



Demographic and Recreation Trends Analysis

Demographic Analysis

Demographic Analysis provides an understanding of the population within Indianapolis-Marion County, Indiana. This analysis is reflective of the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

In addition to the analysis at the city-county level, the consulting team also examined similar demographic characteristics for each of the nine townships within Indianapolis-Marion County. Understanding the demographic features at the township level is important in providing a more detailed analysis of the service area that will lead to better delivery of programs and services specific to each township. The nine individual townships that comprise Indianapolis-Marion County are:

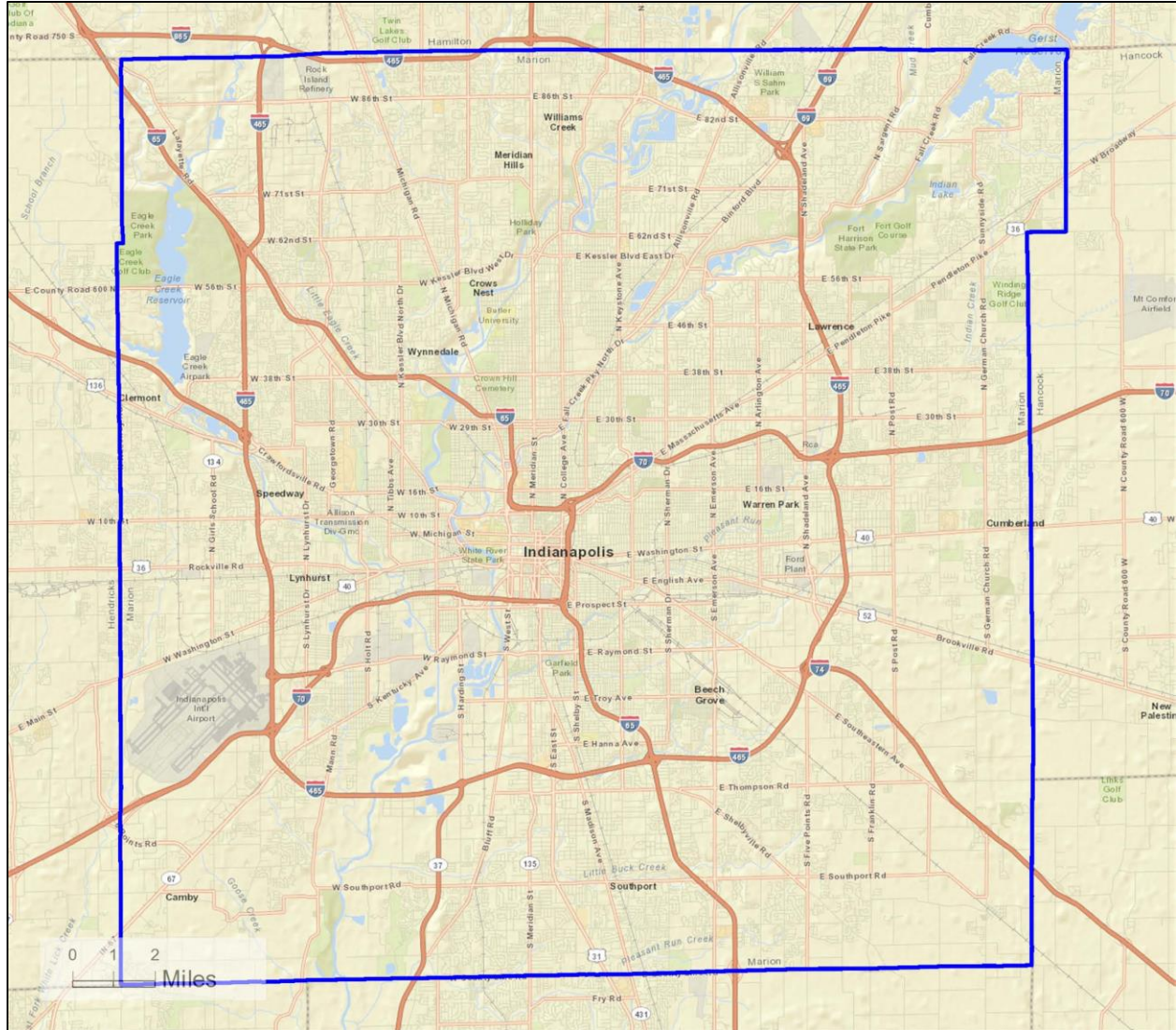
- Center Township
- Decatur Township
- Franklin Township
- Lawrence Township
- Perry Township
- Pike Township
- Warren Township
- Washington Township
- Wayne Township

It is important to note that future projections are all based on historical patterns and unforeseen circumstances. As the study is conducted, changes in demographic data may have a significant bearing on the validity of the final projections.

Methodology

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends.

All data was acquired in March 2015 and reflects actual numbers as reported in the 2010 Census and estimates for 2014 and 2019 as obtained by ESRI. Straight line linear regression was utilized for projected 2024 and 2029 demographics. The Indianapolis-Marion County geographic boundary was utilized as the demographic analysis boundary shown below.





Race and Ethnicity Definitions

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

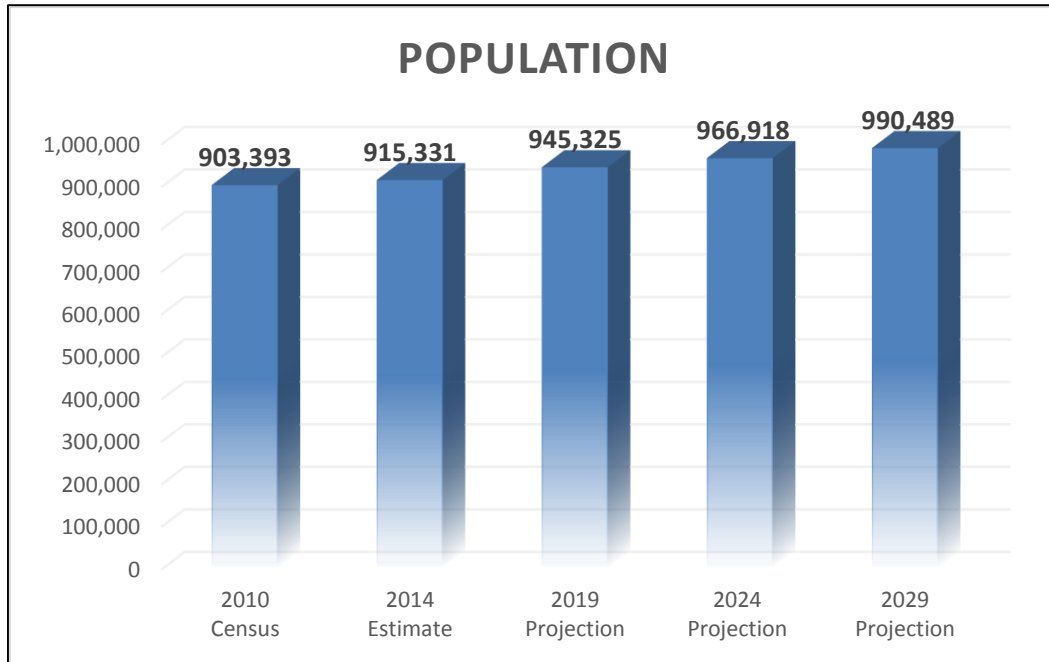
- American Indian – This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian – This includes a person having origins in any of the original peoples of the Far East, 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 Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race



Indianapolis-Marion County Populace

Population

City of Indianapolis has observed minimal growth in recent years. From 2010 to 2014, the target area’s total population experienced a slight increase of 1.3% or an annual rate of 0.3%. This is less than half of the national population growth average, which is around 0.7% annually. Projecting ahead, the City’s population is expected to continue to slowly grow over the next 15 years. Based on predictions through 2029, the target area is expected to have approximately 990,393 residents living within 366,176 households.

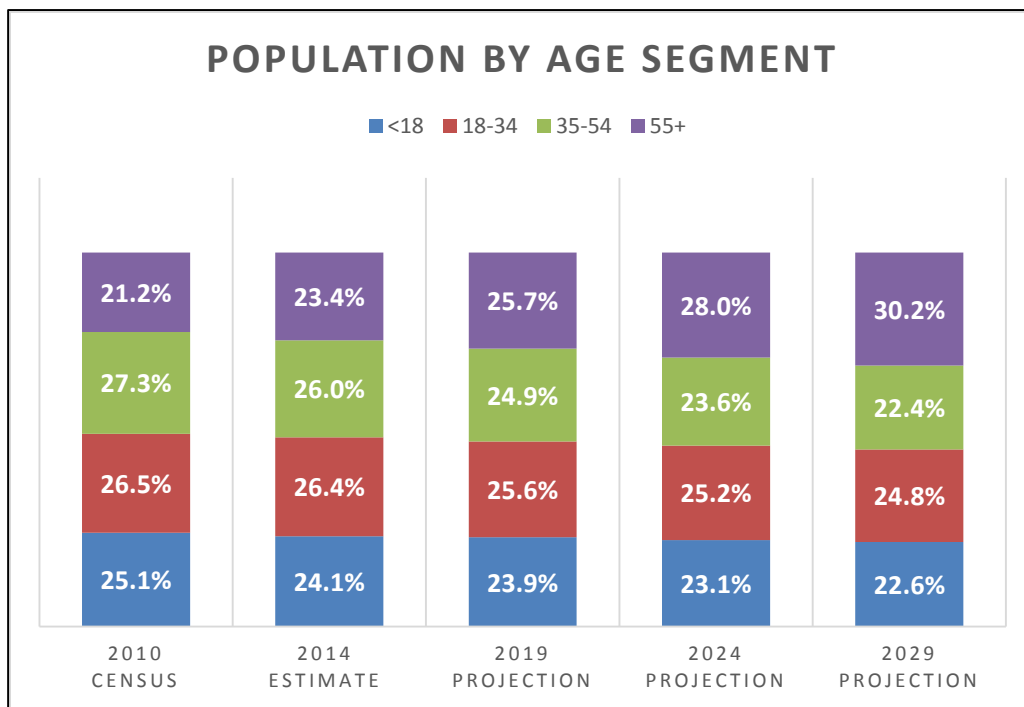




AGE SEGMENT

When evaluating the distribution by age, Indianapolis-Marion County is fairly balanced across the four major age segments. In 2014, the highest segments by population are the 18-34 and 35-54 age groups, which each represent approximately 26% of the total. The smallest segment in 2014 is the <18 group, which constitutes over 23% of the population.

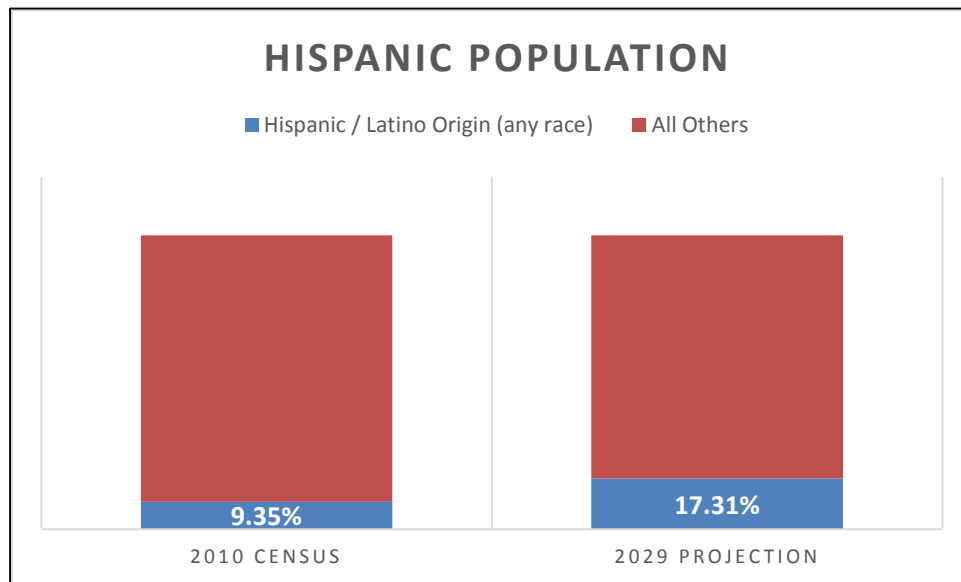
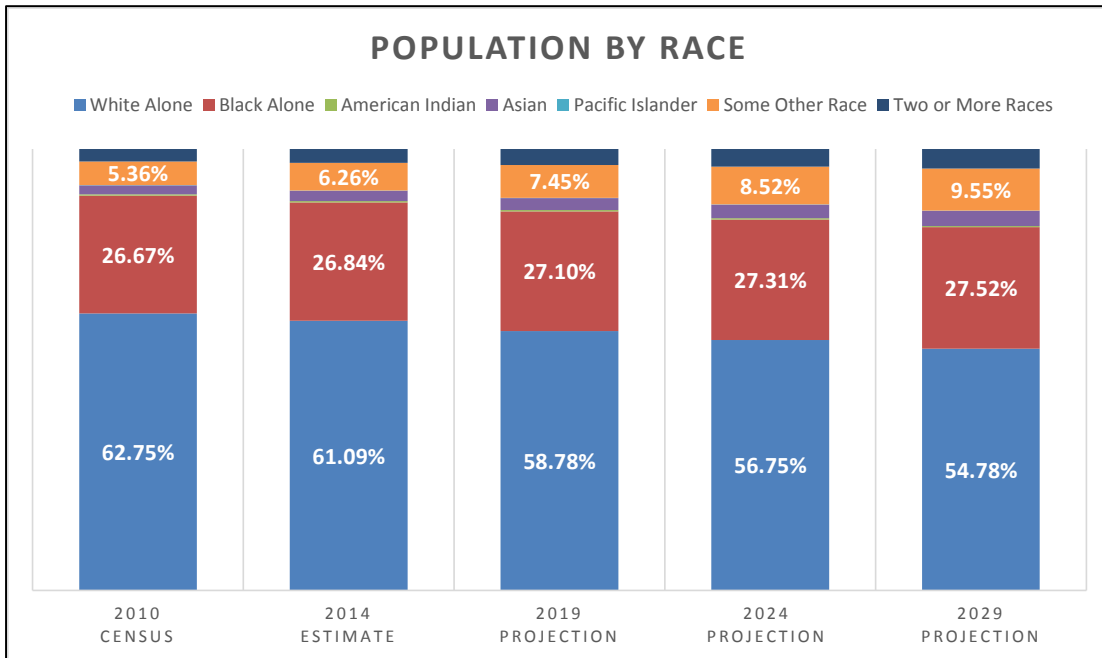
Over the next 15 years, the City is expected to undergo an aging trend. Future projections through 2029 predict that the 55+ population will gradually increase in size, while all other age segments slowly decrease. The 55+ segment is expected to represent approximately 30% of the population by 2029, while the three younger segments fall between 22%-25% of the total. This is consistent with general national trends where the 55+ age group has been growing as a result of increased life expectancies and the baby boomer population entering that age group.





RACE AND ETHNICITY

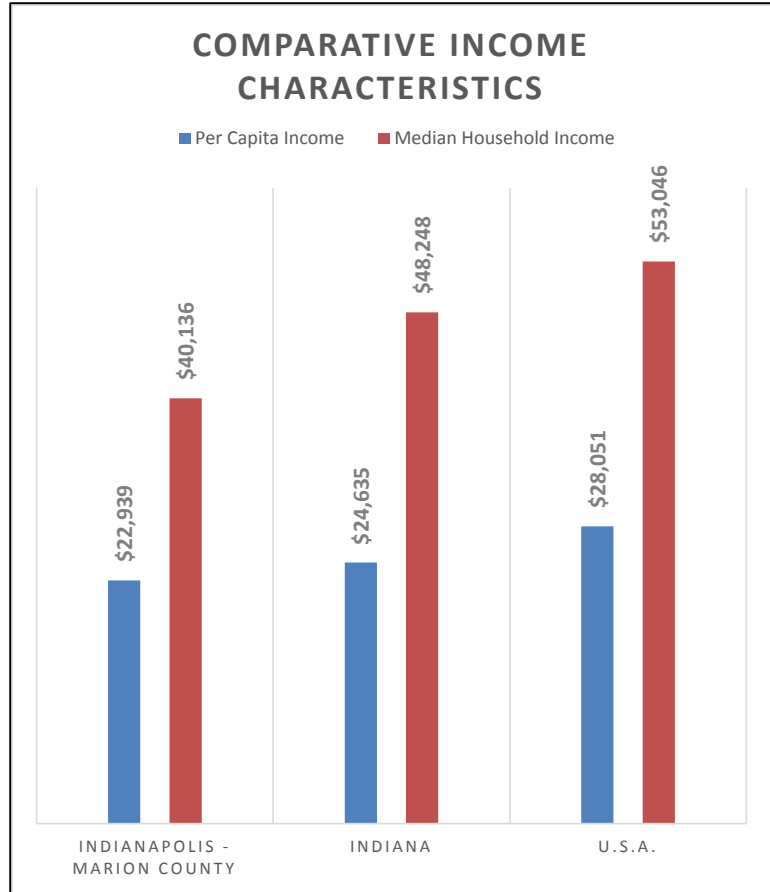
When analyzing race and ethnicity, the service area is somewhat diverse. The 2014 estimate shows that the majority of the population identifies as White Alone (61.09%), with Black Alone (26.84%) representing the largest minority. Projections for 2029 expect the City to experience a slight shift in racial composition, with the majority White Alone population dropping to 55%, while Black Alone remains steady as the largest minority (28%) and Some Other Race (10%) expects the most rapid growth among all racial segments. Those of Hispanic/Latino Origin are expected to experience significant growth based on future projections, from 9% of the 2010 population to 17% by 2029.





Income Comparative

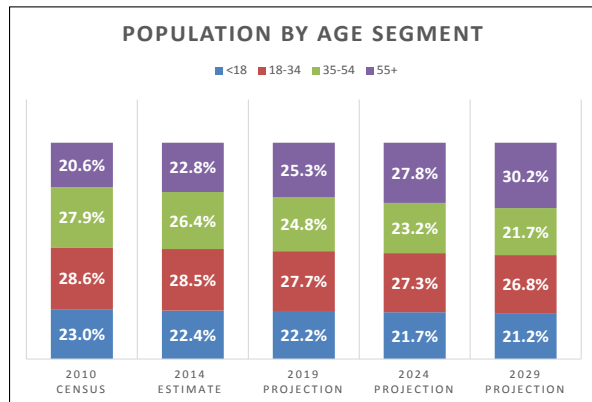
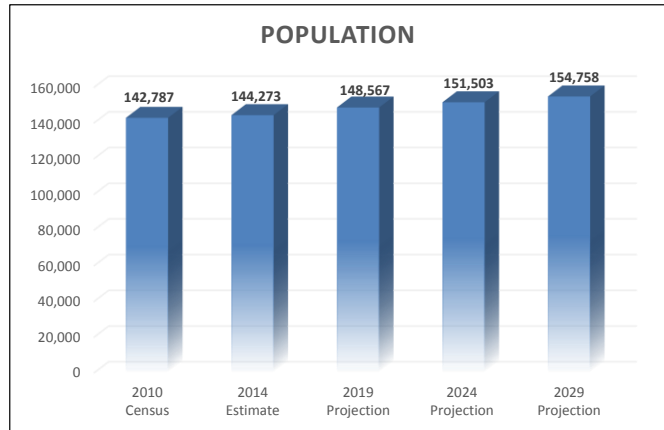
Indianapolis-Marion County's median household income of \$40,136 is well below the state (\$48,248) and national (\$53,046) averages. The target area's Per Capita Income of \$22,939 is also below the state (\$24,635) and national (\$28,051) averages.



Center Township

Population

The population of Center Township is estimated to be 144,273 in 2014, which comprises 15.8% of the estimated population for all of Marion County. The population of Center Township underwent minimal growth (0.25% annually) from 2010 to 2014. Projections for 2029 expect the Township's population to reach 154,758 residents living within 64,357 households.

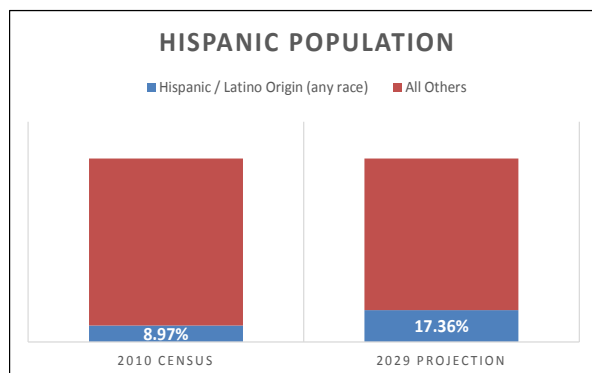
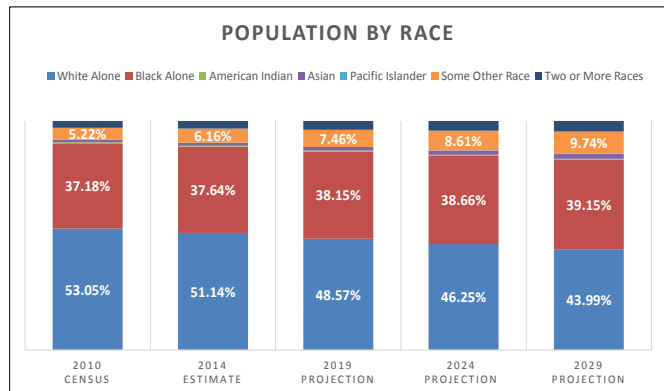


Age Segments

In 2014, Center Township is fairly evenly distributed between the major age segments. Projections over the next 15 years expect that the population will undergo an aging trend, as the 55+ group will be the only segment experiencing growth, climbing to over 30% of the population by 2029.

Race and Ethnicity

The Township is somewhat diverse, as the White Alone represents just over half of the population in 2014, while Black Alone (37.64%) and Some Other Race (6.16%) representing the largest minorities. By 2029, the Township is expected to become more diverse, with the White Alone dropping to 44% and steady growth expected from Black Alone and Some Other Race.

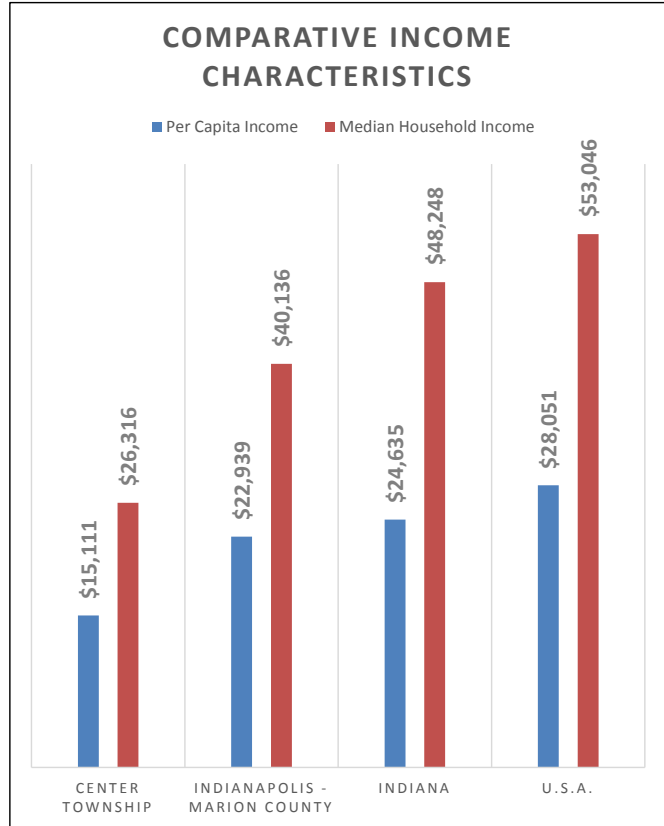


Projections through 2029 expect those of Hispanic/Latino ethnicity will nearly double from the 2010 Census data and represent over 17% of the Township's population.



Income Comparative

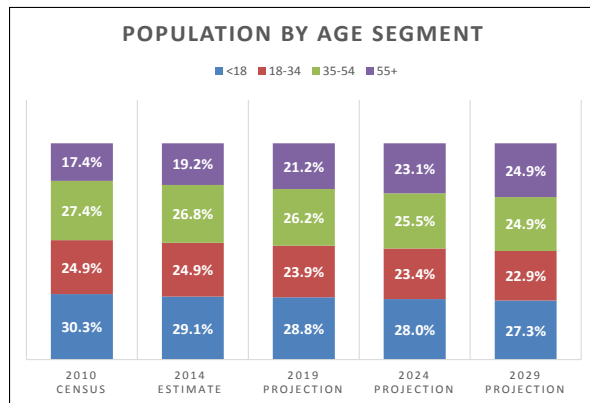
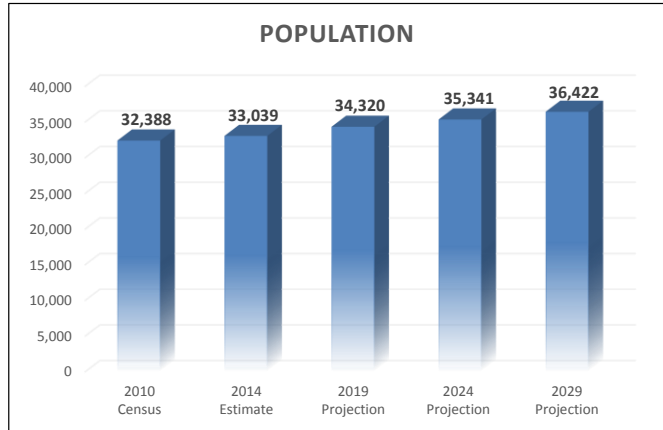
In 2014, median household income for Center Township was \$26,316 and per capita income was \$15,111. Both median household income and per capita income are well below county, state, and national levels.



Decatur Township

Population

The population of Decatur Township is estimated to be 33,039 in 2014, which represents 3.6% of the estimated population for all of Marion County. The population of Decatur Township increased slightly from the 2010 Census data at an annual growth rate of 0.5%. Based on projections through 2029, the Township's population is expected to reach 36,422 residents living within 12,708 households.

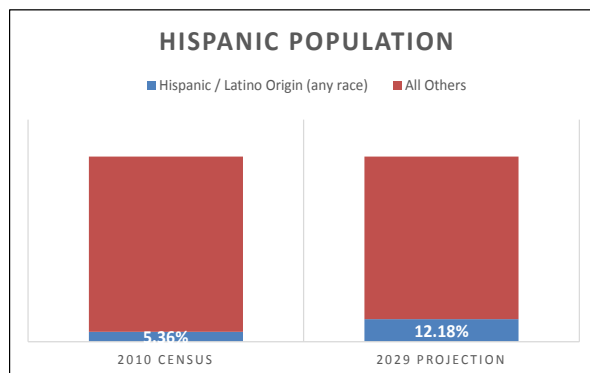
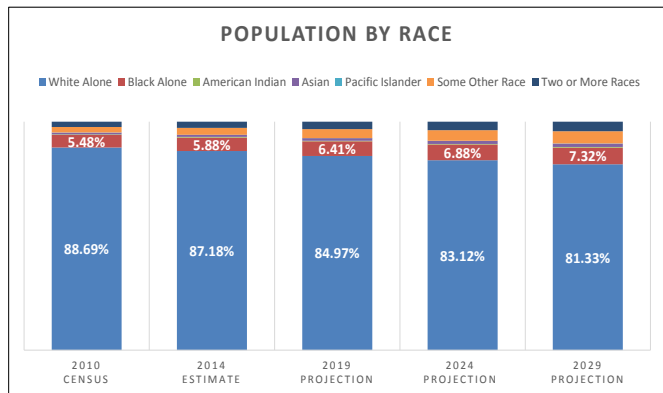


Age Segments

Based on 2014 estimates, Decatur Township is slightly skewed toward the younger age segments, with the <18 being the largest and the 55+ as the smallest segment. Projections over the next 15 years expect that the population will undergo an aging trend, as the 55+ group will be the only segment experiencing growth. This will result in a fairly balanced distribution among the four major age segments by 2029.

Race and Ethnicity

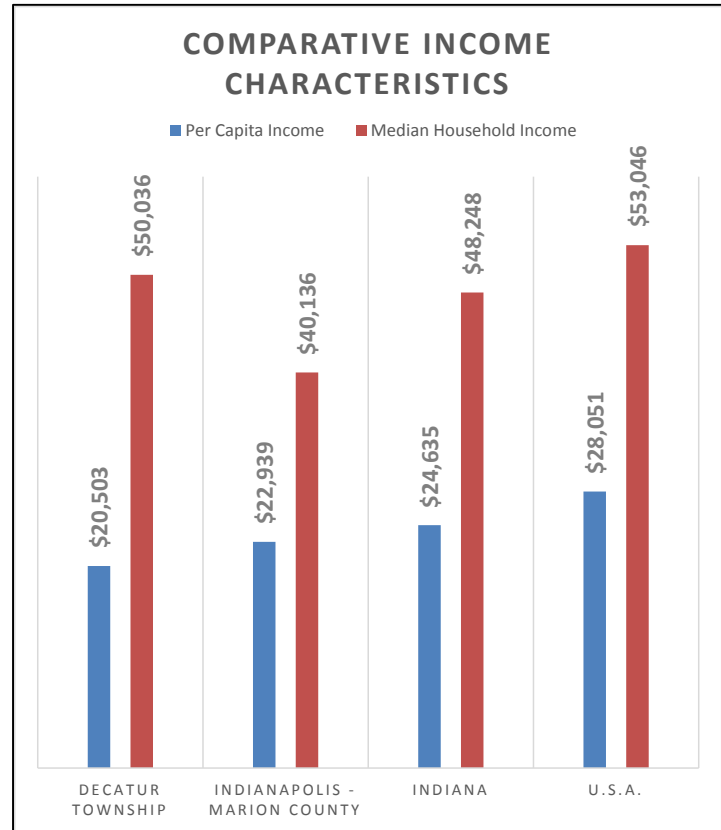
The target area is very limited in its diversity, as the Township is predominately White Alone (87.19%) in 2014, with Black Alone (5.88%) representing the largest minority. By 2029, the population is predicted to slowly become more diverse, with the White Alone dropping to 81% and small growth expected from Black Alone, Some Other Race, and Two or More Races.



Projections through 2029 expect those of Hispanic/Latino ethnicity will more than double from the 2010 Census data to represent over 12% of the Township's populatio.

Income Comparative

In 2014, Decatur Township’s median household income was \$50,036 and per capita income was \$20,503. Comparatively, median household income is higher than county and state levels, but falls below the national level, while per capita income is below county, state, and national levels.

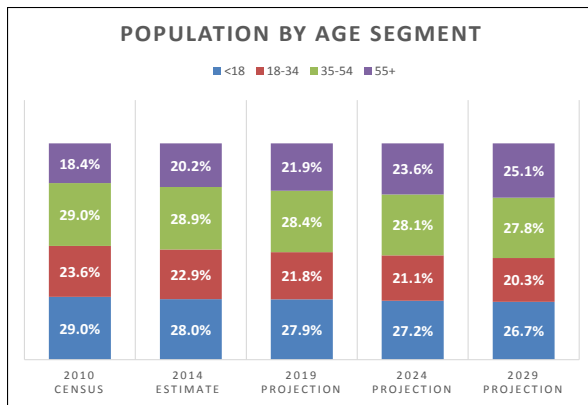
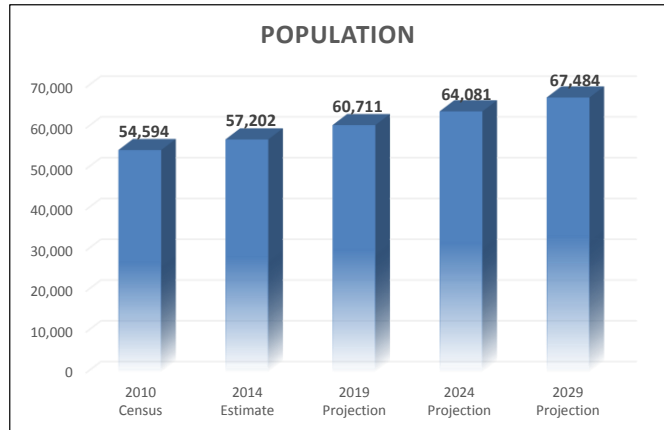




Franklin Township

Population

The population of Franklin Township is estimated to be 57,202 in 2014, which represents 6.2% of Marion County. The population of Franklin Township underwent rapid growth of 1.2% annually from 2010 to 2014. Projections for 2029 expect the Township's population to continue growing to reach 67,484 residents living within 24,527 households.

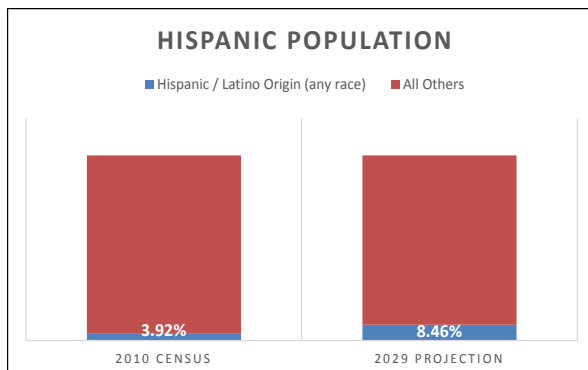
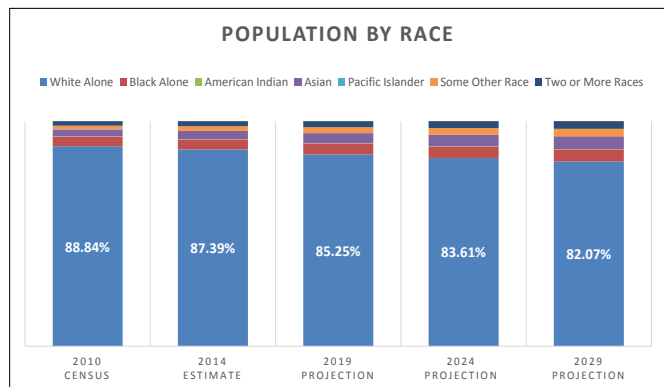


Age Segments

The current estimate shows the Township is somewhat balanced between age segments, with the 35-54 and <18 representing the largest groups. Projections over the next 15 years demonstrate a slow aging trend, as the 55+ group is the lone segment expected to experience growth.

Race and Ethnicity

Franklin Township is very limited in diversity, as the White Alone makes up close to 90% of the population in 2014, while Black Alone (4.51%) is the largest minority. Projections for 2029 expect the Township to become slightly more diverse, with the White Alone dropping to 82% and minimal increases among multiple minority groups.

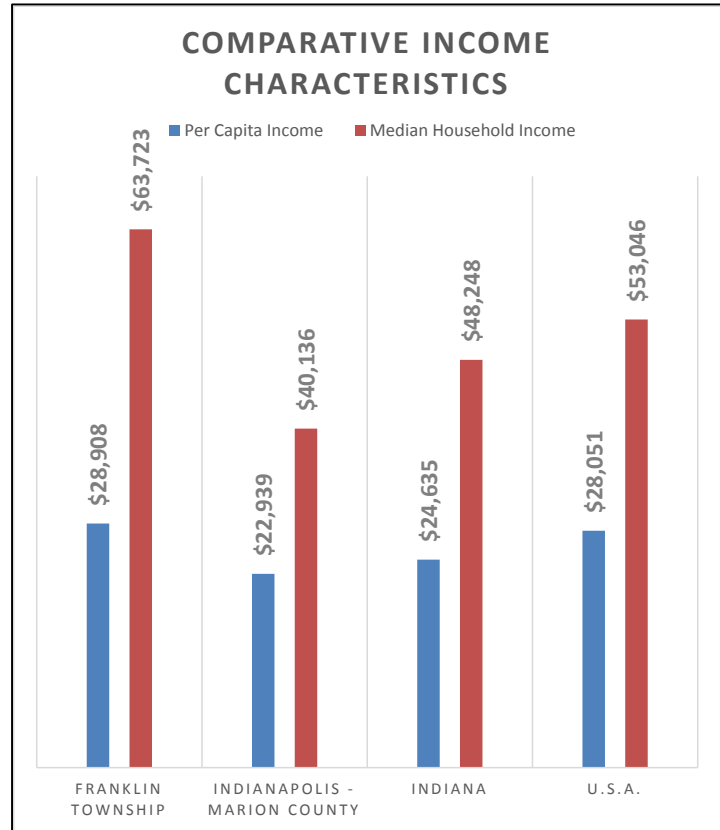


By 2029, residents identifying as Hispanic / Latino are expected to more than double in size from figures reported in the 2010 Census.



Income Comparative

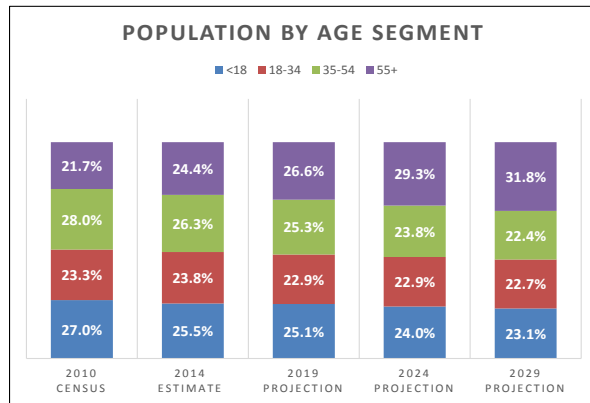
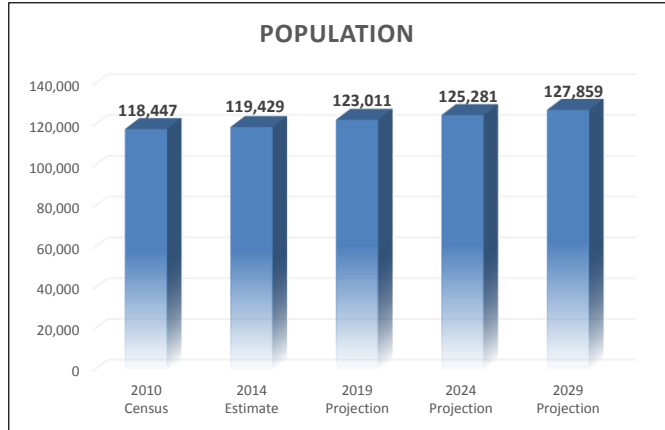
Based on current estimates, median household income for Franklin Township was \$63,723 and per capita income was \$28,908, which are the highest of any township in Marion County. Franklin's income characteristics are above county, state, and national levels.



Lawrence Township

Population

The estimated population of Lawrence Township was 119,429 in 2014, which represents 13% of Marion County residents. The population of underwent minimal growth of 0.2% annually from 2010 to 2014. Projections for 2029 expect the Township's population to continue to slowly increase and reach 127,859 residents living within 50,931 households.

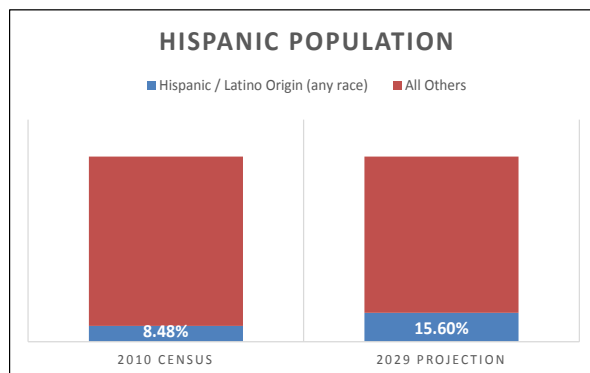
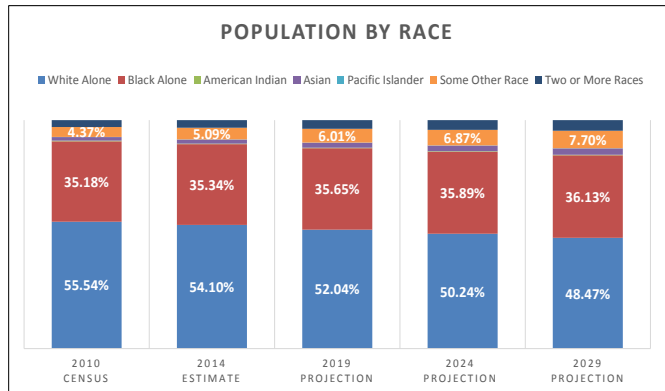


Age Segments

The current estimate depicts the Township as balanced between the four major age segments, with the 35-54 representing the largest group. Projections over the next 15 years demonstrate an aging trend, as the 55+ segment is the only group expected to increase its percentage of the overall population.

Race and Ethnicity

Lawrence Township is somewhat diverse, with the White Alone as the largest racial segment (54.1%) in 2014, while Black Alone (35.34%) is the largest minority. Projections through 2029 expect the Township to slowly diversify, with the White Alone decreasing to 48% and steady growth from the Black Alone (36.13%) and Some Other Race (7.7%) segments.

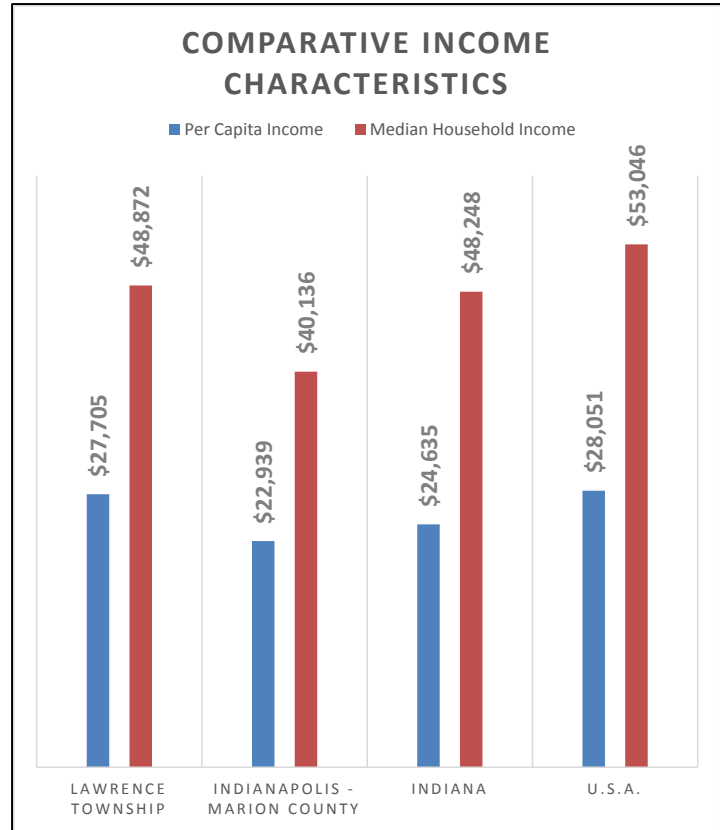


By 2029, residents identifying as Hispanic / Latino are expected to nearly double their representation from figures reported in the 2010 Census.



Income Comparative

Based on current estimates, median household income for Lawrence Township was \$48,872 and per capita income was \$27,705. Median household income and per capita income for the Township are above the county and state averages, but fall below the national level.

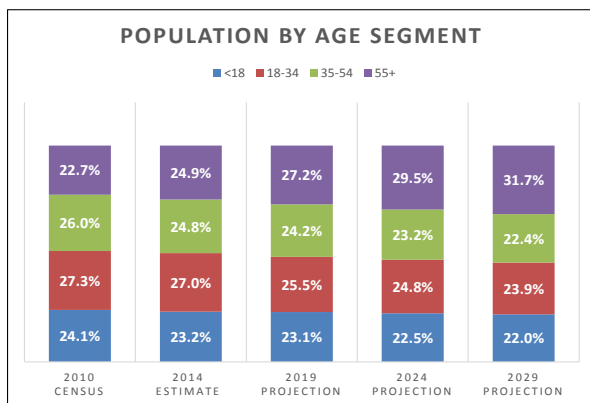
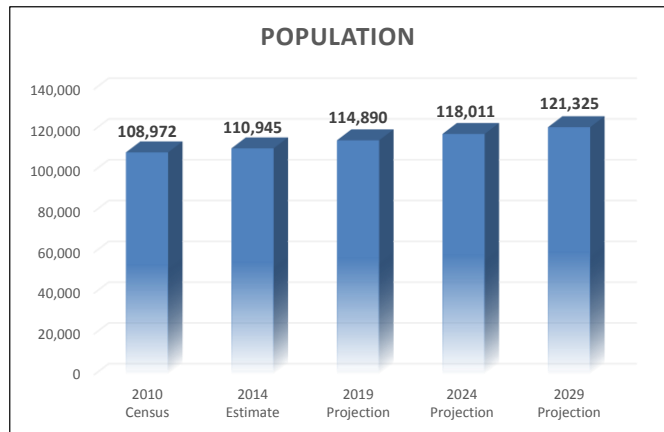




Perry Township

Population

The estimated population of Perry Township was 110,945 in 2014, which represents 12% of Marion County residents. The population of underwent growth of 0.45% annually from 2010 to 2014. Projections for 2029 expect the Township's population to continue to increase to 121,325 residents living within 48,616 households.

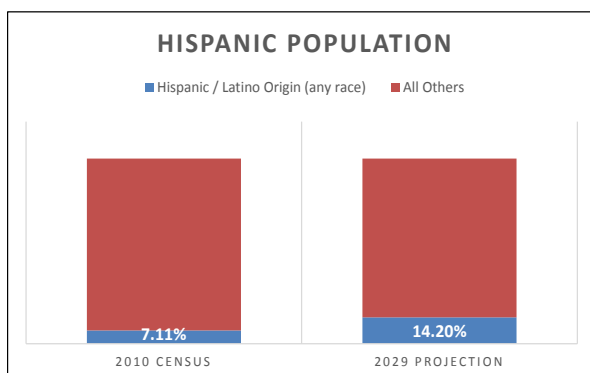
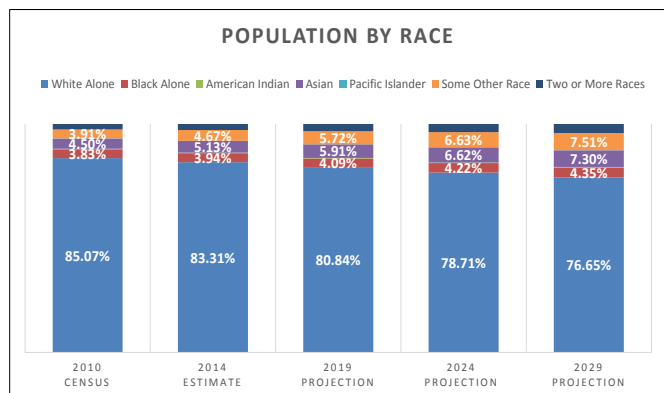


Age Segments

The current estimate depicts the Township as somewhat balanced between age segments, with the 18-34 representing the largest group. Projections over the next 15 years expect the Township to slowly age, as the 55+ segment is the lone segment expected to experience growth.

Race and Ethnicity

Perry Township is limited in its diversity, as the population is predominately White Alone (83.31%), while Asian (5.13%) is the largest minority. Projections through 2029 expect the Township to slowly become more diverse, with the White Alone decreasing to 79% and steady growth from the Some Other Race (7.51%) and Asian (7.3%) segments.

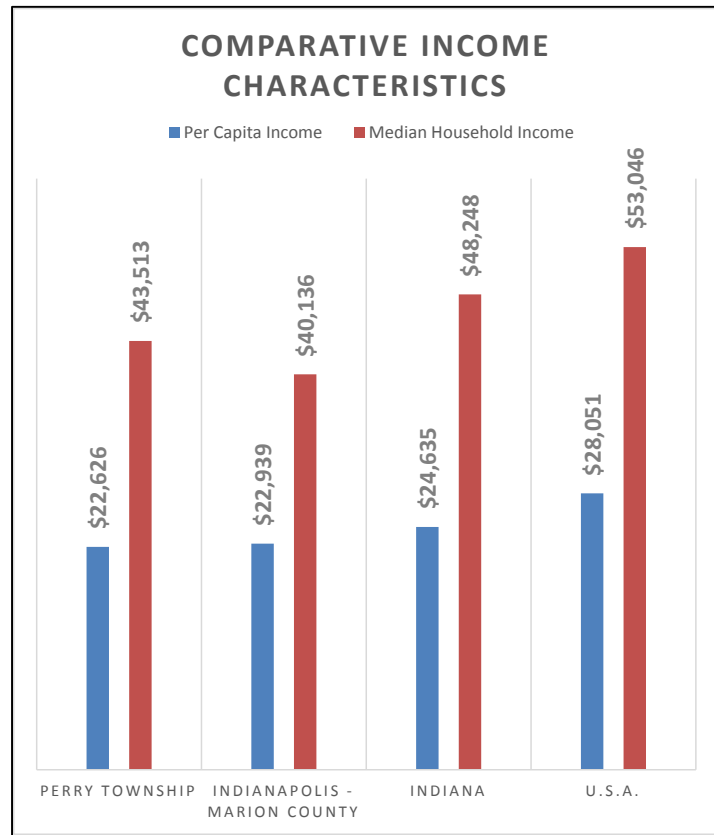


By 2029, residents identifying as Hispanic / Latino are expected to double their representation from figures reported in the 2010 Census.



Income Comparative

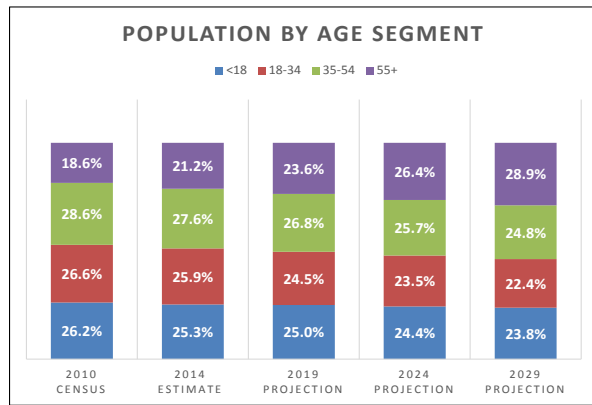
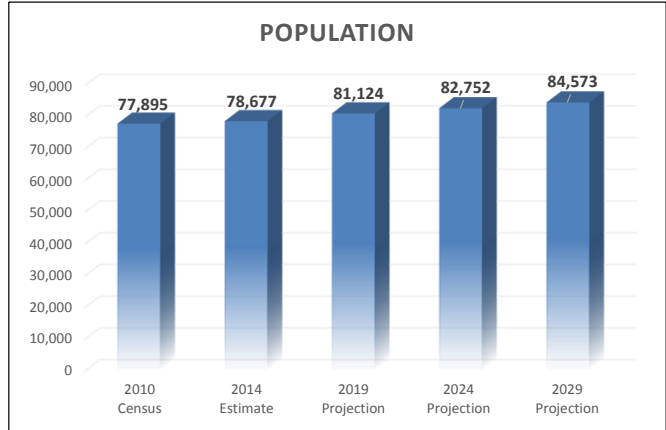
Based on current estimates, median household income for Perry Township was \$43,513 and per capita income was \$22,626. Median household income for the Township is above the county average, but below state and national levels, while per capita income falls below the county, state, and national levels.



Pike Township

Population

The population of Pike Township is estimated to be 78,677 in 2014, which represents 8.60% of the estimated population for all of Marion County. The Township's population increased slightly from the 2010 Census data at an annual growth rate of 0.25%. Based on projections through 2029, the population is expected to continue to increase to 84,573 residents living within an expected 35,077 households.

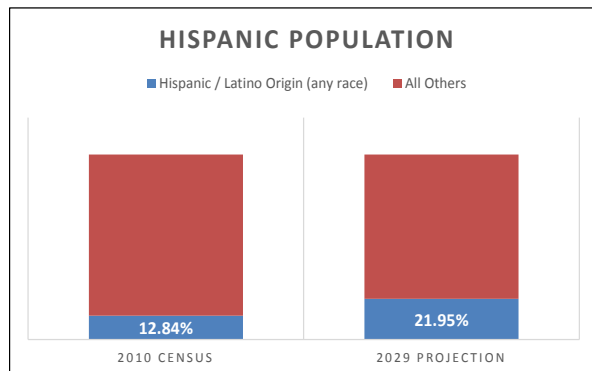
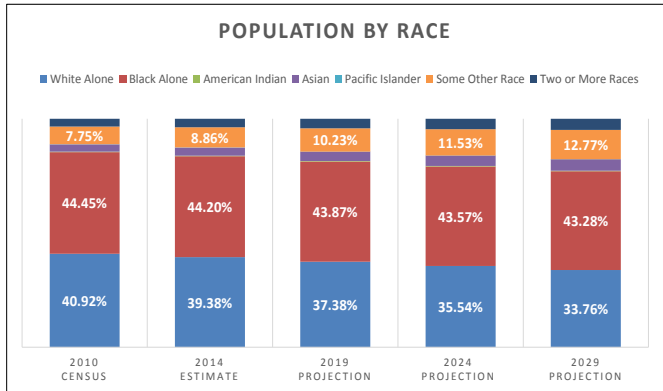


Age Segments

Based on 2014 estimates, Pike Township has a somewhat even distribution among the four age segments; with the 55+ group trailing slightly. Projections over the next 15 years expect that the population will undergo an aging trend, as the 55+ category experiences strong growth to nearly 29% of the Township's total population. This will result in small decreases within the three youngest age groups by 2029.

Race and Ethnicity

The target area is fairly diverse, as the Township is primarily split between two main race segments- Black Alone (44.20%) and White Alone (39.38%). Collectively, these two groups represent nearly 84% of the population in 2014. By 2029, the population is forecasted to become even more diverse, with the Some Other Race category climbing to 12.77%.

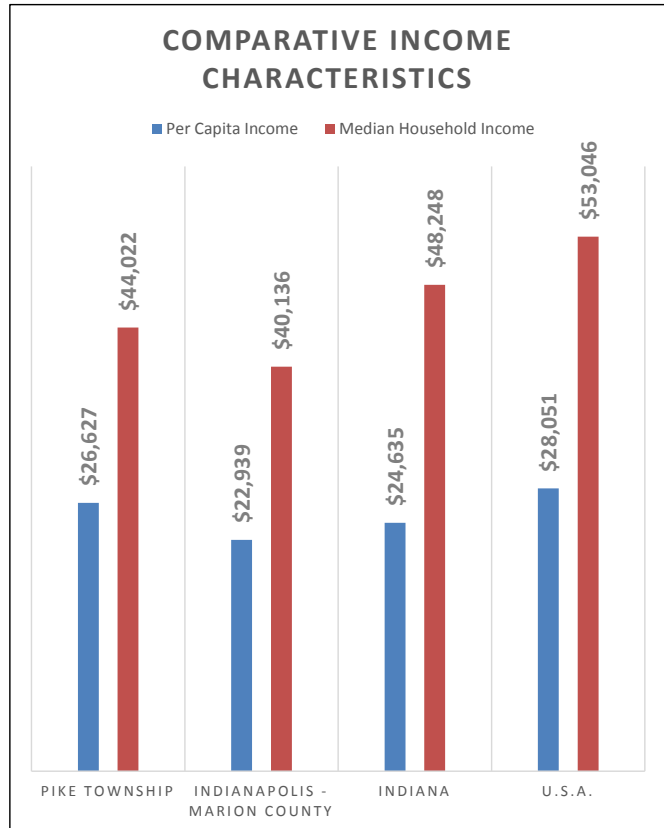


Looking forward to 2029, the Hispanic/Latino population is projected to grow and is expected to represent just under 22% of the Township's total population.



Income

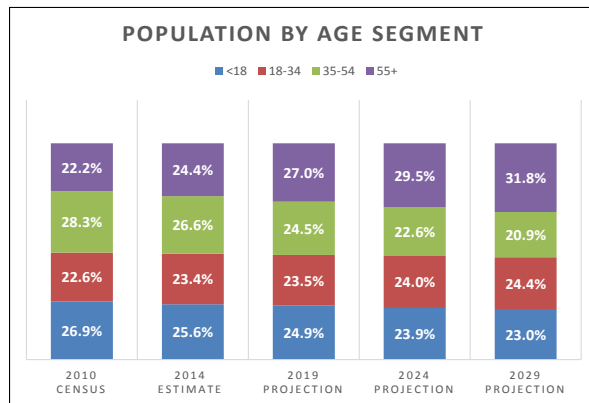
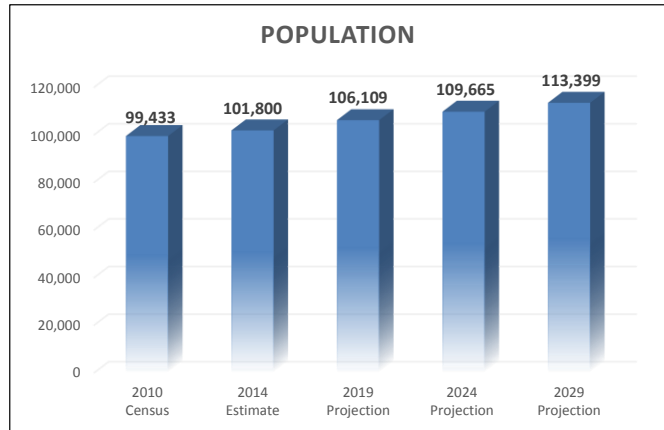
In 2014, Pike Township’s median household income was \$44,022 and per capita income was \$26,627. Comparatively, median household income is higher than the Marion County average, but falls below the state and national levels, while per capita income is above county and state levels, but falls short of the national average.



Warren Township

Population

The population of Warren Township is estimated to be 101,800 in 2014, which represents 11.1% of the estimated population for all of Marion County. The population of Warren Township increased moderately from the 2010 Census data at an annual growth rate of 0.6%. Based on projections through 2029, the Township's population is expected to reach 113,399 residents living within 44,021 households.

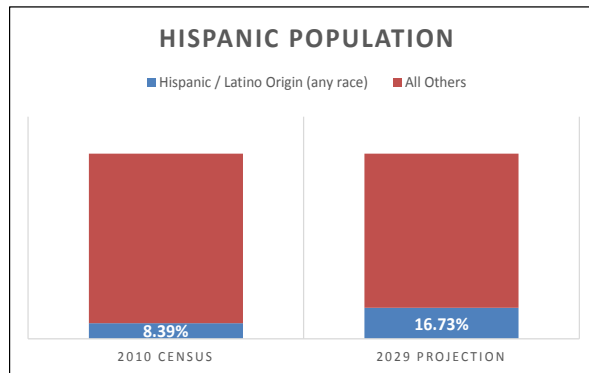
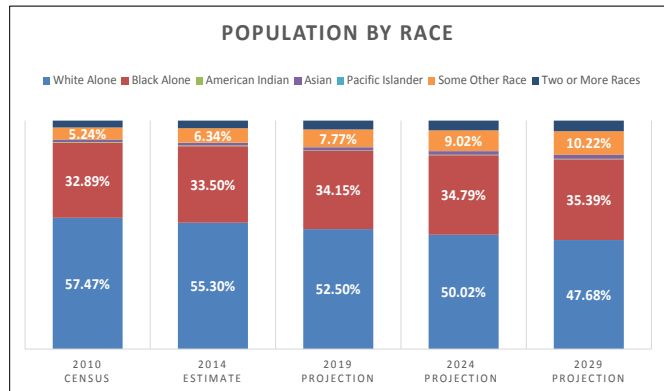


Age Segments

Based on 2014 estimates, Warren Township is evenly distributed among the four major age segments; all falling within the 23%-27% range. Projections over the next 15 years expect that the population will undergo an aging trend, as the 35-54 group decreases most rapidly and the 55+ group expects a strong increase. This will result in a slightly skewed distribution among the four major age segments by 2029, with the 55+ segment being the largest.

Race and Ethnicity

The target area is rather diverse, with the Township's predominate race being White Alone (55.3%) in 2014, and Black Alone (33.5%) representing the largest minority. By 2029, the population is predicted to become even more diverse, with the White Alone dropping to 47.68%, while Black Alone, Some Other Race, and Two or More Races all experiencing slight growth.

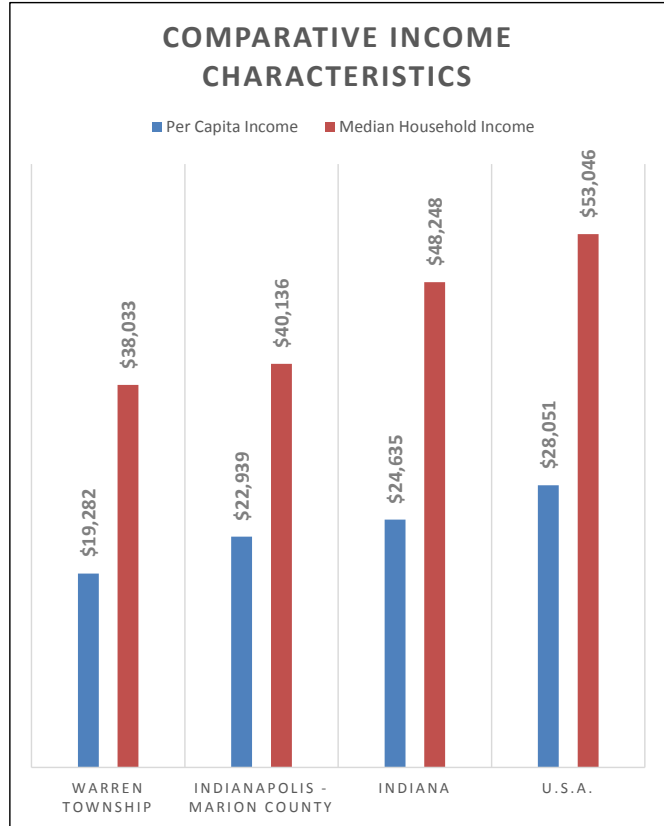


Projections through 2029 expect those of Hispanic/Latino ethnicity to double from the 2010 Census data to represent nearly 17% of the Township's population.



Income Comparative

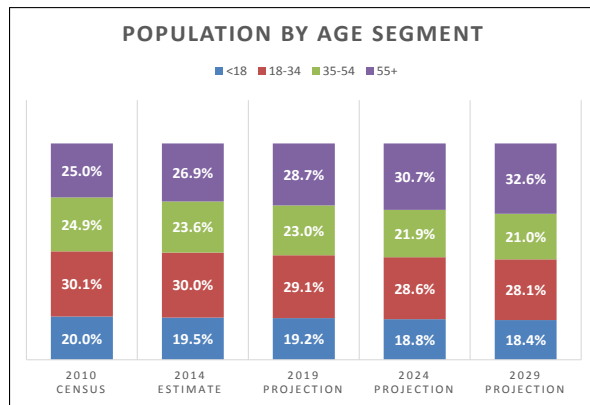
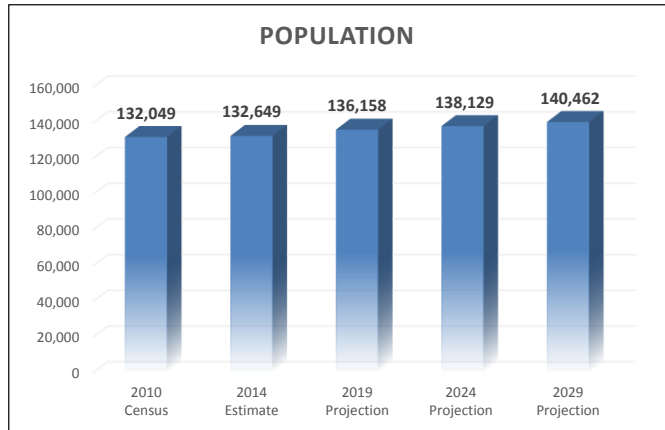
In 2014, Warren Township’s median household income was \$38,033 and per capita income was \$19,282. Median household income and per capita income for the Township fall below the county, state, and national income levels.



Washington Township

Population

The population of Washington Township is estimated to be 132,649 in 2014, which represents 14.5% of the estimated population for all of Marion County. The population of Washington Township increased slightly from the 2010 Census data at an annual growth rate of 0.13%. Based on projections through 2029, the Township's population is expected to increase to 140,462 residents living within an expected 63,191 households.

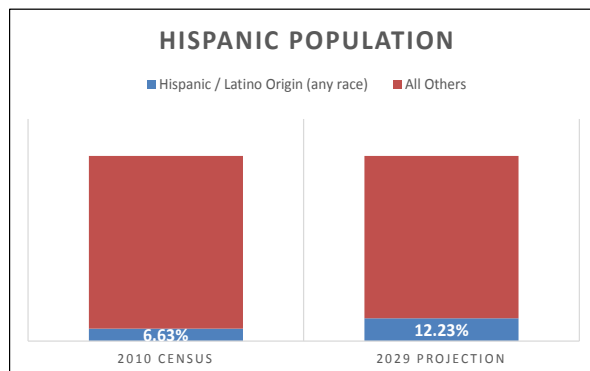
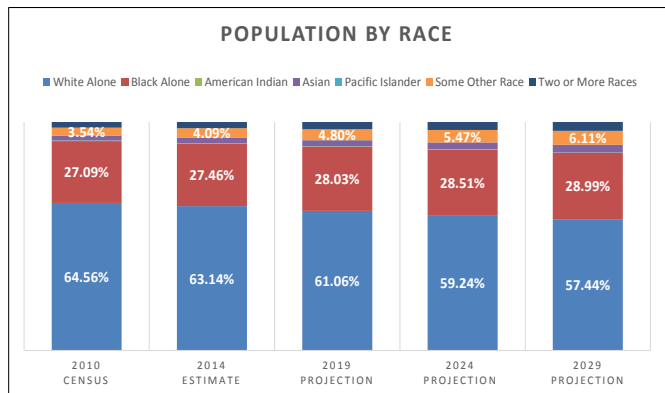


Age Segments

Based on 2014 estimates, Washington Township is slightly skewed towards the young adult age segment, with 18-34 year olds representing exactly 30% of the population. Projections over the next 15 years expect that the population will undergo an aging trend, as the 55+ group will be the only segment experiencing growth. This will result in a steady decrease among the other three age segments through 2029.

Race and Ethnicity

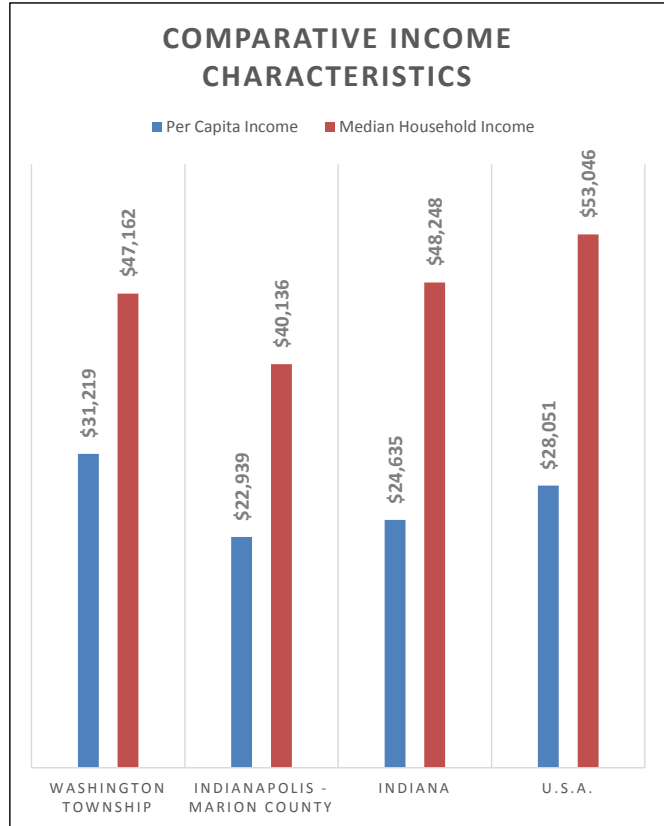
The target area is moderately diverse, as the Township is predominately White Alone (63.14%) in 2014, with Black Alone (27.46%) representing the largest minority. By 2029, the population is forecasted to become even more diverse, with the White Alone dropping to 57.44% and all other race categories are expected to experience small increases.



Projections through 2029 expect those of Hispanic/Latino ethnicity will nearly double from the 2010 Census data to represent just over 12% of the Township's population.

Income Comparative

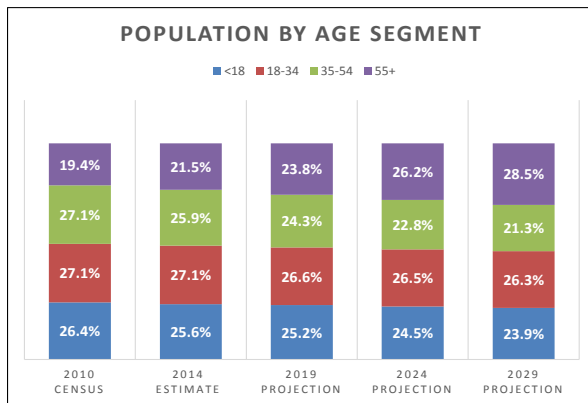
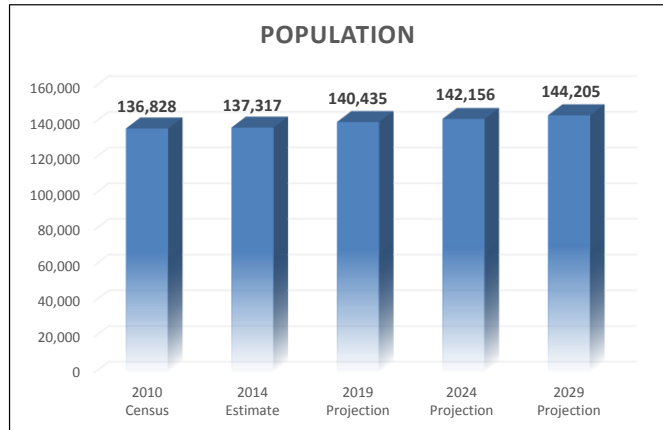
In 2014, Washington Township’s median household income was \$47,162 and per capita income was \$31,219. Comparatively, median household income is higher than the Marion County average, but falls below the state and national levels, while per capita income is well above county, state, and national levels.



Wayne Township

Population

The population of Wayne Township is estimated to be 137,317 in 2014, which comprises 15% of the estimated population for all of Marion County. The population of Wayne Township had a minimal increase from the 2010 Census data at an annual growth rate of 0.1%. Based on projections through 2029, the Township's population is expected to reach 144,205 residents living within 55,295 households.

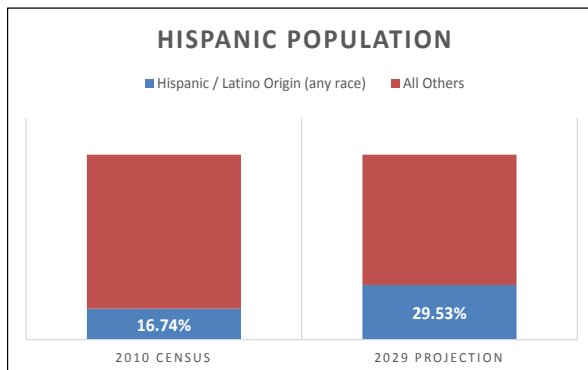
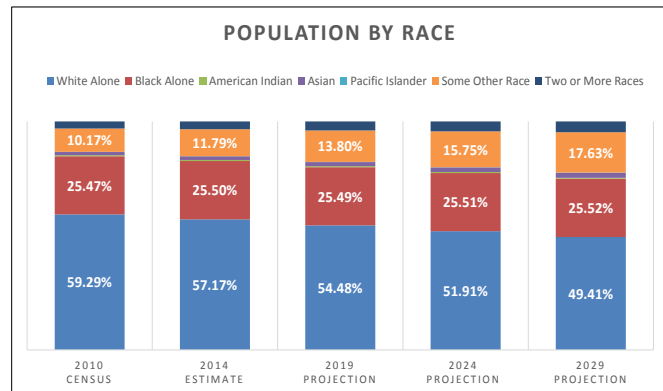


Age Segments

Based on 2014 estimates, Wayne Township is relatively evenly distributed among the four age segments; with the 55+ segment trailing the other three segments. Projections over the next 15 years expect that the population will undergo an aging trend, as the 55+ category increases to nearly 29% of the Township's total population. This will result in small decreases within all of the other age groups by 2029.

Race and Ethnicity

The target area is fairly diverse, with the majority of the population identifying as White Alone (57.17%) in 2014, and Black Alone (25.50%) representing the largest minority. By 2029, the population is predicted to become even more diverse, with the White Alone dropping to 49.41%, while the Some Other Race category grows to roughly 18% of the total population.

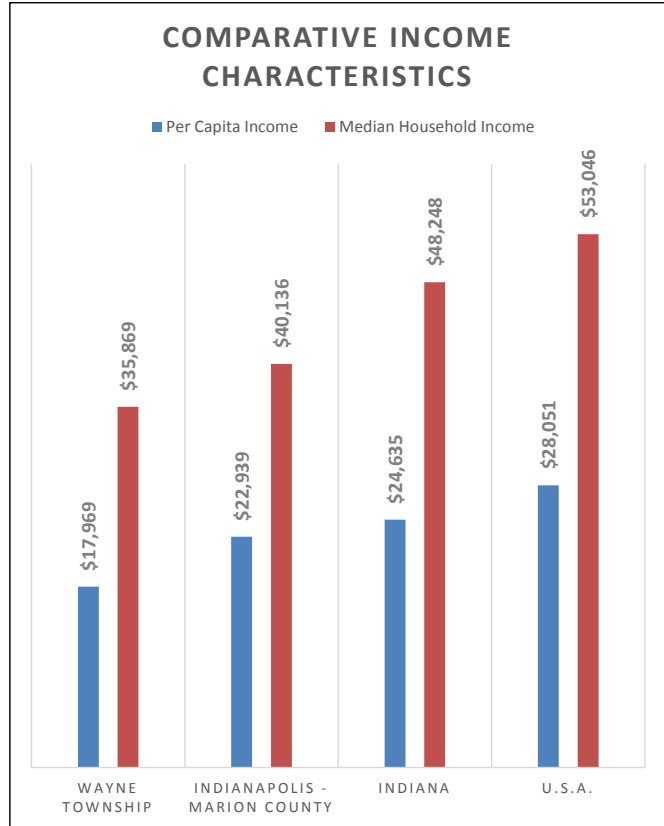


Projections through 2029 expect those of Hispanic/Latino ethnicity to grow drastically, almost doubling to 30% of the Township's population.



Income Comparative

In 2014, Wayne Township’s median household income was \$35,869 and per capita income was \$17,969. Comparatively, median household income and per capita income are well below county, state, and national averages.





Trends Analysis

The following tables summarize the findings from the Sports & Fitness Industry Association’s (SFIA) 2014 Sports, Fitness and Leisure Activities Topline Participation Report. The local market potential index data compares the demand for recreation activities and spending of Indianapolis-Marion County residents 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	<ul style="list-style-type: none"> a. “Inactives” down 0.4% in 2013, from 80.4 million to 80.2 million b. Approximately one-third of Americans (ages 6+) are active to a healthy level
2. Most popular sport and recreation activities	<ul style="list-style-type: none"> a. Fitness Walking (117 million) b. Running/Jogging (54 million) c. Treadmill (48 million)
3. Most participated in team sports	<ul style="list-style-type: none"> a. Basketball (23.7 million) b. Tennis (17.7 million) c. Baseball (13.3 million)
4. Activities most rapidly growing over last five years	<ul style="list-style-type: none"> a. Adventure Racing – up 159% b. Non-traditional/Off-road Triathlon – up 156% c. Traditional/Road Triathlon – up 140% d. Squash – up 115% e. Rugby – up 81%
5. Activities most rapidly declining over last five years	<ul style="list-style-type: none"> a. Wrestling – down 45% b. In-line Roller Skating – down 40% c. Touch Football – down 32% d. Horseback Riding – down 29% e. Slow-pitch Softball – down 29%

Summary of Local Market Potential Index Analysis	
1. Indianapolis-Marion County exhibits below average market potential for sport and leisure activities	
2. Top recreation activities in Indianapolis-Marion County compared to the national average	<ul style="list-style-type: none"> a. Football b. Basketball c. Visited a zoo d. Attended college basketball game



The Sports & Fitness Industry Association (SFIA) Sports, Fitness & Recreational Activities Topline Participation Report 2014 was utilized to evaluate national sport and fitness participatory trends. SFIA is the number one source for sport and fitness research. The study is based on online interviews carried out in January and February of 2014 from more than 19,000 individuals and households.

Information released by SFIA's 2014 Study of Sports, Fitness, and Leisure Participation reveals that the most popular sport and recreation activities include: fitness walking, treadmill, running/jogging, free weights and 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 advantages. 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. Walking participation according to data available in 2013, reported over 117 million Americans had walked for fitness at least once.

From a traditional team sport standpoint, basketball ranks highest among all sports, with nearly 24 million people reportedly participating in 2013. Team sports that have experienced significant growth in participation are rugby, lacrosse, field hockey, ice hockey, gymnastics, beach volleyball, and ultimate Frisbee— all of which have experienced double digit growth over the last five years. Most recently, rugby, field hockey, and lacrosse underwent the most rapid growth among team sports from 2012 to 2013.

In the past year, there has been a slight 0.4% decrease of “inactives” in America, from 80.4 million in 2012 to 80.2 million in 2013. According to the Physical Activity Council, an “inactive” is defined as an individual that doesn't take part in any “active” sport. Even more encouraging is that an estimated 33.9% of Americans above the age of 6 are active to a healthy level, taking part in a high calorie burning activity three or more times per week.

NOTE: In 2012, the Sports & Fitness Industry Association (SFIA) came into existence after a two-year strategic review and planning process with a refined mission statement-- “To Promote Sports and Fitness Participation and Industry Vitality”. The SFIA was formerly known as the Sporting Goods Manufacturers Association (SGMA).

National Trends in General Sports

Basketball, a game originating in the U.S., is the most participated in sport among the traditional “bat and ball” sports with almost 24 million estimated participants. Popularity can be attributed to the ability to compete with relatively small number of participants, the limited amount of equipment needed to participate, and the limited space requirements necessary – the last of which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game.

Since 2008, squash and other niche sports like lacrosse and rugby have experienced strong growth. Squash has emerged as the overall fastest growing sport, as participation levels have increased by nearly 115% over the last five years. Based on survey findings from 2008-2013, rugby and lacrosse have also experienced significant growth, increasing by 80.9% and 66% respectively. Other sports with notable growth in participation over the last five years were field hockey (31.4%), ice hockey (27.9%), gymnastics (25.1%), and beach volleyball (18.5%). From 2012 to 2013, the fastest growing sports were rugby (33.4%), field hockey (19.2%), lacrosse (12.8%), and squash (9.6%). During the last five years, the sports that are most rapidly declining include wrestling (45.2% decrease), touch football (down 32%), and slow pitch softball (28.9% decrease).

In terms of total participants, the most popular activities in the general sports category in 2013 include basketball (23.7 million), tennis (17.7 million), baseball (13.3 million), outdoor soccer (12.7 million), and slow pitch softball (6.9 million). Although three out of five of these sports have been declining in recent years, the sheer number of participants demands the continued support of these activities.

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2008	2012	2013	12-13	08-13
Baseball	15,539	12,976	13,284	2.4%	-14.5%
Basketball	26,108	23,708	23,669	-0.2%	-9.3%
Cheerleading	3,192	3,244	3,235	-0.3%	1.3%
Field Hockey	1,122	1,237	1,474	19.2%	31.4%
Football, Flag	7,310	5,865	5,610	-4.3%	-23.3%
Football, Tackle	7,816	6,220	6,165	-0.9%	-21.1%
Football, Touch	10,493	7,295	7,140	-2.1%	-32.0%
Gymnastics	3,975	5,115	4,972	-2.8%	25.1%
Ice Hockey	1,871	2,363	2,393	1.3%	27.9%
Lacrosse	1,092	1,607	1,813	12.8%	66.0%
Racquetball	4,611	4,070	3,824	-6.0%	-17.1%
Roller Hockey	1,569	1,367	1,298	-5.0%	-17.3%
Rugby	654	887	1,183	33.4%	80.9%
Soccer (Indoor)	4,487	4,617	4,803	4.0%	7.0%
Soccer (Outdoor)	13,996	12,944	12,726	-1.7%	-9.1%
Softball (Fast Pitch)	2,331	2,624	2,498	-4.8%	7.2%
Softball (Slow Pitch)	9,660	7,411	6,868	-7.3%	-28.9%
Squash	659	1,290	1,414	9.6%	114.6%
Tennis	17,749	17,020	17,678	3.9%	-0.4%
Track and Field	4,604	4,257	4,071	-4.4%	-11.6%
Ultimate Frisbee	4,459	5,131	5,077	-1.1%	13.9%
Volleyball (Court)	7,588	6,384	6,433	0.8%	-15.2%
Volleyball (Sand/Beach)	4,025	4,505	4,769	5.9%	18.5%
Wrestling	3,335	1,922	1,829	-4.8%	-45.2%

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%)
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National Trends in Aquatic Activity

Swimming is unquestionably a lifetime sport. Swimming activities have remained very popular among Americans, and both competition and fitness swimming have experienced an increase in participation. Fitness swimming is the absolute leader in multigenerational appeal with over 26 million reported participants in 2013, a 13.5% increase from the previous year. NOTE: In 2011, recreation swimming was separated into competition and fitness categories in order to better identify key trends.

Aquatic Exercise has a strong participation base, but has recently experienced a downward trend. Aquatic exercise has paved the way for a less stressful form of physical activity, allowing similar gains and benefits to land based exercise, including aerobic fitness, resistance training, flexibility, and better balance. Doctors have begun 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 affect that the pressure of the water assists in reducing swelling of injuries.

National Participatory Trends - Aquatics									
Activity	Participation Levels			% Change					
	2008	2012	2013	12-13	08-13				
Aquatic Exercise	9,512	9,177	8,483	-7.6%	-10.8%				
Swimming (Competition)	N/A	2,502	2,638	5.4%	N/A				
Swimming (Fitness)	N/A	23,216	26,354	13.5%	N/A				
NOTE: Participation figures are in 000's for the US population ages 6 and over									
Legend: <table border="1" style="display: inline-table; vertical-align: middle;"> <tr> <td style="background-color: #008000; color: white; padding: 2px;">Large Increase (greater than 25%)</td> <td style="background-color: #90EE90; padding: 2px;">Moderate Increase (0% to 25%)</td> <td style="background-color: #FFFF00; padding: 2px;">Moderate Decrease (0% to -25%)</td> <td style="background-color: #FF0000; color: white; padding: 2px;">Large Decrease (less than -25%)</td> </tr> </table>						Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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

National participatory trends in general fitness have experienced some 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 activities 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 over 117 million participants in 2013. This change represents 2.9% increase from the previous year. Other leading fitness activities based on number of participants include running/jogging (over 54 million), treadmill (48.1 million), and hand free weights (43.2 million), and weight/resistant machines (36.3 million).

Over the last five years, the activities that are growing most rapidly are high impact aerobics (up 47.1%), yoga (up 36.9%), running/jogging (up 31.9%), cardio kickboxing (28.7% increase), and group stationary cycling (up 27.8%). Most recently, from 2012-2013, the largest gains in participation were in boxing for fitness (8.7% increase), Tai Chi (up 8.3%), and high impact aerobics (up 7.1%).

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2008	2012	2013	12-13	08-13
Aerobics (High Impact)	11,780	16,178	17,323	7.1%	47.1%
Aerobics (Low Impact)	23,283	25,707	25,033	-2.6%	7.5%
Aerobics (Step)	9,423	9,577	8,961	-6.4%	-4.9%
Boxing for Fitness	N/A	4,831	5,251	8.7%	N/A
Calisthenics	8,888	9,356	9,356	0.0%	5.3%
Cross-Training	N/A	7,496	6,911	-7.8%	N/A
Cardio Kickboxing	4,905	6,725	6,311	-6.2%	28.7%
Elliptical Motion Trainer	24,435	28,560	27,119	-5.0%	11.0%
Fitness Walking	110,204	114,029	117,351	2.9%	6.5%
Free Weights (Barbells)	25,821	26,688	25,641	-3.9%	-0.7%
Free Weights (Dumbbells)	N/A	N/A	32,309	N/A	N/A
Free Weights (Hand Weights)	N/A	N/A	43,164	N/A	N/A
Martial Arts	6,818	5,075	5,314	4.7%	-22.1%
Pilates Training	9,039	8,519	8,069	-5.3%	-10.7%
Running/Jogging	41,097	51,450	54,188	5.3%	31.9%
Stair Climbing Machine	13,863	12,979	12,642	-2.6%	-8.8%
Stationary Cycling (Group)	6,504	8,477	8,309	-2.0%	27.8%
Stationary Cycling (Recumbent)	11,104	11,649	11,159	-4.2%	0.5%
Stationary Cycling (Upright)	24,918	24,338	24,088	-1.0%	-3.3%
Stretching	36,235	35,873	36,202	0.9%	-0.1%
Tai Chi	3,424	3,203	3,469	8.3%	1.3%
Treadmill	49,722	50,839	48,166	-5.3%	-3.1%
Weight/Resistant Machines	38,844	38,999	36,267	-7.0%	-6.6%
Yoga	17,758	23,253	24,310	4.5%	36.9%

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

Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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National Trends in General Recreation

Results from the SFIA’s *Topline Participation Report* demonstrate increased popularity among Americans in numerous general 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 2013, the most popular activities in the general recreation category include road bicycling (over 40 million participants), freshwater fishing (nearly 38 million participants), and day hiking (over 34 million participants).

From 2008-2013, general recreation activities that have undergone very rapid growth are adventure racing (up 159%), non-traditional/off-road triathlons (up 156%), traditional/road triathlons (up 139.9%), and trail running (up 49.7%). In-line roller skating, horseback riding, and skateboarding have all seen a substantial drop in participation, decreasing by 40%, 29.4%, and 21.8% respectively over the last five years.

National Participatory Trends - General Recreation					
Activity	Participation Levels			% Change	
	2008	2012	2013	12-13	08-13
Adventure Racing	809	1,618	2,095	29.5%	159.0%
Archery	6,180	7,173	7,647	6.6%	23.7%
Bicycling (Mountain)	7,242	7,265	8,542	17.6%	18.0%
Bicycling (Road)	38,527	39,790	40,888	2.8%	6.1%
Bicycling (BMX)	1,896	1,861	2,168	16.5%	14.3%
Camping (Recreational Vehicle)	16,343	15,903	14,556	-8.5%	-10.9%
Camping (Within 1/4 Mile of Vehicle/Home)	32,531	31,454	29,269	-6.9%	-10.0%
Climbing (Sport/Indoor/Boulder)	4,642	4,355	4,745	9.0%	2.2%
Climbing (Traditional/Ice/Mountaineering)	2,175	2,189	2,319	5.9%	6.6%
Fishing (Fly)	5,849	5,848	5,878	0.5%	0.5%
Fishing (Freshwater)	42,095	39,002	37,796	-3.1%	-10.2%
Fishing (Saltwater)	14,121	12,000	11,790	-1.8%	-16.5%
Golf	28,571	25,280	24,720	-2.2%	-13.5%
Hiking (Day)	31,238	34,519	34,378	-0.4%	10.1%
Horseback Riding	11,457	8,423	8,089	-4.0%	-29.4%
Hunting (Bow)	3,770	4,354	4,079	-6.3%	8.2%
Hunting (Handgun)	2,734	3,112	3,198	2.8%	17.0%
Hunting (Rifle)	10,490	10,485	9,792	-6.6%	-6.7%
Hunting (Shotgun)	8,638	8,426	7,894	-6.3%	-8.6%
Roller Skating, In-Line	10,211	6,647	6,129	-7.8%	-40.0%
Shooting (Sport Clays)	4,199	4,544	4,479	-1.4%	6.7%
Shooting (Trap/Skeet)	3,523	3,591	3,784	5.4%	7.4%
Skateboarding	8,118	6,227	6,350	2.0%	-21.8%
Target Shooting (Handgun)	12,551	15,418	14,370	-6.8%	14.5%
Target Shooting (Rifle)	12,769	13,853	13,023	-6.0%	2.0%
Trail Running	4,537	5,806	6,792	17.0%	49.7%
Triathlon (Non-Traditional/Off Road)	543	1,075	1,390	29.3%	156.0%
Triathlon (Traditional/Road)	943	1,789	2,262	26.4%	139.9%

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

Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)
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Local Sport and Market Potential

The following charts show sport and leisure market potential data from ESRI. A Market Potential Index (MPI) measures the probable demand for a product or service in the target area. The MPI shows the likelihood that an adult resident of the city-county 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 city is compared to the national average in four (4) categories – general sports by activity, fitness by activity, outdoor activity, and commercial recreation.

The general sports category produced the most positive market potential index figures for Indianapolis-Marion County. Every activity in this category was on par with, or above, the national averages. This is promising in that it shows that residents are actively participating in sporting activities that should be core recreational offerings through departmental programming and amenities.

Outside of general sports, market potential indexes were below average for the majority of activities analyzed, and the reversal of the current trends should be a priority of the Department. This deviation from the national average might indicate a lack of awareness among potential users, programs that don't align with community needs and interests, a lack of available amenities and/or a need to motivate residents to participate in offerings at a higher level.

The fact that activities in the fitness category are lagging behind presents a prime opportunity for Indy Parks. National trends for fitness have been on the rise in recent years and parks and recreation agencies across the country have capitalized on these trends by offering a variety of fitness programming and developing amenities, such as multi-use trails, that allow users to engage in healthy, active lifestyles. Because earning capabilities among residents are also below average, fitness programming and amenities are a great way to boost participation levels, due to the fact that these activities generally have low barriers to entry and can be provided minimal cost. Research and trends suggest that fitness programming is a critical component to a healthy community, and parks and recreation departments tend to be a driving force behind active, healthy lifestyles for residents.

As observed in the tables below, the following sport and leisure trends are most prevalent for residents within the Indianapolis-Marion County, and compares participation for each activity to the national average.

General Sports Market Potential

Local Participatory Trends - General Sports				
Activity	Estimated Participants	% of Population		MPI
		Indpls-Marion	USA	
Basketball	65,805	9.5%	8.3%	114
Golf	64,262	9.3%	9.5%	98
Football	39,818	5.7%	5.0%	115
Baseball	30,947	4.5%	4.5%	99
Tennis	30,428	4.4%	4.3%	103
Volleyball	26,020	3.7%	3.5%	106
Soccer	25,818	3.7%	3.7%	99
Softball	25,444	3.7%	3.5%	107



Fitness Market Potential

Local Participatory Trends - Fitness				
Activity	Estimated Participants	% of Population		MPI
		Indpls-Marion	USA	
Walking for exercise	177,785	25.6%	28.1%	91
Swimming	102,056	14.7%	15.8%	93
Jogging/running	83,302	12.0%	12.8%	94
Weight lifting	70,533	10.2%	10.6%	96
Aerobics	59,278	8.5%	8.9%	96
Yoga	49,597	7.1%	7.1%	100
Pilates	18,574	2.7%	2.8%	96

Outdoor Activity Market Potential

Local Participatory Trends - Outdoor Activity				
Activity	Estimated Participants	% of Population		MPI
		Indpls-Marion	USA	
Fishing (fresh water)	85,182	12.3%	12.4%	99
Went overnight camping	81,688	11.8%	12.8%	92
Hiking	70,653	10.2%	10.0%	102
Bicycling (road)	65,293	9.4%	9.8%	96
Canoeing/kayaking	35,472	5.1%	5.4%	95
Boating (power)	32,451	4.7%	5.3%	88
Birdwatching	29,296	4.2%	4.7%	89
Bicycling (mountain)	28,262	4.1%	4.1%	101
Backpacking	21,219	3.1%	3.0%	104
Horseback riding	15,906	2.3%	2.4%	94

Commercial Recreation Market Potential

Local Participatory Trends - Commercial Recreation				
Activity	Estimated Participants	% of Population		MPI
		Indpls-Marion	USA	
Attended sports event	154,769	22.3%	23.5%	95
Visited a theme park	116,529	16.8%	18.1%	93
Visited a zoo	87,616	12.6%	11.7%	108
Visited a Museum	79,444	11.4%	12.8%	89
Attended baseball game - MLB reg seas	60,453	8.7%	9.6%	91
Spent \$250+ on sports/rec equip	44,688	6.4%	7.0%	92
Spent \$100-249 on sports/rec equip	43,313	6.2%	6.5%	96
Attended football game (college)	40,350	5.8%	5.6%	103
Spent \$1-99 on sports/rec equip	39,544	5.7%	6.0%	95
Attended high school sports	33,702	4.9%	4.7%	105
Attended football game - NFL weekend	30,031	4.3%	4.6%	93
Visited indoor water park	22,530	3.2%	3.1%	104
Attended basketball game - NBA reg seas	22,282	3.2%	3.1%	102
Attended basketball game (college)	22,077	3.2%	3.0%	108
Attended ice hockey - NHL reg seas	17,573	2.5%	2.7%	91
Attended football game - NFL Mon/Thurs	16,489	2.4%	2.6%	92

Demographic and Trends Findings

- The population of Indianapolis-Marion County is growing, but much slower than the national annual growth rate. Center Township contains the most residents, representing 15.8% of the City's population, while Decatur Township has the smallest population, with only 3.6% of the total population. Franklin Township underwent the most rapid growth from 2010-2014 at an annual rate of 1.2%.
- With a median age of 34.6 years old in 2014, Indianapolis-Marion County is younger than the national average of 37.2 years. The service area is expected to undergo an aging trend, as the 55+ segment is projected to increase to 30.2% of the population by 2029. Decatur is currently the youngest (32.5 years) township in the county, while Warren Township reports the oldest (35.8 years) median age. Pike is expected to age faster than all other townships, as the 55+ segment is projected to increase its representation by 7.7% by 2029.
- The service area is predominately White Alone (61%), with Black Alone (27%) and Some Other Race (6%) representing the largest minorities. The racial composition of Indianapolis-Marion County is projected to gradually become more diverse. Those of Hispanic/Latino Origin represent 9% of the population, and are expected to rapidly increase to over 17% of the total by 2029. Analyzing race by township, Franklin is the least diverse, while Pike is the most diverse. Wayne Township has the highest concentration of Hispanic/Latinos at 17%, and is expected to reach nearly 30% of the township's population by 2029.
- Median household income (\$40,136) and per capita income (\$22,939) for Indianapolis-Marion County residents fall well below state and national averages. Center Township reports the lowest median household income (\$26,316) and per capita income (\$15,111) among the nine townships of Marion County. Townships with the highest income characteristics were Franklin for median household income (\$63,723) and Washington on a per capita basis (\$31,219).
- Local market potential for recreation and leisure activities was relatively low among Indianapolis-Marion County residents overall. When compared to the national averages, the service area did report average, to above average, MPI figures in the general sports category, while general fitness, outdoor activity, and commercial recreation reported below average participation levels for local residents.