



APPENDIX B – NATIONAL TRENDS

TRENDS ANALYSIS

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 nearly 110 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.

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.

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 include touch football (-25%), wrestling (-22%), slow pitch softball (-16%), and racquetball (24.9% decrease).

Overall, activities in the general sports categories show very promising growth in the most recent year. Only three activities experienced a dip in participation, but none of these 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 | 14-15 | 10-15 |
| Golf | 26,122 | 24,700 | 24,120 | -2.3% | -7.7% |
| Basketball | 25,156 | 23,067 | 23,410 | 1.5% | -6.9% |
| Tennis | 18,719 | 17,904 | 17,963 | 0.3% | -4.0% |
| Baseball | 14,198 | 13,152 | 13,711 | 4.3% | -3.4% |
| Soccer (Outdoor) | 13,883 | 12,592 | 12,646 | 0.4% | -8.9% |
| Badminton | 7,645 | 7,176 | 7,198 | 0.3% | -5.8% |
| Softball (Slow Pitch) | 8,477 | 7,077 | 7,114 | 0.5% | -16.1% |
| Football, Touch | 8,663 | 6,586 | 6,487 | -1.5% | -25.1% |
| Volleyball (Court) | 7,315 | 6,304 | 6,423 | 1.9% | -12.2% |
| Football, Tackle | 6,850 | 5,978 | 6,222 | 4.1% | -9.2% |
| Football, Flag | 6,660 | 5,508 | 5,829 | 5.8% | -12.5% |
| Soccer (Indoor) | 4,920 | 4,530 | 4,813 | 6.2% | -2.2% |
| Volleyball (Sand/Beach) | 4,752 | 4,651 | 4,785 | 2.9% | 0.7% |
| Gymnastics | 4,418 | 4,621 | 4,679 | 1.3% | 5.9% |
| Ultimate Frisbee | 4,571 | 4,530 | 4,409 | -2.7% | -3.5% |
| Track and Field | 4,383 | 4,105 | 4,222 | 2.9% | -3.7% |
| Racquetball | 4,603 | 3,594 | 3,883 | 8.0% | -15.6% |
| Cheerleading | 3,134 | 3,456 | 3,608 | 4.4% | 15.1% |
| Ice Hockey | 2,140 | 2,421 | 2,546 | 5.2% | 19.0% |
| Pickleball | N/A | 2,462 | 2,506 | 1.8% | N/A |
| Softball (Fast Pitch) | 2,513 | 2,424 | 2,460 | 1.5% | -2.1% |
| Lacrosse | 1,423 | 2,011 | 2,094 | 4.1% | 47.2% |
| Wrestling | 2,536 | 1,891 | 1,978 | 4.6% | -22.0% |
| Roller Hockey | 1,374 | 1,736 | 1,907 | 9.9% | 38.8% |
| Squash | 1,031 | 1,596 | 1,710 | 7.1% | 65.9% |
| Field Hockey | 1,182 | 1,557 | 1,565 | 0.5% | 32.4% |
| Boxing for Competition | 855 | 1,278 | 1,355 | 6.0% | 58.5% |
| Rugby | 940 | 1,276 | 1,349 | 5.7% | 43.5% |
| NOTE: Participation figures are in 000's for the US population ages 6 and over | | | | | |
| | Large Increase (greater than 25%) | Moderate Increase (0% to 25%) | Moderate Decrease (0% to -25%) | Large Decrease (less than -25%) | |



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 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 | 14-15 | 10-15 |
| Swimming (Fitness) | N/A | 25,304 | 26,319 | 4.0% | N/A |
| Aquatic Exercise | 8,947 | 9,122 | 9,226 | 1.1% | 3.1% |
| Swimming (Competition) | N/A | 2,710 | 2,892 | 6.7% | N/A |
| NOTE: Participation figures are in 000's for the US population ages 6 and over | | | | | |
| | 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

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 nearly 110 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 million), running/jogging (48 million), hand weights (43 million), stretching (36 million), and stationary cycling (36 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 | 14-15 | 10-15 |
| Fitness Walking | 112,082 | 112,583 | 109,829 | -2.4% | -2.0% |
| Treadmill | 52,275 | 50,241 | 50,398 | 0.3% | -3.6% |
| Running/Jogging | 46,650 | 51,127 | 48,496 | -5.1% | 4.0% |
| Free Weights (Hand Weights) under 15 lbs | N/A | 41,670 | 42,799 | 2.7% | N/A |
| Stretching | 35,720 | 35,624 | 35,776 | 0.4% | 0.2% |
| Stationary Cycling (Recumbent/Upright) | 36,036 | 35,693 | 35,553 | -0.4% | -1.3% |
| Weight/Resistant Machines | 39,185 | 35,841 | 35,310 | -1.5% | -9.9% |
| Free Weights (Dumbbells) over 15 lbs | N/A | 30,767 | 31,409 | 2.1% | N/A |
| Elliptical Motion Trainer | 27,319 | 28,025 | 27,981 | -0.2% | 2.4% |
| Free Weights (Barbells) | 27,194 | 25,623 | 25,381 | -0.9% | -6.7% |
| Yoga | 20,998 | 25,262 | 25,289 | 0.1% | 20.4% |
| Calisthenics/Bodyweight Exercise | N/A | 22,390 | 22,146 | -1.1% | N/A |
| Choreographed Exercise | N/A | 21,455 | 21,487 | 0.1% | N/A |
| Aerobics (High Impact) | 14,567 | 19,746 | 20,464 | 3.6% | 40.5% |
| Stair Climbing Machine | 13,269 | 13,216 | 13,234 | 0.1% | -0.3% |
| Cross-Training Style Workout | N/A | 11,265 | 11,710 | 4.0% | N/A |
| Stationary Cycling (Group) | 7,854 | 8,449 | 8,677 | 2.7% | 10.5% |
| Pilates Training | 8,404 | 8,504 | 8,594 | 1.1% | 2.3% |
| Trail Running | 4,985 | 7,531 | 8,139 | 8.1% | 63.3% |
| Cardio Cross Trainer | N/A | 7,484 | 7,982 | 6.7% | N/A |
| Boot Camp Style Cross-Training | N/A | 6,774 | 6,722 | -0.8% | N/A |
| Cardio Kickboxing | 6,287 | 6,747 | 6,708 | -0.6% | 6.7% |
| Martial Arts | 6,002 | 5,364 | 5,507 | 2.7% | -8.2% |
| Boxing for Fitness | 4,788 | 5,113 | 5,419 | 6.0% | 13.2% |
| Tai Chi | 3,193 | 3,446 | 3,651 | 5.9% | 14.3% |
| Barre | N/A | 3,200 | 3,583 | 12.0% | N/A |
| Triathlon (Traditional/Road) | 1,593 | 2,203 | 2,498 | 13.4% | 56.8% |
| Triathlon (Non-Traditional/Off Road) | 798 | 1,411 | 1,744 | 23.6% | 118.5% |

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

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 million), freshwater fishing (38 million), day hiking (37 million), and Camping within ¼ mile of vehicle/home (28 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 | 14-15 | 10-15 |
| Bicycling (Road) | 39,730 | 39,725 | 38,280 | -3.6% | -3.6% |
| Fishing (Freshwater) | 39,911 | 37,821 | 37,682 | -0.4% | -5.6% |
| Hiking (Day) | 32,534 | 36,222 | 37,232 | 2.8% | 14.4% |
| Camping (< 1/4 Mile of Vehicle/Home) | 32,667 | 28,660 | 27,742 | -3.2% | -15.1% |
| Wildlife Viewing (>1/4 Mile of Home/Vehicle) | 21,158 | 21,110 | 20,718 | -1.9% | -2.1% |
| Camping (Recreational Vehicle) | 16,651 | 14,633 | 14,699 | 0.5% | -11.7% |
| Birdwatching (>1/4 mile of Vehicle/Home) | 13,317 | 13,179 | 13,093 | -0.7% | -1.7% |
| Fishing (Saltwater) | 12,056 | 11,817 | 11,975 | 1.3% | -0.7% |
| Backpacking Overnight | 7,998 | 10,101 | 10,100 | 0.0% | 26.3% |
| Archery | 6,323 | 8,435 | 8,378 | -0.7% | 32.5% |
| Bicycling (Mountain) | 7,152 | 8,044 | 8,316 | 3.4% | 16.3% |
| Skateboarding | 7,080 | 6,582 | 6,436 | -2.2% | -9.1% |
| Fishing (Fly) | 5,523 | 5,842 | 6,089 | 4.2% | 10.2% |
| Roller Skating, In-Line | 8,128 | 6,061 | 6,024 | -0.6% | -25.9% |
| Climbing (Sport/Indoor/Boulder) | 4,542 | 4,536 | 4,684 | 3.3% | 3.1% |
| Adventure Racing | 1,214 | 2,368 | 2,864 | 20.9% | 135.9% |
| Bicycling (BMX) | 2,090 | 2,350 | 2,690 | 14.5% | 28.7% |
| Climbing (Traditional/Ice/Mountaineering) | 2,017 | 2,457 | 2,571 | 4.6% | 27.5% |
| NOTE: Participation figures are in 000's for the US population ages 6 and over | | | | | |
| | Large Increase (greater than 25%) | Moderate Increase (0% to 25%) | Moderate Decrease (0% to -25%) | Large Decrease (less than -25%) | |

NATIONAL TRENDS IN HUNTING / FISHING ACTIVITIES

Overall, activities related to hunting and fishing have seen strong participation growth in recent years. In 2015, the most popular of these activities in terms of total participants were freshwater fishing (38 million), target shooting with a handgun (16 million), and target shooting with a rifle (14 million).

Examining growth trends over the last five years, activities with the highest rate of growth were hunting with a handgun (36%), archery (up 33%), target shooting with a handgun (26%), and trap / skeet shooting (25%). Since 2010, only two activities underwent a decrease in participation - freshwater fishing (-6%) and saltwater fishing (-1%). Activities experiencing the most rapid growth over the most recent year include sport clay shooting (15%), trap / skeet shooting (25%), and hunting with a handgun (10%).

| National Participatory Trends - Hunting / Fishing Activities | | | | | |
|--|--------------------------------------|-------------------------------------|--------------------------------------|------------------------------------|-------|
| Activity | Participation Levels | | | % Change | |
| | 2010 | 2014 | 2015 | 14-15 | 10-15 |
| Fishing (Freshwater) | 39,911 | 37,821 | 37,682 | -0.4% | -5.6% |
| Target Shooting (Handgun) | 12,485 | 14,426 | 15,744 | 9.1% | 26.1% |
| Target Shooting (Rifle) | 12,637 | 13,029 | 13,720 | 5.3% | 8.6% |
| Fishing (Saltwater) | 12,056 | 11,817 | 11,975 | 1.3% | -0.7% |
| Hunting (Rifle) | 10,632 | 10,081 | 10,778 | 6.9% | 1.4% |
| Hunting (Shotgun) | 8,276 | 8,220 | 8,438 | 2.7% | 2.0% |
| Archery | 6,323 | 8,435 | 8,378 | -0.7% | 32.5% |
| Fishing (Fly) | 5,523 | 5,842 | 6,089 | 4.2% | 10.2% |
| Shooting (Sport Clays) | 4,291 | 4,645 | 5,362 | 15.4% | 25.0% |
| Hunting (Bow) | 4,067 | 4,411 | 4,564 | 3.5% | 12.2% |
| Shooting (Trap/Skeet) | 3,489 | 3,837 | 4,368 | 13.8% | 25.2% |
| Hunting (Handgun) | 2,493 | 3,091 | 3,400 | 10.0% | 36.4% |
| NOTE: Participation figures are in 000's for the US population ages 6 and over | | | | | |
| | Large Increase (greater than 25%) | Moderate Increase (0% to 25%) | Moderate Decrease (0% to -25%) | Large Decrease (less than -25%) | |