

Appendix B Market Report & Trends

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SWTDESIGN



Market Report



Section I – Demographic Analysis

Ballard*King & Associates (B*K) as part of a larger project team has been hired by the City of Brentwood, Missouri to complete a parks and recreation master plan. The first step to complete this scope of work is to determine service areas for analysis and recreation/leisure activities.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2020 Census data and their demographers for 2023-2028 projections. In addition to demographics, ESRI also provides data on housing, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

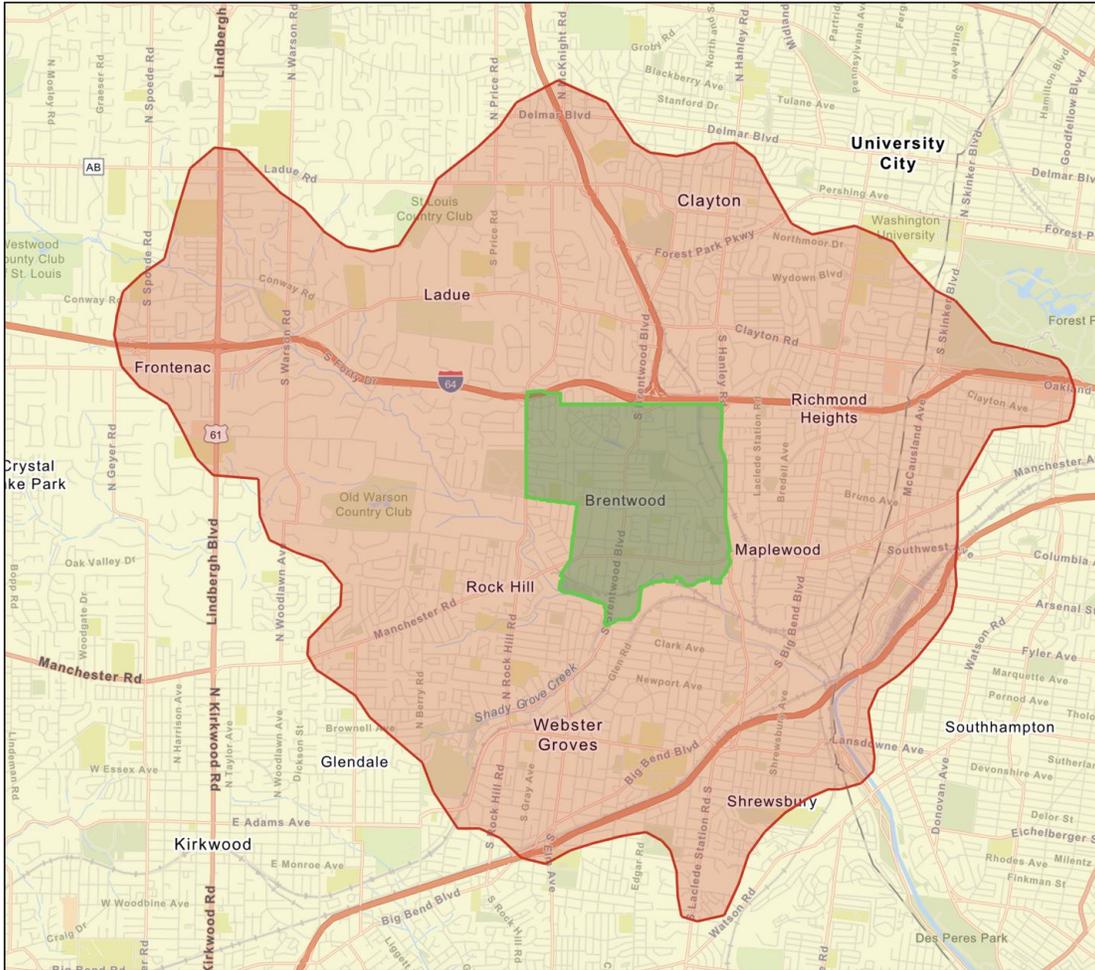
Service Areas: The information provided includes the basic demographics and data for the Primary and Secondary Service Areas with comparison data for the State of Missouri and the United States. The Primary Service Area has been identified as the City of Brentwood, with the Secondary Service Area being an approximate 5-minute drive-time beyond the City boundaries.

Primary Service Areas are defined as the distance people will travel on a regular basis (a minimum of once a week) to utilize recreation facilities. Use by individuals outside of this area will be much more limited and will focus more on special activities or events.

Service areas can flex or contract based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can influence participation, membership, daily admissions and the associated penetration rates for programs and services.

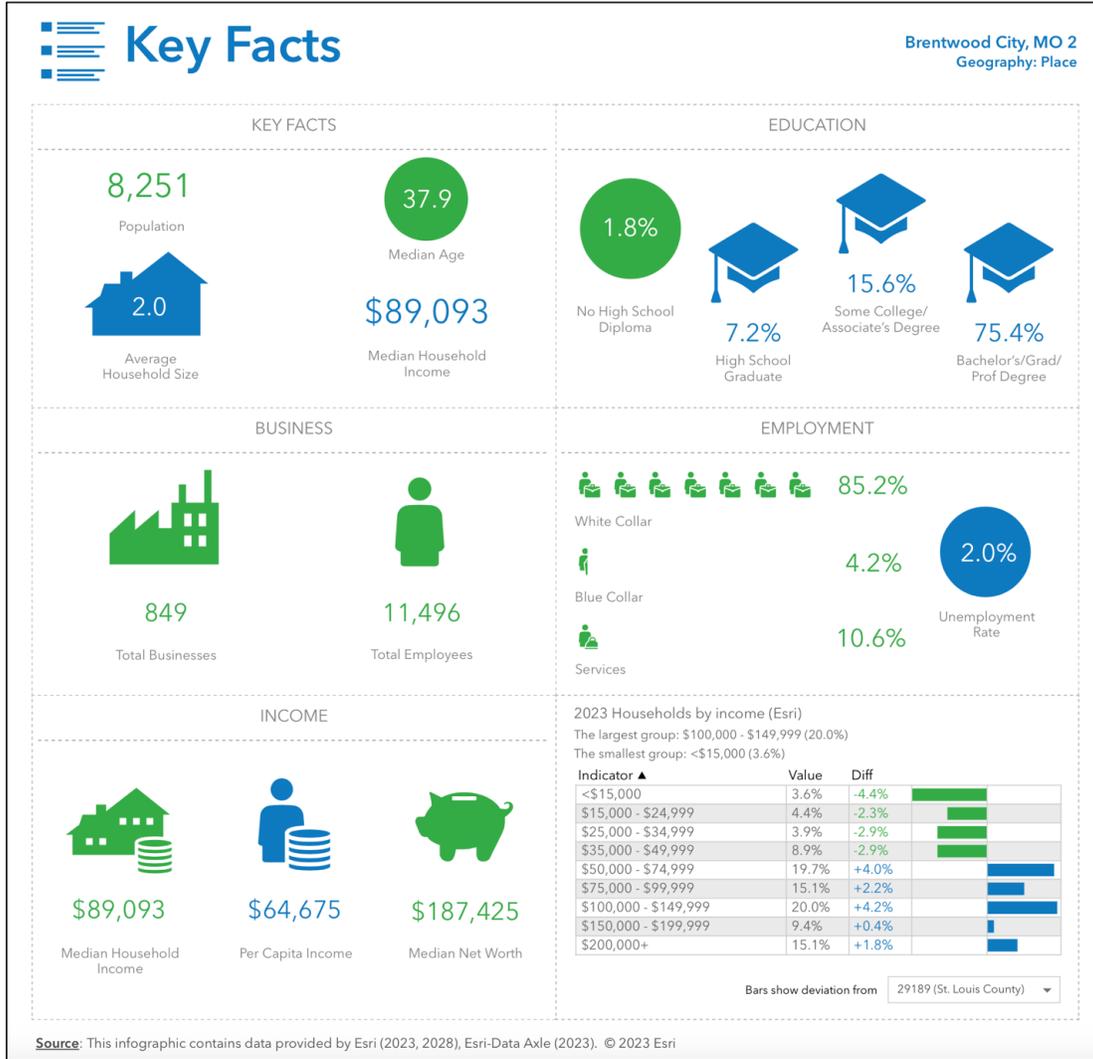
Service areas can vary in size with the types of components in the facility.

Service Area Map



- Green Filled Boundary – Primary Service Area (Brentwood, MO)
- Red Filled Boundary – Secondary Service Area (5-Minute Drive)

Infographic



- Households by Income comparison uses the Primary Service Area and compares it to St. Louis County.

Demographic Summary

	Primary Service Area (City of Brentwood)	Secondary Service Area (5-min Drive Radius)
Population:		
2020 Census	8,233 ¹	93,808 ²
2023 Estimate	8,251	92,805
2028 Estimate	8,211	93,501
Households:		
2020 Census	4,152	41,575
2023 Estimate	4,164	41,631
2028 Estimate	4,172	42,491
Families:		
2020 Census	1,824	21,674
2023 Estimate	1,740	20,832
2028 Estimate	1,734	21,150
Average Household Size:		
2020 Census		
2023 Estimate	1.98	2.09
2028 Estimate	1.96	2.07
Ethnicity (2023 Estimate):		
Hispanic	3.9%	4.1%
White	80.5%	78.2%
Black	4.9%	7.6%
American Indian	0.3%	0.2%
Asian	6.5%	5.9%
Pacific Islander	0.0%	0.0%
Other	1.1%	1.2%
Multiple	6.8%	6.9%
Median Age:		
2020 Census	35.0	37.3
2023 Estimate	37.9	39.8
2028 Estimate	38.8	41.2
Median Income:		
2023 Estimate	\$89,093	\$93,380
2028 Estimate	\$102,317	\$109,283

¹ From the 2010-2020 Census, the Primary Service Area experienced a 0.3% increase in population.

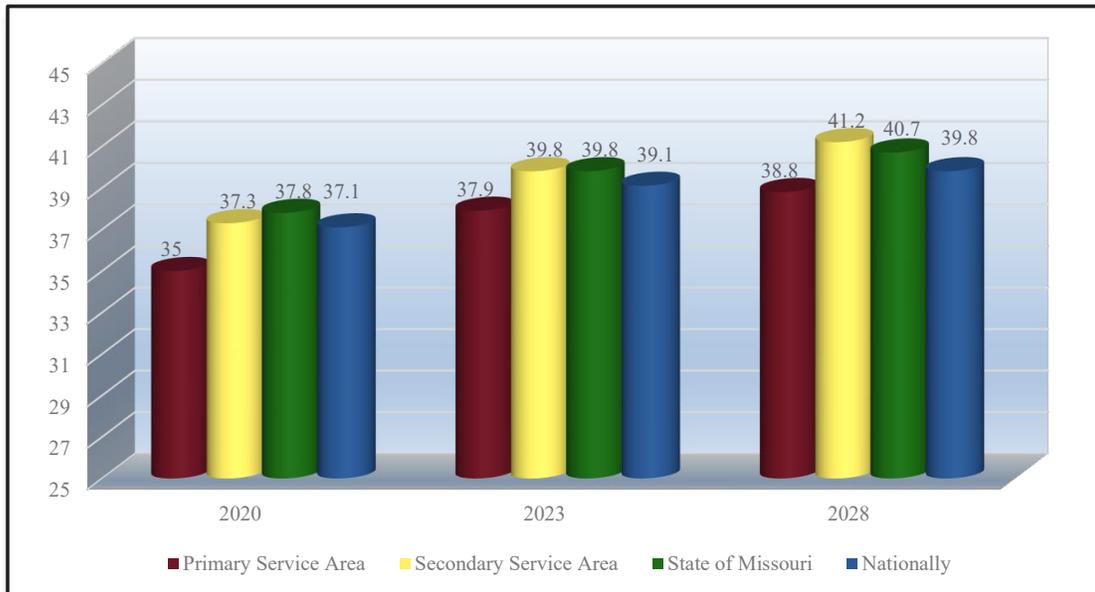
² From the 2010-2020 Census, the Secondary Service Area experienced a 0.4% increase in population.

Age and Income: The median age and household income levels are compared with the national number as both of these factors are secondary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

Table A – Median Age:

	2020 Census	2023 Projection	2028 Projection
Primary Service Area	35.0	37.9	38.8
Secondary Service Area	37.3	39.8	41.2
State of Missouri	37.8	39.8	40.7
National	37.1	39.1	39.8

Chart A – Median Age:



The median age in the Primary Service Area is slightly lower than the State of Missouri and the National number. A lower median age typically points to the presence of families with children. Parks and recreation activities, programs and events draw a large demographic but tend to be most popular with youth and their parents. Grandparents are becoming an increasing part of the household though, as they care for and are involved with their grandchildren.



The following chart provides the number of households and percentage of households in the Primary and Secondary Service Areas with children.

Table B – Households w/ Children

	Number of Households w/ Children	Percentage of Households w/ Children
Primary Service Area	845	20.6%
Secondary Service Area	10,240	25.0%
State of Missouri	-	29.2%
National	-	30.6%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2023 USA Projection, 30.6% of households nationally had children present.

Median Age by Census Block Group Map

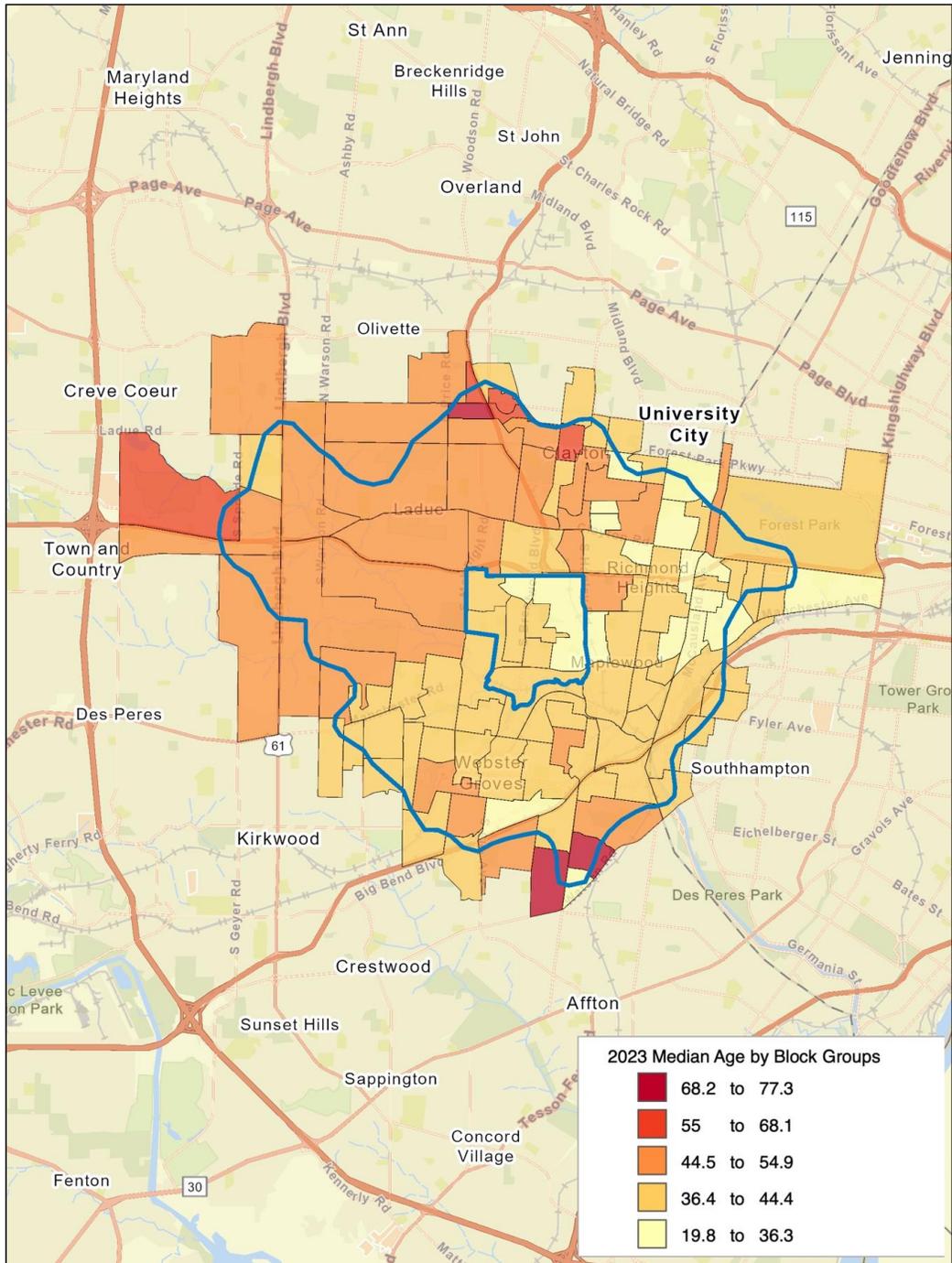
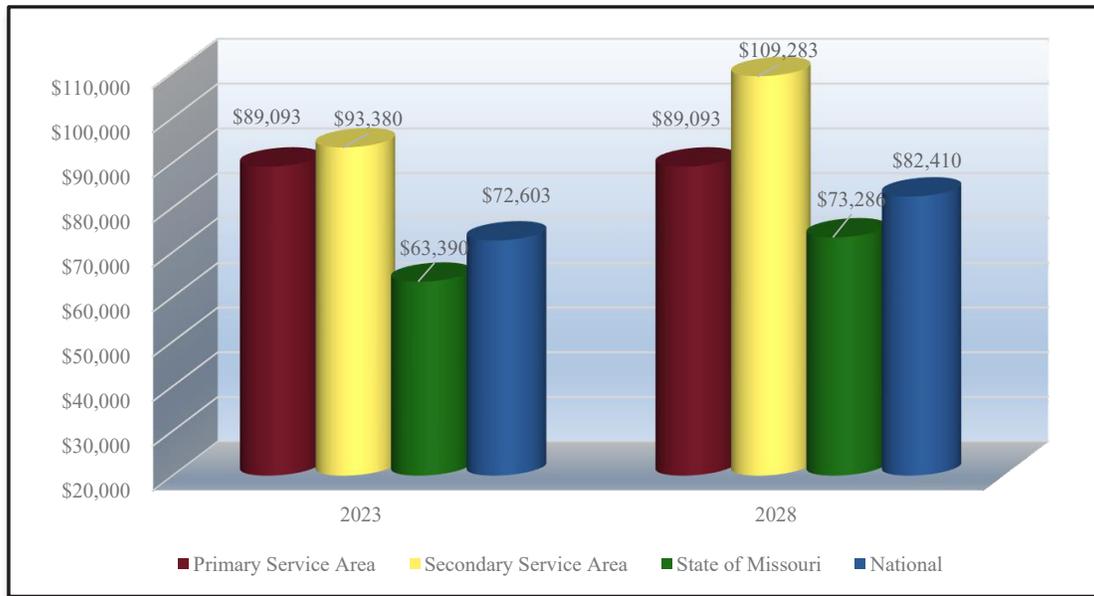


Table C – Median Household Income:

	2023 Projection	2028 Projection
Primary Service Area	\$89,093	\$89,093
Secondary Service Area	\$93,380	\$109,283
State of Missouri	\$63,390	\$73,286
National	\$72,603	\$82,410

Chart C (1) – Median Household Income:

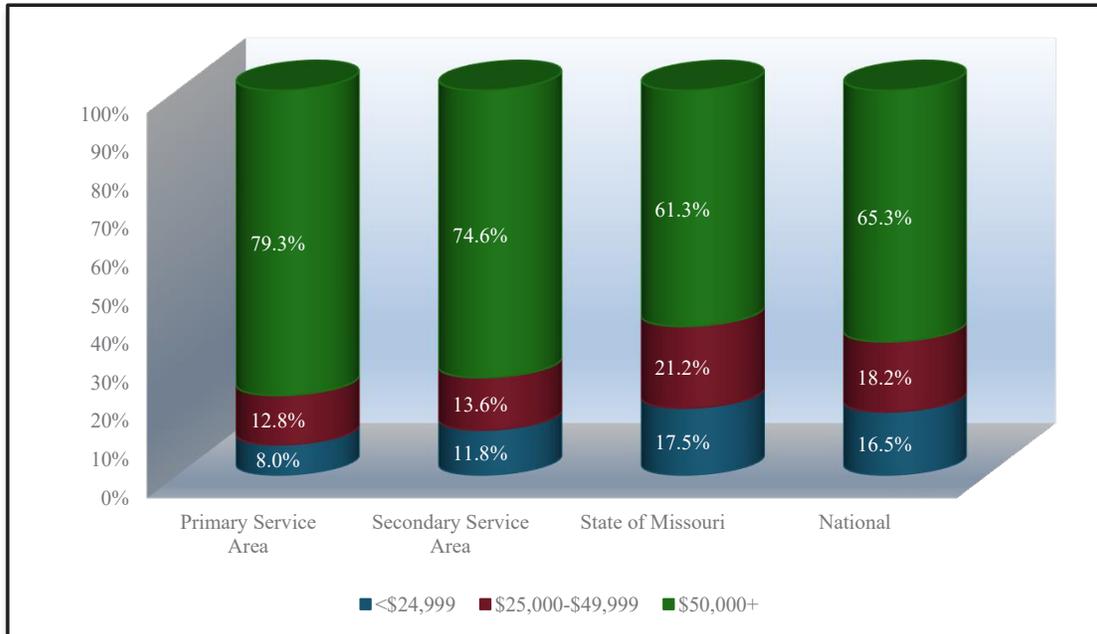


Based on 2023 projections for median household income the following narrative describes the service area:

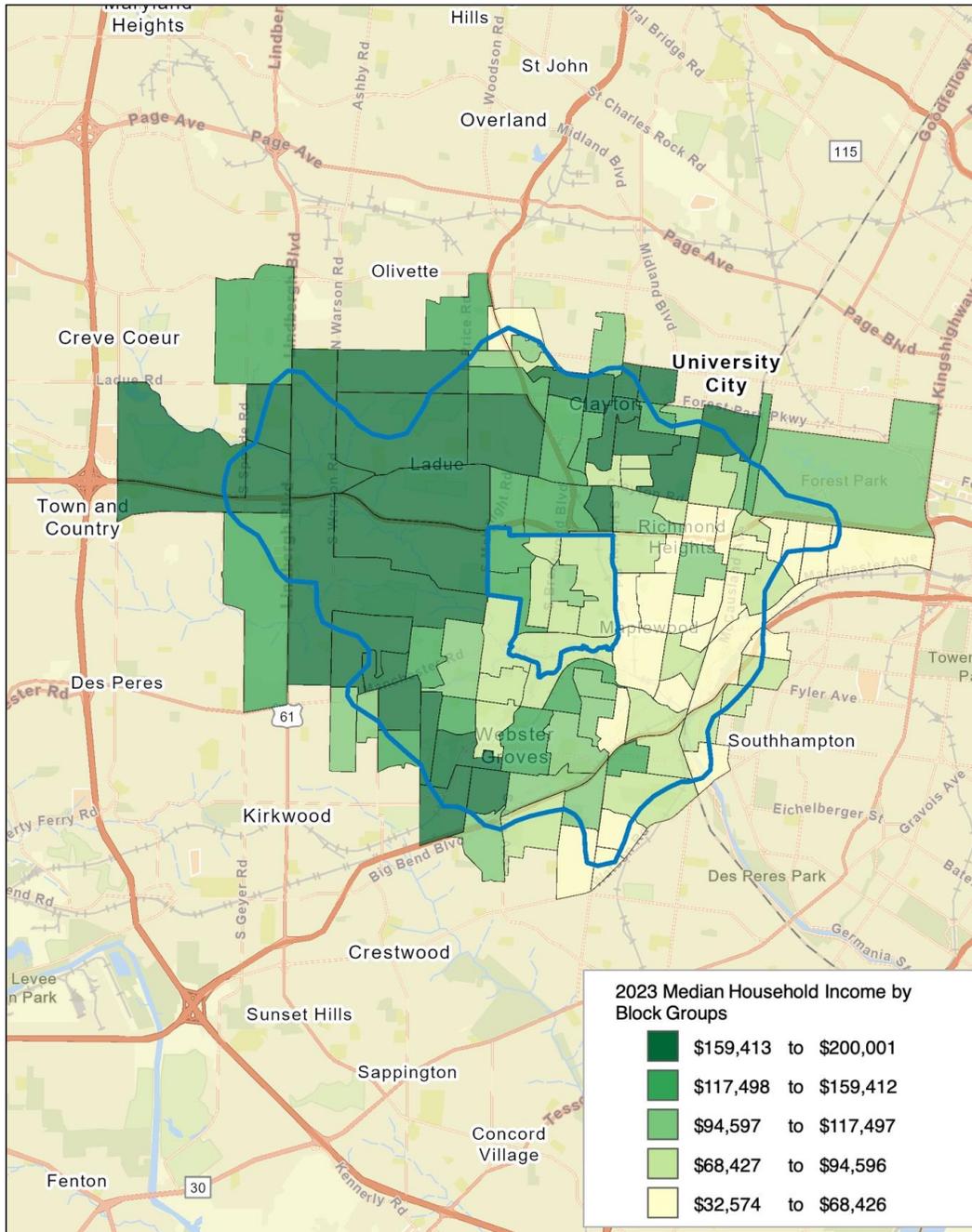
In the Primary Service Area, the percentage of households with median income over \$50,000 per year is 79.3% compared to 61.6% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 8.0% compared to a level of 18.0% nationally.

In the Secondary Service Area, the percentage of households with median income over \$50,000 per year is 74.6% compared to 61.6% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 11.8% compared to a level of 18.0% nationally.

Chart C (2) – Median Household Income Distribution



Household Income by Census Block Group Map



In addition to taking a look at the Median Age and Median Income, it is important to examine Household Budget Expenditures. Reviewing housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snapshot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

Table D – Household Budget Expenditures³:

Primary Service Area	SPI	Average Amount Spent	Percent
Housing	120	\$36,664.87	33.5%
<i>Shelter</i>	121	\$30,046.72	27.4%
<i>Utilities, Fuel, Public Service</i>	114	\$6,618.15	6.0%
Entertainment & Recreation	118	\$4,448.88	4.1%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	144	\$44,067.98	33.6%
<i>Shelter</i>	146	\$36,208.14	27.6%
<i>Utilities, Fuel, Public Service</i>	135	\$7,859.84	6.0%
Entertainment & Recreation	140	\$5,305.34	4.1%

State of Missouri	SPI	Average Amount Spent	Percent
Housing	86	\$26,276.74	32.5%
<i>Shelter</i>	85	\$20,988.74	26.0%
<i>Utilities, Fuel, Public Service</i>	91	\$5,287.99	6.5%
Entertainment & Recreation	90	\$3,398.00	4.2%

SPI: Spending Potential Index as compared to the National number of 100.

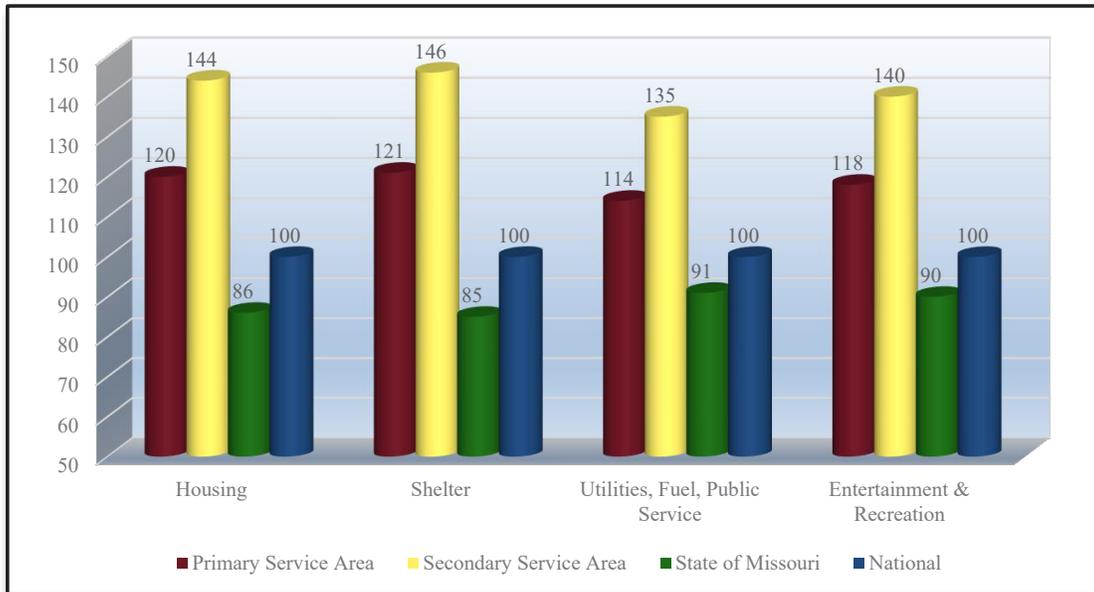
Average Amount Spent: The average amount spent per household.

Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

³ Consumer Spending data are derived from the 2019 and 2021 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2023 and 2028.

Chart D – Household Budget Expenditures Spending Potential Index:



The consistency between the median household income and the household budget expenditures is important. It also points to the fact that compared to a National level the dollars available, the money being spent in the Primary Service Area is higher and the Secondary Service Area is yet higher. This could point to the ability to pay for programs and services offered at a recreation facility of any variety.

The total number of housing units in the Primary Service Area is 4,445 and 93.4% are occupied, or 4,152 housing units. The total vacancy rate for the service area is 6.0%. As a comparison, the vacancy rate nationally was 11.6%. Of the available units:

- For Rent 1.1%
- Rented, not Occupied 0.0%
- For Sale 0.3%
- Sold, not Occupied 2.5%
- For Seasonal Use 0.4%
- Other Vacant 1.7%

Recreation Expenditures Spending Potential Index: Finally, through the demographic provider that B*K utilizes for the market analysis portion of the report, we can examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

Table E – Recreation Expenditures Spending Potential Index⁴:

Primary Service Area	SPI	Average Spent
Fees for Participant Sports	122	\$145.50
Fees for Recreational Lessons	121	\$175.33
Social, Recreation, Club Membership	125	\$346.86
Exercise Equipment/Game Tables	132	\$128.60
Other Sports Equipment	106	\$11.78

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	148	\$176.53
Fees for Recreational Lessons	152	\$220.28
Social, Recreation, Club Membership	151	\$419.06
Exercise Equipment/Game Tables	150	\$146.47
Other Sports Equipment	125	\$13.94

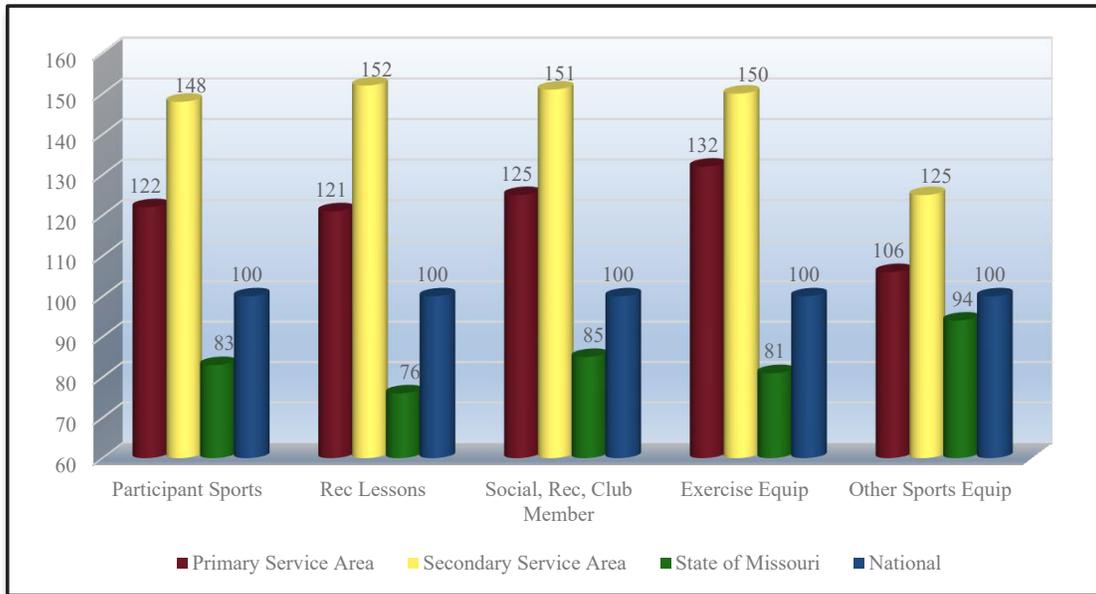
State of Missouri	SPI	Average Spent
Fees for Participant Sports	83	\$99.63
Fees for Recreational Lessons	76	\$110.74
Social, Recreation, Club Membership	85	\$235.30
Exercise Equipment/Game Tables	81	\$78.89
Other Sports Equipment	94	\$10.44

Average Amount Spent: The average amount spent for the service or item in a year.

SPI: Spending potential index as compared to the national number of 100.

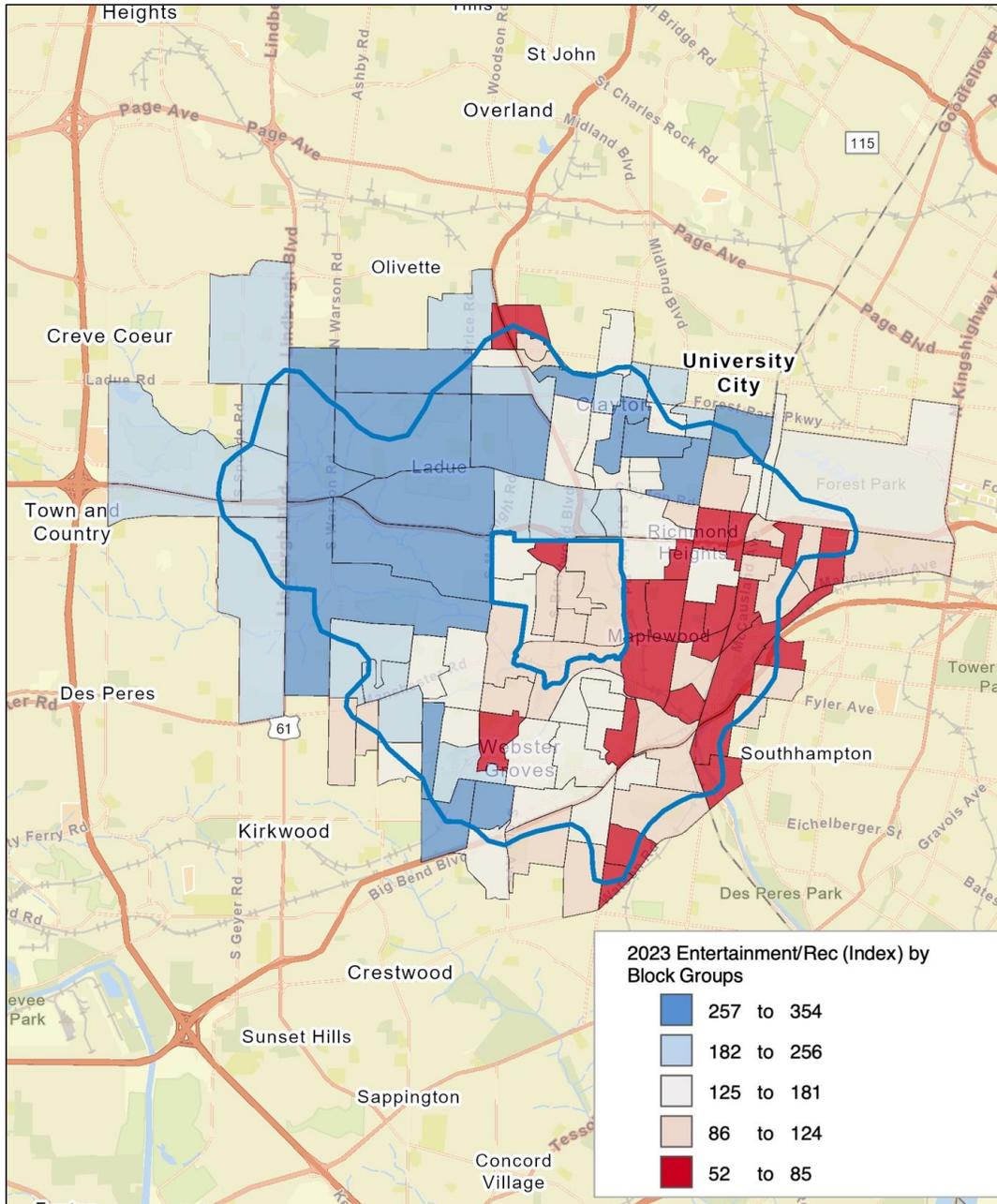
⁴ Consumer Spending data are derived from the 2019 and 2021 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Chart E – Recreation Spending Potential Index:



Again, there is a great deal of consistency between median household income, household budget expenditures and now recreation and spending potential.

Recreation Spending Potential Index by Census Block Group Map



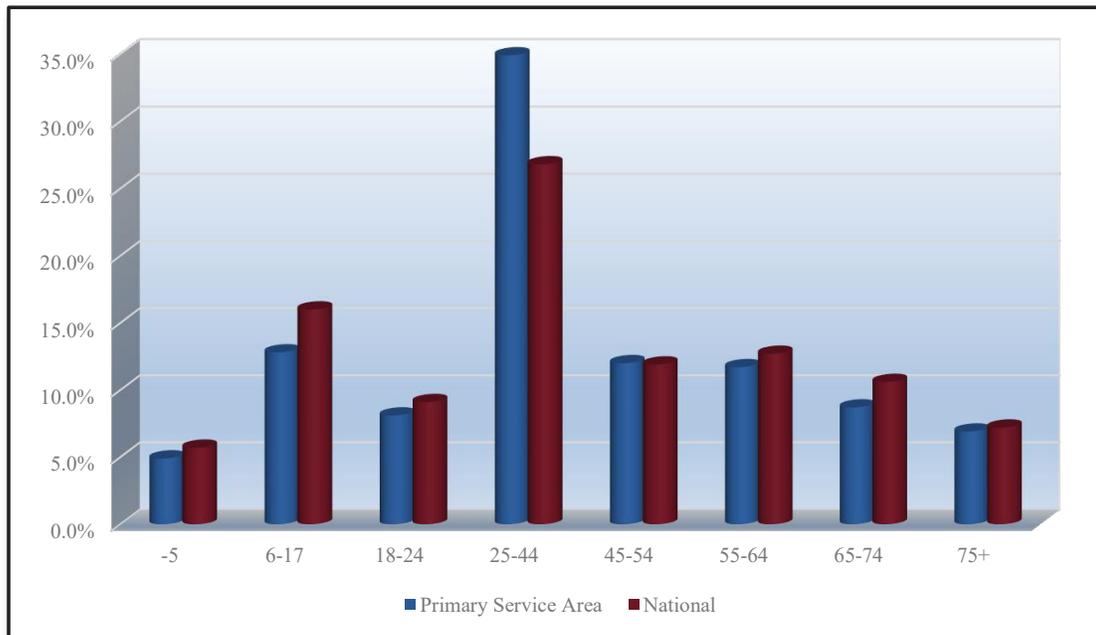
Population Distribution by Age: Utilizing census information for the Primary Service Area, the following comparisons are possible.

Table F – 2023 Primary Service Area Age Distribution (ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	405	4.9%	5.7%	-0.8%
5-17	1,057	12.8%	16.0%	-3.2%
18-24	669	8.1%	9.1%	-1.0%
25-44	2,880	34.9%	26.8%	+8.1%
45-54	988	12.0%	11.9%	+0.1%
55-64	962	11.7%	12.7%	-1.0%
65-74	717	8.7%	10.6%	-1.9%
75+	573	6.9%	7.2%	-0.3%

Population: 2023 census estimates in the different age groups in the Primary Service Area.
% of Total: Percentage of the Primary Service Area population in the age group.
National Population: Percentage of the national population in the age group.
Difference: Percentage difference between the Primary Service Area population and the national population.

Chart F – 2023 Primary Service Area Age Group Distribution



The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in all

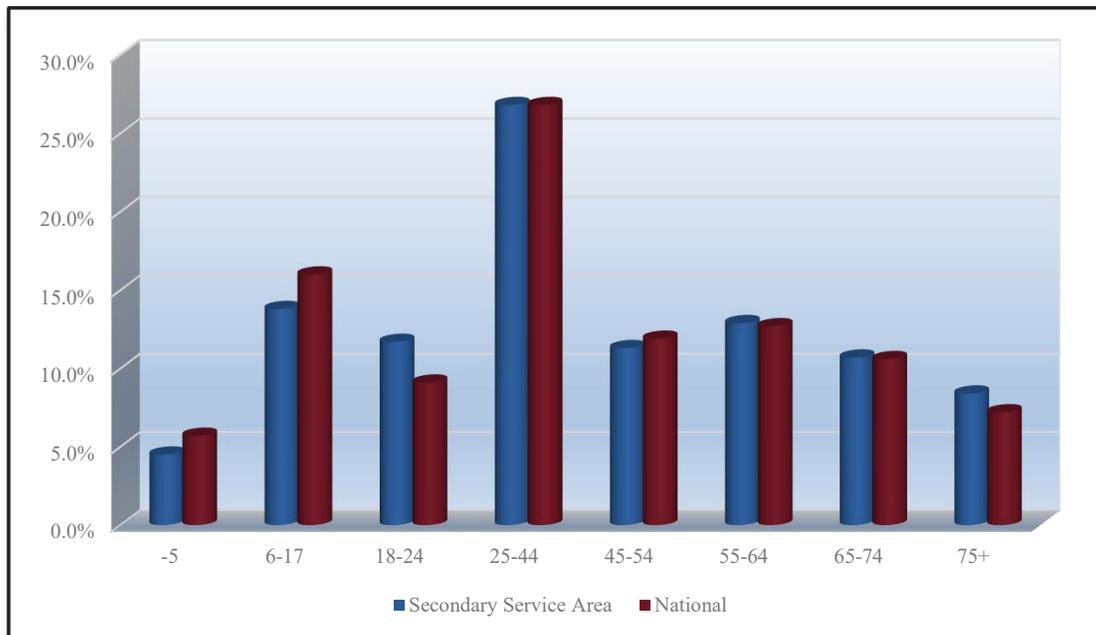
of the age groups except for 25-44 and 45-54. The greatest positive variance is in the 25-44 age group with +8.0%, while the greatest negative variance is in the 5-17 age group with -3.2%.

Table G – 2023 Secondary Service Area Age Distribution (ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
0-5	4,125	4.5%	5.7%	-1.3%
5-17	12,786	13.8%	16.0%	-2.2%
18-24	10,883	11.7%	9.1%	+2.6%
25-44	24,821	26.8%	26.8%	-0.1%
45-54	10,484	11.3%	11.9%	-0.6%
55-64	11,972	12.9%	12.7%	+0.2%
65-74	9,916	10.7%	10.6%	+0.1%
75+	7,819	8.4%	7.2%	+1.2%

Population: 2023 census estimates in the different age groups in the Secondary Service Area.
% of Total: Percentage of the Secondary Service Area population in the age group.
National Population: Percentage of the national population in the age group.
Difference: Percentage difference between the Secondary Service Area population and the national population.

Chart G – 2023 Secondary Service Area Age Group Distribution



The demographic makeup of the Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a smaller population in the

age groups under 5, 5-17, 25-44, and 45-54 age groups. The greatest positive variance is in the 18-24 age group with +2.6%, while the greatest negative variance is in the 5-17 age group with -2.2%.

Population Distribution Comparison by Age: Utilizing census information from the Primary Service Area, the following comparisons are possible.

Table H – 2023 Primary Service Area Population Estimates (U.S. Census Information and ESRI)

Ages	2020 Census	2023 Projection	2028 Projection	Percent Change	Percent Change Nat'l
-5	487	405	392	-19.5%	-9.1%
5-17	1,040	1,057	1,024	-1.5%	-8.2%
18-24	643	669	668	+3.9%	-7.7%
25-44	3,079	2,880	2,750	-10.7%	+3.6%
45-54	1,110	988	1,066	-4.0%	-16.5%
55-64	847	962	895	+5.7%	+1.7%
65-74	521	717	775	+48.8%	+61.3%
75+	500	573	641	+28.2%	+51.1%

Chart H – Primary Service Area Population Growth

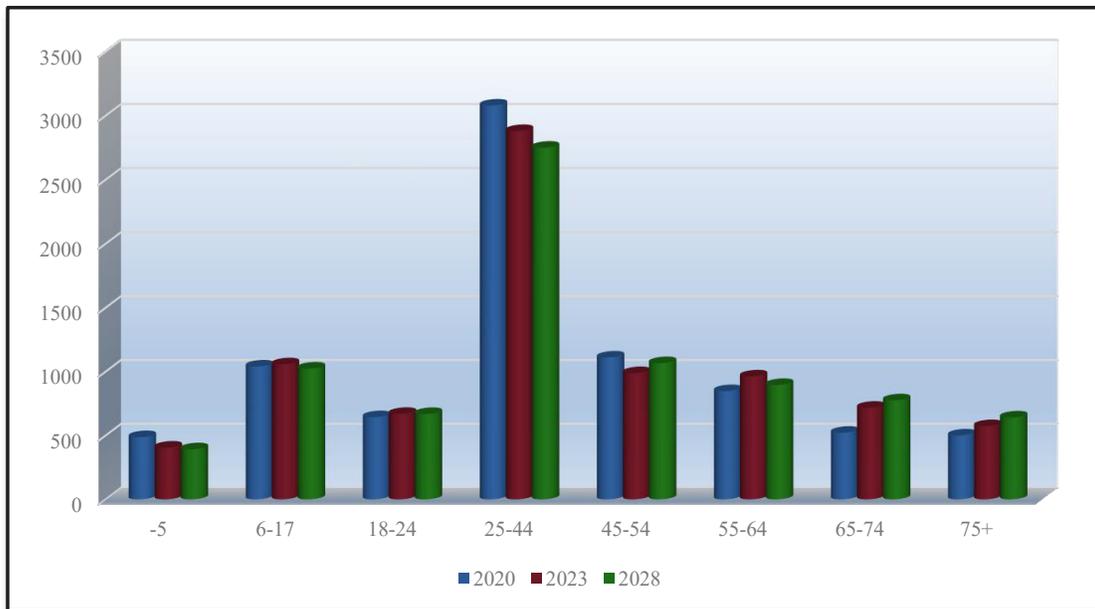


Table-G illustrates the growth or decline in age group numbers from the 2020 census until the year 2028. The population of the United States is aging, and it is not unusual to find negative growth

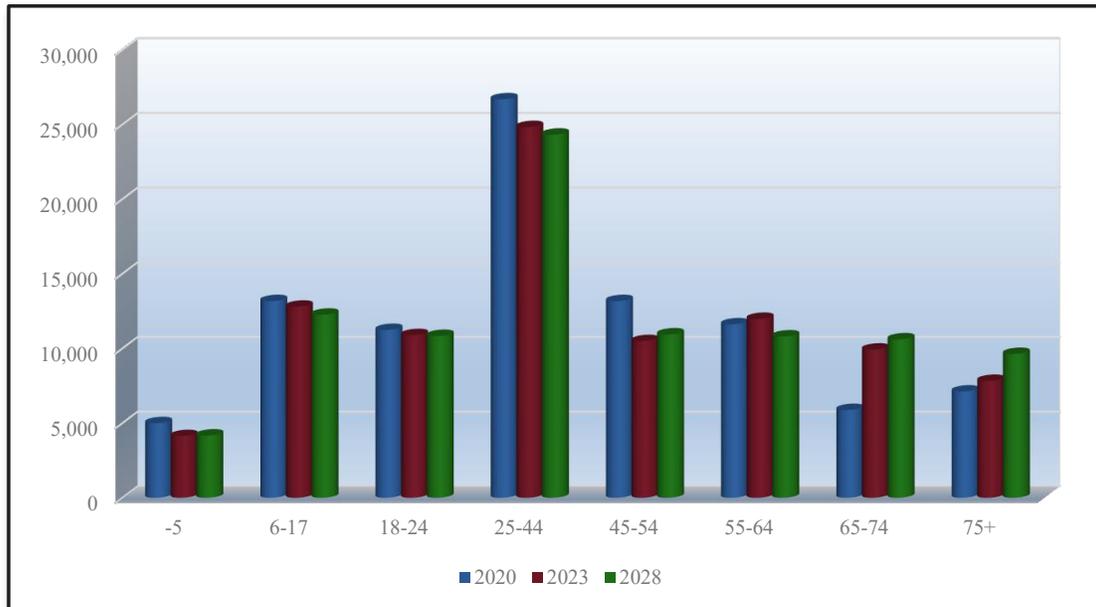
numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Population Distribution by Age Over Time: Utilizing census information from the Secondary Service Area, the following comparisons are possible.

Table I – 2023 Secondary Service Area Population Estimates (U.S. Census Information and ESRI)

Ages	2020 Census	2023 Projection	2028 Projection	Percent Change	Percent Change Nat'l
-5	4,991	4,125	4,164	-16.6%	-9.1%
5-17	13,162	12,786	12,251	-6.9%	-8.2%
18-24	11,228	10,883	10,826	-3.6%	-7.7%
25-44	26,680	24,821	24,312	-8.9%	+3.6%
45-54	13,161	10,484	10,931	-16.9%	-16.5%
55-64	11,604	11,972	10,795	-7.0%	+1.7%
65-74	5,872	9,916	10,600	+80.5%	+61.3%
75+	7,110	7,819	9,623	+35.3%	+51.1%

Chart I – Secondary Service Area Population Growth (done)



The population of the United States is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Below is listed the distribution of the population by race and ethnicity for the Primary Service Area for 2023 population projections. Those numbers were developed from 2020 Census Data.

Table J – Primary Service Area Ethnic Population and Median Age 2023

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of MO Population
Hispanic	319	30.8	3.9%	5.4%

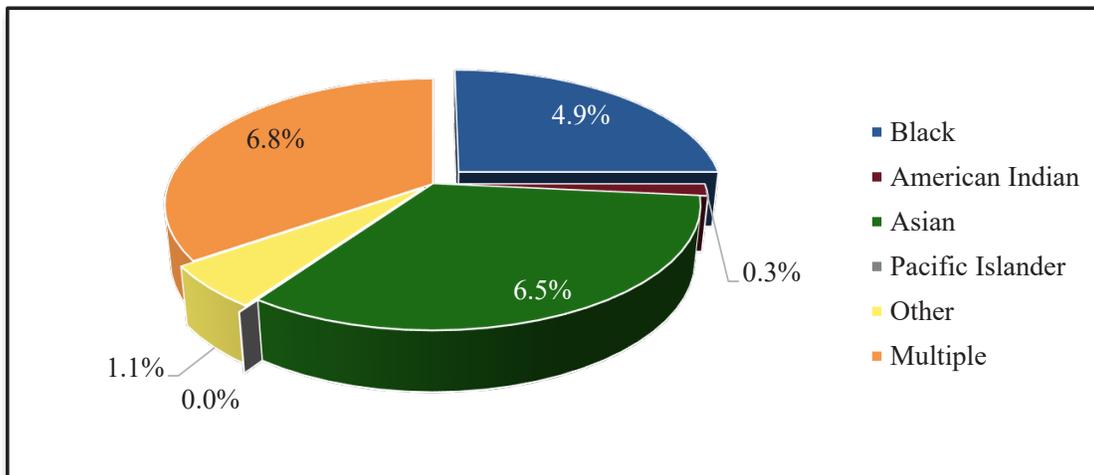
Table K – Primary Service Area by Race and Median Age 2023

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MO Population
White	6,641	39.8	80.5%	76.5%
Black	400	40.0	4.9%	11.2%
American Indian	22	43.3	0.3%	0.5%
Asian	540	34.1	6.5%	2.3%
Pacific Islander	1	42.5	0.0%	0.2%
Other	87	32.5	1.1%	2.2%
Multiple	560	23.1	6.8%	7.1%

2023 Primary Service Area Total Population: 8,251 Residents

Chart K – 2023 Primary Service Area Population by Non-White Race



Ethnicity and Race: Below is the distribution of the population by ethnicity and race for the Secondary Service Area for 2023 population projections. Those numbers were developed from 2020 Census Data.

Table L – Secondary Service Area Ethnic Population and Median Age 2023

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of MO Population
Hispanic	3,828	29.2%	4.1%	5.4%

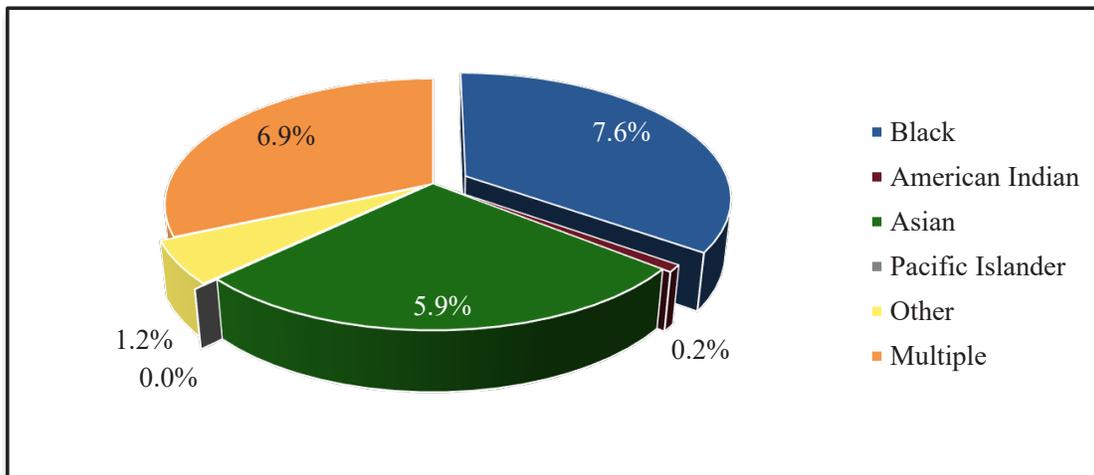
Table M – Secondary Service Area by Race and Median Age 2023

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of MO Population
White	72,583	42.6	78.2%	76.5%
Black	7,090	37.9	7.6%	11.2%
American Indian	169	39.3	0.2%	0.5%
Asian	5,498	32.5	5.9%	2.3%
Pacific Islander	22	37.5	0.0%	0.2%
Other	1,075	32.0	1.2%	2.2%
Multiple	6,369	23.1	6.9%	7.1%

2023 Secondary Service Area Total Population: 92,805 Residents

Chart M – 2023 Secondary Service Area Population by Non-White Race



Tapestry Segmentation

Tapestry segmentation represents the 4th generation of market segmentation systems that began 30 years ago. The 67-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. While the demographic landscape of the U.S. has changed significantly since the 2000 Census, the tapestry segmentation has remained stable as neighborhoods have evolved.

There is value including this information for Brentwood, MO. The data assists the organization in understanding the consumers/constituents in their service area and supply them with the right products and services.

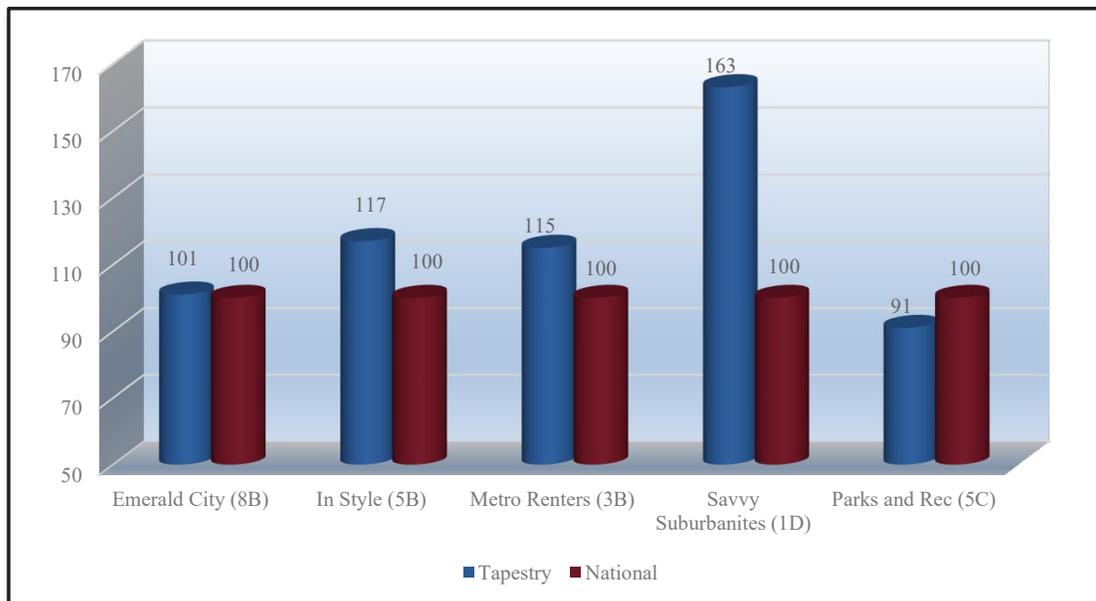
The Tapestry segmentation system classifies U.S. neighborhoods into 65 unique market segments. Neighborhoods are sorted by more than 60 attributes including; income, employment, home value, housing types, education, household composition, age and other key determinates of consumer behavior.

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provide a brief description of each. This information combined with the key indicators and demographic analysis of each service area help further describe the markets that the Primary and Secondary Service Areas look to serve with programs, services, and special events.

Table N – Primary Service Area Tapestry Segment Comparison (ESRI estimates)

	Primary Service Area		Demographics	
	Percent	Cumulative Percent	Median Age	Median HH Income
Emerald City (8B)	37.5%	37.5%	37.4	\$59,200
In Style (5B)	27.8%	65.3%	42.0	\$73,000
Metro Renters (3B)	19.9%	85.2%	32.5	\$67,000
Savvy Suburbanites (1D)	10.6%	95.8%	45.1	\$108,700
Parks and Rec (5C)	4.3%	100.1%	40.9	\$60,000

Chart N – Primary Service Area Tapestry Segment Entertainment Spending:



Emerald City (8B) – Young, mobile and well educated, this group is highly connected. They make environmentally friendly purchases. Embrace food and culture, balanced with time at the gym.

In Style (5B) – This group embraces the urban lifestyle. They are fully connected to digital devices and support the arts and charities/causes. Most do not have children. Meticulous planners.

Metro Renters (3B) – These residents are highly mobile and educated. Spend large portion of their income on clothes and technology. Willing to take risks. Socializing and social status is important. Participate in Yoga, Pilates and skiing.

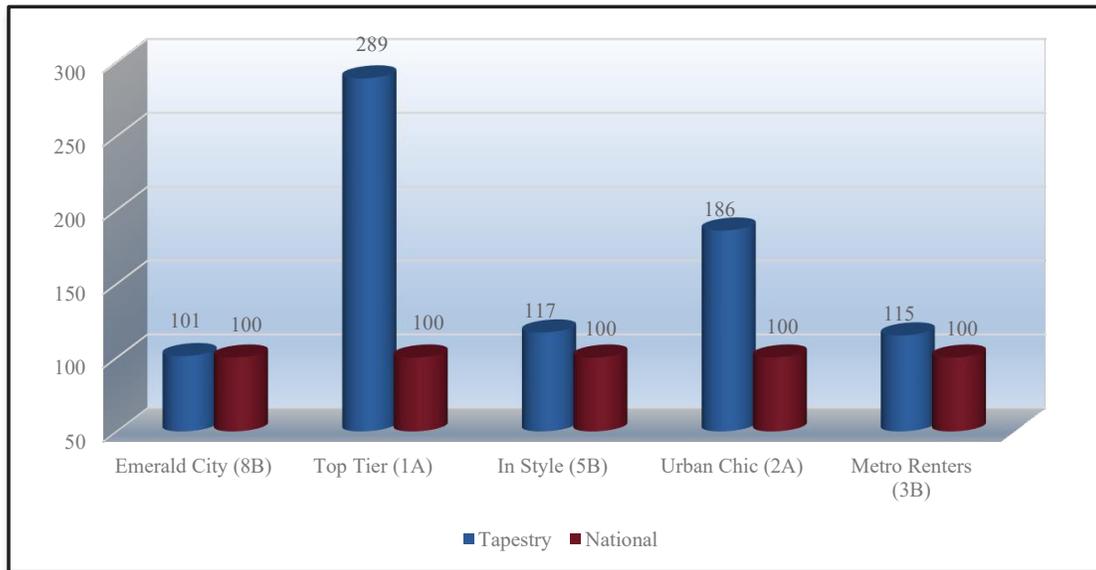
Savvy Suburbanites (1D) – Families include empty nesters and those with adult children still at home. Make well-informed researched purchases. Well-educated that enjoy cultural and sporting events and being physically active. Invest heavily in sports gear and exercise equipment.

Parks and Rec (5C) – Well-established neighborhoods with dual income married couples. They are careful consumers. Take full advantage of the local parks, trails and recreation programs.

Table O – Secondary Service Area Tapestry Segment Comparison (ESRI estimates)

	Primary Service Area		Demographics	
	Percent	Cumulative Percent	Median Age	Median HH Income
Emerald City (8B)	19.3%	19.3%	37.4	\$59,200
Top Tier (1A)	13.1%	32.4%	47.3	\$173,200
In Style (5B)	10.6%	43.0%	42.0	\$73,000
Urban Chic (2A)	10.5%	53.5%	43.3	\$109,400
Metro Renters (3B)	6.6%	60.1%	32.5	\$67,000

Chart O – Secondary Service Area Tapestry Segment Entertainment Spending:



Emerald City (8B) – Young, mobile and well educated, this group is highly connected. They make environmentally friendly purchases. Embrace food and culture, balanced with time at the gym.

Top Tier (1A) – With significant purchasing power, group indulges on themselves. Visit spas and fitness centers as well as high-end retailers. Vacation often and fill time with charity events and arts.

In Style (5B) – This group embraces the urban lifestyle. They are fully connected to digital devices and support the arts and charities/causes. Most do not have children. Meticulous planners.

Urban Chic (2A) – Professionals living an exclusive lifestyle. Environmentally aware and like to live “green.” Embrace city life with museums, arts, culture and sports.

Metro Renters (3B) – These residents are highly mobile and educated. Spend large portion of their income on clothes and technology. Willing to take risks. Socializing and social status is important. Participate in Yoga, Pilates and skiing.

Demographic Summary

The following summarizes the demographic characteristics of the service areas.

- The population within the Primary Service Area (8,251) is not such that it would support recreation facilities by itself; however, the Secondary Service Area (92,805) would. B*K typically looks for a population of greater than 50,000 within the primary service area as a key indicator.
- The median age in the Primary Service Area is slightly lower than the State and National numbers. The median age in the Secondary Service Area is similar to the State and National numbers. A lower median age points to young families with children, which are significant participants in recreation and aquatic programs. As such, the median age is a benefit to the project.
- Both the Primary Service Area (20.6%) and the Secondary Service Area (25.07%) have a lower percentage of households with children than both the state and national average of about 30%.
- The Primary Service Area has a higher median household income (\$89,093) than the state of Missouri (\$63,390) and the national average (\$72,603). Income level is important when it comes to price point for programs and services, subsequently the cost recovery level of a facility. The income level suggests that the service areas will be able to support recreation programs and facilities.
- The age distribution in the City of Brentwood is such that 17.7% is under the age of 18 and 27.3% is over the age of 55 in the Primary Service Area. In the Secondary Service Area, 18.3% are under the age of 18 and 32.0% are over the age of 55. These are two age groups that will be significant users of aquatic programs and services. Additionally, it is projected that the 55+ age categories are projected to increase substantially through 2028.
- The tapestries in both Service Areas generally illustrate populations that have interest in gyms, fitness and fitness center, sports and sporting events, recreation etc. The segments indicate populations that have generally resources to support these interests.

Section II – Participation Figures

Market Potential Index for Adult Participation: In addition to examining the participation numbers for various outdoor activities through the National Sporting Goods Association, the 2020 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in outdoor activities.

Table P – Market Potential Index (MPI) for Participation in Activities in Primary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobic Exercise	612	9.0%	108
Baseball	179	2.6%	102
Basketball	373	5.5%	96
Bicycle Riding	1,116	16.4%	136
Exercise Walking	2,652	39.1%	115
Football (tackle)	175	2.6%	108
Pilates	232	3.4%	122
Running/Jogging	1,041	15.3%	136
Soccer	229	3.4%	107
Softball	108	1.6%	98
Swimming	1,200	17.7%	117
Tennis	352	5.2%	136
Volleyball	195	2.9%	122
Weightlifting	1,215	17.9%	127
Yoga	1,024	15.1%	138

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in some activities is greater than the national number of 100 in all but 2 activities.

Table Q – Market Potential Index (MPI) for Participation in Activities in Secondary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobic Exercise	7,326	9.7%	116
Baseball	1,884	2.5%	96
Basketball	4,167	5.5%	96
Bicycle Riding	11,302	14.9%	124
Exercise Walking	29,489	38.9%	115
Football (tackle)	1,836	2.4%	102
Pilates	2,663	3.5%	125
Running/Jogging	10,788	14.2%	126
Soccer	2,306	3.0%	97
Softball	1,157	1.5%	94
Swimming	12,815	16.9%	112
Tennis	4,056	5.3%	140
Volleyball	195	2.9%	122
Weightlifting	12,716	16.8%	119
Yoga	10,704	14.1%	129

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in some activities is greater than the national number of 100 in all but 4 activities.



Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. The data is collected in one year and the report is issued in May of the following year. This information provides the data necessary to overlay rate of participation onto the Primary and Secondary Area to determine market potential.

B*K takes the national average and combines that with participation percentages of the Service Areas based upon age distribution, median income, region and National number. Those four percentages are then averaged together to create a unique participation percentage for the service area. This participation percentage, when applied to the population of the Primary Service Area, then provides an idea of the market potential for outdoor recreation.

Table R –Participation Rates in the Primary Service Area

Indoor Activities	Age	Income	Region	Nation	Average
Aerobic Exercise	16.0%	16.5%	20.6%	15.8%	17.2%
Baseball	3.5%	5.0%	3.3%	3.7%	3.9%
Basketball	7.6%	7.8%	6.1%	7.6%	7.3%
Bicycle Riding	14.0%	15.5%	15.4%	14.6%	14.9%
Cheerleading	2.1%	1.5%	0.9%	1.0%	1.4%
Exercise Walking	37.2%	40.4%	37.6%	37.3%	38.1%
Exercise w/ Equipment	19.6%	20.8%	15.6%	19.1%	18.8%
Football (tackle)	2.1%	2.5%	3.2%	2.2%	2.5%
Gymnastics	1.6%	2.3%	1.4%	1.8%	1.8%
Hockey (ice)	1.0%	0.8%	2.5%	1.0%	1.3%
Ice/Figure Skating	2.6%	3.2%	3.6%	2.7%	3.0%
Lacrosse	0.8%	0.4%	0.3%	0.8%	0.6%
Pickleball	2.1%	2.7%	3.4%	2.1%	2.6%
Pilates	2.2%	2.3%	1.2%	2.0%	1.9%
Running/Jogging	15.6%	17.6%	13.7%	14.8%	15.4%
Skateboarding	2.0%	2.3%	2.3%	2.1%	2.2%
Soccer	4.4%	5.2%	4.6%	4.6%	4.7%
Softball	3.1%	4.3%	3.6%	3.1%	3.5%
Swimming	15.7%	19.0%	18.1%	16.4%	17.3%
Tennis	4.7%	5.7%	3.1%	4.7%	4.5%
Volleyball	3.7%	4.7%	4.4%	3.8%	4.2%
Weightlifting	13.2%	12.8%	12.1%	12.7%	12.7%
Workout @ Club	10.2%	10.2%	8.8%	9.7%	9.7%
Wrestling	1.0%	0.9%	0.9%	1.0%	0.9%
Yoga	11.0%	10.8%	7.3%	10.4%	9.9%
Did Not Participate	20.4%	18.8%	20.6%	20.6%	20.1%

Age: Participation based on individuals ages 7 & Up of the Service Area.
Income: Participation based on the 2023 estimated median household income in the Service Area.
Region: Participation based on regional statistics (West North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Table S – Participation Rates in the Secondary Service Area

Indoor Activities	Age	Income	Region	Nation	Average
Aerobic Exercise	15.6%	16.5%	20.6%	15.8%	17.1%
Baseball	3.5%	5.0%	3.3%	3.7%	3.9%
Basketball	7.3%	7.8%	6.1%	7.6%	7.2%
Bicycle Riding	14.1%	15.5%	15.4%	14.6%	14.9%
Cheerleading	2.1%	1.5%	0.9%	1.0%	1.4%
Exercise Walking	37.4%	40.4%	37.6%	37.3%	38.2%
Exercise w/ Equipment	19.2%	20.8%	15.6%	19.1%	18.7%
Football (tackle)	2.1%	2.5%	3.2%	2.2%	2.5%
Gymnastics	1.6%	2.3%	1.4%	1.8%	1.8%
Hockey (ice)	1.0%	0.8%	2.5%	1.0%	1.3%
Ice/Figure Skating	2.6%	3.2%	3.6%	2.7%	3.0%
Lacrosse	0.8%	0.4%	0.3%	0.8%	0.6%
Pickleball	2.1%	2.7%	3.4%	2.1%	2.6%
Pilates	2.0%	2.3%	1.2%	2.0%	1.9%
Running/Jogging	14.6%	17.6%	13.7%	14.8%	15.2%
Skateboarding	2.1%	2.3%	2.3%	2.1%	2.2%
Soccer	4.3%	5.2%	4.6%	4.6%	4.7%
Softball	2.9%	4.3%	3.6%	3.1%	3.5%
Swimming	15.8%	19.0%	18.1%	16.4%	17.3%
Tennis	4.6%	5.7%	3.1%	4.7%	4.5%
Volleyball	3.7%	4.7%	4.4%	3.8%	4.2%
Weightlifting	12.7%	12.8%	12.1%	12.7%	12.6%
Workout @ Club	9.8%	10.2%	8.8%	9.7%	9.6%
Wrestling	1.0%	0.9%	0.9%	1.0%	0.9%
Yoga	10.3%	10.8%	7.3%	10.4%	9.7%
Did Not Participate	21.0%	18.8%	20.6%	20.6%	20.3%

Age: Participation based on individuals ages 7 & Up of the Service Area.
Income: Participation based on the 2023 estimated median household income in the Service Area.
Region: Participation based on regional statistics (West North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-R above plus the 2020 census information and census estimates for 2023 and 2028 (over age 7) the following comparisons are available.

Table T –Participation Growth or Decline for Indoor Activities in Primary Service Area

Indoor Activities	Average	2020 Population	2023 Population	2028 Population	Difference
Aerobic Exercise	17.2%	1,305	1,322	1,319	14
Baseball	3.9%	294	298	297	3
Basketball	7.3%	551	559	557	6
Bicycle Riding	14.9%	1,127	1,142	1,139	12
Cheerleading	1.4%	105	106	106	1
Exercise Walking	38.1%	2,888	2,926	2,920	32
Exercise w/ Equipment	18.8%	1,422	1,440	1,437	16
Football (tackle)	2.5%	189	191	191	2
Gymnastics	1.8%	134	136	135	1
Hockey (ice)	1.3%	101	102	102	1
Ice/Figure Skating	3.0%	230	233	232	3
Lacrosse	0.6%	43	43	43	0
Pickleball	2.6%	195	198	197	2
Pilates	1.9%	146	148	147	2
Running/Jogging	15.4%	1,168	1,183	1,181	13
Skateboarding	2.2%	166	168	167	2
Soccer	4.7%	356	360	360	4
Softball	3.5%	267	271	270	3
Swimming	17.3%	1,310	1,327	1,324	14
Tennis	4.5%	344	349	348	4
Volleyball	4.2%	315	319	319	3
Weightlifting	12.7%	963	976	974	11
Workout @ Club	9.7%	737	747	746	8
Wrestling	0.9%	72	73	73	1
Yoga	9.9%	749	759	757	8
Did Not Participate	20.1%	1,524	1,544	1,540	17

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The “Did Not Participate” statistics refers to all 58 activities outlined in the NSGA 2022 Survey Instrument.

Anticipated Participation Number: Utilizing the average percentage from Table-S above plus the 2020 census information and census estimates for 2023 and 2028 (over age 7) the following comparisons are available.

Table U –Participation Growth or Decline for Indoor Activities in Secondary Service Area

Indoor Activities	Average	2020 Population	2023 Population	2028 Population	Difference
Aerobic Exercise	17.1%	14,858	14,881	14,998	139
Baseball	3.9%	3,353	3,358	3,385	31
Basketball	7.2%	6,247	6,257	6,306	59
Bicycle Riding	14.9%	12,924	12,943	13,045	121
Cheerleading	1.4%	1,195	1,197	1,206	11
Exercise Walking	38.2%	33,116	33,165	33,427	311
Exercise w/ Equipment	18.7%	16,187	16,211	16,339	152
Football (tackle)	2.5%	2,162	2,165	2,182	20
Gymnastics	1.8%	1,543	1,546	1,558	14
Hockey (ice)	1.3%	1,149	1,150	1,160	11
Ice/Figure Skating	3.0%	2,623	2,627	2,648	25
Lacrosse	0.6%	497	497	501	5
Pickleball	2.6%	2,227	2,230	2,248	21
Pilates	1.9%	1,633	1,636	1,648	15
Running/Jogging	15.2%	13,164	13,183	13,287	124
Skateboarding	2.2%	1,912	1,915	1,930	18
Soccer	4.7%	4,065	4,071	4,103	38
Softball	3.5%	3,018	3,023	3,047	28
Swimming	17.3%	15,034	15,056	15,175	141
Tennis	4.5%	3,916	3,922	3,953	37
Volleyball	4.2%	3,602	3,608	3,636	34
Weightlifting	12.6%	10,915	10,931	11,018	102
Workout @ Club	9.6%	8,359	8,371	8,437	78
Wrestling	0.9%	820	822	828	8
Yoga	9.7%	8,421	8,434	8,500	79
Did Not Participate	20.3%	17,564	17,590	17,729	165

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The “Did Not Participate” statistics refers to all 58 activities outlined in the NSGA 2022 Survey Instrument.

Non-Sport Participation Statistics: It is important to note that participation rates in non-sport activities. While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States. It tracks various arts activities that Americans (aged 18 and over) report having done in a year. It also asks questions about adults' preferences for different kinds of music, and it seeks to understand participation in non-arts leisure events such as sports and exercise, outdoor activities, and civic and social affairs.

The participation numbers for these activities are national numbers and the information falls into the following categories:

- Attending Arts Activities
- Reading Books and Literature
- Consuming Art through Electronic Media
- Making and Sharing Art
- Participating in Arts Learning
- Perceptions of Arts Availability

Attending Arts Activities

Table V – Percentage of U.S. Adult Attending a Performing Arts Activity at Least Once in the Past 12-Months

Music	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Jazz	7.8%	8.1%	8.6%	+0.3%	+0.5%
Classical Music	9.3%	8.8%	8.6%	-0.5%	-0.2%
Opera	2.1%	2.1%	2.2%	+0.0%	+0.1%
Latin Music	4.9%	5.1%	5.9%	+0.2%	+0.8%
Outdoor Performing Arts Festival	20.8%	20.8%	24.2%	+0.0%	+3.4%

Plays	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Musical Plays	16.7%	15.2%	16.5%	-1.5%	+1.3%
Non-Musical Plays	9.4%	8.3%	9.4%	-1.1%	+1.1%

Dance	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Ballet	2.9%	2.7%	3.1%	-0.2%	+0.4%
Other Dance	5.2%	5.6%	6.3%	+0.4%	+0.7%

- Following a sharp decline in overall arts attendance that occurred from 2002-2008, participation rates held steady from 2008-2012, and have increased into 2017.
- Changes in the U.S. demographic composition appear to have contributed to attendance in performing arts attendance. Still, various subgroups of Americans have maintained or increased attendance rates for individual art forms.

Table W – Percentage of U.S. Adults Attending Visual Arts Activities and Events

	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Art Museums/Galleries	22.7%	21.0%	23.7%	-1.7%	+2.7%
Parks/Historical Buildings	24.5%	22.4%	28.3%	-2.1%	+5.9%
Craft/Visual Arts Festivals	24.9%	23.9%	23.8%	-1.0%	-0.1%

- Visual arts attendance has declined significantly from 2002 to 2012 although has rebounded in 2017.

Reading Books and Literature

Table X – Reading Activity

	2008	2012	2017	Rate of Change	
				2008-2012	2012-2017
Read any Book, non-required	54.3%	54.6%	52.7%	+0.3%	-1.9%
Literature	50.2%	47.0%	44.2%	-3.2%	-2.8%
Novels and Short Stories	47.0%	45.2%	41.8%	-1.8%	-3.4%
Plays	2.6%	2.9%	3.7%	+0.3%	+0.8%
Poetry	8.3%	6.7%	11.7%	-1.6%	+5.0%

Consuming Art Through Electronic Media

Table Y – Percentage of U.S. Adults Who Used Electronic Media to Consume Books or other Artistic, Arts-Related, and Literary Content Arts: 2017

	Percentage
Used Electronic Media to Consume Artistic or Arts Related Content	74%
Read Any Books Using Electronic Media	23%
Listen to Any Audiobooks	16%

Table Z – Percentage of Adults Who Used Electronic Media to Consume Art in the past 12 Months

	Percentage
Other Music ⁵	65%
Classical Music or Opera	21%
Jazz	20%
Programs Info. About Book Writers	19%
Lain, Spanish, or Salsa	19%
Theater Productions (musical or stage play) ⁶	16%
Paintings, Sculpture, Pottery or Other Visual Art	16%
Dance Performances or programs	14%
Programs and Info. About Visual Arts	14%

Making and Sharing Art

Table AA – Percentage of American Adults Who Made Art in the Last 12 Months: 2017

	Percentage
Any Art	54%
Performing Arts	40%
Visual Arts	33%
Creative Writing	7%

Performing Arts include singing, playing any musical instrument, dancing, or acting.
 Visual Arts include painting, drawing, sculpting, or making prints, taking photographs, creating films, creating animations, digital arts, making pottery, ceramics or jewelry, doing leatherwork, metalwork or woodwork, weaving, crocheting, quilting, knitting or sewing, scrapbooking, etc.
 Creative Writing includes fiction, nonfiction, poetry or plays.

Table BB – Percentage of American Adults Who Did Performing Arts

	Percentage
Singing	25%
Dancing	24%
Playing Musical Instrument	11%
Creating or Performing Music in Other Ways	3%
Acting	2%
Using Electronic Media to Edit or Remix Music	2%

⁵ Rock, pop, country, folk, rap or hip-hop

⁶ Musicals, plays or information about theatre.

Table CC – Percentage of American Adults Who Did Visual Arts

	Percentage
Taking Photographs	14%
Painting, Drawing, Sculpting, or Making Prints	13%
Weaving, Crocheting, Quilting, Needleworking, Knitting or Sewing	12%
Editing Photographs	10%
Doing Scrapbooking, Origami, or Other Paper-Based Art	7%
Doing Leatherwork, Metalwork, or Woodwork	7%
Creating Films or Videos	5%
Making Pottery, Ceramics, or Jewelry	4%
Designing or Creating Animations, Digital Art, Computer Graphics or Video Games	3%

Table DD – Among Adults Who Made Art, Percentage Who Did So At Least Once a Week

	Percentage
Sing	70.2%
Use Electronic Media to Edit or Remix Music	48.5%
Play Any Musical Instrument	46.6%
Take Photographs	45.2%
Edit Photographs	38.5%
Create or Perform Any Music In Other Ways	37.5%
Creating Writing	34.3%
Design or Create Animations, Digital Art, Computer Graphics or Video Games	32.2%
Weave, Crochet, Quilt, Needlework, Knit or Sew	26.2%
Create Films or Videos	22.9%
Dance	22.6%
Paint, Draw, Sculpt or Make Prints	22.5%
Act	20.8%
Do Leatherwork, Metalwork, or Woodwork	20.6%
Do Scrapbooking, Origami, or Other Paper-Based Art	14.0%
Make Pottery, Ceramics or Jewelry	9.8%

Participating in Arts Learning

Table EE – Percentage of Adults Who Took Formal Art Lessons or Classes in Past 12 Months

	Percentage
Any Type of Art	9.5%
Visual Arts ⁷	3.6%
Music	2.7%
Art History or Appreciation	2.1%
Dance	1.9%
Creative Writing	1.7%
Computer Animation or Digital Art	1.8%
Photography or Filmmaking	1.6%
Acting or Theatre	0.6%

Table FF – Percentage of Adults Who Took Informal Art Lessons or Classes in Past 12 Months

	Percentage
Any Type of Art	17.2%
Music	10.3%
Visual Arts	6.3%
Photography or Filmmaking	5.3%
Art History or Appreciation	4.9%
Dance	3.5%
Creative Writing	3.1%
Acting or Theatre	1.8%
Computer Animation or Digital Art	N/A

⁷ Drawing, Painting, Pottery, Weaving or Graphic Design

Trends Information



The following trends analysis has been developed for the City of Brentwood. The document serves two purposes, the first is to provide insight for the master planning process, the second is for the CAPRA accreditation process.

Market Potential Index for Adult Participation: The following information illustrates participation rates for adults in a wide variety of activities both indoor and outdoor. This is not to suggest the City should or should not offer these activities but rather outlines the adult participation market.

Table P – Market Potential Index (MPI) for Part. in Activities in Primary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI ¹
Aerobic Exercise	612	9.0%	108
Baseball	179	2.6%	102
Basketball	373	5.5%	96
Bicycle Riding	1,116	16.4%	136
Exercise Walking	2,652	39.1%	115
Football (tackle)	175	2.6%	108
Ice Skating	218	3.2%	144
Pilates	232	3.4%	122
Running/Jogging	1,041	15.3%	136
Soccer	229	3.4%	107
Softball	108	1.6%	98
Swimming	1,200	17.7%	117
Tennis	352	5.2%	136
Volleyball	195	2.9%	122
Weightlifting	1,215	17.9%	127
Yoga	1,024	15.1%	138

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by MRI-Simmons in a nationally representative survey of U.S. households. ESRI forecasts for 2023 and 2028.

¹ An MPI (Market Potential Index) measures the relative likelihood of the adults or household in specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the US. An MPI of 100 represents the US average.

Participation Trends

It is possible to project possible participation in recreation and sport activities. On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. The data is collected in one year and the report is issued in June of the following year. This information provides the data necessary to overlay the rate of participation onto the Primary Service Area (City of Brentwood) population to determine market potential.

B*K takes the national average and combines that with participation percentages of the Primary Service Area based upon age distribution, median income, region, and National number. Those four percentages are averaged together to create a unique participation percentage for the service area. This participation percentage, when applied to the population of Brentwood, provides an idea of the market potential for recreation activities.

Table A –Participation Rates in Brentwood

	Age	Income	Region	Nation	Average
Aerobic Exercise	16.0%	16.5%	20.6%	15.8%	17.2%
Baseball	3.5%	5.0%	3.3%	3.7%	3.9%
Basketball	7.6%	7.8%	6.1%	7.6%	7.3%
Bicycle Riding	14.0%	15.5%	15.4%	14.6%	14.9%
Cheerleading	2.1%	1.5%	0.9%	1.0%	1.4%
Exercise Walking	37.2%	40.4%	37.6%	37.3%	38.1%
Exercise w/ Equipment	19.6%	20.8%	15.6%	19.1%	18.8%
Football (tackle)	2.1%	2.5%	3.2%	2.2%	2.5%
Gymnastics	1.6%	2.3%	1.4%	1.8%	1.8%
Hockey (ice)	1.0%	0.8%	2.5%	1.0%	1.3%
Ice/Figure Skating	2.6%	3.2%	3.6%	2.7%	3.0%
Lacrosse	0.8%	0.4%	0.3%	0.8%	0.6%
Pickleball	2.1%	2.7%	3.4%	2.1%	2.6%
Pilates	2.2%	2.3%	1.2%	2.0%	1.9%
Running/Jogging	15.6%	17.6%	13.7%	14.8%	15.4%
Skateboarding	2.0%	2.3%	2.3%	2.1%	2.2%
Soccer	4.4%	5.2%	4.6%	4.6%	4.7%
Softball	3.1%	4.3%	3.6%	3.1%	3.5%
Swimming	15.7%	19.0%	18.1%	16.4%	17.3%
Tennis	4.7%	5.7%	3.1%	4.7%	4.5%
Volleyball	3.7%	4.7%	4.4%	3.8%	4.2%
Weightlifting	13.2%	12.8%	12.1%	12.7%	12.7%
Workout @ Club	10.2%	10.2%	8.8%	9.7%	9.7%
Wrestling	1.0%	0.9%	0.9%	1.0%	0.9%
Yoga	11.0%	10.8%	7.3%	10.4%	9.9%
Did Not Participate	20.4%	18.8%	20.6%	20.6%	20.1%

Age: Participation based on individuals ages 7 & Up of Brentwood.
Income: Participation based on the 2022 estimated median household income in the City.
Region: Participation based on regional statistics (West North Central).
National: Participation based on national statistics.
Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-A plus the 2020 census information and census estimates for 2023 and 2028 (over age 7) the following comparisons are available.

Table B –Participation Growth or Decline for Indoor Activities in Brentwood

	Average	2020 Population	2023 Population	2028 Population	Difference
Aerobic Exercise	17.2%	1,305	1,322	1,319	14
Baseball	3.9%	294	298	297	3
Basketball	7.3%	551	559	557	6
Bicycle Riding	14.9%	1,127	1,142	1,139	12
Cheerleading	1.4%	105	106	106	1
Exercise Walking	38.1%	2,888	2,926	2,920	32
Exercise w/ Equipment	18.8%	1,422	1,440	1,437	16
Football (tackle)	2.5%	189	191	191	2
Gymnastics	1.8%	134	136	135	1
Hockey (ice)	1.3%	101	102	102	1
Ice/Figure Skating	3.0%	230	233	232	3
Lacrosse	0.6%	43	43	43	0
Pickleball	2.6%	195	198	197	2
Pilates	1.9%	146	148	147	2
Running/Jogging	15.4%	1,168	1,183	1,181	13
Skateboarding	2.2%	166	168	167	2
Soccer	4.7%	356	360	360	4
Softball	3.5%	267	271	270	3
Swimming	17.3%	1,310	1,327	1,324	14
Tennis	4.5%	344	349	348	4
Volleyball	4.2%	315	319	319	3
Weightlifting	12.7%	963	976	974	11
Workout @ Club	9.7%	737	747	746	8
Wrestling	0.9%	72	73	73	1
Yoga	9.9%	749	759	757	8
Did Not Participate	20.1%	1,524	1,544	1,540	17

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The “Did Not Participate” statistics refers to all 65 activities outlined in the NSGA 2022 Survey Instrument.

Participation by Race & Ethnicity: When the NSGA collects data, they use a series of data points to cross-tabulate the information. A data point that is commonly used is participate by race (African American) and ethnicity (Hispanic). B*K considers both race and ethnicity to be significant if it is greater than 10%. Within Brentwood the African American (4.9%) and Hispanic (3.9%) populations are significant in that they would not greatly impact rates of participation.

Table C –Participation by Race & Ethnicity in Brentwood

	Brentwood Average	National Average	African American Nat'l Average	Hispanic Nat'l Average
Aerobic Exercise	17.2%	15.8%	13.1%	17.8%
Baseball	3.9%	3.7%	2.4%	4.8%
Basketball	7.3%	7.6%	12.0%	9.4%
Bicycle Riding	14.9%	14.6%	11.8%	13.3%
Cheerleading	1.4%	1.0%	1.5%	1.1%
Exercise Walking	38.1%	37.3%	24.4%	32.1%
Exercise w/ Equipment	18.8%	19.1%	13.6%	17.2%
Football (tackle)	2.5%	2.2%	4.5%	2.0%
Gymnastics	1.8%	1.8%	1.8%	2.3%
Hockey	1.3%	1.0%	0.1%	1.0%
Ice/Figuring Skating	3.0%	2.7%	1.2%	2.7%
Lacrosse	0.6%	0.8%	0.5%	0.5%
Pickleball	2.6%	2.1%	1.0%	1.7%
Pilates	1.9%	2.0%	1.7%	2.3%
Running/Jogging	15.4%	14.8%	12.9%	16.8%
Skateboarding	2.2%	2.1%	2.8%	3.1%
Soccer	4.7%	4.6%	4.0%	7.2%
Softball	3.5%	3.1%	2.0%	2.9%
Swimming	17.3%	16.4%	8.6%	18.2%
Tennis	4.5%	4.7%	3.3%	4.7%
Volleyball	4.2%	3.8%	3.7%	4.6%
Weightlifting	12.7%	12.7%	10.7%	13.2%
Workout @ Club	9.7%	9.7%	7.0%	9.9%
Wrestling	0.9%	1.0%	1.6%	1.5%
Yoga	9.9%	10.4%	7.5%	10.3%
Did Not Participate	20.1%	20.6%	22.7%	19.8%

In Table-C, the percentages highlighted in green are those that are equal to or greater than the national figure, those in red are less than the national figure.

National Participation Ranking: The following table highlights the national rank and participation in millions of the activities identified in this report.

Table D – National Participation Ranking and Total Participation

Activity	National Rank	National Participation (in millions)
Exercise Walking	1	113.9
Exercise w/ Equipment	4	58.2
Swimming	6	50.2
Running/Jogging	7	45.0
Bicycle Riding	8	44.6
Weightlifting	10	38.8
Yoga	11	31.7
Workout @ Club	13	29.6
Basketball	15	23.2
Tennis	21	14.2
Soccer	22	14.1
Volleyball	26	11.7
Baseball	27	11.2
Softball	30	9.4
Ice/Figure Skating	31	8.3
Football (tackle)	34	6.6
Skateboarding	35	6.5
Pickleball	38	6.4
Pilates	39	6.2
Gymnastics	43	5.3
Hockey	51	3.2
Wrestling	52	3.1
Cheerleading	53	3.1
Lacrosse	56	2.5

Participation by Age Group: The following chart identifies the top 3 age groups participating in the activity. It is important to note that NSGA only tracks participation in age 7 and up.

Table E –Participation Growth or Decline for Indoor Activities in Brentwood

	Highest Rate of Participation	Second Highest Rate of Participation	Third Highest Rate of Participation
Aerobic Exercise	35-44	25-34	45-54
Baseball	7-11	12-17	25-34
Basketball	12-17	25-34	18-24
Bicycle Riding	55-64	45-54	12-17
Cheerleading	12-17	7-11	18-24
Exercise Walking	55-64	65-74	45-54
Exercise w/ Equipment	25-34	45-54	55-64
Football (tackle)	12-17	18-24	7-11
Gymnastics	7-11	12-17	25-34
Hockey	25-34	12-17	7-11
Ice/Figure Skating	7-11	18-24	12-17
Lacrosse	12-17	7-11	18-24
Martial Arts/MMA	7-11	25-34	12-17
Pickleball	12-17	65-74	18-24
Pilates	25-34	35-44	45-54
Running/Jogging	25-34	35-44	45-54
Skateboarding	12-17	18-24	7-11
Soccer	7-11	12-17	25-34
Softball	12-17	7-11	25-34
Swimming	55-64	12-17	7-11
Tennis	25-34	35-44	12-17
Volleyball	12-17	25-34	18-24
Weightlifting	25-34	45-54	35-44
Workout @ Club	25-34	35-44	45-54
Wrestling	12-17	25-34	7-11
Yoga	25-34	35-44	45-54
Did Not Participate	45-54	55-64	65-74

National Participation Growth of Decline:

Table F –Participation Growth or Decline for Activities in Brentwood

Activity	5 Year Trend	Activity	10 Year Trend
Pickleball	+220.0%	Pickleball	+276.5%
Skateboarding	+20.4%	Skateboarding	+30.0%
Bicycle Riding	+20.2%	Bicycle Riding	+25.3%
Tennis	+16.4%	Weightlifting	+24.0%
Volleyball	+15.8%	Yoga	+22.4%
Wrestling	+10.7%	Exercise Walking	+18.3%
Pilates	+8.8%	Volleyball	+15.8%
Exercise Walking	+7.4%	Ice/Figure Skating	+15.3%
Swimming	+6.6%	Pilates	+12.7%
Weightlifting	+6.3%	Tennis	+12.7%
Yoga	+4.3%	Swimming	+10.3%
Exercise w/ Equipment	+3.0%	Soccer	+10.2%
Soccer	+2.2%	Exercising w/ Equipment	+9.6%
Running/Jogging	+1.8%	Running/Jogging	+7.1%
Hockey (ice)	-3.0%	Gymnastics	+3.9%
Softball	-3.1%	Wrestling	+0.0%
Ice/Figure Skating	-4.6%	Baseball	-4.3%
Basketball	-6.8%	Softball	-6.0%
Baseball	-7.4%	Hockey (ice)	-8.6%
Lacrosse	-10.7%	Basketball	-9.0%
Football (tackle)	-10.8%	Lacrosse	-10.7%
Cheerleading	-11.4%	Cheerleading	-11.4%
Gymnastics	-11.7%	Football (tackle)	-12.0%
Workout @ Club	-21.3%	Workout @ Club	-13.2%

Arts Participation: It is important to note that participation rates in non-sport activities exist. While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation’s cultural vitality. One way is to chart the public’s involvement with arts events and other activities over time. The NEA’s Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States. This survey has been administered every 5 years since 1982 and tracks various arts activities that Americans (aged 18 and over) report having done in the course of a year. It also asks questions about adults’ preferences for different kinds of music, and it seeks to understand participation in non-arts leisure events such as sports and exercise, outdoor activities and civic and social affairs.

The participation numbers for these activities are national numbers and the information falls into the following categories:

- Attending Arts Activities
- Reading Books and Literature
- Consuming Art through Electronic Media
- Making and Sharing Art
- Participating in Arts Learning

A trend that is important to understand is that more and more, parks and recreation departments are becoming the home for arts and enrichment programming in communities. Through no fault of their own many school districts have to make the hard decision to limit or eliminate art, music, theater and the like from their curriculum. Subsequently, it has created an opportunity for many agencies to provide those programs.

Important art footnotes and key take away findings from the 2022 survey instrument:

- For reference, the data from the survey was collected through July 2022. While this period was beyond the full impact and closures of COVID-19, many Americans had and continue to alter their behavior based on those experiences. Arts and cultural activities and facilities were among the hardest hit by COVID and their slow recovery may have impacted the results.
- More than 52% of adults created and/or performed art in 2022, which is down slightly from 2017 of 54%. While adults may not create or perform, they do consume at a high rate with 75% consuming some form of art through media.
- In comparison to the 2017 findings the 2022 findings are negative.
 - Overall, the percentage of adults who attended at least one arts activity declined in 2022.

- Adults attending visual or performing arts activities decreased by an average of 3.3%.
- An area of substantial decline in growth for the 2022 findings is adults attending Visual Arts Activities and Events.
 - Craft and visual arts festivals have seen the largest decrease, 6.7%.
 - Prior to 2022, these attendance numbers were increasing. It seems that Covid-19 played a part in this change.
- The top three forms of arts attendance in the performing arts are:
 - Outdoor performing arts festivals.
 - Musicals.
 - Jazz performances.

In the Fall of 2023, Americans for the Arts released the findings of The Arts & Economic Prosperity 6 (AEP6) study. This study, which was first published in 1994, provides detailed findings on the economic contributions of the nonprofit arts and culture industry in the United States. According to the study, arts and culture generated \$151.7 billion in economic activity in 2022. This includes \$73.3 billion in spending by arts and culture organizations and \$78.4 billion in event-related spending by arts and culture audiences. The study also found that the arts and culture industry supported 2.6 million jobs, provided \$101 billion in personal income to residents, and generated \$29.1 billion in government tax revenue.

The economic impact of the arts goes beyond just the direct spending by organizations and audiences. Vibrant arts and culture communities attract visitors who spend money and help local businesses thrive. The study found that one-third of attendees at arts events were from outside the county in which the event took place, and they spent an average of \$60.57 per person. These are dollars that are spent on items such as food and beverage, hotels, and merchandise. This visitor spending is vital income for local businesses. Additionally, the study highlights the social contributions of the arts, with 89% of respondents agreeing that the activity or venue they were attending was a source of neighborhood pride, and 86% saying they would feel a sense of loss if that activity or venue was no longer available.

These findings from AEP6 demonstrate that the arts and culture industry is a critical economic driver of vibrant communities. The industry not only generates significant economic activity but also supports millions of jobs, provides income to residents, and contributes to government tax revenue. The study also emphasizes the importance of arts and culture in attracting visitors and creating a sense of pride and identity in communities. These economic contributions highlight the need for increased funding and support for the arts to ensure the continued growth and vitality of this important industry.

Attending Arts Activities

Table A – Percentage of U.S. Adult Attending a Performing Arts Activity at Least Once in the Past 12-Months

Music	2012	2017	2022	Rate of Change	
				2012-2022	2017-2022
Outdoor Performing Arts Festival	20.8%	24.2%	18.7%	-2.1%	-5.5%
Jazz	8.1%	8.6%	6.3%	-1.8%	-2.3%
Classical Music	8.8%	8.6%	4.6%	-4.2%	-4.0%
Latin Music	5.1%	5.9%	3.9%	-1.2%	-2.0%
Opera	2.1%	2.2%	0.7%	-1.4%	-1.5%

Plays	2012	2017	2022	Rate of Change	
				2012-2022	2017-2022
Musical Plays	15.2%	16.5%	10.3%	-4.9%	-6.2%
Non-Musical Plays	8.3%	9.4%	4.5%	-3.8%	-4.9%

Dance	2012	2017	2022	Rate of Change	
				2012-2022	2017-2022
Other Dance	5.6%	6.3%	3.3%	-2.3%	-3.0%
Ballet	2.7%	3.1%	2.0%	-0.7%	-1.1%

- Following a minimal increase in almost all arts attendance that occurred from 2012-2017, participation rates decreased from 2017-2022.
- Changes in the U.S. demographic composition appear to have contributed to attendance in performing arts attendance. Still, various subgroups of Americans have decreased attendance rates for individual art forms. Covid-19 played its role in the decrease in participation as well.
- The most popular site to attend in-person arts events was an open-air facility (parks, pavilions, amphitheatres) at 17.1%. The next venue is restaurants, bars, night clubs and coffee shops (10.3%) with the remainder fairly equal including schools, churches and community centers and libraries.
- Those who attended learned about the event most frequently through social media (17.0%) then through friends (14.7%) with traditional media next (11.3%).

Table B – Percentage of U.S. Adults Attending Visual Arts Activities and Events

	2012	2017	2022	Rate of Change	
				2012-2022	2017-2022
Parks/Historical Buildings	22.4%	28.3%	26.0%	+3.6%	-2.3%
Art Museums/Galleries	21.0%	23.7%	17.7%	-3.3%	-6.0%
Craft/Visual Arts Festivals	23.9%	23.8%	17.1%	-6.8%	-6.7%

- Art Museums/Galleries and Parks/Historical Buildings attendance has increased from 2012 to 2017 but decreased in 2022.
- Craft/Visual Arts Festivals have seen a decline between 2012-2022.

Reading Books and Literature

Table C – Reading Activity

	2012	2017	2022	Rate of Change	
				2012-2022	2017-2022
Read any Book, non-required	54.6%	52.7%	48.5%	-6.1%	-4.2%
Literature	47.0%	44.2%	39.6%	-7.4%	-4.6%
Novels and Short Stories	45.2%	41.8%	37.6%	-7.6%	-4.2%
Plays	2.9%	3.7%	2.4%	-0.5%	-1.3%
Poetry	6.7%	11.7%	9.2%	+2.5%	-2.5%

Table D –Percent of U.S. Adults Who Read and/or Listened to Books in 2022

	Percentage
Read Books and/or Listened to Audiobooks	51.9%
Read Books	48.5%
Listened to Audiobooks	18.5%

Table E –Percentage of U.S. Adults Who Read Literary Works and/or Listened to Them via Streaming, Broadcasts, or Recordings in 2022

	Read	Listened via Media	Read and/or Listened via Media
Novels or short stories	37.6%	17.6%	43.2%
Poetry	9.2%	4.8%	11.5%
Plays	2.4%	N/A	N/A

- Read any Book (non-required), Literature, and Novels and Short Stories have seen a decline between 2012 and 2022. In 2022, fewer than 50 percent of adults read any book (in print or electronically) in the previous 12 months. This rate is four and six points lower than in 2017 and 2012.
- Plays and Poetry saw an increase between 2012 to 2017, but decreased 2017 to 2022.

Consuming Art Through Electronic Media

Table F –Percent of U.S. Adults Who Consumed Art via Electronic or Digital Media

	2017	2022	Rate of Change
Watched or listened to other kinds of music	65.2%	63.0%	-2.2%
Watched or listened to documentaries of any kind	n/a	37.0%	n/a
Watched or listened to programs, podcasts, or other video or audio content about music, dance, or theater	n/a	18.4%	n/a
Watched or listened to jazz music	20.0%	16.3%	-3.7%
Watched or listened to Latin, Spanish, or salsa music	18.5%	16.8%	-2.7%
Watched or listened to classical music or opera	20.6%	14.3%	-6.3%
Watched or listened to programs, podcasts, or other video or audio content about books or writers	19.1%	13.6%	-5.5%
Viewed art via device	16.0%	11.1%	-5.9%
Watched or listened to theater productions	16.2%	11.0%	-5.2%
Watched or listened to dance performances	14.1%	9.9%	-4.2%
Watched or listened to programs, podcasts, or other video or audio content about the visual arts	14.0%	9.0%	-5.0%
Viewed or interacted with an art exhibit or performance via device in a museum, theater, or concert hall	16.0%	7.1%	-8.9%

- Sixty-three percent of adults used media in 2022 to listen to music other than jazz music, Latin, Spanish, or salsa music, or classical music or opera.
- In 2022, 14 percent of adults consumed programs or podcasts about books or writers in 2022.

Making and Sharing Art

Table G – Percent of U.S. Adults Who Performed or Created Art, by Selected Activities

	2017	2022	Rate of Change
Do social dancing, including dancing at weddings, clubs, or other social settings	24.0%	21.8%	-2.2%
Sing alone, in a social gathering, or in a group or choir	25.4%	20.2%	-4.2%
Take photographs as an artistic activity	13.8%	13.3%	-0.5%
Do weaving, crocheting, quilting, needlepoint, knitting, or sewing	11.7%	11.7%	—
Play a musical instrument	10.9%	11.4%	+0.5%
Create other visual art	13.4%	10.7%	-2.4%
Create leatherwork, metalwork, or woodwork	6.6%	9.0%	+2.4%
Do creative writing, such as fiction, non-fiction, poetry, or plays	6.6%	6.9%	-0.3%
Create any performance or work of visual art using a computer or mobile device	3%	4.5%	+1.5%
Create pottery, ceramics, or jewelry	4.1%	4.4%	-0.3%
Create films or videos as an artistic activity	5.2%	4.0%	-1.2%
Play a musical instrument with one or more partners, a band, orchestra, or other music group	3.9%	3.0%	-0.9%
Perform or practice dance	3.5%	2.0%	-1.5%
Design, code, or create any games, software, or tools	n/a	2.0%	—
Do acting	2.3%	1.6%	-0.7%

- The proportion of adults singing declined from 2017 to 2022, by five percentage points.
- Social dancing took the place of singing as the most popular activity across all forms of personal arts performance and creation.

Participating in Arts Learning

Table H –Percent of U.S. Adults Who Learned an Art Form 2022

	Who Took Classes or Lessons	Who Learned by Other Means	Who Learned Either through Classes/Lessons or Other Means
Any Arts Subject	11.8%	25.5%	29.1%
Music	3.8%	12.1%	14.2%
Dance	2.1%	6.7%	8.0%
Photography or filmmaking	1.8%	6.6%	7.4%
Other visual arts	2.6%	6.4%	7.1%
Art history or art or music appreciation	2.1%	5.8%	6.9%
Creative coding, computer animation, or digital art	2.3%	4.1%	4.8%
Creative writing	1.9%	3.6%	4.7%
Acting or theater	0.8%	1.7%	2.1%

- Just under 4 percent of adults learned vocal or instrumental music through classes or lessons, while 12 percent learned through other means (e.g., through friends, as part of a family tradition, or teaching oneself).
- Six percent of adults took classes or lessons in photography, while 2 percent learned through other means.

Whether through classes/lessons or other means, nearly 5 percent of adults learned about computer animation, creative coding, or digital art making.

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