

NRPA Facility Market Report

Analysis of:
National Recreation and Park Association
22377 Belmont Ridge Road
Ashburn, VA 20148

Park and recreation agencies offer a diverse set of offerings and program activities to meet the needs of their communities. But the offerings that work well for one agency, or even one part of an agency's service area, may not be the best fit elsewhere. As a result, park and recreation professionals seek information and insights that empower them to make decisions on the optimal program and service offerings for their communities.

In your hands is the **NRPA Facility Market Report** for the National Recreation and Park Association. This report offers an array of data that provides your agency with a greater understanding of the residents served by the facility, with a particular focus on their habits and interests.

Key Findings About the National Recreation and Park Association:

57,630

Number of residents living within a ten-minute drive of the facility per Census 2010

32.6

Median age of residents living within a ten-minute drive of the facility per Census 2010

26.3%

Percentage of adult population living within a ten-minute drive of the facility that exercise at least six hours per week

Figure 1: Map of Three, Five and Ten Minute Drives from the Facility

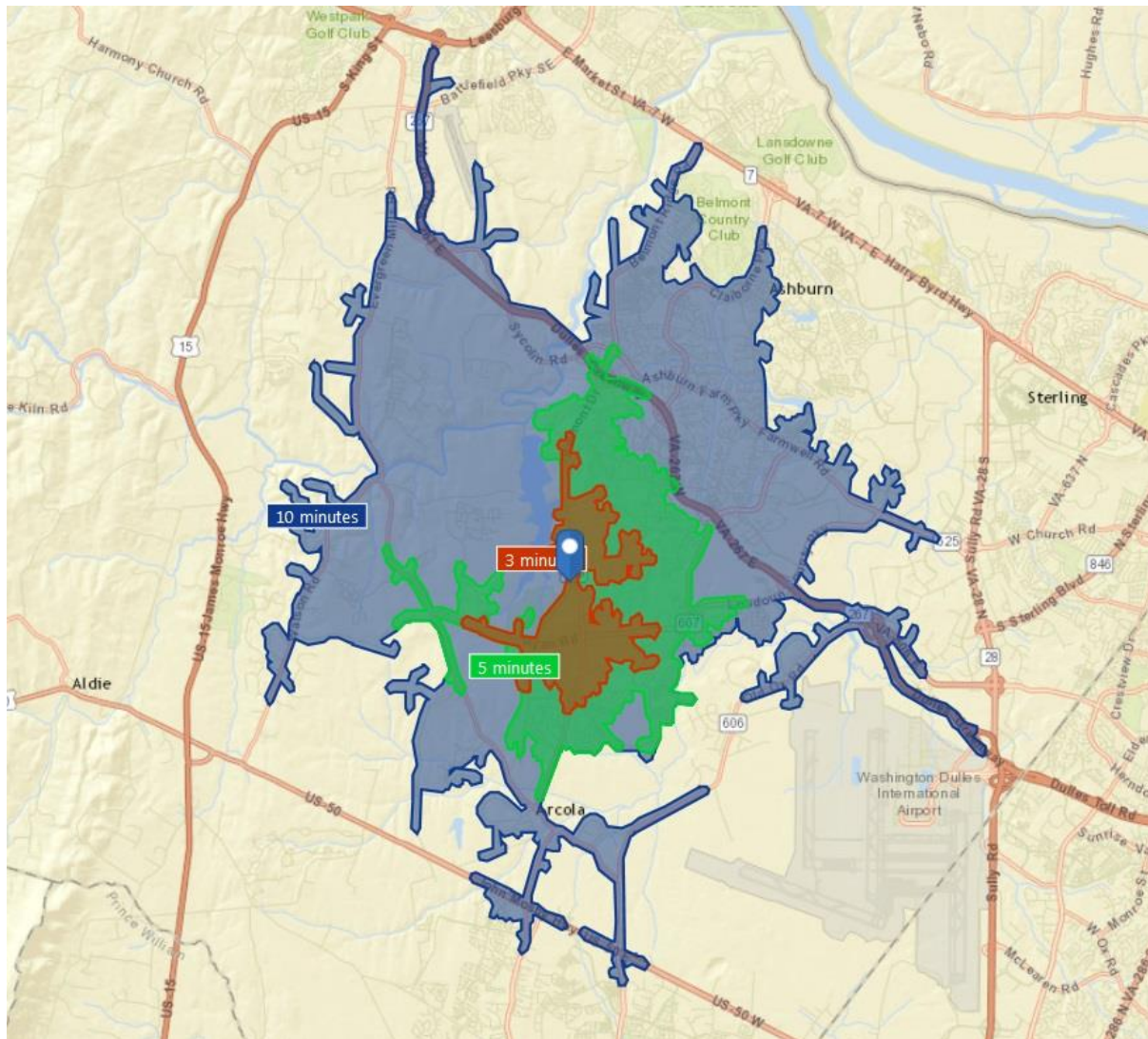


Figure 1 illustrates the physical accessibility, in terms of driving times, of the National Recreation and Park Association. The highlighted areas show the driving times of the facility, broken down into three (brown), five (green) and ten (blue) minute estimated drive time intervals. Although usage and constituent population will vary by the facility type, the ten-minute drive time area is presented as a *general* guideline on the size of the population most likely to visit the facility. That is, those residing within the area shaded blue may represent the most likely users of common facilities such as recreation and community centers, athletic fields, playgrounds, tennis courts, senior centers and aquatic facilities.

About the Residents Who Live Within a 10 Minute Drive of the Facility

Figure 2: 2010 Census Data and 2015 & 2020 Forecast Data of People Residing Within a 10 Minute Drive of the Facility

Summary	Census 2010	2015 Forecast	2020 Forecast
Population	57,630	77,397	96,922
Households	18,455	24,597	30,693
Families	14,925	19,709	24,437
Average Household Size	3.12	3.15	3.16
Owner Occupied Homes	15,139	19,871	24,875
Renter Occupied Homes	3,316	4,726	5,817
Median Age	32.6	33.3	33.3

Figure 2 summarizes Census data of the residents living within a ten-minute drive of the facility, including population, household formation and home ownership status. The 2010 data represents actual United States Census data, while the 2015 and 2020 figures are projections developed by Esri. The projections are based on forecasts for births, deaths, international and domestic migration and other factors that influence population shifts. These projections, which naturally are subject to revision, assist your agency in its planning of future programming at the facility over the coming years.

Figure 3: Forecasted Age Trends of People Residing Within a Ten-Minute Drive of the Facility

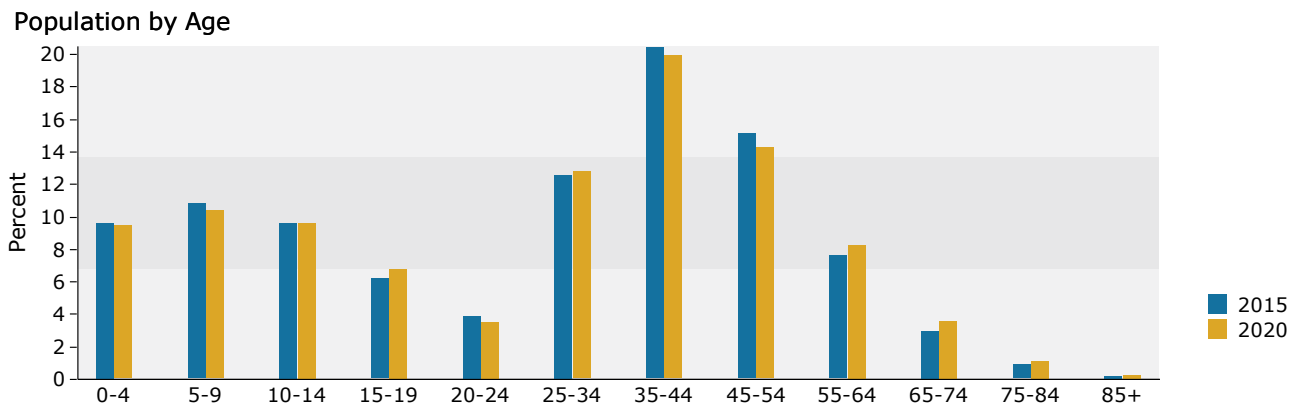


Figure 4: Census 2010 Data and Forecasted Age Trends of People Residing Within a Ten-Minute Drive of the Facility

Population by Age	Census 2010		2015 Forecast		2020 Forecast	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	6,093	10.6%	7,450	9.6%	9,179	9.5%
5 - 9	6,310	10.9%	8,367	10.8%	10,037	10.4%
10 - 14	5,084	8.8%	7,426	9.6%	9,332	9.6%
15 - 19	3,431	6.0%	4,835	6.2%	6,586	6.8%
20 - 24	1,643	2.9%	3,027	3.9%	3,369	3.5%
25 - 34	8,754	15.2%	9,726	12.6%	12,410	12.8%
35 - 44	12,792	22.2%	15,885	20.5%	19,322	19.9%
45 - 54	8,538	14.8%	11,687	15.1%	13,819	14.3%
55 - 64	3,383	5.9%	5,847	7.6%	8,079	8.3%
65 - 74	1,084	1.9%	2,287	3.0%	3,494	3.6%
75 - 84	409	0.7%	680	0.9%	1,032	1.1%
85+	111	0.2%	181	0.2%	263	0.3%

Figures 3 and 4 provide an age distribution of the population living with a ten-minute drive of the facility by age groups, as reported in United States Census and American Community Survey (ACS) data.

Note that the age ranges are not of equal size. The age groups ranging from birth to 24 years old are grouped into five-year increments, ages 25 to 84 are grouped into ten-year increments and individuals 85 years and older are placed into a single age group.

From a recreation programming and planning perspective, the classification of youth and young adults into small age groups aid your agency with programing decisions for children and young adults. Whereas adults within a ten-year age range (e.g., ages 35 to 44) may likely share similar recreation interests, the similarly large size age groups may not make as much sense for children and young adults. For example, recreation interests of five year olds have few similarities of those of 15 year olds. Hence, the five-year age ranges for the younger age groupings provide your agency with more valuable insights about the relative size of the youth population when considering their recreation needs.

Personal Interests, Activities and Spending Habits

Figures 5 - 8 summarize the personal interests, activities, and spending habits of residents living within a ten-minute drive of the facility. These tables include predictors of recreation activity and spending that better inform programming decision making for your facility.

Pay particular attention to the Market Potential Index, or MPI. The MPI represents the relative likelihood of adults living near your facility to engage in a particular activity in comparison to the U.S. average. This measure is indexed to 100, so that an MPI greater than 100 indicates a greater than average likelihood (relative to the whole U.S.) to participate in the activity while an MPI less than 100 suggests a less than average likelihood to engage in the activity.

Figure 5: Weekly Exercise Habits of People Residing Within a Ten-Minute Drive of the Facility

	Expected Number of Adults	Percent	MPI
Spends 6+ hours exercising per week	13,401	26.3%	116
Spends 3-5 hours exercising per week	13,746	27.0%	124
Spends 1-2 hours exercising per week	10,537	20.7%	103

Figure 5 shows the weekly exercise habits for people within a ten-minute drive of your facility. The percentages are the proportion of adults living within a ten-minute drive of the facility that exercise one to two, three to five or six-plus a week. An MPI value greater of 100 indicates a greater percentage of the adult population living within a ten-minute drive of the facility exercises one to two, three to five or six-plus hours a week versus the U.S. as a whole.

Figure 6: Participation Rates of Select Recreation Activities of People Residing Within a Ten-Minute Drive of the Facility

	Expected Number of Adults	Percent	MPI
Participated in aerobics in last 12 months	6,505	12.8%	143
Participated in basketball in last 12 months	4,303	8.5%	102
Participated in yoga in last 12 months	5,551	10.9%	152
Participated in weight lifting in last 12 months	7,503	14.7%	139
Participated in tennis in last 12 months	3,212	6.3%	148
Participated in soccer in last 12 months	2,318	4.6%	121

Figure 6 presents data on the level of adult participation in select recreation activities among residents living within a ten-minute drive of the facility. Using this data, you can estimate the interests of residents in your facility's service area, helping inform programming planning decisions.

Figure 7: Social Media Usage of People Residing Within a Ten-Minute Drive of the Facility

	Expected Number of Adults	Percent	MPI
Facebook	31,406	61.7%	119
YouTube	24,926	49.0%	120
Twitter	5,231	10.3%	112

Figure 7 shows the level of social media usage of adult residents that reside within a ten-minute drive of your facility. Understanding the social media habits of the residents living near the facility informs your agency on the potential efficacy of social media channels in supporting marketing strategies for the facility’s programming and services.

Figure 8: Spending Habits on Recreation Activities of People Residing Within a Ten-Minute Drive of the Facility

	Spending Potential Index	Average Annual Amount Spent	Total
Total Spent on Entertainment/Recreation Fees and Admissions	270	\$1,746.92	\$42,968,975
- Admission to Movies, Theater, Opera, Ballet	253	\$416.55	\$10,245,982
- Admission to Sporting Events	261	\$173.51	\$4,267,880
- Fees for Participant Sports	278	\$335.55	\$8,253,584
- Fees for Recreational Lessons	288	\$353.80	\$8,702,422
- Membership Fees for Social/Recreation/Civic Clubs	272	\$466.40	\$11,471,995

Figure 8 summarizes the spending habits of nearby residents on recreation activities by presenting the Spending Potential Index (SPI) and average annual spending on select recreation and leisure activities. Similar to the MPI, the SPI is indexed such that a reading of 100 represents average spending among all U.S. households. Hence, a reading above 100 means residents living within a ten-minute drive of the facility spends more on average on the particular activity relative to the U.S. as a whole.

While all of the leisure activities presented in the table may not be relevant to your facility, these data provide your agency with guidance on the leisure interests of your patrons, as well as their ability/willingness to pay for those experiences. For example, a population that has a higher than average SPI for “Fees for Recreational Lessons” may indicate a significant opportunity—and/or a greater willingness to pay—for high quality fee-based recreation programs at your facility.

Final Thoughts

While the information within this report is not intended to be indicative of the entire population served by the National Recreation and Park Association, it gives your agency insights on the potential market for the facility with a particular focus on those living within a ten-minute drive. One note of caution: the analysis provided within this report is meant to be for informational purposes only and does not represent a recommendation by NRPA for the facility's operations.

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