

SECTION 3: Demographic and Leisure Trends

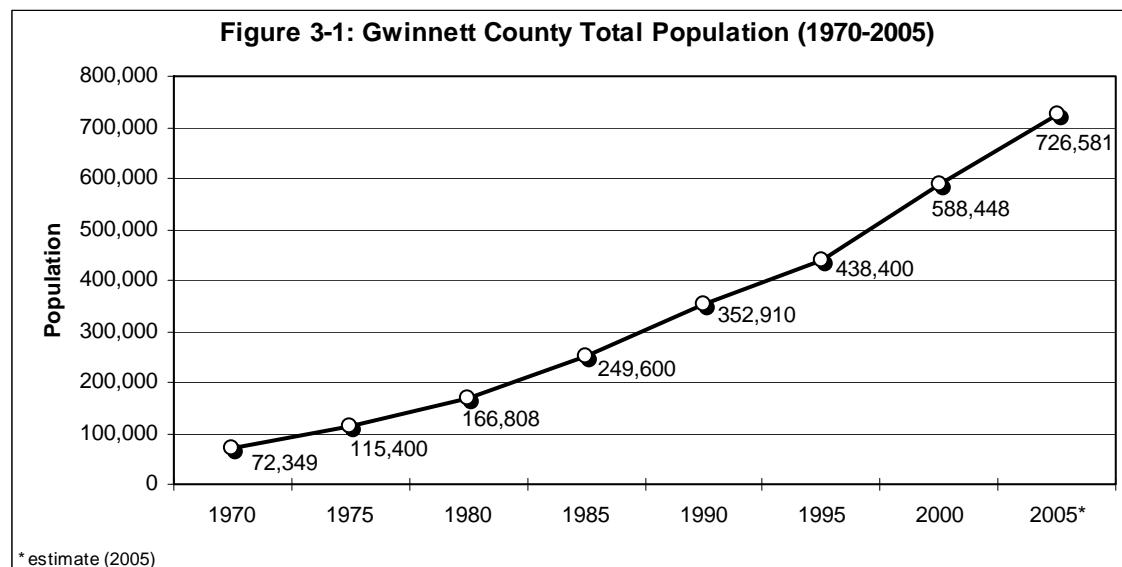
The Capital Improvement Plan (CIP) is a forward-looking strategic document that will guide the provision of parks and recreation facilities and services within Gwinnett County to the year 2013 and beyond; the CIP functions as an update to the 2004 Comprehensive Park and Recreation Master Plan. In order to understand the current and future needs of the County's citizenry, we must first examine the composition of the existing population and delve more deeply into the trends affecting recreational participation. Most notably, this section of the Plan examines population projections and the implications of leisure trends on the future of recreation services in Gwinnett County.

3.1 DEMOGRAPHIC ANALYSIS

Several sources are drawn upon for the demographic analysis in this section, including the 2000 U.S. Census and the 2005 American Community Survey (both published by the U.S. Census Bureau). Most notably, the population estimates and forecasts have been provided through the background research undertaken by Dr. Thomas Hammer for Gwinnett County's 2030 Unified Plan, a plan which coordinates the updates of the Comprehensive Plan, the Consolidated Plan, and the Comprehensive Transportation Plan.

3.1.1 Population - Past

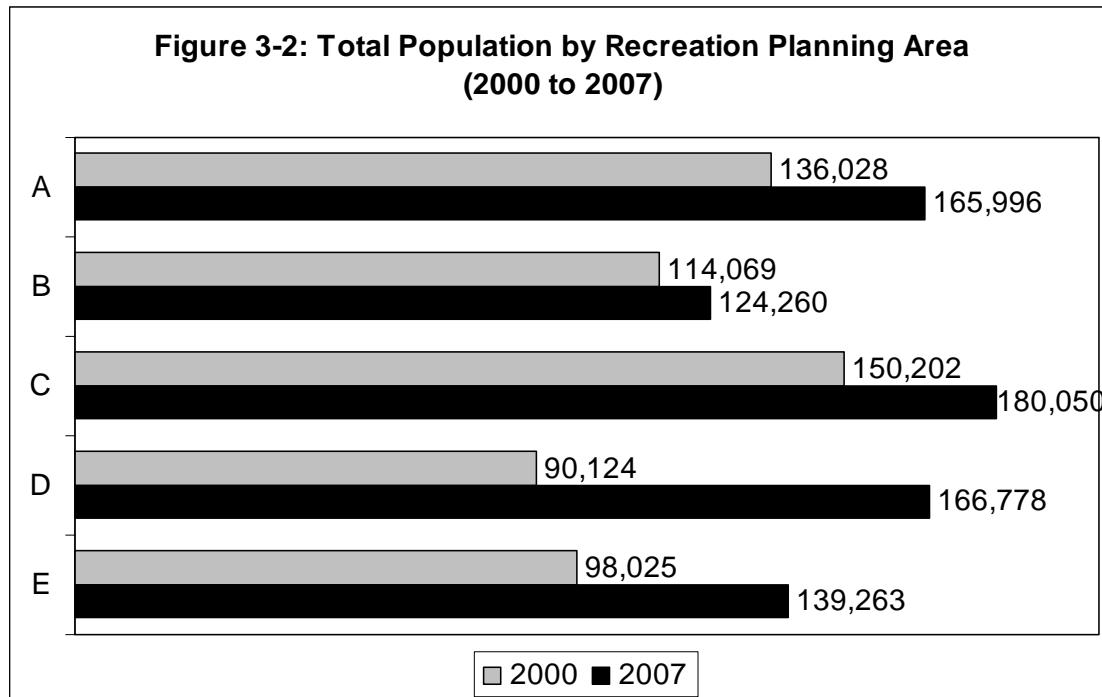
Gwinnett County's population has been experiencing tremendous growth since the 1970s, having grown by over 900% since 1970 (see Figure 3-1). Although Gwinnett County's growth rate has declined in relative terms in recent years, it remains one of the fastest growing counties in the United States and, proportionally, Gwinnett County has accounted for over one-quarter of the Atlanta Region's growth in the past three decades.



Sources: U.S. Census Bureau (historic populations); Dr. Thomas Hammer, 2007 (estimate)

The Gwinnett County Planning and Development Department estimates that there are 776,347 people living in Gwinnett County in 2007 (as of July 1). This population estimate will be used as the baseline figure in this Capital Improvement Plan Update.

Data developed for the 2030 Unified Plan suggests that the largest population gain between 2000 and 2005 occurred in Recreation Planning Area D (85% increase), followed by E (42%), A (22%), C (20%) and B (9%). Please refer to **Map 1-1** earlier in this report for an illustration of the Recreation Planning Areas. Population changes are shown in Figure 3-2.



Sources: US Census Bureau, 2000; Dr. Thomas Hammer, 2007

The County's primary population growth pattern has generally followed the I-85, I-985, and Georgia Highway 316 corridors into the northeast and eastern-most portions of the County. Continued population growth and intensification is expected to continue along these highway corridors.

Population densities by census tract are shown on **Map 3-1**.

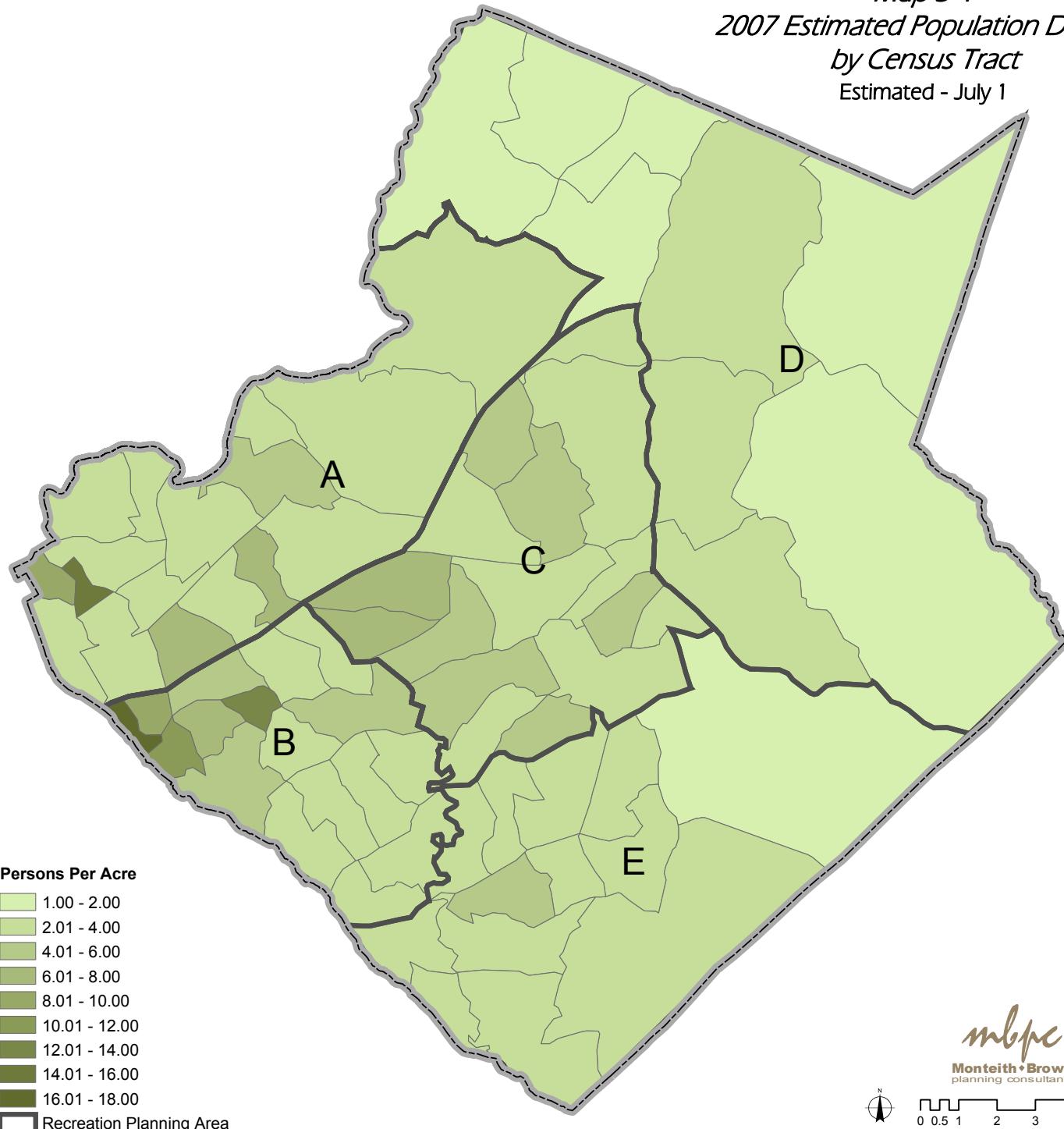


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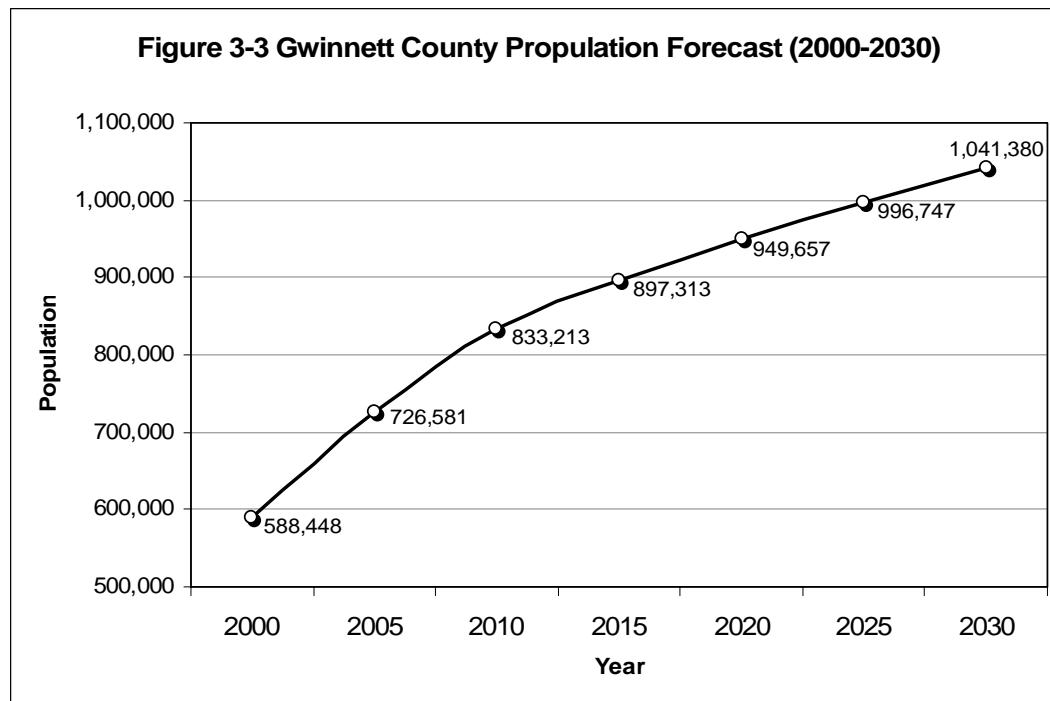
Map 3-1

*2007 Estimated Population Density
by Census Tract*
Estimated - July 1



3.1.2 Population - Future

Based on the population forecast generated for the Gwinnett County 2030 Unified Plan, it is estimated that the County's population will continue to increase, but at a slightly declining rate (see Figure 3-3). It should be noted that the population forecasts for the 2009-2013 period covered by this plan are considered to be very conservative.



Sources: U.S. Census Bureau (historic populations); Dr. Thomas Hammer, 2007 (forecasts)

For the period of 2009 to 2013 (which represents the four year term of this Capital Improvement Plan), the County's population is forecasted to grow by 58,474 people (an average of 14,616 people per year). Relatively speaking, this suggests that a slowdown in growth is anticipated for the coming years – especially in comparison to the more rapid growth experienced in the early part of this decade – which may present an opportunity for the County to bridge the gap between supply and demand, should such a gap exist. Table 3-1 illustrates Gwinnett County's declining growth rate over the years.

Table 3-1: Historical and Projected Annual Growth (Gwinnett County, 1970-2013)

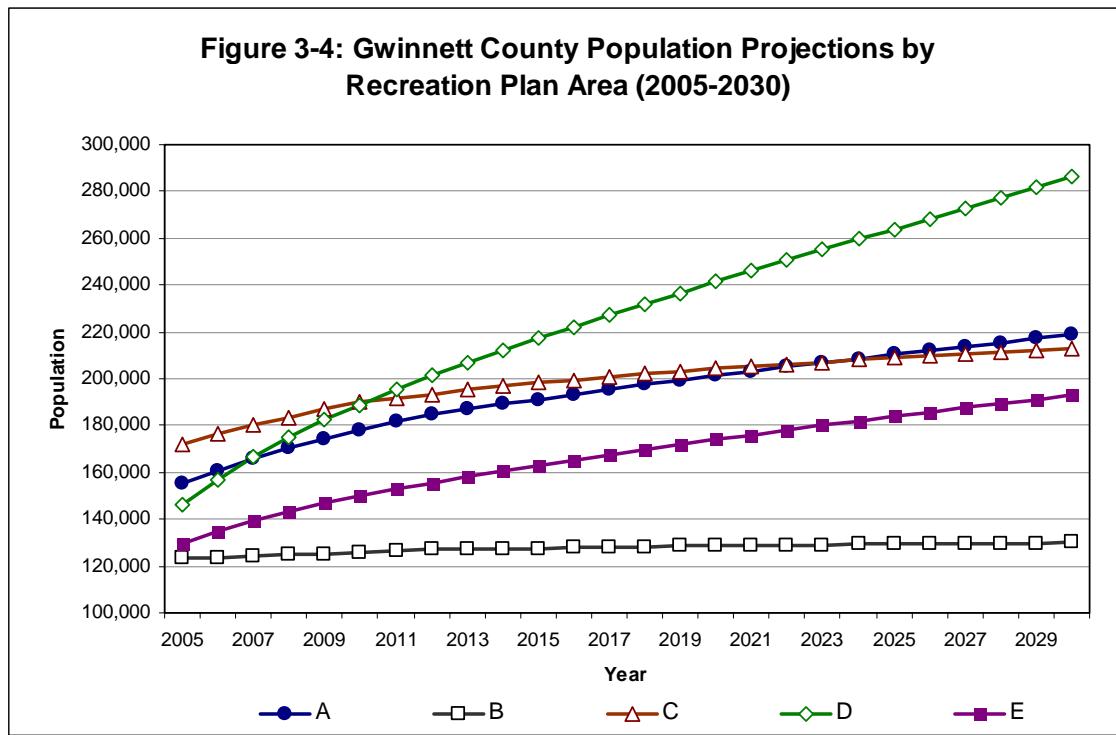
Time Period	Annual Growth	Approximate Annual Growth Rate
1970 to 1980	9,446	8.7%
1980 to 1990	18,610	7.8%
1990 to 2000	23,554	5.2%
2000 to 2010*	24,477	3.5%
2009 to 2013* (timing of this Plan)	14,616	1.7%

* estimates

Sources: U.S. Census Bureau (historic populations); Dr. Thomas Hammer, 2007 (forecasts)

Intense population growth over the past thirty years has also resulted in increased densities and declines in the availability of developable land. Another contributing factor to the declining growth rate is the aging of the population (discussed in the next subsection).

In terms of where future population growth is expected to occur, Figure 3-4 illustrates that RPA D holds the most capacity for new residents over both the short and the long-term, while RPA B is largely built-out and will not see any substantial change in its population levels. The growth potential in RPAs A, C, and E is quite similar over the next few years, with growth in RPA C slowing around the year 2011.



Source: Dr. Thomas Hammer, 2007

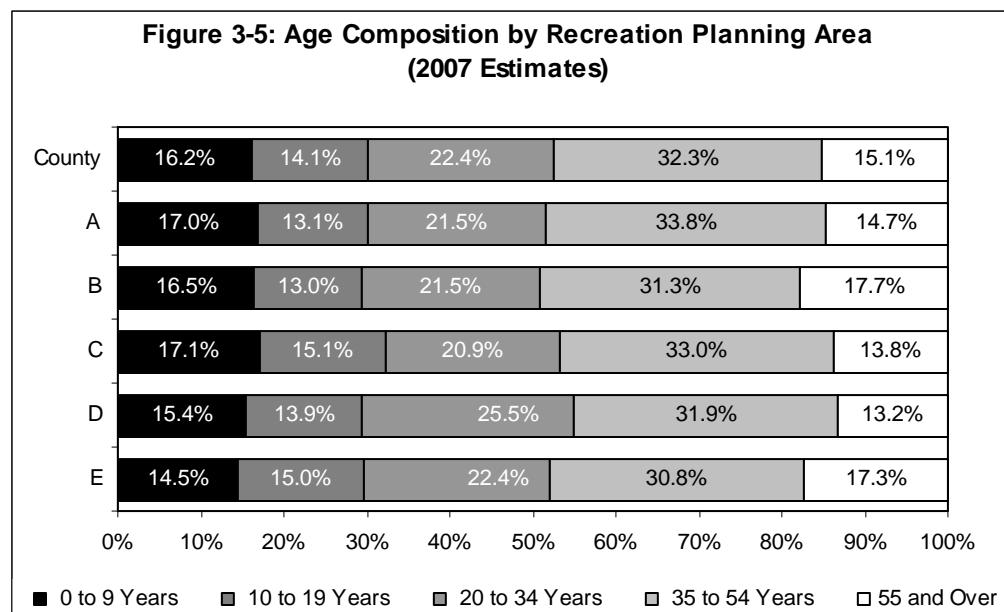
These forecasts account not only for development in greenfield areas, but also through infill and intensification in areas that are already built-up. The establishment of greater densities in built areas will only intensify the need for additional and appropriate parks and recreation facilities to serve these communities, many of which are currently deficient and have little land readily available for acquisition and/or facility development.

3.1.3 Age Composition

The vast majority of Gwinnett County's population increases over the past thirty years have been a result of in-migration rather than births. Due to the County's strong and diverse economic base and excellent infrastructure, thousands of people, including many families and young adults, have been attracted to the area. The result has been a population that has a relatively low median age and that, despite the aging of the baby boom generation and declining birth rates nationwide, has not aged as rapidly as most established communities.

As the County's growth begins to slow, however, a more noticeable aging of the population is expected. For example, Gwinnett County's median age increased from 30.5 years to 32.5 years between 1990 and 2000. In 2005, the median age was recorded at 33.3 years through the American Community Survey. With the leading edge of the baby boomer cohort just now approaching 60 years of age, this trend will continue to become more pronounced. Most important to this Capital Improvement Plan is that the emerging 55 and over age cohort – exemplified by the baby boom generation – is expected to be much more active and demanding on recreational resources than were past generations of seniors.

Current population estimates were developed by age and Recreation Planning Area. As can be seen in Figure 3-5, all five RPAs have remarkably similar age profiles. To the extent that these estimates can be relied upon, it would appear that RPA C has the greatest proportion of children and youth, while RPAs B and E have the greatest proportion of residents age 55 and over.



Source: Dr. Thomas Hammer, 2007

Maps 3-2 to 3-6 show age-specific population densities by Census tract for the year 2007.

Despite an overall aging trend, population increases are forecasted for all age categories. This suggests that there are likely to be continued demands for child and teen recreation, while greater demands for recreational opportunities for older adults and senior citizens are likely being experienced due to greater than average population growth in these age categories.

Figure 3-6 illustrates the growth forecasts by major age categories. In the coming years, it is anticipated that Gwinnett County's growth rate will decline, in-migration will begin to slow, and the median age will increase. Much like the past decade, the result will be considerable growth in the 55-plus age group and relatively slow growth in the younger age cohorts.



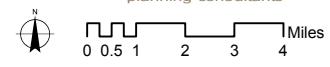
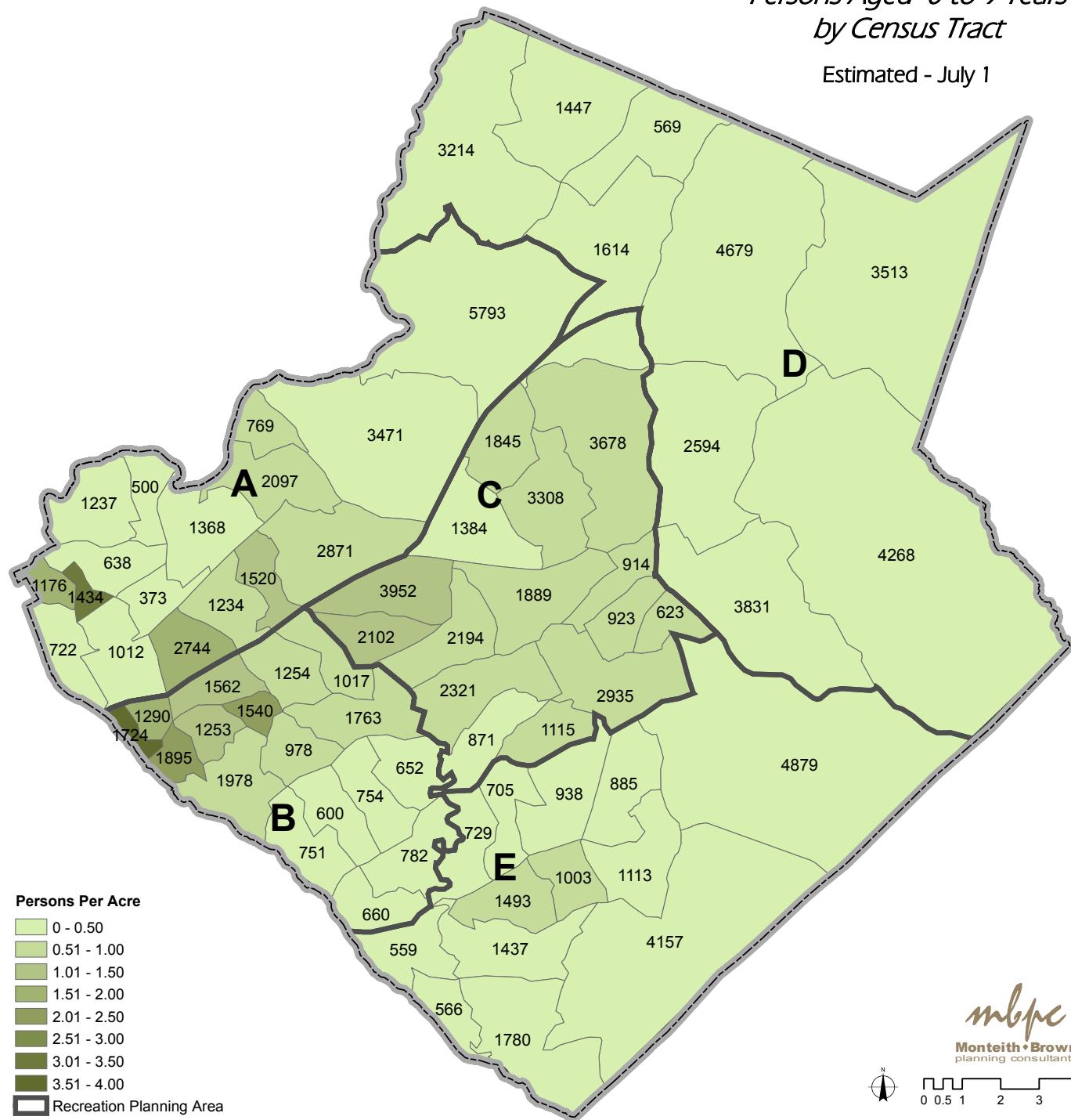
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Map 3-2

*2007 Estimate of Population Distribution
Persons Aged 0 to 9 Years
by Census Tract*

Estimated - July 1



Source: Dr. Thomas Hammer, 2007



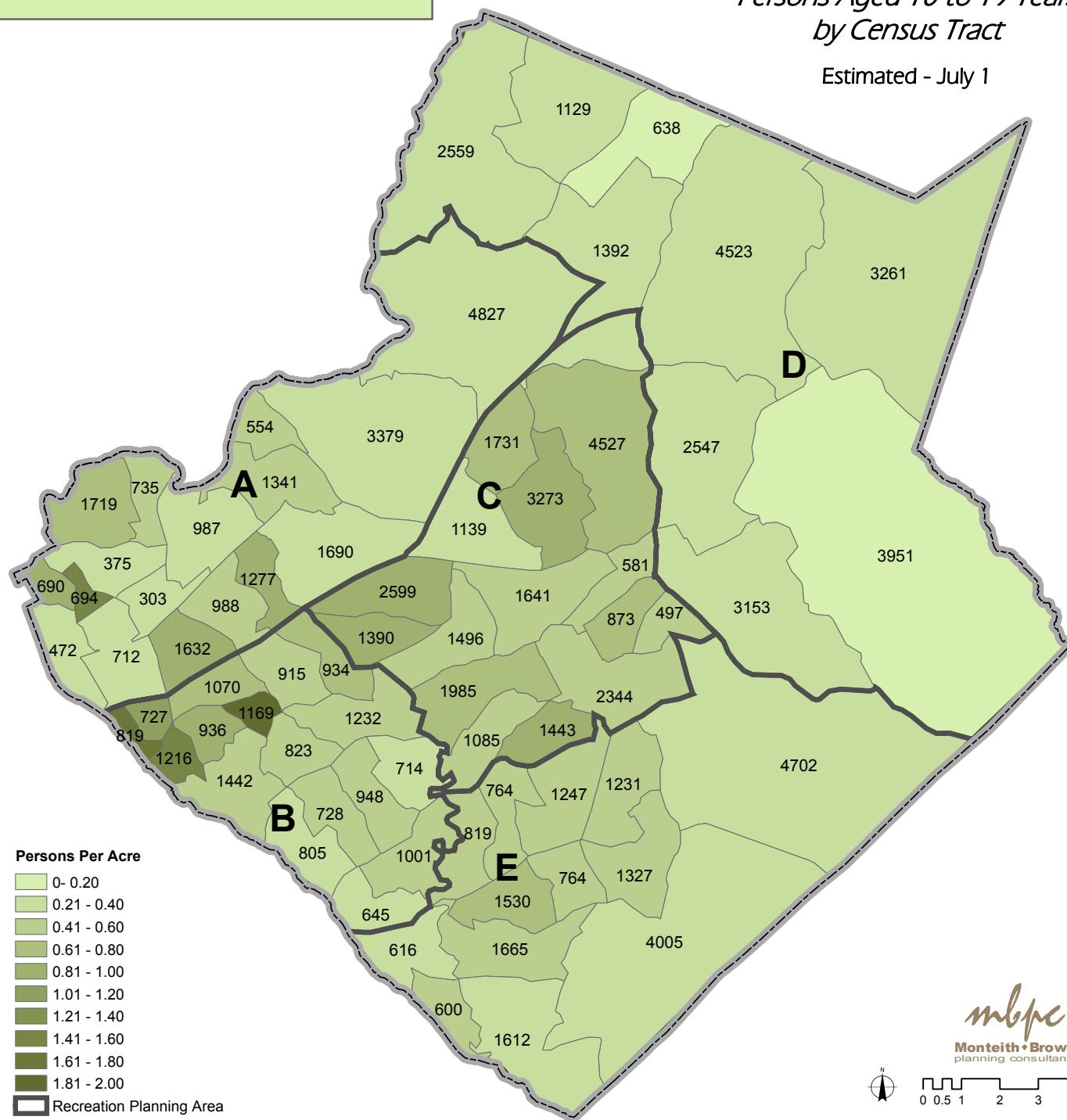
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Map 3-3

*2007 Estimate of Population Distribution
Persons Aged 10 to 19 Years
by Census Tract*

Estimated - July 1



Source: Dr. Thomas Hammer, 2007

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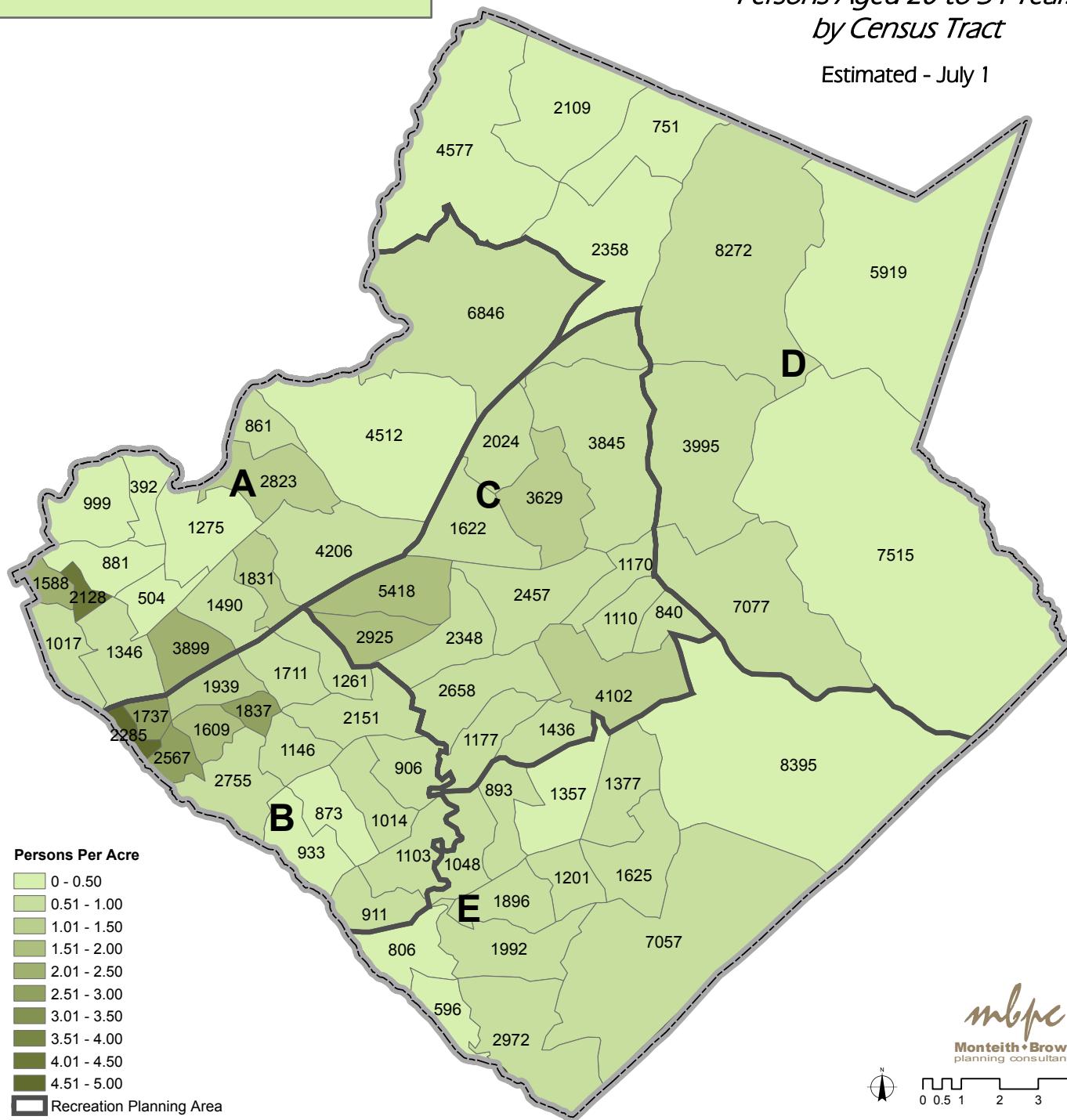
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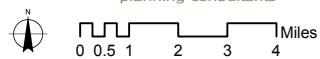
Map 3-4

2007 Estimate of Population Distribution Persons Aged 20 to 34 Years by Census Tract

Estimated - July 1



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Source: Dr. Thomas Hammer, 2007



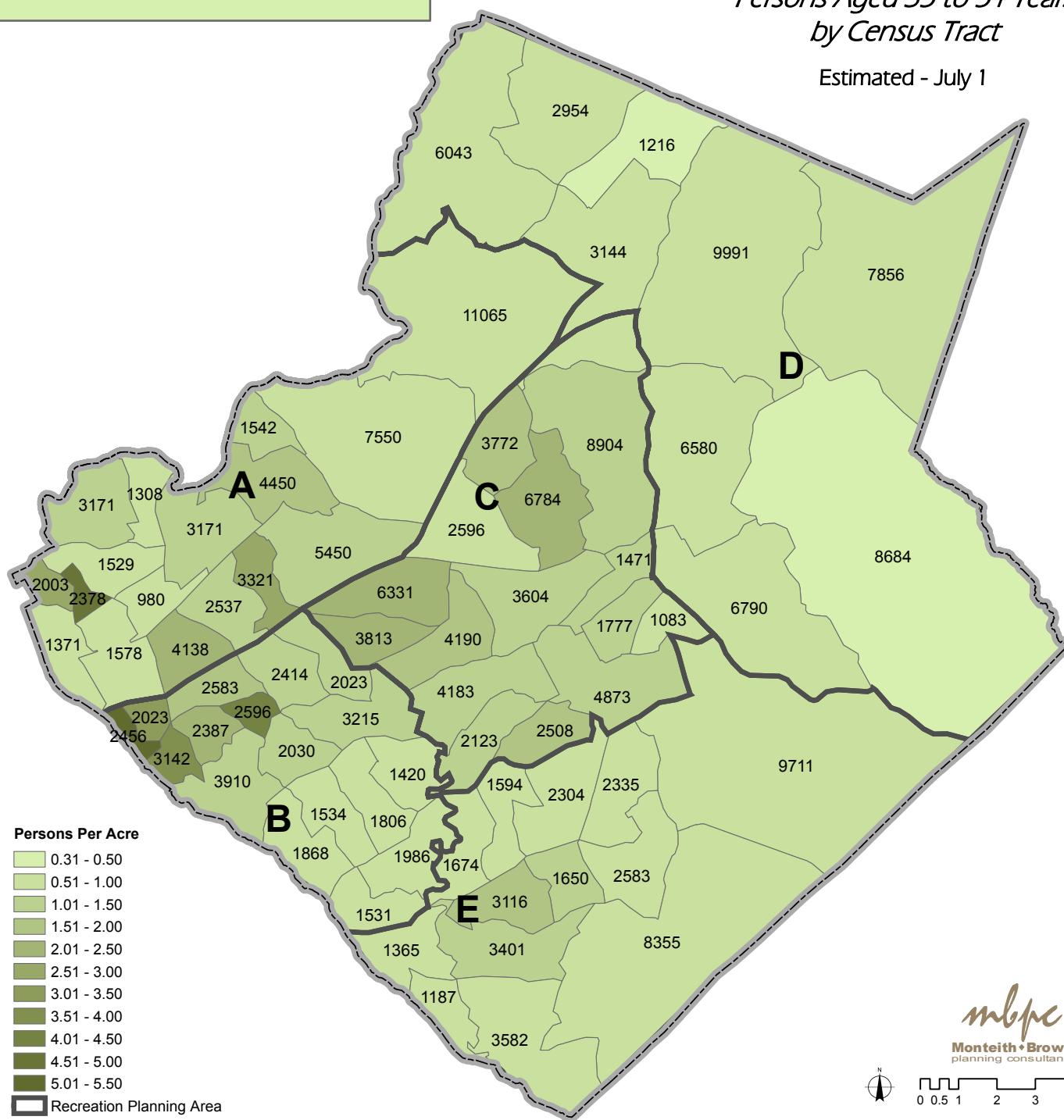
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Map 3-5

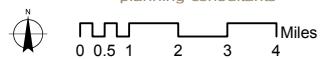
2007 Estimate of Population Distribution Persons Aged 35 to 54 Years by Census Tract

Estimated - July 1



Source: Dr. Thomas Hammer, 2007

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POPULATION DISTRIBUTION
BY RECREATION PLANNING AREA

Planning Area	Total Population	55 and Over
A Population % of Planning Area	165,996 100.0%	24,370 14.7%
B Population % of Planning Area	124,260 100.0%	22,022 17.7%
C Population % of Planning Area	180,050 100.0%	24,762 13.8%
D Population % of Planning Area	166,778 100.0%	22,063 13.2%
E Population % of Planning Area	139,263 100.0%	24,068 17.3%
Total Population % of Total County Population	776,347 100.00%	117,285 15.11%



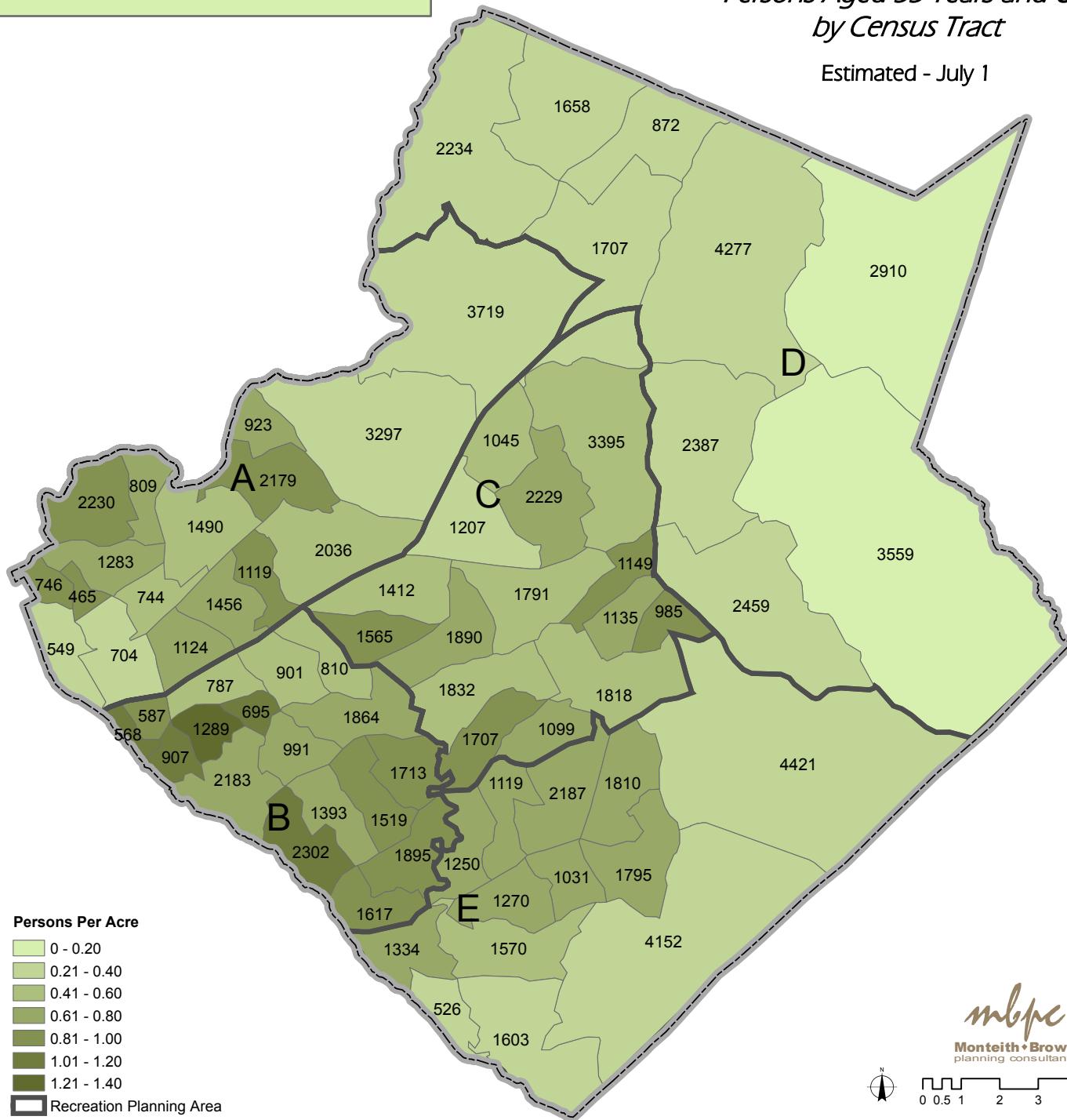
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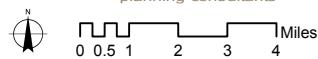
Map 3-6

*2007 Estimate of Population Distribution
Persons Aged 55 Years and Up
by Census Tract*

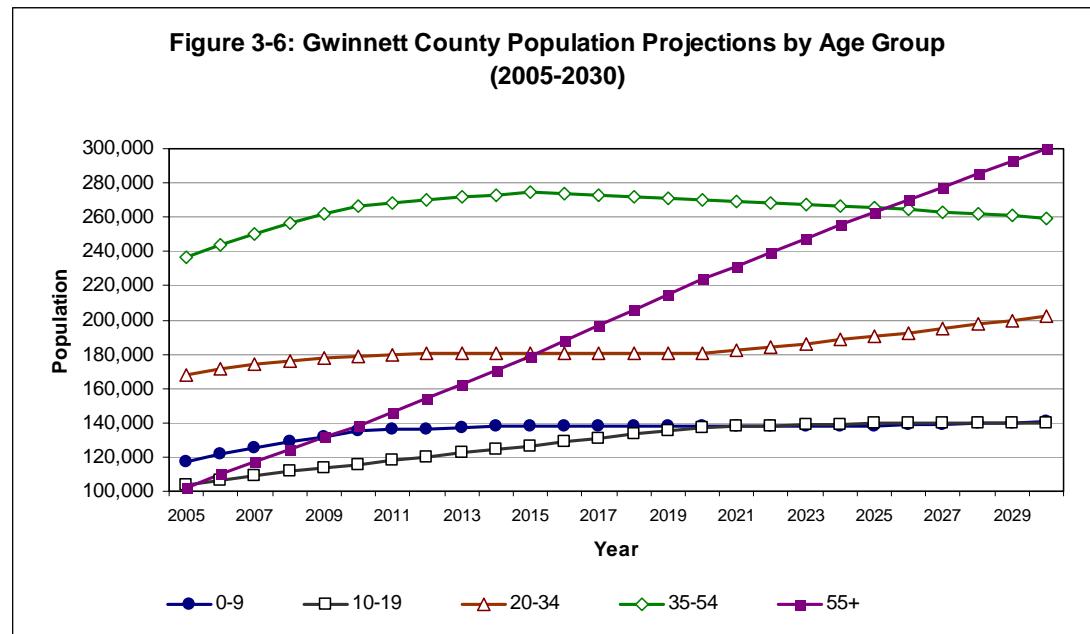
Estimated - July 1



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Source: Dr. Thomas Hammer, 2007



Source: Dr. Thomas Hammer, 2007

While the graph above provides a long-term perspective of changes in the County's age composition, a closer look at the short-term is required as it relates to this plan (see Table 3-2). Between 2007 and 2013, the 0-9 age cohort is expected to increase by 9%, the 10-19 age group by 12%, the 20-34 age group by 4%, the 35-49 age group by 9%, and the 55+ age group by 39%. Clearly, the most substantial growth is projected in the 55 years and older category even during the short-term.

Table 3-2: Projected Growth Rates by Age Group (Gwinnett County, 2007 to 2013)

Age Group	Population Forecast		Change (2007 to 2013)	
	2007	2013	Growth	%
0 to 9	125,443	137,212	11,769	9.4%
10 to 19	109,140	122,364	13,224	12.1%
20 to 34	173,885	180,379	6,493	3.7%
35 to 54	250,594	271,980	21,387	8.5%
55 and up	117,285	162,824	45,538	38.8%
Total	776,347	874,758	98,412	12.7%

Source: Dr. Thomas Hammer, 2007

In terms of age forecasts by geographic location for the period between 2007 and 2013, an analysis of the data suggests that RPA D will see the most substantial increase in all age categories (in real numbers), while RPA B is expected to see a decrease in its 20-34 age group and no major change in the number of 0-19 year olds. The 55+ age cohort will increase in all five RPAs across the County.

3.1.4 Household Composition

The composition of households experienced significant changes in the 1980s with a dramatic decline in "traditional" households (households with married adults and at least one child under the age of eighteen) and an increase in the number of single parent households. The 2005 American Community Survey data indicates that 21.6% of households with children under 18 in Gwinnett County are single-parent families. This is an increase from the 2000 Census, which found that 14.8% of households with children under 18 are single mother families. Of note, the 2000 Census did not collect data on single-father households, and this could in part account for the increase in lone-parent families between 2000 and 2005.

According to the 2002 Needs Assessment Survey, 55% of Gwinnett County's households contain no children. This statistic is confirmed in the 2005 American Community Survey results which find that 59% of households have no children under 18 years of age. Coupled with a dramatic aging of the population, it is important that Gwinnett County continue to assess its ability to meet the recreational needs of the older adult and senior markets.

3.1.5 Income and Education

Gwinnett County remains an affluent community, with the mean household income level increasing from \$70,206 to \$81,780 between 2000 and 2005. Furthermore, the percentage of persons 25 years and older with a bachelor's degree or higher increased from 29.6% in 1990 to 34.1% in 2000, although it remained stable through to 2005. Both college attendance and median household income levels in Gwinnett County continue to exceed Atlanta Region and State averages.

With education and income both being key indicators of recreational participation levels (research has suggested that a positive correlation exists), it is anticipated that Gwinnett County will continue to experience high levels of interest and demand for parks and recreation facilities.

3.1.6 Ethnic Communities

A tremendous increase in the ethnic and racial diversity is one of the most significant trends witnessed in Gwinnett County during the 1990s and early 21st century. While the County's total population increased by 106% between 1990 and 2005, the County's non-White population increased by nearly 860%. The percentage of the County's population identifying themselves as White (including Native American and multi-racial) decreased from 90.9% to 57.6% over this span, while the Black population increased from 5.2% to 17.4%, and Asians increased from 2.9% to 9.6%. The Hispanic and Latino population realized the greatest growth, increasing from 2.4% to 15.4% during this period.

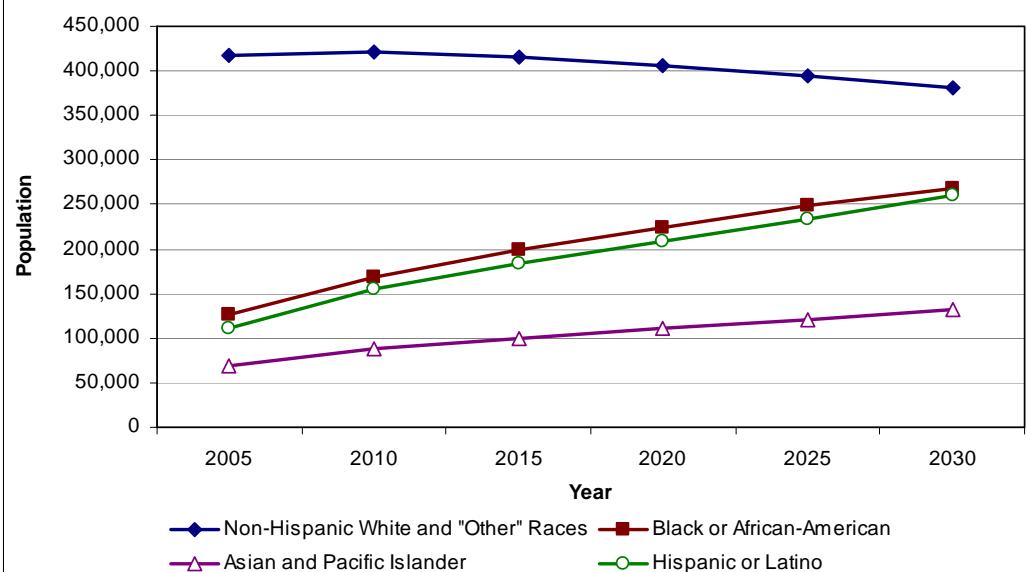
Table 3-3: Gwinnett County Ethnic Composition (1990-2005)

	1990	2000	2005
White (including American Indian, Alaska Native, and Multi-Racial)	90.9%	75.2%	57.6%
Black / African American	5.2%	13.3%	17.4%
Hispanic / Latino (any race)	2.4%	10.9%	15.4%
Asian and Pacific Islander	2.9%	7.2%	9.6%

Source: US Census Bureau (1990 and 2005); Dr. Thomas Hammer, 2007 (2005 estimates)

Based on the 2000 Census, RPAs A, B, and C are by far the most ethnically diverse areas of the County.

Forecasts suggest that growing ethnic diversity is expected to continue in Gwinnett County. Figure 3-7 indicates that the White races are projected to decline in overall numbers, while significant increases are anticipated for the Black/African American and Hispanic Latino communities and, to a lesser extent, the number of Asians/Pacific Islanders. The extent and nature of future growth and in-migration of these races is dependent upon a number of complex factors, making this data challenging to forecast; however, it is clear that growing diversity is very much a reality in Gwinnett County.

Figure 3-7: Gwinnett County Population Projections by Ethnic Communities (2005 to 2030)

Source: Dr. Thomas Hammer, 2007

An examination of detailed forecasts suggests that the general population trends for each race generally apply for all age groups, meaning that declines are anticipated in the number of children, youth and adults within the White races, while increases are projected for the other races. The only exception is the 55 and over category, which is expected to increase across all identified races.

3.2 LEISURE TRENDS

The analysis of trends is a critical factor in parks and recreation planning. An understanding of national and local trends will help Gwinnett County anticipate future demand for recreation and parks facilities. These trends are not just limited to those affecting participation in leisure activities – values and attitudes that people place on leisure also influence the environment, willingness to pay for services, and special needs.

The following trends are based on extensive research of National, State/Regional studies and published research from individual sport federations. To provide a “Gwinnett” face to these trends, local trends have also been identified using the participation data that has been provided by the County and by drawing comparisons between the County's 1995 and 2002 Parks and Recreation Needs Assessment Surveys.

Note: The reader will note some differences in the relative priority of some sports and activities. The discrepancies in some cases relate to differences in the age of the survey population, the frequency of participation, survey design, sampling methodology, etc. For the purposes of this analysis, which is intended to identify major trends and influences, these differences are not considered to be significant. The intent of documenting the trends is to provide a base for the Capital Improvement Plan, by articulating the major trends and influences that will affect the programs, services and facilities that need to be provided for residents.

3.2.1 Demographics

Aging and Household Composition

Nationally, the trend towards early retirement combined with an older age cohort that is living longer, is fitter and healthier, and has a higher disposable income indicates that there will be a growing need to consider older adults in recreation planning. Additionally, the aging of the ‘Baby Boom’ population will increase the percentage of older adults in Gwinnett and across the country. The 2005 Census data showed an increase in the percentage of the population over 55 years of age from 11.9% in 2000 to 14.0% in 2005¹. Trends research indicates that the new senior citizen will maintain many of their existing recreation preferences, although participation will be at a gentler pace.

While the importance of meeting the needs of older adults will grow in the coming years, Gwinnett generally has a relatively young population – when compared to other communities. In 2005, 41% of the households in Gwinnett County contained children under eighteen years of age².

From a recreation facility and programming perspective, Gwinnett County will have to continue plan for the needs of a significant number of young households with children as well as meeting the diverse needs of older adults. Young households are the traditional users of recreational facilities; however as the trends data indicates, older adults are becoming more active and are expected to be greater consumers of recreational programming and facility users than in the past. To the extent that is possible, the Capital Improvement Plan should also be supportive of

¹U.S. Census Bureau. (2005). 2005 Data Profiles. Available online at www.census.gov.

² Ibid.

park planning policies and improvements that work to reduce physical barriers which impede access to county parks (e.g. steep slopes on walking trails).

Income and Education

Participation in recreation has a high correlation to both the income and education of the participant. The National Survey on Recreation and the Environment 2000³ found that higher income earners have higher levels of participation and participate in a wider range of activities. Education is also a factor – participation in recreation increases with education levels. In Gwinnett, the mean household income in 2005 was \$74,209, significantly above the mean household incomes of Georgia and the United States (\$60,849 and \$62,556 respectively). As the average income and education levels of Gwinnett's population are higher than national averages, Gwinnett should continue to anticipate high levels of interest and demand for leisure facilities and programming.

The Gwinnett County Parks and Recreation Needs Assessment Survey (2002) reported low levels of County facility use by lower income households (under \$20,000). Barriers to participation for lower income households is a key consideration, specifically policies with respect to subsidies and aspects of recreational programming (i.e. location of facilities) should be considered in order to improve accessibility among lower income households. The issue that was identified in the 2002 survey was difficulty in accessing some neighborhood parks due to a lack of sidewalks and heavy traffic. The sheer physical size of Gwinnett makes access to parks difficult without the use of an automobile (there is only one park on a bus route). The County has begun linking multi-purpose trails into communities, and we recommend this approach continue. This will be furthered addressed in the recommendations of the Capital Improvement Plan.

Increased Racial and Ethnic Diversity

The American demographic profile is becoming more racially and ethnically diverse. This trend is also present in Gwinnett County. The 2005 Census data provides clear insight into the diversity in Gwinnett; there is a growing percentage of Asian and Hispanic or Latino persons (9.1% and 16.1% respectively). How does this influence recreation and leisure participation? Individual sport federations with declining numbers (e.g., USA swimming and USA Tennis) have developed programs that seek to attract a more diverse ethnic mix to their respective sports. While certain demographic variables may have more significance in terms of participation (e.g., income and education), sports such as soccer, which is the most popular sport internationally, serve to gain from the trend towards a more ethnically diverse population.

Ethnic diversity in other communities has resulted in increased demands for more educational programming for children and teens and - in areas experiencing growth in Asian communities - requests for more table tennis, tennis and badminton, to name a few. The Hispanic population of Gwinnett has specified a desire for locations and settings that enhance social interaction for the family as a unit. Park plaza designs, walkways, picnic areas, and informal play fields meet many of the needs of this ethnic community.

³ 1999-2002 National Survey on Recreation and the Environment, (Versions 1 to 13), USDDA Forest Service and the University of Tennessee, Knoxville Tennessee. <http://www.srs.fs.fed.us/trends/>

Work and Leisure Patterns

Lack of time is a primary barrier affecting participation in recreation. While older adults may have more time and money to participate in recreation, working age households are finding themselves to be increasingly "time-stressed" (the average travel time to work for Gwinnettians is 31.5 minutes⁴). This directly impacts recreational providers by heightening demands for longer hours of access and for multi-purpose facilities where more than one family member can participate at the same time (e.g., swimming, fitness, library, gymnasium activities, etc.). Study after study confirms that "lack of time" is one of the major factors influencing recreational participation; other factors include access to convenient facilities, safe environments, income and education.

Research investigating the needs of the older adult population has found that the 'Baby Boom' generation will "repeatedly cycle between periods of work and leisure"⁵. This may increase the need for older adult programming in the prime time hours, which is typically directed towards families.

The time crunch also affects children and is a significant issue for any recreation department, as children have traditionally been the major target group of recreation providers. Free time, defined as "time left over after eating, sleeping, personal care, attending school, preschool or day-care", has decreased from 40 percent to 25 percent of a child's day according to a 1998 study of American children 12 and under⁶. That study also found that the average amount of time spent outdoors each day has also declined dramatically. For the 9 to 12 age bracket, the average amount of time spent outdoors declined 50% between 1981 and 1998, from 95 minutes to 47 minutes. Given the pressures of school, homework and housework, programs and facilities must be convenient and accessible for Gwinnett County's children and adults alike.

Cyclical Nature of Sport and Leisure Participation

Trends related to sports participation must be closely tracked as the popularity of specific sports is cyclical in nature, and new 'hot' sports emerge every few years. Events and individuals play a role in the popularity of sport. For example, the explosion of soccer in the United States is partly related to the 1994 World Cup and the increasing ethnic diversity of the country. The Olympics and the performance of a given athlete or team can also influence participation. For example, gold medal wins in the last two summer Olympics have spurred interest in women's fast-pitch softball. World-class facilities in and around Gwinnett, as a result of the 1996 Summer Olympics, have also helped to promote certain sports.

An example of a 'hot' trend is non-motorized scooter riding – which gained popularity in the late nineties. The 2003 edition of the Superstudy of Sport Participation revealed that this activity was the 5th most popular sport amongst children over the age of six⁷. But by the 2005, participation in the use of non-motorized scooters decreased by 11.3%⁸.

⁴ 2005 Data Profiles. U.S. Census Bureau. Available online at www.census.gov.

⁵ Merrill Lynch, The New Retirement Survey for Merrill Lynch by Harris Interactive, 2006, <http://www.ml.com>

⁶ University of Michigan, Press Release, America's Children--- Part 1, How they Spend their time, November 6th, 1998 and Sporting Goods Manufacturing Association, published excerpt from Outdoor Recreation in America 2002, <http://www.umich.edu/~newsinfo/Releases/1998/Nov98/r110998a.html>

⁷ Sporting Goods Manufacturing Association, Press Release, Children's Sports Interest Run the Gamut, May 30, 2003; <http://www.sgma.com/press/2003/press1054214405-13555.html>

⁸ Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition. <http://www.sgma.com/associations/5119/files/p28b-05.pdf>

As noted earlier, the marketing programs of specific sport organizations can also influence sport participation. For example, USA Tennis has in the past offered free tennis lessons and is actively promoting their sport among populations that have historically not played the game. USA Baseball has similar plans in place.

From a recreation provider's perspective, it is essential that participation trends for sport and leisure activities be closely monitored in order to determine if the activity is emerging, has peaked, or is on the decline.

3.2.2 Participation in Recreation and Leisure

Outdoor Participation Trends

Table 3-4 shows the percentage of persons 16 years and older in the United States who participated in twelve different categories of outdoor recreation activities. The factors that link the most popular activities are their low cost, minimal physical exertion and that no special equipment or developed skills are required. Of the ten most popular activities, four focus on viewing and learning.

Table 3-4: National Participation Levels in Outdoor Activities (2000-2002)

Type of Activity	Population 16 or older (millions)
Participated in Any Activity	98.5
Trail/Street/Road Activities*	90.3
Traditional Social Activities (e.g. picnicking)	83.4
Viewing and photographing activities	80.5
Viewing and learning activities	72.6
Driving for pleasure	66.9
Swimming activities	66.3
Outdoor Adventure activities	61.5
Boating/floating/sailing activities	41.3
Fishing	34.1
Snow and Ice Activities	29.2
Outdoor Team Sports	29.6
Hunting	12.3

* includes bicycling, mountain biking, walking, horse riding and hiking.

Source: 1999 –2002 National Survey on Recreation and the Environment, USDA Forest Service and the University of Tennessee, Knoxville, Tennessee, <http://www.srs.fs.usda.gov/trends/Nsre/update032502.pdf>

The National Survey on Recreation and the Environment (NSRE), which is the oldest on-going outdoor participation survey in the U.S. (first survey in 1960) has shown an increase in the proportion of Americans who are participating in outdoor activities. The latest Study by NSRE found substantial growth in bird watching (235.9%) and walking (91.2%)⁹.

⁹ Cordell, K., G. Green (US Forest Service, Athens Georgia) & B. Stephens (University of Tennessee) Trends 2000:Outdoor Recreation: An American Lifestyle Trend, <http://www.srs.fs.fed.us/trends>

Gwinnett County residents have also signaled their interest in parks and open spaces in the 2002 Needs Assessment Survey. Eighty-four percent (84%) of respondents said they support the use of SPLOST monies for parkland acquisition and development¹⁰. This is consistent with the results of the 1995 Gwinnett County Parks and Recreation Needs Assessment Survey at that time 82% of respondents support renewal of the 1% local option sales tax to improve or expand county parks.

Trails and Linkages Best Bet for Meeting Fitness/Leisure Needs

The single most popular outdoor activity according to the most recent NSRE study (1999-2002) is walking outdoors, followed by recreational bicycling¹¹.

Of the top five most popular sports in the USA in 2004, recreational walking (92.8 million participants) was ranked second, surpassed only by recreational swimming (95.3 million participants). While there is a difference in ranking between the NSRE studies and the Superstudy reports, walking is clearly a favored activity. Table 3-5 shows the relative ranking of sports that use trails and linkages from 1998 to 2004, based data from the Superstudy of Sports Participation. Fitness walking, day hiking and running/jogging have risen in popularity. Regardless of the survey instrument, walking and trail related activities are among the favored activities of the American public.

Table 3-5: Ranking of Sports that use Trails and Linkages (2000 - 2002)

Sport Activity	2000	2001	2002	2003	2004
Recreational Walking	2	2	1	1	1
Recreational Bicycling	4	4	3	2	3
Day Hiking	9	12	12	11	11
Fitness Walking	13	13	11	12	10
Running/Jogging	14	14	13	11	11
In-Line Skating	16	18	19	20	23

Note: Ranks are based on those 6 years of age or older, participating at least once per year.

Source: Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition. <http://www.sgma.com/associations/5119/files/p28b-05.pdf>

The Gwinnett County Parks and Recreation 2002 Needs Assessment Survey also found trails and open space parks/greenways to be very important to Gwinnett residents. When asked about favored activities at County Operated facilities, walking emerged as a clear favorite (38% of respondents), significantly above the next favored activity (swimming 8%).

Walking was the single most frequent activity for each of the following age groups in Gwinnett County:

- 18-30 year olds (29%)
- 31-54 year olds (37%)
- 55+ (45%)

¹⁰ Gwinnett County Parks and Recreation 2002 Needs Assessment Survey, The A.L. Burruss Institute of Public Service, Kennesaw State University, Kennesaw, Georgia

¹¹ 1999-2002 National Survey on Recreation and the Environment, USDA Forest Service and the University of Tennessee, Knoxville Tennessee. <http://www.srs.fs.fed.us/trends>

Based on the Needs Assessment Survey and national trends, Gwinnett County should continue to focus on trails and greenways as the County's network of trails and open spaces collectively address many of the preferred recreational activities of its residents.

Importance of Community-Owned Facilities for Youth Sports

The National Council of Youth Sports 2001 membership survey indicates that 52% of indoor programs rely on community-owned facilities. For outdoor programs, 83% rely on community-owned facilities, suggesting that local jurisdictions play an important role in providing facilities for youth sports.¹² According to the Gwinnett County 2002 Parks and Recreation Needs Assessment Survey, 74% of respondents used a county park facility for recreational or leisure activities which indicates that, in Gwinnett, the public at large rely heavily on community owned facilities.

Health and Fitness Levels

According to the U.S. Center for Disease Control and Prevention over one half of adults in Georgia did not meet the recommended level of physical activity¹³. Recommended level of physical activity is defined as engaging in moderate activity at least 5 times per week for 30 minutes (gardening, walking, leisure bicycling, etc.) or rigorous activity at least 3 times per week for 20 minutes (running, heavy yard work, etc.). Although, as noted previously, education and income are positive predictors for higher levels of activity, which suggests that Gwinnett residents are likely to exceed the state's activities levels.

The percentage of Georgians that meet the recommended level of physical activity has essentially remained stagnant since 2001. The table below provides a snapshot of the physical activity levels in Georgia from 2001 to 2005.

Table 3-6: Levels of Physical Activity in Georgia, 2001-2005

	2001	2003	2005
Recommended Level of Physical Activity	39.2%	41.6%	41.5%
Insufficient Level of Physical Activity	38.7%	40.1%	41.2%
Inactive	22.1%	18.3%	17.3%

Source: U.S. Center for Disease Control and Prevention. (2005). U.S. Physical Activity Statistics.; <http://apps.nccd.cdc.gov>

Obesity levels are a concern nationally. The "epidemic" of childhood obesity is fuelling new federal initiatives to increase activity and fitness levels among American youth. The President's Council on Physical Fitness and Sports Strategy targets improved levels of activity within the school system. However, the strategy also identifies the need for "communities to develop and promote the use of safe, well maintained and close to home sidewalks, crosswalks, bicycle paths, trails, parks, recreational facilities"¹⁴.

Historically, teenagers have been the fittest age group, however, trends research shows declining participation numbers for the 12-17 year age bracket. According to the 2001 Superstudy Report, seniors were the most physically active age group (26% of those over the

¹² National Council of Youth Sports, Report on Trends and Participation in Organized Youth Sports (2001 edition); <http://www.ncys.org>

¹³ U.S. Center for Disease Control and Prevention. (2005). U.S. Physical Activity Statistics.; <http://apps.nccd.cdc.gov>

¹⁴ Presidents Council on Physical Fitness and Sports Fact Sheet, http://www.fitness.gov/physical_activity_fact_sheet.html

age of 55 were frequent fitness participants) whereas only 18% of the 12-17 age bracket were frequent fitness participants. This statistic has two implications for Gwinnett: one being that adults and older adults in particular, are going to be using County facilities in increasing numbers; the other that the County should anticipate greater efforts on the part of local community organizations to engage the inactive teenager in active recreation. As a direct provider of recreational programming, the County should also ensure that its own programming helps youth get the “fitness hook” or get hooked on fitness.

In Gwinnett, the 2002 Needs Assessment Survey reported that the majority of families of households with young children believe that the County is doing an excellent job of meeting the needs of their children. The Survey concluded that a “substantial” number of respondents believe that the County could be doing a better job of meeting the needs of teenagers, young adults (20 to 30) and seniors. Facilities and programs aimed at young adults, seniors, and teens, therefore, need to be given additional consideration during future planning. Note: only 14% of respondents over the age of 54 felt that the County was doing an “excellent job” meeting their needs.

Planning for the “New” Senior

Looking specifically at the facility/programming needs of older adults, the trends research suggests that the recreational pursuits of the “new and future” senior citizens are going to be different from previous generations. While the senior citizen of past generations pursued more passive activities, today’s senior citizen is, as previously mentioned, fitter and more interested in maintaining their current exercise habits, albeit at a more leisurely pace. The traditional dedicated seniors’ facility typically does not permit a range of active recreational pursuits. To better meet the needs of the “new” senior, Gwinnett should look to a multi-purpose facility model where a range of active and passive recreational opportunities can be provided.

Some of the specific facility and programming trends associated with older adults:

- increased demand for lifelong learning, which could be partially accommodated by providing computer stations in recreation centers to meet the growing interest of older Americans in digital technology, web design, emailing, etc.;
- fitness pools for water walking, water aerobics and lap swimming with warmer water;
- a re-thinking in terminology; the aging baby boomers don’t consider themselves to be “Seniors”; terms to use instead of “senior center” include adult center or social center;
- some trend watchers anticipate lower time commitments to volunteering which could have an impact on parks and recreation agencies who rely on older volunteers;
- shift in programming for seniors, with interest in yoga and pilates continuing to increase;
- life long learning / interest in short courses/workshops; and
- increasing demand for activities and programs during peak hours, as the “new” senior is predicted to cycle in and out of work throughout their retirement.¹⁵

¹⁵ Ziegler, J. “Recreating Retirement: How will Baby Boomers reshape leisure in their 60s? National Park and Recreation Association, http://www.nrpa.org/story.cfm?story_id=1222&departmentID=18&publicationID=11

Teen Recreation/Leisure Needs Rising to the Top of the Agenda

Survey after survey finds that the needs of teenagers are less well served than other age groups. Due to the sheer size of the age cohort at this time (children of the baby boomers), the voices of teenagers have become louder. The trend research indicates that individual sports such as skateboarding and in-line skating are popular with teens as well as activities such as wall-climbing.

In research undertaken by Monteith Brown Planning Consultants in other jurisdictions the message from teens and the list of facility "wants" have been consistent:

- dedicated space for teens which provides an opportunity for casual socializing and a range of active and passive recreational activities;
- basketball;
- skateboarding; and
- age segregated opportunities at recreational facilities; for example, the 17 year old does not want to swim or play basketball with a 12 year old.

Female Participation Increasing

Girls and women are participating in outdoor recreation and sports generally in greater numbers. The National Council of Youth Sports Annual Survey (2001 edition) reported that girls are participating at younger ages but that the overall percentage of boys and girls participating has remained the same since 1997 (63% for boys and 37% for girls). Female participation increased for every age group other than the 16-18 year age group¹⁶. When it comes to organized sport, the 2000 Survey of Organized Youth Team Sports Participation in the U.S.A indicates that there is greater gender parity (59% boys, 48% girls)¹⁷. Looking to the future, Gwinnett can anticipate increased numbers of girls and women participating in sports and recreation.

3.2.3 Participation in Team Sports

General

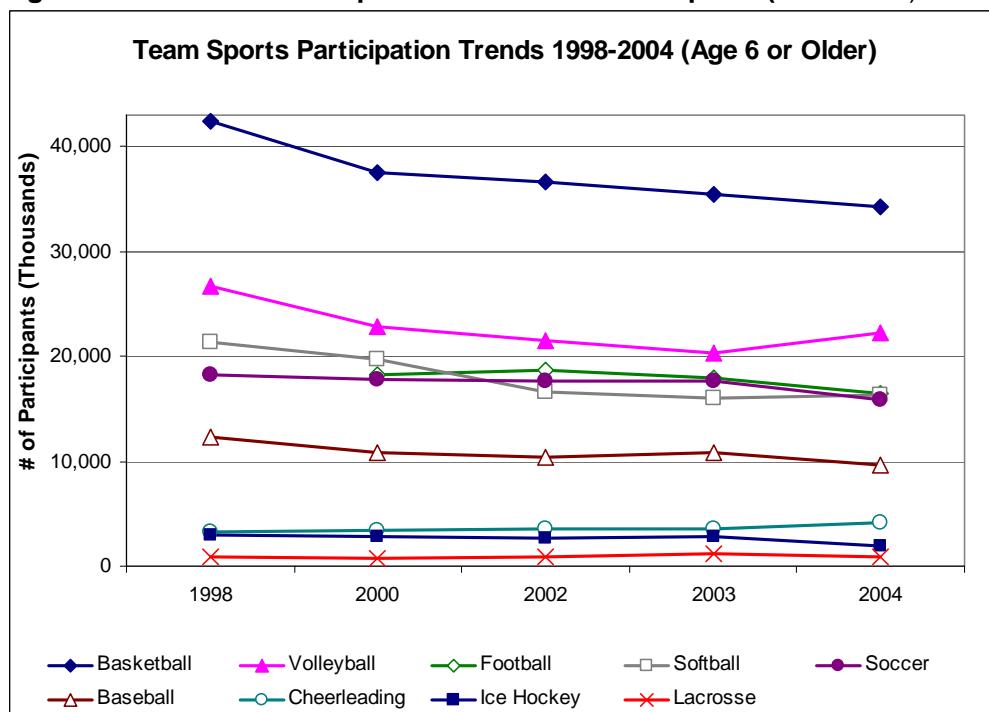
The Annual Superstudy of Sports Participation (2005 Edition) identified that the largest gains in sport participation between 1998 and 2004 were in the elliptical motion trainer, yoga/tai chi, wall climbing and kayaking. The largest number of active participants, however, is still engaged in team sports; approximately 26 million Americans (ages 6 to 24) were "frequent" participants in team sports (25+ days a year) compared to 14.2 million "frequent" participants in identified "extreme" sports.¹⁸ This suggests that despite the emphasis on more individual activities, the provision of facilities to meet the needs of team sports will continue to be a focus for recreation departments. From a facility provider's perspective, there is a need to recognize the diversity of recreation pursuits and to promote a variety of opportunities.

¹⁶ National Council of Youth Sports, Report on Trends and Participation in Organized Youth Sports (2001 edition); <http://www.ncys.org>

¹⁷ Sporting Goods Manufacturers Association, Press Release, New Survey: 54% of U.S. Youngsters Play Organized Sport; <http://www.sgma.com>

¹⁸ Sporting Goods Manufacturing Association, Press Release. Growth of New Millennial Pursuits Outpaces Traditional Activities, August 1, 2002; http://www.americansportsdata.com/pr_08-01-02_3.asp

Figure 3-8: National Participation Levels for Team Sports (1998-2004)



Source: Sporting Goods Manufacturing Association, [Sports Participation Topline Report – 2005 Edition](http://www.sgma.com/associations/5119/files/p28b-05.pdf). <http://www.sgma.com/associations/5119/files/p28b-05.pdf>

Figure 3-8 shows that participation levels in team sports declined between 1998 and 2004 for all major team sports. The single most popular sport for all ages is basketball. A decline in participation in pick-up games is one of the major factors that industry experts attribute to the decline in team sports.

Youth Sport Participation

The most recently released survey of the most popular sports for youth rising out of the 2003 Superstudy of Sports study (based on frequent participation defined as 25+ days a year), found that 6 of the top 15 sports were team sports, the most popular being basketball. In-line skating, skateboarding, and fishing are some of the more popular individual sports or activities for American youth.

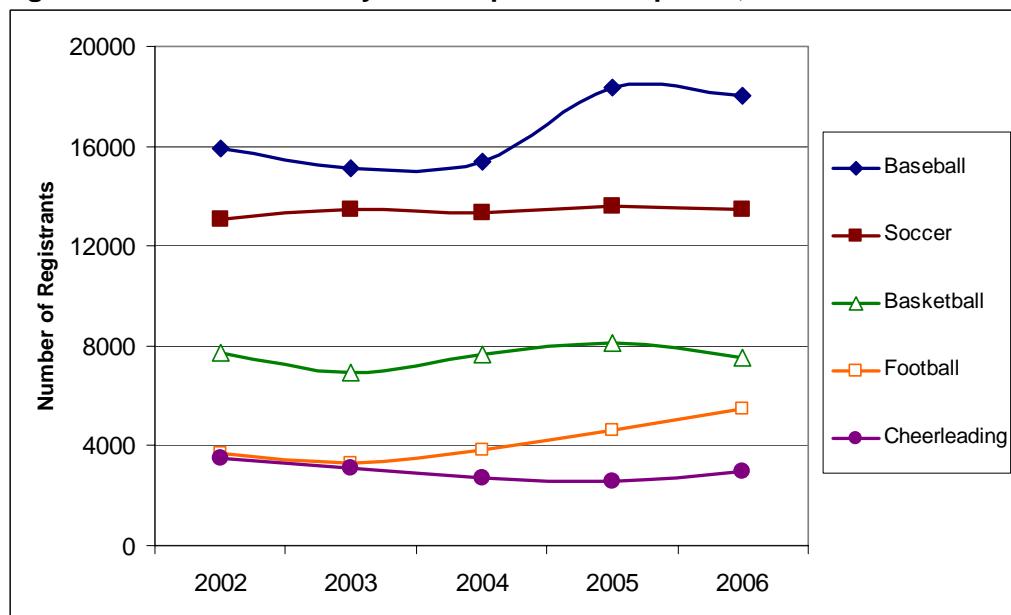
Table 3-7: Most Popular Organized (team) Sports for Youngsters (6-17) in 2000

Rank	Sport	Total Participants (millions)
1	Basketball	10.0
2	Soccer	9.6
3	Baseball	7.5
4	Slow Pitch Softball	3.6
5	Tackle Football	2.9
6	Swimming/diving	2.7
7	Track and Field	2.6
8	Volleyball (court)	2.4
9	Cheerleading	1.9
10	Touch Football	1.4
11	Fast-pitch Softball	1.4
12	Tennis	1.1

Source: Sporting Goods Manufacturers Association, excerpt from Organized Youth Team Sports Participation in the US, Press Release "New Survey: 54% of U.S. Youngsters Play Organized Sports", May 1, 2001 http://www.daconline.net/press_release's.htm

Figure 3-9 illustrates the cyclical nature of youth team sports in Gwinnett County over a six-year period. This graphic shows that, while registrations have increased in all sports, relative to the population only soccer and football have seen increases, while youth baseball/softball and basketball have been capturing fewer and fewer of the youth population in recent years.

Figure 3-9: Gwinnett County Youth Sports Participation, 2002-2006



Source: Gwinnett County Parks and Recreation Division

Generally, Gwinnett children and teens mirror the sport and recreational pursuits identified in national trend surveys. There are some differences; basketball appears to be more popular on a national scale, while baseball has higher rate of participation in Gwinnett than nation-wide. Table 3-8 provides a summary of the favored activities by Gwinnett County children and teenagers.

Table 3-8: Favored Recreational Activities of Gwinnett Children & Teenagers

Gwinnett Children (under 13)		Gwinnett Teenagers (13 to 17)	
Activity	Percentage	Activity	Percentage
Swimming	31%	Basketball	27%
Playgrounds	24%	Swimming	24%
Soccer	20%	Baseball	20%
Baseball	20%	Soccer	18%
Bicycling	20%	Football	17%
Basketball	17%	Softball	9%
Softball	9%	Running/jogging	9%
Tennis	9%	Cheerleading	8%
Gymnastics	4%	--	--
Skating	4%	--	--

Source: Gwinnett County Parks and Recreation 2002 Needs Assessment Survey, the A.L. Burruss Institute of Public Service, Kennesaw State University, Kennesaw, Georgia

The Survey of Organized Team Sports Participation (2000) also identified the relationship between income and sport participation. Nationally, households with organized youth team sport members have an average annual income of \$64,500, 15% higher than the average household income of \$56,200 for all families with children ages 6 to 17. One third of youth sport participants had an average annual income of \$75,000 or more.¹⁹

Soccer

After years of tremendous growth, soccer participation may have peaked. Reported data from the 2005 Superstudy of Sports Participation (2004 participation data) shows a decline in soccer participation by 10% from 2003. Participation among core players (those who play 52 days or more), however, increased by 8.2 percent between 2002 and 2003. From a recreation facility provider's perspective this indicates that while the number of players may be registering a decline, field use may in fact be increasing due to an increasing number of players with greater numbers of practices and games.

In Gwinnett, soccer participation numbers declined slightly between 2000 and 2002 according to statistics provided by the Community Services Department. Between 1997 and 2002, however, soccer registration figures increased by nearly 50% in Gwinnett, illustrating the rapid growth in the late 90s. While the numbers of participants in baseball/softball are still higher than soccer in Gwinnett, the 2002 household survey found that there was no difference in the relative popularity of soccer and baseball (not including softball) amongst children under 13.

The 2003 national data that is available indicates that adult participation in soccer is growing. A 30% increase was observed between 2002 and 2003 for adults 18 years and older, while a 97% increase was tracked for the 25-34 age bracket²⁰. This is likely tied to youth participants aging into adult age groups and continuing to pursue the sport. There is limited evidence that this trend exists in Gwinnett, however, this may be due to a lack of "adult quality" fields. Looking to the future, however, the County should anticipate an increase in adult players.

¹⁹ Sporting Goods Manufacturers Association and the National Council of Youth Sports, Press Release, New Survey: 54% of U.S. youngsters play Organized Sports, May 1, 2001; http://www.daonline.net/press_release's.htm

²⁰ Sporting Goods Manufacturing Association, Press Release, Soccer, Not just for Children, June 9, 2003, <http://www.sgma.com/press/2003/press1055170659-6754.html>

Although more men than women play soccer, an increasing number of girls and women are playing the sport, spurred on no doubt by the success of the American Women's soccer team.

While soccer participation levels appear to have peaked (nationally and in Gwinnett), the physical aspects of the game, its high fitness quotient and its popularity amongst ethnic communities suggest that soccer will remain a popular activity.

Baseball/Softball

Baseball and softball have been in decline in the U.S. since 1993. The one exception to this has been fastpitch softball, which grew by over 15% between 2003 and 2004. Recent reports indicate that approximately 62% of fastpitch players are women.²¹ In absolute terms, 2004 baseball participation numbers are 24% below 1998 levels²².

In Gwinnett, baseball and softball have the highest participation levels amongst team sports. The spring baseball and softball sessions, which attract the largest number of participants, however, registered a 14% decline between 2000 and 2002. The trend data suggests that Gwinnett should anticipate continued declines in baseball and softball.

That being said, the number of children and teens participating in baseball remains significant. For those athletes that are seeking a competitive edge, a variety of privately-operated specialized training facilities existing in the County that provide instruction, camps, and even travel leagues.

Football

Football has experienced marginal decline since 1998 (1.3%), but has declined significantly between 2003 and 2004 (19.3%). While Touch Football has a higher number of participants, its participation levels have been declining at a greater rate than Tackle Football²³. Though, at the high school level, football is the number one participant sport (for boys).²⁴

Participation rates for youth football in Gwinnett County have increased slightly over the past few years to approximately 4% of the 6 to 14 age group, suggesting that in the cyclical nature of sport participation, football may be on the upswing in the County.

Basketball

While basketball remains the most popular team sport, growth has been leveling off since 1998 (See Figure 3-9). Within the sport, the fastest growing segments are young children (6 to 11) and adults. Further growth in the sport is anticipated as more girls take up the sport. In Gwinnett, basketball participation rates have been steady over the past three years, capturing nearly 6% of the 5 to 18 age group.

²¹ Sporting Goods Manufacturing Association, Press Release, Fast-Pitch Softball Becoming Popular June 30, 2003, <http://www.sgma.com/press/2003/press1056985416-14826.html>

²² Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition. <http://www.sgma.com>

²³ Ibid.

²⁴ National Federation of High School Association, High School Participation Rates 2001-2002, <http://www.laxpower.com/common/ParticipationRates2002.php>

Cheerleading

Cheerleading has experienced strong growth since 1998, although the actual number of participants is relatively low. Between 1998 and 2004 the participation rate increased by 27%, which is the highest growth rate of all team sports. In Gwinnett there was a 5% increase in participants between 2000 and 2002, which can be attributed to overall population growth.²⁵

3.2.4 Leisure Trends - Individual Recreation Activities

Aquatics

Recreational swimming is the number one activity in the United States, with 95.3 million participants over the age of 6. While it was found that recreational swimming was more popular than walking, it is growing at a slower rate²⁶. The 2005 Superstudy of Sports Participation identified a 1% growth in swimming participation between 1998 and 2004. An analysis of recreation participation trends from 1980 to 1996, confirmed that swimming is in a "slow or no-growth" situation, although increases were seen in seniors' participation (age 65+)²⁷.

Swimming is promoted by aquatics enthusiasts as a "cradle to the grave" activity. The greatest demand is typically from the younger ages who are participating in learn to swim programs. Participation in swimming often drops off in the teen years. Adult participation, however, is growing and trend data has identified new seniors (aging baby boomers) as the "new fit generation". Therapeutic and fitness swimming (aerobics and laps) are also emerging as popular activities for adults. There were 5.8 million participants in fitness in 2005.²⁸

Nationally, USA Swimming has programs in place to promote increased participation in competitive swimming amongst economically disadvantaged groups. Gwinnett's demographic profile (higher than average income levels) is a good fit for competitive swimming. According to USA Swimming, it costs swimming families approximately \$1000-\$2000 annually per child to participate in the sport. Gwinnett's swim teams and schools have produced many state champions over the years.

In Gwinnett, the 2002 Needs Assessment Survey found that swimming (8%) ranked second to walking (38%) as a most frequent activity in a county park. Swimming was identified as the favorite activity of children under the age of 13 in Gwinnett, and was ranked just below basketball as a favorite activity for teens.

The most significant trend in recent years in aquatic facility development and design has been the leisure pool. This trend, which began in the 1980s, continues with the addition of an increasing number of interactive play features that have turned the indoor and outdoor pool into entertainment facilities.

²⁵ Sporting Goods Manufacturing Association, Press Release "New Survey: 54% of U.S. Youngsters Play Organized Sport", May 1, 2001, <http://www.sportlink.com/press/2001/press988721108-300622.html>

²⁶ Sporting Goods Manufacturing Association, Press Release, "Top 30 most popular Sports in the U.S.A.", April 4th, 2002; http://www.goodnewsforsports.com/NewsRelease/archive/1202/0502_ActivitiesDominate.htm

²⁷ Warnick, R.B. "Recreational Participation Trends: Generational Patterns and Change", University of Massachusetts at Amherst, Amherst Massachusetts; http://www.prr.msu.edu/trends2000/pdf/warnick_generations.pdf

²⁸ Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition. <http://www.sgma.com>

The challenge for pool operators is to maximize programmable space: accommodating programming and activities for all ages. Features such as body and drop slides, lazy rivers, splash/spray pads, etc. are becoming standard items in family aquatic centers. The diving board is also making a resurgence. Incorporating shade features (sun umbrellas/sunshade structures) for staff and patrons at outdoor facilities is now standard practice. Some jurisdictions are also developing “adults only” tanks.²⁹ Gwinnett’s family aquatic centers are very much in line with these trends.

Tennis

While the Superstudy of Sports (2005) indicates that tennis participation has declined by 13.2% over the past 17 years (for those participating at least once a year), recent data demonstrates an upswing in participation levels³⁰. In fact, between 1998 and 2004, tennis participation increased by 8.3%. Absolute participation in tennis was 18.3 million in 2004. A study found that 75% of players rely on public courts and that female participation is growing (52% of new players are women). There is also growing ethnic diversity on the court (one out of every three new players are Hispanic or African-American). This latest study also reported that the average age of new players is 18, while the average age of all players is 29.³¹

The Tennis Association 2003 Study identifies the states with the highest levels of tennis participation as California, New York, Florida, Texas and Illinois. However, the 2003 State-by State index prepared by the National Sporting Goods Association, reports that Georgia has above average participation in tennis. As noted previously, tennis is identified as the 12th most popular sport for youth across the nation.

Demographically, tennis is a sport that has an association with income; a majority of tennis players come from higher income households. This is a good fit with Gwinnett, suggesting that the current popularity of tennis in Gwinnett will continue.

Golf

Golf is identified as the 14th most popular sport in the U.S., according to the 2003 Superstudy Report. A study of frequent participants (25 days or more) indicated that frequent golf participants declined 14% from 1998 to 2004. There were 30.4 million players in 2000 and 25.7 million in 2004.³²

60% of frequent golf participants are over the age of 45 and 80% of the frequent players have an average household income in excess of \$50,000. The largest playing group is college educated according to the SMGA study of frequent sport participants.

The golf industry, as represented by the National Golf Foundation, is anticipates continued popularity in golf although the Foundation recorded a slight decline (1.3%) in total participants

²⁹ Bales, Beth “The water is Great, Come on In! The latest trends in pool design”, Parks and Recreation (Journal of the Nation Recreation and Parks Association), November, 2002

http://www.nrpa.org/story.cfm?story_id=1278&departmentID=18&publicationID=11

³⁰ American Sports Data, Inc. Sector Analysis Report, Press Release “Growth of New Millennial Pursuits, outpaces traditional activities”, August 1, 2002; http://www.americansportsdata.com/pr_08-01-02_3.asp

³¹ United States Tennis Association, Press Release, March 20, 2003, “USA and TIA Complete Most Comprehensive Research in Sports”

<http://www.mtatennis.com/HmpgArticles/USTA%20facts/USTATIAPARTICIPATIONSTUDY3.20.03FINAL.doc>

³² Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition.
<http://www.sgma.com>

between 2002 and 2003. While overall participation dipped slightly, there was an increase in the number of junior participants. The golf industry anticipates future growth as children of the baby-boomers take up the sport.³³

The Sporting Goods Manufacturing Association reports that there has been some scaling back of new golf course construction and a reduction in the number of new courses being built.

From a recreation department's perspective, the industry reports suggest that demand for junior golf programs will be high. Gwinnett's youthful demographic profile combined with its higher household income and education levels suggest that demand for golf instruction programs will be strong in Gwinnett.

According to the 2002 Needs Assessment Survey, golf was identified as a favorite activity by 12% of households, behind tennis (13%) and ahead of fishing, watching TV and hiking.

In-line Skating

In-line skating reached its peak in 1998, with 32 million participants. This was an increase of 580% from 1990 participation levels. Between 1998 and 2004, participation levels for in-line skating decreased substantially to 17.4 million participants (84% decrease). In-line skating, however, remains a very popular activity, second only to basketball for children over the age of six.³⁴

Skateboarding

Participation levels in skateboarding have leveled off since its rapid growth between 1998 and 2002. In 2004, 10.6 million over the age of 6 participated at least once in skateboarding. Three quarters of all skateboarders are male and the vast majority is under the age of 18.³⁵ The sport was ranked 8th in popularity nationally for children over the age of 6 in 2002. Interestingly skateboarding was not on the list of favored activities for 13 to 17 year olds in Gwinnett and was on the bottom of the list for children under 13 in the Gwinnett County Needs Assessment Survey (2002). This should not, however, necessarily be interpreted as evidence that children in Gwinnett are less interested in skateboarding; adults are not always good at translating the needs of teenagers in survey instruments in our experience.

³³ National Golf Foundation and the National Golf Course Owners Association, Golf 20/20; <http://www.Golf2020.com>

³⁴ Sporting Good Manufacturing Association, Sports Participation Topline Report – 2005 Edition.

<http://www.sgma.com>

³⁵ Sporting Goods Manufacturing Association, Press Release, "Skating- Riding a Wave of Popularity", July 2 ,2003, <http://www.sportlink.com/press/2003/press1056987137-26038.html>