

SECTION 3: Demographic and Leisure Trends

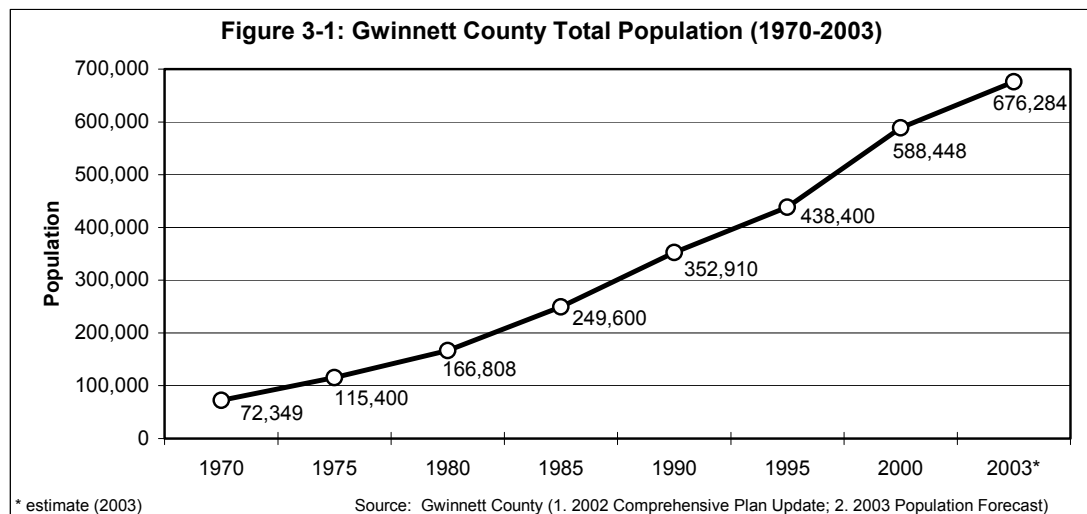
The Master Plan is a forward-looking strategic document that will guide the provision of parks and recreation facilities and services within Gwinnett County to the year 2009 and beyond. In order to understand the current and future needs of the County's citizenry, we must first examine the composition 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

Prior to commencing this Master Plan project, a Needs Assessment Survey was undertaken by the A.L. Burruss Institute of Public Service at Kennesaw State University in 2002 on behalf of Gwinnett County. While the details of the household survey will be discussed in the next chapter of this report, the Needs Assessment also compiled a demographic profile of Gwinnett County. The following analysis incorporates the key findings of the demographic profile contained in the 2002 Needs Assessment and contains a more detailed examination of key variables using data generated by the U.S. Census and Gwinnett County.

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. The Gwinnett County Department of Financial Services estimates that there are 676,284 people living in Gwinnett County in 2003.



Section 3: Demographic and Leisure Trends

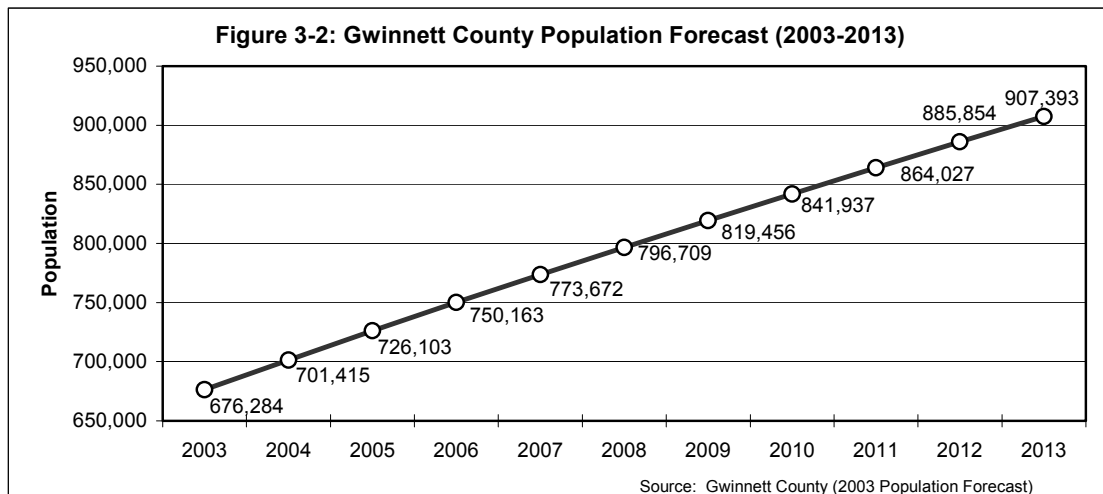
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Since 1970, Gwinnett County has attracted a significant portion of the growth in the Atlanta Region. Proportionally, Gwinnett County's population growth has accounted for over one-quarter of the Atlanta Region's growth in the past three decades. In 1970, 5% of the Region's population lived in Gwinnett County; by 2003, it is estimated that this figure increased to 18%.

The Gwinnett County Comprehensive Plan (2002 Update) indicates that the largest population gains in the 1990s occurred in the central and northeastern areas of the County. Significant neighborhoods experiencing higher than average growth include the area northeast of Lawrenceville, Harbins, Loganville, Alcovy River, Centerville, and Grayson. While growth occurred throughout all areas of Gwinnett County during the 1990s, the County's primary population growth pattern has 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 into the near future. Population densities by census tract are shown on Map 3-1.

3.1.2 Population - Future

Based on the population forecast generated by the Gwinnett County Department of Financial Services, it is estimated that the County's population will continue to increase, but at a slightly declining rate (see Figure 3-2).



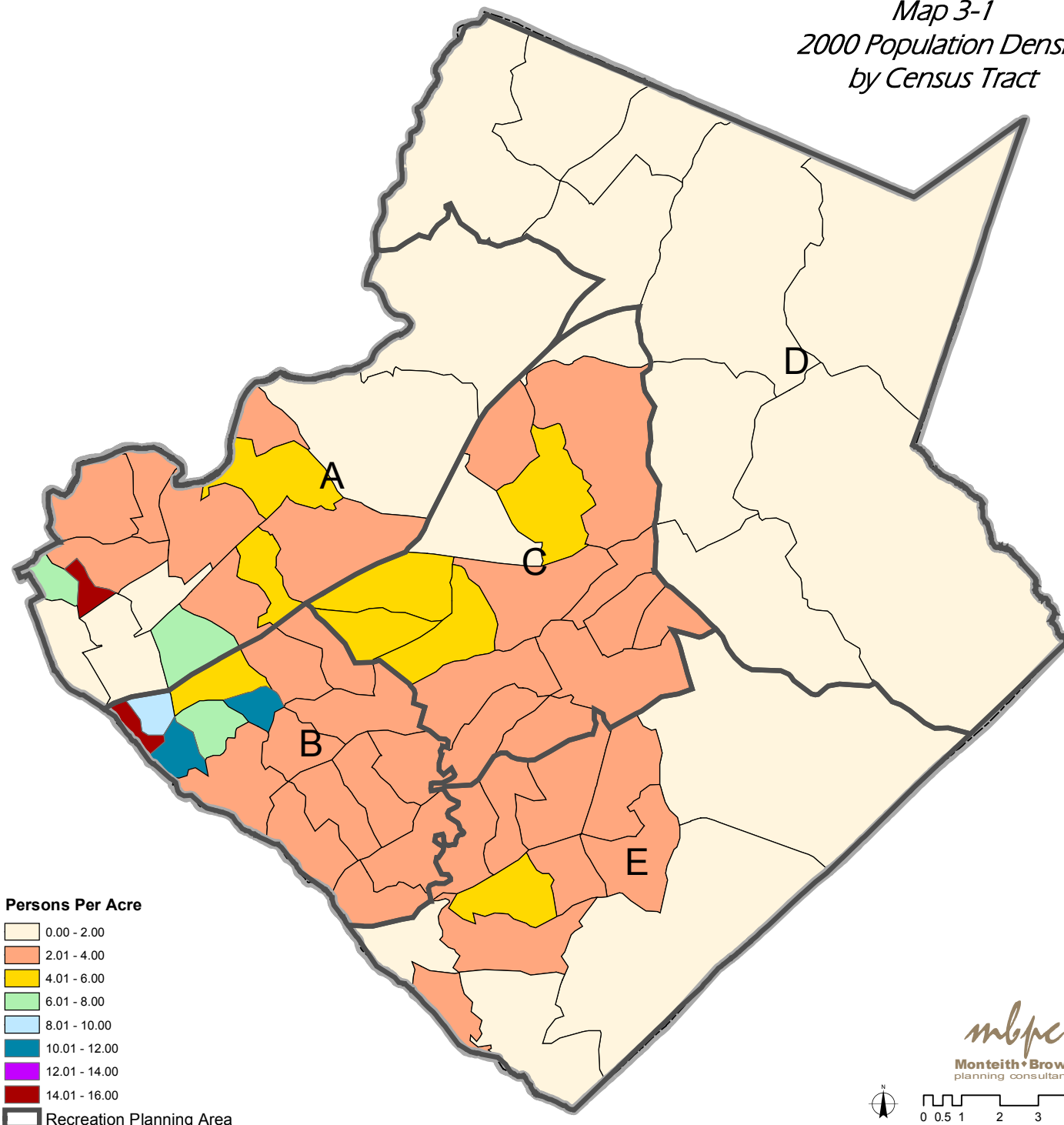
For the period of 2003 to 2013, the County's population is forecasted to grow by 231,000 people (an average of over 23,000 people per year), representing a 10-year growth rate of 33%. Table 3-1 illustrates Gwinnett County's declining growth rate over the years.



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*Map 3-1
2000 Population Density
by Census Tract*



0 0.5 1 2 3 4 Miles

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Monteith•Brown
planning consultants

**POPULATION DENSITY
BY RECREATION PLANNING AREA**

Planning Area	Land Area (Acres)	Total Population	Population Distribution (Persons per Acre)
A	49754	136028	2.73
B	26528	114069	4.30
C	42902	150202	3.50
D	99703	90124	0.90
E	59534	98025	1.65
TOTAL	278420	588448	2.11

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

Time Period	Population Growth	Growth Rate
1970 to 1980	94,459	131%
1980 to 1990	186,102	112%
1990 to 2000	235,538	67%
2000 to 2010	253,489	43%
2003 to 2013 (timing of Master Plan)	231,109	33%

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.

Population projections are not currently available by geographic area or recreation planning area. As noted earlier, however, population growth is expected to continue along the major interstate and highway corridors through both new greenfield development and intensification of existing neighborhoods. The establishment of greater densities in built areas will only intensify the need for additional and appropriate parks and recreation facilities in these areas, many of which are currently deficient and have little to no land readily available for acquisition and/or leisure 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. This is quite common among jurisdictions that are experiencing significant population growth.

Table 3-2 indicates that Gwinnett County's median age increased from 30.5 years to 32.5 years between 1990 and 2000. Significant population increases have been experienced in all age categories during the 1990s, with those age 45 and over more than doubling in population (112% increase). In contrast, the 0 to 17 year age cohort increased by 68%, while the 18 to 44 age group grew by 48%. This demographic profile indicates that there is 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 groups.

Table 3-2: Gwinnett County Population by Age (1990-2000)

	1990		2000		Change (1990-2000)	
Under 5 years	30,491	8.6%	47,075	8.0%	16,584	54.4%
5 to 17 years	68,223	19.3%	118,918	20.2%	50,695	74.3%
18 to 24 years	34,050	9.6%	51,004	8.7%	16,954	49.8%
25 to 44 years	149,075	42.2%	220,407	37.5%	71,332	47.8%
45 to 54 years	35,915	10.2%	81,237	13.8%	45,322	126.2%
55 to 64 years	18,380	5.2%	38,208	6.5%	19,828	107.9%
65 years and over	16,776	4.8%	31,599	5.4%	14,823	88.4%
Total	352,910	100.0%	588,448	100.0%	272,320	67.2%
Median Age	30.5 years		32.5 years			

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 steady growth in the younger age cohorts. Figure 3-3 illustrates the population forecast by specific age groups for the period of 2000 to 2030 (note: this 30-year time period has been shown in order to highlight the significant increases in the 55-plus age group).

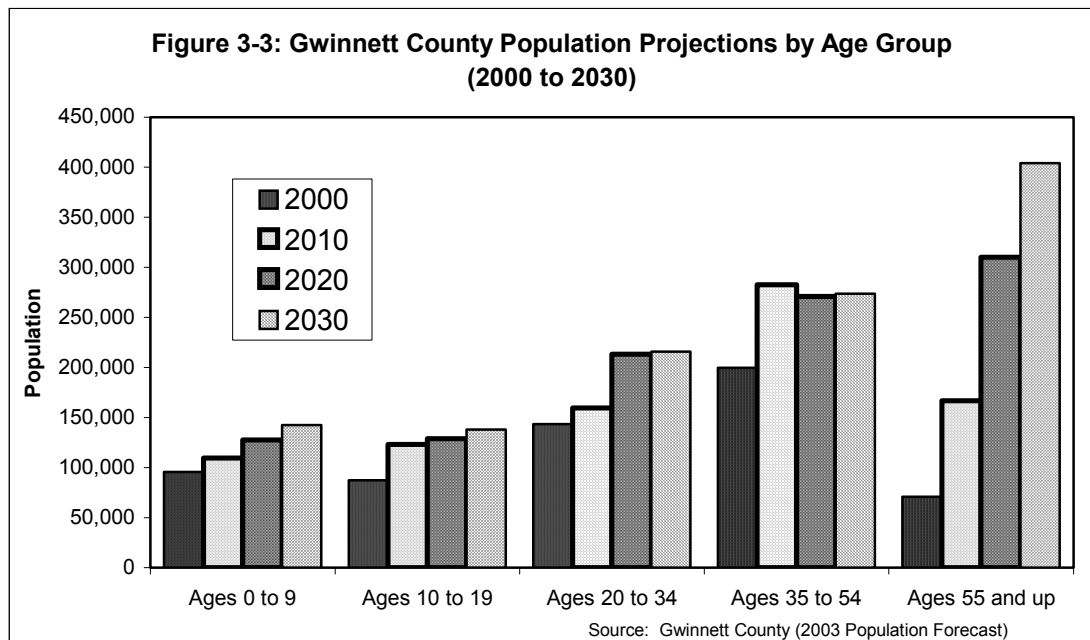


Figure 3-4 illustrates the age composition of each recreation planning area for the year 2000. Currently, Areas C and E have the greatest proportion of children and teens (32.6% and 32.4% respectively), while Area E has the greatest percentage of persons age 55 and over (14.1%).

Maps 3-2 to 3-6 show age-specific population densities by Census tract.



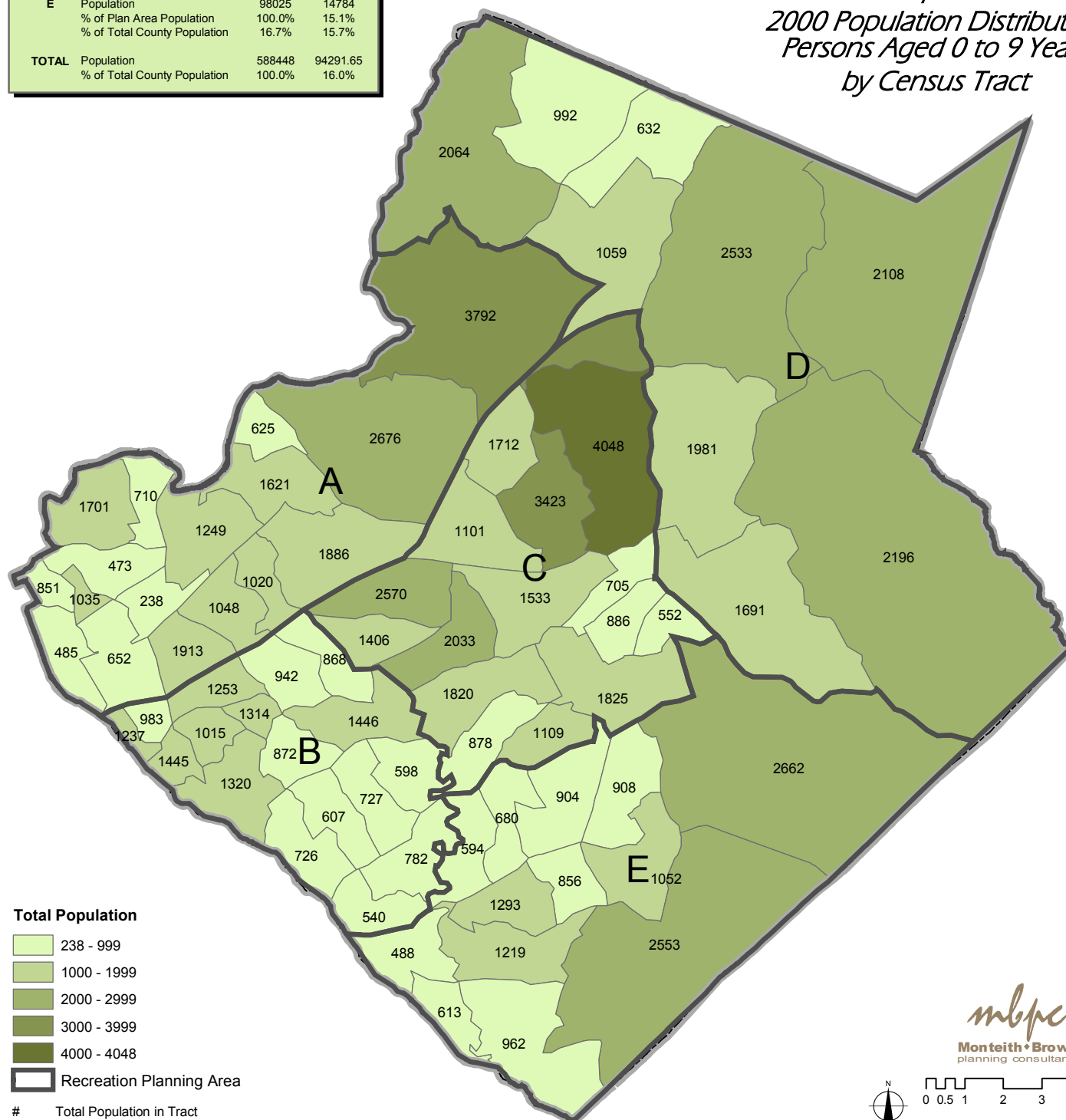
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Map 3-2 2000 Population Distribution Persons Aged 0 to 9 Years by Census Tract

POPULATION DISTRIBUTION BY RECREATION PLANNING AREA

Planning Area		Total Population	0 to 9 Years
A	Population	136028	21463
	% of Plan Area Population	100.0%	15.8%
	% of Total County Population	23.1%	22.8%
B	Population	114069	16675
	% of Plan Area Population	100.0%	14.6%
	% of Total County Population	19.4%	17.7%
C	Population	150202	26113
	% of Plan Area Population	100.0%	17.4%
	% of Total County Population	25.5%	27.7%
D	Population	90124	15256
	% of Plan Area Population	100.0%	16.9%
	% of Total County Population	15.3%	16.2%
E	Population	98025	14784
	% of Plan Area Population	100.0%	15.1%
	% of Total County Population	16.7%	15.7%
TOTAL	Population	588448	94291.65
	% of Total County Population	100.0%	16.0%



**POPULATION DISTRIBUTION
BY RECREATION PLANNING AREA**

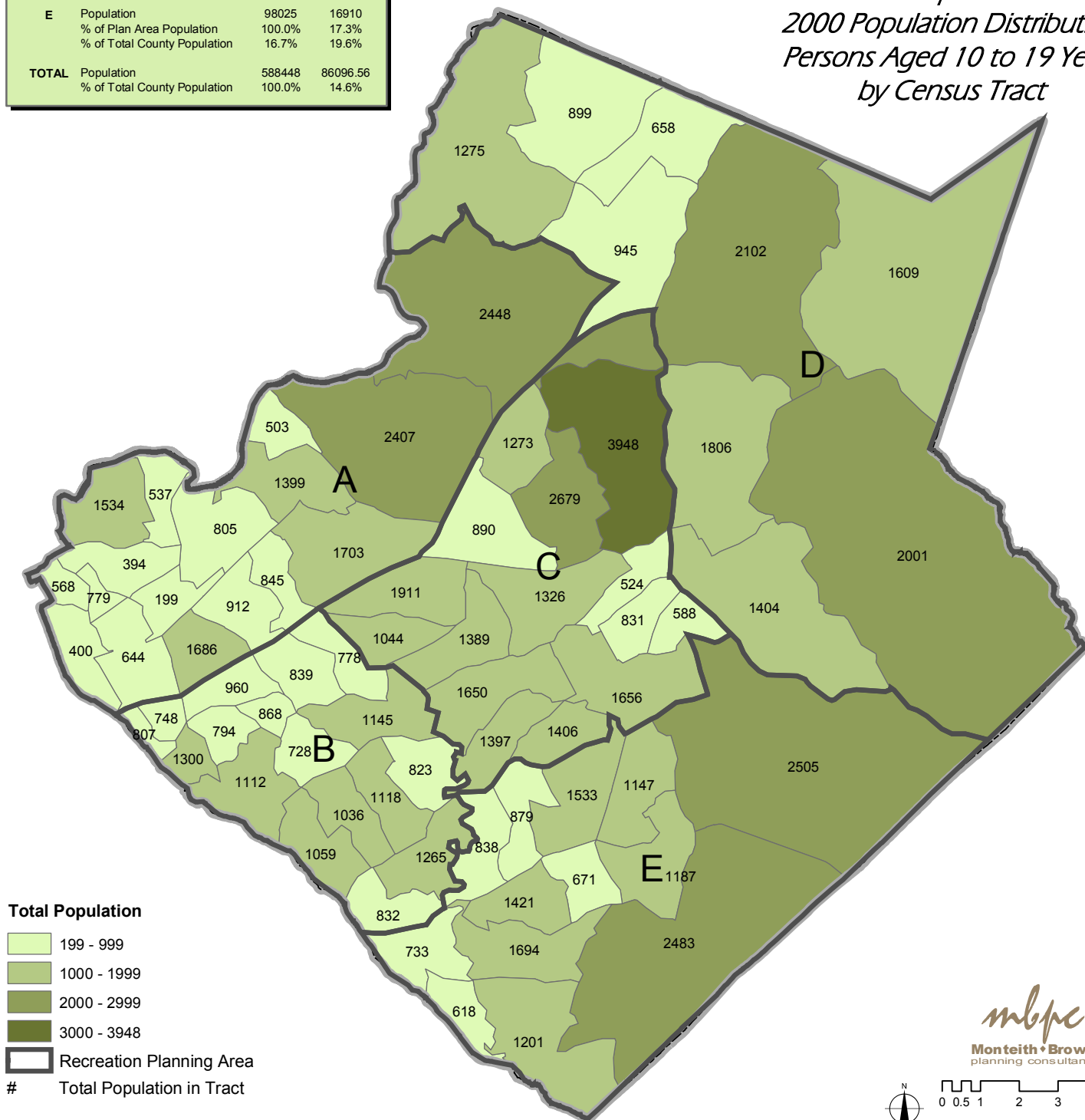
Planning Area		Total Population	10 to 19 Years
A	Population	136028	17432
	% of Plan Area Population	100.0%	12.8%
	% of Total County Population	23.1%	20.2%
B	Population	114069	16212
	% of Plan Area Population	100.0%	14.2%
	% of Total County Population	19.4%	18.8%
C	Population	150202	22843
	% of Plan Area Population	100.0%	15.2%
	% of Total County Population	25.5%	26.5%
D	Population	90124	12699
	% of Plan Area Population	100.0%	14.1%
	% of Total County Population	15.3%	14.7%
E	Population	98025	16910
	% of Plan Area Population	100.0%	17.3%
	% of Total County Population	16.7%	19.6%
TOTAL	Population	588448	86096.56
	% of Total County Population	100.0%	14.6%



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*Map 3-3
2000 Population Distribution
Persons Aged 10 to 19 Years
by Census Tract*



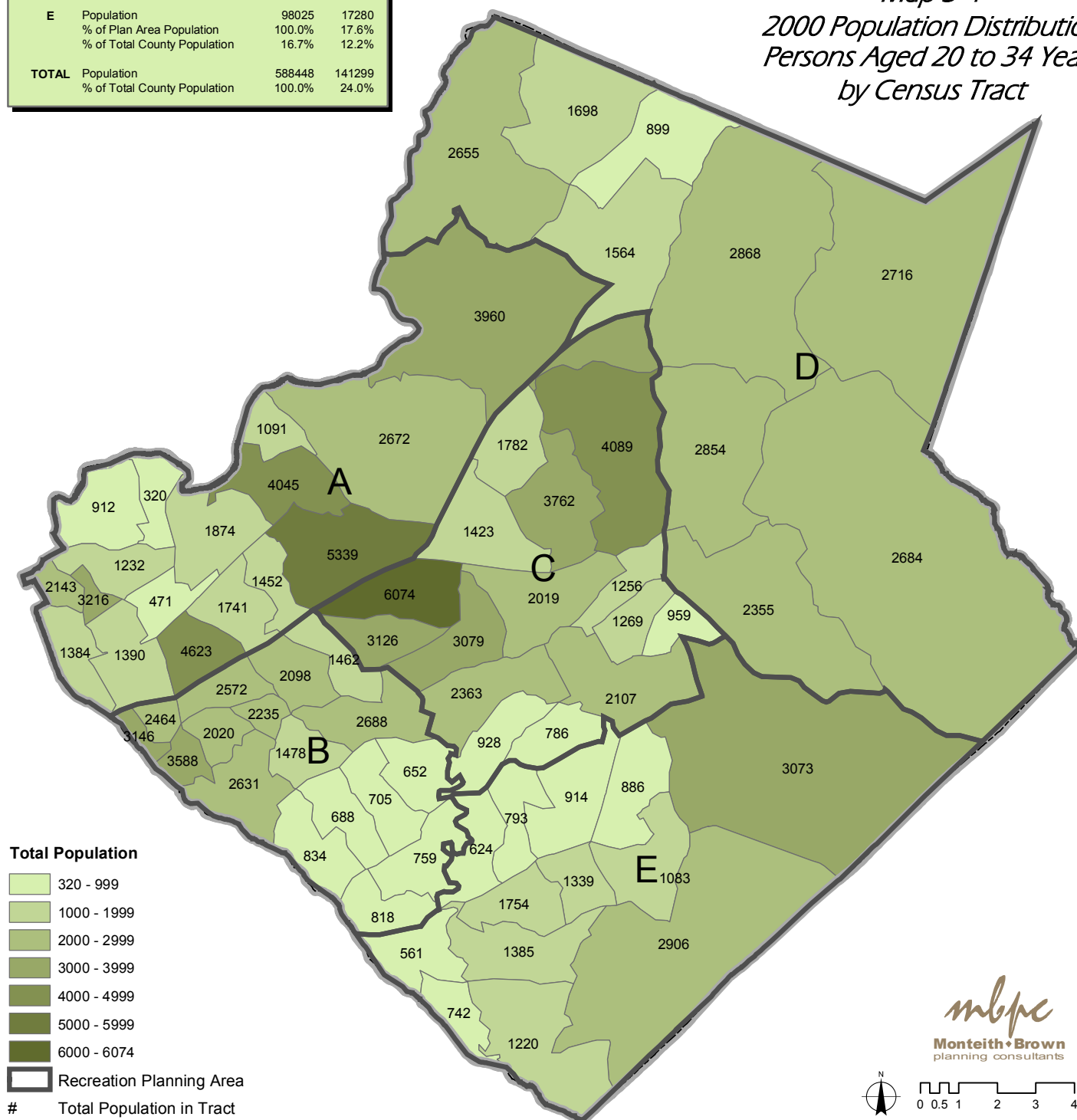


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Map 3-4 2000 Population Distribution Persons Aged 20 to 34 Years by Census Tract

Planning Area		Total Population	20 to 34 Years
A	Population	136028	37330
	% of Plan Area Population	100.0%	27.4%
	% of Total County Population	23.1%	26.4%
B	Population	114069	30838
	% of Plan Area Population	100.0%	27.0%
	% of Total County Population	19.4%	21.8%
C	Population	150202	35557
	% of Plan Area Population	100.0%	23.7%
	% of Total County Population	25.5%	25.2%
D	Population	90124	20293
	% of Plan Area Population	100.0%	22.5%
	% of Total County Population	15.3%	14.4%
E	Population	98025	17280
	% of Plan Area Population	100.0%	17.6%
	% of Total County Population	16.7%	12.2%
TOTAL	Population	588448	141299
	% of Total County Population	100.0%	24.0%



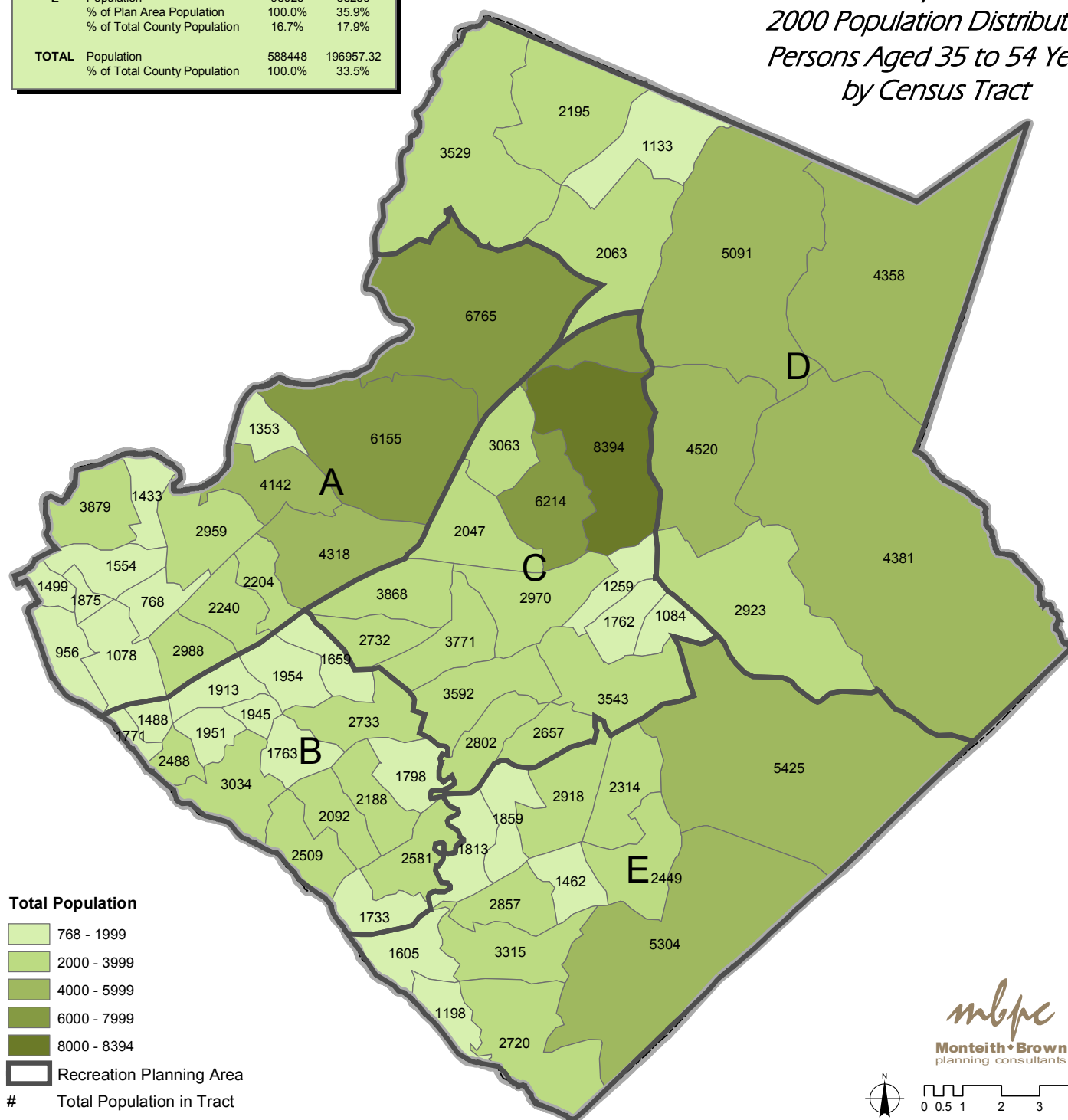


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Map 3-5 2000 Population Distribution Persons Aged 35 to 54 Years by Census Tract

Planning Area		Total Population	35 to 54 Years
A	Population	136028	45252
	% of Plan Area Population	100.0%	33.3%
	% of Total County Population	23.1%	23.0%
B	Population	114069	35600
	% of Plan Area Population	100.0%	31.2%
	% of Total County Population	19.4%	18.1%
C	Population	150202	50672
	% of Plan Area Population	100.0%	33.7%
	% of Total County Population	25.5%	25.7%
D	Population	90124	30193
	% of Plan Area Population	100.0%	33.5%
	% of Total County Population	15.3%	15.3%
E	Population	98025	35239
	% of Plan Area Population	100.0%	35.9%
	% of Total County Population	16.7%	17.9%
TOTAL	Population	588448	196957.32
	% of Total County Population	100.0%	33.5%





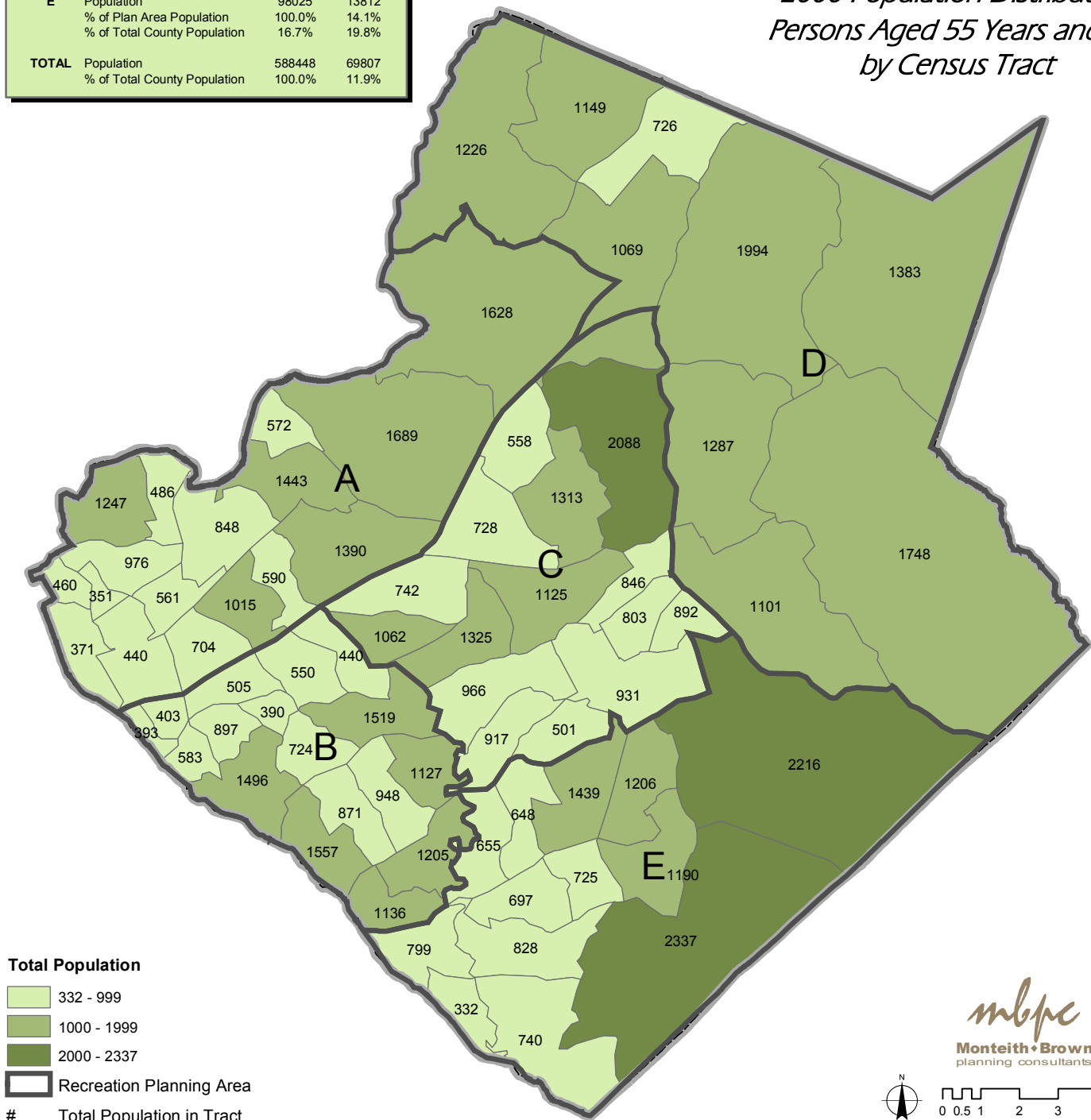
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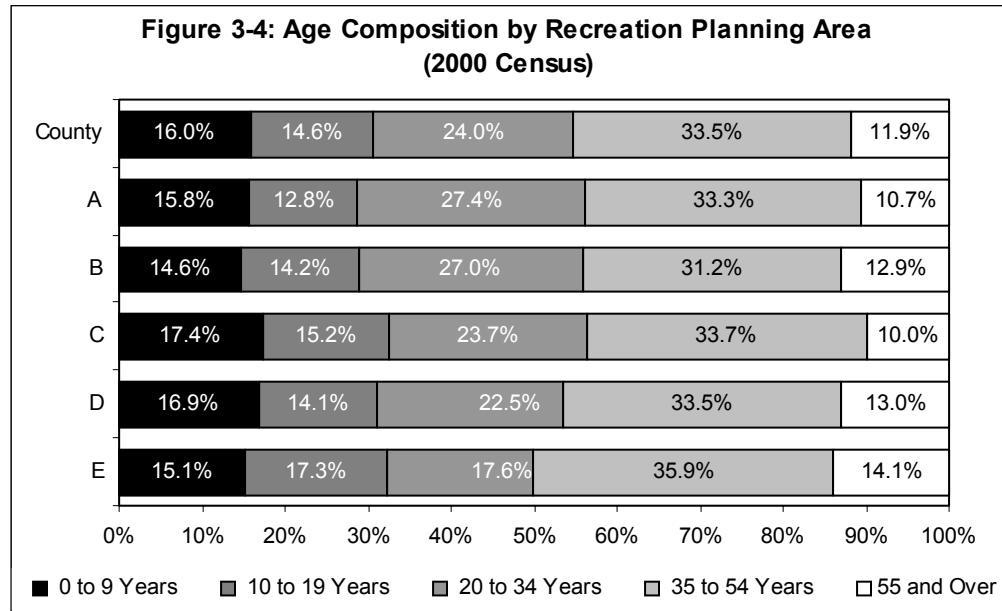
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Map 3-6
2000 Population Distribution
Persons Aged 55 Years and Up
by Census Tract

POPULATION DISTRIBUTION BY RECREATION PLANNING AREA

Planning Area		Total Population	55 and Over
A	Population	136028	14551
	% of Plan Area Population	100.0%	10.7%
	% of Total County Population	23.1%	20.8%
B	Population	114069	14744
	% of Plan Area Population	100.0%	12.9%
	% of Total County Population	19.4%	21.1%
C	Population	150202	15017
	% of Plan Area Population	100.0%	10.0%
	% of Total County Population	25.5%	21.5%
D	Population	90124	11683
	% of Plan Area Population	100.0%	13.0%
	% of Total County Population	15.3%	16.7%
E	Population	98025	13812
	% of Plan Area Population	100.0%	14.1%
	% of Total County Population	16.7%	19.8%
TOTAL	Population	588448	69807
	% of Total County Population	100.0%	11.9%





Note: Population forecasts by age cohorts are only available in 5-year increments. Since the immediate term of this Master Plan is 2004 to 2009, the forecast years of 2000 and 2010 will be the focus of this analysis. Projections by age group are not currently available by geographic area or recreation planning area.

Table 3-3 contains the population forecasts by age group for the 10-year period of 2000 to 2010.

Table 3-3: Projected Growth Rates by Age Group (Gwinnett County, 2000 to 2010)

Age Group	Population Forecast		Change (2000 to 2010)	
	2000	2010	Growth	%
0 to 9	95,605	109,650	14,045	14.7%
10 to 19	87,297	123,197	35,900	41.1%
20 to 34	143,268	159,516	16,248	11.3%
35 to 54	199,701	282,743	83,042	41.6%
55 and up	70,781	166,830	96,049	135.7%
Total	596,652	841,936	245,284	41.1%

As indicated earlier, significant population growth is anticipated in the 55-plus age group, which is expected to increase by 136% between 2000 and 2010. More modest (but still considerable) growth is also forecasted for the 10 to 19 and 35 to 54 age groups during this same time period, while the 0 to 9 and 20 to 34 age cohorts will experience slower growth. Of note, Figure 3-3 indicates that the 55-plus age group is expected to continue experiencing rapid growth well beyond 2010, however, the size of the 35 to 54 age group will level off and actually decline slightly past 2010. Growth among the 0 to 9 and 10 to 19 age groups should remain moderate, but steady over the long-term.

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. Household composition changed very little in the 1990s, however, with only slight declines in the percentage of "traditional" households and married couples without children at home.

According to the 2002 Needs Assessment Survey, 55% of Gwinnett County's households contain no children. Coupled with a dramatic aging of the population, it is imperative that Gwinnett County re-examine its ability to meet the recreational needs of the adult and senior markets.

3.1.5 Income and Education

Gwinnett County remains an affluent community, with the mean household income level increasing from \$48,541 to \$70,206 between 1990 and 2000. 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. 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, it is anticipated that Gwinnett County will continue to experience high levels of interest and demand for leisure facilities and programming.

3.1.6 Ethnic Communities

Tremendous increases in the ethnic and racial diversity of Gwinnett County is one of the most significant trends witnessed during the 1990s and into the 21st century. While Gwinnett's total population increased by 67% between 1990 and 2000, the County's minority population increased by nearly 400%. The percentage of the County's population identifying themselves as White decreased from 90.9% to 72.7% over this span, while the Black population increased from 5.2% to 13.3%, and Asians increased from 2.9% to 7.2%. The Hispanic population (of any race) increased from 2.4% to 10.9%, although this group is historically undercounted in every census.

Figure 3-5 illustrates the various ethnic communities that are present within each Recreation Planning Area. RPAs B and A are by far the most ethnically diverse areas of the County, with both having considerable Black, Asian and Hispanic communities. Maps 3-7 to 3-10 show the population densities of the various ethnic communities by Census tract. The large concentration of these ethnic communities along the I-85 corridor is particularly evident.

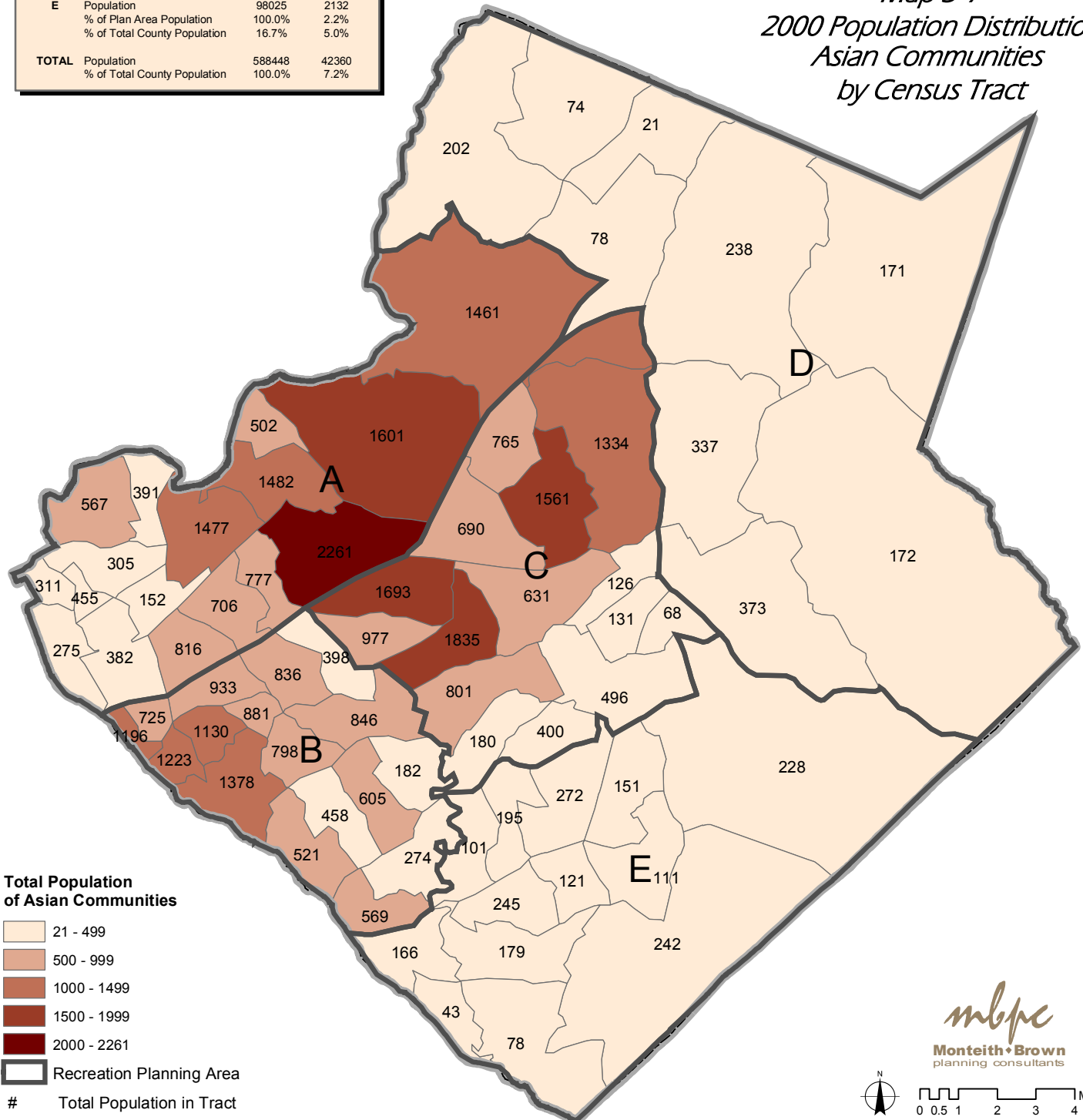


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*Map 3-7
2000 Population Distribution
Asian Communities
by Census Tract*

POPULATION DISTRIBUTION BY RECREATION PLANNING AREA			
Planning Area		Total Population	Asian Population
A	Population	136028	13724
	% of Plan Area Population	100.0%	10.1%
	% of Total County Population	23.1%	32.4%
B	Population	114069	12953
	% of Plan Area Population	100.0%	11.4%
	% of Total County Population	19.4%	30.6%
C	Population	150202	11885
	% of Plan Area Population	100.0%	7.9%
	% of Total County Population	25.5%	28.1%
D	Population	90124	1666
	% of Plan Area Population	100.0%	1.8%
	% of Total County Population	15.3%	3.9%
E	Population	98025	2132
	% of Plan Area Population	100.0%	2.2%
	% of Total County Population	16.7%	5.0%
TOTAL	Population	588448	42360
	% of Total County Population	100.0%	7.2%





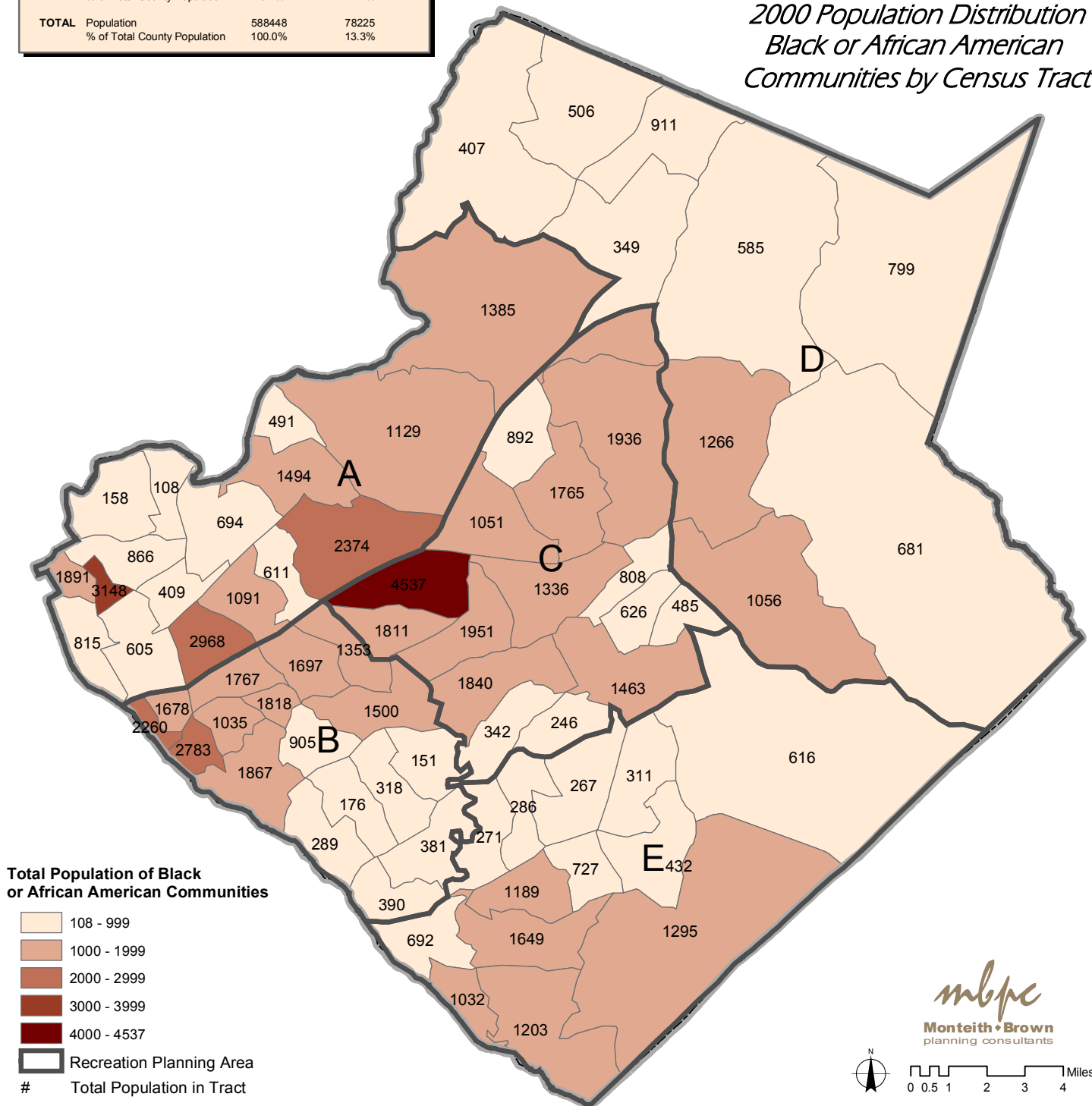
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Map 3-8
*2000 Population Distribution
Black or African American
Communities by Census Tract*

POPULATION DISTRIBUTION BY RECREATION PLANNING AREA

Planning Area		Total Population	Black or African American Population
A	Population	136028	20050
	% of Plan Area Population	100.0%	14.7%
	% of Total County Population	23.1%	25.6%
B	Population	114069	20368
	% of Plan Area Population	100.0%	17.9%
	% of Total County Population	19.4%	26.0%
C	Population	150202	21276
	% of Plan Area Population	100.0%	14.2%
	% of Total County Population	25.5%	27.2%
D	Population	90124	6560
	% of Plan Area Population	100.0%	7.3%
	% of Total County Population	15.3%	8.4%
E	Population	98025	9970
	% of Plan Area Population	100.0%	10.2%
	% of Total County Population	16.7%	12.7%
TOTAL	Population	588448	78225
	% of Total County Population	100.0%	13.3%



**POPULATION DISTRIBUTION
BY RECREATION PLANNING AREA**

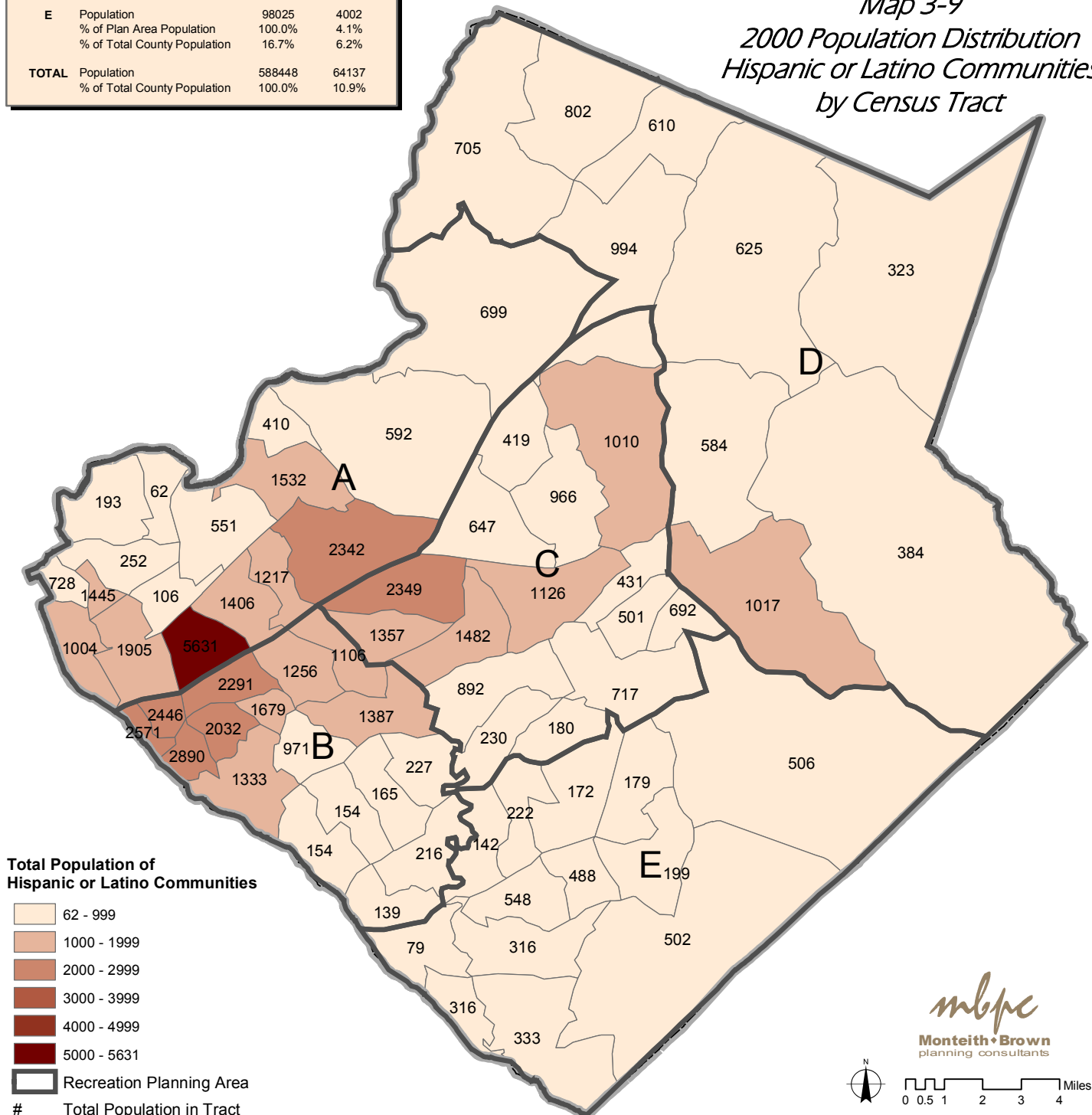
Planning Area		Total Population	Hispanic Latino Population
A	Population	136028	19981
	% of Plan Area Population	100.0%	14.7%
	% of Total County Population	23.1%	31.2%
B	Population	114069	21017
	% of Plan Area Population	100.0%	18.4%
	% of Total County Population	19.4%	32.8%
C	Population	150202	13093
	% of Plan Area Population	100.0%	8.7%
	% of Total County Population	25.5%	20.4%
D	Population	90124	6044
	% of Plan Area Population	100.0%	6.7%
	% of Total County Population	15.3%	9.4%
E	Population	98025	4002
	% of Plan Area Population	100.0%	4.1%
	% of Total County Population	16.7%	6.2%
TOTAL	Population	588448	64137
	% of Total County Population	100.0%	10.9%



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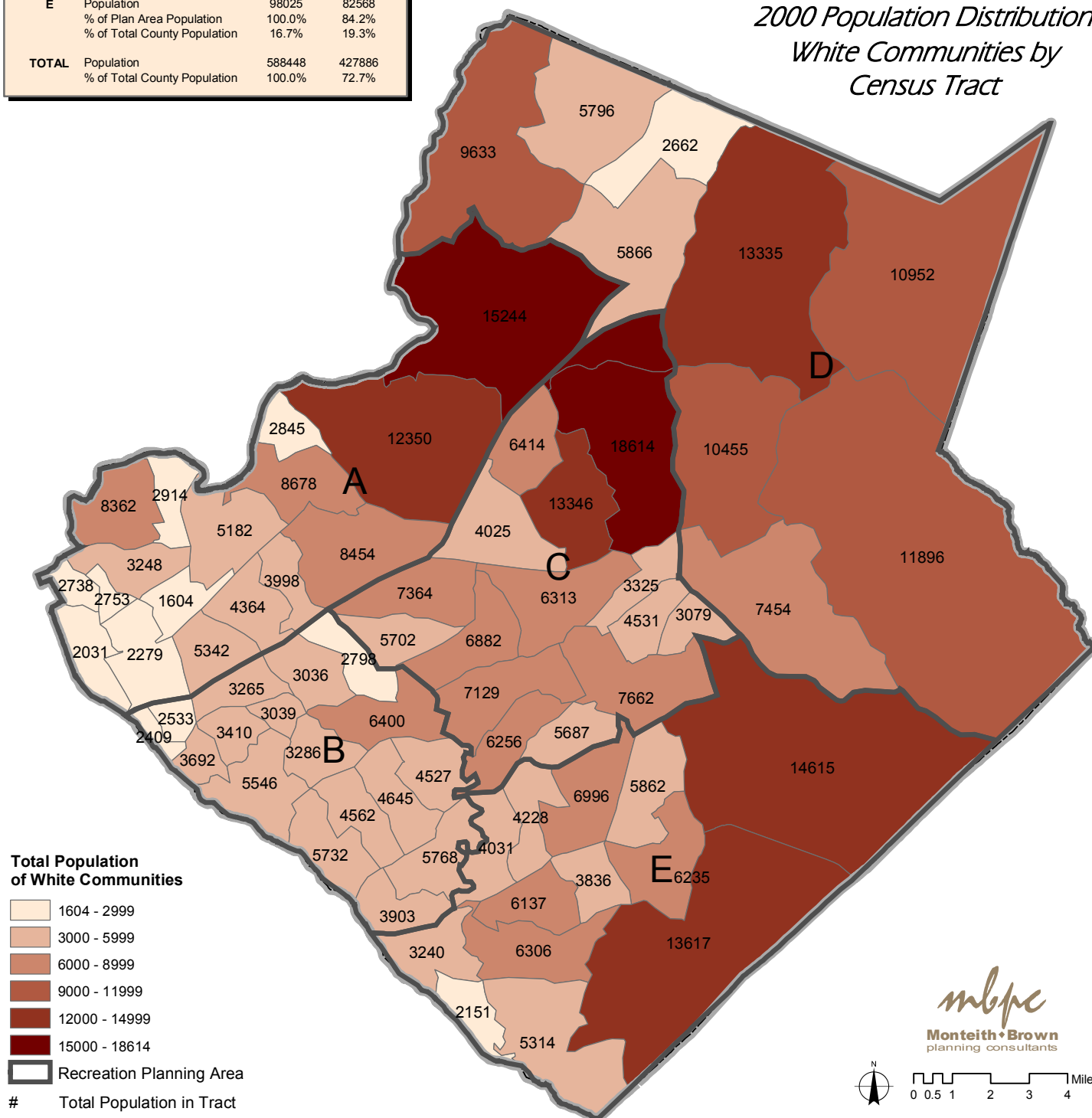
*Map 3-9
2000 Population Distribution
Hispanic or Latino Communities
by Census Tract*

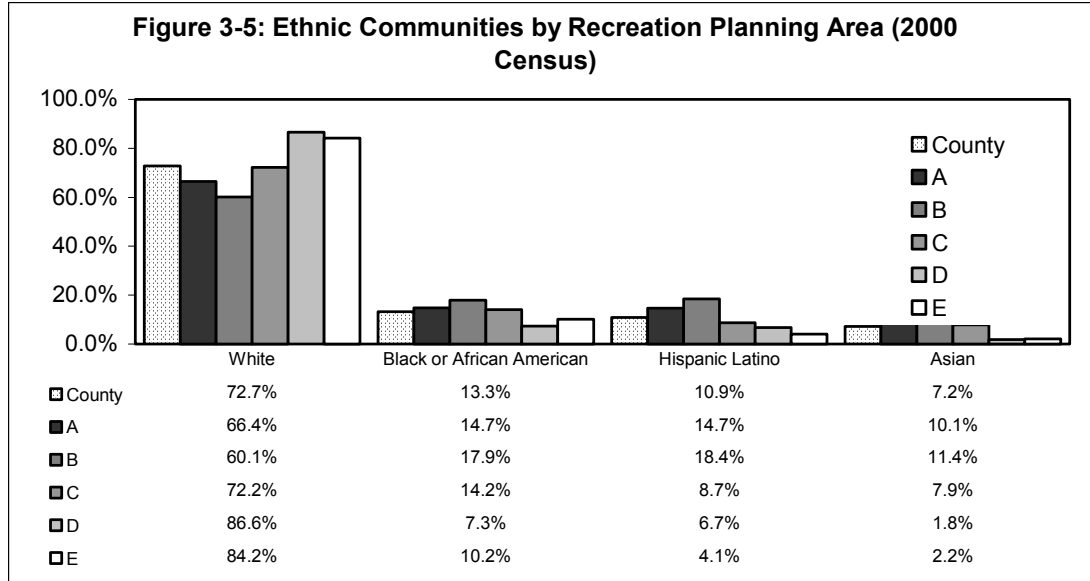


Planning Area		Total Population	White Population
A	Population	136028	90327
	% of Plan Area Population	100.0%	66.4%
	% of Total County Population	23.1%	21.1%
B	Population	114069	68551
	% of Plan Area Population	100.0%	60.1%
	% of Total County Population	19.4%	16.0%
C	Population	150202	108388
	% of Plan Area Population	100.0%	72.2%
	% of Total County Population	25.5%	25.3%
D	Population	90124	78049
	% of Plan Area Population	100.0%	86.6%
	% of Total County Population	15.3%	18.2%
E	Population	98025	82568
	% of Plan Area Population	100.0%	84.2%
	% of Total County Population	16.7%	19.3%
TOTAL	Population	588448	427886
	% of Total County Population	100.0%	72.7%



Map 3-10
2000 Population Distribution
White Communities by
Census Tract





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 facilities and programming. 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 Master Plan of the major trends and influences that will affect the programs, services and facilities that need to be provided for residents.

**3.2.1 Leisure
Trends –
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 than previous generations indicates that there will be a growing need to consider older adults in recreation facility planning. Trends research indicates that the new senior citizen is maintaining many of the exercise and fitness habits of their youth, although at a gentler pace.

Relative to national trends, Gwinnett County has a significantly more youthful demographic profile. While Gwinnett may not be aging at the same rate as some other communities, the needs of adults and seniors will continue to be an important aspect of recreation and facility planning. In 2002, 55% of the households in Gwinnett County contained no children. In Gwinnett, the percentage of total households with children under the age of eighteen has remained relatively constant between 1990 (44%) and 2000 (45%)¹. Long term predictions for Gwinnett anticipate that the County will continue to maintain its younger profile as older residents move out when they reach retirement age.

From a recreation facility and programming perspective, Gwinnett County will have to plan for the needs of a significant number of young households with children as well as adults. Those 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.

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 2000² 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 2000 was \$70,206, significantly above the mean household incomes of Georgia and the United States (\$56,625 and \$56,604 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

¹ Gwinnett County Parks and Recreation 2002 Needs Assessment Survey, A.L. Burruss Institute of Public Service, Kennesaw State University, Kennesaw, Georgia, April 2003

² 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/>

households should be addressed in the Master Plan; specifically policies with respect to subsidies and aspects of recreational programming such as 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). Linkages of multi-purpose trails into communities have yet to be fully achieved. This is an issue that is addressed in some depth in the Open Space and Greenway Master Plan. To the extent that is possible, the Master Plan should also be supportive of park planning policies and improvements that work to reduce physical barriers which impede access to county parks.

Increased Racial and Ethnic Diversity

The American demographic profile is becoming more racially and ethnically diverse. This trend is also present in Gwinnett County. For example, 2000 Census data indicates an increase in the percentage of Hispanic, Asian, and African-American residents in Gwinnett. 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.

Work and Leisure Patterns

Lack of time is one of the main factors 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 increased by 6 minutes to 32.2 minutes between 1990 and 2000). This impacts directly on recreational providers by 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.

The time crunch also affects children and, as children have traditionally been the major target group of recreation providers, this is a significant issue for any recreation department. 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 under³. 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. What does this mean to Gwinnett County? Given the pressures of school, homework and housework (believe it or not, kids are spending more time doing housework!), programs and facilities must be convenient and accessible for children as well as adults.

Americans have been taking shorter vacations and are staying closer to home, a trend first observed by the Outdoor Recreation Industry Association in 1997⁴. This is a trend that continued in 2003 for reasons attributed to U.S. economic factors and the Iraq war⁵. Sport and recreation facilities that serve as entertainment venues are gaining ground as a result. In Gwinnett, facilities and venues such as the Gwinnett Civic and Cultural Center/Arena and Lake Lanier Islands are ideally suited to capitalize on this trend.

Cyclical Nature of Sport and Leisure Participation

What's in? What's out? Events and individuals play a role in the popularity of sport. Basketball's growth in the 90s has been attributed to the popularity of Michael Jordan and the promotional and marketing efforts of the NBA. 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.

A fairly recent trend is non-motorized scooter riding (in Gwinnett County parks, only non-motorized scooters are permitted). Introduced (or re-introduced) in the late nineties, the latest Superstudy of Sport Participation

³ 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>

⁴ Sporting Goods Manufacturing Association and the Outdoor Industry Association, Trends Impacting Outdoor Recreation, 1997,

http://www.outdoorindustry.org/market_research_articles/97soi/trends.htm

⁵ The Christian Science Monitor, Summer Travel Survey, May 27, 2003 edition, <http://www.csmonitor.com/2003/0527/p13s02-wmcn.html>

(2003 edition)⁶, reveals that it is the 5th most popular activity for children over the age of six.

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 on the decline.

3.2.2 Leisure Trends – Participation

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 (1999-2002)

Type of Activity	Percent of 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

⁶ 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>

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1960) has shown an increase in the proportion of Americans who are participating in outdoor activities. Looking at the activities that have grown the slowest, this list includes outdoor team sports (which have risen by only 10.6% between 1982 and 2000), compared to substantial growth in bird watching (235.9%) and walking (91.2%)⁷.

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 development⁸. 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 outdoors⁹. When it comes to trail, street and road activities, bicycling is second to walking according to this study.

Of the top five most popular sports in the USA in 2001 according to the Superstudy of Sports Participation (2002 edition), recreational walking (84.2 million participants) was ranked second, surpassed only by recreational swimming (93.6 million participants). While there is a difference in ranking between the NSRE studies and the Superstudy reports, walking is clearly a favored activity. As previously noted, recreational walking, bicycling and recreational swimming were not included in the most recent (2003 edition) Superstudy report. Table 3-5 shows the relative ranking of sports that use trails and linkages for the years 2000, 2001 and 2002 using data drawn from the Superstudy of Sports Participation for those years. 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.

⁷ 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>

⁸ Gwinnett County Parks and Recreation 2002 Needs Assessment Survey, The A.L. Burruss Institute of Public Service, Kennesaw State University, Kennesaw, Georgia

⁹ 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>

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

Sports Activity	Rank in 2000	Rank in 2001	Rank in 2002
Recreational Walking	2	2	n.a.
Recreational Bicycling	4	4	n.a.
Day Hiking	9	12	8
Fitness Walking	13	13	7
Running/Jogging	14	14	10
In-Line Skating	16	18	18
Horseback Riding	27	28	28
Scooters (non-motorized)	n/a	29	n.a.

Note: Ranks are based on those 5 years of age or older, participating at least once
Source: Sporting Goods Manufacturing Association, Press Release. "Sports and Activities which Dominate U.S. Participation", April 4th 2002 and "Top 30 Participation Activities in the U.S.", April 9, 2003, <http://www.sgma.com/press/2003/press1049911418-10230.html> and http://www.goodnewsforsports.com/NewsRelease/current/0502_ActivitiesDominate.htm

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%)

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 nationally, local jurisdictions play an important role in providing facilities for youth sports.¹⁰ 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.

¹⁰ National Council of Youth Sports, Report on Trends and Participation in Organized Youth Sports (2001 edition); <http://www.ncys.org>

Health and Fitness Levels

One in four adults engage in little or no regular physical activity according to the 2000 National Health Interview Study¹¹. As noted previously, education and income are positive predictors for higher levels of activity, which suggests that Gwinnett residents are likely to exceed this national average.

Levels of “frequent fitness participation” (defined as participation in one or more individual physical activities on 100 or more occasions annually) have been essentially stagnant since 1990. In 1990, 51.5 million Americans were frequent fitness participants. In 1999, this level had declined to 50.4 million.¹²

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”¹³.

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 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 the Master Plan process. Note: only 14% of

¹¹ “Physical Activity among Adults: United States 2000”, U.S. Department of Health and Human Services, Center for Disease Control and Prevention; <http://www.cdc.gov/nchs>

¹² Sporting Goods Manufacturing Association, Press Release, “Booming Health Clubs, Slipping Fitness Participation and Healthier Diets All Coexist in Overweight Society”; http://www.americansportsdata.com/pr_08-28-00.asp

¹³ Presidents Council on Physical Fitness and Sports Fact Sheet, http://www.fitness.gov/physical_activity_fact_sheet.html

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 citizen 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 computer centers 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;
- life long learning / interest in short courses/workshops; and
- The shortage of time factor will continue into retirement; evening and weekend time slots will be used by this age group more than previous senior citizens.¹⁴

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.

¹⁴ 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

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 doesn’t 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 group¹⁵. 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)¹⁶.

Looking to the future, Gwinnett can anticipate increased numbers of girls and women participating in sports and recreation.

3.2.3 Leisure Trends - Team Sports

General

The Annual Superstudy of Sports Participation (2002 edition) identified that the largest gains in sport participation between 1998 and 2001 were in wakeboarding, artificial wall climbing, paintball and snowboarding. The largest number of active participants, however, are 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.¹⁷ 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.

¹⁵ National Council of Youth Sports, Report on Trends and Participation in Organized Youth Sports (2001 edition); <http://www.ncys.org>

¹⁶ Sporting Goods Manufacturers Association, Press Release, “New Survey: 54% of U.S. Youngsters Play Organized Sport”; <http://www.sgma.com>

¹⁷ 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

Table 3-6 shows that participation levels in team sports declined between 1998 and 2001 for all major team sports except soccer and fast pitch softball. The single most popular sport team sport for all ages is basketball. Lacrosse (not classified as a major team sport due to lower participation numbers), has also grown (see also sub-section on lacrosse). A decline in participation in pick-up games is one of the major factors that industry experts attribute to the decline in team sports.

Table 3-6: Participation Levels in “Traditional” Sports (participated at least once in last 12 months)

Team Sport	Participants, 2001 (thousands)	3-year change (1998-2001)	14-year change (1987-2001)
Softball (fast pitch)	4,117	11%	n.a
Soccer	19,042	5%	24%
Football (touch)	16,675	-4%	-18%
Softball (total)	20,123	-6%	-35%
Baseball	11,405	-7%	-25%
Basketball	38,663	-9%	8%
Volleyball	24,123	-9%	-33%

Source: Sporting Goods Association of America, Press Release “Growth of New Millennial Pursuits Outpaces Traditional Activities”, August 1, 2002, <http://www.americansportsdata.com/pr-08-01-02-3.asp>.

Youth Sport Participation

Basketball and soccer are the most popular team sports (refer to Table 3-7).

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

A distinction is made between “Sport” and “Organized (Team) Sport” by SGMA. 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

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were team sports, the most popular being basketball (see Table 3-8). In-line skating, non-motorized scooter riding, skateboarding and fishing are some of the more popular individual sports or activities for American youth.

Table 3-8: Most Popular Sports (individual and team) for Youth (age 6+) in 2002

Rank	Sport	Total Participants (millions)
1	Basketball	10.1
2	Soccer	6.1
3	In-line skating	4.9
4	Baseball	4.0
5	Scooter riding (non-motorized)	3.6
6	Calisthenics	3.2
7	Running/jogging	3.1
8	Skateboarding	2.9
9	Freshwater fishing	2.9
10	Stretching	2.6
11	Court Volleyball	2.4
12	Touch Football	2.4
13	Slow-Pitch Softball	2.0
14	Billiards/Pool	1.9
15	Tent Camping	1.6

Source: Sporting Goods Association of America, Press Release, Excerpt from the Superstudy of Sports Participation - Frequent Sport Participant, 2003 edition, "Children's Sports Interests Run the Gamut", May 30, 2003; <http://sgma.com/press/2003/press1054214405-13555.html>

Generally, Gwinnett children and teens mirror the sport and recreational pursuits identified in national trend surveys. There are some differences; swimming for children under and over 13 is more highly favored in Gwinnett and bicycling was identified as a preferred activity. Perhaps both can be attributed to the quality of Gwinnett's bicycle trails and the high "fun quotient" at the family aquatic centers. Table 3-9 provides a summary of the favored activities by Gwinnett County children and teenagers.

Table 3-9: 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.¹⁸

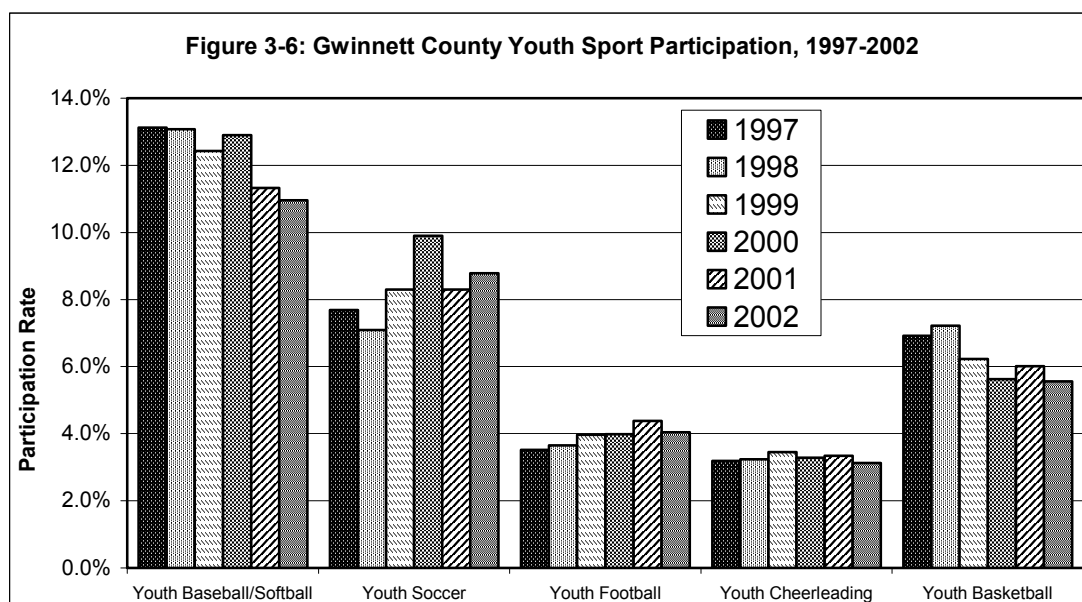
Soccer

After years of tremendous growth, soccer participation may have peaked. Reported data from the 2003 Superstudy of Sports Participation (2002 participation data) shows a decline in soccer participation from 2001, both in terms of frequent participants and those who played at least once during the year. 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 slight 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.

Figure 3-6 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.

¹⁸ 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.daconline.net/press_release's.htm



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 bracket¹⁹. 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.

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 has been growing for a number of years. Recent reports indicate that approximately 62% of fastpitch players are women.²⁰ In absolute terms, 2001 baseball participation numbers are 28% below 1987 levels. When population

¹⁹ Sporting Goods Manufacturing Association, Press Release, "Soccer, Not just for Children", June 9, 2003, <http://www.sgma.com/press/2003/press1055170659-6754.html>

²⁰ Sporting Goods Manufacturing Association, Press Release, "Fast-Pitch Softball Becoming Popular" June 30, 2003, <http://www.sgma.com/press/2003/press1056985416-14826.html>

growth is factored out, the loss deepens to 37% according to an SGMA sponsored study, the 2001 Baseball Participation Study²¹.

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

Tackle Football experienced marginal growth between 1987 and 1997 according to published results from an SGMA sponsored report, the Football Participation Study (2001). An increase of 15% was, however, experienced between 1999 and 2000 (of those reporting that they had played at least once).²² During the same time frame (1987 and 2000) touch football declined by 24%, a decline attributed to a general decline in pick-up sports. At the high school level, football is the number one participant sport (for boys).²³

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 a popular team sport, growth appears to be leveling off. 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 Note: Limited results published on-line from the 2001 Baseball Study. This study is derived from the 2001 Superstudy of Sports Participation.

²² Sporting Goods Manufacturing Association, excerpt from The Football (tackle) Participation Report (2001 edition), <http://www.sgma.com/reports/2001/report991756651-28430.html>

²³ National Federation of High School Association, High School Participation Rates 2001-2002, <http://www.laxpower.com/common/ParticipationRates2002.php>

3.2.4 Leisure Trends - Individual Recreation ActivitiesCheerleading

Cheerleading was ranked ninth in terms of participation numbers among organized sports for youth 6 to 17 in 2001. In Gwinnett there was a 5% increase in participants between 2000 and 2002, which can be attributed to overall population growth. Gwinnett's participation rate (3% of the 5-14 population) is in line with national averages.²⁴

Lacrosse

Lacrosse does not rank in the top ten team sports but it is one of the few team sports that is actually growing in America. US Lacrosse reports that participation doubled between 1999 and 2002 (to 60,000 players under 14); to put this in context, there were 10 million basketball players between the ages of 6 and 17 in 2000²⁵. Across the age spectrum there are 250,000 lacrosse players, according to US Lacrosse. At the high school level, lacrosse is also one of the fastest growing sports, although participation numbers are low compared to football and basketball.

Lacrosse does not have a strong presence in Gwinnett at this time, with no public high schools offering the sport. The sport is growing nationally, however, and additional demand in Gwinnett may be anticipated in the future.

Aquatics

Swimming activities rank in the top six most popular types of outdoor activities (12 years of age or older) in the NSRE Survey of Recreation (1999 to 2002) and, as previously noted, the 2002 Superstudy of Sports Participation, found that recreational swimming was more popular than walking²⁶.

The 2002 Superstudy of Sports Participation identified a 1% decline in swimming participation between 1998 and 2001. 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. "The Loaf Book 2: How Americans Spent Their

²⁴ 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>

²⁵ US Lacrosse, 2002 US Lacrosse Participation Survey, http://www.lacrosse.org/the_sport/index.phtml

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

Free Time Between 1990 and 2000” also identified that fewer persons are swimming²⁸.

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. Fitness swimming ranked number 29th out of 30 participation sports in 2002 in the latest reported Sports Participation Study (2003) published by SGMA.²⁹

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.

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.³⁰ Gwinnett’s family aquatic centers are very much in line with these trends.

²⁸ The Leisure Trends Group, The Loaf Book 2: Americans at Leisure; <http://www.leisuretrends.com>

²⁹ Sporting Goods Manufacturing Association, Press Release, “Top 30 Participation Activities in the U.S., April 9, 2003, <http://www.sgma.com/press/2003/press1049911418-10230.html>

³⁰ 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

Tennis

The Superstudy of Sports (2001) indicates that tennis participation has declined by 29% over the past 14 years (for those participating at least once a year)³¹. The tennis industry however, sees some evidence that this trend is correcting itself. The tennis industry has been conducting their own surveys for a number of years and their database shows some positive growth in tennis; 19.5 million players in 1996, 20.8 million in 1999 and 19.7 million in 2000 (players over the age of 12). A newly released study (March 2003) using a larger sample, indicates that there were 23.5 million Americans playing tennis in 2002. That 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 29.³²

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 2001 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 rose 14% from 1999 to 2001. Overall, however, absolute numbers of golf participants did not increase appreciably between 1990 and 2000; there were 28.9 million players in 1990 and 30.4 million in 2000, indicating that the number of golf participants did not keep pace with overall population growth nationally.³³

³¹ 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

³² 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>

³³ Sporting Goods Manufacturing Association, Press Release, "Golf: Play is Steady While Sales Struggle", Feb. 22 2002; <http://www.sportlink.com/press/2002/press1013021504-19389.html>

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, anticipates continued popularity in golf although the Foundation recorded a slight decline (1.1%) in total participants between 2001 and 2002. 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.³⁴

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 2001, in-line skating, which had been growing in popularity since 1989, began to reach saturation levels according to industry reports. In 1998, 32 million Americans had in-line skated at least once a year; in 2001, the first decline since 1989 was registered (a decline of 19% to 26 million). There was also a decline in the number of frequent participants. In-line skating, however, remains a very popular activity, second only to basketball for children over the age of six.³⁵

Skateboarding

Skateboarding is the fastest growing "extreme" sport in the U.S. registering a 54% increase in participants between 1998 and 2002. Three quarters of all skateboarders are male and the vast majority are under the age of 18.³⁶ 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

³⁴ National Golf Foundation and the National Golf Course Owners Association, Golf 20/20; <http://www.Golf2020.com>

³⁵ Sporting Goods Manufacturing Association, Excerpt from Trends in Inline Skating Participation Report, August, 2002, <http://www.sgma.com/press/2002/pdf/inline2002.pdf>

³⁶ Sporting Goods Manufacturing Association, Press Release, "Skating- Riding a Wave of Popularity", July 2 ,2003, <http://www.sportlink.com/press/2003/press1056987137-26038.html>

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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.