COMMUNITY PROFILE

1.1 OVERVIEW

A key component of the Parks and Recreation Master Plan ("Plan") is a Community Profile. The purpose of this analysis is to provide the Parks and Recreation Department ("Department") with insight into the community they serve. It also helps quantify the market in and around the City of San Bernardino ("City") and assists in providing a better understanding of the types of parks, facilities, programs, and services that are most appropriate to equitably address the residents' needs.

1.1.1 LAND ACKNOWLEDGMENT

We respectfully acknowledge that we reside on the traditional territory of the San Manuel Band of Mission Indians. We honor the Indigenous communities' stewardship of this land through generations, despite enduring historical injustices with unyielding resilience. We strive for reconciliation and commit to uplift the voices and sovereignty of Indigenous peoples in our quest for equitable and inclusive communities.

1.2 KEY FINDINGS

Population growth and age: The city's population is projected to experience moderate growth over the next 15 years, increasing from 220,812 to approximately 230,870 by 2037. With an average age of 30.3, the city's population is notably younger than the national average of 38.9, a difference of almost nine years.

Racial and Ethnic Diversity: Over the next 15 years, the city is expected to continue having a majority-minority population, with the dominant segments being 'Some other race' and 'Two or more races.' Furthermore, by 2037, it is projected that approximately 76% of the city's population will identify as Hispanic/Latino.

Income: On average, San Bernardino residents have lower per capita income ($20,646) and median household income ($52,416) compared to both California and national averages. This is despite facing an above-average cost of living and having a significantly larger household size. To ensure equitable access and inclusion in recreational programs and open spaces, it is essential for the city to offer a variety of high-quality options, allowing residents to participate at low or no cost.

Access to Parks & Tree Equity: Less than half of the City's population (46%) lives within a 10-minute walk of a park. This is slightly below the national average of 55%. Additionally, the City has a Tree Equity rating of 65 indicating the need for more tree canopy coverage throughout the City.

At-risk populations: The city has a higher-than-average proportion of non-English speakers, individuals with disabilities, and people living in poverty. To accommodate these at-risk populations, parks and recreation facilities must be inclusive and accessible. This involves providing bilingual signage and staff, implementing adaptive and inclusive programs, and ensuring that offerings cater to the needs of low-income families and individuals with disabilities.

1.3 DEMOGRAPHICS

The Demographic Analysis is a report that examines the characteristics of the population in the City, including age segments, race, ethnicity, and income levels. It covers the entire population of the City and uses historical patterns to make future projections. However, unforeseen circumstances during or after the time of the analysis could impact the validity of these projections. The infographic below summarizes the City's population based on current estimates for 2023.

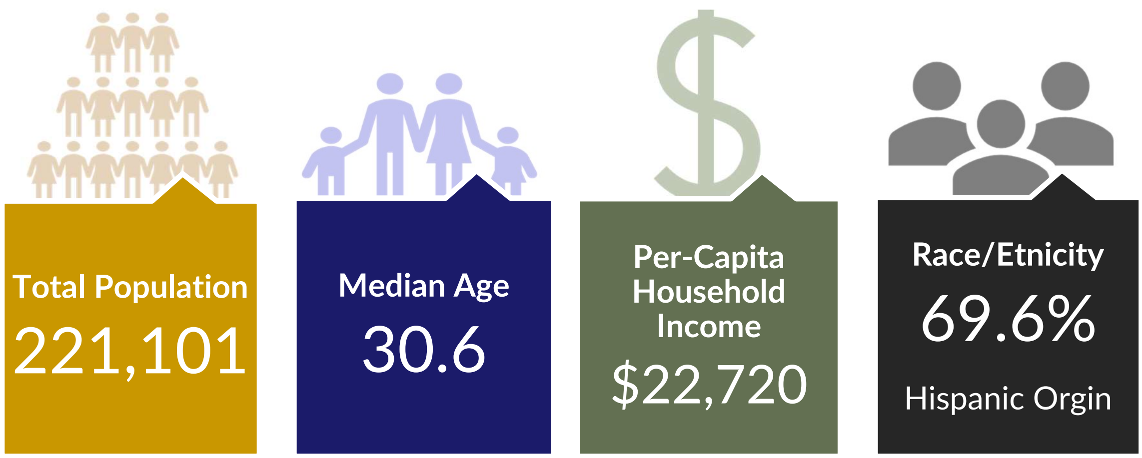

Figure 1: Demographic Summary

1.3.1 METHODOLOGY

The analysis used demographic data from two sources: the U.S. Census Bureau and Environmental Systems Research Institute, Inc. (ESRI), a research and development organization specializing in Geographical Information Systems and population projections. The data was obtained in July 2022 and reflects the actual numbers reported in the 2020 Census. ESRI used this data to estimate the current population in 2023, as well as a 5-year projection for 2028. The consulting team used straight-line linear regression to forecast demographic characteristics for 10 and 15-year projections in 2033 and 2038.

DEMOGRAPHIC ANALYSIS BOUNDARY

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

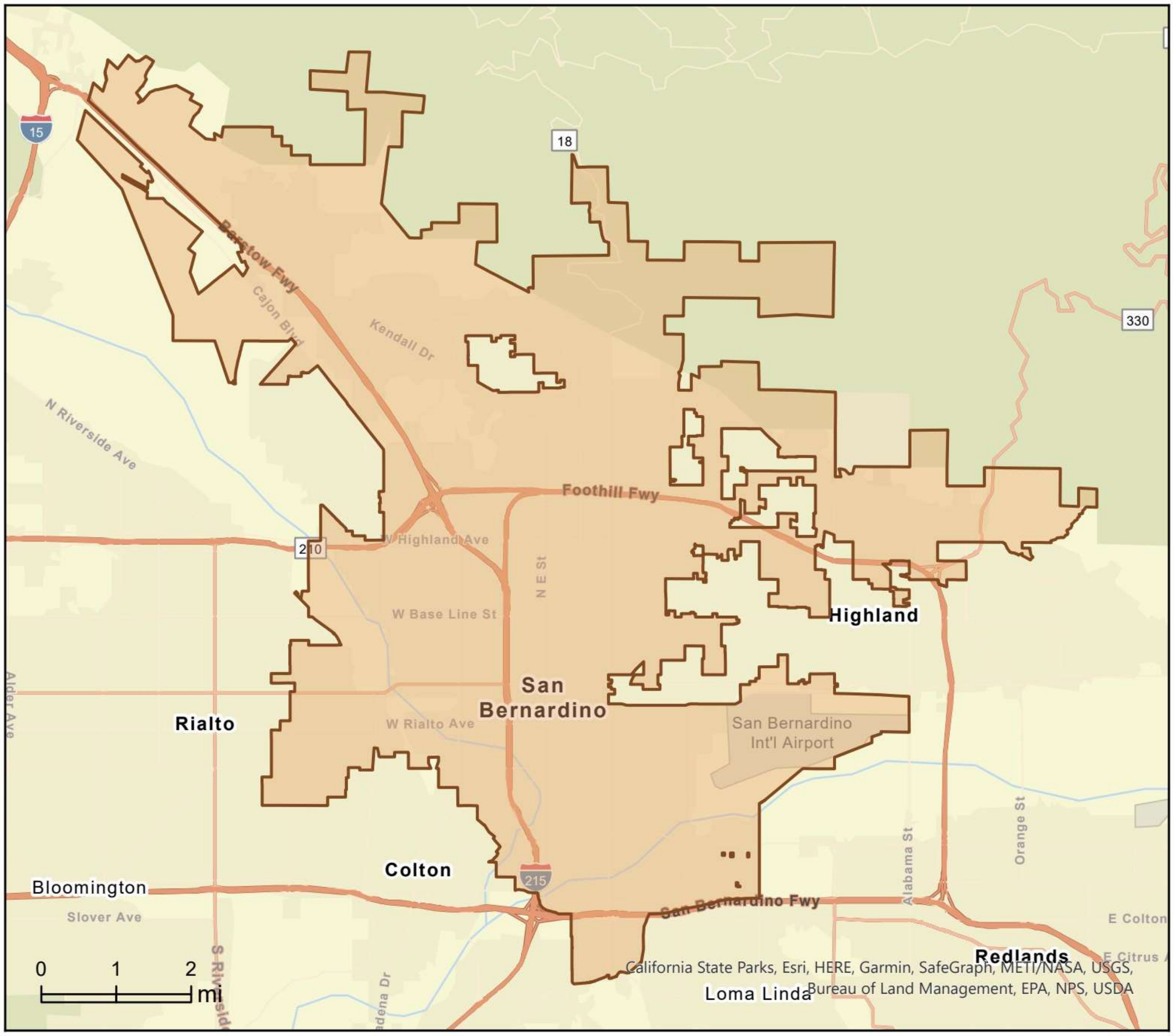

Figure 2: San Bernardino Boundary Map

1.3.2 CITY POPULACE

POPULATION

Between the 2010 and 2020 Census periods, the population of San Bernardino increased from 210,227 to 222,101, reflecting an annual growth rate of 0.57%. Despite a slight drop to 221,917 in 2023, it's projected that the city's population will resume its growth, reaching an estimated total of 232,675 inhabitants by 2038. This anticipated growth corresponds to a yearly rate of 0.32%.

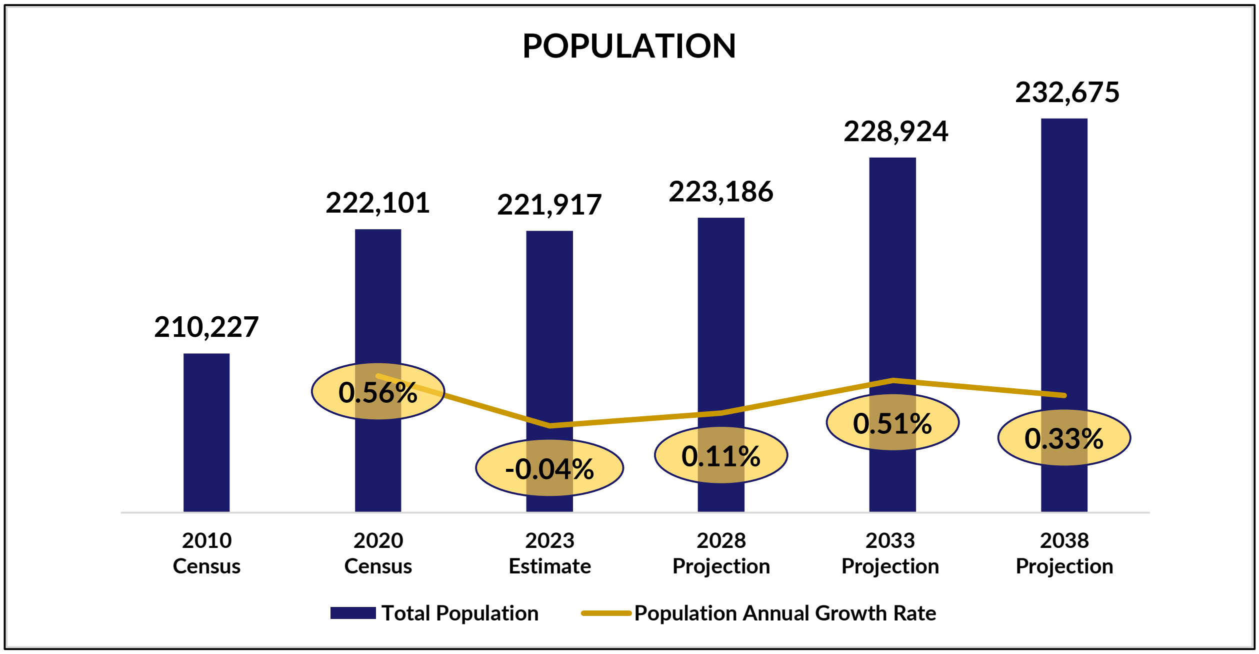

Figure 3: San Bernardino Population Trends

AGE SEGMENT

The City has a very young population with a median age of 30.6, which is almost nine years younger than the national median age of 39.1. Projections show that the population will age slightly, with a median age of 31.8 years old by 2028. Despite this increase, the median age will still be considerably below the state and national average.

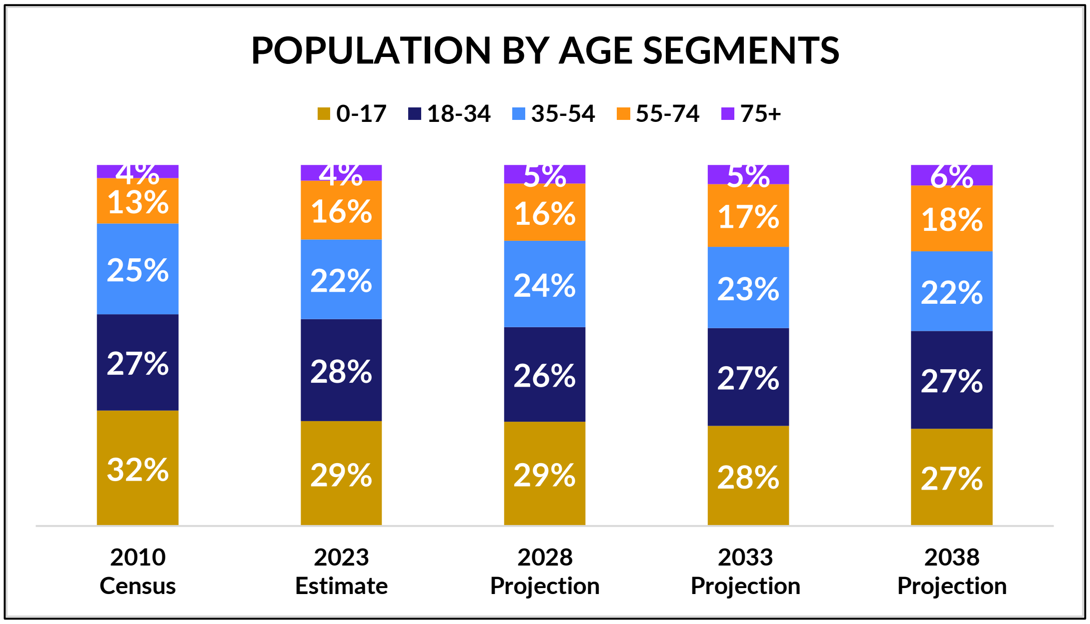

Figure 4: San Bernardino Age Segment Projections

RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined below. The Census 2020 data on race are not directly comparable with data from the 2010 Census and earlier censuses; therefore, caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2020) definitions and nomenclature are used within this analysis.

- **American Indian –** This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- **Asian** – This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- **Black or African American –** This includes a person having origins in any of the black racial groups of Africa
- **Native Hawaiian or Other Pacific Islander** – This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- **White –** This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- **Hispanic or Latino –** This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

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

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

RACE

At present, the City's population is majority-minority, indicating that the combined percentage of all non-White racial categories exceeds that of 'White Alone'. The largest minority group in the City's population is 'Some Other Race', making up 41% of the total population. Over the next 15 years, the percentage of 'White Alone' and 'Black Alone' is expected to decrease, projecting to only comprise a combined 15% of the population by 2038. It is anticipated that 'Some Other Race' and 'Two or More Races' will account for over three-quarters of the City's residents by that time.

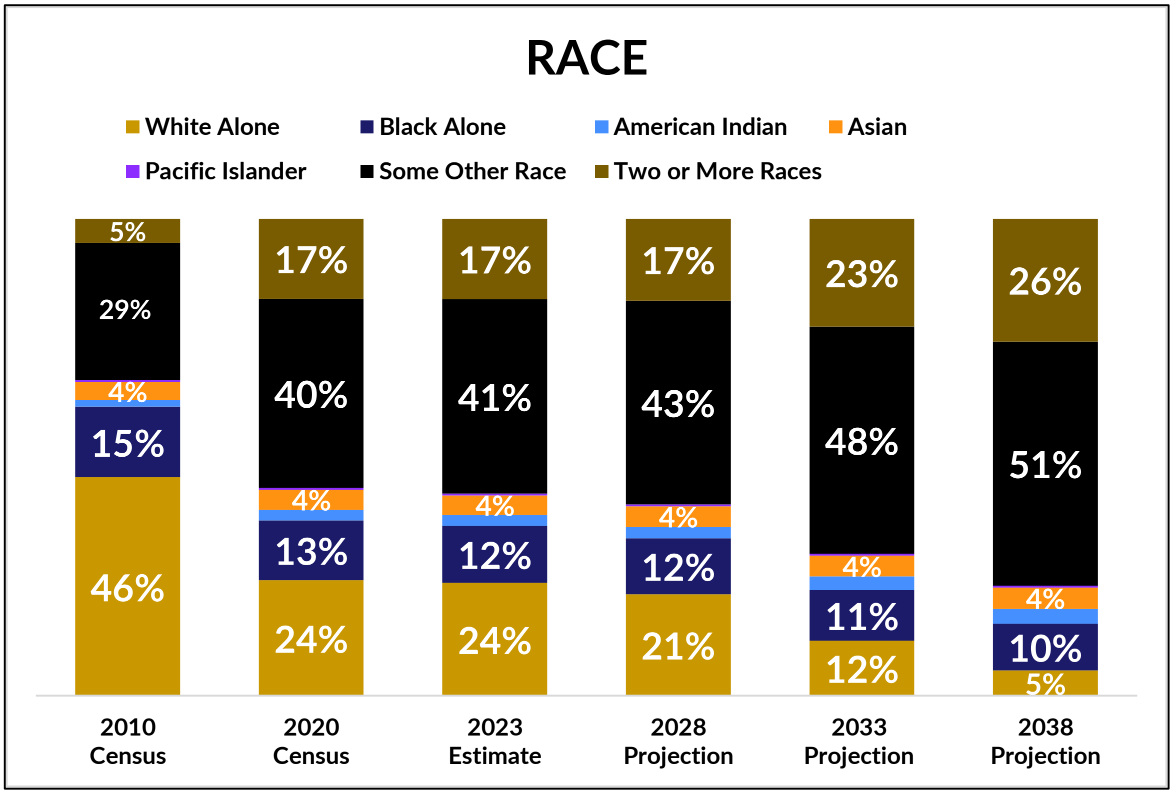

Figure 5: San Bernardino Population by Race Projections

ETHNICITY

The City's population was evaluated based on Hispanic/Latino ethnicity, which the Census Bureau views as separate from race. It is worth noting that individuals who identify as Hispanic/Latino may also belong to any of the racial categories mentioned earlier.

As per the current 2022 estimate, approximately 70% of the City's population consists of people of Hispanic/Latino origin, which is significantly higher than the national average of 19%. The Hispanic/Latino population has increased since the 2010 census and is projected to continue an upward trend through 2038, making up 78% of the City's total population.

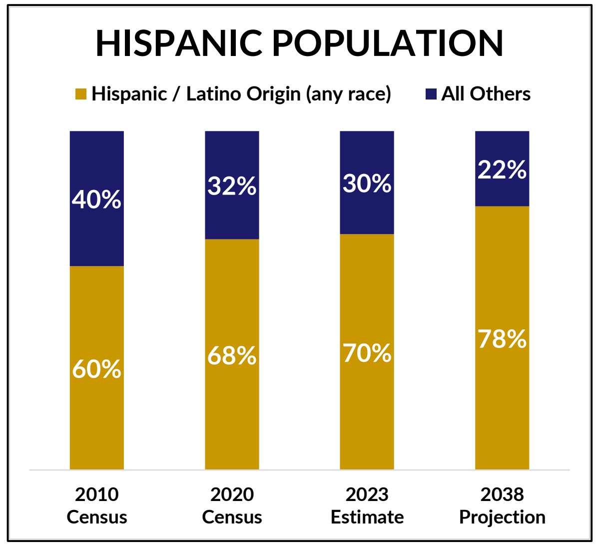

Figure 6: San Bernardino Hispanic Population Projections

INCOME

The average individual income, or per capita income, in the City is $22,720, which falls notably below the state average of $45,201 and the national average of $40,310. Similarly, the City's median household income — the total income of all individuals over the age of sixteen living in a single household — is $58,449. This amount is also significantly less than the state and national averages, which are $89,455 and $72,603, respectively.

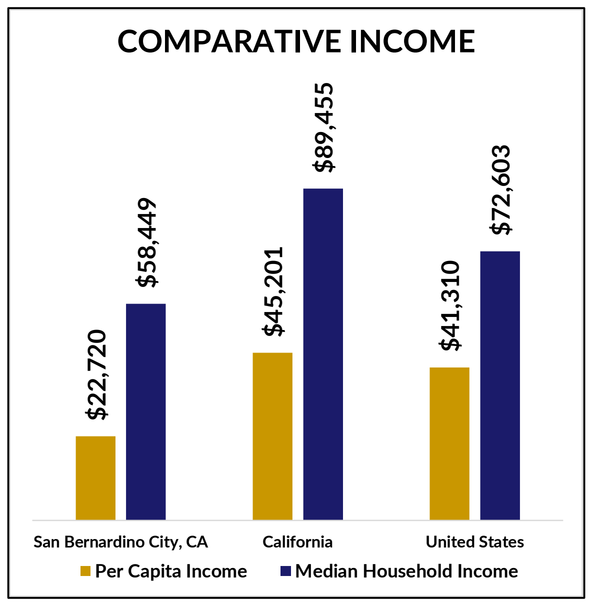

Figure 7: San Bernardino Comparative Income

AT-RISK POPULATION CHARACTERISTICS

The Census Bureau has identified five "at-risk" factors, and the following statistics compare how San Bernardino compares to state and national averages in these categories. The foreign-born population in San Bernardino is at 22%, which is slightly lower than the state average of 26.5% but significantly higher than the national average of 13.6%. Regarding languages spoken at home, 52.2% of San Bernardino residents speak a non-English language at home, which is higher than the state average of 43.9% and more than double the national average of 21.7%.

Concerning disability, 9.1% of San Bernardino's population lives with a disability, which is higher than both the state average of 6.8% and the national average of 8.7%. Furthermore, the rate of uninsured individuals in San Bernardino is 11.2%, which exceeds both the state average of 8.9% and the national average of 9.8%. Lastly, the poverty rate in San Bernardino is 20.9%, significantly higher than both the state average of 12.3% and the national average of 11.6%.

2022 Demographic Comparison		San Bernardino City, CA	California	United States
At Risk Population Characteristics	Foreign Born	**22.0%**	26.5%	13.6%
	Language other Than English Spoken at Home	**52.2%**	43.9%	21.7%
	With a Disability	**9.1%**	6.8%	8.7%
	No Health Insurance	**11.2%**	8.9%	9.8%
	Persons in Poverty	**20.9%**	12.3%	11.6%

Figure 8: At-Risk Population Characteristics

HOMELESS POPULATION

San Bernardino is currently facing a growing homelessness crisis due to a combination of factors such as rising housing costs, low-income levels, unemployment, mental health issues, and substance abuse. The increasing number of homeless individuals has prompted city officials to implement various programs and initiatives to tackle the problem.

In response to the crisis, San Bernardino has introduced housing programs aimed at providing affordable housing options, supportive services tailored to the needs of homeless individuals, and emergency shelters to offer temporary accommodation. To better coordinate these efforts and develop comprehensive strategies for combating homelessness, a Homelessness Task Force has been created.

Recognizing the urgent need for resources, the city council approved $20 million in American Rescue Plan Act funds to execute a Homelessness Action Plan. This plan includes the construction of a navigation center, which will offer essential support services to homeless individuals, such as case management, healthcare access, job training, and assistance in finding permanent housing.

Despite these efforts, the 2022 Point-In-Time Homeless Count reveals a concerning reality: with 992 unsheltered individuals and 358 others in sheltered or transitional housing, San Bernardino's resources are currently insufficient to meet the needs of its homeless population. The city has only 253 shelter beds available within its limits, highlighting the pressing need for additional support.

To address this issue, city officials declared homelessness a local emergency, which allows San Bernardino to take immediate and decisive action. This declaration enables the city to accelerate zoning regulation changes, expand housing options by converting existing buildings or constructing new ones, and authorize the use of structures for emergency housing purposes.

In addition to these measures, San Bernardino is working to strengthen partnerships with local non-profit organizations, faith-based groups, and businesses to pool resources and develop collaborative approaches to addressing homelessness. This collaboration aims to provide a more comprehensive support network for homeless individuals and help them transition into stable housing.

Through these concerted efforts, San Bernardino hopes to make significant progress in addressing its homelessness crisis and ensuring that all residents have access to safe, stable housing. The city's approach demonstrates a commitment to tackling this complex issue by investing in essential resources, developing innovative strategies, and fostering community-wide collaboration.

UNDOCUMENTED POPULATION

The undocumented population in San Bernardino, California, represents a diverse and vital part of the community. Although the precise number of undocumented residents remains unknown, they are believed to constitute a significant percentage of the city's population, with some estimates ranging from tens of thousands to even higher.

The majority of the undocumented individuals living in San Bernardino hail from Latin American countries, most notably Mexico, but also from countries like El Salvador, Guatemala, and

Honduras. They come to the United States seeking better economic opportunities, fleeing violence, or reuniting with family members.

Undocumented residents contribute to San Bernardino's economy through various industries, such as agriculture, construction, hospitality, and domestic work. They provide essential labor and skills, often working in low-wage jobs and under difficult conditions that many US citizens are unwilling to accept. Their contributions to the local economy are significant, as they pay taxes, rent, and contribute to the consumer market.

However, the undocumented population faces numerous challenges in San Bernardino. They often have limited access to public services like healthcare, education, and social welfare programs due to their immigration status. This lack of access can lead to disparities in health outcomes and educational attainment among the undocumented community. Additionally, undocumented residents are at a higher risk of exploitation by employers, as they may be hesitant to report workplace violations for fear of revealing their immigration status.

The constant threat of deportation looms large over the undocumented community in San Bernardino, as they remain vulnerable to immigration raids and detention. This fear can lead to social isolation, as individuals may avoid engaging with public institutions or participating in community events to minimize the risk of being discovered.

To address the challenges faced by the undocumented population in San Bernardino, various local organizations and advocacy groups work to provide support and resources. These groups offer services such as legal aid, healthcare access, educational programs, and assistance in navigating the immigration system. They also work to raise awareness of the plight of undocumented individuals and advocate for more inclusive immigration policies at the local, state, and federal levels.

The undocumented population in San Bernardino is a diverse and vital part of the community, contributing significantly to the local economy. However, they face numerous challenges due to their immigration status, including limited access to public services and the constant threat of deportation. Local organizations and advocacy groups are working tirelessly to support the undocumented community and address the obstacles they face.

COST OF LIVING

The cost-of-living index is a measure of how expensive it is to live in a particular area or city compared to another area or city. The index is typically calculated by comparing the prices of a basket of goods and services, such as housing, transportation, food, healthcare, and utilities, in different locations.

The national average cost-of-living index in the United States is set at 100, and the cost-of-living index for a specific city or region is typically reported as a percentage of the national average.

Cost of Living	San Bernardino
Overall	109.5
Grocery	98.3
Health	86.7
Housing	124.4
Utilities	109.1
Transportation	111.3
Miscellaneous	110.7

Figure 9: Cost of Living Index

For example, if the cost-of-living index for a city is 110, it means that it is 10% more expensive to live in that city than the national average.

With an overall cost of living index at 109.5, City residents encounter costs that are slightly above the national average. Examining the various aspects of living costs uncovers a diverse picture across different sectors.

San Bernardino's grocery index of 98.3 indicates grocery costs are slightly below the national average, allowing residents to purchase a broad range of fresh produce and household essentials without significant financial burden. The city also has a low health index of 86.7, making healthcare more affordable compared to many other regions. This is especially beneficial for families and individuals with ongoing medical needs or chronic conditions.

On the other hand, the housing market in San Bernardino poses a challenge, with a housing index of 124.4. Residents face higher costs for renting and buying properties due to the city's close proximity to Los Angeles and the ever-increasing demand for housing in the region. Despite high housing costs, many residents choose to live in San Bernardino for its thriving job market, diverse communities, and cultural attractions.

Utilities in San Bernardino are more expensive than the national average, with an index of 109.1. Higher expenses for electricity, natural gas, and water services stem from the rising energy demands and limited resources in California. Furthermore, the cost of living in San Bernardino surpasses the national average in transportation, with an index of 111.3. Residents face higher costs for gasoline, public transportation, and vehicle maintenance, partly due to extensive commuting to Los Angeles and neighboring cities for work.

Lastly, San Bernardino's miscellaneous index, encompassing expenses such as clothing, dining out, and entertainment, stands at 110.7. This suggests that residents need to allocate a slightly larger portion of their income to indulge in life's luxuries and maintain their social lives.

The challenge of the above-average cost of living in San Bernardino is further intensified by the residents' substantially below-average income levels. Although healthcare and groceries are relatively affordable, residents must cope with higher costs for housing, utilities, transportation, and miscellaneous expenses. Despite these challenges, many people continue to call San Bernardino home, drawn to its vibrant communities, rich cultural scene, and promising job market.

1.3.3 10-MINUTE WALK

The Trust for Public Land firmly believes that every person residing in U.S. cities should have access to a high-quality park that is located within a 10-minute walking distance from their home. To make this vision a reality, they launched the "10-Minute Walk Program" aimed at helping cities expand access to green spaces for all. The Trust for Public Land has conducted research, which has revealed that parks that cater to a predominantly people of color demographic are, on average, only half the size of parks that primarily serve white populations. Despite their smaller size, these parks serve nearly five times as many people. Additionally, parks that primarily serve low-income households are, on average, four times smaller than parks that serve high-income households.

Figure 10: Percentage of Residents Living Within a 10-Minute Walk of a Park

The current statistics indicate that only 46% of the residents of San Bernardino have a park located within a 10-minute walking distance from their homes, which is lower than the national average of 55%. Additional information regarding the “10-Minute Walk Program” can be found at https://www.tpl.org/.

1.3.4 TREE EQUITY

A Tree Equity Score is a method used by cities to evaluate how effectively they are providing fair access to tree canopy coverage for all residents. This score uses a combination of factors, such as the need for tree canopy coverage and the priority for planting trees in urban neighborhoods (which are defined by Census Block Groups). It is based on data related to tree canopy coverage, climate, demographics, and socioeconomics.

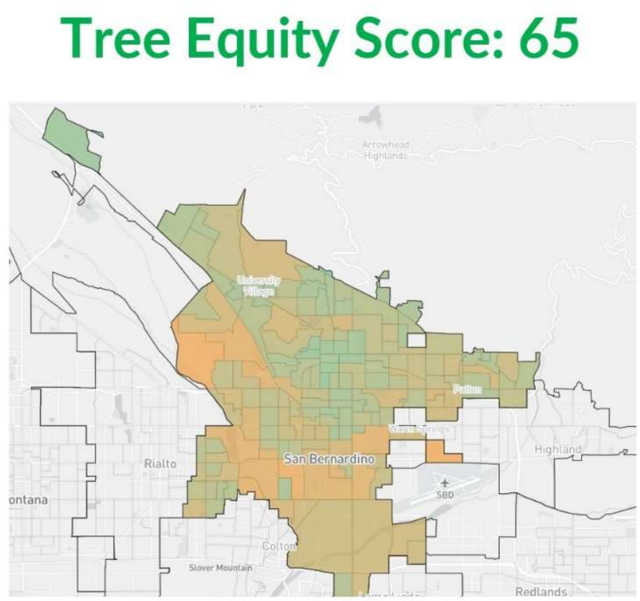

Figure 11: San Bernardino Tree Equity Map

The score is calculated at the neighborhood (block group) level and then aggregated to the municipal level to provide an overall assessment of the city's performance in delivering equitable tree canopy coverage.

San Bernardino currently has a tree equity score of 65. Of the 159 block groups in San Bernardino:

- 124 have a Tree Equity Score below 75
- 16 of the 159 have a score below 50.

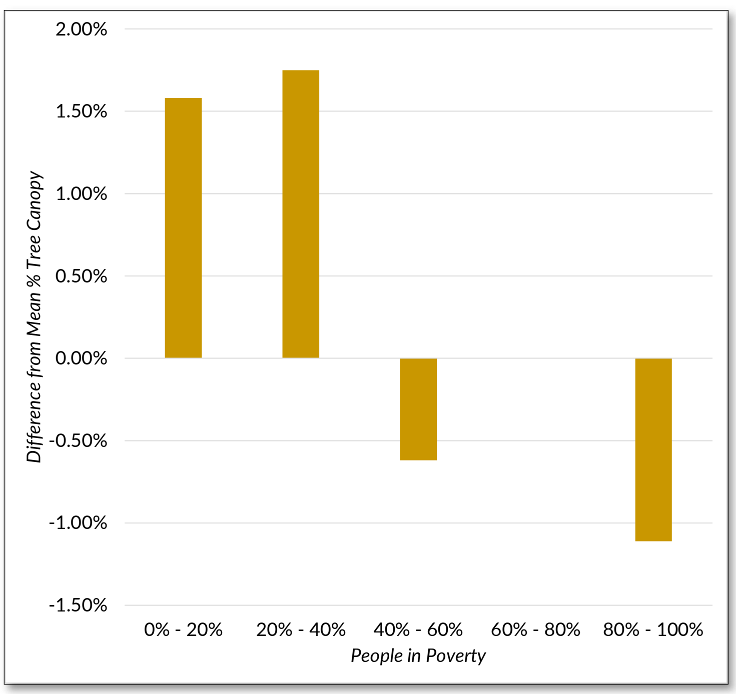

Figure 12: Difference in Tree Canopy by People in Poverty

Neighborhoods with larger percentages of people of color and/or lower income households living within them tend to have lower tree equity scores, meaning they have less tree canopy cover. ***Figure 14*** shows the percentage breakdown for neighborhoods in terms of tree canopy coverage in relation to the percentages of people in poverty living in San Bernardino.

Additional information regarding tree equity can be found at https://www.treeequityscore.org/.

1.4 LOCAL RECREATIONAL TRENDS

The Trends Analysis offers insights into recreational trends at the national, regional, and local levels, as well as recreational interests segmented by age. This analysis utilizes data on trends sourced from the Sports & Fitness Industry Association (SFIA), the National Recreation and Park Association (NRPA), and Environmental Systems Research Institute, Inc. (ESRI). The trends data used in this analysis is based on participation rates that are current or historical, statistically valid survey results, or NRPA Park Metrics.

1.4.1 LOCAL SPORT AND LEISURE MARKET POTENTIAL

ESRI provided the following charts depicting sports and leisure market potential data for San Bernardino residents. The Market Potential Index (MPI) is utilized to measure probable demand for a product or service within defined service areas. MPI scores display the likelihood that an adult resident will partake in certain activities when compared to the national U.S. average. The national average is set at 100, so scores below 100 indicate lower-than-average participation rates, while scores above 100 indicate higher-than-average participation rates. The service area is evaluated against the national average across four categories: general sports, fitness, outdoor activity, and commercial recreation.

It is important to note that MPI metrics represent only one data point used to help determine community trends. Programmatic decisions should not be solely based on MPI metrics. The following charts compare MPI scores for 46 sport and leisure activities prevalent for residents in the City. The activities are grouped by type and listed in descending order, from highest to lowest MPI score. Index numbers of 100 or higher hold significance as they indicate a greater likelihood that residents within service areas will actively participate in those Department offerings. Conversely, below-average MPI scores suggest lower levels of participation in specific activities and may indicate a need for certain recreational spaces, amenities, and/or programs.

GENERAL SPORTS MARKET POTENTIAL

Out of the eight activities mentioned, six scored at or above the national average. Soccer stood out with the highest MPI of 141. On the other hand, Golf, with an MPI of 67, was the only sport that significantly fell below the national average, marking it as the lowest.

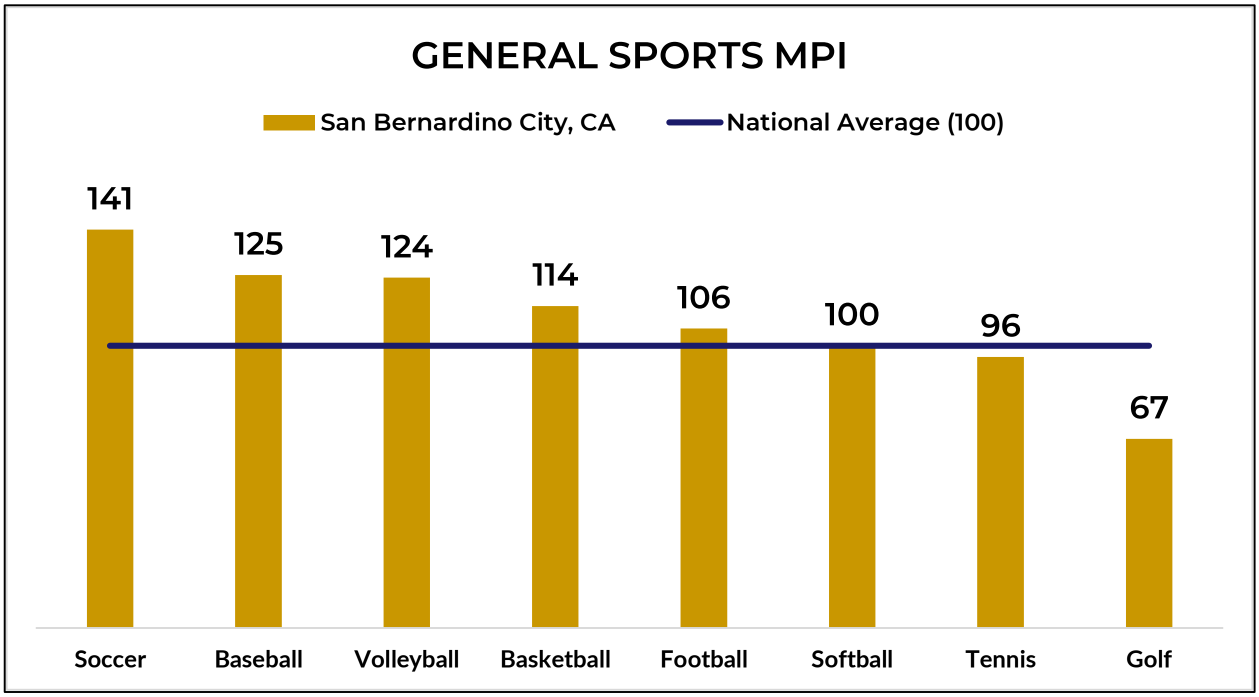

Figure 13: General Sports MPI

FITNESS

Among the listed fitness activities, only Zumba exceeded the national average, with an impressive MPI of 140.

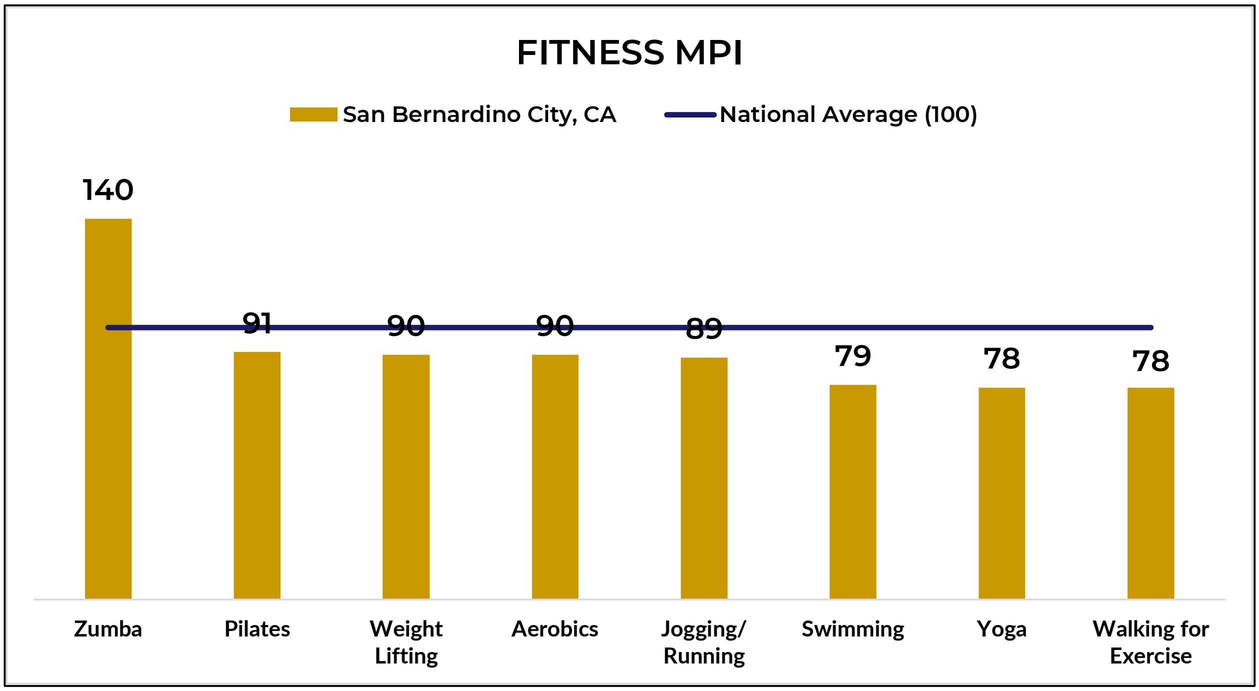

Figure 14: Fitness MPI

OUTDOOR ACTIVITY

Only two of the outdoor activities listed were above the national average MPI, Rock Climbing (113) and Mountain Bicycling (105). Canoeing/Kayaking (66) and Fresh Water Fishing (62) had the lowest MPI scores and fell significantly below the national average.

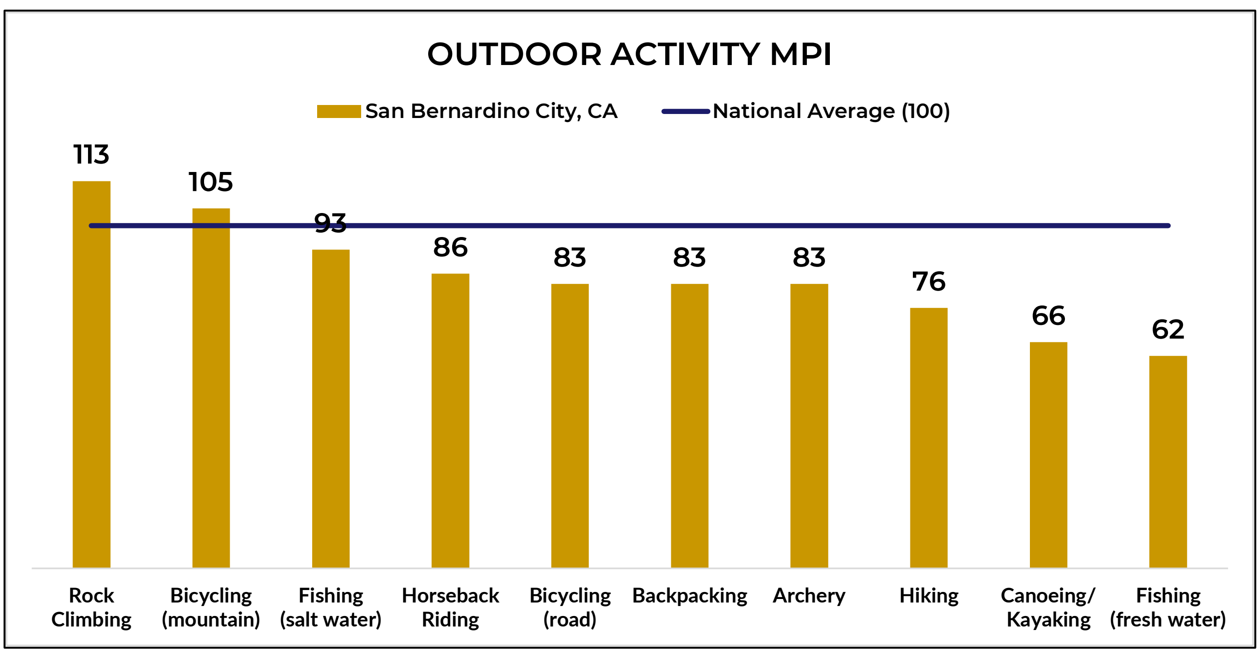

Figure 15: Outdoor Activity MPI

COMMERCIAL RECREATION

Of the categories listed in Commercial Recreation, five of them have MPIs at or above the national average, Playe chess (113), Played portable video/electronic game (106), Attended adult education course (103), Played video console video/electronic game (103) and Participated in Painting, Drawing, or sculpting (100).

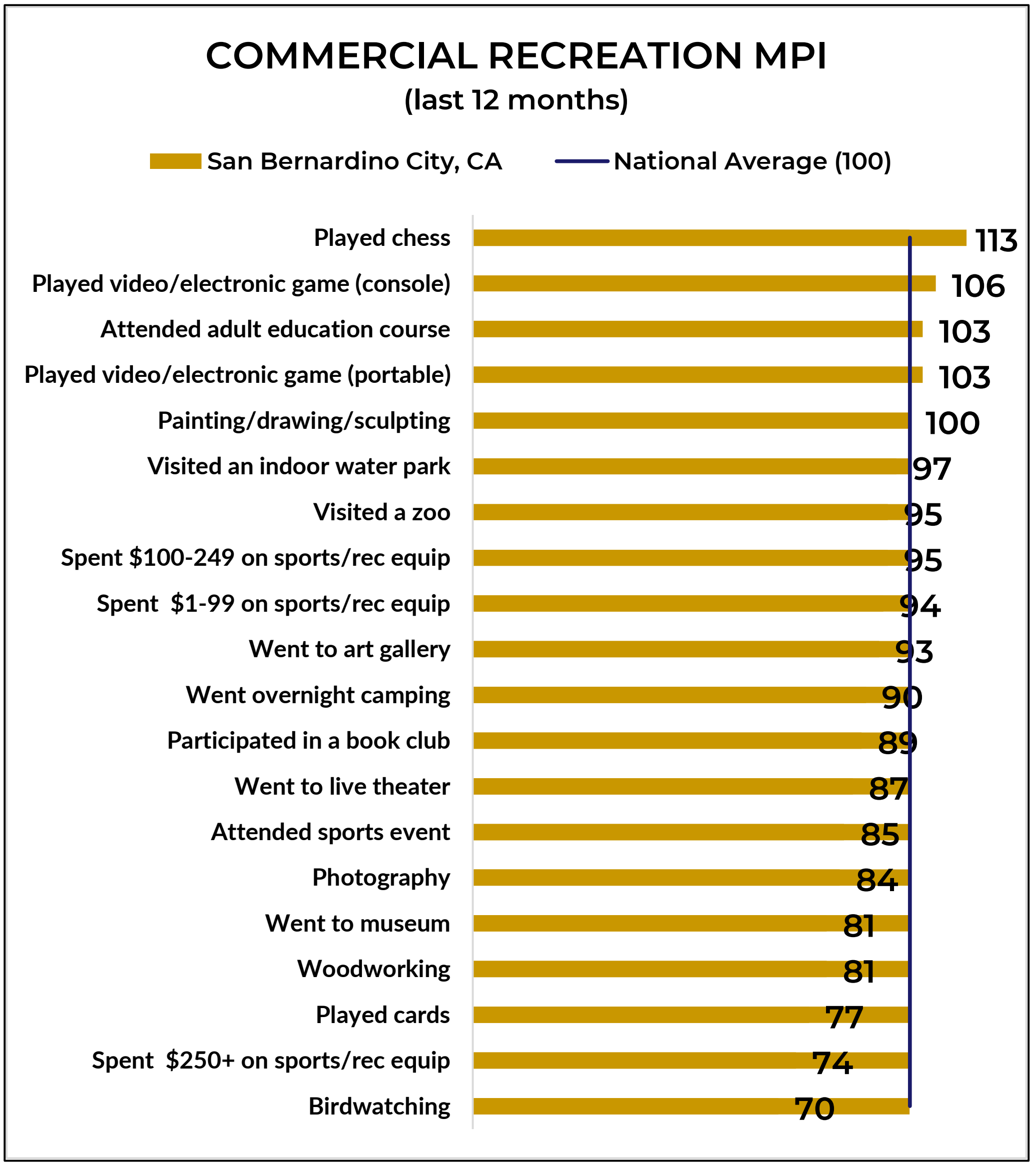

Figure 16: Commercial Recreation MPI

1.5 NATIONAL TRENDS IN RECREATION

1.5.1 METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Leisure Activities Topline Participation Report 2023* was utilized to evaluate National Recreation Participatory Trends.

The methodology of this study is rooted in a nationwide survey conducted in the 2022 calendar year by Sports Marketing Surveys USA (SMS), under the supervision of the Sports & Fitness Industry Association (SFIA) and in collaboration with seven other sports industry associations comprising the Physical Activity Council (PAC). The study was conceptualized and deployed by Digital Research Inc. (DRI), with all supplementary data being credited to the joint research efforts of SFIA and SMS.

Throughout 2022, the study completed 18,000 online interviews involving a nationwide sample of individuals aged six and older. These participants were selected from proprietary online panels designed to be representative of the broader U.S. population. Strict quotas related to gender, age, income, region, and ethnicity were implemented to assure a balanced and representative sample.

The survey's robust sample size of 18,000 completed interviews facilitates a high degree of statistical accuracy. However, it's acknowledged that all surveys are subject to a standard error, which indicates the extent to which the results may differ from those acquired through a comprehensive census of the entire U.S. population. For instance, a sport with a participation rate of five percent exhibits a confidence interval of plus or minus 0.32 percentage points at the 95 percent confidence level.

To further ensure the representation of the data, a weighting technique was employed. This adjusted the data to mirror the entire U.S. population aged six and above, utilizing variables such as gender, age, income, ethnicity, household size, region, and population density. The total population figure applied was 305,439,858 individuals aged six and older.

The study reports activity based on a rolling 12-month participation rate. Unless explicitly specified, all charts present data corresponding to U.S. populations aged six and over.

All category and activity names are those used by SFIA.

1.5.2 OVERALL PARTICIPATION IN THE U.S.

For the fifth year running, physical activity rates among Americans continued to rise. Specifically, 77.6% of all Americans, representing approximately 236.9 million individuals, took part in at least one activity during the year. This figure denotes a 9.2% increase compared to 2017, and a 1.9% rise compared to 2021. In essence, this means that 20 million more individuals participated in at least one physical activity annually compared to 2017, suggesting a growing prioritization of physical activity in American lifestyles.

Racquet sports experienced the most significant rise in participation in 2022, with a surge of 17.6% or about 8 million participants from the previous year. All racquet sports monitored by SFIA saw increased participation in 2022, with pickleball outpacing others with an 85.7% annual growth rate. Conversely, individual and winter sports were the only categories that didn't register increased participation in 2022.

Team sports rebounded from the sharp downturn they faced in 2020 due to the pandemic, with their participation rate climbing to 23.2% in 2022, almost reaching the 2019 level of 23.4%. In 2022, participation rates in water sports and outdoor sports similarly rose, comparable to the increases seen in team sports, while the fitness participation rate remained steady.

When comparing participation rates from 2013 to 2022, it's evident that physical activity has become a higher priority for Americans over the past decade. Every sports category saw an increase in participation rates, except for individual sports, which experienced a slight decrease from 43.3% to 41.3%. Fitness sports reported the largest growth in participation rate, rising from 60.1% in 2013 to 67.4% in 2022.

1.5.3 INACTIVITY IN THE U.S.

In a first since 2010, the number of totally inactive individuals in the U.S.—those not participating in any of the sports or activities monitored by SFIA—fell below 70 million. In 2022, the count of inactive individuals stood at 68.6 million or 22.4% of Americans, marking the fourth consecutive annual decrease.

A decline in inactivity was observed across all age groups, except for those aged 18-24 and 25-34. SFIA posits that the increase in inactivity within these groups might be due to significant life transitions such as attending college or starting a family, which were temporarily paused during the onset of the pandemic. Even though inactivity rates for these age groups have risen in 2022, they remain lower than their 2017 rates. Thus, every age group reported lower inactivity rates in 2022 compared to 2017.

Further positive news emerged when examining inactivity rates across income levels. Every income level saw a reduction in inactivity rates of more than 3% in 2022, with the most substantial decrease of 5.2% occurring within the $25k-$49,999 income bracket. Similar to the age group analysis, every income category in 2022 registered lower inactivity rates than in 2017. This trend indicates a growing number of Americans are prioritizing and investing in physical activity (and have better access to opportunities for participation) compared to previous years.

1.5.4 NATIONAL PARTICIPITATION

FITNESS TRENDS

Figure 17: Most Participated in Fitness Activities Nationally

The most popular fitness activity was Walking for Fitness, with 114.8 million participants, though it experienced a small decrease of 0.9% from the previous year. Despite this, it showed a 3% increase in participation over the last three years. The second most popular activity, Treadmill exercising, had around 53.6 million participants, which was largely stable from 2021, but showed a decrease of 5.7% since 2019.

Free Weights (Dumbbells/Hand Weights) also experienced growth in 2022, with approximately 53.1 million participants. This represents a 1% increase from 2021 and a 3.3% increase over three years. Meanwhile, Yoga and Pilates Training showed significant growth over the three years with an increase of 10.4% and 11.6% respectively.

The most significant three-year decreases were observed in Cross-Training Style Workouts and Group Stationary Cycling, with a decrease of 31.7% and 36.9% respectively. Despite some decreases, many fitness activities maintained or increased their number of participants, indicating an ongoing interest in physical fitness among Americans.

FITNESS PARTICIPANTS						
	2019	2020	2021	2022	1-year change	3-year change
Walking for Fitness	111,439	114,044	115,814	114,759	-0.9%	3.0%
Treadmill	56,823	49,832	53,627	53,589	-0.1%	-5.7%
Free Weights (Dumbbells/Hand Weights)	51,450	53,256	52,636	53,140	1.0%	3.3%
Running/Jogging	50,052	50,652	48,977	47,816	-2.4%	-4.5%
Yoga	30,456	32,808	34,347	33,636	-2.1%	10.4%
Stationary Cycling (Recumbent/Upright)	37,085	31,287	32,453	32,102	-1.1%	-13.4%
Weight/Resistance Machines	36,181	30,651	30,577	30,010	-1.9%	-17.1%
Free Weights (Barbell)	28,379	28,790	28,243	28,678	1.5%	1.1%
Elliptical Motion/Cross-Trainer	33,056	27,920	27,618	27,051	-2.1%	-18.2%
Swimming for Fitness	28,219	25,666	25,620	26,272	2.5%	-6.9%
Dance, Step, and Other Choreographed Exercise to Music	23,957	25,160	24,752	25,163	1.7%	5.0%
Bodyweight Exercise & Bodyweight Accessory-Assisted Training	23,504	22,845	22,629	22,034	-2.6%	-6.3%
High Impact/Intensity Training	22,044	22,487	21,973	21,821	-0.7%	-1.0%
Kettlebells	12,857	13,576	13,557	13,694	1.0%	6.5%
Rowing Machine	12,809	11,694	11,586	11,893	2.6%	-7.2%
Stair-Climbing Machine	15,359	11,261	11,786	11,677	-0.9%	-24.0%
Aquatic Exercise	11,189	10,954	10,400	10,676	2.6%	-4.6%
Pilates Training	9,243	9,905	9,745	10,311	5.8%	11.6%
Cross-Training Style Workouts	13,542	9,179	9,764	9,248	-5.3%	-31.7%
Stationary Cycling (Group)	9,930	6,054	5,939	6,268	5.5%	-36.9%
Cardio Kickboxing	7,026	5,295	5,099	5,531	8.5%	-21.3%
Boot Camp Style Training	6,830	4,969	5,169	5,192	0.4%	-24.0%
Barre	3,665	3,579	3,659	3,803	3.9%	3.8%
Tai Chi	3,793	3,300	3,393	3,394	0.0%	-10.5%
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 18: National Fitness Participation

NEXT PRACTICE PARTNERS

TEAM SPORTS TRENDS

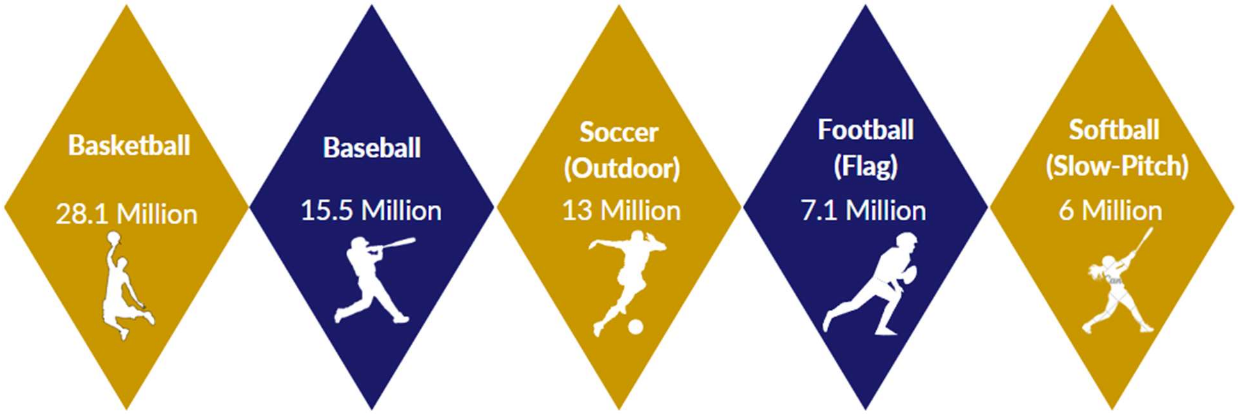

Figure 19: Most Participated in Team Sports Activities Nationally

Basketball continued to lead in team sports participation with over 28.1 million participants, marking a 3.7% increase from 2021 and an impressive 13% increase over the past three years. Baseball and outdoor soccer followed, with approximately 15.5 million and 13 million participants respectively. While baseball saw a slight decrease of 0.7% in the past year, and a 2.1% decrease over the past three years, outdoor soccer saw a healthy 3.7% increase from the previous year and 9.3% over three years.

Among other notable sports, gymnastics exhibited the most substantial growth from 2021 to 2022, with a 7% increase in participants, bringing the total to approximately 4.6 million. Conversely, rugby had the most significant drop with a 5.8% decrease from the previous year and a steep 16.2% decrease over the last three years.

Overall, despite some declines, many team sports either sustained or increased their participation numbers in 2022, underlining the continued popularity of these activities.

TEAM SPORTS PARTICIPANTS						
	2019	2020	2021	2022	1-year change	3-year change
Basketball	24,917	27,753	27,135	28,149	3.7%	13.0%
Baseball	15,804	15,731	15,587	15,478	-0.7%	-2.1%
Soccer (Outdoor)	11,913	12,444	12,556	13,018	3.7%	9.3%
Football (Flag)	6,783	7,001	6,889	7,104	3.1%	4.7%
Volleyball (Court)	6,487	5,410	5,849	6,092	4.2%	-6.1%
Softball (Slow-Pitch)	7,071	6,349	6,008	6,036	0.5%	-14.6%
Soccer (Indoor)	5,336	5,440	5,408	5,495	1.6%	3.0%
Football (Touch)	5,171	4,846	4,884	4,843	-0.8%	-6.3%
Gymnastics	4,699	3,848	4,268	4,569	7.0%	-2.8%
Volleyball (Beach/Sand)	4,400	4,320	4,184	4,128	-1.3%	-6.2%
Track and Field	4,139	3,636	3,587	3,690	2.9%	-10.8%
Cheerleading	3,752	3,308	3,465	3,507	1.2%	-6.5%
Swimming on a Team	2,822	2,615	2,824	2,904	2.9%	2.9%
Volleyball (Grass)	3,136	2,738	2,807	2,829	0.8%	-9.8%
Paintball	2,881	2,781	2,562	2,592	1.2%	-10.0%
Ice Hockey	2,357	2,270	2,306	2,278	-1.3%	-3.4%
Softball (Fast-Pitch)	2,242	1,811	2,088	2,146	2.8%	-4.3%
Ultimate Frisbee	2,290	2,325	2,190	2,142	-2.2%	-6.5%
Wrestling	1,944	1,931	1,937	2,036	5.1%	4.7%
Lacrosse	2,115	1,884	1,892	1,875	-0.9%	-11.4%
Roller Hockey	1,616	1,500	1,425	1,368	-4.0%	-15.3%
Rugby	1,392	1,242	1,238	1,166	-5.8%	-16.2%
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 20: National Team Sports Participation

INDIVIDUAL ACTIVITY TRENDS

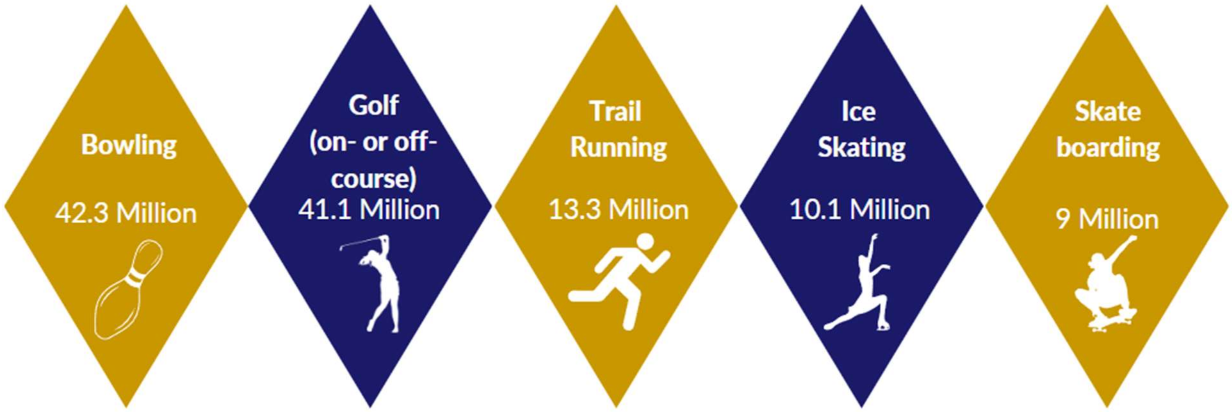

Figure 21: Most Participated in Individual Activities Nationally

Individual sports activities demonstrated diverse trends in participation rates. Bowling remained popular, with over 42.2 million participants, marking a 1.5% increase from the previous year. However, golf, both on and off-course, stole the limelight with significant growth rates. On or off-course golf combined experienced a substantial 9.7% increase from 2021, with over 41 million participants, underpinned by a massive 25.7% increase in off-course golf participation (driving range, golf entertainment venue, indoor simulator) that skyrocketed to about 15.5 million participants.

Skateboarding also showed strong growth, with a 3.1% increase from 2021 and a substantial 36.4% growth over three years, bringing its total to just over 9 million participants. Meanwhile, trail running and ice skating saw considerable growth of 5.9% and 6.4% from 2021, respectively.

On the contrary, adventure racing experienced a decrease in participation, dropping by 6.1% from 2021 and 20% over three years. Traditional road triathlons also suffered a decline, with an 11% decrease in participants over the past three years. Despite these drops, individual sports and activities generally saw an upward trend in participation in 2022.

INDIVIDUAL ACTIVITY PARTICIPANTS						
	2019	2020	2021	2022	1-year change	3-year change
Bowling	45,372	40,143	41,666	42,292	1.5%	-6.8%
Golf (on- or off-course)	34,176	36,861	37,473	41,096	9.7%	20.2%
Trail Running	10,997	11,854	12,520	13,253	5.9%	20.5%
Ice Skating	9,460	9,857	9,481	10,086	6.4%	6.6%
Skateboarding	6,610	8,872	8,747	9,019	3.1%	36.4%
Archery	7,449	7,249	7,342	7,428	1.2%	-0.3%
Horseback Riding	6,990	6,748	6,919	7,309	5.6%	4.6%
Roller Skating (2x2 Wheels)	6,612	6,160	6,373	6,810	6.9%	3.0%
Martial Arts	6,068	6,064	6,186	6,355	2.7%	4.7%
Boxing for Fitness	5,198	5,230	5,237	5,472	4.5%	5.3%
Roller Skating (Inline Wheels)	4,816	4,892	4,940	5,173	4.7%	7.4%
MMA for Fitness	2,405	2,445	2,339	2,524	7.9%	5.0%
Triathlon (Traditional/Road)	2,001	1,846	1,748	1,780	1.8%	-11.0%
Adventure Racing	2,143	1,966	1,826	1,714	-6.1%	-20.0%
Triathlon (Non-Traditional/Off Road)	1,472	1,363	1,304	1,350	3.5%	-8.2%
MMA for Competition	978	979	1,026	1,076	4.9%	10.1%
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 22: National Individual Activity Participation

OUTDOOR ACTIVITY TRENDS

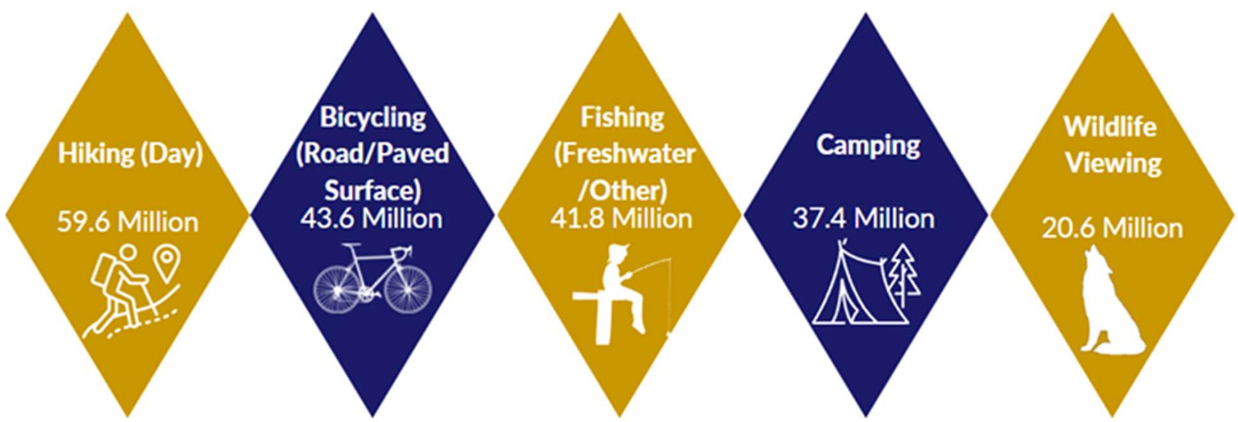

Figure 23: Most participated in Outdoor Activities Nationally

Outdoor activities experienced a surge in participation. Hiking continued to lead with a 1.5% yearly and a 19.9% three-year increase, with nearly 59.6 million participants. Bicycling on paved surfaces and freshwater fishing also grew by 1.8% and 2.4% respectively. Camping saw a considerable 4.0% annual growth, and birdwatching and saltwater fishing increased by 6.8% and 4.0% respectively.

However, target shooting with handguns and rifles experienced a decrease, as did overnight backpacking. BMX bicycling and sport/boulder climbing reported significant growth rates of 8.3% and 6.6%, underscoring a strong interest in outdoor activities despite some downturns.

OUTDOOR ACTIVITY PARTICIPANTS						
	2019	2020	2021	2022	1-year change	3-year change
Hiking (Day)	49,697	57,808	58,697	59,578	1.5%	19.9%
Bicycling (Road/Paved Surface)	39,388	44,471	42,775	43,554	1.8%	10.6%
Fishing (Freshwater/Other)	39,185	42,556	40,853	41,821	2.4%	6.7%
Camping	28,183	36,082	35,985	37,431	4.0%	32.8%
Wildlife Viewing More Than 1/4 Mile From Home/Vehicle	20,040	21,038	20,452	20,615	0.8%	2.9%
Camping (RV)	15,426	17,825	16,371	16,840	2.9%	9.2%
Birdwatching More Than 1/4 Mile From Home/Vehicle	12,817	15,228	14,815	15,818	6.8%	23.4%
Fishing (Saltwater)	13,193	14,527	13,790	14,344	4.0%	8.7%
Target Shooting (Handgun)	14,579	14,253	13,952	13,303	-4.6%	-8.8%
Target Shooting (Rifle)	13,197	12,728	12,388	12,044	-2.8%	-8.7%
Hunting (Rifle)	11,084	11,098	10,762	10,811	0.5%	-2.5%
Backpacking Overnight - More Than 1/4 Mile From Vehicle/Home	10,660	10,746	10,306	10,217	-0.9%	-4.2%
Bicycling (Mountain/Non-Paved Surface)	8,622	8,998	8,693	8,916	2.6%	3.4%
Fishing (Fly)	7,014	7,753	7,458	7,631	2.3%	8.8%
Hunting (Shotgun)	8,083	7,874	7,627	7,628	0.0%	-5.6%
Climbing (Indoor)	5,309	5,535	5,684	5,778	1.7%	8.8%
Hunting (Bow)	4,628	4,656	4,577	4,739	3.5%	2.4%
Shooting (Sport Clays)	4,852	4,699	4,618	4,718	2.2%	-2.8%
Bicycling (BMX)	3,648	3,880	3,861	4,181	8.3%	14.6%
Shooting (Trap/Skeet)	4,057	3,837	3,750	3,739	-0.3%	-7.8%
Hunting (Handgun)	3,015	2,998	2,900	2,993	3.2%	-0.8%
Climbing (Sport/Boulder)	2,183	2,290	2,301	2,452	6.6%	12.3%
Climbing (Traditional/Ice/Mountaineering)	2,400	2,456	2,374	2,452	3.3%	2.1%
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 24: National Outdoor Activity Participation

NEXT PRACTICE PARTNERS

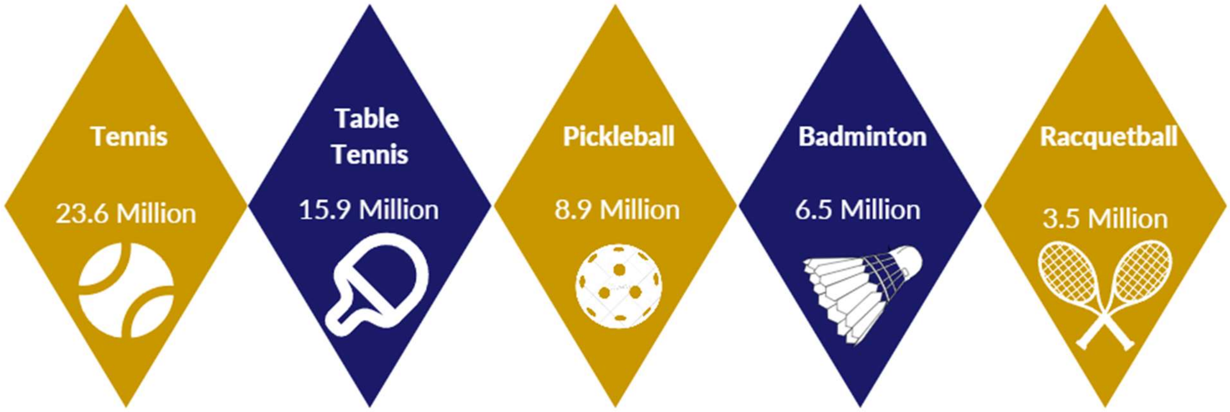

Figure 25: Most Participated in Racquet Sports Nationally

Racquet sports saw a continued upward trend in participation in 2022, with tennis at the forefront, with around 23.6 million participants and marking a 4.3% increase from 2021. This sport also witnessed a significant three-year growth rate of 33.4%.

An even more impressive growth rate was found in pickleball, which experienced an incredible 85.7% increase from 2021, and a stunning 158.6% increase over three years, reflecting its rapidly growing popularity. Meanwhile, other sports like table tennis and badminton also experienced growth in 2022, with 2.8% and 7.1% increases from the previous year respectively.

Racquetball and cardio tennis showed a similar positive trend with 8.0% and 7.8% growth rates from 2021, respectively. Despite its lower participation numbers compared to other racquet sports, squash saw a modest increase of 3.6% from 2021, showing signs of sustained interest. Overall, the data suggests a robust growth in the popularity of racquet sports in 2022.

RACQUET SPORTS PARTICIPANTS

	2019	2020	2021	2022	1-year change	3-year change
Tennis	17,684	21,642	22,617	23,595	**4.3%**	**33.4%**
Table Tennis	14,908	16,854	15,390	15,824	**2.8%**	**6.1%**
Pickleball	3,460	4,199	4,819	8,949	**85.7%**	**158.6%**
Badminton	6,095	5,862	6,061	6,490	**7.1%**	**6.5%**
Racquetball	3,453	3,426	3,260	3,521	**8.0%**	**2.0%**
Cardio Tennis	2,501	2,503	2,608	2,812	**7.8%**	**12.4%**
Squash	1,222	1,163	1,185	1,228	**3.6%**	**0.5%**
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 26: National Racquet Sport Participation

WATER ACTIVITY TRENDS

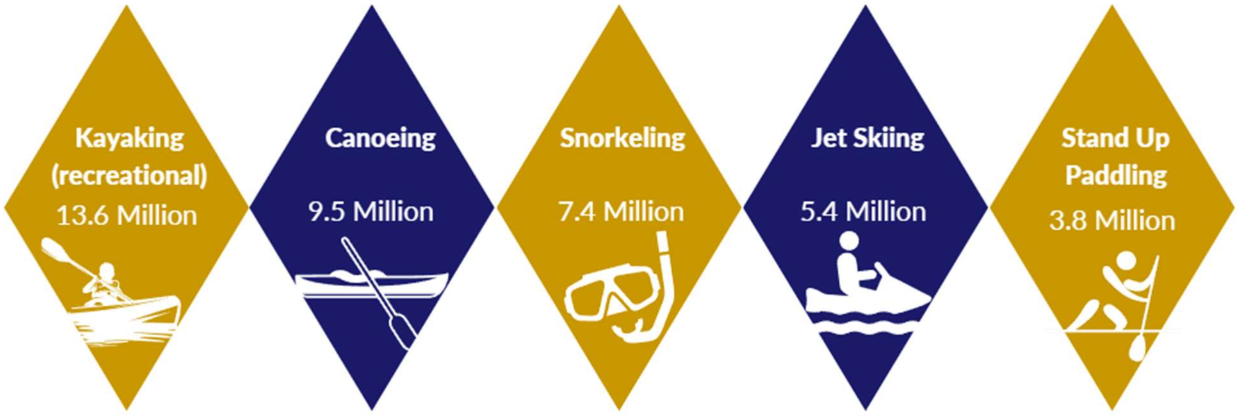

Figure 27: Most Participated in Water Activities Nationally

Water activity participation in 2022 demonstrated a generally positive trend across various sports. Recreational kayaking topped the list with approximately 13.56 million participants, seeing a modest 1.6% increase from the previous year and a significant 19.1% rise over three years.

Canoeing and jet skiing also observed growth in 2022, with participant numbers reaching approximately 9.52 million and 5.44 million, respectively. Canoeing saw a 3.5% increase from 2021, while jet skiing surged by 7.6%.

The popularity of surfing continued to rise, posting a 6.6% increase from 2021 and a notable 24.6% growth over three years. Stand-up paddling and white-water kayaking grew by 1.0% and 3.9% from 2021, respectively.

Sailing, rafting, and wakeboarding saw increases from the previous year, with rafting experiencing a 6.3% increase. Despite the growth, water skiing saw a minor dip of 0.6% from 2021. Scuba diving bounced back from a dip in participation with a 7.3% increase in 2022, although the three-year change remains negative at -2.1%.

Finally, sea/touring kayaking and boardsailing/windsurfing showed minor growth rates from the previous year but have essentially maintained their participant numbers over the last three years.

WATER ACTIVITY PARTICIPANTS

	2019	2020	2021	2022	1-year change	3-year change
Kayaking (Recreational)	11,382	13,002	13,351	13,561	1.6%	19.1%
Canoeing	8,995	9,595	9,199	9,521	3.5%	5.9%
Snorkeling	7,659	7,729	7,316	7,376	0.8%	-3.7%
Jet Skiing	5,108	4,900	5,062	5,445	7.6%	6.6%
Stand Up Paddling	3,562	3,675	3,739	3,777	1.0%	6.0%
Surfing	2,964	3,800	3,463	3,692	6.6%	24.6%
Sailing	3,618	3,486	3,463	3,632	4.9%	0.4%
Rafting	3,438	3,474	3,383	3,595	6.3%	4.5%
Water Skiing	3,203	3,050	3,058	3,040	-0.6%	-5.1%
Wakeboarding	2,729	2,754	2,674	2,754	3.0%	0.9%
Kayaking (White Water)	2,583	2,605	2,623	2,726	3.9%	5.5%
Scuba Diving	2,715	2,588	2,476	2,658	7.3%	-2.1%
Kayaking (Sea/Touring)	2,652	2,508	2,587	2,642	2.1%	-0.4%
Boardsailing/Windsurfing	1,405	1,268	1,297	1,391	7.3%	-0.9%

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

Legend: Large Increase (greater than 10%) | Moderate Increase (0% to 10%) | Moderate Decrease (0% to -10%) | Large Decrease (less than -10%)

Figure 28: National Water Activity Participation

WINTER SPORT TRENDS

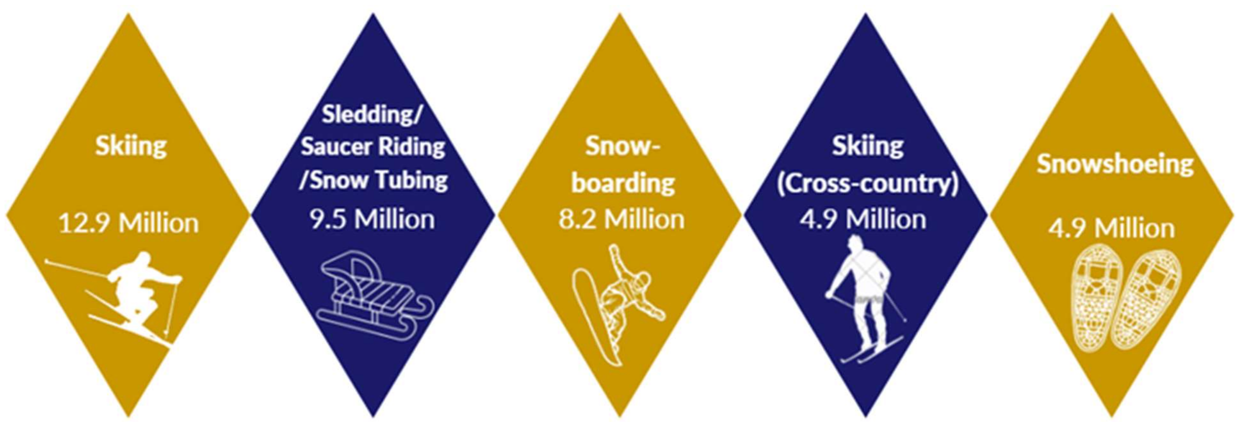

Figure 29: Most Participated in Winter Sports Nationally

Winter sports participation varied in 2022. Notably, the most popular winter sport, Alpine/Downhill/Freeski/Telemark skiing, experienced a 5.7% decrease from the previous year, representing a significant 13.6% decline over the past three years.

However, several other winter sports saw growth in 2022. Sledding, saucer riding, and snow tubing enjoyed a 6.6% increase from 2021, despite a minor 3.8% decline over three years. Snowboarding also witnessed an increase in participants by 2.5% from 2021, and a reasonable 4.6% rise over three years.

Cross-country skiing and snowshoeing both saw a surge in participation. Cross-country skiing increased by 8.5% from 2021, almost reaching its 2019 level, while snowshoeing had a substantial 20.7% increase in the same period, leading to a 12.2% increase over the past three years

Most impressively, snowboard touring experienced the highest growth rate among all winter sports, with a substantial 51.5% increase from 2021, resulting in a three-year growth rate of 45.2%. This trend indicates a burgeoning interest in this specific winter sport.

WINTER SPORT PARTICIPANTS						
	2019	2020	2021	2022	1-year change	3-year change
Skiing (Alpine/Downhill/Freeski/Telemark)	14,884	14,347	13,636	12,864	-5.7%	-13.6%
Sledding/Saucer Riding/Snow Tubing	9,849	9,382	8,887	9,473	6.6%	-3.8%
Snowboarding	7,798	7,885	7,961	8,161	2.5%	4.6%
Skiing (Cross-country)	4,877	4,768	4,470	4,851	8.5%	-0.5%
Snowshoeing	3,421	3,385	3,178	3,837	20.7%	12.2%
Snowmobiling			3,401	3,706	9.0%	
Snowboard Touring	1,487	1,498	1,425	2,159	51.5%	45.2%
NOTE: Participation numbers are in 000's for the US population ages 6 and over						
Legend:	Large Increase (greater than 10%)	Moderate Increase (0% to 10%)	Moderate Decrease (0% to -10%)	Large Decrease (less than -10%)		

Figure 30: National Winter Sport Participation

NEXT PRACTICE PARTNERS

1.5.5 SUMMARY

- **Group Fitness:** Participation in group fitness-based activities continued to struggle but showed some signs of recovery. Boot camp style training, cardio kickboxing, and stationary cycling (group) all increased participation in 2022 but are still significantly down from their 2019 numbers.
- **Health Clubs:** Health club-based activities continued to struggle. Elliptical motion/cross-trainer, stair-climbing machine, stationary cycling (recumbent/upright), and weight resistance machines all had participation decreases last year and are down over 10% compared to 2019 numbers.
- **Golf (on or off-course)**: Golf continues to maintain its momentum. Golf (on or off-course) increased by 9.7 % last year and all forms of golf overall have grown over 20% since 2019.
- **Outdoor Recreation:** Camping, fishing, and bicycling activities recovered to 2020 participation levels after showing slight decreases in 2021.
- **Personal Combat Sports:** Personal combat sports had a good year. Martial Arts, boxing for fitness, MMA for competition, MMA for fitness, and wrestling all posted participation increases in 2022.
- **Racquet Sports:** For the first time since 2015, every racquet sport increased its total participation number compared to the previous year.
    - **Pickleball** continued to be the fastest-growing sport in America. Participation almost doubled in 2022, increasing by 85.7% year-over-year and by an astonishing 158.6% over three years.
    - Tennis increased by 4.3% last year and has grown over 20% since 2019.
- **Running and Hiking:** For the fifth straight year, trail running and hiking (day) total participation increased.
- **Team Sports:** Basketball, soccer (outdoor), football (flag), and football (tackle) all posted positive three-year total participation increases of over 4.5%. Basketball had the highest three-year increase of 13.0%.
- **Yoga, Barre and Pilates:** Barre and Pilates showed solid participation increases in 2022, while yoga decreased for the first time in the last decade. All have three-year participation increases with yoga and Pilates increasing over 10% in the last three years.