFILE:

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

IN STYLE

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

MEDIAN AGE: 41

MEDIAN HOUSEHOLD INCOME: $66,000

MARKET PROFILE:

- Partial to late model SUVs or trucks.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, from a variety of investments to home equity lines of credit.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

THE GREAT OUTDOORS

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.

MEDIAN AGE: 46

MEDIAN HOUSEHOLD INCOME: $53,000

MARKET PROFILE:

- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping and entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

TOP TIER

The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers select upscale salons, spas, and fitness centers for their personal well-being and shop at high-end retailers for their personal effects. Whether short or long, domestic or foreign, their frequent vacations spare no expense. Residents fill their weekends and evenings with opera, classical music concerts, charity dinners, and shopping. These highly educated professionals have reached their corporate career goals. With an accumulated average net worth of over 1.5 million dollars and income from a strong investment portfolio, many of these older residents have moved into consulting roles or operate their own businesses.

MEDIAN AGE: 46

MEDIAN HOUSEHOLD INCOME: $157,000

MARKET PROFILE:

- They purchase or lease luxury cars with the latest trim, preferably imports.
- They contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.
- Top Tier residents farm out their household chores—every service from property and garden maintenance and professional housekeeping to contracting for home improvement or maintenance projects.
- Consumers spend money on themselves; they frequently visit day spas and salons, use dry cleaning services, and exercise at exclusive clubs.
- Near or far, downtown or at the beach, they regularly visit their lavish vacation homes.
- When at home, their schedules are packed with lunch dates, book club meetings, charity dinners, classical music concerts, opera shows, and visits to local art galleries.
- Top Tier consumers are shoppers. They shop at high-end retailers such as Nordstrom (readily
- paying full price), as well as Target, Kohl's, Macy's, and Bed Bath & Beyond, and online at Amazon.com.
- At their level of spending, it makes sense to own an airline credit card. They make several
- domestic and foreign trips a year for leisure and pay for every luxury along the way—a room with a view, limousines, and rental cars are part of the package.

ALBEMARLE COUNTY DEMOGRAPHIC IMPLICATIONS

The following implications are derived from the analyses provided above. Each implication is organized by the outlined demographic information sections.

POPULATION

The population is significantly increasing and is projected to experience 21% population growth over the next 15 years. With a growing population, park and recreation services must continue to grow to keep up with the population. Additionally, development will continue over the next 15 years and the parks and recreation system will need to strategically invest, develop, and maintain parks and facilities in relation to current and future housing development areas.

AGE SEGMENTATION

Albemarle County has a very broad age segmentation with the largest group being 55+ with the second largest group being 18-34. This is significant as providing access to services and programs will need to be focused on multitude of age segments simultaneously and equally challenging as age segments have different likings towards activities. Equal distribution across all age segments will require the County to continue to provide programs, services, parks and facilities that appeal to all residents of the community.

RACE AND ETHNICITY

A slightly diversifying population will likely focus the County on providing traditional and non-traditional programming and service offerings while always seeking to identify emerging activities and sports

HOUSEHOLDS AND INCOME

With a median and per capita household income above the state and national averages, it would be important for the County to prioritize providing offerings that are first class with exceptional customer service while seeking opportunities to create revenue generation.

TAPESTRY SEGMENTATION

Highly unique tapestry segmentation with above average income levels and diverse recreational needs.

NATIONAL TRENDS ANALYSIS

The following tables summarize the findings from the Sports & Fitness Industry Association's (SFIA) 2016 Sports, Fitness and Leisure Activities Topline Participation Report, as well as the local market potential index data, which compares the demand for recreational activities and spending of residents for the targeted area to the national averages.

Summary of National Participatory Trends Analysis
1. Number of "inactives" decreased slightly, those 'active to a healthy level' on the rise a. **"Inactives" down 0.6% in 2015, from 82.7 million to 81.6 million** b. **Approximately one-third of Americans (ages 6+) are active to a healthy level**
2. Most popular sport and recreational activities a. **Fitness Walking (109.8 million)** b. **Treadmill (50.4 million)** c. **Running/Jogging (48.5 million)**
3. Most participated in team sports a. **Golf (24.1 million)** b. **Basketball (23.4 million)** c. **Tennis (18 million)**
4. Activities most rapidly growing over last five years a. **Adventure Racing – up 136%** b. **Non-traditional/Off-road Triathlon – up 119%** c. **Squash – up 66%** d. **Trail Running – up 63%**
5. Activities most rapidly declining over last five years a. **In-line Roller Skating – down 30%** b. **Touch Football – down 25%** c. **Wrestling – down 22%** d. **Slow-pitch Softball – down 16%**

1.3 OVERVIEW OF NATIONAL PARTICIPATORY TRENDS

Information released by Sports & Fitness Industry Association's (SFIA) 2016 Study of Sports, Fitness, and Leisure Activities Topline Participation Report reveals that the most popular sport and recreational activities include: fitness walking, treadmill, running/jogging, free weights, and road bicycling. Most of these activities appeal to both young and old alike, can be done in most environments, are enjoyed regardless of level of skill, and have minimal economic barriers to entry. These popular activities also have appeal because of their social application. For example, although fitness activities are mainly self-directed, people enjoy walking and biking with other individuals because it can offer a degree of camaraderie.

Fitness walking has remained the most popular activity of the past decade by a large margin, in terms of total participants. Fitness walking participation last year was reported to be roughly 109.8 million Americans. Although fitness walking has the highest level of participation, it did report a 2.4% decrease in 2015 from the previous year. This recent decline in fitness walking participation paired with upward trends in a wide variety of other activities, especially in fitness and sports, suggests that active individuals are finding new ways to exercise and diversifying their recreational interests. In addition, the popularity of many outdoor adventure and water-based activities has experienced positive growth based on the most recent findings; however, many of these activities' rapid increase in participation is likely a product of their relatively low user base, which may indicate that these sharp upward trends may not be sustained long into the future.

From a traditional team sport standpoint, basketball ranks highest among all sports, with approximately 23.4 million people reportedly participating in 2015. In general, nearly every sport with available data experienced an increase in participation, which is a reversal from the five-year trend of declining participation in sports. Sports that have experienced significant growth in participation are squash, boxing, lacrosse, rugby, roller hockey, and field hockey – all of which have experienced growth in excess of 30% over the last five years. More recently, roller hockey, racquetball, indoor soccer, boxing, and flag football were the activities with the most rapid growth during the last year.

According to the Physical Activity Council, an "inactive" is defined as an individual that doesn't take part in any physical activity. Over the last five years, the number of inactive individuals has increased 7.4% from 76 million in 2010 to 81.6 million in 2015. However, looking at just the past year, from 2014 to 2015, the US saw a slight decrease of 0.6% from 82.7 to 81.6 million individuals. Although this recent shift is very promising, inactivity remains a dominant force in society, evidenced by the fact that 27.7% of the population falls into this category.

The Sports & Fitness Industry Association (SFIA) Sports, Fitness & Recreational Activities Topline Participation Report 2016 was utilized to evaluate national sport and fitness participatory trends. The study is based survey findings by the Physical Activity Council from a total of 32,658 online interviews carried out in 2015. The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the US.

1.4 NATIONAL TRENDS IN GENERAL SPORTS

The most heavily participated in sports for 2015 were golf (24.1 million) and basketball (23.4 million), which have participation figures well in excess of the other activities in the general sports category. The popularity of golf and basketball can be attributed to the ability to compete with relatively small number of participants. Golf also benefits from its wide age segment appeal, and is considered a life-long sport. Basketball's success can be attributed to the limited amount of equipment needed to participate and the limited space requirements necessary, which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game.

As seen in the chart below**,** since 2010, squash and other niche sports, like boxing, lacrosse and rugby, have seen strong growth. Squash has emerged as the overall fastest growing sport, as it has seen participation levels rise by 66% over the last five years. Based on the five-year trend, boxing (59%), rugby (44%), lacrosse (47%), roller hockey (39%), and field hockey (32%) have also experienced significant growth. In the most recent year, the fastest growing sports were roller hockey (10%), racquetball (8%), squash (7%), indoor soccer (6%), and boxing (6%). During the last five years, the sports that are most rapidly declining in participation numbers include touch football (-25%), wrestling (-22%), slow pitch softball (-16%), and racquetball (-16%).

Overall, activities in the general sports categories show very promising growth in the most recent year. Only three activities experienced a dip in participation, none of which declined by more than 3%. In general, the strong recent growth in sports is a reversal of the five-year trends, as nearly every activity declining in the long run has tipped the scale to show positive growth in the past year.

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2010	2014	2015	10-15	14-15
Golf	26,122	24,700	24,120	-7.7%	-2.3%
Basketball	25,156	23,067	23,410	-6.9%	1.5%
Tennis	18,719	17,904	17,963	-4.0%	0.3%
Baseball	14,198	13,152	13,711	-3.4%	4.3%
Soccer (Outdoor)	13,883	12,592	12,646	-8.9%	0.4%
Badminton	7,645	7,176	7,198	-5.8%	0.3%
Softball (Slow Pitch)	8,477	7,077	7,114	-16.1%	0.5%
Football, Touch	8,663	6,586	6,487	-25.1%	-1.5%
Volleyball (Court)	7,315	6,304	6,423	-12.2%	1.9%
Football, Tackle	6,850	5,978	6,222	-9.2%	4.1%
Football, Flag	6,660	5,508	5,829	-12.5%	5.8%
Soccer (Indoor)	4,920	4,530	4,813	-2.2%	6.2%
Volleyball (Sand/Beach)	4,752	4,651	4,785	0.7%	2.9%
Gymnastics	4,418	4,621	4,679	5.9%	1.3%
Ultimate Frisbee	4,571	4,530	4,409	-3.5%	-2.7%
Track and Field	4,383	4,105	4,222	-3.7%	2.9%
Racquetball	4,603	3,594	3,883	-15.6%	8.0%
Cheerleading	3,134	3,456	3,608	15.1%	4.4%
Ice Hockey	2,140	2,421	2,546	19.0%	5.2%
Pickleball	N/A	2,462	2,506	N/A	1.8%
Softball (Fast Pitch)	2,513	2,424	2,460	-2.1%	1.5%
Lacrosse	1,423	2,011	2,094	47.2%	4.1%
Wrestling	2,536	1,891	1,978	-22.0%	4.6%
Roller Hockey	1,374	1,736	1,907	38.8%	9.9%
Squash	1,031	1,596	1,710	65.9%	7.1%
Field Hockey	1,182	1,557	1,565	32.4%	0.5%
Boxing for Competition	855	1,278	1,355	58.5%	6.0%
Rugby	940	1,276	1,349	43.5%	5.7%
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%)	

1.5 NATIONAL TRENDS IN AQUATIC ACTIVITY

Swimming is unquestionably a lifetime sport, and all aquatic activities have experienced participation growth among the American population. In 2015, fitness swimming is the absolute leader in overall participation (26.3 million) for aquatic activities, due in large part to its broad, multigenerational appeal. In the most recent year, competition swimming reported the strongest growth (7%) among aquatic activities, followed by fitness swimming (4%) and aquatic exercise (1%). It should be noted, in 2011, recreational swimming was broken into competition and fitness categories in order to better identify key trends.

Aquatic Exercise also has a strong participation base, and has experienced steady growth since 2010. Aquatic exercise has paved the way as a less stressful form of physical activity, while allowing similar benefits as land based exercises, including aerobic fitness, resistance training, flexibility, and better balance. Doctors are now recommending aquatic exercise for injury rehabilitation, mature patients, and patients with bone or joint problems, due to the significant reduction of stress placed on weight-bearing joints, bones, muscles, and also the effect of the water in reducing swelling from injuries.

National Participatory Trends - Aquatics					
Activity	**Participation Levels**			**% Change**	
	2010	**2014**	**2015**	**10-15**	**14-15**
Swimming (Fitness)	N/A	25,304	26,319	N/A	4.0%
Aquatic Exercise	8,947	9,122	9,226	3.1%	1.1%
Swimming (Competition)	N/A	2,710	2,892	N/A	6.7%
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%)	

1.6 NATIONAL TRENDS IN GENERAL FITNESS

Overall, national participatory trends in fitness have experienced strong growth in recent years. Many of these activities have become popular due to an increased interest among people to improve their health 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 nearly anyone with no time restrictions.

The most popular fitness activity by far is fitness walking, which had just over 109.8 million participants in 2015, which represents a 2.4% decrease from the previous year. Other leading fitness activities based on total number of participants include treadmill (50.4 million), running/jogging (48.5 million), hand weights (42.8 million), stretching (35.8 million), and stationary cycling (35.6 million).

Over the last five years, the activities growing most rapidly are non-traditional / off-road triathlons (119%), trail running (63%), traditional road triathlons (57%), high impact aerobics (41%), and yoga (20%). In the last year, activities with the largest gains in participation included non-traditional / off-road triathlons (24%), traditional / road triathlons (13%), barre (12%), and trail running (8%). It should be noted that many of the activities growing most rapidly have a relatively low user base, which allows for more drastic shifts in terms of percentage. The recent decline in the extremely popular activities of fitness walking and running / jogging paired with widespread growth in activities with lower participation levels, may suggest that those engaging in fitness activities are actively looking for new forms of exercise.

National Participatory Trends - General Fitness

Activity	Participation Levels			% Change	
	2010	2014	2015	10-15	14-15
Fitness Walking	112,082	112,583	109,829	-2.0%	-2.4%
Treadmill	52,275	50,241	50,398	-3.6%	0.3%
Running/Jogging	46,650	51,127	48,496	4.0%	-5.1%
Free Weights (Hand Weights) under 15 lbs	N/A	41,670	42,799	N/A	2.7%
Stretching	35,720	35,624	35,776	0.2%	0.4%
Stationary Cycling (Recumbent/Upright)	36,036	35,693	35,553	-1.3%	-0.4%
Weight/Resistant Machines	39,185	35,841	35,310	-9.9%	-1.5%
Free Weights (Dumbells) over 15 lbs	N/A	30,767	31,409	N/A	2.1%
Elliptical Motion Trainer	27,319	28,025	27,981	2.4%	-0.2%
Free Weights (Barbells)	27,194	25,623	25,381	-6.7%	-0.9%
Yoga	20,998	25,262	25,289	20.4%	0.1%
Calisthenics/Bodyweight Exercise	N/A	22,390	22,146	N/A	-1.1%
Choreographed Exercise	N/A	21,455	21,487	N/A	0.1%
Aerobics (High Impact)	14,567	19,746	20,464	40.5%	3.6%
Stair Climbing Machine	13,269	13,216	13,234	-0.3%	0.1%
Cross-Training Style Workout	N/A	11,265	11,710	N/A	4.0%
Stationary Cycling (Group)	7,854	8,449	8,677	10.5%	2.7%
Pilates Training	8,404	8,504	8,594	2.3%	1.1%
Trail Running	4,985	7,531	8,139	63.3%	8.1%
Cardio Cross Trainer	N/A	7,484	7,982	N/A	6.7%
Boot Camp Style Cross-Training	N/A	6,774	6,722	N/A	-0.8%
Cardio Kickboxing	6,287	6,747	6,708	6.7%	-0.6%
Martial Arts	6,002	5,364	5,507	-8.2%	2.7%
Boxing for Fitness	4,788	5,113	5,419	N/A	6.0%
Tai Chi	3,193	3,446	3,651	14.3%	5.9%
Barre	N/A	3,200	3,583	N/A	12.0%
Triathlon (Traditional/Road)	1,593	2,203	2,498	56.8%	13.4%
Triathlon (Non-Traditional/Off Road)	798	1,411	1,744	118.5%	23.6%
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%)	

1.7 NATIONAL TRENDS IN OUTDOOR RECREATION

Results from the Participation Report demonstrate a dichotomy of growth and attrition among outdoor / adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or with a group, and are not limited by time restraints. In 2015, the most popular activities, in terms of total participants, from the outdoor / adventure recreation category include road bicycling (38.3 million), freshwater fishing (37.7 million), day hiking (37.2 million), and Camping within ¼ mile of vehicle/home (27.7 million).

From 2010-2015, outdoor / adventure recreation activities that have undergone the largest increases were adventure racing (136%), archery (33%), BMX bicycling (29%), traditional climbing (28%), and backpacking overnight (26%). Over the same time frame, activities declining most rapidly were in-line roller skating (-26%), camping within ¼ mile of home/vehicle (-15%), and recreational vehicle camping (-12%). More recently, activities growing most rapidly in the last year were adventure racing (21%), BMX bicycling (15%), traditional climbing (5%), and fly fishing (4%).

National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2010	2014	2015	10-15	14-15
Bicycling (Road)	39,730	39,725	38,280	-3.6%	-3.6%
Fishing (Freshwater)	39,911	37,821	37,682	-5.6%	-0.4%
Hiking (Day)	32,534	36,222	37,232	14.4%	2.8%
Camping (< 1/4 Mile of Vehicle/Home)	32,667	28,660	27,742	-15.1%	-3.2%
Wildlife Viewing (>1/4 Mile of Home/Vehicle)	21,158	21,110	20,718	-2.1%	-1.9%
Camping (Recreational Vehicle)	16,651	14,633	14,699	-11.7%	0.5%
Birdwatching (>1/4 mile of Vehicle/Home)	13,317	13,179	13,093	-1.7%	-0.7%
Fishing (Saltwater)	12,056	11,817	11,975	-0.7%	1.3%
Backpacking Overnight	7,998	10,101	10,100	26.3%	0.0%
Archery	6,323	8,435	8,378	32.5%	-0.7%
Bicycling (Mountain)	7,152	8,044	8,316	16.3%	3.4%
Skateboarding	7,080	6,582	6,436	-9.1%	-2.2%
Fishing (Fly)	5,523	5,842	6,089	10.2%	4.2%
Roller Skating, In-Line	8,128	6,061	6,024	-25.9%	-0.6%
Climbing (Sport/Indoor/Boulder)	4,542	4,536	4,684	3.1%	3.3%
Adventure Racing	1,214	2,368	2,864	135.9%	20.9%
Bicycling (BMX)	2,090	2,350	2,690	28.7%	14.5%
Climbing (Traditional/Ice/Mountaineering)	2,017	2,457	2,571	27.5%	4.6%
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%)	

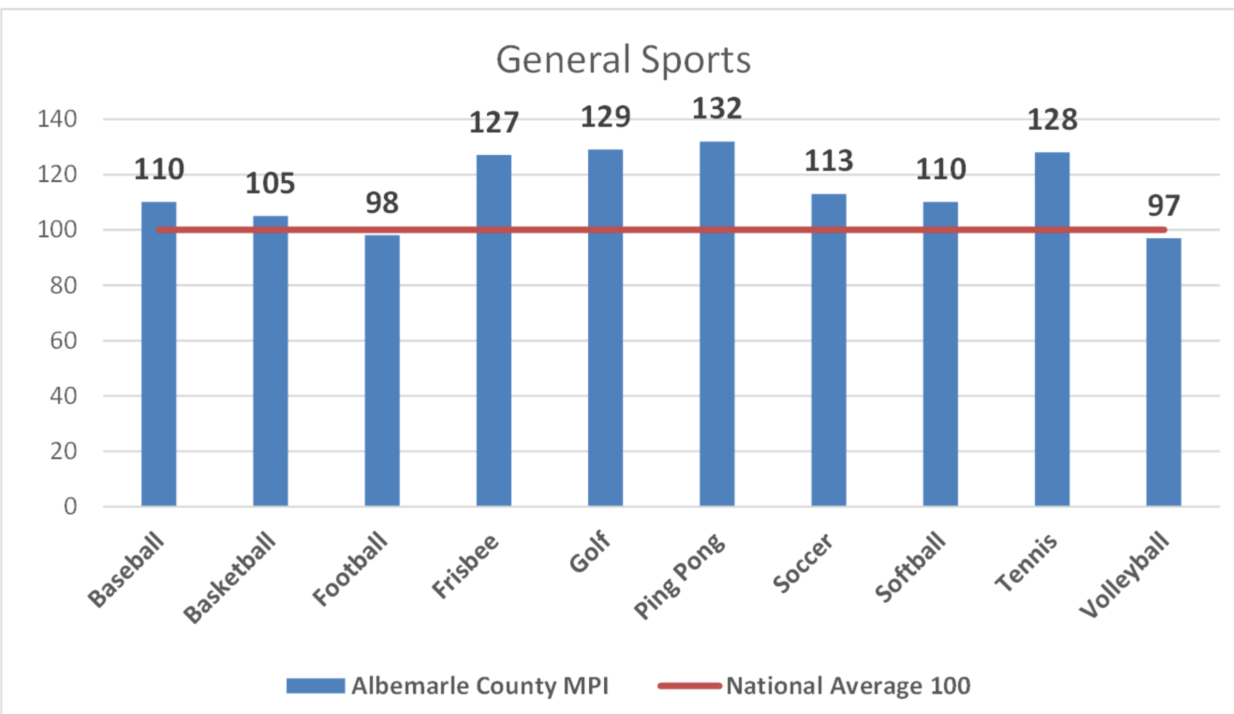
1.8 LOCAL SPORT AND MARKET POTENTIAL

The following charts show sport and leisure market potential data from ESRI. A Market Potential Data (MPI) measures the probable demand for a product or service within the County and its surrounding service area. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the US National average. The national average is 100, therefore numbers below 100 would represent a lower than average participation rate, and numbers above 100 would represent higher than average participation rate. The service area is compared to the national average in three (3) categories – general sports, fitness and outdoor activity.

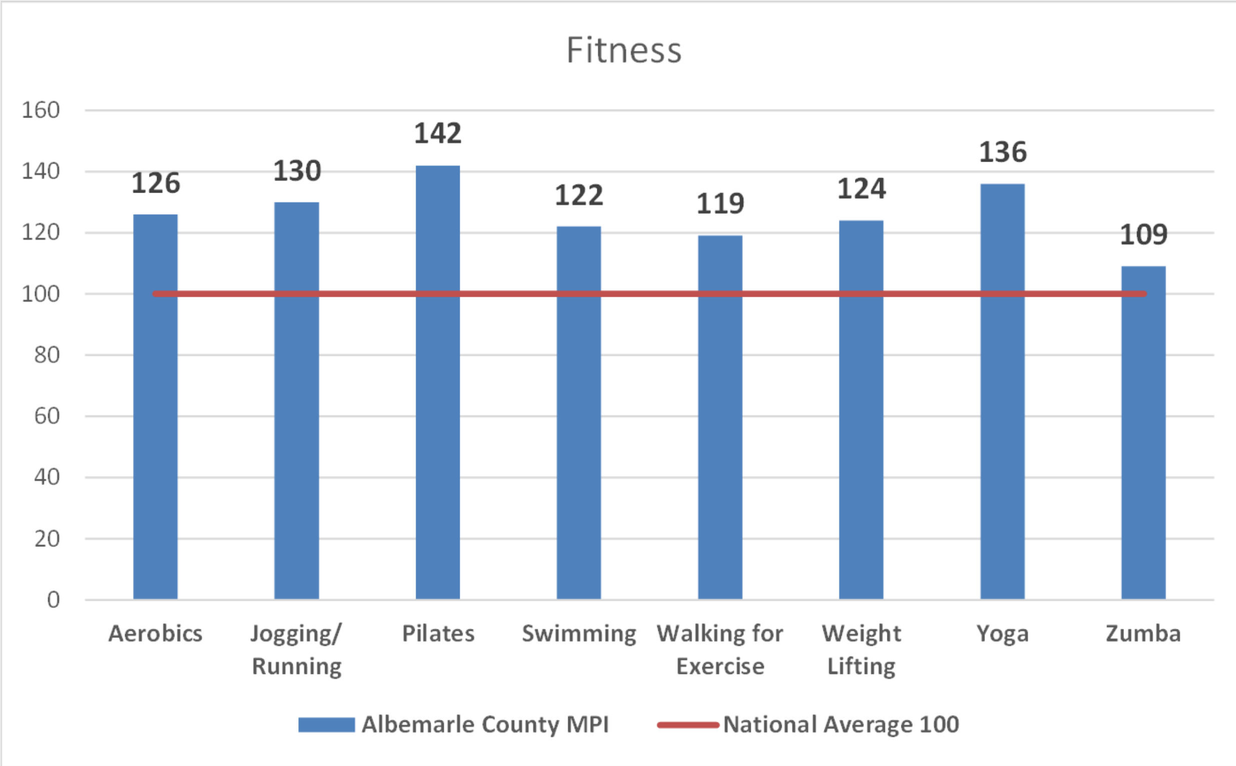
Overall, Albemarle County demonstrate rather high market potential index (MPI) numbers; this is particularly noticeable when assessing the fitness market potential tables. All activities from the fitness market potential table have MPI scores of 100+; all other activities have at least one activity that ranks below average MPI score. Looking at the other two categories (general sports and outdoor activity), even though they each have a few activities with MPI scores below the national averages, a majority of the activities' MPI scores fall above 100+. These overall high MPI scores show that Albemarle County has particularly strong participation rates when it comes to recreational activities. This becomes significant for when the County considers building new facilities or starting up new programs; giving them a strong tool to estimate resident attendance.

High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents of the service area will actively participate in offerings provided by the County.

1.8.1 GENERAL SPORTS MPI



1.8.2 GENERAL FITNESS MPI



1.8.3 OUTDOOR ACTIVITY