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THE U.S. LEISURE MARKET

1.1 Expenditures on Leisure Activities

Richard K. Miller & Associates (RKMA, www.rkma.com) estimates the U.S. entertainment and leisure market at $2.5 trillion. For comparison: U.S. retail sales were $5.1 trillion in 2013, according to the U.S. Department of Commerce; national healthcare expenditures were $3.0 trillion in 2013, according to the Centers for Medicare & Medicaid Services.

The following are RKMA estimates of the major components of the leisure market:

- Adult entertainment: $26 billion
- Art: $40 billion
  (source: Art Market Monitor)
- Bars and nightclubs: $20 billion
  (source: National Restaurant Association)
- Bicycles: $6 billion
  (source: National Bicycle Dealers Association)
- Casino/parimutuel wagering: $68 billion
  (source: American Gaming Association)
- Collecting: $70 billion
  (source: Investors Business Daily)
- Consumer books: $23 billion
  (sources: U.S. Department of Commerce)
- Consumer electronics: $165 billion
  (source: Consumer Electronics Association)
- Craft and hobby supplies: $31 billion
  (sources: Craft & Hobby Association)
- Cultural, the not-for-profit arts industry: $135 billion
  (source: Americans for the Arts)
- Dining out (casual and fine dining only): $212 billion
  (source: National Restaurant Association)
- Equestrian: $102 billion
  (source: American Quarter Horse Association)
- Event rentals: $3 billion
  (source: The Wall Street Journal)
- Fantasy sports: $2 billion
  (source: Fantasy Sports Trade Association)
• Festivals: $ 25 billion
  (source: International Festivals & Events Association)
• Fishing: $ 42 billion
  (source: U.S. Fish and Wildlife Service)
• Gardening: $ 30 billion
  (source: National Gardening Association)
• Golf: $ 34 billion
  (source: National Golf Foundation)
• Health and fitness clubs: $ 18 billion
  (source: International Health, Racquet & Sportsclub Association)
• Hunting: $ 34 billion
  (source: U.S. Fish and Wildlife Service)
• Lotteries: $ 28 billion
  (source: North American Association of State and Provincial Lotteries)
• Motion picture and sound recording industries: $ 58 billion
  (source: SRI International)
• Motorcycles: $ 18 billion
  (source: Packaged Facts)
• Museums: $ 21 billion
  (source: American Alliance of Museums)
• Music concerts: $ 5 billion
  (source: Pollstar)
• Musical instruments and products: $ 7 billion
  (source: Music Trades)
• National Parks: $ 12 billion
  (source: U.S. Park Service)
• Pets: $ 53 billion
  (source: American Pet Products Association)
• Photography: $ 17 billion
  (sources: Photo Marketing Association, Bureau of Economic Analysis)
• Premium video (pay TV, mobile video, DVD, broadband video, and theater/box office receipts): $182 billion
  (source: iSuppli)
• Private Clubs: $ 27 billion
  (source: IBIS World)
• Radio (ad-supported, not direct consumer spending): $ 17 billion
  (source: Radio Advertising Bureau)
• Recreational boating: $122 billion
  (source: National Marine Manufacturers Association)
• Recreation vehicles: $ 13 billion
  (source: Recreation Vehicle Industry Association)
• Social caterers: $ 9 billion
  (sources: National Restaurant Association, Technomic)
• Spas: $ 15 billion
  (source: International Spa Association, First Research)
• Specialty auto accessories: $ 29 billion
  (source: Specialty Equipment Market Association)
There is some overlap among the above expenditures. Many leisure activities are included in more than one category. This is somewhat offset by the fact that all types of leisure expenditures – hobby farming and wellness activities, for example – are not included in the list.

Based on published statistics by the U.S. government, leisure expenditures are significantly less than the $2.5 trillion figure assessed here. According to The Bureau of Economic Analysis (BEA, www.bea.gov), Americans spend $745 billion on leisure pursuits. This figure is significantly lower because the BEA classifies many leisure expenditures elsewhere. Travel and tourism, for example, is considered a separate category. Auto customizing and collecting, as another example, are classified as transportation expenditures. Collectible purchases, pets, videos, and various other leisure-related purchases are classified as retail expenditures.

1.2 Americans’ Use of Time

The American Time Use Survey (ATUS, www.bls.gov/tus/), first published in 2005 by the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor and updated annually, is the most recognized source for data on leisure use of time. The ATUS reporting on activities in 2013 was published in June 2014.

Use-of-time data is skewed because most people do not participate in all types of activities. ATUS accounts for this by quantifying for each type of activity the average amount of time spent by all consumers and by only those who participate in an activity.

According to the ATUS, American adults’ 24-hour day in 2013 was distributed as follows:
By gender, adults’ 24-hour day is distributed as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>All Consumers</th>
<th>Active Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sleeping and personal care</td>
<td>9.54 hours</td>
<td>9.31 hours</td>
</tr>
<tr>
<td>Leisure and sports</td>
<td>5.26 hours</td>
<td>5.52 hours</td>
</tr>
<tr>
<td>Working and work-related activities</td>
<td>3.46 hours</td>
<td>8.01 hours</td>
</tr>
<tr>
<td>Household activities</td>
<td>1.78 hours</td>
<td>2.39 hours</td>
</tr>
<tr>
<td>Eating and drinking</td>
<td>1.23 hours</td>
<td>1.27 hours</td>
</tr>
<tr>
<td>Purchasing goods and services</td>
<td>0.75 hours</td>
<td>1.74 hours</td>
</tr>
<tr>
<td>Caring for/helping household members</td>
<td>0.53 hours</td>
<td>2.07 hours</td>
</tr>
<tr>
<td>Educational activities</td>
<td>0.48 hours</td>
<td>5.98 hours</td>
</tr>
<tr>
<td>Organizational, civic, religious</td>
<td>0.32 hours</td>
<td>2.31 hours</td>
</tr>
<tr>
<td>Caring for/helping non-household members</td>
<td>0.19 hours</td>
<td>1.68 hours</td>
</tr>
<tr>
<td>Telephone calls, mail, email</td>
<td>0.15 hours</td>
<td>0.72 hours</td>
</tr>
<tr>
<td>Other activities</td>
<td>0.31 hours</td>
<td>1.77 hours</td>
</tr>
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</table>

The following is a summary of the leisure assessment of the 2014 ATUS:

- On an average day, 95% of people ages 15 and over engaged in some sort of leisure activity, such as watching TV, socializing, or exercising. Of those who engaged in leisure activities, men spent more time in these activities (5.9 hours) than did women (5.2 hours).
- Watching TV was the leisure activity that occupied the most time (2.8 hours per day), accounting for about half of leisure time, on average, for those ages 15 and over. Socializing, such as visiting with friends or attending or hosting social events, was the next most common leisure activity, accounting for nearly three-quarters of an hour per day.
- Men were more likely than women to participate in sports, exercise, or recreation on any given day – 21% compared with 16%. Men also spent more time in these activities than did women – 1.9 hours compared with 1.3 hours.
- On an average day, adults ages 75 and over spent 7.5 hours engaged in leisure
activities – more than any other age group; 35-to 44 year-olds spent 4.3 hours engaged in leisure and sports activities – less than other age groups.

- Time spent reading for personal interest and playing games or using a computer for leisure varied greatly by age. Individuals ages 75 and over averaged 1.0 hours of reading per weekend day and 20 minutes playing games or using a computer for leisure. Conversely, individuals ages 15-to-19 read for an average of 4 minutes per weekend day and spent 52 minutes playing games or using a computer for leisure.
- Employed adults living in households with no children under age 18 engaged in leisure activities for 4.5 hours per day, nearly an hour more than employed adults living with a child under age 6.

According to the ATUS, Americans spend, on average, 5.25 hours per day engaged in leisure activities, which represents about ⅛ of their time. Daily leisure time is distributed by demographics as follows:

**Gender**
- Men: 5.41 hours
- Women: 4.83 hours

**Age**
- 15-to-19: 5.78 hours
- 20-to-24: 5.10 hours
- 25-to-34: 4.30 hours
- 35-to-44: 4.20 hours
- 45-to-54: 4.67 hours
- 55-to-64: 5.27 hours
- 65 and above: 7.16 hours

**Education/work**
- Less than high school education: 6.07 hours
- High school graduate: 5.37 hours
  - Age 25+ and employed full time: 3.18 hours
- Bachelor’s degree or higher: 4.30 hours
  - Age 25+ and employed full time: 2.98 hours

1.3 **Top 10 Leisure Activities in 2014**

The following were the Top 10 leisure activities in 2014:

**Collecting**
- Virtually everyone collects something. In 2013, 50 million collectors spent $70 billion purchasing items for their collections. Among the most popular collections: art, coins, dolls, and celebrity memorabilia.
Fitness Walking
• In 2013, 115 million Americans (ages six and older) walked as a fitness activity – walking ranked at #1 among all types of recreational activities.

Gardening
• Eighty million households, or 70% of all households, engaged in indoor/outdoor lawn and garden activities in 2013 and spent almost $30 billion in these activities.

Going to Movies
• Cinema box office attendance was approximately 1.25 billion in 2013; receipts were about $10 billion.

Going to the Beach
• When given a choice of destinations for leisure travel, 44% of adults pick one of America’s 3,500 public beaches – this ranks #1 among all types of travel destinations.

Outdoor Activities in Public Parks
• Americans made more than 280 million visits to National Parks and 725 million visits to State Parks in 2013. Visits to city parks numbered in the trillions.

Reading
• 167 million adults, or 73% of all adults, read at least one book in 2013. Among those who read, the median number of books read is four. Women and seniors read the most.

Social Networking
• Among Internet users, 65% of adults and 81% of teens engaged in online social networking in 2013. On any given day, more than 40% of Americans – 128 million people – visit Facebook, the most popular social site.

Travel
• Americans took 1.5 billion trips for leisure in 2013 – spending an estimated $530 billion, which ranks it #1 in spending among all leisure activities. Over 40% of adults traveled on a summer vacation in 2013. Favorite activities for leisure travelers: dining out and shopping.

Watching Television
• Adults and teens spent an average 4.3 hours each day in 2013 watching television, with TV topping all media activities. Few, however, gave TV their undivided attention – three-quarters of viewers multitask while watching – going online, talking on mobile devices, or text messaging while also watching TV.
Other Popular Activities
• Over 40 million people participated in each of the following leisure activities in 2013:
  - Attended a college or professional sports event
  - Attended a fair or festival
  - Attended a music concert
  - Attended the theater/opera/symphony
  - Bicycled
  - Bowled
  - Exercised at a fitness club
  - Fished
  - Hiked and went camping
  - Hunted or went target shooting
  - Played a lottery
  - Played billiards/pool
  - Played video games
  - Visited a casino
  - Visited a museum
  - Visited a theme park
  - Visited a zoo or aquarium
  - Volunteered

1.4 Favorite Leisure Activities
A December 2013 Harris Poll (www.harrisinteractive.com) asked consumers what were their two or three favorite leisure-time activities. Responses by gender were as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching TV</td>
<td>42%</td>
<td>42%</td>
<td>43%</td>
</tr>
<tr>
<td>Reading</td>
<td>37%</td>
<td>48%</td>
<td>24%</td>
</tr>
<tr>
<td>Computer/Internet</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Time with family/friends</td>
<td>18%</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>Watching/going to movies</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Exercise/working out</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Video/computer games</td>
<td>10%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>Walking/running/jogging</td>
<td>8%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Gardening</td>
<td>7%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Concerts/listening to/playing music</td>
<td>7%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Hobby-related activities</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Eating/going to restaurants</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Cooking/baking</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Sewing/needlework/quilting</td>
<td>4%</td>
<td>7%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Attending/watching sports events</td>
<td>4%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Shopping</td>
<td>4%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Sleeping/napping</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>
The Harris Poll found that the number of leisure hours Americans have returned to 20 hours per week after dipping during the economic downturn. America’s leisure time had fluctuated less than one hour annually between 1987 and 2007, consistently remaining between 19 and 20 hours, but dropped to an all-time low of 16 hours from 2008 through 2011. Leisure time was 20 hours per week for both men and women in 2013.

By age, the median time for leisure in 2013 was as follows:

- 18-to-36: 20 hours per week
- 37-to-48: 18 hours per week
- 49-to-67: 21 hours per week
- 68 and older: 30 hours per week
Among those with children in the household, leisure time averaged 15 hours per week while those without children at home enjoyed 25 hours per week of leisure time.

1.5 Leisure Activities For Millennials

A 2013 survey by Urban Land Institute (www.uli.org) asked Millennials their favorite leisure activities; up to five activities could be listed. Responses were as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching TV:</td>
<td>56%</td>
<td>54%</td>
<td>58%</td>
</tr>
<tr>
<td>Spending time with family:</td>
<td>48%</td>
<td>57%</td>
<td>38%</td>
</tr>
<tr>
<td>Spending time with friends:</td>
<td>42%</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>Listening to/playing music:</td>
<td>41%</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Reading:</td>
<td>38%</td>
<td>47%</td>
<td>29%</td>
</tr>
<tr>
<td>Playing computer/video games:</td>
<td>32%</td>
<td>21%</td>
<td>42%</td>
</tr>
<tr>
<td>Online social networking:</td>
<td>30%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Cooking:</td>
<td>22%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Exercise/go to the gym/indoor sports:</td>
<td>21%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Shop in stores:</td>
<td>18%</td>
<td>24%</td>
<td>11%</td>
</tr>
<tr>
<td>Shop online:</td>
<td>18%</td>
<td>21%</td>
<td>16%</td>
</tr>
</tbody>
</table>

1.6 Leisure Time For Seniors

The American Time Use Survey investigated leisure activities of Seniors, finding that this group spends their leisure time much differently than seniors in years past.

“While individual retirees are probably as different as snowflakes, a deep dive into the demographic statistics of retirement shows that broader trends are shaping how retirees seek to enjoy the luxury of time – trends that confirm some popular assumptions about retirement while contradicting others.”

The New York Times, 9/9/13

The following is a summary of the ATUS leisure assessment for Seniors:

- Of the 42 million Americans age 65 or above, 18.7% remain in the labor force, a sharp increase from 13.9% a decade ago. Americans over age 65 who were still
employed typically worked 6½ hours a day.

- People over 65 devoted 6 hours and 40 minutes a day to socializing, relaxing, and at leisure – 2 hours and 45 minutes more than those ages 25-to-54.
- Forty-three percent (43%) of those over 65 read regularly for personal interest, devoting nearly two hours a day. In contrast, only 15% of those ages 25 to 54 read regularly for personal interest, devoting about 80 minutes a day.
- About 20% of Americans over 65 said they participated in sports or performed other exercise regularly, about 90 minutes each occasion. Only 1.6% of Americans older than 65 played golf regularly, devoting 4 hours and 20 minutes on average to the sport on the days they played. Slightly more popular is running or walking on a treadmill or using other cardiovascular equipment – men for 30 minutes on average and women for 45 minutes.
- Almost 90% of older Americans said they regularly watched TV and movies at home, on average for 4 hours and 40 minutes a day. That compares with 3 hours and 10 minutes for Americans ages 25-to-54.
- Eleven percent (11%) of those 65 and over said they regularly played non-computer games, like bridge or Scrabble, averaging 1 hour and 52 minutes of play.

1.7 The Quality of Leisure Time

The easiest way to measure leisure is to take survey data on how many hours a week people spend at work and subtract from 24. Since 1965, the number of hours the average American works for pay has not changed much. By this simple measure, then, leisure has also stayed about the same. The common perception among most people, however, is that their leisure time is shrinking, that they simply do not have enough time to do all of the things they would like to. One reason is that much of consumers’ time is spent performing personal tasks like cooking, cutting the grass, cleaning, etc.

Consumers spend some time off the job in consumption (watching TV, hanging out with friends, reading for pleasure) and some in production (cooking dinner, cleaning the house, doing household repairs). Some activities, like sleeping and eating, fall somewhere in between, while others, including child care and gardening, combine pleasure and production. The difference is that consumers could, in theory, pay someone else to do the production for them. A personal chef or a restaurant can make a meal, for example, but nobody else can play golf or watch television for them.

In a recent study for the Federal Reserve Bank of Boston, Prof. Erik Hurst and economist Mark A. Aguiar used several definitions of leisure in analyzing time-use surveys dating to 1965. The consistent finding was that Americans overall are not, in fact, working as much as they used to. Using the most restrictive definition, which includes only “entertainment/social activities/relaxing” and “active recreation,” the economists found that leisure had increased 5.1 hours a week. Assuming a 40-hour work week, that is like adding six weeks of vacation – an enormous increase. (Note: The study used pre-recession data and thus did not take into account the influence of the economic downturn.)
The increase in leisure time has been particularly striking for women. Women have entered the paid labor force in large numbers since 1965 and have since gained just as much time for leisure as men. The difference is in where the gains came from.

Ninety-seven percent (97%) of men ages 21-to-65 had jobs in 1965, compared with 87% in 2003. That drop accounts for about 60% of the increase in leisure time for men. By contrast, for women the entire gain in their leisure time is coming from declines in non-market work. The time women spend on cooking and cleaning and laundry and other household maintenance has dramatically declined over the last 40 years. Women now spend 11.1 fewer hours a week than they did in 1965 working at home. The biggest drop, 6.2 hours a week, came in cooking and cleaning up after meals – not surprising given the tremendous growth in restaurant and takeout meals and use of microwave ovens.

Then there is the distinction between tasks that are performed out of necessity and those that are by choice – chosen as leisure. There was a time, for example, that people sewed and knitted out of necessity to make clothing needed by the family. Now, needle arts is a leisure activity for most.

1.8 Market Resources
2

AMUSEMENT PARKS

2.1 Market Assessment
There are more than 400 amusement parks and attractions in the United States. According to the International Association of Amusement Parks and Attractions (IAAPA, www.iaapa.org), more than 300 million people visit U.S. amusement parks annually. These visits have an economic impact of $57 billion.

According to IBISWorld (www.ibisworld.com), there are 482 amusement parks in the United States; combined revenue was $15 billion in 2013, a 2.8% increase over the previous year. Revenue is projected to increase 2.4% annually through 2017. Average annual growth was 1.8% from 2007 to 2012.


“America’s passion for amusement parks is white-hot these days, driven by elaborate new attractions, sophisticated pricing schemes, and a desire to get out of the house – but not too far from home.”

Bloomberg Businessweek, 6/3/13

Twenty-three percent (23%) of adults visited a theme park in 2013, about the same percentage as in 2008.

Sixty-seven percent (67%) of teens ages 12-to-17 visited a theme park in 2013, a decrease from 76% of teens who did so five years prior, according to Mintel. This is, in part, due to increasing costs. The typical daily cost of a day at an amusement park increased to $170 in 2013 from $150 in 2008.

According to the World Waterpark Association (www.waterparks.org), annual attendance at U.S. water parks is 70 million to 72 million. Most of the attendance is from free-standing water park visits; however, visits to indoor water park resorts are
There are more than 1,000 water parks in North America, including municipal/city-owned pools with water park features, corporate-owned water parks, independently owned water parks, and indoor/resort-style water parks.

### 2.2 City-by-City Survey

According to a May 2013 assessment by International Demographics (www.themediaaudit.com), 21.1% of adults living in metropolitan areas visited an amusement park within the prior 12 months. The following metropolitan areas have the highest percentage of adults who did so:

- **Orlando, FL:** 49.7%
- **Orange County, CA:** 39.0%
- **Tampa-St. Petersburg, FL:** 38.2%
- **Los Angeles, CA:** 35.6%
- **Sarasota, FL:** 35.1%

Data on the percentages of adults from 90 metropolitan areas that visit theme parks is available online at www.themediaaudit.com/press/local-releases.

### 2.3 Most-Visited Amusement Parks

According to the Themed Entertainment Association (TEA, www.teaconnect.org), the top theme parks in the U.S. based on annual attendance are as follows:

- **Magic Kingdom at Walt Disney World** (Lake Buena Vista, FL): 17.1 million
- **Disneyland** (Anaheim, CA): 16.1 million
- **Epcot at Walt Disney World** (Lake Buena Vista, FL): 10.8 million
- **Disney’s Animal Kingdom at Walt Disney World** (Lake Buena Vista, FL): 9.8 million
- **Disney’s Hollywood Studios at Walt Disney World** (Lake Buena Vista, FL): 9.7 million
- **Islands of Adventure at Universal** (Orlando, FL): 7.7 million
- **Disney’s California Adventure** (Anaheim, CA): 6.4 million
- **Universal Studios Florida** (Orlando, FL): 6.0 million
- **SeaWorld Florida** (Orlando, FL): 5.2 million
- **Universal Studios Hollywood** (Universal City, CA): 5.1 million
- **SeaWorld California** (San Diego, CA): 4.3 million
- **Busch Gardens** (Tampa, FL): 4.3 million
- **Knott’s Berry Farm** (Buena Park, CA): 3.7 million
- **Kings Island** (Kings Island, OH): 3.1 million
- **Cedar Point** (Sandusky, OH): 3.1 million
- **Hershey Park** (Hershey, PA): 2.9 million
- **Busch Gardens** (Williamsburg, VA): 2.7 million
The Top 20 water parks in the U.S. based on annual attendance are as follows:

- Six Flags Magic Mountain (Valencia, CA): 2.7 million
- SeaWorld Texas (San Antonio, TX): 2.6 million
- Typhoon Lagoon at Disney World (Lake Buena Vista, FL): 2.1 million
- Blizzard Beach at Disney World (Lake Buena Vista, FL): 1.9 million
- Aquatica (Orlando, FL): 1.5 million
- Wet 'N Wild (Orlando, FL): 1.2 million
- Schlitterbahn (New Braunfels, TX): 980,000
- Water Country USA (Williamsburg, VA): 723,000
- Adventure Island (Tampa, FL): 644,000
- Noah's Ark Water Park (Wisconsin Dells, WI): 643,000
- Water World (Denver, CO): 559,000
- Schlitterbahn (Galveston, TX): 535,000
- Six Flags White Water (Marietta, GA): 500,000
- Six Flags Hurricane Harbor (Arlington, TX): 500,000
- Raging Waters (San Dimas, CA): 471,000
- Wet 'N Wild (Phoenix, AZ): 461,000
- Splish Splash (Riverhead, NY): 432,000
- Six Flags Hurricane Harbor (Jackson, NJ): 400,000
- Wet 'N Wild Emerald Point (Greensboro, NC): 398,000
- Soak City Cedar Point (Sandusky, OH): 395,000
- Zoombezi Bay (Powell, OH): 374,000
- Water Country (Portsmouth, NH): 367,000

2.4 Market Resources

International Association of Amusement Parks and Attractions, 1448 Duke Street, Alexandria, VA 22314. (703) 836-4800. (www.iaapa.org)


Themed Entertainment Association, 150 E. Olive Avenue, Suite 306, Burbank, CA 91502. (818) 843-8497. (www.teaconnect.org)

World Waterpark Association, 8826 Santa Fe Drive, Suite 310, Overland Park, KS 66212. (913) 599-0300. (www.waterparks.org)
ARTS & CRAFTS

3.1 Crafts

The Craft & Hobby Association (www.craftandhobby.org) estimates annual spending for craft and hobby supplies at $31 billion. The association’s State of the Craft Industry report assessed that 56% of U.S. households, or 62.5 million people, participated in one or more crafting activity in 2013.

The Craft & Hobby Association estimates 12.1 million adults engage in art and drawing as a hobby, spending $1.8 billion doing so.

For the greater majority of today’s crafters, crafting is a labor of love. Long gone are the days when craft-type work was done out of necessity. Most crafters take joy in the entire process of crafting something, from decided what to make to shopping for materials to putting on the finishing touches to a piece. Crafters are driven to create not only for their own personal satisfaction, but also as a way to personalize gift-giving. Some crafters indulge in their hobbies in order to create signature pieces to add uniqueness to their homes.

For some, crafting is a way to relax, others enjoy crafting while bonding with family or friends. There are scores of clubs and associations where hobbyists can bond with like-minded crafters, perhaps to get inspiration and ideas or help if they get stuck on a project.

Capitalizing on the popularity of crafts, retailers have created a welcoming environment for crafters (and a loyal customer base) by offering demonstrations, classes, workshops with guest speakers, and more. Some craft outlets, like the small, independent knit shop or a pottery painting store, offer packages for private parties and other in-store gatherings.

Whatever the craft, from something common, like quilting, to an obscure niche such as crewel, a significant number of craft hobbyists dedicate a great deal of time and money to their beloved art.

An estimated 35 million people sew, 16 million knit and/or needlepoint, and 12 million quilt.

The American Quilter’s Society (www.americanquilter.com) estimates that quilting is a $3.3 billion industry, with some 27 million enthusiasts – a figure which includes collectors, those who enjoy looking at quilts, and quilt makers themselves.

Despite the image of crafts as a hobby for the retired, crafts retailers report that almost 50% of arts and crafts shoppers are ages 35-to-54.

The most popular crafts have scores of books dedicated to the art, numerous magazines, websites, television programs, and more. New crafters use these
resources to bone up on their skills. Many crafters host blogs dedicated to their art, offering fellow crafters tips, patterns, and even items they’ve made for purchase.

Some crafters have turned their hobby into a business. Etsy (www.etsy.com), the dominant online marketplace for artisanal goods, had one million storefronts and sales of $1 billion in 2013.

The following are the largest craft supply chains, ranked by number of U.S. locations as of August 2014:

- Michaels (www.michaels.com): 1,040
- Jo-Ann Stores (www.joann.com): 750
- Hobby Lobby (www.hobbylobby.com): 572

### 3.2 Crafts Fairs and Festivals

According to *Sunshine Artist Magazine*, approximately 10,000 arts and crafts festivals are held annually in the United States.

According to the *Survey of Public Participation in the Arts*, published in 2013 by The National Endowment for the Arts (www.arts.gov), 22.4% of adults (52.8 million adults) went to a crafts fair or visual arts festival in the prior 12 months, a drop from 24.5% who did so in 2008.

By demographic, the percentages of adults who attended a crafts fair or visual arts festival were as follows:

**Gender**
- Female: 26.4%
- Male: 18.1%

**Age**
- 18-to-24: 18.2%
- 25-to-34: 21.6%
- 35-to-44: 22.0%
- 45-to-54: 24.5%
- 55-to-64: 25.8%
- 65-to-74: 26.2%
- 75 and older: 15.1%

**Race/Ethnicity**
- African-American: 11.9%
- Caucasian: 26.2%
- Hispanic: 16.8%
- Other: 16.2%
Education

- Some high school: 8.1%
- High school graduate: 16.3%
- Some college: 23.6%
- College graduate: 32.9%
- Graduate school: 36.9%

Directories of events are posted online at www.sunshineartist.com/shows and www.thecraftshows.net.

The following is a list of prominent crafts festivals:
www rkma.com/leisure/CraftFestivals.pdf.

3.3 Market Resources
Craft & Hobby Association, 319 East 54th Street, Elmwood Park, NJ 07407. (201) 835-1200. (www.craftandhobby.org)
AUTOMOTIVE-FOCUSED ACTIVITIES

4.1 America’s Love Affair With The Automobile

There are about as many automobiles in the United States as there are people. CNW Marketing Research (www.cnwmr.com) estimates the number at more than 290 million, twice as many as were on the road 20 years ago. Nationwide, 18% of households actually have more cars than people.

Passionate owners view their autos as more than simply a mode of transportation; for some their cars, SUVs, and pickup trucks are an extension of themselves. Beyond the over 300 available make and model options, derivatives of the models add up to well over 1,000 options for a vehicle’s style. And this is before extras like steel rims, GPS devices, satellite radio and in-car TVs, sun roofs, tinted windows, and myriad choices of color. For millions, these choices are still not enough, so they customize their cars.

Beyond customizing, car enthusiasts collect vintage autos, attend car shows and auto museums, take driving experiences such as fantasy camp racing, and watch or participate in motor sports.

4.2 Auto Customizing

Car customizing has been prominent in American pop culture since the 1950s. Hobbyists are driven to car customizing for various reasons, from supping up the engine to boost performance to creating a unique look to express personal style, all of which has translated into increased sales of high performance and custom parts and accessories. According to the Specialty Equipment Market Association (SEMA, www.sema.org), retail sales of those parts are $29 billion, or about $10 billion at the manufacturing level.

The biggest growth in customization has come in the ‘tuner’ market. Tuners are four-cylinder compact cars – mostly Asian imports – that are customized with exotic wheels, tires, body kits, paint, and racing engine computers. The tuner market has grown about 35% since 2000, according to Jim Spoonhower, vice president of market research at SEMA. It’s not unusual for tuner enthusiasts to buy a car for $5,000 to $6,000 and then spend another $10,000 to $15,000 customizing it.

The market for auto customizing is most popular among young adults. SEMA estimates college students spend $4.2 billion a year customizing their cars, about 15% of all expenditures for the hobby.
4.3 Auto Shows

Production cars and concept cars are introduced annually at major auto shows throughout the United States. Attendance ranges from 500,000 to over one million at major shows.

The following are the most prominent auto shows:

- Atlanta International Auto Show (Atlanta, GA; www.goautoshow.com)
- Chicago Auto Show (Chicago, IL; www.chicagoautoshow.com)
- Cleveland Auto Show (Cleveland, OH; www.clevelandautoshow.com)
- DFW Auto Show (Dallas, TX; www.dallasautoshow.com)
- Houston Auto Show (Houston, TX; www.houstonautoshow.com)
- LA Auto Show (Los Angeles, CA; www.laautoshow.com)
- North American International Auto Show (Detroit, MI; www.naias.com)
- Philadelphia International Auto Show (Philadelphia, PA; www.phillyautoshow.com)
- San Francisco International Auto Show (San Francisco, CA; www.sfautoshow.com)
- Seattle International Auto Show (Seattle, WA; www.seattleautoshow.com)
- St. Louis Auto Show (St. Louis, MO; www.saintlouisautoshow.com)
- Washington Auto Show (Washington, DC; www.washingtonautoshow.com)

With attendance of more than one million people, the Chicago Auto Show is the largest in the U.S.

Motor Trend Auto Shows (www.motortrendautoshows.com) hosts annual shows in Albuquerque, NM; Anaheim, CA; Baltimore, MD; Charleston, WV; Davenport, IA; Fresno, CA; Greenville, SC; Harrisburg, PA; Honolulu, HI; Las Vegas, NV; Memphis, TN; Milwaukee, WI; Nashville, TN; Orlando, FL; Phoenix, AZ; Providence, RI; Richmond, VA; San Jose, CA; Sandy, UT; Tampa, FL; and Uniondale, NY.

4.4 Vintage Car Shows

Several hundred events are held each year across the U.S. for car enthusiasts. Goodguys Rod & Custom Association (www.good-guys.com), with over 70,000 members, holds 70 events including shows, rallies, and swap meets.

The largest among vintage car shows is the annual Woodward Dream Cruise; its 21st event held in August 2014 drew more than 40,000 cars and one million spectators. The following are some other major annual events:

- Art Center Car Classic - Art Center College of Design (Pasadena, CA; www.artcenter.edu/carc classic/)
- Auburn Cord Dusenberg Festival (Auburn, IN; www.acdfestival.org/festival/)
- Automobilia Monterey (Seaside, CA; www.automobiliamonterey.com)
- Blackhawk Exposition Sale (Pebble Beach, CA; www.blackhawkcollection.com)
- Bonhams & Butterfields Classic Car & Motorcycle Auctions (various locations; www.bonhams.com/usa/cars/)
- Concorso Italiano (Monterey Bay, CA; www.concorso.com)
• Corvettes at Carlisle (Carlisle, PA; www.carsatcarlisle.com/ce/events/corvettes/)
• Forest Grove Concours d’Elegance (Forest Grove, OR; www.forestgroveconcours.org)
• National Corvette Restorers Society annual convention (various locations; www.ncrs.org)
• Pebble Beach Concours d’Elegance (Pebble Beach, CA; www.pebblebeachconcours.net)
• RM Auctions Vintage Motor Cars (various locations; www.rmauctions.com)
• Silver’s Hot August Nights Auction (Reno, NV; www.hotaugustnights.net)
• The Quail, a Motorsports Gathering (Carmel, CA; www.quaillodgeevents.com/pages/thequail.cgi)
• The Morgan Adams Concours d’Elegance (Denver, CO; www.morganadamsconcours.org)
• Woodward Dream Cruise (Detroit, MI; www.woodwarddreamcruise.com)


4.5 Auto Museums

There are around 125 classic auto museums located throughout the United States. Many of the museums are relatively obscure, but they are of interest to vintage auto hobbyists and enthusiasts.

The following are among the most prominent auto museums:

The following are online directories of auto museums:
• www.hubcapcafe.com/resources/classic_car_museums.htm
• www.naam.museum/museum-list/
AVIATION-FOCUSED ACTIVITIES

5.1 Private Aviation

There are an estimated 2.7 million Americans with flying experience. According to the Federal Aviation Administration (FAA, www.faa.gov), there were 599,086 active certificated pilots in the U.S. at year-end 2013. This number has been declining gradually over the past several decades, down from a high of over 827,000 pilots in 1980. One factor contributing to the decline in piloting is the expense of flight training and costs associated with operating and maintaining a plane. It can cost $8,000 to $10,000 for training and licensing, followed by $200 or more an hour for aircraft rental, according to Michael Miller, an aviation consultant for The Velocity Group (www.velocity-group.com).

The total number of pilots in 2013 included 180,214 private pilots, 120,449 student pilots, and 4,824 sport pilots. About 7% of pilots are female. The state of Alaska has the highest number of pilots per capita; out of an estimated 731,449 residents there are 8,066 pilots, a ratio of about 1:91.

According to the FAA, pilots log 28 million flying hours annually, approximately one-third of which are for recreation and personal use.

There are about 220,000 general aviation aircraft in the U.S., more than twice the total of all other nations combined.

5.2 Air Shows

The International Council of Airshows (www.airshows.aero) estimates that approximately 450 airshows are held annually across the United States. Collectively, over 30 million spectators attend these shows. Those figures make it clear that airshows appeal not just to pilots but also to the mainstream public.

The largest air show events, ranked by attendance, are as follows:

- Chicago Air & Water Show (Chicago, IL; http://chicagoairandwatershow.us): 2.2 million
- Battle Creek Balloon Championships and Air Show (Battle Creek, MI; www.bcballoons.com): 978,000
- Great New England Airshow (Westover AFB, MA; www.greatnewenglandairshow.com): 900,000
- EAA AirVenture Oshkosh (Oshkosh, WI; www.eaa.org/en/airventure): 800,000
- Joint Services Open House (Andrews AFB, MD; www.jsoh.org): 750,000
• MCAS Miramar Air Show (Miramar, CA; http://miramarairshow.com): 700,000
• Sun ‘n’ Fun Fly-In (Lakeland, FL; www.sun-n-fun.org): 700,000
• Thunder Over Louisville (Louisville, KY; http://thunderoverlouisville.org): 650,000
• AirFest (McDill AFB, 56th Operations Group, FL; www.macdill.af.mil): 525,000

The following links to a list of prominent air shows by state: www.rkma.com/leisure.airshows.pdf.

The following are online directories of air shows:
• www.aero-pix.com/schedule/schedule.htm
• www.airshownetwork.com/all_shows.html
• www.airshows.com
• www.milavia.net/airshows/calendar/

5.3 Market Resources
American Institute of Aeronautics and Astronautics, 1801 Alexander Bell Drive, Suite 500, Reston, VA 20191. (703) 264-7500. (www.aiaa.org)

Federal Aviation Administration, 800 Independence Avenue SW, Washington, DC 20591. (202) 493-4305. (www.faa.gov)

6

BICYCLING

6.1 Overview

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (SFIA, www.sfia.org), 40.9 million people bike at least once a year – 19.5 million are casual participants (<26 times per year) and 21.4 million are core participants (>26 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>18.0 million</td>
<td>20.6 million</td>
</tr>
<tr>
<td>2009</td>
<td>18.5 million</td>
<td>20.6 million</td>
</tr>
<tr>
<td>2010</td>
<td>19.0 million</td>
<td>20.8 million</td>
</tr>
<tr>
<td>2011</td>
<td>19.1 million</td>
<td>20.7 million</td>
</tr>
<tr>
<td>2012</td>
<td>19.0 million</td>
<td>20.8 million</td>
</tr>
<tr>
<td>2013</td>
<td>19.5 million</td>
<td>21.4 million</td>
</tr>
</tbody>
</table>

The demographics of bicyclists who ride more than six times a year are as follows (source: National Sporting Goods Association [www.nsga.org]):

Gender
- Female: 45.9%
- Male: 54.1%

Age:
- 7-to-11: 22.9%
- 12-to-17: 18.8%
- 18-to-24: 9.4%
- 25-to-34: 17.0%
- 35-to-44: 15.2%
- 45-to-54: 7.5%
- 55-to-64: 4.4%
- 65 and over: 4.8%

Income
- Under $15,000: 13.3%
- $15,000 to $24,999: 12.9%
- $25,000 to $34,999: 15.3%
- $35,000 to $49,999: 20.7%
- $50,000 to $74,999: 24.5%
- Over $75,000: 13.3%
6.2 Top Bicycle-Friendly Cities

   The following are the Top 50 bike-friendly cites in the U.S. (source: Bicycling):
1. Minneapolis, MN (www.ci.minneapolis.mn.us/bicycles)
2. Portland, OR (www.portlandoregon.gov/transportation/34772)
4. Seattle, WA (www.seattle.gov/transportation/bikeprogram.htm)
5. Eugene, OR (www.eugene-or.gov/bicycles)
6. San Francisco, CA (www.sfbike.org)
7. Madison, WI (www.cityofmadison.com/bikeMadison/)
8. Tucson, AZ (http://biketucson.pima.gov)
9. New York, NY (www.bikenewyork.org)
10. Chicago, IL (www.chicagobikes.org)
11. Austin, TX (www.lobv.org)
12. Denver, CO (www.bikedenver.org)
13. Washington, DC (www.waba.org)
14. Ann Arbor, MI (www.wbwc.org)
15. Phoenix/Tempe, AZ (www.biketempe.org)
17. Albuquerque, NM (www.cabq.gov/parksandrecreation/recreation/bike/bicycling)
18. Colorado Springs, CO (www.bikesprings.org)
19. Salem, OR (www.salembicycleclub.org)
20. Scottsdale, AZ (www.scottsdaleaz.gov/traffic/alttransmethod/bikeways)
21. Louisville, KY (www.louisvilleky.gov/bikelouisville)
22. Chattanooga, TN (www.chattbike.com)
23. Long Beach, CA (www.bikelongbeach.org)
24. Cary, NC (www.townofcary.org)
25. Milwaukee, WI (http://city.milwaukee.gov/bike)
27. Philadelphia, PA (www.bicyclecoalition.org)
28. Pittsburgh, PA (www.bike-pgh.org)
29. Charleston, SC (www.charlestonmoves.org)
30. Arlington, VA (www.bikearlington.com)
31. Sioux Falls, SD (www.siouxfalls.org/parks/bike.aspx)
32. Boise, ID (www.boisebicycleproject.org)
33. Kansas City, MO (www.kcbike.info)
34. Columbus, OH (www.ohiobikeways.net/columbus.htm)
35. Tulsa, OK (www.bikewalktulsa.org)
36. Grand Rapids, MI (www.bikegrandrapids.org)
37. Billings, MT (http://bikenet.org/)
38. St. Louis, MO (www.stlbiking.com)
39. Cleveland, OH (www.bikecleveland.org)
40. Greensboro, NC (www.bikegreensboro.org)
42. Omaha, NE (www.bikeomaha.blogspot.com)
43. Salt Lake City, UT (www.slcgov.com/bike)
44. Miami/Miami Beach, FL (www.greenmobilitynetwork.org)
45. Indianapolis, IN (www.indy.gov)
46. Fargo, ND (www.gncycles.com)
47. Anchorage, AK (www.bicycleanchorage.org)
48. Baltimore, MD (www.baltobikeclub.org)
49. Little Rock, AR (www.bikelr.com)
50. Rochester, NY (https://rbc.wildapricot.org/)

### 6.3 Bike-Sharing Programs

Bike-sharing programs are popular in many major European cities. Paris, for example, has 20,600 bikes available for residents and visitors at about 1,450 stations throughout the city. Similar programs have been launched in several U.S. cities.

While a few bike-sharing programs were launched in the U.S. in the late-1990s, all were abandoned after pilot runs. The first permanent public bike-rental programs in the U.S. were launched in Washington, D.C., and Louisville, Kentucky, in 2008. These programs spurred other cities to look at the concept; by 2012, about two dozen major cities had developed plans for their own program. Today, there are more than 21,000 shared bikes in over 36 states.

The following are among the most successful bike-share programs in the U.S.:
- Buffalo, NY: Go Bike Buffalo (http://gobikebuffalo.org)
- Chicago, IL: Divvy (www.divvybikes.com)
- Denver, CO: B-cycle (www.denverbikesharing.org)
- Des Moines, IA: B-cycle (https://desmoines.bcycle.com)
- Las Vegas, NV: Downtown Project (www.downtownproject.viacycle.com)
- Louisville, KY: Freewheelin’ (www.freewheelinwaytogo.com)
- Madison, WI: Madison B Cycle (http://madison.bcycle.com)
- Mesa, AZ: Freewheelin’ (www.freewheelinwaytogo.com)
- Miami Beach, FL: DecoBike (www.decobike.com)
- Minneapolis, MN: Nice Ride MN (www.niceridemn.org)
- Stanford, CA: Freewheelin’ (www.freewheelinwaytogo.com)
- Tamarac, FL: Freewheelin’ (www.freewheelinwaytogo.com)
- Washington, DC: Capital Bike Share (www.capitalbikeshare.com)

With bike-rental service in over 25 U.S. cities, B-cycle (www.bcycle.com) is the largest bike-share operator in the U.S.

DecoBike, launched in 2011 in Miami Beach, ranks #1 among bike-share programs. With more than 500,000 memberships today, about 1,700,000 total rides were logged in the first year of operation of the program.

Bike-sharing is popular with residents and tourists alike. While DecoBike reports that approximately 70% of rides are by local subscribing members, about 30% of rides are by tourists or non-member locals.
Over 100 American universities offer some form of campus bike-sharing program, according to the Association for the Advancement of Sustainability in Higher Education (www.aashe.org).

The Earth Policy Institute (www.earth-policy.org) projects as many as 38,000 shared bikes across the U.S. by year-end 2015.

6.4 Bicycle Trails

The U.S. Bicycle Route System is under development as a national network of bicycle routes linking urban, suburban, and rural areas across the continental United States. For a route to be officially designated a U.S. Bicycle Route, it must connect two or more states, a state and an international border, or other U.S. Bicycle Routes. Routes are nominated for numbered designation by State Departments of Transportation (DOTs) and are catalogued by the American Association of State Highway and Transportation Officials (AASHTO, www.transportation.org) through the Special Committee on U.S. Route Numbering, the same committee that assigns numbers to U.S. highways and interstates.

The first two U.S. Bicycle Routes were established in 1982: U.S. Bike Route 1 in Virginia and North Carolina, and U.S. Bike Route 76 in Virginia, Kentucky, and Illinois. No additional routes were designated until 2003 when AASHTO formed a Task Force (http://route.transportation.org/pages/USBicycleRoutes.aspx) to reinvigorate the system.

The East Coast Greenway (ECG; www.greenway.org), begun in 1991, is one of the most ambitious bicycle route projects to date; the scope of the project is to link 2,900 miles of urban, suburban, and rural hiking and biking trails from the Canadian border in Maine to the Florida Keys. Similar in scope to the Appalachian Trail – but passing through dense population zones like Boston, New York, and Washington, D.C. – the ECG is largely funded by government grants earmarked for alternative transportation projects.

The first 370 miles of the Greenway (54 new or renovated paved trails – mostly in New England and the Mid-Atlantic) opened in 2003; the cost was $400 million. When finished the ECG will include direct links with 27 Amtrak stations. Total cost is estimated at $1.9 billion.

As of year-end 2013, 29% of the trail was complete (off-road). The following are the 29 spine routes of the Greenway:

- Calais, ME
- Bangor, ME
- Portland, ME
- Portsmouth, NH
- Newburyport, MA
- Boston, MA
- Worcester, MA
- Providence, RI
- Hartford, CT
The Adventure Cycling Association (www.adventurecycling.org) developed the Underground Railroad Bicycle Route (Mobile, Alabama, to Owen Sound, Ontario) in 2007. There are five segments totaling a distance of 2,006 miles. This is the only U.S. trail ranked by National Geographic in the world’s Top 10 Cycling Routes.

6.5 Mountain Biking

According to the SFIA, 8.5 million people mountain bike at least once a year – 3.8 million are casual participants (<13 times per year) and 4.8 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>3.3 million</td>
<td>4.0 million</td>
</tr>
<tr>
<td>2009</td>
<td>3.4 million</td>
<td>4.0 million</td>
</tr>
<tr>
<td>2010</td>
<td>3.4 million</td>
<td>3.8 million</td>
</tr>
<tr>
<td>2011</td>
<td>3.2 million</td>
<td>3.8 million</td>
</tr>
<tr>
<td>2012</td>
<td>3.3 million</td>
<td>4.0 million</td>
</tr>
<tr>
<td>2013</td>
<td>3.8 million</td>
<td>4.8 million</td>
</tr>
</tbody>
</table>

The following are among the best mountain biking trails in the U.S.:

**Big Bend National Park** (Texas)
- Lightly traveled roads and varied terrain make Big Bend National Park (www.nps.gov/bibe/planyourvisit/biking.htm) a premier bicycling location. Over 100 miles of paved roads and 160 miles of backcountry dirt roads provide challenges for
riders of all levels. The National Park Service recommends nine trails ranging in
distance from 20 miles to 35 miles and in difficulty from easy to strenuous.

**Big Boulder Trail** (Downieville, CA)
- In recent years Downieville has become the premiere West Coast mountain bike
  riding destination. In fact, a number of mountain biking pioneers have purchased
  second homes in the area. The consensus is that Big Boulder
  (www.imba.com/epics/big-boulder-trail), a 130-year-old mining trail, is the best trail
  in the region.

**Buffalo Creek Trail** (Pine, CO)
- The diverse Buffalo Creek Trail (www.singletracks.com/bike-trails/buffalo-creek.html),
  an hour west of Denver, features smooth, rolling singletrack and lots of variety. The
  total climb on the 14-mile trail is about 1000 feet.

**Crested Butte Trail 401** (Colorado)
- Trail 401 (www.visitcrestedbutte.com/ride.cfm?rideid=11) is set among some of the
  most awe-inspiring scenery in Colorado. This 14.5-mile trail is often rated by
  mountain bikers, magazines, and books as the Best Singletrack Trail in the U.S. At
  the peak there are spectacular views with the Maroon Bells (two peaks in the Elk
  Mountains) to the east. The Red Mountains and Crested Butte provide the backdrop
  on the down hill track.

**Gauley Headwaters Trail** (West Virginia)
- The Gauley Headwaters (www.singletracks.com/bike-trails/gauley-headwaters.html), a
  37-mile winding track through the Allegheny Mountains and the hardwood forests of
  Monongahela, is the best of several popular tracks in the Appalachian range. The
  trail highlight is a single track decent to the headwaters of Tea Creek.

**Greenbrier River Trail** (West Virginia)
- Originally a part of the Chesapeake and Ohio Railroad, the Greenbrier River Trail
  (www.greenbrierrailtrailstatepark.com) was ranked by *Backpacker* magazine as one of
  the Top 10 biking trails in the United States. The 76-mile trail runs from North
  Caldwell to one mile south of Cass Scenic Railroad State Park. Traversing 35 bridges
  and two tunnels, the trail parallels the Greenbrier River, is less than a 1% grade, and
  features some of the best pastoral and woodland scenery the state has to offer.
  Novice and intermediate mountain bikers appreciate the packed gravel surfaces on
  the majority of the trail. Twelve rustic campsites are available along the trail. The
  Greenbrier River Trail was inducted into the national Rail-Trail Hall of Fame in 2012.

**Natchez Trace Parkway** (Mississippi)
- The Natchez Trace Parkway (www.nps.gov/natr/index.htm) offers an opportunity for
  less experienced riders to get a taste of the more epic, wilderness trails usually
  reserved for hardcore off-roaders.
San Juan Islands (Washington)
• The San Juan Islands (www.visitsanjuans.com/what-to-do/san-juan-islands-bicycling) provide three tiers of cycling adventures, from moderate to challenging. Lopez Island, the least hilly of the San Juan Islands, offers a couple of 30 mile trails with beautiful ocean vistas and stop-offs for picnics, wildlife viewing, or short hikes. The 20-mile trail of San Juan Island is more challenging. While the island can be circumnavigated in a day, visitors often allow two or three days so they can also explore the parks, beaches, and communities along the way. Orcas Island, a popular destination for orca whale watching during summer, provides a challenging ride, even for experienced cyclists, and a 2,409-foot view from Mount Constitution.

Slickrock Trail (Utah)
• World-renowned Slickrock Trail (www.utah.com/bike/trails/slickrock.htm) is credited with transforming Moab into a mountain biking mecca. Hosting over 100,000 visitors per year, Slickrock is the most popular mountain bike trail in the world. The unique slickrock medium allows a mountain bike to be ridden to its fullest expression as the traction between stone and tires can hold a bike at gravity defying angles. The 12-mile trail takes riders along petrified sand dunes and an ancient dry seabed, with expansive views of the vast rock hills of Utah’s canyon lands.

6.6 Market Resources
Adventure Cycling Association, 150 East Pine Street, P.O. Box 8308, Missoula, MT 59807. (800) 755-2453. (www.adventurecycling.org)

Alliance for Biking and Walking, 1612 K Street, Suite 802, Washington, DC 20006. (202) 449-9692. (www.peoplepoweredmovement.org)

East Coast Greenway, 5315 Highgate Drive, Suite 105, Durham, NC 27713. (919) 797-0619. (www.greenway.org)

International Mountain Bicycling Association, P.O. Box 20280, Boulder, CO 80308. (303) 545-9011. (www.imba.com)

7

BOATING

7.1 Boat Ownership

According to Recreational Boating Statistics 2013, an annual report by the United States Coast Guard (www.uscg.mil), 11.9 million recreational boating vehicles were registered in the U.S. in 2013, a decrease of 0.9% from the previous year. By type of boat, registrations were as follows:

- Power boats: 9.9 million
- PWCs: 1.3 million
- Sailboats: 249,803
- Other boats: 737,509

Twenty states account for 75% of registered boats. Boating is most popular in California, Florida, Michigan, and Minnesota; these states each account for about 10% of registrations. New York, Texas, and Wisconsin each account for 5% or more of registered boats.

According to the National Marine Manufacturers Association (NMMA, www.nmma.org), the following states led the U.S. in sales of new powerboats, motorboats, trailers, and accessories in 2013 (percent change from previous year in parenthesis):

- Florida: $1.96 billion (16%)
- Texas: $1.18 billion (-2%)
- Michigan: $656 million (2%)
- Delaware: $574 million (19%)
- Minnesota: $557 million (1%)
- New York: $552 million (3%)
- Wisconsin: $519 million (no change)
- North Carolina: $508 million (4%)
- Louisiana: $478 million (-5%)
- California: $432 million (18%)

7.2 Market Assessment

According to the NMMA, the total economic impact of recreational boating is $121.5 billion. The boating industry generated $36.7 billion in 2013 from sales of recreational boats, accessories, and marine services, up 3.2% from 2012.
**Boat Dealers Industry Profile**, an August 2014 report by First Research (www.firstresearch.com) assesses that the U.S. boat dealership sector includes about 4,700 establishments (single-location companies and units of multi-location companies) with combined annual revenue of about $12 billion. Major companies include MarineMax (www.marinemax.com) and West Marine (www.westmarine.com). The industry is fragmented: the 50 largest dealers generate less than 30% of revenue.

### 7.3 Boat Shows

Boat shows are popular with boaters – including owners, renters, and those who simply love boating.

NMMA hosts 16 boat and sport shows throughout the United States. Scheduled for 2014 are boat shows in Atlanta, GA; Atlantic City, NJ; Baltimore, MD; Boston, MA; Chicago, IL; Kansas City, MO; Los Angeles, CA; Louisville, KY; Miami, FL; Minneapolis, MN; Nashville, TN; New York, NY; and St. Louis, MO. Progressive Insurance has title sponsorship for the events.

### 7.4 Marinas

**Marinas Industry Profile**, published in June 2014 by First Research (www.firstresearch.com), estimates there are about 3,500 commercial marinas, excluding private yacht clubs, with combined annual revenue of more than $3 billion. A typical marina has 50 to 100 slips.

About 40% of marina revenue comes from slip and storage fees, 15% from maintenance, and 10% from fuel sales, 5% from food sales, and 5% from marine equipment sales.

More than 90% of U.S. marina operators have only one location. The largest operators are California Yacht Marina, Flagship Marinas, Marinas International, and Westrec Marinas.

IBISWorld (www.ibisworld.com) assesses the marina business as somewhat larger than does First Research, estimating there are 4,350 marinas in the United States with combined revenue of $4 billion.

### 7.5 Market Resources


8.1 Market Summary
Approximately seven of every 10 adults place a wager of some type at least once each year. Americans wager approximately $900 billion at casinos and racetracks, playing lottery games, and on other forms of legal betting. The estimated $100 billion to $300 billion wagered annually in the U.S. on sports events and the more than $100 billion in estimated online bets are not included in this total.

The bulk of total wagers is returned to the wagering public as winnings. Gross gaming revenue, or the amount retained by casinos, racetracks, lotteries, and other gaming hosts, totaled $97.6 billion in 2013. Distribution by type of activity is as follows:
- Casinos
  - Land-based/riverboat casinos and racinos: $37.8 billion
  - Tribal casinos: $27.4 billion
- Lotteries: $28.1 billion
- Parimutuel wagering (thoroughbred, harness, and greyhound racing, and jai-alai): $2.6 billion
- Card rooms (poker): $1.2 billion
- Charitable bingo: $800 million
- Sports books: $170 million

8.2 State-by-State Summary
All but two states – Hawaii and Utah – allow some form of wagering. Forty states allow casinos. Parimutuel wagering is legal in 41 states. Forty-four jurisdictions (i.e., 43 states and the District of Columbia) operate lotteries.

The following is a summary of gaming and wagering allowed in each state:

<table>
<thead>
<tr>
<th>State</th>
<th>Casinos</th>
<th>Parimutuel</th>
<th>Lottery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>0</td>
<td>✓</td>
<td>0</td>
</tr>
<tr>
<td>Alaska</td>
<td>✓</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Arizona</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Arkansas</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>California</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Colorado</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Connecticut</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Delaware</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>0</td>
<td>0</td>
<td>✓</td>
</tr>
</tbody>
</table>
• Florida: ✓ ✓ ✓ ✓
• Georgia: o o ✓
• Hawaii: o o o
• Idaho: ✓ ✓ ✓ ✓
• Illinois: ✓ ✓ ✓ ✓
• Indiana: ✓ ✓ ✓ ✓
• Iowa: ✓ ✓ ✓ ✓
• Kansas: ✓ ✓ ✓ ✓
• Kentucky: o ✓ ✓
• Louisiana: ✓ ✓ ✓ ✓
• Maine: ✓ ✓ ✓ ✓
• Maryland: ✓ ✓ ✓ ✓
• Massachusetts: ✓* ✓ ✓ ✓
• Michigan: ✓ ✓ ✓ ✓
• Minnesota: ✓ ✓ ✓ ✓
• Mississippi: ✓ o o o
• Missouri: ✓ ✓ ✓ ✓
• Montana: ✓ ✓ ✓ ✓
• Nebraska: ✓ ✓ ✓ ✓
• Nevada: ✓ ✓ ✓ o
• New Hampshire: o ✓ ✓
• New Jersey: ✓ ✓ ✓ ✓
• New Mexico: ✓ ✓ ✓ ✓
• New York: ✓ ✓ ✓ ✓
• North Carolina: ✓ o ✓
• North Dakota: ✓ ✓ ✓ ✓
• Ohio: ✓ ✓ ✓ ✓
• Oklahoma: ✓ ✓ ✓ ✓
• Oregon: ✓ ✓ ✓ ✓
• Pennsylvania: ✓ ✓ ✓ ✓
• Rhode Island: ✓ ✓ ✓ ✓
• South Carolina: o o ✓
• South Dakota: ✓ ✓ ✓ ✓
• Tennessee: o o ✓
• Texas: ✓ ✓ ✓ ✓
• Utah: o o o o
• Vermont: o o ✓
• Virginia: o ✓ ✓
• Washington: ✓ ✓ ✓
• West Virginia: ✓ ✓ ✓
• Wisconsin: ✓ ✓ ✓ ✓
• Wyoming: ✓ ✓ ✓ o

notes: ✓ indicates activity; o indicates this type of gaming and wagering is not allowed
* recent legislation allows casinos in Massachusetts but none have yet opened
8.3 City-by-City Survey

International Demographics (www.themediaaudit.com) regularly surveys residents in 80 metropolitan areas on various topics, including gaming and wagering. The following metropolitan areas have the highest percentage of adults who have visited a casino at least once during the prior 12 months:

- Las Vegas, NV: 54.3%
- Reno, NV: 49.7%
- Spokane, WA: 35.5%
- Pittsburgh, PA: 34.4%
- Sacramento, CA: 32.8%
- Allentown-Bethlehem, PA: 31.8%
- Cedar Rapids, IA: 30.7%
- Riverside-San Bernardino, CA: 30.7%
- Oklahoma City, OK: 30.5%
- Albuquerque, NM: 30.3%
- Buffalo, NY: 28.9%

A December 2013 assessment by International Demographics reported that 29.8% of adults in metropolitan areas had purchased a lottery ticket in the prior four weeks. The following metropolitan areas had the highest percentage of adults who had done so:

- Albany, NY: 42.7%
- Miami-Ft. Lauderdale, FL: 41.1%
- Louisville, KY: 40.3%
- Atlanta, GA: 39.4%
- Tampa-St. Petersburg, FL: 38.6%
- Albuquerque, NM: 37.9%
- San Antonio, TX: 37.9%
- St. Louis, MO: 37.7%
- Pittsburgh, PA: 37.2%
- Sarasota, FL: 36.8%

Data on the percentages of adults from 90 metropolitan areas that visit casinos and play lotteries is available online at www.themediaaudit.com/press/local-releases.

8.4 Casinos

There are two general categories of casinos in operation in the United States: commercial casinos and tribal casinos. Commercial casinos are further categorized as follows:
• Land-based casinos
• Riverboat or dockside casinos
• Racetrack casinos or ‘racinos’

According to the American Gaming Association, 981 casinos were in operation in the U.S. in 2013, distributed as follows:
• Tribal casinos: 468
• Land-based and riverboat casinos: 464
• Racinos: 49

According to Casino Journal, revenue for commercial casinos (i.e., land-based, riverboat, and racino casinos) was $37.8 billion in 2013, a 1.3% increase from 2012. Casino gaming revenue by state was as follows (change from prior year in parenthesis):
• Colorado: $749 million (-2.3%)
• Delaware: $432 million (-17.0%)
• Florida: $454 million (6.0%)
• Illinois: $1.55 billion (-5.3%)
• Indiana: $2.33 billion (-10.8%)
• Iowa: $1.42 billion (-3.4%)
• Kansas: $365 million (7.0%)
• Louisiana: $2.44 billion (1.7%)
• Maine: $126 million (27.3%)
• Maryland: $749 million (98.2%)
• Michigan: $2.14 billion (-5.1%)
• Mississippi: $1.35 billion (-4.8%)
• Missouri: $1.71 billion (-3.5%)
• Nevada: $11.14 billion (2.6%)
• New Jersey: $2.94 billion (-3.7%)
• New Mexico: $242 million (0.2%)
• New York: $1.93 billion (6.9%)
• Ohio: $1.07 billion (149.1%)
• Oklahoma: $113 million (-0.2%)
• Pennsylvania: $3.11 billion (-1.5%)
• Rhode Island: $558 million (5.7%)
• South Dakota: $103 million (-4.1%)
• West Virginia: $810 million (-14.7%)

The largest casino gaming markets in 2013 were as follows (source: Casino Journal; change from prior year in parenthesis):
• Las Vegas Strip, NV: $6.51 billion (4.8%)
• Atlantic City, NJ: $2.93 billion (-4.0%)
• Chicagoland (IL/IN): $2.10 billion (-6.3%)
• Detroit, MI: $1.35 billion (-4.8%)
• New York, NY: $1.34 billion (10.5%)
Tribal gaming revenues was $28.1 billion in 2012 (most recent data available). According to Casino City’s Indian Gaming Industry Report, 2014 Edition, by Alan P. Meister, Ph.D., of Nathan Associates (www.nathaninc.com), Native-American casinos in the Top Five states generated approximately 61% of total gaming revenue in 2012. Total tribal gaming revenue in these states was as follows (change from prior year in parenthesis):

- California: $6.96 billion (0.8%)
- Oklahoma: $3.70 billion (6.6%)
- Washington: $2.28 billion (5.2%)
- Florida: $2.21 billion (2.5%)
- Connecticut: $1.84 billion (-8.3%)

According to the 2013 AGA Survey of Casino Entertainment, by the American Gaming Association, the following percentages of casino patrons engage in various non-gaming activities:

- Eat at a fine-dining restaurant: 76%
- Visit a bar or club: 65%
- See a show or concert: 62%
- Go shopping: 58%
- Visit a pool, spa, or fitness center: 50%

In the same survey, twice as many people responded that the overall casino experience – dining, shows, and entertainment – is more fun that gambling.

8.6 The Atlantic City Market

Atlantic City, New Jersey, was once the second-largest casino market in the United States, trailing only Las Vegas. The Atlantic City gambling market declined to $2.93 billion in 2013, a 44% drop from the peak of $5.2 billion in 2006.

The decline continued into 2014. According to the New Jersey Division of Gaming Enforcement (www.nj.gov/oag/ge), net gaming revenue for the first six months was 4.9% less than in the same period in 2013.

Five Atlantic City casinos closed in 2014: Atlantic Club Casino and Hotel, Revel Casino Hotel, Showboat, Trump Taj Mahal, and Trump Plaza Hotel and Casino.
“The closings could be a sign of things to come at the U.S. gambling industry bumps up against two unlucky trends, a proliferation of casinos and still-skittish consumers in the wake of the financial crisis.”

*Bloomberg Businessweek, 4/7/14*

### 8.7 Lotteries

According to the North American Association of State and Provincial Lotteries (www.naspl.org), total U.S. lottery sales have been as follows (change from previous year in parenthesis):

- 2009: $58.3 billion (-0.4%)
- 2010: $58.9 billion (1.0%)
- 2011: $62.3 billion (5.8%)
- 2012: $67.1 billion (7.6%)
- 2013: $71.1 billion (5.0%)

The bulk of lottery spending is returned to players as winnings. Profit from lottery sales is approximately 40% of total sales, or about $28 billion in 2013.

The following are 2013 lottery sales for each state (change from previous year in parenthesis):

- Arizona: $718.0 million (5.9%)
- Arkansas: $432.6 million (-3.8%)
- California: $4.84 billion (8.8%)
- Colorado: $564.0 million (-0.4%)
- Connecticut: $1.13 billion (1.8%)
- Delaware*: $612.2 million (-9.9%)
- District of Columbia: $238.1 million (28.4%)
- Florida: $5.23 billion (9.9%)
- Georgia: $3.97 billion (0.8%)
- Idaho: $202.5 million (3.1%)
- Illinois: $2.86 billion (32.4%)
- Indiana: $985.7 million (8.3%)
- Iowa: $335.4 million (1.6%)
- Kansas: $256.6 million (-0.5%)
- Kentucky: $846.9 million (-0.4%)

Louisiana: $460.9 million (3.5%)
Maine: $230.2 million (-0.3%)
Maryland: $2.59 billion (18.3%)
Massachusetts: $4.80 billion (0.6%)
Michigan: $2.52 billion (3.4%)
Minnesota: $555.3 million (-2.4%)
Missouri: $1.15 billion (0.9%)
Montana: $55.5 million (-4.1%)
Nebraska: $162.1 million (1.4%)
New Hampshire: $275.9 million (0.4%)
New Jersey: $2.92 billion (3.9%)
New Mexico: $147.2 million (4.6%)
New York: $9.23 billion (2.0%)
North Carolina: $1.80 billion (9.8%)
North Dakota: $28.0 million (-2.4%)
Ohio: $2.82 billion (1.1%)
Oklahoma: $199.9 million (-4.3%)
Oregon: $1.07 billion (0.9%)
Pennsylvania: $3.79 billion (4.4%)
Rhode Island*: $789.3 million (0.9%)
South Carolina: $1.25 billion (5.9%)
South Dakota*: $641.0 million (2.9%)
Tennessee: $1.41 billion (5.2%)
Texas: $4.43 billion (2.5%)
Vermont: $102.3 million (-1.0%)
Virginia: $1.77 billion (6.6%)
Washington: $592.0 million (5.5%)
West Virginia*: $1.28 billion (-9.2%)
Wisconsin: $568.7 million (0.1%)

* includes revenue from video lottery terminals

According to a recent survey by Experian Simmons (www.smrb.com), 52% of adults bought state lottery tickets at least once during the previous 12 months. Among those who played state lotteries, their frequency of play was as follows:

- Less than once a month: 40%
- More than once a week: 16%
- Two or three times a month: 16%
- Once a week: 12%
- Once a month: 12%
- No response: 2%

Among those who played, the favorite games were as follows (multiple responses allowed):
• Weekly drawing: 72%
• Instant games: 44%
• Daily drawing: 20%

According to Forbes, an estimated 20 million Americans spend at least $1,000 a year on lottery tickets.

8.8 Parimutuel Wagering

Parimutuel wagering is legal in 41 states. The following is a summary of activities by sporting event:
• There is live horse racing in 36 states, with a total of 96 horse racetracks (excluding small tracks at county fairs).
• Greyhound racing is sanctioned in 15 states; there are currently 20 tracks in seven states with live greyhound racing.
• Jai-alai is currently played only in Florida, where there are six active jai-alai frontons.

According to Equibase Corporation (www.equibase.com), wagering on U.S. races (including worldwide commingled wagering on U.S. races) was $10.8 billion in 2013, a figure that has remained flat for three years but down by one-third from a decade ago. Recent handle (or total wagers) has been as follows:
• 2003: $15.2 billion
• 2004: $15.1 billion
• 2005: $14.6 billion
• 2006: $14.8 billion
• 2007: $14.7 billion
• 2008: $13.6 billion
• 2009: $12.3 billion
• 2010: $11.4 billion
• 2011: $10.8 billion
• 2012: $10.9 billion
• 2013: $10.8 billion

The decline in attendance at races has been even greater than wagering figures indicate. Approximately $9.8 billion of the 2012 total handle was from off-track wagers; on-track wagers account for about $1.1 billion of the total.

The number of race days have been as follows (source: Equibase):
• 2008: 6,093
• 2009: 5,934
• 2010: 5,473
• 2011: 5,298
• 2012: 5,310
• 2013: 5,143
“Tracks are closing. Purses are dwindling. Fewer foals are being bred. Veteran breeders and trainers are hanging up their boots. Once privileged as the primary form of legal gambling in the U.S., horse racing now fights to be noticed in a gaudy arcade where strategy minded consumers choose among games from blackjack to Powerball to fantasy football. The arcane art of handicapping a parimutuel wager is downright tedious in an age of slot-feeding, card-scratching instant gratification.”

Time, 5/13/13

Large one-day races and niche events continue to prosper. Attendance at the 140th Kentucky Derby (May 3, 2014) was 164,906, the second highest ever for the race. The Preakness Stakes and the Belmont Stakes, which along with the Kentucky Derby comprise the Triple Crown of Thoroughbred Racing, remain popular. Attendance also remains strong for the two-day Breeders’ Cup World Championships, held at Santa Anita Park (California) and at Saratoga, the six-week meet in upstate New York.

The decline in interest in greyhound racing has been even greater than that for horseracing. According to the American Greyhound Track Operators Association (AGTOA, www.agtoa.com) and state racing commissions, there are now 20 greyhound racing tracks with live racing in the U.S. Thirteen additional tracks remain open but offer simulcast-only wagering.
“After a decade in which more than half the greyhound tracks in the country have closed, many of the remaining operations have survived ... [because] the owners are required to keep the greyhounds running. There are now [20] tracks in 7 states, down from 49 tracks in 15 states a decade ago. Some tracks have gone out of business, others were shut down through legislation, and most of the survivors rely on other gambling revenue.”


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8.9 Market Resources

Casino City Press, 95 Wells Avenue, Newton, MA 02459. (617) 332-2850. (www.casinocitypress.com)

Casino Journal, 2401 W. Big Beaver Road, Suite 700, Troy, MI 48084. (847) 763-9534. (www.casinojournal.com)


North American Association of State and Provincial Lotteries, 6 North Broadway, Geneva, OH 44041. (440) 466-5630. (www.naspl.org)
9

CHALLENGE COURSES

9.1 Adventure Races and Obstacle Races

*SportsBusiness Journal (SBJ)* estimates that more than two million people competed in adventure races and obstacle races in 2013. Events attract up to 20,000 athletes a weekend to ranches, farms, motocross venues, and offseason ski resorts.

Obstacle races, which require both strength and cardiovascular endurance, combine running with climbing ropes and walls, slithering under cargo nets and barbed wire, carrying sandbags and logs, leaping over fire, and crawling through claustrophobia-inducing tubes and freshly dug tunnels.

The majority of adventure race participants are in the 21-to-35 age group, a younger demographic than marathons and triathlons. Finish line parties with bands and free beer for over-21 athletes is standard at races.

Three national race series each generated more than $50 million in revenue in 2013, with the bulk of revenue coming from entry fees. The following are the major races:

**Reebok CrossFit Games**

- The CrossFit Games ([http://games.crossfit.com](http://games.crossfit.com)), a series of competitions held annually since 2007, are designed to recognize the fittest men and women in the world. There are three stages of the CrossFit Games: worldwide Opens, with several thousand competitors, 17 Regionals, and the annual Reebok CrossFit Games, where 100 athletes compete in three days of events.

**Spartan Race**

- Spartan Race ([www.spartan.com](http://www.spartan.com)) attracted 350,000 participants to 40 events in 2013. Races range from three to 13 miles.

- Death Race ([www.youmaydie.com](http://www.youmaydie.com)), one of the Spartan events, takes athletes through the hills and frigid waters of Pittsfield, Vermont, around the clock until roughly 80% of the field drops out.

- A three-mile course in and around Fenway Park (Boston, MA) in November 2013 drew more than 10,000 participants.

**Tough Mudder**

- Launched in 2010, Tough Mudder ([https://toughmudder.com](https://toughmudder.com)) is a 12-mile obstacle course that includes a plunge into a dumpster full of ice water, slogs through natural and man-made muck, and a race-ending dash through electrically charged wires. Runners spend an average of 2½ hours on the course.
• In 2013, Tough Mudder drew 470,000 participants to 35 events in the United States, Europe, Canada, and Australia.
• SBJ estimates the races generated revenue of $70 million in 2013, including six-figure deals with a dozen sponsors that include 24 Hour Fitness, Bic, Dos Equis, EAS, and Under Armour.

**Warrior Dash**

- Warrior Dash (www.warriordash.com), a three-mile muddy obstacle race, attracted over 500,000 participants to its 50 events in 2013. Events are held in the United States and Australia.
- SBJ estimates Red Frog Events, which hosts the races, generated $65 million in 2013 from entry fees and sponsor deals with MillerCoors, Reebok, and Monster Energy.
- Participants are 70% to 80% male and the average age is 30.

The following are other popular adventure races:

- **Cycle Messenger World Championship (www.chicagocmwc.com):** a series of 20 races in 11 countries with the primary event held in Chicago
- **Oyster The Race (www.oystertherace.com):** team races held in nine cities
- **Rugged Maniac Obstacle Race (www.ruggedmaniac.com):** hosted in Brooklyn, Chicago, Minneapolis, and other cities, includes 12-foot walls to scale and 50-foot water slides
- **Ski to Sea (www.skitosea.com):** an 89-mile race from Bellingham to Seattle that involves seven sports
- **Too Cool Real Adventure Racing (www.toocoolracing.com):** a series of several races in Rock Springs, Texas; events include underwater "snorkelteering"

### 9.2 Market Resources

Association for Challenge Course Technology, P.O. Box 47, Deerfield, IL 60015.
(800) 991-0286. (www.acctinfo.org)
10

COLLECTING

10.1 Participation and Spending

According to *Brandweek*, approximately 50 million Americans collect as a hobby. *Investor’s Business Daily* estimated the collectibles business (excluding art, jewelry, and vintage automobiles/aircraft) at $70 billion annually.

Classic collectibles include antiques, autographs, baseball cards, Beatles collectibles, bobblehead figures, books, bottles and jars, bricks, coins, comic books, duck decoys, glassware, photographs, post cards, pottery, record albums, rock ‘n roll memorabilia, rocks and fossils, semi-precious stones, souvenirs, sports memorabilia, and stamps. *Warman’s Field Guides* identifies other popular collections: Barbie dolls, Bean Plush, cookie jars, depression glass, Disney collectibles, dolls, Elvis collectibles, firearms, fishing lures, Hot Wheels, Hummels, jewelry, Kitschy kitchen, Lionel trains, Match Box toys, militaria, tools, toys, watches, and Zippo lighters. For the affluent, popular collections include antiquities, classic cars, fine art, gems and precious stones, rare wines, and vintage aircraft. Even these lists just scratch the surface of collectibles. There are at least 2,200 categories of collectibles, according to Tony Hyman, former host of CBS’s *What It’s Worth*.

The following are estimates by Pamela N. Danziger, president of Unity Marketing (www.unitymarketingonline.com), of participation for some popular types of collections:

- Coins: 27 million
- Stamps: 20 million
- Figurines and sculpture: 20 million
- Trading cards: 18 million
- Memorabilia: 16 million
- Dolls: 16 million
- Christmas items: 15 million
- Plush/bean bag toys: 14 million
- Crystal figurines: 12 million
- Die-cast cars and models: 12 million
- Art prints and lithographs: 10 million
- Miniatures: 10 million

The typical collecting household maintains more than three separate collections. An estimated 70% of these households purchased one or more items for their collections in the past year.
Collecting tends to be more actively pursued by consumers ages 35-to-64. In a survey by Unity Marketing, only 11% of those who identified themselves as collectors were under age 36; most were over 50.

A collectibles index reported in 2013 by the wealth-management arm of Barclays (www.barclays.com) found the following year-over-year growth in the value of high-end collectibles:

- Fine art: 36%
- Classic cars: 25%
- Coins: 17%
- Wine: 10%
- Stamps: 6%

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“The index has shot up by 211% in nominal terms since 2003 and by 54% since the first quarter of 2009. In comparison, the MSCI World, a stock market index, has increased 147% since 2003.”

*The Economist, 8/17/13*

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10.2 Art Collecting

*Art Market Monitor* estimates the U.S. art market at $40 billion. Arts Economics (www.artseconomics.com) placed the global art market in 2013 at $66 billion.

The market for fine art is primarily being driven by two factors: an increase in the number of wealthy collectors around the world and the recognition of art as an investment.

According to *The Art Newspaper*, online art sales were $1.6 billion in 2013, an increase from $870 million in 2012. The market is projected to increase to $3.8 billion by 2018.

10.3 Classic Cars

*The Wall Street Journal* estimates there are nearly three million antique and classic collector cars in the U.S.

According to Bonhams (www.bonhams.com), a British auction house, the sales of classic cars worldwide exceeds $1 billion annually.
The run-up in collectible auto prices in recent years has been staggering. A 1965 Ferrari 275 GTB Alloy that failed to garner an opening bid of $225,000 at auction in 2001 recently sold for $1.3 million. Prices held up reasonably well during the recession.

While it is not uncommon for vintage cars to sell at prices above a million dollars, collecting is not just a rich man’s hobby. A budding collector can start with a 1965 Ford Mustang or a mint-condition 1957 Volkswagen Beetle, for example, for as little as $15,000. A new generation of collectors is expected to eventually run up the prices of the cars of their youth, such as Datsun 240Zs and Honda CRXs.

Classic cars are generally bought and sold through auctions hosted by Barrett-Jackson Auction Co. (www.barrettjackson.com), Gooding & Co. (www.goodingco.com), and RM Auctions (www.rmauctions.com), among others. Collectible cars are also sold through publications such as DuPont Registry.

The worldwide auction record high for a classic-car auction is the sale of a 1962 250 GTO Ferrari, which sold in 2013 at the annual Pebble Beach Concours d’Elegance (Carmel, CA) for $38 million.

10.4 Commemorative Coins

Between 1999 and 2008, the United States Mint (www.usmint.gov) released a series of commemorative quarters featuring each of the 50 states. The program was extended to the District of Columbia and the U.S. Territories in 2009. The U.S. mint estimates that 147 million people, or almost one-half of the U.S. population, have collected the quarters.

It costs the mint about 9¢ to produce a quarter, so retiring a quarter from circulation as a collectible effectively nets the federal government roughly 16¢. An estimated 50% to 60% of the nearly 40 billion state quarters produced are being held by collectors, yielding the federal government an estimated $4.6 billion profit.

Presidential $1 coins, which were released by the U.S. Mint beginning in 2007, have been popular, outselling and outcirculating their dollar coin predecessors, the Sacagawea and Susan B. Anthony coins.

The U.S. Mint honored Abraham Lincoln throughout 2009 with four back-side designs for the penny. These coins, too, have been immensely popular with collectors.

In 2010, the U.S. Mint began issuing the America The Beautiful Quarters, a series which recognizes National Parks, with five quarters issued per year. The series will continue through at least 2021.

10.5 Sports Cards

The sports trading card industry peaked with sales of $1.1 billion in 1991; sales in 2013 were about $250 million. The number of card stores nationwide is down to less than 1,000, from about 4,500 at peak.
The popularity of baseball card collecting has faltered, in part, because manufacturers began focusing the market toward investors, some charging up to $150 for packs that included extras such as autographs and small pieces of jerseys. Topps has redirected the market back to kids with basic cards that are inexpensive.

Only Topps Company (www.topps.com) and Upper Deck (www.upperdeck.com) remain significant trading card producers; there once were about 80 producers.
11

COMPUTER & VIDEO GAMES

11.1 Market Assessment

According to the Entertainment Software Association (ESA, www.theesa.com) and The NPD Group (www.npd.com), total consumer spending on computer and video games was $21.5 billion in 2013, distributed as follows:

- Content: $15.4 billion
- Hardware: $  4.3 billion
- Accessories: $  2.9 billion

Content spending for computer and video games has been as follows:

<table>
<thead>
<tr>
<th></th>
<th>Video Games</th>
<th>Other*</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010:</td>
<td>$9.4 billion</td>
<td>$7.7 billion</td>
<td>$17.1 billion</td>
</tr>
<tr>
<td>2011:</td>
<td>$8.7 billion</td>
<td>$7.9 billion</td>
<td>$16.7 billion</td>
</tr>
<tr>
<td>2012:</td>
<td>$8.1 billion</td>
<td>$7.1 billion</td>
<td>$15.2 billion</td>
</tr>
<tr>
<td>2013:</td>
<td>$6.1 billion</td>
<td>$9.2 billion</td>
<td>$15.4 billion</td>
</tr>
</tbody>
</table>

* Other delivery formats include computers, digital full games, digital add-on content, mobile apps, social network gaming, and subscriptions.

Bloomberg Businessweek estimates the U.S. market for used video games at $1.6 billion.

DFC Intelligence (www.dfcint.com) estimates the global computer and video gaming market – devices plus software – at $80 billion.

11.2 Participation

According to the ESA, 59% of Americans play video games. Fifty-one percent (51%) of U.S. households own a dedicated game console.

The average game player is 31 years old. The demographic distribution of game players is as follows:

Gender
- Female: 48%
- Male: 52%

Age
- Under 18 years old: 29%
- 18-to-35: 32%
- 36 years and older: 39%
Sixty-two percent (62%) of gamers play games with others, either in person or online. Those whom gamers play with are as follows:

- Friends: 42%
- Siblings or family members other than parents: 32%
- Parents: 18%
- Spouse, partner, or significant other: 14%

### 11.3 Types of Games

The following types of online games are played most often (source: ESA):

- Casual/social games: 30%
- Puzzle, board game, game show, trivia, card games: 28%
- Action, sports, strategy, role-playing: 24%
- Persistent multi-player universe: 11%
- Other: 8%

Forty-four percent (44%) of gamers play on their smartphone; 33% play on their wireless device.

The following types of mobile games are played most often:

- Casual/social games: 46%
- Puzzle, board game, game show, trivia, card games: 31%
- Action, sports, strategy, role-playing: 11%
- Persistent multi-player universe: 4%
- Other: 9%

The popularity of casual/social gaming increased 55% from 2012 to 2013, according to the ESA. Among all gamers, 47% now play social games.

### 11.4 Game Genre

According to The NPD Group’s Retail Tracking Service, video and computer game sales (units sold) in 2013 were distributed by genre as follows:

<table>
<thead>
<tr>
<th>Genre</th>
<th>Video Games</th>
<th>Computer Games</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>31.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Adventure</td>
<td>6.9%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Arcade</td>
<td>0.2%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Casual</td>
<td>2.3%</td>
<td>28.3%</td>
</tr>
<tr>
<td>Children’s entertainment</td>
<td>0.3%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Family entertainment</td>
<td>5.5%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Fighting</td>
<td>3.9%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Flight</td>
<td>0.1%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Racing</td>
<td>4.6%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>
11.5 Digital Gaming

According to Exploring Digital Gaming, a February 2014 report by The NPD Group, 36% of people ages 13 and older are digital gamers, defined as currently playing digitally downloaded games either on a computer, video game console, or portable device; 16% report playing only games downloaded digitally.

“The computer is the most popular device by far for digital gaming, with 90% of digital gamers playing on the device. In sharp contrast, digital gaming on consoles is gaining in popularity, but its penetration is still considerably beneath that of the computer; 28% of digital gamers play digitally downloaded games on a video game console.”

Exploring Digital Gaming
The NPD Group, 2/14

Though digital play is increasing among console players, the frequency of purchasing is still quite moderate. About two-thirds of primary console players (i.e., those who play on consoles most often) are purchasing digital games more than once a year, but only 14% are purchasing on a regular, monthly basis.

11.6 Video Game Consoles

The three major producers of video game consoles – Microsoft, Nintendo, and Sony – introduced the 7th generation of consoles in late 2012 and early 2013.
“Although gaming on smartphones, tablets, and social-networking sites is growing fast, dedicated games consoles still dominate the business.”

*The Economist, 5/25/13*

Nintendo released Wii U in November 2012, superceding the original Wii launched in 2005 and the best-selling among video game console products. Sony announced PlayStation 4 in February 2013 and released the console in November 2013. Its predecessor, PlayStation 3, was introduced in 2006.

In May 2013, Microsoft introduced Xbox One, superceding Xbox 360, which launched in 2005. Microsoft generates $2.2 billion from its entertainment and devices division, dominated by gaming, or 11% of total revenue. That division’s revenue rose by 33% in 2013, compared with 8% total revenue growth. Xbox One is a multimedia device which, along with video gaming, provides live television, music, films, web browsing, social networking, and Skype and video calls.

The seven-year lifespan of 6th generation consoles is an aeon in the gaming sector; new console models had previously been introduced about every five years. This reflects the immense development costs now required and uncertainties about growth in the console marketplace due to the rise of social and mobile gaming. Further hedging their investments in 7th generation console development, the Xbox One and PlayStation 4 were modified versions of a standard chip produced by Advanced Micro Devices. Prior generations utilized custom chips built for gaming.

“The newest games consoles look surprisingly underpowered and are very similar to PCs. That’s because the business is changing.”

*The Economist, 5/25/13*
11.7 Casual and Social Games

Casual games, also called social games because they generally involve online social networking, have become immensely popular. The category includes games such as solitaire played on desktop or mobile platforms, classic two-player games such as Scrabble, and recently developed games such as Candy Crush Saga, which was downloaded 500 million times and played more than 150 billion times in 2013.

eMarketer (www.emarketer.com) estimates the number of U.S. social gamers – those who play at least one game on a social network at least once a month – as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>Pct. of Internet Users</th>
<th>Pct. of Social Network Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>53.0 million</td>
<td>24%</td>
<td>39%</td>
</tr>
<tr>
<td>2011</td>
<td>61.9 million</td>
<td>27%</td>
<td>42%</td>
</tr>
<tr>
<td>2012</td>
<td>68.7 million</td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>2013</td>
<td>73.7 million</td>
<td>30%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Facebook overwhelmingly dominates as the top social gaming destination, with 83% of weekly gamers playing on the site. For many, game play is their main reason to use such sites; about one-half of the time players log in to social sites is to play.

Casual gamers differ sharply from those who make up the video gaming demographic. According to Information Solutions Group (ISG, www.isgconsulting.com), 89% of casual gamers are 30 or older, 72% are female, and 53% are married with kids. Nearly half are college graduates.

Casual gamers play to relax – the same reason people play solitaire, dominoes, or mahjong. The games can be played for 5 minutes – while the baby is sleeping or between office meetings – or for hours at a stretch.

ISG reported the demographics of those playing casual social games as follows:

**Gender**
- Female: 54%
- Male: 46%

**Age**
- 18-to-21: 9%
- 22-to-29: 21%
- 30-to-39: 17%
- 40-to-49: 14%
- 50-to-59: 18%
- 60 and older: 20%

11.8 Mobile Gaming

According to eMarketer, more than half of all U.S. mobile phone users – about 125.9 million people or 39.8% of the total U.S. population – played games on their phones in 2013.
Mobile gaming revenues have been, and are projected, as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Download</th>
<th>In-Game</th>
<th>Ad-Supported</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$260 million</td>
<td>$232 million</td>
<td>$79 million</td>
<td>$572 million</td>
</tr>
<tr>
<td>2012</td>
<td>$587 million</td>
<td>$559 million</td>
<td>$218 million</td>
<td>$1.36 billion</td>
</tr>
<tr>
<td>2013</td>
<td>$746 million</td>
<td>$737 million</td>
<td>$297 million</td>
<td>$1.78 billion</td>
</tr>
<tr>
<td>2014</td>
<td>$907 million</td>
<td>$960 million</td>
<td>$373 million</td>
<td>$2.24 billion</td>
</tr>
<tr>
<td>2015</td>
<td>$1.07 billion</td>
<td>$1.20 billion</td>
<td>$478 million</td>
<td>$2.73 billion</td>
</tr>
<tr>
<td>2016</td>
<td>$1.20 billion</td>
<td>$1.56 billion</td>
<td>$580 million</td>
<td>$3.34 billion</td>
</tr>
<tr>
<td>2017</td>
<td>$1.33 billion</td>
<td>$1.79 billion</td>
<td>$655 million</td>
<td>$3.77 billion</td>
</tr>
</tbody>
</table>

**11.9 Gaming Networks**

Gaming networks provide a platform for gamers to play or watch games online. Twitch.tv and Steam (www.steampowered.com), among other networks, have become immensely popular within the past few years.

In August 2014, Twitch.tv, a live streaming platform, reported one million broadcasters and 45 million unique monthly visitors.

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“During its peak hours, according to one report, Twitch is the web’s fourth largest source of traffic, behind Netflix, Google, and Apple.”

*Time, 8/18/14*

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Amazon acquired Twitch in September 2014 for $1 billion.

Steam offered 3,500 games and reported more than 75 million players as of September 2014. In total, 781 million games were registered to members. Players have logged a combined 3.8 billion hours on Steam’s Dota 2, a fighting games.

**11.10 Esports**

Esports, defined as video game competitions in which players compete in front of live audiences, are gaining popularity in the U.S. and around the world. According to IHS (www.IHS.com), 2.4 billion hours were spent worldwide watching esports video in 2013, an increase from 1.3 billion hours in 2012. IHS forecasts viewing to increase to 6.6 billion hours by 2018.

Newzoo (www.newzoo.com) similarly reports growth in esports, reporting worldwide participation of 71.5 million people in March 2014. Among U.S. gamers, 21% watched or took part in esports. Among older Millennials, ages 21-to-35, 59% said they frequently viewed or participated in the competitions.
11.11 Market Resources
DFC Intelligence, 12707 High Bluff Drive, Suite 200, San Diego, CA 92130. (858) 834-4340. (www.dfcint.com)

eMarketer, 11 Times Square, New York, NY 10036. (212) 763-6010. (www.emarketer.com)


Gains Through Gaming Lab, North Carolina State University, Department of Psychology, Box 7650, Raleigh, NC 27695. (919) 515-2251. (www.gainsthroughgaming.org)

Game Center at New York University, 721 Broadway, New York, NY 10003. (646) 997-0746. (http://gamecenter.nyu.edu/)

Games+Learning+Society Center, University of Wisconsin-Madison, 1401 University Avenue, 2nd Floor, Madison, WI 53715. (608) 265-8739. (www.gameslearningsociety.org)


The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)
12

CRAFTSMAN HOBBIES

12.1 DIYers

People who prefer to fabricate or repair things themselves rather than purchase them or pay for professional repair are referred to as Do-It-Yourselfers (DIYers).

Most homeowners and renters learn the basic skills to perform some of the upkeep and repairs needed for their home. The enjoyment of learning these skills and the satisfaction of completing projects often leads people to take on increasingly complex home improvements, and eventually these tasks become a hobby for many. Skill levels, of course, vary from person to person.

DIYers account for the bulk of sales at home center retail stores. According to JPMorgan (www.jpmorgam.com), 35% of Home Depot’s sales in 2013 came from professional contractors; Loews generated 25% of revenue from contractors. This suggests that DIYers and the general public spend over $80 billion each year at these two chains alone.

A wide range of media supports the DIY hobby. Popular Mechanics, the most popular magazine in the field, dates to 1902 and has a current circulation of 1.2 million. Better Homes and Gardens, Fine Homebuilding, My Home My Style, The Family Handyman, and This Old House, are also popular among DIYers.

The PBS television series This Old House, starring Bob Vila, premiered in 1979; the show remains popular and over 900 episodes have aired as of August 2014. The HGTV Network cable television channel was launched in 1994, followed in 1999 by the DIY Network, both of which offer viewers several DIY shows.

Extensive lines of DIY how-to books are published by Sunset Books.

DIYing is popular on the Internet, with thousands of sites covering every imaginable topic.

12.2 Woodworking

According to Christopher Schwartz, editor of Popular Woodworking, 23 million Americans say they engage in woodworking as a hobby.

A recent Harris Poll found woodworking equal in popularity as a favorite leisure activity with bicycling, bowling, hiking, listening to music, playing cards, running, sewing/crocheting, and swimming. Woodworking ranked above boating, camping, horseback riding, motorcycling, skiing, and tennis as a favorite leisure activity.
Fine Woodworking provides the following profile of its over 200,000 subscribers:

- Average age: 56
- Male: 99%
- Married: 88%
- Attended/graduated college: 86%
- Average household income: $122,928

On average, Fine Woodworking subscribers have been engaged in the hobby for 21 years and spend $8,883 annually on woodworking.

13

CULINARY ARTS

13.1 Cooking for Enjoyment

Seventy-nine percent (79%) of adults enjoy cooking, according to a recent Harris Poll (www.harrisinteractive.com). Harris found attitudes toward cooking as follows:

- Love to cook: 30%
- Enjoy cooking when I have the time: 49%
- Do not enjoy cooking: 14%
- Do not cook: 7%

Adults who love or enjoy cooking, by gender and age demographic, are as follows (source: Harris Interactive):

<table>
<thead>
<tr>
<th>Gender</th>
<th>Love Cooking</th>
<th>Enjoy Cooking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>28%</td>
<td>51%</td>
</tr>
<tr>
<td>Male</td>
<td>32%</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Love Cooking</th>
<th>Enjoy Cooking</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-33:</td>
<td>32%</td>
<td>50%</td>
</tr>
<tr>
<td>34-to-45:</td>
<td>29%</td>
<td>50%</td>
</tr>
<tr>
<td>46-to-64:</td>
<td>28%</td>
<td>50%</td>
</tr>
<tr>
<td>65 and older:</td>
<td>33%</td>
<td>43%</td>
</tr>
</tbody>
</table>

13.2 Farmers’ Markets

For many people who cook at home, weekends include a visit to their favorite farmers’ market to purchase fresh and locally sourced foods.


Eleven states account for 49% of the farmers’ markets in the United States, as follows: California (827 markets), New York (647 markets), Massachusetts (313 markets), Michigan (311 markets), Wisconsin (298 markets), Illinois (292 markets), Ohio (264 markets), Pennsylvania (254 markets), Iowa (227 markets), Virginia (227 markets), and North Carolina (202 markets).
“Though only about 2% of farm sales are retail, the USDA estimates that consumers spend $1 billion at farmers’ markets.”

_Bloomberg Businessweek_


### 13.3 Food & Wine Festivals

There are food and wine festivals in every major metropolitan area; more than 1,000 events are held annually across the United States.

The largest food festival is the 5-day Taste of Chicago, held annually in June and attended by more than 2.5 million people. About two dozen festivals have an annual attendance of 100,000 or more.

The following are among the most popular food and wine festivals:

- **A Taste of Colorado** (Denver, CO; [www.atasteofcolorado.com](http://www.atasteofcolorado.com))
- **Bite of Seattle** (Seattle, WA; [www.biteofseattle.com](http://www.biteofseattle.com))
- **Bridge City Gumbo Festival** (Bridge City, LA; [http://bridgecitygumbofestival.org](http://bridgecitygumbofestival.org))
- **Charleston Wine & Food Festival** (Charleston, SC; [www.charlestonwineandfood.com](http://www.charlestonwineandfood.com))
- **Culinary Festival** (Scottsdale, AZ; [www.scottsdalefest.org](http://www.scottsdalefest.org))
- **Finger Lakes Wine Festival** (Watkins Glen, NY; [www.flwinefest.com](http://www.flwinefest.com))
- **Food & Wine Classic** (Aspen, CO; [www.foodandwine.com/classic](http://www.foodandwine.com/classic))
- **Food Network South Beach Wine & Food Festival** (Miami, FL; [www.sobefest.com](http://www.sobefest.com))
- **Food Network Wine & Food Festival** (New York, NY; [www.nycwineandfoodfestival.com](http://www.nycwineandfoodfestival.com))
- **Hudson Valley Wine & Food Fest** (Rhinebeck, NY; [www.hudsonvalleywinefest.com](http://www.hudsonvalleywinefest.com))
- **Minnesota Monthly Food & Wine Experience** (Minneapolis, MN; [www.foodwineshow.com](http://www.foodwineshow.com))
- **Mohegan Sun Winefest** (Uncasville, CT; [www.sunwinefest.com](http://www.sunwinefest.com))
- **National Shrimp Festival** (Gulf Shores, AL; [http://alagulfcoastchamber.com/pages/ShrimpFestival](http://alagulfcoastchamber.com/pages/ShrimpFestival))
- **Pebble Beach Food & Wine** (Carmel, CA; [www.pbfw.com](http://www.pbfw.com))
• Pensacola Seafood Festival (Pensacola, FL; www.fiestaoffiveflags.org/pensacola-seafood-festival)
• RoadKill Cook-Off (Marlinton, WV; http://pccocwv.com/roadkill)
• Sugarland Wine & Food Affair (Houston, TX; www.sugarlandwineandfoodaffair.com)
• Taste of Atlanta (Atlanta, GA; www.tasteofatlanta.com)
• Taste of Buffalo (Buffalo, NY; www.tasteofbuffalo.com)
• Taste of Dallas (Dallas, TX; www.tasteofdallas.org)
• Taste of Main (Bellevue, WA; http://tasteofmainbellevue.com)
• Taste of Vail (Vail, CO; www.tasteofvail.com)
• Taste Washington (Seattle, WA; www.tastewashington.org)
• Vintage Ohio Wine Festival (Kirtland, OH; www.visitvintageohio.com)
• Vintage Virginia Wine & Food Festival (Centreville, VA; www.vintagevirginia.com)
• Wine & Food Experience (New Orleans, LA; www.nowfe.com)
• Wine Festival (Nantucket, MA; www.nantucketwinefestival.com)
• Winter Wine Festival (Naples, FL; www.napleswinefestival.com)
• World Chicken Festival (London, KY; www.chickenfestival.com)
• Zinfandel Festival (San Francisco, CA; www.zinfandel.org)

Directories of food festivals are available online at the following websites:
• www.festivals.com/food_beverage.aspx
• www.foodreference.com/html/upcomingfoodevents.html

13.4 Cooking Schools

Besides their curricula for students seeking careers in the field, several U.S. cooking schools have programs specially designed for people wanting to sharpen their culinary skills. One such is Johnson & Wales University (www.jwu.edu), with its Chefs Choice classes at its Providence, RI; North Miami, FL; Denver, CO; and Charlotte, NC, campuses.

The Culinary Institute of America (www.ciachef.edu) offers two- to five-day sessions at its upstate New York campus. The basic program covers stocks, sauces, and sautéing; the pastry course tackles delicacies from buttercreams to crème anglaise; and baking courses focus on recipes from sourdough starters to scones. At the school’s campus in St. Helena, California, novices can take a variety of food and wine courses.

The following are other prominent cooking schools, all of which offer both chef demonstrations and hands-on classes:
• Creative Cooking School (Las Vegas, NV; www.creativecookingschool.com)
• Jane Butel Southwest Cooking Classes (Corrales, NM; www.janebutelcooking.com)
• New Orleans Cooking Experience (New Orleans, LA; www.neworleanscookingexperience.com)
• Relish Culinary Adventure (Healdsburg, CA; www.relishculinary.com)
• The French Pastry School (Chicago, IL; www.frenchpastryschool.com)
• The Institute of Culinary Education (New York, NY; www.iceculinary.com)
• Woodlands Resort & Inn (Summerville, SC; www.woodlandsinn.com)
13.5 Culinary Media

The following are the most popular cooking magazines, ranked by circulation (source: Publishers Information Bureau [www.magazines.org]):

- **Taste of Home**: 3.2 million
- **Cooking Light**: 1.8 million
- **Every Day with Rachael Ray**: 1.7 million
- **Bon Appétit**: 1.6 million
- **Food Network Magazine**: 1.4 million
- **Weight Watchers**: 1.3 million
- **Food & Family**: 1.1 million
- **Everyday Food**: 1.0 million
- **Food & Wine**: 950,000
- **Saveur**: 330,000

Food Network, available in 101.4 million U.S. households, has become immensely popular. Harris Interactive found that 50% of adults watch TV shows about cooking occasionally or very often. By demographic, those who do so are as follows:

**Gender**
- Female: 54%
- Male: 46%

**Age**
- 18-to-33: 43%
- 34-to-45: 51%
- 46-to-64: 55%
- 65 and older: 49%

13.6 Winery Tours and Events

According to *Wine & Vine*, there were 7,762 wineries in the U.S. at year-end 2013. All 50 states have at least one winery.

Most wineries are open for public tours. Many wineries have weekly or monthly tasting events, often with live music performances; some host annual festivals. Gundlach Bundschu (www.gunbun.com), for example, hosts a myriad of activities that include a Shakespeare festival, movies under the stars, and classical music concerts.

Winery activities are popular among those who live near wine regions. People living in Austin and San Antonio, for instance, can visit the Texas Hill Country American Viticultural Area and, within that, the 110-square-mile American Viticultural Area of Fredericksburg. About 30 wineries are located within them – as are many of the state’s best BBQ restaurants.

Winery tours and events are popular across the eastern shore of Lake Michigan, where 56 wineries comprise four wine trails, attracting over one million visitors annually.
The most popular wine region, because of its prime setting along Lake Michigan, is the Leelanau Peninsula, home to about 20 wineries, 16 of which have public tasting rooms. The following are online directories of wineries:

- [www.allamericanwineries.com/AAWMain/locate.htm](http://www.allamericanwineries.com/AAWMain/locate.htm)
- [www.winedirectory.org](http://www.winedirectory.org)
- [www.wineriesbystate.com](http://www.wineriesbystate.com)


### 13.7 Homebrewing

The American Homebrewers Association ([www.homebrewersassociation.org](http://www.homebrewersassociation.org)) estimates that 1.2 million people make beer at home. The hobby has flourished since 1979, when federal legislation repealed restrictions on the home-brewing of small quantities of beer.

Some home brewers have turned their hobby into a business. According to the Brewers Association ([www.brewersassociation.org](http://www.brewersassociation.org)), there were 2,483 microbreweries and brewpubs in the U.S. in 2013, an increase from 1,508 in 2009.

Homebrewing typically requires 8-hours of hands-on attention. Fully automatic, all-grain tabletop brewing machines were introduced in 2014 by PicoBrew Symatic ([www.picobrew.com](http://www.picobrew.com)) and Brewbot ([www.brewbot.io](http://www.brewbot.io)), greatly simplifying the process. If prices drop as expected – they are now $1,700 – the machines could become as common in beer lovers’ kitchens as a home espresso maker or bread machine.
14.1 Public Participation in the Arts

*Survey of Public Participation in the Arts*, published once a decade and most recently in 2013 by The National Endowment for the Arts (www.arts.gov), asked U.S. adults which cultural and performing arts activities they had participated in during the prior 12 months. Responses were as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts through electronic media:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Used TV, radio, or the Internet to access arts programming:</td>
<td>71%</td>
<td>167 million</td>
</tr>
<tr>
<td>- Music of any kind:</td>
<td>61%</td>
<td>144 million</td>
</tr>
<tr>
<td>- Programs or information about the visual arts:</td>
<td>57%</td>
<td>135 million</td>
</tr>
<tr>
<td>- Ballet, modern, or contemporary dance programs/shows:</td>
<td>14%</td>
<td>33 million</td>
</tr>
<tr>
<td>- Theater productions (e.g., a musical or stage play):</td>
<td>11%</td>
<td>26 million</td>
</tr>
<tr>
<td>- Books, short stories, or novels read aloud:</td>
<td>7%</td>
<td>16 million</td>
</tr>
<tr>
<td>- Opera:</td>
<td>4%</td>
<td>9 million</td>
</tr>
<tr>
<td>• Used a handheld or mobile device to access art:</td>
<td>38%</td>
<td>90 million</td>
</tr>
<tr>
<td>- Music of any kind:</td>
<td>34%</td>
<td>80 million</td>
</tr>
<tr>
<td>- Novels, short stories, or plays:</td>
<td>16%</td>
<td>38 million</td>
</tr>
<tr>
<td>- Visual artworks (e.g., painting, sculpture, graphic design, photography):</td>
<td>8%</td>
<td>19 million</td>
</tr>
<tr>
<td>- Theater or dance performances:</td>
<td>3%</td>
<td>7 million</td>
</tr>
<tr>
<td>• Used a DVD or CD player, record-player, or tape-player to watch or listen to music or to programs about theater, dance, visual arts, or literature:</td>
<td>27%</td>
<td>64 million</td>
</tr>
<tr>
<td>Moviegoing (excluding at-home viewing):</td>
<td>59%</td>
<td>139 million</td>
</tr>
<tr>
<td>Reading (excluding reading required for school or work):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Books:</td>
<td>54%</td>
<td>127 million</td>
</tr>
<tr>
<td>- Novels or short stories:</td>
<td>45%</td>
<td>106 million</td>
</tr>
<tr>
<td>- Poetry:</td>
<td>7%</td>
<td>16 million</td>
</tr>
<tr>
<td>- Plays:</td>
<td>3%</td>
<td>7 million</td>
</tr>
</tbody>
</table>
### Visual and performing arts attendance

- **49%** 115 million
  - Attended a visual arts event or activity: 39% 92 million
    - Touring a park, monument, building, or neighborhood for historic or design purposes: 24% 57 million
    - Attending a visual arts festival or a crafts fair: 22% 52 million
    - Visiting an art museum or gallery: 21% 50 million
  - Attended a live performing arts event: 37% 87 million
    - Outdoor performing arts festivals: 21% 50 million
    - Musical or non-musical plays: 18% 42 million
    - Classical music, jazz, or Latin, Spanish, or salsa music: 17% 40 million
    - Dance of any kind: 7% 16 million
    - Opera: 2% 5 million

### Art-making or art sharing

- **50%** 118 million
  - Created, performed, or shared art through various activities:
    - Social dancing: 32% 76 million
    - Weaving, crocheting, quilting, needlepoint, knitting, sewing: 13% 31 million
    - Played a musical instrument: 12% 28 million
    - Sang, either alone or with others: 9% 21 million
    - Created leatherwork, metalwork, or woodwork: 8% 19 million
    - Created pottery, ceramics, or jewelry: 5% 12 million
    - Acting: 1% 2 million
  - Performed or practiced in a specific art form: 10% 24 million
    - Dance of any kind: 5% 12 million
    - Choral singing or singing in a choir or glee club: 3% 7 million
    - Classical music: 2% 5 million
    - Latin, Spanish, or salsa music: 1% 2 million
    - Jazz: 1% 2 million
    - Musical or non-musical plays: 1% 2 million
    - Opera: <1% 1 million
  - Emailed, posted, or shared artwork: 40% 94 million
    - Photography: 26% 61 million
    - Music of any kind: 21% 50 million
    - Films or videos: 13% 31 million
    - Other visual art (e.g., painting, sculpture, graphic design): 6% 14 million
    - Dance of any kind: 5% 12 million
    - Poetry, plays, or novels or short stories: 4% 9 million
  - Created photography for artistic purposes or did photo editing: 18% 42 million
• Created other types of visual artworks, did scrapbooking, or creative writing: 14% 33 million
• Created, performed, recorded, edited, or remixed music, dance, film, or video: 10% 24 million

**Arts learning through classes or lessons:**
- Voice training or playing a musical instrument: 3% 7 million
- Art appreciation or art history: 2% 5 million
- Creative writing: 2% 5 million
- Visual arts such as drawing, painting, pottery, weaving, or graphic or fashion design: 2% 5 million
- Dance of any kind: 2% 5 million
- Music appreciation: 1% 2 million
- Photography or filmmaking: 1% 2 million
- Acting or theater: <1% 1 million

### 14.2 Performing Arts Activities

*Survey of Public Participation in the Arts* reported the following percentages of adults attending at least one performing arts function in 2012 and, for comparison, in 2008 and 2002:

<table>
<thead>
<tr>
<th>Musical</th>
<th>2012</th>
<th>2008</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Classical:</td>
<td>8.8%</td>
<td>9.3%</td>
<td>11.6%</td>
</tr>
<tr>
<td>• Jazz:</td>
<td>8.1%</td>
<td>7.8%</td>
<td>10.8%</td>
</tr>
<tr>
<td>• Dance other than ballet:</td>
<td>5.6%</td>
<td>5.2%</td>
<td>6.3%</td>
</tr>
<tr>
<td>• Latin, Spanish, or salsa:</td>
<td>5.1%</td>
<td>4.9%</td>
<td>n/a</td>
</tr>
<tr>
<td>• Ballet:</td>
<td>2.7%</td>
<td>2.9%</td>
<td>3.9%</td>
</tr>
<tr>
<td>• Opera:</td>
<td>2.1%</td>
<td>2.1%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Theater</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Musical play:</td>
<td>15.2%</td>
<td>16.7%</td>
<td>17.1%</td>
</tr>
<tr>
<td>• Non-musical play:</td>
<td>8.3%</td>
<td>9.4%</td>
<td>12.3%</td>
</tr>
</tbody>
</table>

### 14.3 Survey of Metropolitan Areas

According to an October 2013 assessment by International Demographics (www.themediaaudit.com), 30% of U.S. adults living in metropolitan areas attended an opera, symphony, or theatre event within the prior 12 months. The following metropolitan areas have the highest percentage of adults who did so:

- Salt Lake City, UT: 41.1%
- Washington, DC: 38.4%
- Omaha-Council Bluffs, NE: 36.9%
- Ft. Myers-Naples, FL: 36.6%
14.4 Market Resources
Americans for the Arts, 1000 Vermont Avenue NW, 6th Floor, Washington, DC 20005. (202) 371-2830. (www.americansforthearts.org)

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediaaudit.com)

National Endowment for the Arts, 400 7th Street SW, Washington, DC 20506. (202) 682-5400. (www.arts.gov)

National Orchestral Association, P.O. Box 7016, New York, NY 10150. (212) 208-4691. (www.nationalorchestral.org)

• Madison, WI: 35.3%
15.1 Overview
Cultural districts are areas designated or certified by state or local governments that utilize cultural resources to encourage tourism, economic development, and synergism between the arts and other businesses.

“State and municipal arts agencies increasingly are taking a leadership role in establishing policies to cultivate place-based economic development and community revitalization through arts and culture. Cultural districts offer one mechanism to attain these goals by unifying multiple businesses, organizations and the community in areas with potentially significant cultural resources.”

National Assembly of State Arts Agencies

Americans for the Arts (www.americansforthearts.org) estimates there are approximately 500 cultural districts in the U.S., an increase from about 90 in 1998. The Art Newspaper estimates that $250 billion will be spent globally on the creation of cultural districts over the next decade. With project spending of $100 million, the Downtown Brooklyn Cultural District is the largest district under development in the U.S.

15.2 Metropolitan Cultural Districts
Three cities are pioneers of modern cultural districts, as follows:
Dallas Arts District

- The Dallas Arts District (www.thedallasartsdistrict.org) is recognized as the first city-sponsored cultural district in the United States. In 1978, Boston consultants Carr-Lynch recommended that Dallas relocate its major arts institutions from different parts of the city to the northeast corner of downtown, a location that would allow for easy access. It was envisioned that the area would become a lively mix of cultural and commercial destinations, further defined by a mix of contemporary and historic architecture. The cultural build-out was completed in 2013 and the district is now home to the Dallas Museum of Art, the Morton H. Meyerson Symphony Center, the Crow Collection of Asian Art, the Nasher Sculpture Center, the Booker T. Washington High School for the Performing and Visual Arts, the AT&T Performing Arts Center, Dallas City Performance Hall, Klyde Warren Park, and The Perot Museum of Nature and Science.

“Millions of dollars in private funding have been spent on construction since the Nasher Sculpture Center was founded in 2003. Nine buildings have been created or renovated by architects including I.M. Pei, Renzo Piano, Norman Foster, and Rem Koolhaas. Only one was funded solely through taxes. Although $1 billion in public money has been invested in the area over the past three decades, this sum has more than been matched by private investment.”

Catherine Cuellar, Executive Director
Dallas Arts District
The Art Newspaper, 8/14

Indianapolis Cultural Districts

- Indianapolis has designated six neighborhoods as Cultural Districts: Broad Ripple Village, The Canal and White River State Park, Fountain Square, Indiana Avenue, Mass Ave, and Wholesale District. Four of the six districts are in the downtown area. Each district reflects the personality of its community. The city program (www.discoverculturaldistricts.com/home.htm) encourages public art, public museums, private sector galleries and shops, and engaging recreation.
Pittsburgh Cultural District
• The Cultural District is a 14-square block area of the Penn-Liberty Avenue corridor in downtown Pittsburgh, bordered by the Allegheny River. Conceived in 1984 and initially funded by philanthropist H.J. Heinz II, the district is managed by the Pittsburgh Cultural Trust (www.trustarts.org). The Cultural District features six theaters offering some 1,500 shows annually, as well as art galleries, restaurants, and retail shops. Its landmarks include Allegheny Riverfront Park, the August Wilson Center for African American Culture, Benedum Center, Byham Theater, Harris Theater, Heinz Hall, O’Reilly Theater, Pittsburgh Creative and Performing Arts School, Three Rivers Arts Festival Gallery, and Wood Street Galleries.

15.3 State Programs
Twelve states have programs that encourage the creation of cultural districts. According to the National Assembly of State Arts Agencies (NASAA, www.nasaa-arts.org), these states have established 156 cultural districts across the country. State programs are as follows:

Arkansas
• Program: Arts and Cultural Districts, launched in 2011
• Agency: Arkansas Arts Council (www.arkansasarts.org)

Colorado
• Program: Creative Districts 2011
• Agency: Creative Industries Division within the Colorado Office of Economic Development (www.coloradocreativeindustries.org/communities/colorado-creative-districts/certified-districts)

Indiana
• Program: Arts and Cultural Districts, launched in 2008
• Agency: Indiana Arts Commission (https://secure.in.gov/arts/2654.htm)

Iowa
• Program: Cultural and Entertainment Districts, launched in 2005
• Agency: Iowa Department of Cultural Affairs (www.culturalaffairs.org)

Kentucky
• Program: Kentucky Cultural Districts, launched in 2011
• Agency: Kentucky Arts Council (http://artscouncil.ky.gov/Cultural/CulturalDistrictsAbout.htm)

Louisiana
• Program: Louisiana Cultural Districts, launched in 2007
• Agency: Department of Culture, Recreation and Tourism (www.crt.state.la.us/cultural-development/arts/cultural-districts/district-maps/index)
Maryland
• Program: Arts and Entertainment Districts, launched in 2001
• Agencies: Department of Business and Economic Development and the Maryland State Arts Council
  (http://visitmaryland.org/pages/marylandartsentertainmentdistricts.aspx)

Massachusetts
• Program: Cultural Districts, launched in 2010
• Agency: Massachusetts Cultural Council
  (www.massculturalcouncil.org/services/cultural_districts.asp)

New Mexico
• Program: Arts and Cultural Districts, launched in 2007
• Agency: New Mexico Economic Development Department
  (http://nmartsandculturaldistricts.org)

Rhode Island
• Program: Tax-Free Arts Districts, launched in 1998
• Agency: Rhode Island State Council on the Arts (www.arts.ri.gov/special/districts/)

Texas
• Program: Cultural Districts, launched in 2005
• Agency: Texas Commission on the Arts (www.arts.texas.gov/initiatives/cultural-districts/)

West Virginia
• Program: Certified Arts Community, launched in 2005
• Agency: West Virginia Division of Arts and Culture
  (www.wvculture.org/agency/press/certcomm.html)

Several states have legislation that grants local government structures the power to establish arts and cultural districts, with no formal role played by state agencies or departments. This type of district legislation exists in Maine, Mississippi, Missouri, Ohio, Virginia and Wisconsin, among others.

15.4 Museum Districts
Several cities have museums clustered in districts. Such proximity allows visitors to walk from one museum to another. The synergism allows museums to join for promotional programs and to share facilities such as parking. The following are prominent museum districts:

Chicago, IL
• Visited by roughly eight million people annually, 11 museums comprise Museums In the Park www.museumsinthepark.org. Visitor counts for the Art Institute of Chicago,
the Field Museum, the Museum of Science & Industry, and the Shedd Aquarium each are in the 1.3 million to 1.8 million range. Lake Shore Drive was reconfigured in 1998 to create the Museum Campus, making navigation between the museums easier for visitors.

Los Angeles, CA
• Museum Row on Miracle Mile, on Wilshire Boulevard between Fairfax Avenue and La Brea Boulevard, is home to four major Los Angeles museums: Los Angeles County Museum of Art (LACMA), Page Museum at La Brea Tar Pits, Craft and Folk Art Museum, and Petersen’s Auto Museum. LACMA receives 1.2 million visitors annually.

Philadelphia, PA
• The Philadelphia Museum of Art, which received 692,000 visitors in 2013, anchors the Parkway Museums District. Also in the district are the Academy of Natural Sciences, the Rodin Museum, the Franklin Institute, and the main branch of the Free Library of Philadelphia.

San Diego, CA
• Balboa Park is the epicenter for museums in San Diego. Annual visitation to the park’s nine museums ranges from 531,800 visitors to the Reuben H. Fleet Science Center to 87,000 visitors to the Museum of Photographic Arts.

St. Petersburg, FL
• The St. Petersburg Arts Alliance (www.stpeteartsalliance.org) represents five museums that border the waterfront: the Dr. Carter G. Woodson African American Museum, The Dali Museum, the Florida Holocaust Museum, the Museum of Fine Arts, and the St. Petersburg Museum of History.

15.5 Market Resources
Americans for the Arts, 1000 Vermont Avenue NW, 6th Floor, Washington, DC 20005. (202) 371-2830. (www.americansforthearts.org)

Global Cultural Districts Network, 750 N. St. Paul Street, Suite 1150, Dallas, TX 75201. (www.gcdn.net)

National Assembly of State Arts Agencies (NASAA), 1029 Vermont Avenue NW, 2nd Floor, Washington, DC 20005. (202) 347-6352. (www.nasaa-arts.org)
16

ENTERTAINMENT DISTRICTS

16.1 Entertainment Districts

Most major cities have specific areas where entertainment is concentrated. The following are some of the most popular entertainment districts in the United States:

**Alabama**
- Birmingham: The Forge
- Mobile: Dauphin Street

**Arizona**
- Phoenix: Legends Entertainment District

**California**
- Los Angeles: Hollywood
- L.A. Live
- NoHo
- Silverlake
- Sunset Strip
- San Diego: Gaslamp Quarter
- Pacific Beach
- San Francisco: Theater District
- Union Square

**Colorado**
- Denver: LoDo

**Connecticut**
- Norwalk: South Norwalk

**District of Columbia**
- Washington: Adams Morgan
- Atlas District

**Florida**
- Fort Lauderdale: Riverwalk
- Key West: Duval Street
• Miami/Miami Beach: Midtown Miami
  Park West (also called Club Row)
  South Beach
• Orlando: Church Street District
  Downtown Disney
• Tampa: Soho
  Westshore
  Ybor City

Georgia
• Atlanta: Atlantic Station
• Savannah: River Street

Illinois
• Chicago: Greektown
  River North

Indiana
• Gary: Buffington Harbor
• Indianapolis: Broad Ripple Village
  Wholesale District

Kentucky
• Louisville: Fourth Street Live!

Louisiana
• Bossier: The Bossier Strip
• New Orleans: The French Quarter

Maryland
• Baltimore: Fells Point
  Power Plant Live!

Massachusetts
• Springfield: Club Quarter

Michigan
• Detroit: Greektown

Missouri
• Kansas City: Crossroads
  Power & Light Entertainment District
• St. Louis: Grand Center
  Laclede’s Landing

Nevada
• Las Vegas: The Strip

New York
• Brooklyn: Williamsburg
• Buffalo: Allentown
• New York: Theater District
  Times Square

North Carolina
• Raleigh: The Village Subway

Ohio
• Cincinnati: El Paso
  Northside
• Cleveland: Warehouse District

Oklahoma
• Oklahoma City: Bricktown
  NW 39th Street Enclave

Oregon
• Portland: Rose Quarter

Pennsylvania
• Philadelphia: Center City
  Penn’s Landing
  South Street
• Pittsburgh: Station Square
  The South Side

Tennessee
• Memphis: Beale Street
• Nashville: Lower Broadway
  The District

Texas
• Austin: Red River Cultural District
  Sixth Street
  South Congress
• Beaumont: Crockett Street
16.2 Live Music Centers

Austin, Harlem, Kansas City, New Orleans, Nashville, and Memphis are among the destinations that capitalize on their music heritage. The following are highlights of these areas:

**Austin, TX**
- The music of Austin has been described as “a little bit country, a little bit rock and roll, with blues, jazz, even a strong Latin beat and definitely a Western swing.” With nearly 200 live music venues, the city is also known as the Live Music Capital of the World. After debuting in 1976, *Austin City Limits* holds claim as PBS’s longest-running series and is credited with taking Austin music out of the clubs and broadcasting it to the world.

**Branson, MO**
- Dubbed the “Live Music Show Capital of the World,” Branson boasts more than 50 theaters which feature over 100 shows every day. Some 70,000 people daily see shows, pumping $1.5 billion dollars annually into the local economy.
- The longest running shows include *The Baldknobbers Jamboree Show* (more than 15,000 performances since 1959), *Shepherd of the Hills* (more than 7,000 performances since 1960), *Presleys’ Country Jubilee* (more than 10,000 performances since 1967), *The Shoji Tabuchi Show* (more than 7,500 performances since 1989), and *The Finalists Live* (more than 4,000 performances since 1992).

**Harlem (New York, NY)**
- The musical style known as bebop was born in Harlem in the 1940s with jazzmen like Dizzy Gillespie, Charlie ‘Bird’ Parker, and Thelonius Monk. Jazz clubs remain popular in Harlem.

**Kansas City, MO**
- In Kansas City, the 18th and Vine Historic District was where jazz masters such as Count Basie and Charlie Parker produced the swinging signature sound that came to be known as Kansas City-style jazz. Several local clubs and the American Jazz Museum (www.americanjazzmuseum.com) keep the tradition alive.
New Orleans, LA
• Jazz, a combination of many musical styles, including blues, gospel, and ragtime, was born in New Orleans at the turn of the 20th century. Jazz remains a focus of the city’s tourism, with several festivals and clubs throughout the French Quarter.

Memphis, TN
• Memphis is billed as the “Home of the Blues, Birthplace of Rock ‘n Roll.” Among the area’s popular clubs is B.B. King’s Blues Club. Among the attractions are Soulsville USA: Stax Museum of American Soul Music (www.staxmuseum.com), which opened in 2003.

Nashville, TN
• Dubbed Music City USA, Nashville has become one of the leading music recording cities in the country. People can visit RCA Studio B, where renowned musicians like Elvis Presley and the Everly Brothers recorded music history, or stop by the famous Bluebird cafe where songwriters and musicians perform nightly. More than 10 music festivals are held annually in Music City. The CMA Music Festival (www.cmaworld.com/cma-music-festival) draws more than 100,000 music fans each year.
17.1 Equestrian Activities
Equestrian activities include a wide range of interests, from horseback riding to racing, show competitions to trail riding, and more.
Competitive sports involving horses include dressage, endurance riding, eventing, reining, show jumping, tent pegging, vaulting, polo, horse racing, driving, and rodeo.

17.2 Participation
According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 8.1 million people ride at least once a year – 5.6 million are casual participants (<13 times per year) and 2.5 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>7.9 million</td>
<td>3.6 million</td>
</tr>
<tr>
<td>2009</td>
<td>7.1 million</td>
<td>3.2 million</td>
</tr>
<tr>
<td>2010</td>
<td>6.9 million</td>
<td>2.9 million</td>
</tr>
<tr>
<td>2011</td>
<td>6.8 million</td>
<td>2.5 million</td>
</tr>
<tr>
<td>2012</td>
<td>6.1 million</td>
<td>2.3 million</td>
</tr>
<tr>
<td>2013</td>
<td>5.6 million</td>
<td>2.5 million</td>
</tr>
</tbody>
</table>

17.3 Horse Shows
The following are the major organizations managing equestrian events in the United States:
• American Quarter Horse Association (www.aqha.com)
• National Cutting Horse Association (www.nchacutting.com)
• United States Dressage Federation (www.usdf.org)
• United States Equestrian Federation (www.usef.org)
• United States Eventing Association (www.useventing.com)

The following are among the major annual horse shows:
Adequan Select (http://aqha.com/selectworld)
• An eight-day event at the Amarillo (Texas) National Center hosting 1,290 riders.
Bank of America Amateur World Show and the FedEx Open World Show (http://aqha.com/worldshow)
- The two events are held concurrently over 14 days every November in Oklahoma City, OK.
- There are 2,000 horses and 100,000 spectators at the events.

- A nine-day event held in October at Expo Square fairgrounds in Tulsa, OK.
- Approximately 1,800 Arabian horses compete in the show.
- The estimated economic impact is $33 million.

17.4 Polo

The United States Polo Association (USPA, www.usap.org) is the national governing body for the sport of polo in the United States. USPA sanctioned 98 tournaments in 2014.

There are 250 sanctioned polo clubs in the United States. The following are the most prominent (source: National Geographic):
- Eldorado Polo Club (Indio, CA; www.eldoradopolo.com)
- Royal Palm Polo Sports Club (Boca Raton, FL; www.boca-polo.com)
- Santa Barbara Polo & Racquet Club (Carpinteria, CA; www.sbpolo.com)
- The International Polo Club Palm Beach (Wellington, FL; www.internationalpoloclub.com)
- Will Rogers Polo Club (Pacific Palisades, CA; www.willrogerspolo.com)

17.5 Rodeos

Rodeos are assessed in Chapter 34 of this handbook.

17.6 Market Resources

American Quarter Horse Association, 1600 Quarter Horse Drive, Amarillo, TX 79104. (806) 376-4811. (www.aqha.org)

United States Equestrian Federation, 4047 Iron Works Parkway, Lexington, KY 40511. (859) 258-2472. (www.usef.org)

18.1 Overview

A family entertainment center (FEC) is a small amusement park, often focusing on one or a few activities. Many FECs are entirely indoors. Most patrons are families with small children and teenagers.

The following are games and activities typically found at FECs (source: National Association of Family Entertainment Centers [www.fecoperator.org]):

- Arcade games
- Batting cages
- Birthday parties
- Black light mini-golf
- Bowling
- Bumper boats
- Bumper cars
- Climbing wall
- Go kart
- Inflatables
- Interactive games
- Kiddie games
- Laser tag
- Miniature golf
- Paintball
- Redemption games
- Roller skate
- Steel rides
- Water rides

According to the International Association of Amusement Parks and Attractions (IAAPA, www.iaapa.org), there are over 2,000 FEC’s in the U.S.; 22% of FECs have two or more locations.

The distribution of FECs by number of guests hosted annually is as follows (source: IAAPA):

- <50,000: 34%
- 50,000 to 100,000: 24%
- 100,000 to 250,000: 18%
- 250,000 to 500,000: 11%
• 500,000 to 1.0 million: 5%
• 1.0 million to 1.25 million: 3%
• 1.25 million to 1.5 million: 1%
• >1.5 million: 4%

FECs experience comparatively high levels of repeat visitation, with the average patron making more than three visits per season.

Using a wider definition of the sector than IAAPA, IBISWorld (www.ibisworld.com) estimates there are 6,208 family entertainment centers in the United States; combined revenue is $2 billion.

### 18.2 FEC Operators

The following are the largest FEC operators:
- Adventure Landing (www.adventurelanding.com)
- Boomers! Parks (www.boomersparks.com)
- Chuck E. Cheese’s (www.chuckecheese.com)
- Dave & Buster’s (www.daveandbusters.com)
- GameWorks (www.gameworks.com)
- Golfland (www.golfland.com)
- Legoland Discovery Center (www.legolanddiscoverycenter.com)
- Malibu Grand Prix (www.malibugrandprix.com)
- Putt Putt Fun Center (www.puttputt.com)
- Scandia Amusements (www.scandiafun.com)

Three of the largest FEC chains – Chuck E. Cheese’s, GameWorks, and Dave & Buster’s – are restaurant-based.

### 18.3 Paintball Fields

According to IBISWorld, there are 1,176 paintball fields in the United States; combined revenue is $605 million.

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 3.6 million people played paintball in 2013; 1.0 million people played eight or more times. These figures are down 6.8% and 12.2%, respectively, from five years prior.

### 18.4 Laser Tag

According to the Laser Tag Museum (Louisville, KY; www.lasertagmuseum.com), there are an estimated 3,000 laser tag facilities; total annual revenue is about $700 million.

The following are among the largest facilities:
• Branchburg Sports Complex (Branchburg, NJ; www.branchburgsportscomplex.com)
• Forekicks (Taunton, Norfolk, and Marlboro, MA; www.forekicks.com)
• Indoor Extreme Sports (Long Island City, NY; www.indoorextremesports.com)
• Laser Flash (Carmel, IN; www.laser-flash.com)
• Lasertron (Amherst, NY; www.lasertron.us)
• Lazement Laser Tag (Lindsay, CA; www.mcedermontfieldhouse.com/attractions/lasertag/)
• Lazer Blaze (Louisville, KY; www.lazerblaze.com)
• Lazer X (Fort Wayne, IN; www.lazerxfw.com)
• Quarters (Baton Rouge, LA; www.quartersbr.com)
• Stratum Laser Tag Entertainment Center (Mesa, AZ; www.stratumhq.com)
• Track 21 (Houston, TX; www.track21houston.com)
• XP LaserSport Owings Mills (Reistertown, MD; www.xplasersport.com)

18.5 Market Resources


Laser Tag Operators Association, 10135 Colvin Run Road, Suite 100, Great Falls, VA 22066. (703) 766-1480. (http://lasertagoperatorsassociation.org)
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FANDOM

19.1 Overview

Fandom goes well beyond the avid sports fan suited up in a player or team jersey who tailgates and plays fantasy sports as well as tunes in to every game. It’s more than hours spent listening to recordings of a favorite musician and the collection of CDs. Fandom is a culture that includes fans of fictive worlds found in literature and comics, film and television, and videogames, where these fans express their appreciation through art, fashion, blogs, clubs, hobbies, conventions, and more.

Literature spawned the earliest form of modern fandom. Fiction featuring Sherlock Holmes inspired Sherlockians in the late 19th century to write parodies and pastiches that continue to this day – fans held public demonstrations and mourned when Holmes was ‘killed’ off in 1893. The Baker Street Irregulars (New York) and The Sherlock Holmes Society of London first formed in 1934. The current TV shows *Sherlock* and *Elementary* are both posting high viewer ratings.

As with the Sherlock Holmes stories that were recreated from print to TV and film and theater, most works popular in fandom include crossovers and tie-ins among various mediums. Lovers of all things Harry Potter, for example, many of whom call themselves Potterheads, have devoted much leisure time to reading all seven epic fantasy novels in the original books series (over one million words) and watching all eight films (over 20 hours). Younger Potterheads play the various video games, and many fans have visited the Potter-theme attractions at two U.S. amusement parks.

Leisure time dedicated to fandom includes time spent engaged with the original concept along with the derivative works, as well as time spent meeting up with other fans, often via social networks; creating art like drawings, fan fiction, or videos; and attending conventions, or cons.

It’s the interest in a favorite character that sparks in many the desire to become that character through cosplay, a portmanteau for costume play. Though some cosplayers commission others to design a costume, most dedicate much leisure time to handcrafting a costume, including hair and makeup, clothing and accessories, and gear. There are some cosplayers that recreate a costume capturing every detail exactly as the original character. Others tweak a look to suit their own style or personality. Others, still, take inspiration from characters to create an entirely original concept.

While drawing similar enthusiasm as fandom, reenactments, such as Medieval, Renaissance, and Regency reenactments, have historical context and often serve to educate as well as to entertain. Reenacting captures a specific event or period of history whereas fandom is based on fictive inventiveness. The time and expense spent
researching, crafting, and reenacting is as significant as with fandom for many enthusiasts, however.

19.2 Most Popular Fandom

The book series *A Song of Ice and Fire* – from which the wildly popular HBO series *Game of Thrones* originates – as well as Tolkien’s *Lord of the Rings* book series that spawned several films, have a global fan base. Much about fandom culture is, in fact, global.

Anime (TV/film animation) and manga (comics) originated in Japan and have a large following in the U.S. More than 50 anime conventions are held throughout the U.S. annually. Video games also have global appeal and numerous annual conventions held in the U.S.

The culture of fandom includes fans being dubbed a moniker based on the title/story of the concept. The following are among the most popular:

- Bronies: *My Little Pony: Friendship is Magic*
- Browncoats: *Firefly*
- Demigod: *Percy Jackson*
- Gleeks: *Glee*
- Hunters: *Supernatural*
- Initiates: *Divergent*
- Janeites: *Jane Austen*
- MSTies: *Mystery Science Theater 3000*
- Potterheads: *Harry Potter*
- Sherlockians: *Sherlock Holmes*
- Trekkies: *Star Trek*
- Tributes: *The Hunger Games*
- Whovians: *Doctor Who*

19.3 Conventions

Fandom conventions run the gamut, from anime to comics/manga to multi-genre and sci-fi. International in scope, the following is a selection of the most popular among various topics/types held in the United States:

**Anime**
- Ani-Jam (Fresno, CA)
- Animazement (Raleigh, NC)
- Anime Boston (Boston, MA)
- Anime Central (Rosemont, IL)
- Anime Detour (Bloomington, MN)
- Anime Expo (Los Angeles, CA)
- Anime Festival Orlando (Orlando, FL)
- Anime Festival Wichita (Wichita, KA)
• Anime Matsuri (Houston, TX)
• Anime Miami (Miami, FL)
• Anime Mid-Atlantic (Chesapeake, VA)
• Anime Midwest (Rosemont, IL)
• Anime Milwaukee (Milwaukee, WI)
• Anime NebrasKon (Omaha, NE)
• Anime Punch! (Columbus, OH)
• Anime USA (Washington, DC)
• Anime Weekend Atlanta (Atlanta, GA)
• AnimeFest (Dallas, TX)
• Animelowa (Coralville, IA)
• AnimeNEXT (Somerset, NJ)
• Aniwave (Wilmington, NC)
• Bak-Anime (Bakersfield, CA)
• ColossalCon (Sandusky, OH)
• Con-Nichiwa (Tucson, AZ)
• EvilleCon (Evansville, IN)
• FanimeCon (San Jose, CA)
• Ikasucon (Fort Wayne, IN)
• JAFAX (Allendale, MI)
• Japan Expo USA (San Mateo, CA)
• Kami-Con (Birmingham, AL)
• Katsucon (National Harbor, MD)
• Kawaii Kon (Honolulu, HI)
• KotoriCon (Sewell, NJ)
• Kumoricon (Vancouver, WA)
• Matsuricon (Columbus, OH)
• MechaCon (New Orleans, LA)
• Metrocon (Tampa, FL)
• Middle Tennessee Anime Convention (Murfreesboro, TN)
• Naka-Kon (Overland Park, KS)
• Nan Desu Kan (Denver, CO)
• NashiCon (Columbia, SC)
• No Brand Con (Eau Claire, WI)
• Ohayocon (Columbus, OH)
• OMGcon (Owensboro, KY)
• Otakon (Baltimore, MD)
• Otakon Vegas (Las Vegas, NV)
• PortConMaine (South Portland, ME)
• Project A-Kon (Dallas, TX)
• QC Anime-zing! (Davenport, IA)
• Quinni-Con (Hamden, CT)
• RealmsCon (Corpus Christi, TX)
• Saboten Con (Glendale, AZ)
• Sac-Anime (Sacramento, CA)
• Sakura-Con (Seattle, WA)
• San Japan (San Antonio, TX)
• Senshi-Con (Anchorage, AK)
• Shinboku-con (Huron, OH)
• SoDak Con (Rapid City, SD)
• Tekko (Pittsburgh, PA)
• Tokyo in Tulsa (Tulsa, OK)
• Tora-Con (Rochester, NY)
• Ushicon (Round Rock, TX)
• Yaoi-Con (Long Beach, CA)
• Youmacon (Detroit, MI)

**Comic (including Manga)**

• Alternative Press Expo (San Francisco, CA)
• Asbury Park Comicon (Asbury Park, NJ)
• Baltimore Comic-Con (Baltimore, MD)
• Big Apple Comic Con (New York City, NY)
• Chicago Comic & Entertainment Expo (Chicago, IL)
• ComicFest (Denver, CO)
• Comicpalooza (Houston, TX)
• Comikaze Expo (Los Angeles, CA)
• Dallas Comic Con (Dallas, TX)
• Denver Comic Con (Denver, CO)
• Detroit Fanfare (Dearborn, MI)
• Dragon*Con (Atlanta, GA)
• Emerald City Comicon (Seattle, WA)
• Heroes Convention (Charlotte, NC)
• MegaCon (Orlando, FL)
• Memphis Comic and Fantasy Convention (Memphis, TN)
• MoCCA Festival (New York City, NY)
• Motor City Comic Con (Novi, MI)
• New York Comic Con (New York City, NY)
• Ohio Comic Con (Columbus, OH)
• Phoenix Comicon (Phoenix, AZ)
• Pittsburgh Comicon (Monroeville, PA)
• Rose City Comic Con (Portland, OR)
• Salt Lake Comic Con (Salt Lake City, UT)
• San Diego Comic-Con International (San Diego, CA)
• Small Press and Alternative Comics Expo (Columbus, OH)
• Small Press Expo (Bethesda, MD)
• STAPLE! (Austin, TX)
• Wildcat Comic Con (Williamsport, PA)
• Wizard World Chicago (Chicago, IL)
- WonderCon (Anaheim, CA)

**Gaming**
- Archon (Collinsville, IL)
- Arisia (Boston, MA)
- BASHCon (Toledo, OH)
- BGG.CON (Irving, TX)
- BlizzCon (Anaheim, CA)
- CarnageCon (Killington, VT)
- ChargerCon (Huntsville, AL)
- Chattacon (Chattanooga, TN)
- CoastCon (Biloxi, MS)
- Comicpalooza (Houston, TX)
- CONduit (Salt Lake City, UT)
- ConnectiCon (Hartford, CT)
- DemiCon (Des Moines, IA)
- DexCon (Morristown, NJ)
- Dragon*Con (Atlanta, GA)
- DunDraCon (San Ramon, CA)
- E For All (Los Angeles, CA)
- Electronic Entertainment Expo [E3] (Los Angeles, CA)
- Fall In! (Adams County, PA)
- Games Workshop Games Day (Memphis, TN)
- GameStorm (Portland, OR)
- GameX (Los Angeles, CA)
- Gamicon (Iowa City, IA)
- Gary Con Lake Geneva, WI)
- Gateway Los Angeles, CA)
- GaymerX (San Francisco, CA)
- Gen Con (Indianapolis, IN)
- Genericon (Troy, NY)
- Historicon (Fredericksburg, VA)
- Hypericon (Nashville, TN)
- I-CON (Long Island, NY)
- Intercon (Chelmsford, MA)
- Lunacon Ryebrook, NY)
- MACE (Charlotte, NC)
- MAGFest (National Harbor, MD)
- MarCon (Columbus, OH)
- Marmalade Dog (Kalamazoo, MI)
- MegaCon (Orlando, FL)
- MEPACon (Scranton, PA)
- MidSouthCon (Memphis, TN)
- MineCon (Orlando, FL)
• MOBICON (Mobile, AL)
• MomoCon (Atlanta, GA)
• Northwest Pinball and Arcade Show (Seattle, WA)
• Norwescon (Seattle, WA)
• OrcCon (Los Angeles, CA)
• Origins Game Fair (Columbus, OH)
• OryCon (Portland, OR)
• Penguicon (Troy, MI)
• Penny Arcade Expo [PAX] East (Boston, MA)
• Penny Arcade Expo [PAX] Prime (Seattle, WA)
• Phoenix Comicon (Phoenix, AZ)
• PortConMaine (Portland, ME)
• PrezCon (Charlottesville, VA)
• PrinceCon (Princeton, NJ)
• QuakeCon (Dallas, TX)
• RadCon, Pasco, WA)
• RavenCon (Richmond, VA)
• RTX (Austin, TX)
• SGC (Dallas, TX)
• SpoCon (Spokane, WA)
• Stellarcon (High Point, NC)
• TooManyGames (Oaks, PA)
• U-Con (Ann Arbor, MI)
• Vericon (Cambridge, MA)
• Winter Fantasy (Fort Wayne, IN)
• World Boardgaming Championships (Lancaster, PA)

Multi-genre
• AggieCon (College Station, TX)
• All-Con (Dallas, TX)
• Animation On Display (San Francisco, CA)
• ApolloCon (Houston, TX)
• Archon (Collinsville, IL)
• Archon (Maryland Heights, MI)
• BronyCon (Baltimore, MD)
• CarnageCon (Killington, VT)
• Chattacon (Chattanooga, TN)
• CoastCon (Biloxi, MI)
• Comic-Con International (San Diego, CA)
• Comicpalooza (Houston, TX)
• ConGlomeration (Louisville, KY)
• ConnectiCon (Hartford, CT)
• Convention du Lac (Lake Charles, LA)
• Dragon*Con (Atlanta, GA)
• FAN:dom Con (Pensacola, FL)
• Fandemonium (Nampa, ID)
• Geek.Kon (Madison, WI)
• Genericon (Troy, NY)
• Glamourcon (Chicago, IL)
• Glamourcon (Los Angeles, CA)
• I-CON (Stony Brook, NY)
• JordanCon (Atlanta, GA)
• MegaCon (Orlando, FL)
• MidSouthCon (Memphis, TN)
• MOBICON (Mobile, AL)
• MomoCon (Atlanta, GA)
• MystiCon (Roanoke, VA)
• NerdaCon (Columbus, GA)
• New York Comic Con (New York, NY)
• Pacific Media Expo (Los Angeles, CA)
• Phoenix Comicon (Phoenix, AZ)
• Salt Lake Comic Con (Salt Lake City, UT)
• ShadowCon (Memphis, TN)
• SpoCon (Spokane, WA)
• Starfest (Denver, CO)
• Vericon (Cambridge, MA)
• WonderCon (San Francisco, CA)
• Zenkaikon (Lancaster, PA)

Sci-Fi
• AggieCon (College Station, TX)
• Albacon (Albany, NY)
• All-Con (Dallas, TX)
• Angels and Aliens (Columbus, OH)
• ApolloCon (Houston, TX)
• Archon (St. Louis, MO)
• Arisia (Boston, MA)
• Arse Elektronika (San Francisco, CA)
• ArmadilloCon (Austin, TX)
• BabelCon (Baton Rouge, LA)
• Balticon (Baltimore, MD)
• BayCon (Santa Clara, CA)
• Boskone (Boston, MA)
• BotCon (various locations)
• Bubonicon (Albuquerque, NM)
• Capclave (Washington, DC)
• Capricon (Wheeling, IL)
• Chattacon (Chattanooga, TN)
• CoastCon (Biloxi, MI)
• Con†Stellation (Huntsville, AL)
• ConCarolinas (Charlotte, NC)
• ConClave (Romulus, MI)
• ConDFW (Richardson, TX)
• CONduit (Salt Lake City, UT)
• Conestoga (Tulsa, OK)
• Confluence (Pittsburgh, PA)
• ConFusion (Ann Arbor, MI)
• ConGloreration (Louisville, KY)
• Conjecture (San Diego, CA)
• ConQuest (Kansas City, MO)
• CONvergence (Bloomington, MN)
• Comikaze Expo (Los Angeles, CA)
• DemiCon (Des Moines, IA)
• Diversicon (Saint Paul, MN)
• Dragon*Con (Atlanta, GA)
• DucKon (Schaumburg, IL)
• EerieCon (Niagara Falls, NY)
• Eternal Con (Garden City, NY)
• FenCon (Dallas, TX)
• Gallifrey One (Los Angeles, CA)
• Gaylaxicon (Atlanta, GA)
• Geek.Kon (Madison, WI)
• GenCon (Indianapolis, IN)
• G-Fest (Rosemont, IL)
• Hypericon (Nashville, TN)
• Icon (Cedar Rapids, IA)
• I-CON (Hempstead, NY)
• InConJunction (Indianapolis, IN)
• Lazy Dragon Con (McKinney, TX)
• LepreCon (Phoenix, AZ)
• Life, the Universe, & Everything (Orem, UT)
• Lunacon (Rye Brook, NY)
• Marcon (Columbus, OH)
• MarsCon (Bloomington, MN)
• MarsCon (Williamsburg, Virginia, VA)
• MediaWest*Con (Lansing, MI)
• MegaCon (Orlando, FL)
• MidSouthCon (Memphis, TN)
• Midwestcon (Cincinnati, OH)
• MileHiCon (Denver, CO)
• Minicon (Minneapolis, MN)
• MOBICON (Mobile, AL)
• MomoCon (Atlanta, GA)
• MystiCon (Roanoke, VA)
• Nebula Awards Weekend (San Jose, CA)
• North American Science Fiction Convention (various locations)
• Norwescon (Seattle, WA)
• OryCon (Portland, OR)
• Penguicon (Pontiac, MI)
• Philcon (Philadelphia, PA)
• RadCon (Pasco, WA)
• RavenCon (Richmond, VA)
• Readercon (Boston, MA)
• Sci-Fi Valley Con (Altoona, PA)
• ShadowCon (Memphis, TN)
• Soonercon (Oklahoma City, OK)
• SpoCon (Spokane, Washington)
• Star Wars Celebration (Orlando, FL)
• Starbase Indy (Indianapolis, IN)
• Starfest (Denver, CO)
• STARFLEET International Conference (Dallas, TX)
• Stellarcon (Greensboro, NC)
• TimeGate (Atlanta, GA)
• TrekTrax Atlanta (Atlanta, GA)
• TusCon (Tucson, AZ)
• UnCommonCon (Dallas, TX)
• Vericon (Cambridge, MA)
• Westercon (Sacramento, CA)
• WillyCon (Wayne, NE)
• Windycon (Lombard, IL)
• WisCon (Madison, WI)
• Wizard World (various locations)
• WonderCon (Anaheim, CA)

Several events are categorized as more than multi-genre and appear variously under different categories. Similarly, the culture of fandom often sees an overlap among fans. Many fans of anime and manga, for example, are also fans of sci-fi and videogaming.
20

FANTASY SPORTS

20.1 Market Assessment

The Fantasy Sports Trade Association (FSTA, www.fsta.org) estimates that 37 million American adults played fantasy sports in 2013. Those who play fantasy sports spend, on average, 8.7 hours per week engaged in the activity. Players have typically been playing fantasy sports for 9.5 years.

FSTA estimates spending for fantasy sports in 2013 at $2 billion, distributed as follows:

<table>
<thead>
<tr>
<th>Per Player</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>League fees:</td>
<td>$52</td>
</tr>
<tr>
<td>Information materials:</td>
<td>$20</td>
</tr>
<tr>
<td>Challenge games:</td>
<td>$15</td>
</tr>
<tr>
<td>Website hosting fees:</td>
<td>$9</td>
</tr>
<tr>
<td>Transaction fees:</td>
<td>$8</td>
</tr>
<tr>
<td>Website prize fees:</td>
<td>$7</td>
</tr>
</tbody>
</table>

20.2 Demographics

FSTA surveys provide the following profile of fantasy sports participants:

<table>
<thead>
<tr>
<th>Males</th>
<th>Females</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average age:</td>
<td>37</td>
<td>33</td>
</tr>
<tr>
<td>Average household size:</td>
<td>3½</td>
<td>2</td>
</tr>
<tr>
<td>Education (B.S. degree or higher):</td>
<td>73%</td>
<td>54%</td>
</tr>
<tr>
<td>Attended some college:</td>
<td>93%</td>
<td>81%</td>
</tr>
<tr>
<td>Average household income:</td>
<td>$91k</td>
<td>$65k</td>
</tr>
<tr>
<td>Sports leagues played in:</td>
<td>2.1</td>
<td>1.6</td>
</tr>
<tr>
<td>Average years played fantasy sports:</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Average number of leagues per year:</td>
<td>6.6</td>
<td>2.2</td>
</tr>
<tr>
<td>Play free only (all fantasy sports):</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Started playing online:</td>
<td>40%</td>
<td>75%</td>
</tr>
<tr>
<td>Weekly time managing their fantasy teams:</td>
<td>3.2</td>
<td>2.6</td>
</tr>
<tr>
<td>Married:</td>
<td>69%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Female participation in fantasy sports has increased substantially over the past decade. As recently as 2000, fantasy leagues were almost exclusively a male domain, with women comprising less than 3% of all players, by most estimates. Today, at
roughly 15%, women represent a significant – and growing – portion of the fantasy sports population.

Ipsos Public Affairs (www.ipsos-na.com) reported in June 2014 that 6% of adult women in the U.S. play fantasy sports, compared with 22% of men who do so.

### 20.3 Market Characteristics and Trends

Fantasy players create teams using real statistics from actual players and compete with other players in a league based on the performance of their fantasy team. Leagues typically consist of between eight and 14 teams. Fantasy players pay an entry fee to play; winning players receive cash prizes.

“In a typical league, a dozen or so participants chip in money – $20 on the low end and $1,300 or more for high-stakes contests. The team with the best aggregate statistics wins at the end of the regular season and takes the lion’s share of prize money.”

*Forbes*

League winners can earn a grand prize of $100,000 in national competitions such as NBC Sports’ national fantasy baseball competition, a season-long contest of 26 leagues and 309 teams.

Most fantasy sport players play multiple sports, with football being the most popular. According to the FSTA, the following are percentages of participants and total spending for the five most popular sports:

<table>
<thead>
<tr>
<th>Sport</th>
<th>Participation</th>
<th>Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Football</td>
<td>93%</td>
<td>48%</td>
</tr>
<tr>
<td>Baseball</td>
<td>70%</td>
<td>33%</td>
</tr>
<tr>
<td>Basketball</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>Hockey</td>
<td>24%</td>
<td>3%</td>
</tr>
<tr>
<td>NASCAR</td>
<td>23%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Major media companies, including CBS, ESPN, Fox, and Yahoo!, have become active in the fantasy sports business operating leagues and providing services to players. While most fantasy operators previously charged players a fee to play, more leagues are now free. A company like CBS makes money by selling to players a range
of products, such as draft guides and expert analysis, and through advertising. Fantasy sports is supported by about a dozen magazines, about 200 websites (some fee-based), and countless amateur blogs. Fantasy sports is considered a game of skill rather than gambling. As such, the Unlawful Internet Gambling Enforcement Act of 2008 specifically excluded any prohibitions for fantasy sports.

“DraftKings and FanDuel, as well as larger sites like Yahoo!, have tried to distance themselves from other kinds of online gambling, emphasizing that knowledge and skill are rewarded rather than pure luck.”

The New York Times, 7/28/14

20.4 Fantasy Football
A survey by Turnkey Sports (www.turnkeysports.com) found that 91% of fantasy sports participants play fantasy football. Among these players, activities are as follows:

Number of fantasy football leagues participated in:
• One: 40%
• Two: 35%
• Three: 16%
• Four or more: 9%

Websites used for fantasy football league(s):
• ESPN.com: 55%
• NFL.com: 46%
• Yahoo.com: 42%
• SportsLine.com: 19%
• FantasySportsLive.com: 17%

Entry fee paid for fantasy football league:
• Free: 38%
• $1 to $25: 23%
• $26 to $50: 14%
Frequency in checking player statistics:
- Daily: 38%
- A few times per week: 32%
- A few times per day: 18%
- Once per week: 10%

Visit to websites of fantasy league sponsors:
- A few times per week: 29%
- Daily: 20%
- Never: 15%
- Less than once per week: 13%
- A few times per day: 12%
- Once per week: 11%

Have become a more avid fan of NFL since started playing fantasy football:
- Agree somewhat: 39%
- Agree completely: 32%
- Neither agree nor disagree: 17%
- Disagree somewhat: 10%
- Disagree completely: 2%

Feel worse when fantasy team loses than when favorite NFL team loses:
- Agree somewhat: 28%
- Neither agree nor disagree: 22%
- Disagree somewhat: 18%
- Agree completely: 17%
- Disagree completely: 15%

20.5 Fantasy Sports and Professional Sports Leagues
In past years, professional sports leagues avoided involvement with fantasy sports because of the possible link with wagering activities. This has changed, and MLB, the NBA, and the NFL all provide support for fantasy players.

Major League Baseball has a partnership with DraftKings (www.draftkings.com), which offers a daily contest on MLB.com in which prizes include tickets to games rather than cash.

The National Football League hosts season-long leagues on its website; provides fantasy analysis of players and winning strategies; and offers Fantasy Ultimate Experience Leagues, pay-to-enter contests with authentic jerseys, and memorabilia as prizes.

The National Basketball Association website (www.nba.com) has a Fantasy Central feature that provides player rankings, @NBAFantasy Draft Results, and other insight for fantasy players.
“The surprise has been that professional leagues – traditionally ferocious opponents of gambling on their sports, online or off – have quietly embraced gambling on fantasy sports, apparently aware that the passion for it is crucial to their bottom lines.”

The New York Times, 7/28/14

20.6 High-Stakes Fantasy Leagues
At the pinnacle of fantasy sports are football leagues where winning participants can make as much as $300,000 in a good year.

“The Diamond [National Fantasy Football Championship’s Diamond League] may well be the world’s most serious fantasy football league. The entry fee is $10,000. The winner stands to pocket $80,000. It is the most expensive among more than 300 pay-to-play leagues run by the sports information company Stats, which holds its drafts in Las Vegas, New York, and Chicago, as well as online. More than 1,000 players, nearly all of them men, will spend a combined $2 million for the right to manage some 4,000 teams in Stats football leagues this season. There are a handful of other companies with high-stakes leagues, but none with a five-figure entry fee.”

Bloomberg Businessweek, 10/17/13
20.7 Market Resources

Fantasy Sports Business (www.fantasysportsbusiness.com) - an online newsletter

Fantasy Sports Trade Association. (312) 771-7019. (www.fsta.org)
21

FASHION

21.1 Overview
A few thousand people in the U.S. find a career in fashion design; millions enjoy fashion as a hobby, with activities ranging from designing and making their own clothes to following trends in fashion.

People with fashion as a hobby, often referred to as fashionistas, follow the latest fashions, designers and design houses, fashion shows, and models similar to the way sports fans follow teams and their favorite players.

21.2 Fashion Museums and Exhibitions
The following are fashion museums in the U.S.:

- FIDM Museum & Galleries - Fashion Institute of Design & Merchandising (Los Angeles, CA; http://fashionmuseum.org/exhibitions/upcoming/)
- Kent State University Museum (Kent, OH; http://www2.kent.edu/museum/index.cfm)
- Museum at the Fashion Institute of Technology (New York, NY; www.fitnyc.edu/museum.asp)
- Museum of Arts and Design (New York, NY; www.madmuseum.org)
- Texas Fashion Collection at University of North Texas (Denton, TX; www.tfc.unt.edu)
- The Costume Institute at the Metropolitan Museum of Art (New York, NY; www.metmuseum.org/works_of_art/department.asp?dep=8)
- The Fabric Workshop and Museum (Philadelphia, PA; www.fabricworkshopandmuseum.org)

_________________________________________________________________
“Museums have discovered the magic formula for making the exclusive world of high fashion accessible to everybody for the price of an entry ticket, seen through the lens of art.”

Forbes
The following were fashion-themed exhibitions at museums in 2014:

- *A Day at the Beach* at Kent State University Museum (Kent, OH)
- *An American Legacy: Norell, Blass, Halston and Sprouse* at Indianapolis Museum of Art (Indianapolis, IN)
- *Charleston Couture* at the Charleston Museum (Charleston, SC)
- *Fashion A-Z - Part 2* at Fashion Institute of Technology (New York, NY)
- *Gerlan Jeans Loves Patrick Kelly* at Philadelphia Museum of Art (Philadelphia, PA)
- *Herb Ritts: L.A. Style* at the Getty Museum (Los Angeles, CA)
- *Native American Bolo Ties* at Albuquerque Museum (Albuquerque, NM) and Heard Museum (Phoenix, AZ)
- *On the Home Front: Civil War Fashions and Domestic Life* at Kent State University Museum (Kent, OH)
- *Out of Fashion* at Cameron Art Museum (Wilmington, NC)
- *Pret-a-Papier* at Hillwood Museum (Washington, DC)
- *The Fashion World of Jean Paul Gaultier: From the Sidewalk to the Catwalk* at Brooklyn Museum and de Young Museum (San Francisco, CA)
- *The Guayabera: A Shirt’s Story* at History of Miami Museum (Miami, FL)
- *Worn to be Wild* at Harley Davidson Museum (Milwaukee, WI)
- *Young Brides, Old Treasures: Macedonian Embroidered Dress* at International Folk Art Museum (Santa Fe, NM)
- *Yves Saint Laurent: The Retrospective* at Denver Art Museum (Denver, CO)

### 21.3 Fashion Shows

Among the hundreds of fashion shows held in the U.S. each year, while some focus on professional fashion buyers, some appeal primarily to consumers; most shows appeal to both audiences.

Victoria’s Secret Fashion Show, held annually in New York City since 1995 and broadcast on CBS since 2001, is the most popular among consumers. The show sells out the 5,000-seat arena at the 69th Regiment Armory months in advance; tickets for the November 2014 show: $16,000 on the secondary ticket market.

Television viewership has been as follows:

- 2008: 8.7 million
- 2009: 8.3 million
- 2010: 9.0 million
- 2011: 10.3 million
- 2012: 9.5 million
- 2013: 9.7 million

Retailers have been presenting fashion shows for their customers and the general public since the early 20th century and the shows remain popular, often attracting an audience of thousands.
The most popular among retail fashion shows is Macy’s Glamorama (www.macys.com/campaign/social?campaign_id=157&channel_id=1), held annually in Chicago, Los Angeles, Minneapolis, and San Francisco. Glamorama features top American and international fashion designers and celebrities.

Since 1946, the Metropolitan Museum of Art’s Costume Institute in New York City has presented the Costume Institute Gala (commonly called the Met Gala), a fundraising gala that marks the grand opening of the Costume Institute’s annual fashion exhibit. With a guest list of only 650 to 700 people, it is widely regarded as one of the most exclusive social events in New York. Following the event, the exhibition runs for several months. The 2014 exhibition ran from May 8 until August 10.

Rip The Runway, an annual fashion show and music show broadcast by BET, has been held since 2007 at the Hammerstein Ballroom in New York City.

New York Fashion Week (www.newyorkfashionweek.buzz) launched in 1943 to show international fashion collections to buyers, the press, and the general public. The event is now held in February and September each year and is one of five major fashion weeks in the world, along with those in Paris, London, Berlin, and Milan. It consists of numerous branded events including Mercedes-Benz Fashion Week New York and MADE Fashion Week.

Los Angeles Fashion Week (www.lafashionweek.org) debuted in the 1950s and now ranks among the Top 10 fashion events worldwide.

Men’s Fashion Week is held in conjunction with New York Fashion Week and Los Angeles Fashion Week.

Mercedes-Benz Fashion Week Miami works together with New York Fashion Week and is the country’s largest fashion week for swimwear.

The following are other fashion week shows:

- Dallas Fashion Week (www.fashionweekdallas.com)
- Detroit Fashion Week (www.detroitfashionweek.com)
- Fashion Week Cleveland (www.fashionweekcleveland.com)
- Houston Fashion Week (www.houstonfashionweek.com)
- Knoxville Fashion Week (www.knoxvillefashionweek.com)
- Miami Fashion Week (www.miamifashionweek.com)
- Midwest Fashion Week (Indianapolis, IN; www.midwestfashionweek.com)
- Phoenix Fashion Week (www.phoenixfashionweek.com)
- Pittsburgh Fashion Week (www.pittsburghfashionweek.com)
- Portland Fashion Week (www.portlandfashionweek.net)

The launch of fashion weeks outside of the fashion capitals of New York and Los Angeles and the companion shows have been well received.
“A glamorous model clumps down the runway. Photographers snap. Fashion editors applaud. And for a moment, it seems as if all eyes in the couture world are on ... Knoxville? Such is the burgeoning business of smaller-town fashion weeks. For decades, the world’s clothing trends stemmed from seasonal spectacles in just four cities: New York, London, Milan and Paris. But in recent years, Dallas, Knoxville, and others have launched alternatives to hype local models and retailers.”

*Time, 10/15/13*

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21.4 Fashion Media

The following are the most popular fashion magazines, ranked by circulation (source: Publishers Information Bureau [www.magazines.org]):

- **Glamour**: 2.3 million
- **Redbook**: 2.2 million
- **InStyle**: 1.7 million
- **Vogue**: 1.3 million
- **Vanity Fair**: 1.2 million
- **Elle**: 1.1 million
- **Lucky**: 1.1 million
- **Allure**: 1.0 million
- **Teen Vogue**: 1.0 million
- **GQ**: 960,000
- **Marie Claire**: 970,000
- **Harper’s Bazaar**: 730,000
- **Cliché**: 600,000
- **Complex**: 500,000
- **W**: 460,000

There are several thousand fashion-focused websites and blogs, the most popular of which include *CollegeFashion.net, Fashionista.com, Fashionologie.com, LimeLife.com, MyFashionLife.com, MyFDB.com, New York Magazine Fashion Blog* (http://nymag.com/thecut/), *Style.com, and TheSartorialist.com.*
There are several fashion-themed reality shows, of which *Project Runway* is the most popular. Since its debut in 2014, the show has expanded to include several international versions and consistently scores high viewership ratings – an average 2 million viewers in 2014 down from a peak of 5 million in 2007.

*Under the Gunn*, a spin-off from *Project Runway*, debuted in 2014. *Threads*, a teen version of *Project Runway*, and a docu-reality show with Diane von Furstenberg are in production.

Shows featuring celebrity stylists, like *The Rachel Zoe Project*, are also popular with viewers.

### 21.5 Academic Programs

The following are leading programs in fashion at U.S. colleges and universities:

- Academy of Art University (San Francisco, CA; [www.academyart.edu/academics/fashion](http://www.academyart.edu/academics/fashion))
- Auburn University, Apparel Design and Merchandising (Auburn, AL; [http://humsci.auburn.edu/cahs/bs-amdp.php](http://humsci.auburn.edu/cahs/bs-amdp.php))
- California College of Arts (San Francisco and Oakland, CA; [www.cca.edu/academics/fashion-design](http://www.cca.edu/academics/fashion-design))
- Columbia College, Fashion Studies (Chicago, IL; [www.colum.edu/Admissions/Programs/Fashion.php](http://www.colum.edu/Admissions/Programs/Fashion.php))
- Columbus College of Art & Design (Columbus, OH; [www.ccad.edu/programs-of-study/majors/fashion-design/](http://www.ccad.edu/programs-of-study/majors/fashion-design/))
- Cornell University, Fiber Science and Apparel Design (Ithaca, NY; [www.human.cornell.edu/fsad](http://www.human.cornell.edu/fsad))
- Drexel University, Westphal College of Media Arts & Design (Philadelphia, PA; [www.drexel.edu/westphal/](http://www.drexel.edu/westphal/))
- Fashion Institute of Design & Merchandising (Los Angeles, CA; [www.fidu.edu](http://www.fidu.edu))
- Fashion Institute of Technology (New York, NY; [www.fitnyc.edu](http://www.fitnyc.edu))
- Iowa State University; Apparel, Merchandising and Design (Ames, IA; [www.hs.iastate.edu/academics/majors-list/apparel-merchandising-design](http://www.hs.iastate.edu/academics/majors-list/apparel-merchandising-design))
- Kent State University, Fashion School (Kent, OH; [www.fashionschool.kent.edu](http://www.fashionschool.kent.edu))
- Massachusetts College of Art (Boston, MA; [www.massart.edu/Academic_Programs/Fashion_Design.html](http://www.massart.edu/Academic_Programs/Fashion_Design.html))
- Oregon State University (Corvallis, OR; [http://business.oregonstate.edu/prospective/undergraduate/disciplines/apparel](http://business.oregonstate.edu/prospective/undergraduate/disciplines/apparel))
- Otis College of Art and Design (Los Angeles, CA; [www.otis.edu](http://www.otis.edu))
- Parsons, the New School for Design (New York, NY; [www.newschool.edu/parsons/](http://www.newschool.edu/parsons/))
- Pratt Institute, School of Design (Brooklyn, NY; [www.pratt.edu/academics/school-of-design/undergraduate-school-of-design/fashion/](http://www.pratt.edu/academics/school-of-design/undergraduate-school-of-design/fashion/))
- Rhode Island School of Design (Providence, RI; [www.risd.edu](http://www.risd.edu))
• Savannah College of Art and Design (Savannah, GA; www.scad.edu/academics/programs/fashion)
• School of the Art Institute of Chicago (Chicago, IL; www.saic.edu/academics/departments/fash)
• Syracuse University, Fashion Design (Syracuse, NY; http://vpa.syr.edu/art-design/design/undergraduate/fashion-design)
• The Art Institutes (52 campuses; http://new.artinstitutes.edu/areasofstudy/Fashion-Design/detail/51)
• University of Cincinnati, School of Design (Cincinnati, OH; http://daap.uc.edu/academics/design/bs_fashion.html)
• University of Delaware, Department of Apparel and Fashion Studies (Newark, DE; www.fashion.udel.edu)
• University of Missouri, Textile & Apparel Management (Columbia, MO; http://tam.missouri.edu)
• University of Nebraska, Textiles, Merchandising and Fashion Design Department (Lincoln, NE; http://cehs.unl.edu/tmfd)
• Virginia Tech University, Apparel Product Design and Merchandising (Blacksburg, VA; www.ahrm.vt.edu/apparel/index.html)
• West Virginia University, Fashion Design and Merchandising (Morgantown, WV; www.fashion.wvu.edu)

21.6 Market Resources


22.1 Market Assessment

According to the U.S. Travel (www.ustravel.org), approximately two million annually recurring events are hosted each year in North America. The spectrum is broad, with events ranging from state fairs to air shows to film festivals and more.

The International Festivals & Events Association (www.ifea.com) estimates total attendance at these events at 405 million. The economic impact is $25 billion.

Approximately 3,250 fairs are held annually in the United States and Canada, according to the International Association of Fairs and Expositions (www.fairsandexpos.com). Approximately 150 million visitors attend these events.

According to Carnival Warehouse, the Top 50 annual fairs attract more than 40 million people annually.

22.2 Top 100 Events

The American Bus Association (ABA, www.buses.org) annually compiles a list of the Top 100 events for group travel. The list is selected by a committee of ABA-member motorcoach and tour operators. The following events and festivals comprised the list for 2014:

**Alabama**
- BayFest (Mobile; 10/3/2014 - 10/5/2014)
- Events Commemorating the 50th Anniversaries of Alabama Civil Rights Movement (Birmingham and Montgomery; 1/1/2014 - 12/2015)

**Alaska**
- Festival of Native Arts (Fairbanks; 2/27/2014 - 3/1/2014)

**Arizona**
- Havasu Balloon Festival & Fair (Lake Havasu City; 1/17/2014 - 1/19/2014)
- Western Winter Blast XXV (Lake Havasu City; 2/12/2014 - 2/16/2014)
<table>
<thead>
<tr>
<th>State</th>
<th>Event</th>
<th>Date Range</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Midnight Sun Festival</td>
<td>Fairbanks; 6/22/2014</td>
</tr>
<tr>
<td>California</td>
<td>Farm-to-Fork Festival</td>
<td>Sacramento; 9/20/2014 - 9/27/2014</td>
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<tr>
<td></td>
<td>Gold Rush Days</td>
<td>Sacramento; 8/29/2014 - 9/1/2014</td>
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<tr>
<td></td>
<td>Indian Wells Arts Festival</td>
<td>Indian Wells; 4/4/2014 - 4/6/2014</td>
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<tr>
<td></td>
<td>Tournament of Roses</td>
<td>Pasadena; 1/1/2014</td>
</tr>
<tr>
<td>Colorado</td>
<td>Cherry Creek Arts Festival</td>
<td>Denver; 7/4/2014 - 7/6/2014</td>
</tr>
<tr>
<td></td>
<td>Colorado Balloon Classic</td>
<td>Colorado Springs; 8/30/2014 - 9/1/2014</td>
</tr>
<tr>
<td></td>
<td>Donkey Derby Days</td>
<td>Cripple Creek; 6/28/2014 - 6/29/2014</td>
</tr>
<tr>
<td>Delaware</td>
<td>Delaware Wine &amp; Beer Festival</td>
<td>Dover; 10/19/2014</td>
</tr>
<tr>
<td></td>
<td>World Championship Punkin Chunkin</td>
<td>Nassau; 10/31/2014 - 11/2/2014</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>Big Band Jam! (Washington)</td>
<td>4/18/2014 - 4/30/2014</td>
</tr>
<tr>
<td>Florida</td>
<td>Daytona 500</td>
<td>Daytona Beach; 2/23/2014</td>
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<tr>
<td></td>
<td>Gasparilla Pirate Fest</td>
<td>Tampa; 1/1/2014</td>
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<tr>
<td></td>
<td>The Great Gulfcoast Arts Festival</td>
<td>Pensacola; 11/7/2014 - 11/9/2014</td>
</tr>
<tr>
<td>Georgia</td>
<td>Savannah Tour of Homes &amp; Gardens</td>
<td>Savannah; 3/27/2014 - 3/30/2014</td>
</tr>
<tr>
<td></td>
<td>Galena Oktoberfest</td>
<td>Galena; 10/4/2014</td>
</tr>
</tbody>
</table>
Indiana
• 52nd Annual Amish Acres Arts & Crafts Festival (Nappanee; 7/31/2014 - 8/3/2014)
• Indy 500 Celebration (Indianapolis; 5/25/2014)
• Quilt Gardens along the Heritage Trail (Elkhart; 5/30/2014 - 10/1/2014)

Kansas
• Amelia Earhart Festival (Atchison; 7/18/2014 - 7/19/2014)
• Dodge City Days (Dodge City; 7/25/2014 - 8/3/2014)

Kentucky
• Belle’s Big Birthday Bash, A Centennial Celebration (Louisville; 10/15/2014 - 10/19/2014)
• Christmas at the Galt House Hotel (Louisville; 11/15/2014 - 1/1/2015)
• Kentucky Bourbon Festival (Bardstown; 9/16-2014 - 9/28/2014)
• Kentucky Derby Festival & Kentucky Derby (Louisville; 4/12/2014 - 5/3/2014)
• Southern Lights (Lexington; 11/21/2014 - 12/31/2014)

Louisiana
• 43rd Annual Louisiana Gumbo Festival of Chackbay (Thibodaux; 10/10/2014 - 10/12/2014)
• Mardi Gras (New Orleans; 3/4/2014)
• Mardi Gras Bash (Shreveport; 2/22/2014)

Maine
• Kennebunkport Christmas Prelude (Kennebunkport; 12/5/2014 - 12/13/2014)
• Maine Lobster Festival (Rockland; 7/30/2014 - 8/3/2014)
• Windjammer Days Festival (Boothbay Harbor; 6/24/2014 - 6/25/2014)

Maryland
• 18th Century Market Fair (Hagerstown; 4/24/2014 - 4/27-2014)
• Star-Spangled Spectacular (Baltimore; 9/6/2014 - 9/16/2014)
• Winterfest of Lights (Ocean City; 11/20/2014 - 1/4/2015)

Massachusetts
• 33rd Annual Boston Harborfest (Boston; 7/1/2014 - 7/6/2014)
• America’s Hometown Thanksgiving Celebration (Plymouth; 11/22/2014 - 11/24/2014)
• Bourne Scallop Festival (Bourne; 9/19/2014 - 9/21/2014)
• Bright Nights at Forest Park (Springfield; 11/26/2014 - 1/1/2015)
• Haunted Happenings (Salem; 10/1/2014 - 10/31/2014)
• Pops by the Sea Concert (Hyannis; 8/9/2014)
• The Big E (West Springfield; 9/12/2014 - 9/28/2014)
Michigan
- Holland Tulip Time Festival (Holland; 5/3/2014 - 5/10/2014)
- National Cherry Festival (Traverse City; 7/5/2014 - 7/12/2014)

Minnesota
- Grand Portage Rendezvous Days & Pow-Wow (Grand Portage; 8/7/2014 - 8/10/2014)
- Saint Paul Winter Carnival (Saint Paul; 1/23/2014 - 2/2/2014)

Mississippi
- Christmas at Beauvoir - Festival of Trees (Biloxi; 11/6/2014 - 1/5/2015)
- Cruisin’ The Coast (Biloxi; 10/5/2014 - 10/12/2014)
- Peter Anderson Arts & Crafts Festival (Ocean Springs; 11/1/2014 - 11/2/2014)

Missouri
- Birthplace of Route 66 Festival (Springfield; 8/9/2014)
- Christmas Traditions (St. Charles; 11/28/2014 - 12/24/2014)
- Old Time Music Ozark Heritage Festival (West Plains; 6/20/2014 - 6/21/2014)
- Ozark Mountain Christmas (Branson; 11/1/2014 - 12/31/2015)

Montana
- Crow Fair & Rodeo (Crow Agency; 8/16/2014 - 8/17/2014)

Nebraska
- North Platte Rail Fest (North Platte; 9/19/2014 - 9/21/2014)

New Hampshire
- Annual League of NH Craftsmen Fair (Concord; 8/3/2014 - 8/11/2014)
- Hampton Beach Seafood Festival (Hampton; 9/5/2014 - 9/7/2014)
- Vintage Christmas in Portsmouth (Portsmouth; 12/1/2014 - 12/31/2014)

New Mexico
- Christmas at the Pecos (Carlsbad; 11/28/2014 - 12/31/2014)

New York
- GlassFest 2014 (Corning; 5/22/2014 - 5/26/2014)
- Historic Lewiston Jazz Festival (Lewiston; 8/22/2014 - 8/23/2014)
- Macy’s Thanksgiving Day Parade (New York; 11/27/2014)
North Carolina
• Carolina Renaissance Festival (Huntersville; 10/4/2014 - 11/23/2014)
• Christmas at Biltmore (Asheville; 11/7/2014 - 1/4/2015)
• Christmas at the Library (Charlotte; 12/1/2014 - 12/23/2014)
• Queen’s Cup Steeplechase (Mineral Springs; 4/26/2014)

North Dakota
• Medora Musical (Medora; 6/5/2014 - 9/6/2014)
• Norsk Høstfest (Minot; 9/30/2014 - 10/4/2014)

Ohio
• Dublin Irish Festival (Dublin; 8/1/2014 - 8/3/2014)

Oregon
• Feast Portland (Portland; 9/18/2014 - 9/21/2014)
• Portland Rose Festival (Portland; 5/23/2014 - 6/8/2014)

Pennsylvania
• Christmas in Hershey (Hershey; 11/14/2014 - 1/1/2015)
• Chrysanthemum Festival at Longwood Gardens (Kennett Square; 10/25/2014 - 11/23/2014)
• Gettysburg National Civil War Battle Reenactment (Gettysburg; 7/4/2014 - 7/6/2014)
• MummersFest & FancyBrigade Finale (Philadelphia; 1/1/2014)

Rhode Island
• The Newport Flower Show (Newport; 6/27/2014 - 6/29/2014)

South Carolina
• Myrtle Beach Holiday FantaSea (Myrtle Beach; 11/4/2014 - 11/18/2014)
• South Carolina Apple Festival (Walhalla; 9/2/2014 - 9/7/2014)

South Dakota
• Corn Palace Festival (Mitchell; 8/21/2014 - 8/25/2014)
• Custer State Park Annual Buffalo Roundup & Arts Festival (Custer; 9/26/2014 - 9/28/2014)

Tennessee
• Elvis Week (Memphis; 8/11/2014 - 8/17/2014)
• Rivers & Spires Festival (Clarksville; 4/24/2014 - 4/26/2014)
Texas
• Christmas Capital of Texas (Grapevine; 11/14/2014 - 1/4/2015)
• Denton Arts & Jazz Festival (Denton; 4/25/2014 - 4/27/2014)
• Fiesta San Antonio (San Antonio; 4/17/2014 - 4/27/2014)
• Fort Worth Stock Show & Rodeo (Fort Worth; 1/17/2014 - 2/8/2014)
• Texas Rose Festival (Tyler; 10/16/2014 - 10/19/2014)

Virginia
• Busch Gardens Christmas Town (Williamsburg; 11/21/2014 - 12/31/2014)
• Colonial Williamsburg’s Grand Illumination (Williamsburg; 12/7/2014)
• Virginia Beach Neptune Festival (Virginia Beach; 9/25/2014 - 9/28/2014)
• Virginia International Tattoo (Norfolk; 4/24/2014 - 4/27/2014)

West Virginia
• New River Gorge Bridge Day (Oak Hill; 10/18/2014)

Wyoming
• Buffalo Bill Cody Stampede Rodeo (Cody; 7/1/2014 - 7/4/2014)
• Cheyenne Frontier Days (Cheyenne; 7/18/2014 - 7/27/2014)

22.3 Arts Fairs and Events
Arts and cultural festivals explore various mediums of art, ranging from fine arts to DIY and crafting, to music and film, to literary arts and more. This chapter explores the vast array – over 10,000 – of cultural events held annually throughout the U.S.

Art Basel Miami Beach (www.artbasel.com/en/Miami-Beach), which in December 2013 featured art priced at between $2,000 to $20 million and attracted a record 75,000 visitors in its 12th year, is the nation’s largest art fair. An analysis by the Greater Miami Convention and Visitors Bureau estimates the economic impact to the city’s local economy at $500 million.
“Just in the non-profit art world it’s $1.1 billion a year that gets produced in Miami-Dade County. I think you can conservatively double that number if you took into account all the commercial activity that goes on in here as well. I would estimate more than $2 billion of economic activity attributable to the arts and cultural events.”

Michael Spring, Director
Department of Cultural Affairs
Miami Today, 12/11/13

American Style rates the following as top arts fairs and festivals in the United States:
• Ann Arbor Street Art Fair, the Original (Ann Arbor, MI; www.artfair.org)
• Des Moines Arts Festival (Des Moines, IA; www.desmoinesartsfestival.org)
• Festival of Fine Craft (Millville, NJ; www.wheatonarts.org)
• Kentucky Crafted: The Market (Louisville, KY; http://kycraft.ky.gov/)
• LaQuinta Arts Festival (LaQuinta, CA; www.lqaf.com)
• Old Town Art Fair (Chicago, IL; www.oldtowntriangle.com)
• Paradise City Arts Festival (Northampton, MA; www.paradisecityarts.com)
• Scottsdale Arts Festival (Scottsdale, AZ; www.scottsdaleartsfestival.org)
• St. James Court Art Show (Louisville, KY; www.stjamescourtartshow.com)
• St. Louis Art Fair (Clayton, MO; www.culturalfestivals.com)

The following are other notable arts fairs and festivals (sources: Art Fair Calendar, Chicago Tribune, Huffington Post, and various local media):
• Arts, Beats & Eats (Royal Oak, MI; www.artsbeatseats.com)
• Atlanta Arts Festival (Atlanta, GA; www.atlantaartsfestival.com)
• Bayou City Art Festival (Houston, TX; www.bayoucityartfestival.com)
• Bellevue Festival of The Arts (Bellevue, WA; www.bellevuefest.org)
• Brookside Art Annual (Kansas City, MO; www.brooksidekc.org/bba/art-annual)
• Central Pennsylvania Festival of the Arts (State College, PA; www.arts-festival.com)
• Cherry Creek Arts Festival (Denver, CO; www.cherryarts.org)
• Coconut Grove Arts Festival (Coconut Grove, FL; www.cgaf.com)
• Columbus Arts Festival (Columbus, OH; www.columbusartsfestival.org)
• Kentuck Festival of the Arts (Northport, AL; http://kentuck.org/festival.html)
• Krasl Art Fair (St. Joseph, MI; www.krasl.org)
• Lakefront Festival of Art (Milwaukee, WI; http://lfoa.mam.org/)
• Long’s Park Art & Craft Festival (Lancaster, PA; http://longspark.org/art-craft-festival)
• Main Street, Fort Worth Arts Festival (Fort Worth, TX; www.mainstreetartsfest.org)
• National Black Arts Festival (Atlanta, GA; www.nbaf.org)
• Northern Virginia Fine Arts Festival (Reston, VA; http://northernvirginiafineartsfestival.org)
• Oklahoma City Festival of the Arts (Oklahoma City, OK; www.artsincouncilokc.com/festival-of-the-arts)
• Park City Kimball Arts Festival (Park City, UT; www.parkcitykimballartsfestival.org)
• Plaza Art Fair (Kansas City, MO; www.countryclubplaza.com/Events/Plaza-Art-Fair)
• Sausalito Art Festival (Sausalito, CA; www.sausalitoartfestival.org/)
• Annual Ann Arbor Summer Art Fair (Ann Arbor, MI; www.theguild.org/fairs/ann-arbor-art-fair)
• Uptown Art Fair (Minneapolis, MN; http://uptownartfair.com/)
• Winter Park Sidewalk Arts Festival (Winter Park, FL; www.wpsaf.org)

22.4 Film Festivals

Film festivals provide an opportunity for filmmakers, producers, screenwriters, and film score composers – from students to professionals – to showcase their work. Held annually since 1952, the Columbus International Film + Video Festival (Columbus, OH; www.columbusfilmcouncil.org) is the oldest film festival in the U.S. The Seattle International Film Festival (www.seattlefilm.org) is the largest film festival in the United States, with attendance of about 160,000. With attendance reaching 290,000, the Toronto International Film Festival (www.tiff.net) is the largest in North America.

The following links to a list of prominent annual film festivals in the United States: www.rkma.com/leisure/FilmFestivals.pdf.

22.5 Market Resources

American Bus Association, 111 K Street NE, 9th Floor, Washington, DC 20002. (202) 842-1645. (www.buses.org)

Carnival Warehouse, P.O. Box 6682, Elgin, IL 60121. (www.carnivalwarehouse.com)

International Association of Fairs and Expositions, 3043 E. Cairo, Springfield, MO 65802. (800) 516-0313. (www.fairsandexpos.com)

International Festivals & Events Association, 2603 W. Eastover Terrace, Boise, ID 83706. (208) 433-0950. (www.ifea.com)
23

FISHING

23.1 RBFF Report

According to 2014 Special Report on Fishing, published by the Recreational Boating & Fishing Foundation (RBFF, www.takemefishing.org), 46 million Americans, or 15.8% of the U.S. population, participated in fishing in 2013. Collectively, fishing participants made 904 million annual outings, or an average of 19.7 outings each.

For the first time since 2010, the sport of fishing lost participants. While 8.7 million new or former fishing participants joined the sport, 9.9 million left.

While fishing is a historically male-dominated sport, first-time participation skewed heavily female in 2013. Females now represent 34.4% of fishing participants.

The geographic distribution of those who fish is as follows:

- South Atlantic: 19.9%
- East North Central: 17.0%
- Pacific: 12.3%
- Middle Atlantic: 11.8%
- West South Central: 11.5%
- West North Central: 9.2%
- East South Central: 7.5%
- Mountain: 6.5%
- New England: 4.5%

23.2 SFIA Report

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (SFIA, www.sfia.org), fishing participation (age six and older) in 2013 was as follows (five-year change in participation in parenthesis):

**Freshwater Fishing**
- 1-to-7 times: 20.1 million (1%)
- 8 or more: 17.7 million (-5%)

**Saltwater Fishing**
- 1-to-7 times: 7.1 million (-3%)
- 8-to-14 times: 4.7 million (-4%)
Fly Fishing
• 1-to-7 times: 3.8 million (5%)
• 8-to-14 times: 2.1 million (-6%)

23.3 FWS Survey
The U.S. Fish and Wildlife Service (FWS, www.fws.gov) conducts the National Survey of Fishing, Hunting, and Wildlife Related Recreation every five years. The most recent report was published in September 2012. According to the survey, 33.1 million people age 16 years and older fished in 2011. Anglers spent more than $41.8 billion in 2011. Of those who fished, 21% traveled to other states to do so.

According to the FWS survey, 33.3 million anglers spent an average of 17 days fishing. Freshwater fishing was the most popular type of fishing, with over 27.5 million anglers devoted to the sport. Great Lakes and saltwater fishing were also popular, with 1.6 million and 8.9 million anglers, respectively. Spending for these activities was as follows:
• Freshwater fishing: $23.8 billion
• Saltwater fishing: $10.3 billion

23.4 State-by-State Assessment
According to the FWS, the following is the total number of sportspersons (ages 16 years and older) who fish (percent of population in parenthesis):

<table>
<thead>
<tr>
<th>State</th>
<th>Fished Only</th>
<th>Hunted and Fished</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>252,000 (7%)</td>
<td>264,000 (7%)</td>
</tr>
<tr>
<td>Alaska</td>
<td>129,000 (25%)</td>
<td>82,000 (16%)</td>
</tr>
<tr>
<td>Arizona</td>
<td>462,000 (9%)</td>
<td>124,000 (2%)</td>
</tr>
<tr>
<td>Arkansas</td>
<td>252,000 (11%)</td>
<td>214,000 (10%)</td>
</tr>
<tr>
<td>California</td>
<td>1.43 million (5%)</td>
<td>269,000 (1%)</td>
</tr>
<tr>
<td>Colorado</td>
<td>567,000 (14%)</td>
<td>99,000 (3%)</td>
</tr>
<tr>
<td>Connecticut</td>
<td>265,000 (10%)</td>
<td>76,000 (3%)</td>
</tr>
<tr>
<td>Delaware</td>
<td>78,000 (11%)</td>
<td>14,000 (2%)</td>
</tr>
<tr>
<td>Florida</td>
<td>1.73 million (12%)</td>
<td>252,000 (2%)</td>
</tr>
<tr>
<td>Georgia</td>
<td>672,000 (9%)</td>
<td>171,000 (2%)</td>
</tr>
<tr>
<td>Hawaii</td>
<td>85,000 (9%)</td>
<td>21,000 (2%)</td>
</tr>
<tr>
<td>Idaho</td>
<td>169,000 (14%)</td>
<td>119,000 (10%)</td>
</tr>
<tr>
<td>Illinois</td>
<td>976,000 (10%)</td>
<td>260,000 (3%)</td>
</tr>
<tr>
<td>Indiana</td>
<td>465,000 (9%)</td>
<td>322,000 (6%)</td>
</tr>
<tr>
<td>Iowa</td>
<td>369,000 (16%)</td>
<td>152,000 (6%)</td>
</tr>
<tr>
<td>Kansas</td>
<td>275,000 (13%)</td>
<td>159,000 (7%)</td>
</tr>
<tr>
<td>Kentucky</td>
<td>327,000 (10%)</td>
<td>165,000 (5%)</td>
</tr>
<tr>
<td>Louisiana</td>
<td>511,000 (15%)</td>
<td>222,000 (6%)</td>
</tr>
<tr>
<td>Maine</td>
<td>92,000 (9%)</td>
<td>104,000 (10%)</td>
</tr>
<tr>
<td>-------------------</td>
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<td>---------------------</td>
</tr>
<tr>
<td>Maryland</td>
<td>337,000 (8%)</td>
<td>72,000 (2%)</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>398,000 (7%)</td>
<td>59,000 (1%)</td>
</tr>
<tr>
<td>Michigan</td>
<td>1.13 million (14%)</td>
<td>337,000 (4%)</td>
</tr>
<tr>
<td>Minnesota</td>
<td>925,000 (22%)</td>
<td>403,000 (10%)</td>
</tr>
<tr>
<td>Mississippi</td>
<td>263,000 (12%)</td>
<td>340,000 (15%)</td>
</tr>
<tr>
<td>Missouri</td>
<td>507,000 (11%)</td>
<td>363,000 (8%)</td>
</tr>
<tr>
<td>Montana</td>
<td>114,000 (15%)</td>
<td>78,000 (10%)</td>
</tr>
<tr>
<td>Nebraska</td>
<td>143,000 (10%)</td>
<td>54,000 (4%)</td>
</tr>
<tr>
<td>Nevada</td>
<td>122,000 (6%)</td>
<td>34,000 (2%)</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>125,000 (12%)</td>
<td>39,000 (4%)</td>
</tr>
<tr>
<td>New Jersey</td>
<td>593,000 (9%)</td>
<td>86,000 (1%)</td>
</tr>
<tr>
<td>New Mexico</td>
<td>185,000 (12%)</td>
<td>47,000 (3%)</td>
</tr>
<tr>
<td>New York</td>
<td>1.24 million (8%)</td>
<td>567,000 (4%)</td>
</tr>
<tr>
<td>North Carolina</td>
<td>1.08 million (15%)</td>
<td>230,000 (3%)</td>
</tr>
<tr>
<td>North Dakota</td>
<td>43,000 (8%)</td>
<td>34,000 (7%)</td>
</tr>
<tr>
<td>Ohio</td>
<td>1.08 million (12%)</td>
<td>360,000 (4%)</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>551,000 (19%)</td>
<td>193,000 (7%)</td>
</tr>
<tr>
<td>Oregon</td>
<td>263,000 (9%)</td>
<td>123,000 (4%)</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>574,000 (6%)</td>
<td>434,000 (4%)</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>77,000 (9%)</td>
<td>16,000 (2%)</td>
</tr>
<tr>
<td>South Carolina</td>
<td>337,000 (11%)</td>
<td>196,000 (6%)</td>
</tr>
<tr>
<td>South Dakota</td>
<td>58,000 (9%)</td>
<td>106,000 (17%)</td>
</tr>
<tr>
<td>Tennessee</td>
<td>637,000 (13%)</td>
<td>196,000 (4%)</td>
</tr>
<tr>
<td>Texas</td>
<td>1.63 million (9%)</td>
<td>724,000 (4%)</td>
</tr>
<tr>
<td>Utah</td>
<td>245,000 (12%)</td>
<td>106,000 (5%)</td>
</tr>
<tr>
<td>Vermont</td>
<td>64,000 (12%)</td>
<td>41,000 (8%)</td>
</tr>
<tr>
<td>Virginia</td>
<td>488,000 (8%)</td>
<td>219,000 (4%)</td>
</tr>
<tr>
<td>Washington</td>
<td>749,000 (14%)</td>
<td>165,000 (3%)</td>
</tr>
<tr>
<td>West Virginia</td>
<td>111,000 (8%)</td>
<td>128,000 (9%)</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>434,000 (10%)</td>
<td>504,000 (11%)</td>
</tr>
<tr>
<td>Wyoming</td>
<td>69,000 (16%)</td>
<td>46,000 (11%)</td>
</tr>
</tbody>
</table>

### 23.5 Bass Fishing

Bass are the most pervasive sport fish in the U.S., indigenous to the waters of every state except Alaska. And bass prove to be a worthy opponent even for pro anglers. In the cult-like devotion it inspires, bass fishing is similar to NASCAR. In fact, many bass fishermen are NASCAR fans.

According to *Sports Illustrated*, 30 million Americans fish for bass every year.

B.A.S.S. (the Bass Anglers Sportsman Society, [www.bassmaster.com](http://www.bassmaster.com)), primarily a conservation and advocacy group, has about 600,000 members. Founded by Ray Scott in 1967, B.A.S.S. manages more than 30 national fishing tournaments annually, which are televised on ESPN.
The Ozarks region (Missouri) has become a mecca for bass fishermen. According to USA Today, some anglers drive up to 14 hours to fish in the area. According to Derrick Crandall, director of the American Recreation Coalition (www.funoutdoors.com), other popular areas for bass fishing include:

- Lake Lanier, GA
- Walt Disney World (Orlando, FL)
- Kentucky Lake, KY
- Lake Mead, NV
- Shasta Lake, CA

According to B.A.S.S., the average amateur angler spends about $200 a month on equipment, which adds up to a $40 billion industry. That is more than is spent on tennis or biking. But fishing is a private activity that does not generate the excitement other sports do. Partly as a result, participation is not growing.

### 23.6 Market Resources

American Sportfishing Association, 1001 North Fairfax Street, Suite 501, Alexandria, VA 22314. (703) 519-9691. (www.asafishing.org)

Recreational Boating & Fishing Foundation, 500 Montgomery Street, Suite 300, Alexandria, VA 22314. (703) 519-0013. (http://takemefishing.org)

Sports & Fitness Industry Association, 8505 Fenton Street, Suite 211, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)

24

FITNESS & HEALTH

24.1 Fitness Activities

According to The American Time Use Survey, published by the Bureau of Labor Statistics (www.bls.gov) of the U.S. Department of Labor, Americans on average spend 18 minutes per day participating in sports, exercise, or recreation. Among those who participate in these activities at all, the average is 1.7 hours daily, representing about one-third of leisure activity time.

On average, teens are active 40 minutes a day; people age 35 and above spend 15 minutes or less being active. The survey suggests that Americans tend to do less physical activity as they get older.

24.2 Fitness and Health Clubs

According to the International Health, Racquet & Sportsclub Association (IHRSA, www.ihrsa.org), 50.2 million people in the U.S. are members of a fitness and health club. Membership increased 71% between 1997 and 2007, peaking in 2006, when 42.7 million people were members of U.S. clubs. Membership began declining in 2008, as the economy forced many consumers to cut back. Membership increased more than 10% between 2011 and 2013. In 2013, 6.5 million Americans used personal trainers, according to the IHRSA.

Surveys by International Demographics (www.themediaaudit.com) found that 28.7% of adults work out at least monthly at a health club. The following are the metropolitan areas with the highest percentage of adults who do so:

- Boston, MA: 34.1%
- San Jose, CA: 33.3%
- Seattle, WA: 32.9%
- San Francisco, CA: 32.8%
- Washington, DC: 32.4%
- Denver, CO: 32.3%
- New York, NY: 32.0%
- Reno, NV: 31.7%
- Columbia-Jefferson City, MO: 31.1%
- Chicago, IL: 31.0%
A recent trend has been the rise in popularity of cross-training gyms. According to the Sports and Fitness Industries Association (SFIA, www.sfia.org), 6.9 million people practiced boot-camp-style cross-training in 2013; 2.4 million were core participants, participating 50 or more times.

Data on adults in 93 metropolitan areas who work out at a health club is available online at www.themediaaudit.com/press/local-releases.

According to Fitness Centers Industry Profile, an August 2014 report by First Research (www.firstresearch.com), the U.S. fitness centers industry includes about 28,000 companies and nonprofits in the U.S. that operate about 32,000 fitness and recreation centers with combined annual revenue of around $25 billion.

Gym, Health & Fitness Clubs in the U.S., a June 2014 report by IBISWorld (www.ibisworld.com), assessed that there are 29,894 fitness & health clubs in the United States; combined revenue is $27 billion.

The industry is highly fragmented; only a few dozen companies own more than 10 centers. The 50 largest companies, which include 24 Hour Fitness, Bally’s Total Fitness, Curves, Gold’s Gym, LA Fitness, Life Time Fitness, Spectrum Club, and Town Sports International (operator of the Sports Club brand) hold only about 30% of the market. Not-for-profit organizations, such as the YMCA, operate more than 5,000 of the 32,000 clubs.

24.3 Fitness At Home

According to the SFIA, 25.5 million people exercised using home gym equipment in 2013, a figure that has remained relatively constant for over five years; 14.8 million did so 50 or more times.

The most popular item of conditioning equipment is the treadmill. In 2013, 48.2 million people used a treadmill; 26.4 million people did so 50 or more times.

24.4 Market Resources

Fitness Centers Industry Profile, First Research, August 2014. (www.firstresearch.com/Industry-Research/Fitness-Centers.html)

International Health, Racquet & Sportsclub Association (IHRSA), 263 Summer Street, Boston, MA 02210. (800) 228-4772. (www.ihrsa.org)

Profiles Of Success, IHRSA, November 2013. (www.ihrsa.org/profiles)

Sports & Fitness Industry Association, 8505 Fenton Street, Suite 211, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)

25.1 Board Games

The NPD Group (www.npd.com) estimates annual spending in the U.S. for board games at more than $800 million. Board games appeal to a broad demographic. They have traditionally been popular with families with children, but adults without children are becoming attracted to games. Board games typically are most popular during tough economic times when many people are looking for a way to socialize without going out. After all, Monopoly was launched in 1935, during the Great Depression.

“When the economy is bad and people are feeling financially pinched, board games are very attractive. You can play them over and over again.”

Cliff Annicelli, Editor-in-Chief

Playthings Magazine

There are many different types and styles of board games ranging from, at the most basic level, those that have no inherent theme, such as Checkers, to more-complicated games with definite subjects, or even narratives, such as Cluedo. Some classic board games include backgammon, checkers, chess, Chinese checkers, Dungeons and Dragons, Monopoly, Risk, Scrabble, and Trivial Pursuit.

Board games are categorized as follows:

• Children’s games
• Economics and strategy games
• European race games
• Games of physical skill
• Multiplayer elimination games
• Multiplayer games without elimination
• Two-player abstract strategy games
Within these categories there are over 300 board games.

25.2 Chess

An estimated 605 million people worldwide know the rules of chess; 7.5 million are members of national chess federations, which exist in 160 countries worldwide. This makes chess one of the most popular games worldwide.

Chess is one of the most popular games of skill in the U.S., played by millions of people at home, in chess clubs, online, by correspondence, and in tournaments. The United States Chess Federation (USCF, www.uschess.org), the governing body for the sport in the U.S., has over 80,000 members and more than 2,000 affiliated chess clubs.

Chess is increasingly being used in schools as a learning tool. In 2003, America’s Foundation for Chess (www.af4c.org) launched FirstMove, a program that teaches second- and third-graders how to play chess. Over 50,000 students in 27 states are active in FirstMove.

“More educators are seeing the impact on their students. Though chess isn’t required in most schools, programs have been launched in inner-city schools, private schools, and even home schools.”

USA Today

St. Louis has developed into the epicenter for chess in the United States.

“The St. Louis region is now home to the U.S. Chess Championship, the World Chess Hall of Fame, [three-time U.S. champion] Hikaru Nakamura, and its top collegiate chess team at Webster University. It’s a mecca for aspiring players because of the chance to compete against the best in the U.S.”

USA Today
In 2012, Agon (www.agonlimited.com) obtained rights from the World Chess Federation (www.fide.com) to organize – for the next 11 years – all events in the World Championship cycle: Grand Prixs, World Cups, Candidates Tournaments, and World Championship matches.

“There are more people in America who play chess than tennis and golf combined.”

Andrew Paulson, Chairman
Agon

25.3 Contact Bridge

According to the American Contact Bridge League (ACBL, www.acbl.org), 25 million Americans (11.6% of the adult population) play bridge. An additional 21 million are at least familiar with the game.

Most bridge players also play other card games. The following are the percentages of bridge players who typically play other games at least once every two-to-three weeks:

- Solitaire: 62.2%
- Spades: 30.6%
- Poker: 30.4%
- Euchre: 27.8%
- Cribbage: 21.6%
- Gin rummy: 16.3%

It is their love of bridge that is said to bind the two wealthiest Americans: Bill Gates and Warren Buffett. So enamored of the game are they, the two billionaires put up $1 million to start a program to teach contact bridge in junior high schools.

The mean age of bridge players is 53.9. Based on the Nationwide Bridge Survey, conducted by Equation Research (www.equationresearch.com), the following are demographics of bridge players:

**Gender**

- Female: 46.1%
- Male: 53.9%
Ethnicity
- Caucasian: 71.5%
- African-American: 15.6%
- Asian-American: 11.1%

Education
- College (four-year) degree: 20.3%
- Graduate degree: 23.1%
- Total college: 53.1%

Annual income
- More than $50,000: 27.0%
- More than $75,000: 47.1%
- Mean: $61,500

North American Bridge Championships, sponsored by the ACBL, are held three times a year; events draw more than 5,000 participants.

25.4 Poker
According to Peter D. Hart Research Associates (www.hartresearch.com), approximately 15% of adults play poker.

The percentages of people, by gender and age demographic, that play poker are as follows:

Gender
- Male: 25%
- Female: 13%

Age
- 21-to-39: 35%
- 40-to-49: 18%
- 50-to-64: 15%
- 65 and older: 11%

Poker is a highly social activity. When asked in a survey by Luntz, Maslansky Strategic Research (www.luntz.com) why they play poker, players responded as follows:
- Spending time with family and friends: 51%
- The skill and strategy involved: 20%
- The chance to win money: 12%
- It's a popular game and lots of people are playing: 7%
- Other reasons: 10%
Poker enthusiasts play the game in a variety of settings, according to survey responses. More than three-quarters (78%) of poker players reported playing with friends and family in the past year, 27% have played in a casino or tournament, 10% reported playing over the Internet for money, and 29% have played online just for fun. Others surveys have reported similar participation. A survey by SRBI Public Affairs (www.srbi.com) found that 47% of Americans have played poker in some form; 11% have played poker online.

25.5 Market Resources
America’s Foundation for Chess, 11120 NE 33rd Place, Suite 105, Bellevue, WA 98004. (866) 973-2342. (www.af4c.org)

American Contact Bridge League, 6575 Windchase Boulevard, Horn Lake, MS 38637. (662) 253-3100. (www.acbl.org)

United States Chess Federation, 137 O’Brien Drive, Crossville, TN 38555. (931) 787-1234. (www.uschess.org)
26

GARDENING

26.1 Market Assessment
According to the National Gardening Association (NGA, www.garden.org), 70% of all U.S. households, or an estimated 80 million households, participate in one or more types of do-it-yourself indoor/outdoor lawn and garden activities. Annual sales for all types of do-it-yourself lawn and garden activities are $30 billion.

According to the NGA, lawn and garden participation is highest among married households; people 35-to-44 years of age, or 55 years and older; college-educated households; households with annual incomes of $75,000 and over; two-person households; Midwestern households; and households with children at home or retirees.

The nationwide average amount spent on all lawn and garden activities in 2013 was $363. Nearly four times as many households participate in do-it-yourself lawn and garden activities as hire someone to care for their lawns and gardens for them.

26.2 Food Gardening
According to an April 2014 report by the National Gardening Association, 42 million U.S. households grew their own food in home and community gardens in 2013, a 17% increase from 36 million households that did so in 2008. In 2013, $3.5 billion was spent on food gardening in 2013, a 40% increase from $2.5 billion in 2008.

The following are additional findings from the NGA report:
• In 2013, 76% of all households with a food garden grew vegetables, a 19% increase since 2008.
• Young people, particularly millennials (ages 18-to-34), are the fastest growing population segment of food gardeners. In 2008, there were 8 million millennial food gardeners. That figure rose to 13 million in 2013, an increase of 63%. Millennials also nearly doubled their spending on food gardening, from $632 million in 2008 to $1.2 billion in 2013.
• Participation in food gardening among households with children increased 25%, to 15 million in 2013 from 12 million in 2008.
• There was a 29% increase in food gardening by people living in urban areas, up from 7 million in 2008 to 9 million in 2013. Two million more households also reported participating in community gardening in 2013 than in 2008, a 200% increase in five years.
• Households with incomes under $35,000 participating in food gardening grew to 11 million in 2013, an increase of 38% from those that did so in 2008.
26.3 Gardening Surveys

International Demographics (www.themediaaudit.com) regularly surveys U.S. households on various topics, including gardening. Surveys in 79 metropolitan areas found the percentages of adults who work in their lawn or garden at least once a year are as follows:

- Akron, OH: 74.2%
- Albany-Schenectady-Troy, NY: 70.9%
- Albuquerque, NM: 75.7%
- Allentown-Bethlehem, PA: 73.2%
- Ann Arbor, MI: 68.9%
- Atlanta, GA: 66.7%
- Austin, TX: 68.2%
- Baltimore, MD: 67.6%
- Birmingham, AL: 72.2%
- Boise, ID: 86.0%
- Boston, MA: 66.4%
- Buffalo, NY: 68.0%
- Charleston, SC: 63.0%
- Charlotte, NC: 65.4%
- Chicago, IL: 58.6%
- Cincinnati, OH: 73.1%
- Cleveland, OH: 69.3%
- Colorado Springs, CO: 67.5%
- Columbia, SC: 70.6%
- Columbia-Jefferson City, MO: 73.6%
- Columbus, OH: 70.9%
- Dallas-Ft. Worth, TX: 64.1%
- Dayton, OH: 70.3%
- Denver, CO: 68.8%
- Detroit, MI: 76.5%
- Eugene-Springfield, OR: 84.2%
- Ft. Myers-Naples, FL: 63.1%
- Grand Rapids, MI: 81.7%
- Greensboro, NC: 69.7%
- Greenville-Spartanburg, SC: 67.4%
- Houston, TX: 58.9%
- Indianapolis, IN: 75.2%
- Jacksonville, FL: 65.5%
- Kansas City, MO: 70.7%
- Las Vegas, NV: 53.3%
- Lexington, KY: 73.2%
- Little Rock, AR: 65.5%
<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles, CA</td>
<td>46.7%</td>
</tr>
<tr>
<td>Louisville, KY</td>
<td>66.7%</td>
</tr>
<tr>
<td>Madison, WI</td>
<td>75.9%</td>
</tr>
<tr>
<td>Melbourne-Titusville-Cocoa, FL</td>
<td>70.7%</td>
</tr>
<tr>
<td>Memphis, TN</td>
<td>67.7%</td>
</tr>
<tr>
<td>Miami-Ft. Lauderdale, FL</td>
<td>47.7%</td>
</tr>
<tr>
<td>Milwaukee-Racine, WI</td>
<td>61.1%</td>
</tr>
<tr>
<td>Minneapolis-Saint Paul, MN</td>
<td>75.6%</td>
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<tr>
<td>Nashville, TN</td>
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<tr>
<td>New Orleans, LA</td>
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</tr>
<tr>
<td>New York, NY</td>
<td>48.4%</td>
</tr>
<tr>
<td>Ocala, FL</td>
<td>74.1%</td>
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<tr>
<td>Oklahoma City, OK</td>
<td>70.6%</td>
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<tr>
<td>Omaha-Council Bluffs, NE</td>
<td>74.5%</td>
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<tr>
<td>Orange County, CA</td>
<td>55.5%</td>
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<tr>
<td>Orlando, FL</td>
<td>62.2%</td>
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<tr>
<td>Peoria, IL</td>
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<tr>
<td>Philadelphia, PA</td>
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<td>Phoenix, AZ</td>
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<tr>
<td>Pittsburgh, PA</td>
<td>59.6%</td>
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<tr>
<td>Portland, OR</td>
<td>74.7%</td>
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<td>Raleigh-Durham, NC</td>
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<tr>
<td>Reno, NV</td>
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<tr>
<td>Riverside-San Bernardino, CA</td>
<td>66.4%</td>
</tr>
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<td>Rochester, NY</td>
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<tr>
<td>Sacramento, CA</td>
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<td>Salt Lake City, UT</td>
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<td>San Antonio, TX</td>
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<td>San Francisco, CA</td>
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<tr>
<td>San Jose, CA</td>
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<tr>
<td>Seattle-Tacoma, WA</td>
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</tr>
<tr>
<td>Southern New Hampshire</td>
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<tr>
<td>Spokane, WA</td>
<td>79.5%</td>
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<tr>
<td>St. Louis, MO</td>
<td>69.1%</td>
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<tr>
<td>Syracuse, NY</td>
<td>72.7%</td>
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<tr>
<td>Tampa-St. Petersburg, FL</td>
<td>64.0%</td>
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<tr>
<td>Toledo, OH</td>
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<tr>
<td>Tucson, AZ</td>
<td>58.7%</td>
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<tr>
<td>Tulsa, OK</td>
<td>76.7%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>57.7%</td>
</tr>
<tr>
<td>West Palm Beach, FL</td>
<td>53.1%</td>
</tr>
</tbody>
</table>
An assessment by International Demographics ranked metropolitan areas by per capita spending on gardening as follows:

- Ocala, FL: $3,757
- Southern New Hampshire: $3,405
- Little Rock, AR: $3,387
- West Palm Beach, FL: $2,502
- Rochester, NY: $2,458
- Akron, OH: $2,443
- Boise, ID: $2,129
- Riverside-San Bernardino, CA: $1,968
- Madison, WI: $1,827
- Albuquerque, NM: $1,822

### 26.4 Community Gardens

Community gardens, where neighbors share space in a common garden area, are growing in popularity. According to the American Community Garden Association (www.communitygarden.org), there are about 20,000 community gardens in the United States.

The National Gardening Association estimated that two million households were involved in community gardening in 2013, a 200% increase from 2008.

In inter-city neighborhoods, community gardens provide an opportunity for residents of high-rise developments to engage in gardening. In suburbs and rural areas, residents enjoy community gardens for social interaction and efficiency of sharing gardening supplies and resources.

_____________________________________________________

“Community gardening improves people’s quality of life by providing a catalyst for neighborhood and community development, stimulating social interaction, encouraging self-reliance, beautifying neighborhoods, producing nutritious food, reducing family food budgets, conserving resources and creating opportunities for recreation, exercise, therapy and education.”

American Community Garden Association

_____________________________________________________


• 140 •
The popularity of community gardens has grown in the past few years, in part because of the support of First Lady Michelle Obama, who has planted a vegetable garden at the White House.

26.5 Botanical Gardens

The tremendous interest in gardening, one of America’s favorite pastimes, is a primary market driver for attendance at public gardens.


Almost all major urban areas in the U.S. have a botanical garden or arboretum. They attract a wide mix of patrons, from those seeking a natural escape to self-appointed horticulturists wanting to learn more about the world of plants. What differentiates a botanical garden or arboretum from a regular park or garden is the placards that tag each species in the collection.

America’s most popular gardens include the following:

- ABQ BioPark Botanic Garden (Albuquerque, NM; www.cabq.gov/biopark/garden)
- Anna Scripps Whitcomb Conservatory (Detroit, MI; www.belleisleconservancy.org)
- Arizona-Sonora Desert Museum (Tucson, AZ; www.desertmuseum.org)
- Atlanta Botanical Garden (Atlanta, GA; www.atlantabotanicalgarden.org)
- Betty Ford Alpine Gardens (Vail, CO; www.bettyfordalpinegardens.org)
- Brookgreen Gardens (Murrells Inlet, SC; www.brookgreen.org)
- Brooklyn Botanic Garden (Brooklyn, NY; www.bbg.org)
- Callaway Gardens (Pine Mountain, GA; www.callawaygardens.com)
- Chicago Botanic Garden (Glencoe, IL; www.chicagobotanic.org)
- Descanso Gardens (LaCanada Flintridge, CA; www.descansogardens.org)
- Denver Botanic Gardens (Denver, CO; www.botanicgardens.org)
- Desert Botanical Garden (Phoenix, AZ; www.dbg.org)
- Fairchild Tropical Botanic Garden (Coral Gables, FL; www.fairchildgarden.org)
- Fort Worth Botanic Garden (Fort Worth, TX; www.fwbg.org)
- Franklin Park Conservatory (Columbus, OH; www.fpconservatory.org)
- Lady Bird Johnson Wildflower Center (Austin, TX; www.wildflower.org)
- Lewis Ginter Botanical Garden (Richmond, VA; www.lewisginter.org)
- Longwood Gardens (Kennett Square, PA; www.longwoodgardens.org)
- Minnesota Landscape Arboretum (Chanhassen, MN; www.arboretum.umn.edu)
- Missouri Botanical Garden (St. Louis, MO; www.mobot.org)
- Oldfields - Lilly House & Gardens (Indianapolis, IN; www.imamuseum.org/visit/oldfields-lilly-house-gardens)
- Phipps Conservatory & Botanical Garden (Pittsburgh, PA; www.phipps.conservatory.org)
- San Francisco Botanical Garden at Strybing Arboretum (San Francisco, CA; www.sfbotanicalgarden.org)
- The Arnold Arboretum of Harvard University (Boston, MA;
www.arboretum.harvard.edu
- The Bloedel Reserve (Bainbridge Island, WA; www.bloedelreserve.org)
- The Huntington Botanical Gardens (San Marino, CA; www.huntington.org)
- The Living Desert Zoo & Gardens (Carlsbad, NM; www.livingdesert.org)
- The New York Botanical Garden (New York, NY; www.nybg.org)
- The United States National Arboretum (Washington, DC; www.usna.usda.gov)
- United States Botanic Garden (Washington, DC; www.usbg.gov)

26.6 Market Resources
American Community Garden Association, 1777 East Broad Street, Columbus, OH 43203. (877) 275-2242. (www.communitygarden.org)

American Public Gardens Association, 351 Longwood Road, Kennett Square, PA 19348. (610) 708-3010. (www.publicgardens.org)

National Gardening Association, 237 Commerce Street, Suite 101, Williston, VT 05495. (802) 863-5251. (www.garden.org)

27

**GENEALOGY**

27.1 Market Assessment

Genealogy is second in popularity only to gardening among American hobbies, according to *The New York Times*.

According to IBISWorld (www.ibisworld.com), there are 10,088 ancestry research services businesses in the United States; combined revenue is $1 billion.

27.2 Genealogy Research Websites

With the advent of the Internet, the number of resources available to genealogists has vastly increased. Some of the more popular genealogical websites that let users research ancestors and build family profiles are Ancestry.com, MyFamily.com, MyHeritage.com, OneGreatFamily.com, and Zooof.com.

According to *The Wall Street Journal*, The Generations Networks – founded as MyFamily.com, Inc. nearly a decade ago and now operating eight sites including Ancestry.com – has built its $200 million a year businesses primarily by selling subscriptions to passionate family historians for access to archives that track family lineage. As of December 2013, Ancestry.com had 2.14 million paying subscribers. About 4% of subscribers cancel every month, however – meaning roughly half the customer base turns over every year – because many stay active only while engaged in a research project.

Geni.com, acquired by MyHeritage in 2012, offers a genealogy model based on connecting living relatives. The site is part genealogy, part six degrees of separation: Instead of paying a fee to research family records buried in archives, users build their own family trees using the knowledge of living relatives.

Rather than user fees, Geni sells advertising and also generates revenue by creating premium accounts and selling products such as posters or coffee-table books of family trees. Without any traditional marketing, the site had more than 100,000 users in the first month following its January 2007 launch.

Geni.com incorporates some of the elements of popular social-networking and user-generated content sites such as Wikipedia and MySpace. Geni has over 100 million profiles and more than 6 million users.
27.3 Genetic Genealogy

Sequencing of the human genome opened the door to DNA testing as a tool for genealogical research. These tests characterize identifying genetic markers passed through maternal and/or paternal lineage. While the tests do not tell people precisely how they are related, those who match at multiple markers are almost certain to share a recent common ancestor. Close to a million people have taken a DNA genealogy test, according to estimates from companies that provide them.

Some basic tests are sold for about $99, a small fraction of what they might have cost a decade ago. Still, when dozens of relatives are tested, costs can add up for amateur genealogists.

27.4 Market Resources

American Society of Genealogists, 5337 Del Roy Drive, Dallas, TX 75229. (www.fasg.org)

Ancestry Research Services in the U.S., IBISWorld, May 2014. (www.ibisworld.com/industry/ancestry-research-services.html)
28.1 Participation and Spending

There are 105 million self-professed golf fans and 36 million people have played. According to the 2014 Golf Participation Study, by the National Golf Foundation (NGF, www.ngf.org), there were 27.1 million golfers in the U.S. ages 6 and up in 2013. The 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), assesses the number of people that played at least one round of golf as follows:

- 2008: 28.6 million
- 2009: 27.1 million
- 2010: 26.1 million
- 2011: 25.7 million
- 2012: 25.3 million
- 2013: 24.7 million

According to Golf Datatech (www.golfdatatech.com), there were 462 million rounds of golf played in 2013.

Changes in golf participation rates in 2013, by region, were as follows (source: Golf 20/20):

<table>
<thead>
<tr>
<th>Percent of Rounds From Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific:</td>
</tr>
<tr>
<td>West North Central:</td>
</tr>
<tr>
<td>New England:</td>
</tr>
<tr>
<td>South Atlantic:</td>
</tr>
<tr>
<td>Mountain:</td>
</tr>
<tr>
<td>Mid Atlantic:</td>
</tr>
<tr>
<td>South Central:</td>
</tr>
<tr>
<td>East North Central:</td>
</tr>
<tr>
<td>Total:</td>
</tr>
</tbody>
</table>

According to NGF, a total of 3.7 million people took up golf in 2013, however, 4.1 million golfers left the game, for a net loss of 400,000 players. The net gain of almost 260,000 women golfers was more than offset by a net loss of nearly 650,000 men. The biggest losses were in the 18-to-34 age group.

Pellucid (www.pellucid.com) reports the drop in participation even higher,
estimating that the sport lost 1.1 million players in 2013. The number of U.S. golfers has dropped 24% from its peak in 2002 to about 23 million players in 2013, according to Pellucid.

“Given the sport’s costs and inherent difficulty – while a video game on a smartphone can be mastered in as little as a few hours, golf can require years of practice to play well – the slide is unlikely to end anytime soon.”

*Bloomberg Businessweek, 6/23/14*

Among youth golfers, while boys’ high school golf team participation peaked at 167,781 in 1998-99 and has been in steady decline since, girls’ high school team golf participation had been going up for most of the time, according to data complied by the National Federation of State High School Associations (www.nfhs.org). Over the last five years, however, girls’ participation has plateaued at around 71,000.

The National Golf Foundation estimates that golfers spend $19.7 billion on public and private green fees and dues each year. On equipment (clubs, balls, bags, gloves, shoes) golfers spend $4.7 billion. Golfers spend about $26 billion a year on golf travel, 75% of which goes to the hotel, transportation, and food and beverage industries.

“Golf has a tremendous impact on the U.S. economy. Golf is roughly a $69 billion annual industry in the U.S.”

Ted Bishop, President
PGA of America
*Bloomberg Businessweek, 6/30/14*
28.2 Golf Courses

As of year-end 2013, there were 14,564 golf courses in the United States, according to NGF.

The following are the states with the most facilities:

- Florida
- California
- New York
- Michigan
- Texas

According to the National Golf Foundation, 14 new courses (in 18-hole equivalents) were built in 2014 in the United States, while another 158 closed, for a net loss of 144 courses. This marks the eighth straight year that more courses closed than opened.

A list of award-winning golf resorts is presented at www.rkma.com/GolfResorts.pdf.

28.3 Female Golfers

Women make up just 19% of what the National Golf Foundation defines as core golfers – those playing at least eight rounds of golf a year. The average age of female golfers is 40.7. Core female golfers average 18.0 rounds a year.

Though women remain a relatively small part of the multibillion dollar golf market, the upward trend in female interest has caught the attention of resorts looking for new ways of attracting customers. Gender-specific classes and programs have been designed especially for women to introduce golf as a fun challenge.

28.4 Market Resources

Golf Datatech, 204 South Rose Avenue, Kissimmee, FL 34741. (888) 944-4116. (www.golfdatatech.com)

National Golf Foundation, 1150 South US Highway One, Suite 401, Jupiter, FL 33477. (561) 744-6107. (www.ngf.org)
29

HOLIDAY FESTIVITIES

29.1 Overview

Holidays give people time away from their normal routines for leisure and holiday festivities provide many options. This chapter assesses festivities for 14 holidays, as follows:

• New Year’s: January 1
• Martin Luther King Jr. Day: third Monday of January
• Valentine’s Day: February 14
• Mardi Gras: last day before the fasting season of Lent
• St. Patrick’s Day: March 17
• Easter: first Sunday after Vernal Equinox (April or May)
• Cinco de Mayo: May 5
• Memorial Day: the last Monday of May
• Independence Day: July 4
• Labor Day: the first Monday in September
• Oktoberfest: late September to the first weekend in October
• Halloween: October 31
• Thanksgiving: the fourth Thursday in November
• Christmas: December 25

29.2 New Year’s

Surveys find that approximately one-third of adults go out to celebrate New Year’s Eve; about 66% celebrate at home. Festivities include fireworks; galas at restaurants and hotels are popular.

The best-known New Year’s Eve celebration is the Times Square Ball Drop in New York City. It is attended by at least one million spectators yearly and enjoys a national television audience across New Year’s Eve specials on several of the United States’ major broadcast television networks, along with coverage on several major cable networks. Approximately a billion people worldwide watch the famous ball drop on television and over the Internet.

Many other cities present major New Year’s Eve extravaganzas. These include the following:

Anaheim, CA and Orlando, FL

• New Year’s Eve is traditionally the busiest day of the year at Disneyland and Walt
Disney World Resort. The parks stay open late and the usual nightly fireworks are supplemented by an additional New Year’s Eve-specific show at midnight.

**Atlanta, GA**
- Fireworks, music, and a giant peach ring in the New Year at the annual Peach Drop, held at Underground Atlanta.

**Boston, MA**
- First Night Boston, the oldest and largest alcohol-free alternative New Year’s Eve celebration in the U.S., offers festivities, exhibits, and 250 performances. The event, held at several locations throughout the city, attracts more than one million people. Free outdoor offerings include a parade and ice sculptures.

**Denver, CO**
- Denver’s First Night Colorado is a family-oriented, alcohol-free celebration at the Colorado Convention Center.

**Key West, FL**
- Capitalizing on its quirky culture, Key West is famous for its funky “drop” traditions, which include the conch-shell drop at Sloppy Joe’s, the descent of Sushi the drag queen in her signature 8-foot high-heel red shoe on Duval Street, and the dropping of the pirate wench from a ship’s mast at Schooner’s Wharf.

**Las Vegas, NV**
- New Year’s Eve is the biggest celebration of the year in Las Vegas, as over 300,000 people transform the Las Vegas Strip into a giant street party. The Strip is car-free for the night; there are numerous fireworks displays, laser shows, and live bands. Nightclubs and bars throughout the city host parties.

**Miami, FL**
- MSN and *USA Today* rank Miami as “One of the Top Places in the World to Ring in the New Year.” The fireworks display at Bayfront Park is the largest among several dozen seen across the city’s skyline. The Big Orange make its grand descent in the final minutes of year.

**New Orleans, LA**
- New Orleans erupts with festivities as the Fleur de Lis drops from the roof of Jax Brewery on Jackson Square as the clock strikes midnight. Fireworks displays cascading over the Mississippi River last 15 minutes. Parties in the French Quarter last until the sun comes up.

**San Francisco, CA**
- Every year over 150,000 people watch the fireworks set off over the Bay Bridge from the Embarcadero. The Exotic Erotic New Year’s Eve Ball has guests in costumes;
some wear nothing at all. New Years is also celebrated in San Francisco outside on
the streets of the various neighborhoods that make this city unique.

The Tournament of Roses Parade (www.tournamentofroses.com), better known
as the Rose Parade, is held annually on New Year’s Day and dates to 1890. The
parade is watched in person by up to one million spectators on the parade route in
Pasadena, California, and is broadcast on multiple television networks in the United
States (ABC holds the official contract, but because it is a public parade, other networks
are allowed to produce their own coverage). The parade is also broadcast in more than
200 international territories and countries.

29.3 Martin Luther King Jr. Day
Among the 10 official holiday’s in the United States, Martin Luther King Jr. Day is
the least commercial and has [so far] evolved most true to its intent of being a day with
serious purpose.

Commemorating Dr. King, the highlights of the day in many cities across the U.S.
are the Martin Luther King Jr. Day Parades that attract visitors from all over the world.

In 2014, the selection of the top Martin Luther King Parades by Top Events USA
(www.topeventsusa.com) was as follows:
• Annual Elite News Martin Luther King Jr. Day Parade (Dallas, TX)
• Dr. Martin Luther King Jr. Parade (Baltimore, MD)
• Kingdom Day Parade (Los Angeles, CA)
• Martin Luther King Day Parade and Festival (San Diego, CA)
• Martin Luther King Jr. Grande Parade (Houston, TX)
• Martin Luther King March & Rally (Atlanta, GA)

Lasting over 2 hours and attracting more than 300,000 participants and
spectators, the MLK Grande Parade in Houston is the largest annual parade in the U.S.
celebrating and memorializing the civil rights leader.

In Dallas, the Annual Elite News Martin Luther King Jr. Day Parade attracts more
than 250,000 attendees each year.

29.4 Valentine’s Day
A survey conducted for the National Retail Federation (www.nrf.com) by Prosper
Insights & Analytics (www.goprosper.com) assessed that $17.3 billion was spent for
Valentine’s Day in 2014. Fifty-four percent (54%) of people celebrated with their loved
ones, spending on average $134 for candy, cards, dinner, and more.

According to the National Restaurant Association (www.restaurant.org),
Valentine’s Day is the second most popular day of the year to dine out, trailing only
Mother’s Day. About 30% of adults dine out on Valentine’s Day.

A survey by Zagat (www.zagat.com) found 43% of couples dining out for

• 150 •
Valentine’s Day in 2014.

Out of the seven major gifting holidays, Valentine’s Day is the third most widely gifted holiday, trailing only Christmas (96%) and Mother’s Day (74%). Consumers purchase more than 175 million roses for Valentine’s Day, according to the Society of American Florists (www.safnow.org).

29.5 Mardi Gras

Literally translated, Mardi Gras means “fat Tuesday” and was so called because it represented the last opportunity for merrymaking and excessive indulgence in food and drink before the solemn season of fasting. In the cities of some Roman Catholic countries the custom of holding carnivals for Mardi Gras has continued since the Middle Ages. The carnivals, with spectacular parades, masked balls, mock ceremonials, and street dancing, usually last for a week or more before Mardi Gras itself. New Orleans ranks with Rio de Janeiro, Nice, and Cologne as the most celebrated Mardi Gras worldwide.

New Orleans’ pre-Lent carnival remains the grandest of all in the U.S. No tickets are required for New Orleans’ Mardi Gras, which offers 52 official Mardi Gras parades. The economic impact is high because the celebration lasts 17 days, not just one day. According to Mardi Gras Magazine, Mardi Gras has an economic impact on New Orleans of nearly $1 billion every year. An economic study by the University of New Orleans puts the economic impact of Mardi Gras at $500 million.

In Alabama, Mobile began Mardi Gras in 1710, and traditional celebrations date to 1830. According to the Mobile Carnival Association, $1.5 million is spent for Carnival season costumes, bands for 63 organizations cost $600,000 annually, and decorating for lavish balls costs $350,000.

The following are other prominent Mardi Gras celebrations:

- Annual Mardi Gras Ball (San Francisco, CA)
- Brazilian Carnaval (Long Beach, CA)
- Fasching Carnival (Helen, GA)
- Gaslamp District Mardi Gras (San Diego, CA)
- Mainstrasse Mardi Gras (Covington, KY)
- Mardi Gras Carnivale (Philadelphia, PA)
- Mardi Gras in Biloxi (Biloxi, MS)
- Mardi Gras in Cajun Country (Lafayette, LA)
- Mardi Gras of Imperial Calcasieu (Lake Charles, LA)
- Mardi Gras! Galveston (Galveston, TX)
- Soulard Mardi Gras (St. Louis, MO)
- Universal Studios Mardi Gras (Orlando, FL)

29.6 St. Patrick’s Day

Consumers spend an estimated $2 billion for St. Patrick’s Day, according to the
National Retail Federation, primarily on food, beverages, and decorations. A 2014 survey by Vouchercloud.net, a retail website, assessed spending significantly higher, at $3 billion, of which 35% was spent going to a bar or nightclub and 32% was spent hosting or attending a party. This total does not include spending on hangover remedies, which some revelers may need the following morning.

“The morning after St. Patrick’s Day can sometimes be more expensive than the previous night of revelry, depending on the severity of one’s hangover.”

*Market Watch, 3/21/14*

Euromonitor ([www.euromonitor.com](http://www.euromonitor.com)) estimated spending for hangover remedies in 2013 at $695 million.

About 85 million adults celebrate the holiday. More than 15 million people decorate their home or office in celebration of St. Patrick’s Day. About 32% of those celebrating (27 million people) top off the evening by making a special dinner. And about 13 million people attend a private party.

An estimated 20 million people celebrate the holiday at a restaurant or bar. Many restaurants on St. Patrick’s Day serve green beer and feature traditional Irish dishes. To recreate a true Irish pint of stout, some pubs install a special pour system that improves the creaminess.

More than 100 major parades are held in honor of the Irish holiday throughout the United States. In many cities, the St. Patrick’s Day parade is the largest of the year. The following are some of the major parades and celebrations for St. Patrick’s Day:

**Alexandria, VA**

- The St. Patrick’s Day Parade at Old Town Alexandria is held the second weekend prior to the 17th, making it the earliest major celebration in the country. The parade, with its combination of marching bands, bagpipes, clowns, cars, and floats, lasts two hours.

**Atlanta, GA**

- Atlanta is the 7th largest Irish heritage city in North America, with nearly 25% of the city’s residents claiming Irish descent. The annual St. Patrick’s Day Family Festival, taking place at Underground Atlanta, is highlighted with performances by local Irish dance schools, live music by Celtic bands, and vendors selling everything from t-shirts and shamrock hats to kitschy Irish souvenirs.
Boston, MA
• Boston’s St. Patrick’s Day celebration is the second largest in the country. More than 36 bands populate the South Boston St. Patrick’s Day Parade, converging from areas including Florida, Pennsylvania, Ireland, and Scotland. Along with legions of color guards, kiltie bands, majorettes, Clydesdales, and politicos, the route is ridden by more than 50 naval officers from a ship docked on Southie’s waterfront. The parade attracts more than 650,000 revelers.

Chicago, IL
• The City of Chicago boasts two St. Patrick’s Day parades, including Forever Green, a charitable event celebrating its 40th year in 2014. The event takes place in the Grand Ballroom of Navy Pier. Chicagoans also celebrate St. Patrick’s Day in grand style by dyeing the Chicago River a bright Kelly green.

Denver, CO
• Denver marks St. Patrick’s Day with the annual St. Paddy’s Day 5K Run. Approximately 3,000 people run for the mythical gold at the end of the rainbow – in this case more like bragging rights and good parties at pubs and restaurants throughout the city.

Henderson, NV
• The local St. Patrick’s Day parade moved in 2005 from its traditional home on Las Vegas’ Fremont Street to Water Street in downtown Henderson. The 2014 event, the 47th Southern Nevada Sons of Erin St. Patrick’s Day Parade & Festival, included four days of holiday celebrations with a carnival, festival, car show, and live entertainment.

Kansas City, MO
• Kansas City’s largest single-day event is the annual St. Patrick’s Day Parade, colorfully illustrated by dozens of floats, drill teams, bands, and equestrian teams. Covering a 30-block corridor from Crown Center into the heart of the downtown district, the event has grown since 1973 into one of the country’s largest displays of Irish pride. Crowds are estimated at 400,000.

New York, NY
• The largest St. Patrick’s Day gathering is New York’s St. Patrick’s Day Parade. There are typically about 150,000 marchers in the parade, a number that is eclipsed by the estimated two million spectators.

Portland, OR
• In Portland, Kells Pub and Restaurant, which has been running its Irish Festival since the late 1980s, has become a venerable tradition. Every year on St. Patrick’s Day – plus the nearest weekend – the pub bursts at the seams, spilling out into tents behind the establishment and across the street. For four days, the two tents
and Kells itself become Portland’s mini-Ireland for the city’s biggest St. Patrick’s festival. The tents host one musical act after another, including local bands and Irish musicians.

San Antonio, TX
• One of San Antonio’s annual St. Patrick’s Day tributes to Ireland and Texans of Irish descent is the Dyeing O’ the River Green Parade. As a half-mile stretch of the San Antonio River undergoes a striking transformation, riverside spectators join the fun as colorfully decorated river barges ferry green clad celebrants to the end point of the parade at La Villita’s Arneson Theatre.

San Diego, CA
• In San Diego, the traditional sounds of Ireland fill Copley Symphony Hall as the San Diego Symphony accompanies a variety of Irish-themed performers.

Savannah, GA
• According to the Savannah Area Convention & Visitors Bureau, 500,000 to 700,000 revelers attend the annual parade. There are no economic impact figures, but it is the busiest time of the year for most of the city’s downtown retailers, hotels, restaurants, and bars.

Seattle, WA
• Seattle, the official sister city of Galway, Ireland, hosts the annual Seattle Irish Festival. A performing stage runs continuous entertainment featuring local groups that deliver a true sampling of Irish music. Seattle also hosts the 3.5-mile St. Patrick’s Day Dash; a post-race party includes a beer garden.

St. Louis, MO
• The St. Patrick’s Day Parade in St. Louis probably brings more people to downtown in one day than any other yearly celebration in the city, including Cardinals games. In 2014, some 350,000 revelers converged around Market Street and the immediate vicinity for the 46th annual procession.

When March 17th falls on a weekday, celebrations take place on the prior and following weekend as well.

It is interesting to note that the first St. Patrick’s Day parade was not held in Ireland, but in New York City in 1766.

29.7 Easter

Easter is the sixth most popular holiday or occasion to dine out, after birthdays, Mother’s Day, Valentine’s Day, Father’s Day, and New Year’s. According to the National Restaurant Association, 13% of Americans dine out on Easter Sunday.
Easter is celebrated with parades, festivals, and egg hunts. The following is a sampling of Easter activities held throughout the United States:

**Asheville, NC**
- Egg hunts are held on the front lawn of the Biltmore Estate for children ages 2-to-9. The celebration also includes a magic show, music, children’s crafts, and visits from the Easter Bunny.

**Cincinnati, OH**
- At Cincinnati Zoo’s Easter Celebration, the zoo’s residents search for Easter eggs made of painted honeydew melons and colorful blocks of ice while visitors search for candy at treat stations.

**New York, NY**
- There are no floats or marching bands at the Annual Easter Parade in New York City, a perennial favorite; this annual event focuses on colorful costumes and bonnets.

**Oakland, CA**
- At Dunsmuir Historic Estate visitors to An Old-Fashioned Easter Celebration participate in egg hunts and egg decorating, tour the mansion, and visit with the Easter Bunny.

**Richmond, VA**
- Easter on Parade, an annual street festival on Monument Avenue, features live music, clowns, jugglers, crafts, and food.

**Salt Lake City, UT**
- At Hogle Zoo’s Egg-Zoo-berunt Easter Celebration, the Easter Bunny hands out treats to children and guests who watch the zoo’s animals receive papier-mâché Easter eggs filled with the animal’s favorite treats.

**San Francisco, CA**
- Union Street Easter Parade & Spring Celebration includes an Easter bonnet contest, a climbing wall, costumed characters, a petting zoo, and pony rides.

### 29.8 Cinco de Mayo

Cinco de Mayo, a Mexican holiday, has become big business in the United States. Although most do not know the significance of May 5, 1862, when a small Mexican force defeated a much larger French contingent in the Battle Puebla, millions celebrate the day.

According to the Chicano Studies Research Center at UCLA, the United States celebrates Cinco de Mayo on a much larger scale than in Mexico. The holiday was
adopted by Americans from Chicanos living in towns along the Mexican border. Unlike in Mexico, where the holiday is observed with solemn restraint, Americans celebrate it with much fanfare.

U.S. consumers spend an estimated $1 billion during Cinco de Mayo weekend on everything from barbecues to amusement park visits and music festivals, according to The Wall Street Journal. There is as much as $500 million in increased spending at supermarkets for the occasion. Some major league baseball teams increase revenues by $1 million per game when the holiday falls on a weekend.

More than 500 cities across the U.S. have official Cinco de Mayo celebrations, according to The Business of Holidays. Los Angeles, for example, sponsors Fiesta Broadway, which attracts 500,000 visitors every year, along with 130 sponsors. Thousands attend the annual Cinco de Mayo parade in Chicago’s South Side neighborhood of Pilsen. In Saint Paul, Minnesota, the Cinco de Mayo festival is one of the city’s largest, attracting more than 75,000 visitors.

### 29.9 Memorial Day

Memorial Day weekend is observed throughout the United States with many ceremonies, concerts, festivals, performances, and more. The following are some of the celebrations:

**Atlanta, GA**
- The annual 31-day Atlanta Jazz Festival features world renowned jazz artists plus activities throughout the Metro Atlanta area and culminates during Memorial Day weekend with a free festival of dazzling performances in Piedmont Park. Also in the Atlanta area are Memorial Day Weekend Salute to the Troops at Stone Mountain Park and Memorial Day at Callaway Gardens.

**Honolulu, HI**
- One of the most meaningful Memorial Day events is the Lantern Floating Ceremony in Honolulu. Guests are given paper lanterns and a little boat to float the lit lanterns into the water from the beach. At sunset, thousands of these little lights are a reminder of the lives that were lost during past conflicts, an especially moving way to celebrate Memorial Day.

**Indianapolis, IN**
- The running of the Indianapolis 500 has become synonymous with the Memorial Day weekend. The race, 500 Festival, and associated weekend events have an economic impact on the city of Indianapolis of approximately $340 million. The seats at the Indianapolis Motor Speedway – the largest sporting facility in the world with more than 250,000 permanent seats – are reserved months before the race.

**Little Rock, AR**
- Held Memorial Day weekend and attracting more than 250,000 visitors, Riverfest is
Arkansas’s premier music and arts festival. The weekend long event includes bands performing on five stages, a KidZone area with crafts and entertainment, and fireworks over the Arkansas river on Sunday night. Performing artists have included Carrie Underwood, Snoop Dogg, and ZZ Top.

**Miami, FL**
- Miami’s Urban Beach Week focuses primarily on African-American culture and music. The streets and beaches are crowded with up to 350,000 people, while many venues host live music from popular musicians and DJs. Parties are hosted on boat cruises as well as at Miami’s numerous nightclubs. The Best of the Best Concert, an all-day music festival featuring reggae artists and Caribbean music, is the crowning event for the weekend.

**New York, NY**
- Among the most popular Memorial Day festivals is Fleet Week in New York City, where members of the U.S. Armed Forces arrive on ships parading down the Hudson River. One of the most well-known Memorial Day ceremonies is held on the USS Intrepid at Pier 86; the ceremony includes the unfurling of a 100-foot flag, a rifle salute, and a military fly-over. Countless parties and events are held in the city during the week before Memorial Day.

**Washington, DC**
- Perhaps the best-known of Memorial Day ceremonies is the ceremony at Arlington National Cemetery. The service is held at the Tomb of the Unknown Soldier and includes music, speeches, and a wreath-laying ceremony, and thousands of people attend each year, whether they have family members serving in the military or simply want to honor those killed in action. The President frequently delivers the Memorial Day Speech at Arlington National Cemetery; several hundred thousand people attend the ceremony. Also in Washington are the National Memorial Day Concert, the National Memorial Day Parade, and numerous other events.

**29.10 Independence Day**

According to the National Retail Federation, more than 85% of consumers celebrate Independence day. The following are estimates of participation in various activities:
- Picnic or cookout: 125 million (57% of adults)
- Watch fireworks: 85 million (38% of adults)
- Go to a parade: 20 million (9% of adults)
- Travel or go on vacation: 20 million (9% of adults)

Festivities generally center on fireworks displays. *Condé Nast Traveler* and Travel Channel rated the following Independence Day fireworks displays as the best:
across the U.S. in 2014:
• 38th Annual Macy’s 4th of July Fireworks (New York, NY)
• Boston Pops Fireworks Spectacular (Boston, MA)
• Do A.C. 4th of July Fireworks (Atlantic City, NJ)
• Fair Saint Louis (St. Louis, MO)
• Freedom Over Texas (Houston, TX)
• Go 4th on the River and Barges Battle on the Mississippi (New Orleans, LA)
• Independence Day at Navy Pier (Chicago, IL)
• July 4th Celebration at the Pier (San Francisco, CA)
• Kaboom Town! (Addison, TX)
• Let Freedom Sing (Nashville, TN)
• Lights on the Lake (South Lake Tahoe, CA)
• National Mall Independence Day Celebration (Washington, DC)
• Wawa Welcome America! (Philadelphia, PA)

The following are some of the annual Independence Day festivities:

Addison, TX
• Kaboom Town! is the biggest tourist event of the year in Addison. Home to 19,000 residents, 500,000 people swell the Dallas suburb on Independence Day. An airshow by the Cavanaugh Flight Museum precedes the fireworks display.

Atlantic City, NJ
• In Atlantic City, around 10,000 fireworks erupt from three separate spots – two barges and a marina platform – to provide a 360° show. More than 250,000 spectators watch the display.

Boston, MA
• Boston’s Harborfest features more than 200 events, including the Boston Pops Orchestra and fireworks.

Chicago, IL
• Chicago’s Independence Eve Fireworks Spectacular takes place during the annual Taste of Chicago food and entertainment festival in Grant Park. About 125,000 people pass through the gates of Navy Pier to watch the fireworks display.

Houston, TX
• Houston’s Freedom Over Texas July 4th celebration in Eleanor Tinsley Park features pop, Latin, and classic rock musical performances.

Miami, FL
• Miami’s America’s Birthday Bash in Bayfront Park features music, food, and drink.

New York, NY
• Macy’s 4th of July Fireworks is the biggest display in the country, with 40,000 effects
in a 25-minute extravaganza that’s viewed live by 3 million people annually. In 2014 the pyrotechnics were launched from the Brooklyn Bridge and several barges in the East River.

Philadelphia, PA
• WAWA Welcome America!, part of the weeklong Fourth of July celebration in Philadelphia, is watched by an estimated 500,000 people. Festivities in the city culminate with the 4th of July Jam, the largest free concert in the country.

Seattle, WA
• In 2014, Seattle’s 50th Annual Fourth of Jul-Ivar celebration at Myrtle Edwards Park on the waterfront had live music, a kid zone, and a beer and wine garden for adults.

Washington, DC
• Capital Fourth, which follows the Smithsonian Folklife Festival on the National Mall, included a concert by the National Symphony Orchestra on the Capitol West Lawn.

29.11 Labor Day
Labor Day weekend signals the end of summer and the beginning of the school year. Labor Day also marks the start of the National Football League and college football seasons.

There are fewer festivities celebrating Labor Day than for other major holidays as people generally prefer a weekend getaway or simply to relax at home. Among the festivals that are held, most are scheduled to coincide with Labor Day rather than as a celebration of the holiday. Still, there are popular events in several cities, including the following:
• A Taste of Colorado (Denver, CO)
• Bumbershoot (Seattle, WA)
• Celebrate Bandera (Bandera, TX)
• Chicago Jazz Festival (Chicago, IL)
• Detroit Jazz Festival (Detroit, MI)
• Festival of Sail at the Maritime Museum (San Diego, CA)
• Gloucester Schooner Festival (Gloucester, MA)
• Labor Day Mackinac Bridge Walk (Mackinac, MI)
• Made in America Festival (Philadelphia, PA)
• National Symphony Orchestra Labor Day Concert (Washington, DC)
• Point Reyes National Seashore Sculpture Contest (Point Reyes, CA)
• Telluride Film Festival (Telluride, CO)
• Virginia Beach American Music Festival (Virginia Beach, VA)
29.12 Oktoberfest

Oktoberfest has evolved into an annual celebration of beer. Despite the event’s name, most Oktoberfests, including the Munich original, kick off in September. The following are noteworthy Oktoberfest celebrations in the U.S.:

Cincinnati, OH
• Oktoberfest-Zinzinnati is recognized as North America’s largest Oktoberfest, attracting 500,000 annually, of which 125,000 are typically out-of-towners. The festival is celebrated in the heart of the city’s 19th century German-American community in the revitalized Over-the-Rhine neighborhood. According to a study commissioned by the Cincinnati USA Partnership and the Greater Cincinnati Chamber of Commerce, Oktoberfest-Zinzinnati is estimated to have a total business impact of $42.2 million, based on direct spending of $20.4 million.

Daytona Beach, FL
• Daytona Beach’s Biketoberfest attracts more than 100,000 people. The event has been named one of the Top 25 events in the southeast by the Southeast Tourism Society (www.southeasttourism.org).

Helen, GA
• A two-month celebration in Helen, a Bavarian-themed mountain town with a population of 300, attracts 50,000 devotees of beer and bratwurst.

LaCrosse, WI
• The 50-year-old LaCrosse Oktoberfest has earned the reputation as one of the best Old World folk festivals in the U.S.

Seattle, WA
• In the Fremont neighborhood, patrons can sample beer from more than 25 local microwbreweries and watch the annual Texas Chainsaw Pumpkin Carving contest.

Tulsa, OK
• Approximately 200,000 revelers participate in Tulsa’s Oktoberfest, called one of the world’s top German food festivals by Bon Appetit magazine. The International Festivals & Events Association (www.ifea.org) estimated that Tulsa’s Oktoberfest has an economic impact on the community of more than $7.6 million each year.

29.13 Halloween

According to the National Retail Federation, 158 million adults, or 65.8%, celebrated Halloween in 2014, spending $6.9 billion on costumes, treats, and festivities. Spending was distributed as follows:
• Costumes: $2.6 billion
• Candy: $2.1 billion
• Decorations: $2.0 billion
• Greeting cards: $0.4 billion

Adults celebrated Halloween as follows:
• Handed out candy: 72%
• Decorated home/yard: 48%
• Carved a pumpkin: 44%
• Dressed in costume: 44%
• Took children trick-or-treating: 32%
• Hosted/attended a party: 31%
• Visited a haunted house: 20%

There are roughly 2,000 commercial haunted houses in the U.S., according to *Haunt World Magazine*, with annual sales estimated at $1 billion.

*Haunt World Magazine* ranked the most shocking, over the top, extreme, scare houses in America 2013 as follows:
• Erebus 4 Story Haunted Attraction (Pontiac MI; www.hauntedpontiac.com)
• Pennhurst Asylum (Spring City, PA; www.pennhurstasylum.com)
• Haunted Overload Demeritt Farm (Lee, NH; www.hauntedoverload.com)
• Kersey Valley Spookywoods Haunted Attraction (Greensboro, NC; www.spookywoods.com)
• The Dent School House (Cincinnati, OH; www.frightsfeast.com)
• Haunting of Lemp Brewery (St. Louis, MO; www.scarefest.com)
• The Edge of Hell (Kansas City, MO; www.edgeofhell.com)
• Terror Behind the Walls at Eastern State Penitentiary (Philadelphia, PA; www.easternstate.org/halloween)
• The Queen Mary (Long Beach, CA; www.queenmary.com/attractions-events/haunted-encounters.php)
• Nightmare on the Bayou (Houston, TX; www.nightmareonthebayou.com)

New York’s Village Halloween Parade, an annual holiday parade and street pageant staged in Greenwich Village, stretches more than a mile and features 50,000 costumed participants, dancers, artists, circus performers, dozens of floats bearing live bands, and other musical and performing acts. The event draws an estimated two million spectators and a worldwide television audience of one hundred million.

Most of the larger amusement parks make special Halloween attractions and promotions. Knott’s Berry Farm is the ‘grandfather’ of amusement park Halloween promotions, having entered the field in 1973 with a one-day event that now covers almost three weeks. Six Flags began Halloween promotions at its parks in the mid-1970s. Other large parks that have some type of Halloween promotion include Busch Gardens (Tampa, Florida), Cedar Point (Sandusky, Ohio), Disney World (Orlando, Florida), Dorney Park (Allentown, Pennsylvania), and Hersheypark (Hershey, Pennsylvania).

The following are other major family-oriented Halloween attractions:
• Cleveland Metroparks Zoo presents “Boo at the Zoo,” with clowns, magicians, and puppets, along with the ‘Pirates of Lake Erie.’
• The Arizona Science Center (Phoenix) gives visitors a chance to learn Halloween alchemy, with spooky science activities throughout the galleries. Exhibits demonstrate “blood, skeletons, organs, cryogenics, disappearing ink, and slime.”
• At The Roaring Camp Railroad Ghost Train (Felton, California – near Santa Cruz) families can live The Legend of Sleepy Hollow while riding an old-fashioned, narrow-gauge, steam-engine train and following Ichabod Crane’s wild escape from the headless Horseman.
• CATS Haunted Theater (Arlington, Texas), a 27,000 sq. ft. “theater of terror,” is a transformed performing arts theater for kids.
• Balboa Park’s Spreckels Organ Pavilion (San Diego, California) hosts a Halloween Fun Fest and a free family concert with scary organ music and a costume parade.

The following are some other Halloween celebrations:

Anoka, MN
• Anoka persuaded Congress in 1937 to declare it the “Halloween Capital of the United States.” The town now has three Halloween parades, as well as competitions for house decorations, costumes, and pumpkin carving.

Hell, MI
• Hell, a town 45 miles northwest of Detroit, takes advantage of its name. Halloween attractions in the county include corn mazes, cider mills, and a haunted opera house. Nearby Mount Brighton ski resort hosts a 14-room haunted house and renames itself Mount Frighten for the holiday.

Salem, MA
• Salem, where witch trials were held in the 17th century, has long focused on Halloween and draws more visitors in October than in any other month. More than 300,000 people visit the many witch museums and 100 “Haunted Happenings” during the month. The city hosts a costume ball, walking tours, Salem Witches Magickal Arts Fair, and ghost stories performed in dim parlors by actors in period dress. There are costume contests, parades, puppet shows, and ‘Scarecrowquet’ along with a Hay Bale Maze outdoors on the Salem Green.

West Hollywood, CA
• West Hollywood holds a Halloween Carnaval that draws 400,000 people to a mile-long stretch of Santa Monica Boulevard. The event doesn’t make money for the city of West Hollywood, which spends about $250,000 on security, but the festivities bring in about $8 million for local businesses, according to the West Hollywood Convention and Visitors Bureau. The Carnaval, which began in 1987 as a costume competition, now has corporate sponsors.
According to Prosper Insights & Analytics (www.gopro sper.com), 21.7 million people dressed up their pets for Halloween in 2013, spending an estimated $330 million on costumes.

29.14 Thanksgiving

Thanksgiving is typically a holiday celebrated with family and friends. According to The NPD Group (www.npd.com), 64% of American households eat at home on Thanksgiving; about one-half prepare turkey. Among the other 36%, about two-thirds dine at the home of family or friends and one-third eat in restaurants.

Thanksgiving activities are held throughout the U.S., typically on the weekend prior to the Thursday holiday. The following are among the prominent celebrations:

Chicago, IL
• The Chicago Toy and Game Fair, held at Navy Pier and the largest toy and game show open to the public, is scheduled for the week prior to Thanksgiving.

Cleveland, OH
• Cleveland Metroparks Zoo hosts Thanksgiving at the Zoo, where guests can ride through the zoo in a heated shuttle bus while watching the animals enjoy their Thanksgiving Day. Demonstrations typically include giving pumpkins or papier-mâché seals to the polar bears, frozen fish inside blocks of ice for polar bears, swamp monkeys bobbing for cranberries, and a hanging papier-mâché beehive filled with treats for the sloth bears. There is no admission for the event.

Dallas, TX
• The Dallas Texas Turkey Trot, a tradition for nearly 40 years, features an 8-mile run/walk for marathoners, a 3 mile run/walk for those looking for something more casual, and a tot trot for kids. An estimated 40,000 people participate in the event.

New York, NY
• Among annual parades held across the U.S., Macy’s Thanksgiving Day Parade is the largest, with the number of spectators typically in the 3½ million range. An additional 22 million watch the broadcast on NBC.

Plymouth, MA
• America’s Hometown Thanksgiving Celebration is held annually in the town where the pilgrims first landed. At the Wampanoag Pavilion, celebration guests learn about the native people of the area, watch a reenactment of the first Thanksgiving, and tour the Mayflower II. The highlights of the celebration are the Thanksgiving parade and the New England Food Festival.
Tempe, AZ
• Thanksgiving at the Arizona Sea Life Aquarium features some of the animals enjoying their Thanksgiving dinners.

Williamsburg, VA
• Visitors who tour Colonial Williamsburg can enjoy a Thanksgiving feast at one of the many restaurants which offer dishes hailing from the 18th century.

29.15 Christmas
Many cities boast unique Christmas celebrations. The Christmas lights display at Oglebay Park (Wheeling, West Virginia) is considered one of the best. Niagara Fall’s Festival of Lights attracts two million visitors annually. Cannons herald Colonial Williamsburg’s Grand Illumination. Bonfires along the levee light the way for Papa Noel in New Orleans. In South Carolina, African-American spirituals from the Sea Islands are sung at Charleston’s Drayton Hall.

San Antonio is made even more magical at Christmas time by the lights twinkling on bridges and cascading from tree branches. A Nativity pageant is staged at the Rivercenter shopping and entertainment complex, “Holiday in the Park” at Six Flags Fiesta Texas, and Pancho Claus, a Hispanic St. Nick, reigns over the Fiestas Navidenas in Market Square.

The following are Christmas attractions in other cities:

Asheville, NC
• The Omni Grove Park Inn hosts one of the best hotel festivities in the U.S., with dozens of creatively decorated Christmas trees lining the halls and an annual gingerbread house contest.

Denver, CO
• The Denver City and County Building is transformed into the “World’s Largest Christmas Lighting Display” for the season.

Los Angeles, CA
• Los Angeles celebrates its multicultural heritage with two major festivals. Las Posadas, a Mexican Christmas procession that reenacts the journey of Mary and Joseph to Bethlehem, takes place Christmas Eve on downtown’s Olvera Street. The city’s annual Kwanzaa Gwaride Festival at Leimert Park Village includes a marketplace with foods, crafts, and other goods from throughout the African world.

Mystic, CT
• Mystic offers the sights, sounds, and smells of a bygone era with Mystic Seaport’s Lantern Light Tours. The world-famous maritime museum gives visitors a peek at Christmas Eve in a New England village more than 100 years ago. Christmas enchantment continues in nearby Olde Mistick Village, a recreated 18th century
New England town.

**Orlando, FL**
- On the weekend prior to Thanksgiving and through December, Epcot at Walt Disney World Resort is transformed into the Epcot Candlelight Processional, a celebration of holidays from around the world. There is a re-telling of the story of Christmas, accompanied by a 50-piece orchestra and narrated by different celebrity hosts throughout the event.

**SeaWorld Parks in Orlando, San Diego, and San Antonio**
- Starting the day after Thanksgiving, SeaWorld’s Christmas Celebration features several special shows. In Shamu Christmas - Miracles, killer whales soar through the air in a display of aerobatics accompanied by seasonal music. There is also the Sesame Street Christmas and Sea of Trees, with more than 100 beautiful Christmas trees lighting up the water.

**St. Augustine, FL**
- St. Augustine, the nation’s oldest city, commemorates the season with Night of Lights, a two-month festival of home tours, dance, musical and choral performances, and historical reenactments.

  The following small towns are recognized for their Christmas festivities:
  - Alexandria, VA
  - Durango, CO
  - Kennebunkport, ME
  - Levanworth, WA
  - Mackinac Island, MI
  - Mountain View, AR
  - Woodstock, VT

  According to Minami International (www.minami.com), a holiday lights manufacturer, more than 80 million homes in the U.S. are decorated for Christmas every year.
30

HUNTING & SHOOTING SPORTS

30.1 Overview
Shooting sports include hunting and target sports. Target sports include competitive and informal trap and skeet shooting, metallic silhouette, sporting clays, action pistol, smallbore rifle and pistol, and Olympic shooting.

According to the National Shooting Sports Foundation (NSSF, www.nssf.org), more than 40 million Americans participate at least once a year in hunting or recreational shooting. By comparison, 25 million people play golf and 18 million people play tennis at least once a year.

“This may come as a rude shock to fans of traditional country club sports, but more Americans take part in sports involving guns than play tennis and golf combined.”

The New York Times

30.2 Participation
According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), the number of people participating in shooting sports in 2013 was as follows:

- Hunting - handgun: 3.2 million
- Hunting - rifle: 9.8 million
- Hunting - shotgun: 7.9 million
- Shooting - sporting clays: 4.4 million
- Shooting - trap/skeet: 3.8 million
- Target shooting - handgun: 14.3 million
- Target shooting - rifle: 13.0 million
Casual participation (<8 times per year) and core participation (>8 times per year) have been as follows:

### Hunting - handgun

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.7 million</td>
<td>1.1 million</td>
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<tr>
<td>2009</td>
<td>2.6 million</td>
<td>961,000</td>
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<tr>
<td>2010</td>
<td>2.5 million</td>
<td>912,000</td>
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<tr>
<td>2011</td>
<td>2.7 million</td>
<td>1.1 million</td>
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<tr>
<td>2012</td>
<td>3.1 million</td>
<td>1.2 million</td>
</tr>
<tr>
<td>2013</td>
<td>3.2 million</td>
<td>1.1 million</td>
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</table>

### Hunting - rifle

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>7.0 million</td>
<td>3.5 million</td>
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<td>2009</td>
<td>7.5 million</td>
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<tr>
<td>2010</td>
<td>7.7 million</td>
<td>3.0 million</td>
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<td>2011</td>
<td>7.3 million</td>
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<td>2012</td>
<td>7.3 million</td>
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<tr>
<td>2013</td>
<td>7.1 million</td>
<td>2.7 million</td>
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### Hunting - shotgun

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>4.3 million</td>
<td>4.3 million</td>
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<tr>
<td>2009</td>
<td>4.6 million</td>
<td>4.0 million</td>
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<tr>
<td>2010</td>
<td>4.5 million</td>
<td>3.8 million</td>
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<tr>
<td>2011</td>
<td>4.2 million</td>
<td>4.1 million</td>
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<tr>
<td>2012</td>
<td>4.5 million</td>
<td>3.9 million</td>
</tr>
<tr>
<td>2013</td>
<td>4.8 million</td>
<td>3.1 million</td>
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</tbody>
</table>

### Shooting - sporting clays

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.7 million</td>
<td>1.5 million</td>
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<tr>
<td>2009</td>
<td>2.7 million</td>
<td>1.5 million</td>
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<tr>
<td>2010</td>
<td>2.8 million</td>
<td>1.5 million</td>
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<tr>
<td>2011</td>
<td>2.9 million</td>
<td>1.4 million</td>
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<tr>
<td>2012</td>
<td>3.1 million</td>
<td>1.5 million</td>
</tr>
<tr>
<td>2013</td>
<td>3.1 million</td>
<td>1.4 million</td>
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</tbody>
</table>

### Shooting - trap/skeet

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.1 million</td>
<td>1.4 million</td>
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<tr>
<td>2009</td>
<td>2.2 million</td>
<td>1.3 million</td>
</tr>
<tr>
<td>2010</td>
<td>2.3 million</td>
<td>1.2 million</td>
</tr>
<tr>
<td>2011</td>
<td>2.2 million</td>
<td>1.2 million</td>
</tr>
</tbody>
</table>
• 2012: 2.2 million 1.4 million
• 2013: 2.5 million 1.3 million

**Target shooting - handgun**

<table>
<thead>
<tr>
<th></th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>6.8 million</td>
<td>5.8 million</td>
</tr>
<tr>
<td>2009</td>
<td>7.3 million</td>
<td>5.6 million</td>
</tr>
<tr>
<td>2010</td>
<td>7.3 million</td>
<td>5.1 million</td>
</tr>
<tr>
<td>2011</td>
<td>8.1 million</td>
<td>5.5 million</td>
</tr>
<tr>
<td>2012</td>
<td>9.0 million</td>
<td>6.4 million</td>
</tr>
<tr>
<td>2013</td>
<td>8.4 million</td>
<td>6.0 million</td>
</tr>
</tbody>
</table>

**Target shooting - rifle**

<table>
<thead>
<tr>
<th></th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>7.1 million</td>
<td>5.7 million</td>
</tr>
<tr>
<td>2009</td>
<td>7.5 million</td>
<td>5.5 million</td>
</tr>
<tr>
<td>2010</td>
<td>7.6 million</td>
<td>5.0 million</td>
</tr>
<tr>
<td>2011</td>
<td>7.8 million</td>
<td>5.2 million</td>
</tr>
<tr>
<td>2012</td>
<td>7.9 million</td>
<td>5.9 million</td>
</tr>
<tr>
<td>2013</td>
<td>7.6 million</td>
<td>5.4 million</td>
</tr>
</tbody>
</table>

### 30.3 Demographics

The NSSF provides the following demographic profile for participants in the shooting sports disciplines:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Archery</th>
<th>Firearms Hunting</th>
<th>Bow Hunting</th>
<th>Sporting Clays</th>
<th>Trap/Skeet</th>
<th>Target Shooting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>35.6%</td>
<td>18.5%</td>
<td>15.4%</td>
<td>18.9%</td>
<td>16.3%</td>
<td>26.8%</td>
</tr>
<tr>
<td>Male</td>
<td>64.4%</td>
<td>81.5%</td>
<td>84.6%</td>
<td>81.1%</td>
<td>83.7%</td>
<td>73.2%</td>
</tr>
</tbody>
</table>

**Age**

<table>
<thead>
<tr>
<th></th>
<th>6-to-11</th>
<th>12-to-17</th>
<th>18-to-24</th>
<th>25-to-34</th>
<th>35-to-44</th>
<th>45-to-54</th>
<th>55-to-64</th>
<th>65 and older</th>
<th>Average age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>27.1%</td>
<td>24.1%</td>
<td>15.4%</td>
<td>12.7%</td>
<td>7.4%</td>
<td>6.9%</td>
<td>5.8%</td>
<td>0.6%</td>
<td>23.0</td>
</tr>
<tr>
<td>Leisur</td>
<td>4.8%</td>
<td>14.2%</td>
<td>13.3%</td>
<td>17.7%</td>
<td>18.5%</td>
<td>16.9%</td>
<td>9.9%</td>
<td>4.7%</td>
<td>35.7</td>
</tr>
<tr>
<td>Business</td>
<td>3.2%</td>
<td>10.6%</td>
<td>8.6%</td>
<td>26.9%</td>
<td>21.6%</td>
<td>19.3%</td>
<td>7.2%</td>
<td>2.6%</td>
<td>35.9</td>
</tr>
<tr>
<td>Market</td>
<td>4.8%</td>
<td>15.5%</td>
<td>17.2%</td>
<td>16.0%</td>
<td>14.5%</td>
<td>20.3%</td>
<td>9.5%</td>
<td>2.2%</td>
<td>34.3</td>
</tr>
<tr>
<td>Research</td>
<td>2.6%</td>
<td>19.4%</td>
<td>20.7%</td>
<td>14.4%</td>
<td>14.5%</td>
<td>16.0%</td>
<td>9.6%</td>
<td>2.8%</td>
<td>32.9</td>
</tr>
<tr>
<td>Handbook</td>
<td>5.4%</td>
<td>8.9%</td>
<td>11.6%</td>
<td>20.1%</td>
<td>21.3%</td>
<td>20.2%</td>
<td>8.9%</td>
<td>3.4%</td>
<td>36.6</td>
</tr>
</tbody>
</table>

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30.4 FWS Survey

The U.S. Fish and Wildlife Service (FWS, www.fws.gov) conducts the National Survey of Fishing, Hunting, and Wildlife Related Recreation every five years. The most recent report was published in September 2012. According to the survey, 13.7 million people 16 years old and older hunted in 2011. Of those who hunted, 21% traveled to other states to do so. Hunters spent more than $33.7 billion in 2011.

According to the FWS survey, 13.7 million hunters spent an average of 17 days hunting. Big game hunting was the most popular type of hunting, with almost 11.6 million hunters devoted to the sport. Small game hunting attracted 4.5 million to the activity, there were 2.6 million migratory bird hunters, and 2.2 million hunters sought other animals such as raccoons and feral pigs. Spending for these activities was as follows:

- Big game: $16.9 billion
- Small game: $ 2.6 billion
- Migratory birds: $ 1.8 billion
- Other animals: $ 0.9 billion
- Nonspecific: $11.6 billion

Comparing results from the 2007 FWS survey with those of the 2012 survey reveals the number of hunters increased by a modest 1% over the period. Hunting-related expenditures, however, increased 8.2% during the period.

30.5 State-by-State Assessment

According to the U.S. Fish and Wildlife Service, the total number of sportspersons (ages 16 years and older) who hunt are as follows (percent of population in parenthesis):

<table>
<thead>
<tr>
<th>State</th>
<th>Hunted Only</th>
<th>Hunted and Fished</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>228,000 (6%)</td>
<td>264,000 (7%)</td>
</tr>
<tr>
<td>Alaska</td>
<td>24,000 (5%)</td>
<td>82,000 (16%)</td>
</tr>
<tr>
<td>Arizona</td>
<td>135,000 (3%)</td>
<td>124,000 (2%)</td>
</tr>
<tr>
<td>Arkansas</td>
<td>105,000 (5%)</td>
<td>214,000 (10%)</td>
</tr>
<tr>
<td>California</td>
<td>198,000 (1%)</td>
<td>269,000 (1%)</td>
</tr>
<tr>
<td>Colorado</td>
<td>60,000 (2%)</td>
<td>99,000 (3%)</td>
</tr>
<tr>
<td>Connecticut</td>
<td>*</td>
<td>76,000 (3%)</td>
</tr>
<tr>
<td>Delaware</td>
<td>9,000 (1%)</td>
<td>14,000 (2%)</td>
</tr>
<tr>
<td>Florida</td>
<td>78,000 (1%)</td>
<td>252,000 (2%)</td>
</tr>
<tr>
<td>Georgia</td>
<td>138,000 (2%)</td>
<td>171,000 (2%)</td>
</tr>
<tr>
<td>Hawaii</td>
<td>*</td>
<td>21,000 (2%)</td>
</tr>
<tr>
<td>Idaho</td>
<td>*</td>
<td>119,000 (10%)</td>
</tr>
<tr>
<td>Illinois</td>
<td>252,000 (3%)</td>
<td>260,000 (3%)</td>
</tr>
<tr>
<td>Indiana</td>
<td>56,000 (1%)</td>
<td>322,000 (6%)</td>
</tr>
<tr>
<td>Iowa</td>
<td>64,000 (3%)</td>
<td>152,000 (6%)</td>
</tr>
<tr>
<td>State</td>
<td>Shooting Ranges</td>
<td>Total Revenue</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Kansas</td>
<td>18,000 (1%)</td>
<td>159,000 (7%)</td>
</tr>
<tr>
<td>Kentucky</td>
<td>151,000 (4%)</td>
<td>165,000 (5%)</td>
</tr>
<tr>
<td>Louisiana</td>
<td>69,000 (2%)</td>
<td>222,000 (6%)</td>
</tr>
<tr>
<td>Maine</td>
<td>37,000 (3%)</td>
<td>104,000 (10%)</td>
</tr>
<tr>
<td>Maryland</td>
<td>*</td>
<td>72,000 (2%)</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>*</td>
<td>59,000 (1%)</td>
</tr>
<tr>
<td>Michigan</td>
<td>170,000 (2%)</td>
<td>337,000 (4%)</td>
</tr>
<tr>
<td>Minnesota</td>
<td>71,000 (2%)</td>
<td>403,000 (10%)</td>
</tr>
<tr>
<td>Mississippi</td>
<td>96,000 (4%)</td>
<td>340,000 (15%)</td>
</tr>
<tr>
<td>Missouri</td>
<td>132,000 (3%)</td>
<td>363,000 (8%)</td>
</tr>
<tr>
<td>Montana</td>
<td>30,000 (4%)</td>
<td>78,000 (10%)</td>
</tr>
<tr>
<td>Nebraska</td>
<td>61,000 (4%)</td>
<td>54,000 (4%)</td>
</tr>
<tr>
<td>Nevada</td>
<td>15,000 (1%)</td>
<td>34,000 (2%)</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>*</td>
<td>39,000 (4%)</td>
</tr>
<tr>
<td>New Jersey</td>
<td>30,000 (&lt;½%)</td>
<td>86,000 (1%)</td>
</tr>
<tr>
<td>New Mexico</td>
<td>21,000 (1%)</td>
<td>47,000 (3%)</td>
</tr>
<tr>
<td>New York</td>
<td>172,000 (1%)</td>
<td>567,000 (4%)</td>
</tr>
<tr>
<td>North Carolina</td>
<td>88,000 (1%)</td>
<td>230,000 (3%)</td>
</tr>
<tr>
<td>North Dakota</td>
<td>17,000 (3%)</td>
<td>34,000 (7%)</td>
</tr>
<tr>
<td>Ohio</td>
<td>168,000 (2%)</td>
<td>360,000 (4%)</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>*</td>
<td>193,000 (7%)</td>
</tr>
<tr>
<td>Oregon</td>
<td>58,000 (2%)</td>
<td>123,000 (4%)</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>269,000 (3%)</td>
<td>434,000 (4%)</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>*</td>
<td>16,000 (2%)</td>
</tr>
<tr>
<td>South Carolina</td>
<td>42,000 (1%)</td>
<td>196,000 (6%)</td>
</tr>
<tr>
<td>South Dakota</td>
<td>27,000 (4%)</td>
<td>106,000 (17%)</td>
</tr>
<tr>
<td>Tennessee</td>
<td>91,000 (2%)</td>
<td>196,000 (4%)</td>
</tr>
<tr>
<td>Texas</td>
<td>356,000 (2%)</td>
<td>724,000 (4%)</td>
</tr>
<tr>
<td>Utah</td>
<td>55,000 (3%)</td>
<td>106,000 (5%)</td>
</tr>
<tr>
<td>Vermont</td>
<td>30,000 (6%)</td>
<td>41,000 (8%)</td>
</tr>
<tr>
<td>Virginia</td>
<td>135,000 (2%)</td>
<td>219,000 (4%)</td>
</tr>
<tr>
<td>Washington</td>
<td>54,000 (1%)</td>
<td>165,000 (3%)</td>
</tr>
<tr>
<td>West Virginia</td>
<td>83,000 (6%)</td>
<td>128,000 (9%)</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>260,000 (6%)</td>
<td>504,000 (11%)</td>
</tr>
<tr>
<td>Wyoming</td>
<td>30,000 (7%)</td>
<td>46,000 (11%)</td>
</tr>
</tbody>
</table>

* Sample size too small to report data reliably

### 30.6 Shooting Ranges

According to IBISWorld (www.ibisworld.com), there are 2,138 shooting ranges in the United States; combined revenue is $536 million.
30.7 Sporting Clays

Sporting clays, a British import, has gained in popularity in the United States in the last two decades, in part because it does not carry the stigmas associated with wounding or killing wildlife. In fact, sporting clays is often described as golf with a shotgun because it poses the challenge of completing an outdoor course where terrain and weather conditions are important factors. But to sporting clays enthusiasts, the allure of their game is primal, unlike golf, because it harks back to the ancient urge to hunt. The NSSF estimates that nine million target shooters have taken part in sporting clays.

Public and private sporting clays sites are located throughout the U.S. The private Pawling Mountain Club in Pawling, New York, is regarded as the sporting clays equivalent of Shinnecock Hills, the private club in Southampton, New York, where the United States Open golf championship was held recently. Other top sites include the M&M Hunting Preserve and Sporting Clays (Pennsville, New Jersey), Homestead (Hot Springs, Virginia), Lanai Pine on the Hawaiian island of Lanai, Orvis Sandanona (Millbrook, New York), and Tamarack Preserve (Millbrook, New York).

30.8 Market Resources

National Shooting Sports Foundation, 11 Mile Hill Road, Newtown, CT 06470.
(203) 426-1320. (www.nssf.org)

Shooting Ranges in the U.S., IBISWorld, October 2013.
(www.ibisworld.com/industry/shooting-ranges.html)

U.S. Fish & Wildlife Service, 1849 C Street NW, Room 3331, Washington, DC 20240.
(202) 208-4717. (www.fws.gov)
31

INDOOR RECREATION

31.1 Billiards/Pool

Cue sports include pool or pocket billiards (e.g., eight-ball, nine-ball, one-pocket, straight pool, bank pool, rotation, and other games), English billiards, carom pool (three-cushion, straight-rail, Artistic billiards, five-pins, and other games), and snooker.

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (SFIA, www.sfia.org), 34.6 million people play billiards/pool at least once a year – 23.2 million are casual participants (<13 times per year) and 11.4 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>31.3 million</td>
<td>18.7 million</td>
</tr>
<tr>
<td>2009</td>
<td>29.6 million</td>
<td>16.4 million</td>
</tr>
<tr>
<td>2010</td>
<td>26.6 million</td>
<td>14.6 million</td>
</tr>
<tr>
<td>2011</td>
<td>24.7 million</td>
<td>12.1 million</td>
</tr>
<tr>
<td>2012</td>
<td>23.6 million</td>
<td>11.1 million</td>
</tr>
<tr>
<td>2013</td>
<td>23.2 million</td>
<td>11.4 million</td>
</tr>
</tbody>
</table>

The American Poolplayers Association (www.poolplayers.com), with 260,000 members, dubs itself the world’s largest amateur pool league. At the national level, the APA guarantees more than $1 million in national tournament prize money. This consists of the $500,00 APA 8-Ball National Team Championships, the $250,000 APA 8-Ball Classic, the $100,000 APA 9-Ball National Team Championship, the $100,00 APA 9-Ball Shootout, and the MiniMania tournaments, which paid nearly $250,000 during the 2014 National Team Championships, held August 14-23 in Las Vegas.

According to IBISWorld (www.ibisworld.com), there are 5,098 billiards and pool halls in the United States; combined revenue is $750 million.

Directories of pool halls and billiards parlors are available online at the following websites:

- www.BilliardsFinder.com
- www.PlanJam.com
31.2 Bowling

Bowling is returning as a favorite American pastime. Luxury bowling centers that let bowlers enjoy the sport in a nightclub atmosphere have sparked the revival.

“Don’t expect old-school standards like greasy onion rings and fries on the menu at modern bowling alleys. High-backed booths and leather sofas fill these hot spots, offering colorful martinis, plasma-screen televisions, dimmed lights, and a food and wine menu to rival any white-tablecloth joint.”

USA Today

According to SFIA, 46.2 million people bowl at least once a year – 35.7 million are casual participants (<13 times per year) and 10.5 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>45.0 million</td>
<td>14.5 million</td>
</tr>
<tr>
<td>2009</td>
<td>44.6 million</td>
<td>13.4 million</td>
</tr>
<tr>
<td>2010</td>
<td>43.7 million</td>
<td>12.9 million</td>
</tr>
<tr>
<td>2011</td>
<td>42.4 million</td>
<td>11.5 million</td>
</tr>
<tr>
<td>2012</td>
<td>37.9 million</td>
<td>10.7 million</td>
</tr>
<tr>
<td>2013</td>
<td>35.7 million</td>
<td>10.5 million</td>
</tr>
</tbody>
</table>

According to Bowling Centers Industry Profile, a June 2014 report by First Research (www.firstresearch.com), the U.S. bowling center industry includes about 4,000 centers with combined annual revenue of about $3 billion. Major companies include Brunswick Corporation, AMF Bowling Worldwide, and Bowl America. The industry is fragmented; the Top 50 companies generate about 30% of sales.

IBISWorld assesses the industry similarly, estimating there are 3,523 bowling centers in the United States; combined revenue is $3 billion.

Lucky Strike (www.bowluckystrike.com), an 18-location chain, Bowl Mor (www.bowlmor.com), with 20 locations, and Splitsville (www.splitsvillelanes.com), with six locations, are spreading the concept of upscale bowling nationally. Some independent bowling centers including RedPin (Oklahoma City, OK; www.bowlredpin.com) and Garage Billiards & Bowl (Seattle; www.garagebilliards.com), among others.
Las Vegas has several luxury bowling venues co-located at casino resorts. Red Rock Lanes (www.redrocklanes.com), at the Red Rock Casino Resort Spa, for example, has 72 lanes, private VIP lanes ($3,000 to $5,000), video games embedded into bar tops, and a lounge with bottle service.

### 31.3 Darts

Darts is most popular in bars and pubs, with the most serious participants playing in leagues.

According to SFIA, 16.6 million people play darts at least once a year – 11.3 million are casual participants (<13 times per year) and 5.3 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>15.8 million</td>
<td>8.2 million</td>
</tr>
<tr>
<td>2009</td>
<td>14.4 million</td>
<td>7.3 million</td>
</tr>
<tr>
<td>2010</td>
<td>12.7 million</td>
<td>6.4 million</td>
</tr>
<tr>
<td>2011</td>
<td>11.7 million</td>
<td>5.5 million</td>
</tr>
<tr>
<td>2012</td>
<td>11.1 million</td>
<td>5.1 million</td>
</tr>
<tr>
<td>2013</td>
<td>11.3 million</td>
<td>5.3 million</td>
</tr>
</tbody>
</table>

The American Darts Organization (ADO, www.adodarts.com) sanctions local and regional tournaments throughout the U.S. ADO has about 250 member clubs representing roughly 50,000 members.

The sport is most popular in the U.K., where about 4.5 million play in leagues, more than double the number of league players in the U.S.

### 31.4 Table Tennis

According to SFIA, 17.1 million people play table tennis, or ping pong, at least once a year – 12.4 million are casual participants (<13 times per year) and 4.7 million are core participants (>13 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>11.5 million</td>
<td>5.0 million</td>
</tr>
<tr>
<td>2009</td>
<td>12.8 million</td>
<td>5.5 million</td>
</tr>
<tr>
<td>2010</td>
<td>13.2 million</td>
<td>6.1 million</td>
</tr>
<tr>
<td>2011</td>
<td>13.0 million</td>
<td>5.6 million</td>
</tr>
<tr>
<td>2012</td>
<td>12.0 million</td>
<td>4.8 million</td>
</tr>
<tr>
<td>2013</td>
<td>12.4 million</td>
<td>4.7 million</td>
</tr>
</tbody>
</table>

Competitive table tennis is popular in Asia and Europe and has been gaining attention in the U.S. USA Table Tennis (www.teamusa.org/usa-table-tennis/events) is the governing body and organizes tournaments in the United States.

The National Collegiate Table Tennis Association (NCTTA, www.actta.org) is a non-profit organization dedicated to promoting competitive table tennis at the collegiate
level in North America.

North American Table Tennis (NATT, www.natabletennis.com) hosts local and regional tournaments throughout the U.S. NATT’s major event is the North American Teams Championships (NATT Teams) hosted by Joola (www.joolateams.com).

31.5 Market Resources
American Darts Organization, 625 S. Brookhurst Avenue, Suite 543, Anaheim, CA 92804. (714) 254-0212. (www.adodarts.com)


North American Table Tennis, 15800 Crabbs Branch Way, Suite 250, Rockville, MD 20855. (301) 816-0660. (www.natabletennis.com)


Sports & Fitness Industry Association, 8505 Fenton Street, Suite 211, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)
LIFESTYLE COMMUNITIES

32.1 Golf Communities

The traditional golf paradigm – living in an non-descript neighborhood and pursuing the game at local private or public courses – is still most common, especially in the nation’s northern tier. But across the Sun Belt, from the coastal Carolinas and Florida to Southern California, as well as up the Pacific Coast and even into the western mountains, master-planned golf communities are more prevalent. These communities draw not just locals, but also passionate golfers from elsewhere in search of second homes and places to retire.

The first wave of golf communities were developed in the late-1970s and early-1980s. During the past two decades, over 2,500 golf communities have been developed throughout the United States.

When developers were putting up the first golf communities in Florida and the Carolinas, the best buyers might hope for was cookie-cutter fairways squeezed between bland condos. But since the early 1990s, communities have been offering a myriad of amenities along with a sense of endless vacation. In addition to ever higher-quality golf, some communities even dole out perks such as concierge service and access to private jets. Others hire full-time master chefs and nature guides. Spas, horseback riding, hiking-trail networks, marinas, and planned activities for both kids and adults are common.

According to the National Golf Foundation (www.ngf.org), the states with the most golf communities are as follows:

- Florida
- California
- Texas
- North Carolina
- Arizona
- South Carolina
- Georgia
- Michigan

32.2 Hobby Farms

For hobby farmers, raising livestock and tending the land is essentially a leisure endeavor; most hobby farmers earn their living in other professions. Most are rural enthusiasts who live on small-acreage properties. They include homesteaders as well
as those living in rural areas near larger suburban areas. Some hobby farmers raise traditional livestock, like cows, horses, goats, pigs, and chickens, or yield common crops using conventional methods. Others prefer specialities, like raising alternative livestock such as alpacas, emus, Scotch Highland cattle, and other rare breeds, or grow organic produce or plants using heritage seeds. With the ever-increasing attention (and concerns) given to where and how food is produced, hobby farming is of particular appeal to those who want more control over their food source.

There are probably close to one million hobby farmers in the U.S., possibly even more. A census by the Department of Agriculture identified 826,558 farms in the U.S. that generate less than $2,500 in annual sales and an additional 436,494 that have revenue of less than $10,000. It is assumed that the majority of these are hobby farms. A survey by the Ohio Cooperative Extension Service found 61% of the farmers in the state worked part-time off the farm. Applying that statistic to the 2,128,982 farms in the U.S. suggests about 1.3 million hobby farmers.

“The number of farms in the U.S. has been shrinking for seven decades. But the rise of ‘lifestyle,’ or hobby, farms – typically about 30 acres that produce little or no income – promises to halt the decline, say officials at the U.S. Dept. of Agriculture. Largely because of hobby farms, whose numbers are growing 2% a year and now account for about half of all farms, the population of rural counties is up 12% since 1990 – the first gain in such areas since the Depression.”

*Time*

32.3 Retirement Communities

Within the category of retirement communities are a wide spectrum of options. At the high end of the category are Planned Leisure-Oriented Retirement Communities, often referred to as Active Adult Communities. The following are examples:

**On Top of the World** (Ocala, FL; www.ontopoftheworldcommunities.com)
- With approximately 10,000 homes, On Top of the World is one of the largest 55+ communities in the U.S. The community offers virtually every recreational activity imaginable: a fitness center & spa, four 18-hole golf courses, six tennis courts,
basketball courts, indoor racquetball courts, a softball field, and more. Over 15 miles of walking trails wind throughout the community. There are learning classes on topics ranging from traveling and photography to theatrical groups and dancing. An 800-seat cultural center hosts concerts and theater productions. Over 200 organized clubs provide camaraderie among residents with similar interests.

**Sun City** (several locations; [www.delwebb.com](http://www.delwebb.com))
- Developed in 1960 by Del Webb Company, Sun City Arizona was the first leisure-focused retirement community and a model for subsequent communities. There are now 18 Sun City communities in 10 states; all provide a plethora of leisure amenities. Sun City Hilton Head (South Carolina), for example, has four swimming pools, two fitness centers, 10 tennis courts, 54 holes of golf, a grand social hall, and a performing arts center. Sun City Palm Desert (California) includes indoor lap pools, two championship golf courses and three clubhouses with fitness centers, spas, a library, a 200-seat auditorium, an aerobics and dance studio, card rooms, a billiards hall, and bocce ball courts.

**The Villages** (Sumpter County, FL; [www.thevillages.com](http://www.thevillages.com))
- With over 55,000 residents, The Villages is the largest retirement community in the world. The community has 32 golf courses, 53 pools, and 17 recreation centers, each with bocce courts, horseshoes, shuffleboard, and more.

**Westlake Golf & Country Club** (Jackson, NJ; [http://home.my-westlake.com](http://home.my-westlake.com))
- The hub of West Lake is an 18-hole championship golf course. When not golfing, residents can play tennis or make use of various sports courts, which include bocce ball, volleyball, and shuffleboard courts. There are also both indoor and outdoor swimming pools. Special interest clubs include those devoted to birdwatching, gardening, dancing, water color painting, bowling, computers, and wine tasting.

### 32.4 Spa Communities

With the popularity of spas, particularly among the wealthy, it is not surprising that the concept of living at a 365-day-a-year spa appeals to many.

Canyon Ranch ([www.canyonranch.com](http://www.canyonranch.com)), the famed spa located outside Tucson, opened its first residential development in Miami Beach in 2010 to appeal to this market. A high-rise condominium development is also planned on the Miracle Mile in Chicago. And in Tucson, Canyon Ranch is developing homesites on a 30-acre parcel adjacent to its original spa complex, creating a community focused on renewal and healing.

Miraval ([www.miravalresorts.com](http://www.miravalresorts.com)), another Arizona-based spa, brought the spa community concept to its Tucson location with luxury residences that include with ownership more than 100 programs of exercise, meditation, education, and creative arts, plus an array of grooming and wellness services.
LITERARY ACTIVITIES

33.1 Adult Reading

According to *A Snapshot of Reading In America*, a January 2014 report by Pew Research Center (www.pewresearch.org), 76% of adults read at least one book in 2013; 69% read a print book, 28% read an eBook, and 14% listened to an audiobook.

By demographic, those who read at least one book were as follows:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>82%</td>
<td>74%</td>
<td>33%</td>
</tr>
<tr>
<td>Male:</td>
<td>69%</td>
<td>64%</td>
<td>23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-29:</td>
<td>79%</td>
<td>73%</td>
<td>37%</td>
</tr>
<tr>
<td>30-to-49:</td>
<td>75%</td>
<td>66%</td>
<td>32%</td>
</tr>
<tr>
<td>50-to-64:</td>
<td>77%</td>
<td>71%</td>
<td>27%</td>
</tr>
<tr>
<td>65 and older:</td>
<td>70%</td>
<td>66%</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black:</td>
<td>81%</td>
<td>75%</td>
<td>30%</td>
</tr>
<tr>
<td>Hispanic:</td>
<td>67%</td>
<td>56%</td>
<td>16%</td>
</tr>
<tr>
<td>White:</td>
<td>76%</td>
<td>71%</td>
<td>29%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school grad or less:</td>
<td>64%</td>
<td>57%</td>
<td>14%</td>
</tr>
<tr>
<td>Some college:</td>
<td>83%</td>
<td>78%</td>
<td>32%</td>
</tr>
<tr>
<td>College graduate:</td>
<td>88%</td>
<td>78%</td>
<td>45%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household Income</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $30,000:</td>
<td>68%</td>
<td>63%</td>
<td>14%</td>
</tr>
<tr>
<td>$30,000 to $49,999:</td>
<td>75%</td>
<td>70%</td>
<td>28%</td>
</tr>
<tr>
<td>$50,000 to $74,999:</td>
<td>85%</td>
<td>78%</td>
<td>42%</td>
</tr>
<tr>
<td>$75,000 and higher:</td>
<td>83%</td>
<td>74%</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community</th>
<th>Total</th>
<th>Print</th>
<th>eBook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural:</td>
<td>76%</td>
<td>72%</td>
<td>18%</td>
</tr>
<tr>
<td>Suburban:</td>
<td>75%</td>
<td>67%</td>
<td>31%</td>
</tr>
<tr>
<td>Urban:</td>
<td>77%</td>
<td>71%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Pew reported that the mean (average) number of books read in 2013 was 12; the median (midpoint) was 5 books. Data from Ipsos BookTrends (www.ipsos-insight.com/books) is similar to that of Pew, reporting that 73% of adults read at least one book annually. Among those who read, the median number of books read is four. Women and seniors are found to read the most; popular fiction is the top genre.

By age, daily leisure reading time by adults is as follows (source: Bureau of Labor Statistics):
- 20-to-24: 10 minutes
- 25-to-34: 9 minutes
- 35-to-44: 12 minutes
- 45-to-54: 19 minutes
- 55-to-64: 33 minutes
- 65-to-74: 46 minutes

Not surprisingly, reading rates increase according to level of education. The National Endowment for the Arts (NEA, www.arts.gov) reports that 68% of college graduates identify themselves as active readers, compared with 39% of high school graduates and 19% of those who did not graduate from high school.

### 33.2 Most Literate Cities

*America’s Most Literate Cities* (http://web.ccsu.edu/amlc/), published by Central Connecticut State University, ranks the 69 largest U.S. cities (population 250,000 and above) based on adult reading characteristics. Dr. John W. Miller, president of the university, authored the report. The Top 10 most literate cities are as follows:

1. Washington, DC
2. Seattle, WA
3. Minneapolis, MN
4. Atlanta, GA
5. Pittsburgh, PA
6. San Francisco, CA
7. Saint Paul, MN
8. Denver, CO
9. (tie) Portland, OR
9. (tie) St. Louis, MO

The following are percentages of adults in major metropolitan areas who purchased 12 or more books during the past year (source: International Demographics [www.themediaaudit.com]):

- Akron, OH: 24.0%
- Albany-Schenectady-Troy, NY: 28.2%
- Albuquerque, NM: 29.9%
- Allentown-Bethlehem, PA: 36.3%
- Ann Arbor, MI: 39.0%
- Atlanta, GA: 41.3%
- Austin, TX: 39.8%
- Baltimore, MD: 33.7%
- Birmingham, AL: 30.9%
- Boise, ID: 32.7%
- Boston, MA: 42.7%
- Buffalo, NY: 34.6%
- Charleston, SC: 29.6%
- Charlotte, NC: 29.9%
- Chicago, IL: 40.4%
- Cincinnati, OH: 31.2%
- Cleveland, OH: 25.8%
- Colorado Springs, CO: 38.4%
- Columbia, SC: 30.5%
- Columbia-Jefferson City, MO: 31.1%
- Columbus, OH: 31.8%
- Dallas-Ft. Worth, TX: 33.6%
- Dayton, OH: 28.6%
- Denver, CO: 37.5%
- Detroit, MI: 34.6%
- Eugene-Springfield, OR: 32.1%
- Ft. Myers-Naples, FL: 30.3%
- Grand Rapids, MI: 34.2%
- Greensboro, NC: 33.5%
- Greenville-Spartanburg, SC: 33.5%
- Houston, TX: 33.3%
- Indianapolis, IN: 30.5%
- Jacksonville, FL: 30.9%
- Kansas City, MO: 31.9%
- Las Vegas, NV: 30.9%
- Lexington, KY: 38.1%
- Little Rock, AR: 31.2%
- Los Angeles, CA: 30.7%
- Louisville, KY: 35.0%
- Madison, WI: 41.4%
- Melbourne-Titusville-Cocoa, FL: 36.5%
- Memphis, TN: 29.4%
- Miami-Ft. Lauderdale, FL: 25.6%
- Milwaukee-Racine, WI: 33.4%
- Minneapolis-Saint Paul, MN: 36.1%
- Nashville, TN: 31.0%
• New Orleans, LA: 33.5%
• New York, NY: 38.9%
• Norfolk-Virginia Beach-Newport News, VA: 32.5%
• Ocala, FL: 28.8%
• Oklahoma City, OK: 32.6%
• Omaha-Council Bluffs, NE: 38.6%
• Orange County, CA: 34.0%
• Orlando, FL: 37.0%
• Peoria, IL: 27.0%
• Philadelphia, PA: 33.0%
• Phoenix, AZ: 30.1%
• Pittsburgh, PA: 31.1%
• Portland, OR: 38.7%
• Raleigh-Durham, NC: 41.8%
• Reno, NV: 41.8%
• Riverside-San Bernardino, CA: 24.5%
• Rochester, NY: 38.3%
• Sacramento, CA: 34.1%
• Salt Lake City, UT: 36.4%
• San Antonio, TX: 31.4%
• San Diego, CA: 28.5%
• San Francisco, CA: 41.1%
• San Jose, CA: 35.3%
• Seattle-Tacoma, WA: 37.8%
• Southern New Hampshire: 37.2%
• Spokane, WA: 32.1%
• St. Louis, MO: 30.0%
• Syracuse, NY: 25.9%
• Tampa-St. Petersburg, FL: 30.3%
• Toledo, OH: 19.5%
• Tucson, AZ: 34.1%
• Tulsa, OK: 26.1%
• Washington, DC: 44.6%
• West Palm Beach, FL: 28.1%

### 33.3 eBooks

According to Pew Research Center, 50% of adults owned a tablet, an e-reader, or both devices at year-end 2013. Forty-two percent (42%) owned a tablet and 32% owned an e-reader. The growth in use of these devices has paralleled the increase in eBook reading. While 28% of adults read an eBook in 2013, only 17% did so in 2010.

Among adults who owned an eBook reader, a tablet, a desktop, and a smartphone, the following percentages read an eBook on their devices:
In a survey by Harris Interactive (www.harrisinteractive.com), adults reported their reading activities as follows:

- Only read print books: 48%
- Read more print books than eBooks: 17%
- Read print books and eBooks about the same: 14%
- Read more eBooks than print books: 15%
- Only read eBooks: 6%

“According to a March 2014 study by Harris Interactive, U.S. internet users are far more likely to only read printed books than eBooks or a mix of the two. When asked about their attitudes toward reading printed books vs. eBooks, nearly half of respondents said they only read print books. This was far ahead of other responses, with loyal eBook readers grabbing just 6% of the total, and was also the top response across all age groups studied. Only around one-fifth of respondents favored eBooks over hard copy versions.”

eMarketer, 4/30/14

33.4 Book Clubs

According to The Center for the Book (www.read.gov/cfb), an estimated 750,000 people across the U.S. belong to book clubs. In 1994, that number was estimated at only 250,000. There are clubs for mothers and daughters, clubs for mothers and sons, and clubs that read only business books. There are sci-fi clubs, history clubs, gardening book clubs, clubs for seniors, and clubs that meet only online.
### 33.5 Bookstores

According to *Bookstores Industry Profile*, published in December 2014 by First Research (www.firstresearch.com), there are about 8,500 bookstores in the U.S. with combined revenue of approximately $13 billion. The segment is highly concentrated; the 50 largest companies account for about 85% of sales. The largest chains are Barnes & Noble and Books-A-Million.

There are approximately 1,900 independent bookshops in the U.S., according to the American Booksellers Association (www.bookweb.org). While Amazon holds 29% of the book market, followed by Barnes & Noble with 20% marketshare, independent booksellers garner 10% of book sales.

Bookstores are much more than retail outlets – they are cultural and leisure venues for the communities which they serve. Along with their inventory of books, periodicals, and music recordings, bookstores offer book signings, readings by authors, story hours for children, and organized book discussion groups on everything from travel to spirituality. Most larger book stores have coffee shops or cafes to encourage customers to relax and browse.

### 33.6 Book Festivals

Literary festivals are designed to introduce readers to writers and help writers find new readers. Most are free, though some raise money for libraries or other literary groups.

Some of the major book festivals attract up to 500,000 attendees. The following are among the largest annual events:

- AJC Decatur Book Festival (Decatur, GA; www.decaturbookfestival.com)
- LA Times Festival of Books (Los Angeles, CA; http://events.latimes.com/festivalofbooks/)
- Miami Book Fair International (Miami, FL; www.miamibookfair.com)
- National Book Festival (Washington, DC; www.loc.gov/bookfest)
- New York Book Festival (New York, NY; www.newyorkbookfestival.com)
- Southern Festival of Books (Nashville, TN; www.humanitiestennessee.org/programs/southern-festival-books-celebration-written-word)
- Texas Book Festival (Austin, TX; www.texasbookfestival.org)
- Tucson Festival of Books (Tucson, AZ; www.tucsonfestivalofbooks.org)

A schedule of book fairs is available online at www.booktv.org/Book-Fairs.aspx.

### 33.7 Writing

An informal survey by Stack Exchange (http://writers.stackexchange.com) found that 80% of the U.S. population have an interest in writing a book and getting it published sometime in their lifetime. Only a fraction, however, pursue this aspiration.
It is estimated that slightly under one million adults are actually writing seriously with a goal of getting published. Most have a turnaround, or period of time they stick at writing, of about 3.5 years.

The Internet has been a boon for writers who wish to self-publish in electronic format without dealing with a publisher or incurring the cost of publishing in print format. Forbes estimates that about 300,000 to 500,000 books are self-published each year.

Millions of people who write for enjoyment, of course, have no intention of becoming published nor the illusion that they will ever pen a best-seller.

Aspiring writers, and those who simply enjoy literature, attend dozens of writers’ workshops that are held throughout the country. The following are some of the more recognized events:

- Aspen Summer Words Writing Retreat and Literary Festival (Aspen, CO; www.aspenwriters.org)
- Fine Arts Work Center (Provincetown, MA; www.fawc.org)
- Sewanee Writers’ Conference (Sewanee, TN; www.sewaneewriters.org)
- Summer Writing Festival - University of Iowa (Iowa City, IA; www.continueolearn.uiowa.edu/iswfest)
- Taos Summer Writers’ Conference (Taos, NM; http://www.unm.edu/~taosconf/)

The following are popular magazines for writers:

- Poets & Writers (www.pr.org)
- The Writer (www.writermag.com)
- Writer’s Digest (www.writersdigest.com)
- Writer’s Journal (www.writersjournal.com)

### 33.8 Market Resources

Book Industry Study Group, 370 Lexington Avenue, Suite 900, New York, NY 10017. (646) 336-7141. (www.bisg.org)


Pew Research Center, 1615 L Street NW, Washington, DC 20036. (202) 419-4300. (www.pewresearch.org)

LIVESTOCK SHOWS & RODEOS

34.1 Overview
Western lifestyle events are immensely popular in western states and some rural regions throughout the country. For many rural families, participating in or attending livestock events and rodeos is a way of life. Some children start rodeo while young, compete in high school championships, win college scholarships, and hone their skills at rodeo schools. Others begin learning husbandry before they start kindergarten.

34.2 Rodeos
Over 600 professional rodeos are sanctioned annually by the Professional Rodeo Cowboys Association (PRCA, www.prorodeo.com). An estimated 22 million people attend PRCA events annually, and another 40 million watch from home. About 2,500 cowboys and cowgirls participate in PRCA events.

The primary circuit of the PRCA is the Wrangler National Finals Rodeo, which hosted 26 events for the 2014 season. Held each December in Las Vegas, Nevada, the circuit’s main event is attended annually by approximately 170,000 people.

Professional Bull Riders (PBR, www.pbr.com) was created in 1992 when a group of bull riders broke away from the Professional Rodeo and Cowboys Association and started a circuit for bull riders only.

34.3 Fan Demographics
Cities with the highest percentages of adults that are fans of pro rodeo are as follows (sources: Scarborough Sports Marketing [www.scarborough.com] and SportsBusiness Journal):

• Oklahoma City, OK: 18.9%
• Tulsa, OK: 16.5%
• Spokane, WA: 15.2%
• Albuquerque/Santa Fe, NM: 14.7%
• Salt Lake City, UT: 14.5%
• Las Vegas, NV: 13.3%
• Bakersfield, CA: 12.6%
• Denver, CO: 11.9%
• Little Rock/Pine Bluff, AR: 11.6%
According to Scarborough Research (www.scarborough.com), demographics of fans of professional rodeo are as follows:

### Gender
- Female: 45%
- Male: 55%

### Age
- 18-to-24: 12%
- 25-to-34: 17%
- 35-to-44: 18%
- 45-to-54: 21%
- 55-to-64: 15%
- 65 and older: 16%

### Household Income
- Below $35,000: 14%
- $35,000 to $49,999: 22%
- $50,000 to $74,999: 21%
- $75,000 and higher: 28%
- $100,000 and higher: 14%

### Education
- High school graduate: 40%
- Some college: 31%
- College graduate: 16%

### 34.4 Major Events

Attendance at some major rodeo and western lifestyle events is as follows:

- Houston Livestock Show & Rodeo (Houston, TX; [www.rodeohouston.com]): 2.1 million
- San Antonio Stock Show & Rodeo (San Antonio, TX; [www.sarodeo.com]): 1.1 million
- Fort Worth Stock Show and Rodeo (Fort Worth, TX; [www.fwssr.com]): 920,000
- National Western Stock Show (Denver, CO; [www.nationalwestern.com]): 633,000
- Cheyenne Frontier Days (Cheyenne, WY; [www.cfdrodeo.com]): 583,000
- Greeley Independence Stampede (Greeley, CO; [www.greeleystampede.org]): 448,000
34.5 Market Resources

Professional Rodeo Cowboys Association, 101 ProRodeo Drive, Colorado Springs, CO 80919. (719) 593-8840. (www.prorodeo.com)
35.1 Overview

There are a half million model railroaders and toy train hobbyists in the U.S., according to the Train Collectors Association (www.traincollectors.org).

John Sipple, editor of Model Railroad News, estimates the number higher, at one million model railroaders nationwide. That includes everyone from serious enthusiasts to those who get out their train once a year to run it around the Christmas tree.

Model Railroad News estimates spending on model trains at $400 million annually. Model trains are traditionally built from scratch and can takes months to construct. Several manufacturers have begun selling trains and cars that need no assembly, easing the barrier to entry for novice hobbyists.

An increasingly popular activity is garden railroading, a hobby which integrates model railroads into an outdoor garden environment.

35.2 Model Railroad Clubs

Most serious model railroaders belong to one of the more than 100 model railroad clubs across the United States. The following are among the more prominent clubs:

- Arizona Model Railroading Society (Phoenix, AZ; www.azmodelrr.com)
- East Penn Traction Club (Philadelphia, PA; www.eastpenn.org)
- Elmhurst Model Railroad Club (Elmhurst, IL; www.emrrc.org)
- First State Model Railroad Club (Dover, DE; www.fsmrrc.com)
- Golden Empire Historical & Modeling Society (Bakersfield, CA; www.gehams.net)
- Highland Park Society of Model Railroad Engineers (San Gabriel, CA; www.highlandpacificrr.com)
- Lansing Model Railroad Club (Lansing, MI; www.lmrc.org)
- Napa Valley Model Railroad Historical Society (Napa, CA; www.nvmrc.org)
- New York Society of Model Engineers (Carlstadt, NJ; www.nysme.org)
- Pasadena Model Railroad Club (Los Angeles, CA; www.pmrrc.org)
- Piedmont-Triad Model Railroaders Club (Winston-Salem, NC; www.piedmonttriadmodelrailroadersclub.com)
- Railroad Model and Historical Society of Southeastern Ohio (Marion, OH; www.ironheadsofseo.org)
35.3 Model Railroad Museums

Several specialized museums are dedicated to model railroads. The following are among the largest:
- Bay State Model Railroad Museum (Roslindale, MA; www.bsmrm.org)
- Friar Model Railroad Museum (Sparta, NJ; www.fmrm.com)
- Golden State Model Railroad Museum (Point Richmond, CA; www.gsmrm.org)
- Hartman Model Railroad Museum (Intervail, NH; www.hartmannrr.com)
- San Diego Model Railroad Museum (San Diego, CA; www.sdmm.org)
- Twin City Model Railroad Museum (Saint Paul, MN; www.tcmrm.org)
- Western Pennsylvania Model Railroad Museum (Gibsonia, PA; www.wpmm.org)
- Western Reserve Model Railroad Museum (Mentor, OH; www.wrmrm.org)

35.4 The National Train Show

The 25th annual National Train Show, sponsored by the National Model Railroad Association (www.nmra.org), drew over 20,000 people in 2014.

35.5 Market Resources

National Model Railroad Association, P.O. Box 1328, Soddy Daisy, TN 37384. (423) 892-2846. (www.nmra.org)

Train Collectors Association, P.O. Box 248, Strasburg, PA 17579. (717) 687-8623. (www.traincollectors.org)
36

MOTORCYCLING

36.1 Motorcycle Ownership and Spending

There are an estimated 11 million motorcycles in the U.S. An estimated 25 million Americans ride at least once a year.

According to the Motorcycle Industry Council (MIC, www.mic.org), approximately one million new motorcycles are sold in the U.S. annually. Included in the total are about 250,000 scooters.

Packaged Facts (www.packagedfacts.com) estimates the annual U.S. motorcycle market at about $18 billion.

One of the fastest growing segments of the motorcycle business has been sales to women. The increases have been due, in part, to the industry’s marketing efforts toward female bikers. Manufacturers are even designing bikes with a woman’s smaller frame in mind.

“Women riders now represent about 12% of Harley sales compared with 2% in 1995. The brand also has a 53 percentage-point market-share lead among female riders.”

_Bloomberg Businessweek_

Harley-Davidson has 47% of the U.S. marketshare for on-road motorcycles, according to R.L. Polk & Co. (www.polk.com).

_Motorcycle Dealers Industry Profile_, a July 2014 report by First Research (www.firstresearch.com), assesses that the motorcycle dealership sector includes about 4,600 stores; combined annual revenue is about $17 billion. No major retail companies dominate the sector; most have a single retail outlet.
### 36.2 Demographics

While 9% of U.S. adults own a motorcycle, the percentage varies significantly by city. According to International Demographics (www.themediaaudit.com), the following are the cities with the highest percentage of motorcycle ownership:

- Spokane, WA: 18.5%
- Riverside-San Bernardino, CA: 18.4%
- Reno, NV: 15.2%
- Boise, ID: 14.8%
- Salt Lake City, UT: 14.0%
- Eugene-Springfield, OR: 13.8%
- Colorado Springs, CO: 13.1%
- Milwaukee-Racine, WI: 12.9%
- Portland, OR: 12.4%
- Minneapolis, MN: 12.3%

### 36.3 The Motorcyclist Lifestyle

For many motorcyclists, their bikes are more than transportation, they are at the center of a lifestyle. Social motorcyclist organizations are popular; the most well-known of these are the American Motorcyclist Association (www.ama-cycle.com), the Harley Owners Group (H.O.G., www.hog.com), the BMW Motorcycle Owners of America (www.bmwmoa.org), the Honda Rider’s Club of America (www.hrca.honda.com), and the Suzuki Boulevard M109 Club (www.m109owners.com). In addition to the camaraderie, most clubs host rallies, and many raise money for charities through organized events and rides.

Destination Daytona (www.destinationdaytona.com), a motorcycle-themed tourist attraction, opened in Ormond Beach, Florida, in 2007. At the center of the 150-acre complex is the world’s largest Harley-Davidson dealership, with a 53,953 sq. ft. showroom and other chopper shops, including the 7,000 sq. ft. Arlen Ness Motorcycles. The brainchild of Bruce Rossmeyer, operator of the Harley-Davidson dealership, Destination Daytona includes a hotel and condo village, shops, restaurants, bars, and a Daytona Beach Area Convention & Visitors Bureau information center. Expansion plans call for a motorcycle museum and a high-rise hotel.

### 36.4 Motorcycle Rallies

A renewed interest in motorcycling, along with a new group of fans who are interested in the old rallies, has led to huge attendance numbers for classic motorcycle rallies. The top three – Daytona Beach Bike Week, Sturgis Motorcycle Rally, and Laconia – are among the largest events held annually in the U.S. The following is a summary of these and other large events:
Daytona Beach Bike Week (www.officialbikeweek.com)
• Daytona Beach Bike Week, a 10-day event, is held annually in March. Attended by approximately 500,000, festivities include motorcycle racing, concerts, parties, and street festivals.

Honda Hoot (http://hrca.honda.com)
• The Honda Hoot, hosted by the Honda Riders Club of America, brings approximately 18,000 motorcycle enthusiasts to Knoxville each year, yielding an economic impact of $25 million.

Laconia Motorcycle Week (www.laconiamcweek.com)
• Laconia Motorcycle Week is held annually in June in Laconia, New Hampshire. Attendance is estimated between 100,000 and 400,000. Events include races, shows, and a motorcycle hill climb competition.

Lone Star Rally (www.lonestarrally.com)
• The Lone Star Rally, held each November in Galveston, Texas, features two dozen bands playing 50 free concerts, the Leather ‘n’ Lace Costume Ball, a Breast Cancer Awareness Ride, fashion shows, a tattoo contest, poker runs, and other events. The 2014 rally was attended by over 350,000 (excluding those who came for the concerts only).

National Bikers Roundup (www nbrkcmo.com)
• The National Bikers Roundup, held at various venues throughout the U.S. annually, is the largest gathering of black riders. The 37th annual event, which took place in August 2014 at Atlanta Motor Speedway, drew over 50,000 bikers.

Republic of Texas Biker Rally (www.rotrally.com)
• The Republic of Texas Biker Rally, held each June in Austin, attracts over 200,000 bikers.

Sturgis Motorcycle Rally (www.sturgismotorcyclerally.com)
• The Sturgis Motorcycle Rally has been held annually in Sturgis, South Dakota, since 1938. Attendance was estimated at 420,000 for the August 2014 event, with over 605,000 in the region from the weekend before and through the event. Activities included the annual Mount Rushmore Ride, several concerts, a beauty pageant, and a chopper raffle.

36.5 Market Resources
Motorcycle Dealers Industry Profile, First Research, July 2014.
(www.firstresearch.com/Industry-Research/Motorcycle-Dealers.html)
Motorcycle Industry Council, 2 Jenner Street, Suite 150, Irvine, CA 92618.
(949) 727-4211. (www.mic.org)

Motorcycle Sales Statistics
37.1 Overview

A January 2014 poll by Harris Interactive (www.harrisinteractive.com) found that 68% of adults went to the movies at least once in 2013. By gender and age demographic, those who went to a movie are as follows:

<table>
<thead>
<tr>
<th>Gender</th>
<th>At Least One Movie</th>
<th>&gt;10 Movies</th>
<th>Mean Number Attended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>66%</td>
<td>14%</td>
<td>4.1</td>
</tr>
<tr>
<td>Male:</td>
<td>70%</td>
<td>20%</td>
<td>5.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>At Least One Movie</th>
<th>&gt;10 Movies</th>
<th>Mean Number Attended</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-36:</td>
<td>83%</td>
<td>24%</td>
<td>6.3</td>
</tr>
<tr>
<td>37-to-48:</td>
<td>73%</td>
<td>21%</td>
<td>5.3</td>
</tr>
<tr>
<td>49-to-67:</td>
<td>59%</td>
<td>11%</td>
<td>3.6</td>
</tr>
<tr>
<td>68 and older:</td>
<td>44%</td>
<td>9%</td>
<td>3.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household</th>
<th>At Least One Movie</th>
<th>&gt;10 Movies</th>
<th>Mean Number Attended</th>
</tr>
</thead>
<tbody>
<tr>
<td>With children:</td>
<td>80%</td>
<td>20%</td>
<td>5.3</td>
</tr>
<tr>
<td>Without children:</td>
<td>62%</td>
<td>16%</td>
<td>4.5</td>
</tr>
</tbody>
</table>

Sixty-six percent of participants in the Harris Poll said they are going out to the movies less often than they did a few years ago.

The Survey of Public Participation in the Arts, published in 2013 by The National Endowment for the Arts (www.arts.gov), found the number of movie patrons slightly lower than the Harris Poll, assessing that 60% of adults went out to a movie in the prior 12 months.

37.2 Market Assessment

According to Theatrical Market Statistics 2013, published by the Motion Picture Association of America (MPAA, www.mpaa.org) and based on data from Rentrak Corp. (www.rentrak.com), the U.S. and Canadian box office market has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Gross</th>
<th>Attendance</th>
<th>Avg. Ticket Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>$ 9.2 billion</td>
<td>1.48 billion</td>
<td>$6.21</td>
</tr>
<tr>
<td>2005</td>
<td>$ 8.8 billion</td>
<td>1.38 billion</td>
<td>$6.41</td>
</tr>
<tr>
<td>2006</td>
<td>$ 9.2 billion</td>
<td>1.39 billion</td>
<td>$6.55</td>
</tr>
</tbody>
</table>
• 2007: $ 9.6 billion  1.40 billion  $6.88
• 2008: $ 9.6 billion  1.34 billion  $7.18
• 2009: $10.6 billion  1.42 billion  $7.50
• 2010: $10.6 billion  1.34 billion  $7.89
• 2011: $10.2 billion  1.28 billion  $7.93
• 2012: $10.8 billion  1.36 billion  $7.96
• 2013: $10.9 billion  1.34 billion  $8.13

According to the U.S. Census Bureau (www.census.gov), movie theater revenue is distributed as follows:
• Ticket sales: 66%
• Food and beverage: 29%
• Other: 5%

Based on this distribution, cinema revenue was approximately $16.5 billion in 2013.

There were 39,783 indoor screens operating in 6,039 indoor theaters in the U.S. at year-end 2013, according to IHS Screen Digest. Eighty-two percent (82%) of screens are located at venues with 8 or more screens. There were 14,483 digital 3-D screens.

### 37.3 Cinema Patrons

The following is the distribution of cinema ticket sales by moviegoer classification (source: MPAA):

<table>
<thead>
<tr>
<th>Clasification</th>
<th>Pct. of Population</th>
<th>Pct. of Tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequent (once a month or more)</td>
<td>11%</td>
<td>50%</td>
</tr>
<tr>
<td>Occasional (less than once a month)</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Infrequent (once a year)</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Non-moviegoers:</td>
<td>32%</td>
<td>0%</td>
</tr>
</tbody>
</table>

The following is a profile of frequent moviegoers (source: MPAA):

<table>
<thead>
<tr>
<th>Gender</th>
<th>% of Frequent</th>
<th>% of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>57%</td>
<td>51%</td>
</tr>
<tr>
<td>Male</td>
<td>43%</td>
<td>49%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>% of Frequent</th>
<th>% of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-to-11</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>12-to-17</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>18-to-24</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>25-to-39</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>40-to-49</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>50-to-59</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>60 and older</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Ethnicity

- African-American: 12%  
- Caucasian: 49%  
- Hispanic: 32%  
- Other: 7%

The percentage of frequent moviegoers in the most populous states is as follows:

- California: 20%  
- Texas: 17%  
- Michigan: 15%  
- Georgia: 14%  
- Illinois: 12%  
- Ohio: 12%  
- Virginia: 11%  
- Florida: 9%  
- New York: 8%  
- North Carolina: 7%  
- Pennsylvanian: 6%  
- Indiana: 5%  
- Other states: 11%

According to International Demographics (www.themediaaudit.com), approximately 36% of adults living in metropolitan areas visit movie theaters each month. The following metropolitan areas have the highest percentage of adults who do so:

- Ann Arbor, MI: 53.5%  
- San Francisco, CA: 48.3%  
- Salt Lake City, UT: 47.5%  
- Reno, NV: 47.4%  
- San Jose, CA: 47.1%  
- Phoenix, AZ: 47.2%  
- Spokane, WA: 47.1%  
- San Diego, CA: 45.7%  
- Nashville, TN: 44.1%  
- Dallas-Ft. Worth, TX: 43.1%

The following metropolitan areas have the lowest percentages of adults visiting movie theaters each month:

- Charlotte, NC: 15.0%  
- Greenville-Spartanburg, SC: 24.3%  
- Pittsburgh, PA: 25.5%  
- Louisville, KY: 25.8%
37.4 Event Cinema
With weekends accounting for 70% of movie ticket sales, some movie theaters are hoping to transform the cinema into a week-long entertainment venue with broadcasts of sports events and simulcasts of classical music performances, rock concerts, and other live events during the week. The installation of 3-D high definition technology expands the potential for airing such live events at theaters.

According to *IHS Screen Digest*, global spending for event features at cinemas was $380 million in 2013; spending is forecast to increase to $1 billion by 2018.

“Event cinema accounts for only around 1% of global box office, but it is growing quickly.”

*The Economist*, 11/30/13

National CineMedia regularly shows simulcasts of New York’s Metropolitan Opera in high definition at select U.S. theaters, frequently experiencing sellout audiences. Screenvision has broadcasted performances of the New York Philharmonic from Carnegie Hall.

National Amusements broadcasts select Red Sox games during baseball season in New England theaters – charging $10 admission for regular-season baseball games which are sold out at stadiums.

37.5 Dining At The Cinema
Hoping to woo adults back to the megaplex, several operators are building venues that offer some combination of reserved seating, alcoholic beverage service, and made-to-order dinners, all while projecting the latest films via state-of-the-art digital projection systems.

According to Patrick Corcoran, director of media and research for NATO, approximately 400 movie theaters nationwide serve alcoholic beverages. Theaters with food and beverage service typically derive about 50% of revenue from these sales.
37.6 Market Resources
Motion Picture Association of America, 1600 Eye Street NW, Washington, DC 20006. (202) 293-1966. (www.mpaa.org)

Rentrak Corporation, 7700 NE Ambassador Place, 3rd Floor, Portland, OR 97220. (503) 284-7581. (www.rentrak.com)
38.1 Overview

The Institute of Museum & Library Services (www.imls.gov) estimates that there are 17,500 museums in the United States. The Official Museum Directory (www.officialmuseumdirectory.com) provides information on 14,000 of these museums.

According to the American Alliance of Museums (AAM, www.aam-us.org), one-third of Americans say they have visited an art museum, a history museum, an aquarium, zoo, botanical garden, or science and technology center within the past six months. Almost a quarter have gone within the past year. There are 2.3 million museum visits per day, adding up to a total of 865 million visits per year.

Museums contribute $21 billion annually to the U.S. economy, according to AAM. A directory of museums accredited by AAM is available online at (www.aam-us.org/docs/default-source/accreditation/list-of-accredited-museums.pdf?sfvrsn=10).

The following are online directories of museums:

- http://museums.findthebest.com
- www.museumsusa.org
- www.touristinformationdirectory.com/united_states/museums.htm

38.2 Art Museums

Among various types of museums, art museums appeal to the widest range of people.

There are over 2,500 art museums in the United States. The following are online directories of art museums:

- www.artencyclopedia.com/museums-us.html
- www.museumsusa.org/museums

According to The Art Newspaper, the following U.S. art museums had the highest number of visitors in 2013:

- Metropolitan Museum of Art (New York, NY): 6,226,727
- National Gallery of Art (Washington, DC): 4,093,070
- Art Institute of Chicago (Chicago, IL): 1,539,716
- De Young Museum (San Francisco, CA): 1,344,112
<table>
<thead>
<tr>
<th>Museum Name</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles County Museum of Art (Los Angeles, CA)</td>
<td>1,202,654</td>
</tr>
<tr>
<td>Smithsonian American Art Museum (Washington, DC)</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Getty Center (Los Angeles, CA)</td>
<td>1,167,795</td>
</tr>
<tr>
<td>Museum of Fine Arts (Boston, MA)</td>
<td>1,134,289</td>
</tr>
<tr>
<td>Getty Center (Los Angeles, CA)</td>
<td>1,107,054</td>
</tr>
<tr>
<td>National Portrait Gallery (Washington, DC)</td>
<td>1,083,815</td>
</tr>
<tr>
<td>Museum of Fine Arts (Houston, TX)</td>
<td>850,995</td>
</tr>
<tr>
<td>San Francisco Museum of Modern Art (San Francisco, CA)</td>
<td>700,408</td>
</tr>
<tr>
<td>Philadelphia Museum of Art (Philadelphia, PA)</td>
<td>692,034</td>
</tr>
<tr>
<td>Seattle Art Museum (Seattle, WA)</td>
<td>689,582</td>
</tr>
<tr>
<td>Huntington Library (San Marino, CA)</td>
<td>660,640</td>
</tr>
<tr>
<td>Hirshhorn Museum (Washington, DC)</td>
<td>645,343</td>
</tr>
<tr>
<td>Freer and Sackler Galleries (Washington, DC)</td>
<td>613,090</td>
</tr>
<tr>
<td>Virginia Museum of Fine Arts (Richmond, VA)</td>
<td>609,637</td>
</tr>
<tr>
<td>Frederik Meijer Sculpture Park (Grand Rapids, MI)</td>
<td>578,020</td>
</tr>
</tbody>
</table>

The exhibitions with the highest attendance in 2013 were as follows (source: *The Art Newspaper*):

<table>
<thead>
<tr>
<th>Exhibition Name</th>
<th>Daily</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Turrell (Guggenheim Museum; New York, NY)</td>
<td>5,610</td>
<td>472,883</td>
</tr>
<tr>
<td>Edvard Munch: The Scream (Museum of Modern Art; New York, NY)</td>
<td>5,528</td>
<td>1,017,146</td>
</tr>
<tr>
<td>Impressionism, Fashion and Modernity (Metropolitan Museum of Art; New York, NY)</td>
<td>5,435</td>
<td>440,973</td>
</tr>
<tr>
<td>Claes Oldenburg: The Street and The Store (Museum of Modern Art; New York, NY)</td>
<td>5,181</td>
<td>590,630</td>
</tr>
<tr>
<td>Matisse: In Search of True Painting (Metropolitan Museum of Art; New York, NY)</td>
<td>5,077</td>
<td>468,568</td>
</tr>
<tr>
<td>Punk: Chaos to Couture (Metropolitan Museum of Art; New York, NY)</td>
<td>4,808</td>
<td>442,350</td>
</tr>
<tr>
<td>Picasso Black and White (Guggenheim Museum; New York, NY)</td>
<td>4,398</td>
<td>414,651</td>
</tr>
<tr>
<td>Henri Labrouste (Museum of Modern Art; New York, NY)</td>
<td>4,300</td>
<td>438,680</td>
</tr>
<tr>
<td>Le Corbusier (Museum of Modern Art; New York, NY)</td>
<td>4,010</td>
<td>405,000</td>
</tr>
<tr>
<td>Soundings: A Contemporary Score (Museum of Modern Art; New York, NY)</td>
<td>3,850</td>
<td>331,109</td>
</tr>
<tr>
<td>Gutai: Splendid Playground (Guggenheim Museum; New York, NY)</td>
<td>3,826</td>
<td>272,740</td>
</tr>
<tr>
<td>Inventing Abstraction, 1910-1925 (Museum of Modern Art; New York, NY)</td>
<td>3,800</td>
<td>425,577</td>
</tr>
<tr>
<td>Quay Brothers (Museum of Modern Art; New York, NY)</td>
<td>3,768</td>
<td>546,310</td>
</tr>
<tr>
<td>Alina Szapocznikow (Museum of Modern Art; New York, NY)</td>
<td>3,659</td>
<td>402,507</td>
</tr>
<tr>
<td>Ellsworth Kelly: Chatham Series (Museum of Modern Art; New York, NY)</td>
<td>3,573</td>
<td>389,502</td>
</tr>
<tr>
<td>Picasso and Chicago (Art Institute; Chicago, IL)</td>
<td>3,404</td>
<td>292,715</td>
</tr>
<tr>
<td>New Photography 2012 (Museum of Modern Art; New York, NY)</td>
<td>3,261</td>
<td>394,592</td>
</tr>
</tbody>
</table>
• Dieter Roth (Museum of Modern Art; New York, NY): 3,189 421,011
• Nam June Paik: Global Visionary (SAAM/Berwick; Washington, DC): 3,145 758,000

38.3 Children's Museums

The Association of Children’s Museums (ACM, www.childrensmuseums.org) estimates the total number of children’s museums in the United States at between 250 to 300. More than 200 are ACM members. In recent years, over 33 million families have visited ACM member children’s museums.

More than 25 new children’s museums have opened in the United States since 2000, continuing a building boom that began in the 1980s. Large-scale children’s museums are in the works in Washington, D.C., and Philadelphia. Children’s museums in Boston and Chicago have plans for major expansions.

Parents ranks U.S. children’s museums as follows:

1. Children’s Museum of Indianapolis (Indianapolis, IN; www.childrensmuseum.org)
2. Children’s Museum of Houston (Houston, TX; www.cmhouston.org)
3. (tie) Discovery Center (Rockford, IL; www.discoverycentermuseum.org)
3. (tie) Port Discovery (Baltimore, MD; www.portdiscovery.org)
3. (tie) Boston Children’s Museum (Boston, MA; www.bostonchildrensmuseum.org)
6. Brooklyn Children’s Museum (Brooklyn, NY; www.brooklynkids.org)
8. Minnesota Children’s Museum (Saint Paul, MN; www.mcm.org)
9. Children’s Discovery Museum of San Jose (San Jose, CA; www.cdm.org)
10. Madison Children’s Museum (Madison, WI; www.madisonchildrensmuseum.org)
11. Children’s Museum of Richmond (Richmond, VA; www.c-mor.org)
12. Children’s Museum at Holyoke (Holyoke, MA; www.childrensmuseumholyoke.org)
13. Creative Discovery Museum (Chattanooga, TN; www.cdmfun.org)
15. Exploration Station (Bourbonnais, IL; www.exploration-station.org)
16. Garden State Discovery Museum (Cherry Hill, NJ; www.discoverymuseum.com)
17. A.C. Gilbert’s Discovery Village (Salem, OR; www.acgilbert.org)
18. Lincoln Children’s Museum (Lincoln, NE; www.lincolnchildrensmuseum.org)
19. Providence Children’s Museum (Providence, RI; www.childrensmuseum.org)
20. Children’s Discovery Museum of the Desert (Rancho Mirage, CA; www.cdmod.org)
22. Children’s Museum at Yunker Farm (Fargo, ND; www.childrensmuseum-yucker.org)
23. Children’s Museum of Illinois (Decatur, IL; www.cmofil.org)
25. Magic House (St. Louis, MO; www.magichouse.org)
26. Pittsburgh Children’s Museum (Pittsburgh, PA; https://pittsburghkids.org)
27. Children’s Museum of Southeastern Connecticut (Niantic, CT; www.childrensmuseumsect.org)
28. Exploration Place (Wichita, KS; www.exploration.org)
29. Children’s Museum of Denver (Denver, CO; www.mychildsmuseum.org)
30. Chicago Children’s Museum (Chicago, IL; www.chicagochildrensmuseum.org)
31. Arkansas Museum of Discovery (Little Rock, AR; www.museumofdiscovery.org)
32. Staten Island Children’s Museum (Staten Island, NY; www.sichildrensmuseum.org)
33. Children’s Museum of Manhattan (New York, NY; www.cmom.org)
34. Discovery Children’s Museum (Las Vegas, NV; www.discoverykidslv.org)
35. Greensboro Children’s Museum (Greensboro, NC; www.gcmuseum.org)
36. The Discovery Museums (Acton, MA; www.discoverymuseums.org)
37. Hands On! Regional Museum (Johnson City, TN; www.handsonmuseum.org)
38. Betty Brinn Children’s Museum (Milwaukee, WI; www.bbcmkids.org)
39. Lynn Meadows Discovery Center (Gulfport, MS; www.lmdc.org)
40. Treehouse Museum (Ogden, UT; www.treehousemuseum.org)
41. WOW! Children’s Museum: World of Wonder (Lafayette, CO; www.wowchildrensmuseum.org)
42. Virginia Discovery Museum (Charlottesville, VA; www.vadm.org)
43. Fort Worth Museum of Science and History (Fort Worth, TX; www.fwmuseum.org)
44. Discovery Depot (Galesburg, IL; www.discoverydepot.org)
45. EarlyWorks Museum Complex (Huntsville, AL; www.earlyworks.com)
46. Explorium of Lexington (Lexington, KY; www.explorium.com)
47. Please Touch Museum (Philadelphia, PA; www.pleasetouchmuseum.org)
48. Stepping Stones Museum for Children (Norwalk, CT; www.steppingstonesmuseum.org)
49. Wonderscope Children’s Museum of Kansas City (Shawnee, KS; www.wonderscope.org)

With 1.2 million visitors each year, the Children’s Museum of Indianapolis is the most-visited children’s museum in the U.S.

38.4 History Museums

There are over 7,000 history museums in the United States. Each state has a history museum, and most cities and towns have some type of museum that recognizes local history.

The following are online directories of history museums:
• http://museums.findthebest.com/d/a/History
• www.censusfinder.com/guide_to_historical_museums.htm
• www.museumsusa.org/museums/
• www.thehistorylist.com
The preservation of houses and structures relevant to their founding and
development are an important way that cities and towns can let residents and visitors
learn about local history. There are some 3,000 historic house museums across the
United States. The following links to a list of historic house museums:

Many early American villages and communities across the U.S. have been
preserved or reconstructed. Some offer reenactments of life as it existed when the
communities were active.

Living history farms demonstrate agricultural practices dating from colonial times
to the early 20th century. They typically offer demonstrations and many offer interaction
with farm animals.

The following links to a list of living history museums:
www.rkma.com/LivingHistoryMuseums.pdf

38.5 Market Resources
American Alliance of Museums, 1575 Eye Street NW, Suite 400, Washington, DC
20005. (202) 289-1818. (www.aam-us.org)

Association of Art Museum Directors, 120 East 56th Street, Suite 520, New York, NY
10022. (212) 754-8084. (www.aamd.org)

Association of Children’s Museums, 2711 Jefferson Davis Highway, Suite 600,
Arlington, VA 22202. (703) 224-3100. (www.childrensmuseums.org)
39

MUSIC CONCERTS & FESTIVALS

39.1 Market Assessment

According to Pollstar (www.pollstar.com), the North American concert business hit a record high in 2013 of $5.1 billion. Gross sales for the Top 100 Tours in North America were $2.79 billion, a 10.3% increase over 2012 and a record high. The total number of tickets sold by the Top 100 was up 9.2% to 40.07 million. The average ticket price was $69.52, up 1.1%.

39.2 Concert Attendance

According to International Demographics (www.themediaaudit.com), approximately 20% of adults attend at least one concert annually. By metropolitan area, the following are the percentages of adults who, on average, attend at least one pop or rock music concert each year:

- Akron, OH: 19.6%
- Albany-Schenectady-Troy, NY: 28.4%
- Albuquerque, NM: 19.4%
- Allentown-Bethlehem, PA: 18.7%
- Ann Arbor, MI: 24.8%
- Atlanta, GA: 18.4%
- Austin, TX: 23.1%
- Baltimore, MD: 18.4%
- Birmingham, AL: 16.5%
- Boise, ID: 18.8%
- Boston, MA: 22.7%
- Buffalo, NY: 27.4%
- Charleston, SC: 19.3%
- Charlotte, NC: 25.2%
- Chicago, IL: 21.6%
- Cincinnati, OH: 14.7%
- Cleveland, OH: 20.5%
- Colorado Springs, CO: 11.7%
- Columbia, SC: 12.8%
- Columbia-Jefferson City, MO: 20.4%
- Columbus, OH: 19.8%
• Dallas-Ft. Worth, TX: 18.1%
• Dayton, OH: 14.7%
• Denver, CO: 23.6%
• Detroit, MI: 22.0%
• Eugene-Springfield, OR: 22.0%
• Ft. Myers-Naples, FL: 17.0%
• Grand Rapids, MI: 16.7%
• Greensboro, NC: 19.5%
• Greenville-Spartanburg, SC: 17.8%
• Houston, TX: 17.1%
• Indianapolis, IN: 22.2%
• Jacksonville, FL: 22.0%
• Kansas City, MO: 18.7%
• Las Vegas, NV: 22.7%
• Lexington, KY: 16.0%
• Little Rock, AR: 18.1%
• Los Angeles, CA: 18.3%
• Louisville, KY: 19.3%
• Madison, WI: 20.9%
• Melbourne-Titusville-Cocoa, FL: 12.8%
• Memphis, TN: 17.8%
• Miami-Ft. Lauderdale, FL: 17.7%
• Milwaukee-Racine, WI: 21.8%
• Minneapolis-Saint Paul, MN: 18.2%
• Nashville, TN: 25.0%
• New Orleans, LA: 23.7%
• New York, NY: 20.5%
• Norfolk-Virginia Beach-Newport News, VA: 18.0%
• Ocala, FL: 8.3%
• Oklahoma City, OK: 15.8%
• Omaha-Council Bluffs, NE: 26.3%
• Orange County, CA: 19.2%
• Orlando, FL: 18.0%
• Peoria, IL: 18.3%
• Philadelphia, PA: 19.6%
• Phoenix, AZ: 18.0%
• Pittsburgh, PA: 16.1%
• Portland, OR: 24.4%
• Raleigh-Durham, NC: 21.0%
• Reno, NV: 26.1%
• Riverside-San Bernardino, CA: 20.0%
• Rochester, NY: 16.6%
• Sacramento, CA: 19.3%
• Salt Lake City, UT: 25.8%
• San Antonio, TX: 17.9%
• San Diego, CA: 20.6%
• San Francisco, CA: 21.3%
• San Jose, CA: 16.9%
• Seattle-Tacoma, WA: 23.8%
• Southern New Hampshire: 25.2%
• Spokane, WA: 18.4%
• St. Louis, MO: 19.1%
• Syracuse, NY: 22.2%
• Tampa-St. Petersburg, FL: 22.3%
• Toledo, OH: 14.6%
• Tucson, AZ: 18.0%
• Tulsa, OK: 21.6%
• Washington, DC: 17.5%
• West Palm Beach, FL: 15.6%

39.3 Top Grossing Concert Tours

The following were the top tours in North America in 2013 (source: Pollstar):

<table>
<thead>
<tr>
<th>Cities</th>
<th>Shows</th>
<th>Gross</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taylor Swift:</td>
<td>47</td>
<td>$112.7 million</td>
</tr>
<tr>
<td>Bon Jovi:</td>
<td>58</td>
<td>$107.3 million</td>
</tr>
<tr>
<td>Kenny Chesney:</td>
<td>41</td>
<td>$90.9 million</td>
</tr>
<tr>
<td>The Rolling Stones:</td>
<td>11</td>
<td>$87.7 million</td>
</tr>
<tr>
<td>Beyoncé:</td>
<td>42</td>
<td>$76.4 million</td>
</tr>
<tr>
<td>Jay Z/Justin Timberlake:</td>
<td>12</td>
<td>$69.0 million</td>
</tr>
<tr>
<td>Fleetwood Mac:</td>
<td>46</td>
<td>$66.7 million</td>
</tr>
<tr>
<td>Pink:</td>
<td>51</td>
<td>$62.9 million</td>
</tr>
<tr>
<td>Eagles:</td>
<td>42</td>
<td>$59.7 million</td>
</tr>
<tr>
<td>Justin Bieber:</td>
<td>42</td>
<td>$55.9 million</td>
</tr>
<tr>
<td>Jason Aldean:</td>
<td>64</td>
<td>$51.0 million</td>
</tr>
<tr>
<td>Paul McCartney:</td>
<td>13</td>
<td>$49.6 million</td>
</tr>
<tr>
<td>Cirque du Soleil’s Totem:</td>
<td>45</td>
<td>$49.1 million</td>
</tr>
<tr>
<td>Trans-Siberian Orchestra:</td>
<td>67</td>
<td>$47.9 million</td>
</tr>
<tr>
<td>Luke Bryan:</td>
<td>72</td>
<td>$44.4 million</td>
</tr>
<tr>
<td>Cirque du Soleil’s Amaluna:</td>
<td>4</td>
<td>$43.8 million</td>
</tr>
<tr>
<td>One Direction:</td>
<td>32</td>
<td>$43.3 million</td>
</tr>
<tr>
<td>Zac Brown Band:</td>
<td>64</td>
<td>$43.1 million</td>
</tr>
<tr>
<td>Bruno Mars:</td>
<td>42</td>
<td>$43.0 million</td>
</tr>
<tr>
<td>Elton John:</td>
<td>32</td>
<td>$41.0 million</td>
</tr>
</tbody>
</table>
39.4 Music Festivals

Music festivals are concerts featuring several stages with a variety of artists and typically lasting over several days. Reminiscent of Woodstock, these destination events are among the most successful music concerts these days. Nearly 700 music festivals are held across the U.S. each year.

The following are the largest annual music festivals held in the United States:

**Austin City Limits Music Festival** ([www.aclfestival.com](http://www.aclfestival.com))
- The three-day Austin City Limits Music Festival, named after the legendary PBS concert series, has been held at Zilker Park in Austin since 2002. The ACL Music Festival features more than 130 acts performing on eight stages. Typically, over 70,000 fans attend the festival each day.

**Bonnaroo Music Festival** ([www.bonnaroo.com](http://www.bonnaroo.com))
- Bonnaroo Music Festival, held at Great Stage Park on a 700-acre farm in Manchester, Tennessee (near Nashville), has been the highest grossing music festival each year since 2003. First held in 2002, the annual 4-day music festival generates an estimated $20 million for the local economy. The estimated annual gross of $30 million includes approximately $18 million in ticket sales; general admission tickets are priced at $250. Among Bonnaroo’s other revenue sources are concessions, merchandise, onsite RV rentals, and paid showers. The festival typically features around 100 bands and attracts 80,000 fans.

**Coachella Valley Music and Arts Festival** ([www.coachella.com](http://www.coachella.com))
- The Coachella Valley Music and Arts Festival, commonly known as Coachella, has been held annually at the Empire Polo Club in Indio, California, since 1999. Coachella features rock, indie, hip hop, and electronic music as well as large sculptural art. Coachella draws an estimated 75,000 people each of its three days, or an estimated average aggregate of 225,000 attendees. Some 20,000 people camp in tents at a campground site adjacent to the venue grounds.

**Essence Music Festival** ([www.essence.com/festival](http://www.essence.com/festival))
- Held annually since 1995, Essence Music Festival is a three-day celebration of R&B and gospel music with concerts and lounge parties held throughout New Orleans. It is the largest event celebrating African-American culture and music in the United States, and the largest event held in New Orleans. The festival also offers panel discussions focusing on health and family, career and finances, and education and technology. More than 500,000 festival-goers generate nearly $250 million in economic impact for New Orleans.

**Lollapalooza** ([www.lollapalooza.com](http://www.lollapalooza.com))
- Held in Chicago since 1991, Lollapalooza features alternative rock, heavy metal, punk rock, and hip hop bands. C3 Presents, the event promoters, pays the City of Chicago $1 million annually for use of Grant Park, where Lollapalooza is held. More than 125 bands perform for 300,000 attendees.
New Orleans Jazz and Heritage Festival (www.nojazzfest.com)
- The New Orleans Jazz & Heritage Festival, commonly referred to as Jazz Fest and held since 1970, is an annual celebration of the music and culture of New Orleans. Total attendance is typically 650,000, with single-day attendance at up to 160,000. According to the sponsors, the music encompasses every style associated with the city and the state: jazz, blues, R&B, gospel music, Cajun music, zydeco, Afro-Caribbean, folk music, Latin, rock, rap music, country music, bluegrass, and everything in between. Jazz Fest is held at the Fair Grounds Race Course on the last weekend in April and the first weekend in May. Performances are held at numerous unaffiliated New Orleans nightclubs during the festival’s scheduled two-week period. The economic impact of Jazz Fest is estimated at $300 million, a figure that dwarfs other mega-festivals in terms of economic impact for the host city.

Summerfest (www.summerfest.com)
- Summerfest, referred to as The Big Gig, attracts between 800,000 and 1,000,000 people each year and is the world’s largest music festival according to the Guinness World Records. The 11-day event is held at the Henry Maier Festival Park in Milwaukee. Headline acts perform at the Marcus Amphitheater. The first event was held in 1968.

Ultra Music Festival (www.ultramusicfestival.com)
- Ultra Music Festival, held since 2005, is the largest electronic music festival in the world and one of the highest grossing music festivals. The three-day event is held in Miami. More than 165,000 people attend Ultra.

Virgin Mobile FreeFest (www.virginmobilefestival.com)
- The Virgin Mobile Festival, launched in 2007, is a spinoff from the V Festivals held in the U.K. and Australia. Sponsored by Virgin Mobile, the festival is free. The festival rotates between venues in the U.S. and Canada. The Virgin Mobile youth homelessness initiative is the focus of The RE*Generation project, the pro-social effort by Virgin Mobile USA dedicated to raising awareness of the plight of at-risk and homeless youth. Since 2009, FreeFests have raised more than $800,000 and nearly 75,000 volunteers have pledged their time and effort to the cause.

Voodoo Experience (www.thevoodooexperience.com)
- The Voodoo Experience, commonly referred to as Voodoo, has hosted over 500 artists and has had a cumulative attendance of over one million during its 13-year tenure. Launched in 1999, the festival is held in New Orleans on Halloween weekend or the weekend before Halloween. The Voodoo Experience is known for its blending of high profile national artists from all genres and has been twice nominated for Pollstar’s Music Festival of the Year. For its 15th anniversary, the festival will be held at City Park’s Festival Grounds, a new permanent home for Voodoo. Voodoo Music Experience attracts over 100,000.
Winter Music Conference ([www.wintermusicconference.com](http://www.wintermusicconference.com))

- Held each March in South Florida since the 1985, the Winter Music Conference is a weeklong electronic music conference aimed at professionals such as DJs, A&R, producers, promoters, and media. Awards, seminars, panel discussions, exhibits, workshops, listening sessions, and more are included in the conference in addition to concerts and live entertainment. More than 100,000 participants from 70 countries attend the conference, with over 500 events held throughout Miami and Miami Beach and more than 2,300 artists and DJs performing.

39.5 Market Resources

*Billboard*, 5055 Wilshire Boulevard, Los Angeles, CA 90036. (323) 525-2300. ([www.billboard.com](http://www.billboard.com))

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. ([www.themediaaudit.com](http://www.themediaaudit.com))

Pollstar USA, 4697 West Jacquelyn Avenue, Fresno, CA 93722. (559) 271-7900. ([www.pollstar.com](http://www.pollstar.com))
40.1 Participation
According to Survey of Public Participation in the Arts, published by The National Endowment for the Arts (www.arts.gov), 28 million adults (12% of the adult population) played a musical instrument in 2013. Twenty-one million, or 9% of adults, sing, either alone or with others.

40.2 Amateur Musicians
According to the National Association of Music Merchants (NAMM, www.namm.com), there are 62 million amateur musicians in the U.S. The most popular instruments, based on percentage of players, are as follows:
• Piano: 34%
• Guitar: 22%
• Drums: 6%
• Flute: 5%
• Clarinet: 4%
• Saxophone: 4%
• Keyboard: 4%
• Trumpet: 3%
• Violin: 2%

Of these musicians, 52% are female and 48% are male. The following are other findings from the NAMM survey:
• Of the female players, 50% play piano and 8% play guitar.
• Of the male players, 36% play guitar and 17% play piano.
• The guitar is most likely to be played by someone 18 to 34 years of age.
• Ownership of a musical instrument is highest in the western region of the U.S., followed by the Northeast, North Central, and then South Central.
• Musical instrument ownership is more common in upper income households than in lower income households.
• Of those who don't play actively, 50% still own their instrument, and 18% would start playing again if they had more time.

The 12-to-24 age demographic represents the largest single group of amateur
musicians. This has led to increased demand for musical instruments and accessories not only for use at home, but also within the school system.

40.3 Music Retail Sector
According to Musical Instrument Stores Industry Profile, published by First Research (www.firstresearch.com), consumers spend approximately $4 billion annually at music stores.

There are approximately 4,000 music stores in the U.S. The industry is fragmented: the 50 largest companies account for about 45% of revenue. Major companies include Guitar Center (www.guitarcenter.com), with 265 U.S. stores, and Sam Ash Music (www.samash.com), with 45 U.S. locations.

40.4 Market Resources

National Association of Music Merchants, 5790 Armada Drive, Carlsbad, CA 92008. (760) 438-8001. (www.namm.com)
41

NIGHTLIFE

41.1 Market Assessment

According to International Demographics (www.themediaaudit.com), 25.7% of adults residing in large cities visit a bar or nightclub at least once a month. The cities with the highest percentage of adults who frequently visit bars or nightclubs are as follows:

- Madison, WI: 38.2%
- Minneapolis-Saint Paul, MN: 32.6%
- Cleveland, OH: 32.2%
- Omaha, NE: 31.7%
- St. Louis, MO: 31.5%
- Milwaukee, WI: 31.5%
- Cincinnati, OH: 31.4%
- Denver, CO: 31.4%
- Reno, NV: 31.2%
- Buffalo, NY: 31.1%

According to First Research (www.firstresearch.com), the U.S. bar and nightclub industry includes about 45,000 establishments (single-location companies and branches of multi-location companies) with combined annual revenue of about $20 billion. No major companies dominate; many state liquor laws do not allow large chains. The industry is highly fragmented: the 50 largest companies account for only about 5% of revenue.

The National Restaurant Association (www.restaurant.org) estimates 2014 sales at bars and taverns at $19.9 billion, a 2.9% increase over 2013.

41.2 Bars & Night Clubs

Nightclub and Bar Magazine annually ranks the top clubs in the United States by estimated revenue. The 2014 list is as follows (based on 2013 revenue):

- XS Nightclub (Las Vegas, NV; www.xslasvegas.com): $90-$95 million
- Marquee Nightclub & Dayclub (Las Vegas, NV; www.marqueelasvegas.com): $85-$90 million
- TAO LV (Las Vegas, NV; www.taolasvegas.com): $50-$55 million
- Surrender Nightclub (Las Vegas, NV; www.surrendernighclub.com): $45-$50 million
• LIV (Miami Beach, FL; www.livnightclub.com): $40-$45 million
• Pure Nightclub (Las Vegas, NV; www.purethenightclub.com): $30-$35 million
• LAVO NY (New York, NY; www.lavony.com): $30-$35 million
• Story (Miami, FL; www.story.wantickents.com): $25-$30 million
• LAVO LV (Las Vegas, NV; www.lavolv.com): $25-$30 million
• Hyde Bellagio (Las Vegas, NV; www.hydebellagio.com): $25-$30 million
• HAZE (Las Vegas, NV; www.lightgroup.com): $25-$30 million
• Mango’s Tropical Cafe (Miami Beach, FL; www.mangostropicalcafe.com): $20-$25 million
• Tryst Nightclub Las Vegas, NV; www.trystlasvegas.com): $20-$25 million
• 1 Oak Las Vegas (Las Vegas, NV; www.1oaklasvegas.com): $20-$25 million
• echostage (Washington, DC; www.echostage.com): $20-$25 million
• The Pool After Dark (Atlantic City, NJ; www.caesars.com/poolafterdark): $20-$25 million
• Seacrets (Ocean City, MD; www.seacrets.com): $20-$25 million
• 1 Oak NYC (New York, NY; www.1oaknyc.com): $20-$25 million
• Greystone Manor (West Hollywood, CA; www.greystonemanorla.com): $15-$20 million
• Emerson Theatre (Los Angeles, CA; www.emersontheatre.com): $15-$20 million
• Marquee NY (New York, NY; www.marqueeny.com): $15-$20 million
• Avalon Hollywood (Los Angeles, CA; www.avalonhollywood.com): $15-$20 million
• PHD (New York, NY; www.phdounge.com): $15-$20 million
• The Chandelier Bar (Las Vegas, NV; www.cosmopolitanlasvegas.com): $10-$15 million
• The Bank Nightclub (Las Vegas, NV; www.lightgroup.com): $10-$15 million
• LAX Nightclub (Las Vegas, NV; www.laxthenightclub.com): $10-$15 million
• Cleveland (Miami Beach, FL; www.clevelander.com): $10-$15 million
• Plush (Dallas, TX; www.plushdallas.com): $10-$15 million
• ROOF (Chicago, IL; www.roofonthewit.com): $10-$15 million
• FLUXX (San Diego, CA; www.fluxxsd.com): $10-$15 million
• Opera Nightclub (Atlanta, GA; www.operatlanta.com): $10-$15 million
• Castle Nightclub [Excalibur] (Chicago, IL; www.castlechicago.com): $10-$15 million
• The Park at Fourteenth (Washington, DC; www.park14.com): $10-$15 million
• Webster Hall (New York, NY; www.websterhall.com): $10-$15 million
• SET Nightclub (Miami Beach, FL; www.setmiami.com): $10-$15 million
• LURE (Los Angeles, CA; www.lurehollywood.com): $10-$15 million
• Altitude Sky Lounge (San Diego, CA; www.altitudeskylounge.com): $10-$15 million
• 1015 Folsom (San Francisco, CA; www.1015.com): $10-$15 million
• Beta Nightclub (Denver, CO; www.betanightclub.com): $10-$15 million
• LEVU (Dallas, TX; www.levudallas.com): $10-$15 million
• Chateau Nightclub & Gardens (Las Vegas, NV; www.chateaunights.com): $10-$15 million
• Sevilla Nightclub (Long Beach, CA; www.sevillanightclub.com): $10-$25 million
- Mansion (Miami Beach, FL; www.mansionmiami.com): $10-$15 million
- Stingaree (San Diego, CA; www.stingsandiego.com): $10-$15 million
- 207 (San Diego, CA; www.207sd.com): $10-$15 million
- Float (San Diego, CA; www.207sd.com): $10-$15 million
- ghOstbar (Las Vegas, NV; www.n9negroup.com): $15-$25 million
- Billy Bob’s Texas (Fort Worth, TX; www.billybobstexas.com): $10-$15 million
- Stone Rose (New York, NY; www.gerberbars.com): $10-$15 million
- Draí’s Hollywood (Los Angeles, CA; www.hollywood.drais.net): $10-$15 million
- Thrive (Dallas, TX; www.thrivedallas.com): $10-$15 million
- Club Space (Miami, FL; www.clubspace.com): $10-$15 million
- Avenue NYC (New York, NY; www.avenue-newyork.com): $10-$15 million
- Avenu Lounge (Dallas, TX; www.avenulounge.com): $10-$15 million
- Playhouse Nightclub (Los Angeles, CA; www.playhousenightclub.com): $5-$10 million
- AJ’s Club Bimini (Destin, FL; www.ajs-destin.com): $5-$10 million
- P.O.V (Washington, DC; www.pointofviewdc.com): $5-$10 million
- MOON (Las Vegas, NV; www.n9negroup.com): $5-$10 million
- Exchange LA (Los Angeles, CA; www.exchangela.com): $5-$10 million
- HQ Nightclub (New York, NY; www.revelnightlife.com): $5-$10 million
- Foundation (Seattle, WA; www.foundation-nightclub.com): $5-$10 million
- Bar Anticipation (Lake Como, NJ; www.bar-a.com): $5-$10 million
- 9:30 Club (Washington, DC; www.930.com): $5-$10 million
- Sutra OC (Costa Mesa, CA; www.sutraoc.com): $5-$10 million
- Public House (Chicago, IL; www.publichousechicago.com): $5-$10 million
- Maya Day + Nightclub (Scottsdale, AZ; www.shrinemgmfoxwoods.com): $5-$10 million
- Bassmnt SD (San Diego, CA; www.bassmntsd.com): $5-$10 million
- Shrine Nightclub (Mashantucket, CT; www.shrinemgmfoxwoods.com): $5-$10 million
- The Stage (Miami, FL; www.thestagemiami.com): $5-$10 million
- Draí’s Afterhours LV (Las Vegas, NV; www.draisafterhours.com): $5-$10 million
- Dream Nightclub (Miami Beach, FL; www.dreammia.com): $5-$10 million
- Passion Nightclub (Hollywood, FL; www.passionnightclub.com): $5-$10 million
- Create Nightclub (Los Angeles, CA; www.createnightclub.com): $5-$10 million
- Cielo (New York, NY; www.cieloclub.com): $5-$10 million
- Fur Nightclub (Washington, DC; www.furnightclub.com): $5-$10 million
- Lagasse’s Stadium (Las Vegas, NV; www.palazzo.com): $5-$10 million
- Body English (Las Vegas, NV; www.bodyenglish.com): $5-$10 million
- U Street Music Hall (Washington, DC; www.ustreetmusichall.com): $5-$10 million
- Output (Brooklyn, NY; www.output.com): $5-$10 million
- Baja Sharkeez (Hermosa Beach, CA; www.sharkeez.net): $5-$10 million
- Wall Lounge (Miami Beach, FL; www.wallmiami.com): $5-$10 million
- Empire (Boston, MA; www.empireboston.com): $5-$10 million
• Panama Joe’s (Long Beach, CA; www.sharkeez.net): $5-$10 million
• AV Nightclub (West Hollywood, CA; www.avnightclub.com): $5-$10 million
• Gold Boutique Nightclub (Las Vegas, NV; www.lightgroup.com): $5-$10 million
• The Colony (Los Angeles, CA; www.thecolonyla.com): $5-$10 million
• Club 152 (Memphis, TN; www.club152memphis.com): $5-$10 million
• Havana Club (Atlanta, GA; www.havanaclubatl.com): $5-$10 million
• Sandbar Mexican Restaurant & Tequila Bar (Santa Barbara, CA; www.sandbarsb.com): $5-$10 million
• Temple Nightclub (San Francisco, CA; www.templessf.com): $5-$10 million
• Lily Bar & Lounge (Las Vegas, NV; www.lightgroup.com): $5-$10 million
• LOVE (Washington, DC; www.lovetheclub.com): $5-$10 million
• Stoney’s Rockin’ Country (Las Vegas, NV; www.stoneysrockincountry.com): $5-$10 million
• Lima Lounge (Washington, DC; www.limaloungedc.com): $5-$10 million
• G Lounge (New York, NY; www.glounge.com): $5-$10 million
• Sound Nightclub (Hollywood, CA; www.soundnightclub.com): $5-$10 million
• element (New York, NY; www.elementny.com): $5-$10 million

41.3 Comedy Clubs
According to Scarborough Research (www.scarborough.com), 6% of adults visit a comedy club each year.
A recent survey by Experian Simmons (www.experian.com) ranked the top cities for residents with an appreciation for comedy as follows:
• Austin, TX
• New Orleans, LA
• Waco, TX
• Atlanta, GA
• Baton Rouge, LA
• Chicago, IL
• Milwaukee, WI
• Detroit, MI
• Philadelphia, PA
• Tallahassee, FL

The following is a list of prominent comedy clubs in the U.S.: www.rkma.com/leisure.ComedyClubs.pdf.

41.4 Jazz Clubs
According to a study by the Princeton University Center for Arts and Cultural Studies (www.princeton.edu/culturalpolicy/), 10.8 million people visit a jazz club or hear a jazz performance at least once a year.
Arts America (www.artsamerica.org) rates the following as the best U.S. cities for jazz clubs:
• Boston, MA
• Chicago, IL
• Los Angeles, CA
• New Orleans, LA
• New York, NY
• San Francisco, CA
• Seattle, WA
• Washington, DC

The following is a list of prominent jazz clubs in the U.S.: www.rkma.com/leisure.JazzClubs.pdf.

*Downbeat* publishes an annual list of 150 Great Jazz Venues. The 2013 list is available at www.downbeat.com/default.asp?sect=spc1303jvg.

### 41.5 Market Resources
42.1 Overview

According to Outdoor Recreation Participation Topline Report 2014, published by the Outdoor Industry Association (www.outdoorindustry.org), 49% of Americans ages six and older (142.6 million people) engaged in outdoor recreation in 2013.

Outdoor leisure and recreation includes a wide range of activities, several categories of which are assessed throughout this handbook, as follows:

- Bicycling. Chapter 6
- Boating. Chapter 7
- Fishing. Chapter 23
- Gardening. Chapter 26
- Golf. Chapter 28
- Hiking. Chapter 60
- Hunting & Shooting Sports. Chapter 30
- Motorcycling. Chapter 36
- Running. Chapter 48
- Tennis. Chapter 58
- Walking. Chapter 61
- Wildlife Watching Chapter 62

The following outdoor activities are assessed in this chapter:

- Camping
- Gold prospecting
- Kiteflying
- Mountaineering
- Paddling sports
- Skydiving
- Treasure hunting
- Ultimate frisbee

42.2 Camping

According to the U.S. Travel Association (USTA, www.ustravel.org), one third of U.S. adults say they have gone on a camping trip in the past five years. Camping vacationers tend to be married with children at home. The average age of travelers who go camping is 37, and their median household income is $43,000. People who go camping also tend to enjoy hiking, biking, and canoeing. Fifty-nine percent (59%) of campers said they traveled with their spouse on their most recent outdoor vacation, and nearly half traveled with their children.

Including equipment, travel, and all related expenditures, outdoor camping is a $5 billion annual business in the United States.

Among those who camp, recreational vehicle (RV) camping is most popular. According to the Recreation Vehicle Industry Association (RVIA, www.rvia.org), there are nearly 30 million RV enthusiasts in the U.S., including renters, with over 9 million RVs on the road. Nearly one in 10 U.S. households own at least one RV.

According to the National Association of RV Parks & Campgrounds (ARVC, www.arvc.org), nearly 23 million adults, about 10% of the total population, have taken an overnight trip to a campground or RV park/resort within the past two years.

According to Trailblaze.com, there are over 17,000 campgrounds in the U.S. The following links to a list of the most popular campgrounds in the U.S.: www.rkma.com/leisure.campgrounds.pdf.

42.3 Gold Prospecting

An estimated two million people have panned for gold in the U.S., mostly at commercial sites.

Gold Prospectors Association of America (GPAA, www.goldprospectors.org), the largest prospecting organization in the U.S., has approximately 100,000 members and over 40 local chapters.

The number of amateur prospectors in California is in the tens of thousands, and many look for gold from near the Oregon border to the Mother Lode near Yosemite to the deserts in the southern regions of the state.

“More than 150 years after the great Gold Rush, that propelled California’s development, the prospect of striking it rich prospecting for gold remains very much alive.”

USA Today

A streak of gold mines and gold prospecting sites extend from near Montgomery, Alabama, to Washington, D.C. North Carolina, South Carolina, Georgia, and Virginia have many gold mines and prospecting sites.

### 42.4 Kiteflying

The American Kitefliers Association (AKA, www.kite.org) estimates that about 100,000 people engage in kiteflying as a leisure activity.

“Harnessing the wind is not only fun, but it also provides a healthy opportunity to enjoy the outdoors.”

John Barresi, President
American Kitefliers Association
USA Today, 3/22/13

According to AKA President John Barresi, the following are the best locales for kiteflying:
- Berkeley, CA - Cesar Chavez Park
- Clearwater, FL
- Cleveland, OH - Lake Erie beaches
- Grand Haven State Park (Grand Haven, MI)
- Long Beach Peninsula, WA
- Ocean City, MD - beach
- Santa Monica, CA - beaches
- South Padre Island, TX
- Wildwood, NJ - beaches
- Wright Brothers National Memorial (Kill Devil Hills, NC)

### 42.5 Mountaineering

According to the SFIA, 2.3 million people in the U.S. engaged in climbing as a recreational activity at least once in 2013. This number includes traditional climbing, ice
climbing, and mountaineering.  

Climbing is popular worldwide. The International Climbing and Mountaineering Federation (UIAA, www.theuiaa.org), the world governing body in mountaineering and climbing, has 1.3 million members worldwide.

The most popular mountaineering destinations in the United States are the Rocky Mountains, the Sierra Nevada of California, the Cascades of the Pacific Northwest, the high peaks of The Alaska Range, and Saint Elias Mountains.

Mount McKinley, in Denali National Park (Alaska), is the highest mountain in North America (20,320 feet) and one of the World’s Seven Summits. It is the only mountain ranked by National Geographic among the world’s Top 10 climbs. Mountaineers typically climb Mount McKinley in guided groups. RMI (www.rmiguides.com), the longest-running guide service operating at the mountain, has led over 300 expeditions.

Mount Rainier offers the largest glaciers in the continental United States. About 8,000 to 13,000 people attempt the climb each year; about half of the attempts are successful, with weather and conditioning being the most common reasons for failure. It typically takes climbers two to three days to reach the summit.

### 42.6 Paddling Sports

According to the Sports & Fitness Industry Association, participation in paddling sports has been as follows:

**Canoeing**
- 2008: 9.9 million
- 2009: 10.0 million
- 2010: 10.3 million
- 2011: 10.2 million
- 2012: 9.8 million
- 2013: 10.2 million

**Kayaking**
- 2008: 5.7 million
- 2009: 6.2 million
- 2010: 6.3 million
- 2011: 7.3 million
- 2012: 8.2 million
- 2013: 8.7 million

**Rafting**
- 2008: 4.5 million
- 2009: 4.5 million
- 2010: 4.4 million
- 2011: 4.1 million
Paddling sports are popular in metropolitan areas as well as in back country areas.

“No need to head to the wilderness for a paddling adventure. Most cities are built on water, which means you can kayak, canoe, and even whitewater-raft just a few miles from downtown. Many cities have greenbelts associated with their waterway.”

David Brown, Executive Director
American Outdoors Association

The following are among the most popular urban areas for paddling:

- Atlanta, GA: Chattahoochee River National Recreation Area (http://nps.gov/chat/index.htm)
- Austin, TX: Lady Bird Lake (www.austintexas.org)
- Boise ID: Boise River (http://cityofboise.org/departments/parks/page17909.aspx)
- Minneapolis, MN: Mississippi River (www.abovethefallssports.com)
- Richmond, VA: James River (www.jamesriverpark.org)
- San Francisco, CA: Golden Gate National Recreation Area (www.seatrek.com)
- Seattle, WA: Puget Sound and Lake Union (www.visitseattle.org)
- Washington, DC: Potomac River (www.washington.org)
- Wausau, WI: Wisconsin River - Whitewater Park (www.wausauwhitewater.org)

### 42.7 Skydiving

Skydivers make an estimated 3.2 million jumps each year in the United States. Most people make their first jump with an experienced instructor in the form of a...
tandem skydive.

The United States Parachute Association (USPA; www.uspa.org), the primary organization for skydivers in the United States, has 35,000 members.

The demographics of USPA members are as follows:

**Gender**
- Female: 13%
- Male: 87%

**Age**
- 16-to-30: 24%
- 31-to-39: 29%
- 40-to-49: 23%
- 50-to-59: 16%
- Over 60: 8%

The following links to a list of the larger skydiving operators in the U.S.: www.rkma.com/leisure.skydiving.pdf.

### 42.8 Treasure Hunting

The intrigue of striking it rich by finding a lost or overlooked treasure appeals to millions of people. Treasures waiting to be found in the Americas include buried caches of money and gold coins, sunken pirate and merchant ships, lost mines, ancient artifacts, meteorites, and fossils.

So popular is treasure hunting, there are four major magazines and hundreds of books on finding treasures.

According to the World Wide Association of Treasure Seekers (www.wwats.org), over one million metal detectors, with an average price between $250 and $350, are sold annually in the U.S. About 60% of treasure hunters typically pay for their investment within a year with the value of their finds.

### 42.9 Ultimate Frisbee

Ultimate Frisbee, commonly called Ultimate, is a rapidly-growing non-contact sport played with a flying disc. The object of the game is to score points by passing the disc to a player in the opposing end-zone, similar to an end-zone in American football or rugby.

According to the Sports & Fitness Industry Association, 5.1 million people played Ultimate in 2013; 1.4 million did so 13 or more times.

According to USA Ultimate (www.usaultimate.org), the national governing body for the sport of Ultimate, there are over 600 college teams in North America. Separated into Open (nearly 450 teams) and Women’s (around 200 teams) Divisions, teams compete in the UPA Championship series during the spring, with winners advancing to
nationals to compete for the championship title in May.

Ultimate is hugely popular in the Pacific Northwest region, and co-ed leagues offer games for players of every level. The Potlatch Tournament, held annually in July, attracts the West Coast’s best players.

42.10 Market Resources
American Outdoors Association, P.O. Box 10847, Knoxville, TN 37939. (800) 524-4814. (www.americanoutdoors.org)

Association of Outdoor Recreation and Education, 1100 North Main Street, Suite 111, Ann Arbor, MI 48104. (810) 299-2782. (www.aore.org)

Outdoor Industry Association, 4909 Pearl East Circle, Suite 300, Boulder, CO 80301. (303) 444-3353. (www.outdoorindustry.org)

43

PARKS - CITY

43.1 Overview

An estimated 80% of Americans live, work, and play in urban areas. Urban greenspace provides a range of tangible benefits, such as mitigating air and water pollution, combating suburban sprawl, providing opportunities for recreation, reducing crime and fostering cohesive neighborhoods, attracting businesses, and stabilizing property values. As part of a broader urban agenda, investing in open space can serve as an anchor for revitalizing neighborhoods and building healthy communities.

Many city parks serve as a cornerstone for leisure activities through such offerings as a zoo, museums, restaurants, and botanical gardens. Festivals, outdoor concerts, summer theater, seasonal farmers’ markets, and other cultural attractions hosted at parks also have appeal.

43.2 Top City Parks

According to the Trust For Public Land (TPL, www.tpl.org), the following are the most-visited city parks* in the U.S.:

- Central Park (New York, NY): 37,500,000
- Lincoln Park (Chicago, IL): 20,000,000
- Mission Bay Park (San Diego, CA): 16,500,000
- Balboa Park (San Diego, CA): 14,000,000
- Golden Gate Park (San Francisco, CA): 13,000,000
- Forest Park (St. Louis, MO): 12,000,000
- Griffith Park (Los Angeles, CA): 12,000,000
- Coney Island Beach and Boardwalk (New York, NY): 10,600,000
- Fairmount Park (Philadelphia, PA): 10,000,000
- National Mall (Washington, DC): 10,000,000
- Cleveland Lakefront State Park (Cleveland, OH): 8,431,000
- Prospect Park (New York, NY): 8,000,000
- Hermann Park (Houston, TX): 5,600,000
- Liberty State Park (Jersey City, NJ): 5,326,978
- City Park (New Orleans, LA): 5,000,000
- Old Sacramento State Historic Park (Sacramento, CA): 5,000,000
- The Presidio (San Francisco, CA): 5,000,000
- Fair Park (Dallas, TX): 4,999,300
<table>
<thead>
<tr>
<th>Park Name</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chain of Lakes Regional Park (Minneapolis, MN)</td>
<td>4,860,800</td>
</tr>
<tr>
<td>Bryant Park (New York, NY)</td>
<td>4,200,000</td>
</tr>
<tr>
<td>Millennium Park (Chicago, IL)</td>
<td>4,000,000</td>
</tr>
<tr>
<td>Piedmont Park (Atlanta, GA)</td>
<td>4,000,000</td>
</tr>
<tr>
<td>Statue of Liberty National Monument (New York, NY)</td>
<td>3,833,288</td>
</tr>
<tr>
<td>Independence National Historical Park (Philadelphia, PA)</td>
<td>3,751,007</td>
</tr>
<tr>
<td>Green Lake Park (Seattle, WA)</td>
<td>3,650,000</td>
</tr>
<tr>
<td>White River State Park (Indianapolis, IN)</td>
<td>3,300,000</td>
</tr>
<tr>
<td>Memorial Park (Houston, TX)</td>
<td>3,246,000</td>
</tr>
<tr>
<td>Centennial Olympic Park (Atlanta, GA)</td>
<td>3,200,000</td>
</tr>
<tr>
<td>Battery Park (New York, NY)</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Belle Isle Park (Detroit, MI)</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Como Park (Saint Paul, MN)</td>
<td>3,000,000</td>
</tr>
<tr>
<td>White River Greenway (Indianapolis, IN)</td>
<td>3,000,000</td>
</tr>
<tr>
<td>Riverside Park (New York, NY)</td>
<td>2,800,000</td>
</tr>
<tr>
<td>Drew Field (Jacksonville, FL)</td>
<td>2,500,000</td>
</tr>
<tr>
<td>Tower Grove Park (St. Louis, MO)</td>
<td>2,485,300</td>
</tr>
<tr>
<td>Jefferson National Expansion Memorial (St. Louis, MO)</td>
<td>2,436,110</td>
</tr>
<tr>
<td>Rockaway Beach and Boardwalk (New York, NY)</td>
<td>2,300,000</td>
</tr>
<tr>
<td>Lake Harriet Park/Lyndale Park (Minneapolis, MN)</td>
<td>2,250,000</td>
</tr>
<tr>
<td>Boston Common (Boston, MA)</td>
<td>2,200,000</td>
</tr>
<tr>
<td>Swope Park (Kansas City, MO)</td>
<td>2,100,000</td>
</tr>
<tr>
<td>Boston National Historical Park (Boston, MA)</td>
<td>2,060,497</td>
</tr>
<tr>
<td>City Park (Denver, CO)</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Garden of the Gods Park (Colorado Springs, CO)</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Lyon Park (St. Louis, MO)</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Rock Creek Park (Washington, DC)</td>
<td>1,883,457</td>
</tr>
<tr>
<td>Delaware Park (Buffalo, NY)</td>
<td>1,800,000</td>
</tr>
<tr>
<td>First Landing State Park (Virginia Beach, VA)</td>
<td>1,762,464</td>
</tr>
<tr>
<td>Schenley Park and Plaza (Pittsburgh, PA)</td>
<td>1,750,000</td>
</tr>
<tr>
<td>Country/Jaycee Park (Greensboro, NC)</td>
<td>1,586,316</td>
</tr>
<tr>
<td>Encanto Park (Phoenix, AZ)</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Louisville Waterfront Park (Louisville, KY)</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Park at Lady Bird Lake (Austin, TX)</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Point State Park (Pittsburgh, PA)</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Trinity Park (Fort Worth, TX)</td>
<td>1,500,000</td>
</tr>
<tr>
<td>San Antonio Missions National Historical Park (San Antonio, TX)</td>
<td>1,304,690</td>
</tr>
<tr>
<td>Balloon Fiesta Park (Albuquerque, NM)</td>
<td>1,300,000</td>
</tr>
<tr>
<td>Chugach State Park (Anchorage, AK)</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Monon Greenway Park (Indianapolis, IN)</td>
<td>1,200,000</td>
</tr>
<tr>
<td>San Antonio Riverwalk (San Antonio, TX)</td>
<td>1,200,000</td>
</tr>
<tr>
<td>The Esplanade (Boston, MA)</td>
<td>1,100,000</td>
</tr>
<tr>
<td>Centennial Park (Santa Ana, CA)</td>
<td>1,040,000</td>
</tr>
<tr>
<td>Park Name</td>
<td>Visitors</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Burke-Gilman Trail (Seattle, WA)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Bushnell Park (Hartford, CT)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Centennial Park (Nashville, TN)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Eden Park (Cincinnati, OH)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Jackson Square (New Orleans, LA)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Longview Lake Park (Kansas City, MO)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Myriad Gardens (Oklahoma City, OK)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Overton Park (Memphis, TN)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Tower Grove Park (St. Louis, MO)</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Timucuan Ecological &amp; Historic Preserve</td>
<td>993,948</td>
</tr>
<tr>
<td>Nu’uanu Pali State Wayside</td>
<td>905,300</td>
</tr>
<tr>
<td>T.O. Fuller State Park (Memphis, TN)</td>
<td>856,338</td>
</tr>
<tr>
<td>Discovery Green (Houston, TX)</td>
<td>850,000</td>
</tr>
<tr>
<td>McCormick-Stillman Park (Scottsdale, AZ)</td>
<td>850,000</td>
</tr>
<tr>
<td>Park Road Park (Charlotte, NC)</td>
<td>815,980</td>
</tr>
<tr>
<td>South Mountain Park (Phoenix, AZ)</td>
<td>787,305</td>
</tr>
<tr>
<td>Audubon Park (New Orleans, LA)</td>
<td>770,000</td>
</tr>
<tr>
<td>Cabrillo National Monument (San Diego, CA)</td>
<td>763,140</td>
</tr>
<tr>
<td>Al Lopez [Horizon] Park (Tampa, FL)</td>
<td>750,000</td>
</tr>
<tr>
<td>Franke Park (Fort Wayne, IN)</td>
<td>750,000</td>
</tr>
<tr>
<td>Mount Trashmore Park (Virginia Beach, VA)</td>
<td>711,651</td>
</tr>
<tr>
<td>Land Park (Sacramento, CA)</td>
<td>710,000</td>
</tr>
<tr>
<td>Woodward Park (Fresno, CA)</td>
<td>700,500</td>
</tr>
<tr>
<td>Randall’s Island (New York, NY)</td>
<td>700,000</td>
</tr>
<tr>
<td>Freedom Park (Charlotte, NC)</td>
<td>682,000</td>
</tr>
<tr>
<td>Martin Luther King, Jr. National Historic Site</td>
<td>658,452</td>
</tr>
<tr>
<td>El Dorado Park (Long Beach, CA)</td>
<td>645,000</td>
</tr>
<tr>
<td>Fairmount Park (Riverside, CA)</td>
<td>641,000</td>
</tr>
<tr>
<td>Eagle Creek Park (Indianapolis, IN)</td>
<td>635,206</td>
</tr>
<tr>
<td>Diamond Head State Monument (Honolulu, HI)</td>
<td>634,300</td>
</tr>
<tr>
<td>Julia Davis Park (Boise, ID)</td>
<td>629,067</td>
</tr>
<tr>
<td>Fort McHenry National Monument (Baltimore, MD)</td>
<td>611,582</td>
</tr>
<tr>
<td>Ottawa Park (Toledo, OH)</td>
<td>600,000</td>
</tr>
<tr>
<td>William B. Umstead State Park (Raleigh, NC)</td>
<td>595,424</td>
</tr>
<tr>
<td>Lewis and Clark Landing (Omaha, NE)</td>
<td>587,399</td>
</tr>
<tr>
<td>Hermann Square (Houston, TX)</td>
<td>584,000</td>
</tr>
<tr>
<td>William W. Powers State Recreation Area (Chicago, IL)</td>
<td>575,000</td>
</tr>
<tr>
<td>Pioneers Park (Lincoln, NE)</td>
<td>550,000</td>
</tr>
<tr>
<td>Pullen Park (Raleigh, NC)</td>
<td>540,000</td>
</tr>
<tr>
<td>Tranquility Park (Houston, TX)</td>
<td>517,000</td>
</tr>
<tr>
<td>Sawyer Point (Cincinnati, OH)</td>
<td>506,123</td>
</tr>
<tr>
<td>Cherokee Park (Louisville, KY)</td>
<td>500,000</td>
</tr>
<tr>
<td>Heritage Park (Irvine, CA)</td>
<td>500,000</td>
</tr>
<tr>
<td>Meridian Hill Park (Washington, DC)</td>
<td>500,000</td>
</tr>
</tbody>
</table>
- Mohawk Park (Tulsa, OK): 500,000
- Riverside Park - Central (Wichita, OK): 500,000
- Seneca Park (Louisville, KY): 500,000
- Shelby Farms Park (Memphis, TN): 500,000
- Warner Park (Madison, WI): 500,000
- Adobe Dam Recreation Area (Phoenix, AZ): 438,310
- Bayfront Park (Miami, FL): 433,362
- Town Square (Anchorage, AK): 425,000

* State Parks and National Park Service properties located within cities are included.

The following cities have the largest budgets for city parks (source: TPL):

- New York, NY: $1,357,902,998
- Chicago, IL: $425,137,086
- Washington, DC: $238,818,049
- Los Angeles, CA: $224,331,796
- San Francisco, CA: $214,527,359
- Phoenix, AZ: $159,305,265
- Seattle, WA: $157,368,865
- San Diego, CA: $138,408,677
- Las Vegas, NV: $132,734,836
- Dallas, TX: $91,346,676
- Denver, CO: $89,370,502
- Minneapolis, MN: $87,416,955
- Milwaukee, WI: $86,490,153
- Portland, OR: $85,656,096
- Houston, TX: $84,757,819
- Cincinnati, OH: $75,068,032
- San Antonio, TX: $71,851,339
- Boston, MA: $70,808,037
- Virginia Beach, VA: $63,462,184

The following cities have the largest spending per capita for city parks (source: TPL):

<table>
<thead>
<tr>
<th>Population</th>
<th>Spending Per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>599,657</td>
<td>$398</td>
</tr>
<tr>
<td>815,358</td>
<td>$263</td>
</tr>
<tr>
<td>616,627</td>
<td>$255</td>
</tr>
<tr>
<td>567,641</td>
<td>$234</td>
</tr>
<tr>
<td>385,378</td>
<td>$227</td>
</tr>
<tr>
<td>333,012</td>
<td>$225</td>
</tr>
<tr>
<td>281,253</td>
<td>$208</td>
</tr>
<tr>
<td>256,445</td>
<td>$203</td>
</tr>
<tr>
<td>8,391,881</td>
<td>$162</td>
</tr>
</tbody>
</table>
• Plano, TX: 273,613 $152
• Portland, OR: 566,143 $151
• Chicago, IL: 2,851,268 $149
• Irvine, CA: 209,716 $149
• Denver, CO: 610,345 $146
• Virginia Beach, VA: 433,570 $146
• Raleigh, NC: 405,612 $142
• Oakland, CA: 409,189 $137
• Sacramento, CA: 466,676 $133
• Durham, NC: 229,171 $130
• St. Petersburg, FL: 244,324 $128

43.3 ParkScore
Since 2012, the Trust for Public Lands has measured how well the largest U.S. cities are meeting the need for parks using the ParkScore Index. The index rates on three measures, as follows:
• Park access, which measures the percentage of residents living within about a half-mile of a park
• Park size, based on a city’s median park size and the percentage of total city area dedicated to parks
• Services and investment, a combination of the number of playgrounds per 10,000 city residents and per capita spending

The 2014 ParkScore assessment, which evaluated the 60 largest metropolitan areas, ranked the top city park systems as follows:
1. Minneapolis, MN
2. New York, NY
3. (tie) Boston, MA
3. (tie) Portland, OR
3. (tie) San Francisco, CA
6. Washington, DC
7. (tie) Denver, CO
7. (tie) Sacramento, CA
9. San Diego, CA
10. (tie) Virginia Beach, VA
10. (tie) Aurora, CO

43.4 New Parks
New park development and expansions are being seen throughout the U.S. as many regions are moving away from the sprawled suburban developments that first drew attention away from urban centers and their area parks.
Over the past five years, 29 of the nation’s largest cities have added nearly 14,000 acres of new park land. The biggest increases in park space have been in sprawling municipalities like Houston and Jacksonville, but even densely packed older cities such as Cleveland (with 187 new acres) and Philadelphia (22 acres) are finding ways to create new open space. The following are examples:

**Atlanta, GA**
- The BeltLine (www.beltline.org) – estimated at $1.7 billion to $2.8 billion – will add bike trails, running trails, park space, and mass transit to area surrounding downtown. Upon completion the project will double Atlanta’s park acreage and become the city’s largest park. The first portion of the park, a multi-use trail, opened in 2011, and a walking trail with a terminus at Piedmont Park opened in 2012.

**Houston, TX**
- Private donors financed Discovery Green (www.discoverygreen.com), a 12-acre park located near several major hotels, the George R. Brown Convention Center, and two of the city’s sports venues: Toyota Center and Minute Maid Field. Opened in 2008, events, festivals, performances, and children’s festivities are held at the $122 million park.

**Los Angeles, CA**
- Grand Park (www.grandparkla.org) opened in 2012. Designed for a major concert, a farmers’ market, or a participatory dance recital, the park attracts office workers, suburbanites from across the region, tourists, and urban dwellers who call downtown L.A. home.

---

“The Sandwished between City Hall and Disney Hall, Grand Park is the latest attempt to revitalize a neighborhood where sidewalks once rolled up by nightfall but now bustles with a new restaurant or bar opening seemingly every week. Depending on whom you ask, it elicits comparisons to New York’s Central Park or San Francisco’s Union Square – and a couple of the most enthusiastic supporters even liken it to the Champs-Elysees.”

*The New York Times*
Irvine, CA
• Portions of Orange County Great Park (www.ocgp.org) opened in 2011. At the Great Balloon Park, the first attraction to open, free flights rise 400 feet above the surrounding landscape, serving as a public observation deck for the Great Park’s development. Construction continues and, when complete, the $1.1 billion Great Park will be 60% larger than New York’s Central Park. Located on a former military base, the park will include a 2.5-mile man-made canyon and a massive wildlife corridor. The plan also calls for museums, open space, sports facilities, riparian corridors, commercial agriculture, botanical gardens, woodlands, and 45 holes of golf.

Memphis, TN
• The 4,500-acre Shelby Farms (www.shelbyfarmspark.org), a former prison farm, opened as a recreational area in the 1970s. A master plan was put in place in 2008 to direct a major re-design of the park. An 18-hole disc golf course opened in 2010 near the welcome center of the park, and additional hiking and biking trails have been added. The Tour de Wolf, an unpaved trail, takes hikers and bikers through the woods of Shelby Farms Park for 6.1 miles. Horseback riding is allowed in parts of the park and on a few trails. Bison have been introduced to the park and one million trees are being planted. An extension of Patriot Lake is planned to accommodate more boating and surfing activities. There is also a working farm in the park.

_________________________________________________________________
“National Geographic Traveler named Memphis as one of the Top 20 cities to see in 2013 (Best Trips 2013). Among the reasons to visit are Shelby Farms Park and Shelby Farms Greenline.”

Shelby Park Farms Conservancy

_________________________________________________________________
New York, NY
• Among the most ambitious park developments is the plan to convert the Fresh Kills landfill in Staten Island to a 2,315-acre recreation area. The former landfill will include biking trails, boating and fishing spots, waterfront restaurants, and art. At 2,200 acres, Freshkills Park will be almost three times the size of Central Park and the largest park developed in New York City in over 100 years. The site is already rich in birdlife and areas of the site were opened to visitors in 2012 for birdwatching as well as to view the projects under construction.
Seattle, WA
• Olympic Sculpture Park (www.seattleartmuseum.org/visit/olympic-sculpture-park), a nine-acre park which opened in 2007, was built on a former oil-transfer site. The sculpture park was visited by about 400,000 people in 2013.

### 43.5 Fitness Parks

Free outdoor gyms are being added to city parks across the U.S. The Fitness Zones program, developed in 2009 by the Trust for Public Land, serves as a model for the fitness gyms and helps cities fund outdoor health playgrounds. Zones usually have six to eight exercise units but some, such as one in New Orleans, have 18.

In Florida, Miami-Dade County’s Parks, Recreations and Open Spaces has 11 Fitness Zones, eight of which opened in 2012, with plans to add them in all 40 parks.

St. Petersburg, Florida, opened three Fitness Zones in 2012 and two more in 2013. One, the Azalea Park Fitness Zone near the Veterans Hospital, is the first in the nation to have equipment that is wheelchair accessible.

_____________________________________________________

“In 30 years as parks and recreation director, I have never seen as much of an immediate impact. One of our goals is to improve the health of our citizens. It’s just really been a win, win, win, win.”

Sherry McBee, Director
Parks and Recreation Department
St. Petersburg, Florida

_____________________________________________________

In California, Los Angeles County has 41 fitness areas in its parks.

### 43.6 Market Resources

National Recreation and Park Association, 22377 Belmont Ridge Road, Ashburn, VA 20148. (800) 626-6772. (www nrpa.org)

Trust For Public Land, 660 Pennsylvania Avenue SE, Suite 401, Washington, DC 20003. (202) 543-7552. (www.tpl.org)
44

PARKS - NATIONAL

44.1 Visits To National Park Properties

The National Park System is administered by the National Park Service (NPS, www.nps.gov). Visits to parks and properties within the National Park System have been as follows:

- 2001: 279.9 million
- 2002: 277.3 million
- 2003: 276.1 million
- 2004: 276.9 million
- 2005: 273.5 million
- 2006: 272.6 million
- 2007: 275.6 million
- 2008: 274.8 million
- 2009: 285.6 million
- 2010: 281.3 million
- 2011: 278.9 million
- 2012: 282.8 million
- 2013: 273.6 million

 Ninety percent of Americans live within 60 minutes of a National Park. National parks have a $12 billion economic impact on local and state economies.

There are 370 units of the National Park System. Designations and number of visitors in 2013 were as follows:

<table>
<thead>
<tr>
<th>Units</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Battlefield (NB):</td>
<td>10 1,753,670</td>
</tr>
<tr>
<td>National Battlefield Park (NBP):</td>
<td>4 2,671,668</td>
</tr>
<tr>
<td>National Historic Site (NHS):</td>
<td>76 9,614,227</td>
</tr>
<tr>
<td>National Historical Park (NHP):</td>
<td>44 28,607,594</td>
</tr>
<tr>
<td>National Lakeshore (NL):</td>
<td>4 3,745,708</td>
</tr>
<tr>
<td>National Memorial (NMEM):</td>
<td>29 34,330,612</td>
</tr>
<tr>
<td>National Military Park (NMP):</td>
<td>9 5,050,057</td>
</tr>
<tr>
<td>National Monument (NM):</td>
<td>70 18,660,138</td>
</tr>
<tr>
<td>National Park (NP):</td>
<td>59 63,514,727</td>
</tr>
<tr>
<td>National Parkway (NPKWY):</td>
<td>4 27,479,002</td>
</tr>
<tr>
<td>National Preserve (NPRES):</td>
<td>9 2,934,230</td>
</tr>
<tr>
<td>National Reserve (NRES):</td>
<td>1 94,906</td>
</tr>
</tbody>
</table>

• 233 •
<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Recreation Area (NRA)</td>
<td>17</td>
<td>43,997,058</td>
</tr>
<tr>
<td>National River (NR)</td>
<td>5</td>
<td>4,115,927</td>
</tr>
<tr>
<td>National Seashore (NS)</td>
<td>10</td>
<td>18,664,804</td>
</tr>
<tr>
<td>National Wild &amp; Scenic River (W&amp;SR)</td>
<td>7</td>
<td>1,048,316</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
<td>7,348,251</td>
</tr>
</tbody>
</table>

In 2013, the most-visited NPS units were as follows:

- Golden Gate NRA: 14,289,121
- Blue Ridge PKWY: 12,877,368
- Great Smoky Mountains NP: 9,354,695
- George Washington MEM PKWY: 7,360,392
- Lincoln Memorial: 6,546,518
- Lake Mead NRA: 6,344,714
- Gateway NRA: 6,191,246
- Natchez Trace PKWY: 6,012,740
- Chesapeake & Ohio Canal NHP: 4,941,367
- Delaware Water Gap NRA: 4,843,350
- Gulf Islands NS: 4,837,965
- Grand Canyon NP: 4,564,840
- Cape Cod NS: 4,501,898
- San Francisco Maritime NHP: 4,154,455
- Vietnam Veterans MEM: 4,142,721
- World War II Memorial: 3,934,166
- Yosemite NP: 3,691,191
- Independence NHP: 3,553,070
- Korean War Veterans Memorial: 3,209,279
- Martin Luther King, Jr. Memorial: 3,205,654

The number of visitors to each National Park property in 2013 is provided at [www.rkma.com/leisure/NationalParks.pdf](http://www.rkma.com/leisure/NationalParks.pdf).

### 44.2 Market Resources
National Park Service, Public Use Statistics Office, P.O. Box 25287, Denver, CO 80225. ([www.nature.nps.gov/socialscience/stats.cfm](http://www.nature.nps.gov/socialscience/stats.cfm))
### 45.1 State Park Visitors

According to the National Association of State Park Directors (NASPD, www.naspd.org), states have a combined 3,235 state parks, with 6,624 units, and attract 725 million visitors annually. In aggregate, state parks offer 41,725 miles of trails, 207,063 campsites, and 7,161 cabins and lodges.

The following are the number of parks and annual park visitations for each state:

<table>
<thead>
<tr>
<th>State</th>
<th>Number</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama (<a href="http://www.alapark.com">www.alapark.com</a>)</td>
<td>22</td>
<td>4.4 million</td>
</tr>
<tr>
<td>Alaska (<a href="http://www.dnr.state.ak.us/parks">www.dnr.state.ak.us/parks</a>)</td>
<td>&gt;100</td>
<td>4.0 million</td>
</tr>
<tr>
<td>Arizona (<a href="http://www.pr.state.az.us">www.pr.state.az.us</a>)</td>
<td>28</td>
<td>2.3 million</td>
</tr>
<tr>
<td>Arkansas (<a href="http://www.arkansasstateparks.com">www.arkansasstateparks.com</a>)</td>
<td>51</td>
<td>9.8 million</td>
</tr>
<tr>
<td>California (<a href="http://www.parks.ca.gov">www.parks.ca.gov</a>)</td>
<td>278</td>
<td>85.2 million</td>
</tr>
<tr>
<td>Colorado (<a href="http://www.parks.state.co.us">www.parks.state.co.us</a>)</td>
<td>44</td>
<td>12.1 million</td>
</tr>
<tr>
<td>Connecticut (<a href="http://www.ct.gov/dep/site/default.asp">www.ct.gov/dep/site/default.asp</a>)</td>
<td>94</td>
<td>6.6 million</td>
</tr>
<tr>
<td>Delaware (<a href="http://www.destateparks.com">www.destateparks.com</a>)</td>
<td>14</td>
<td>3.9 million</td>
</tr>
<tr>
<td>Florida (<a href="http://www.floridastateparks.org">www.floridastateparks.org</a>)</td>
<td>159</td>
<td>19.1 million</td>
</tr>
<tr>
<td>Georgia (<a href="http://www.gadnr.org">www.gadnr.org</a>)</td>
<td>64</td>
<td>12.8 million</td>
</tr>
<tr>
<td>Hawaii (<a href="http://www.hawaii.gov/dlnr/dsp/dsp.html">www.hawaii.gov/dlnr/dsp/dsp.html</a>)</td>
<td>52</td>
<td>9.2 million</td>
</tr>
<tr>
<td>Idaho (<a href="http://www.idahoparks.org">www.idahoparks.org</a>)</td>
<td>30</td>
<td>2.8 million</td>
</tr>
<tr>
<td>Illinois (<a href="http://www.dnr.state.il.us/lands/landmgtparks">www.dnr.state.il.us/lands/landmgtparks</a>)</td>
<td>49</td>
<td>43.3 million</td>
</tr>
<tr>
<td>Indiana (<a href="http://www.in.gov/dnr/parklake">www.in.gov/dnr/parklake</a>)</td>
<td>23</td>
<td>18.3 million</td>
</tr>
<tr>
<td>Iowa (<a href="http://www.iowa.gov/state/main/index.html">www.iowa.gov/state/main/index.html</a>)</td>
<td>84</td>
<td>14.6 million</td>
</tr>
<tr>
<td>Kansas (<a href="http://www.kdwp.state.ks.us">www.kdwp.state.ks.us</a>)</td>
<td>24</td>
<td>7.3 million</td>
</tr>
<tr>
<td>Kentucky (<a href="http://www.parks.ky.gov">www.parks.ky.gov</a>)</td>
<td>52</td>
<td>7.6 million</td>
</tr>
<tr>
<td>Louisiana (<a href="http://www.crt.state.la.us">www.crt.state.la.us</a>)</td>
<td>35</td>
<td>2.1 million</td>
</tr>
<tr>
<td>Maine (<a href="http://www.maine.gov/doc/parks">www.maine.gov/doc/parks</a>)</td>
<td>&gt;30</td>
<td>2.2 million</td>
</tr>
<tr>
<td>Maryland (<a href="http://www.dnr.state.md.us/publiclands">www.dnr.state.md.us/publiclands</a>)</td>
<td>66</td>
<td>10.7 million</td>
</tr>
<tr>
<td>Massachusetts (<a href="http://www.mass.gov/eea/agencies/dcr/massparks">www.mass.gov/eea/agencies/dcr/massparks</a>)</td>
<td>45</td>
<td>10.0 million</td>
</tr>
<tr>
<td>Michigan (<a href="http://www.michigan.gov/dnr">www.michigan.gov/dnr</a>)</td>
<td>97</td>
<td>20.5 million</td>
</tr>
<tr>
<td>Minnesota (<a href="http://www.dnr.state.mn.us/state_parks/index.html">www.dnr.state.mn.us/state_parks/index.html</a>)</td>
<td>72</td>
<td>7.8 million</td>
</tr>
<tr>
<td>Mississippi (<a href="http://home.mdwfp.com">http://home.mdwfp.com</a>)</td>
<td>24</td>
<td>3.1 million</td>
</tr>
<tr>
<td>Missouri (<a href="http://www.mostateparks.com">www.mostateparks.com</a>)</td>
<td>81</td>
<td>17.0 million</td>
</tr>
<tr>
<td>Montana (<a href="http://www.fwp.mt.gov/parks/default.html">www.fwp.mt.gov/parks/default.html</a>)</td>
<td>50</td>
<td>1.5 million</td>
</tr>
<tr>
<td>Nebraska (<a href="http://www.ngpc.state.ne.us">www.ngpc.state.ne.us</a>)</td>
<td>87</td>
<td>9.9 million</td>
</tr>
<tr>
<td>Nevada (<a href="http://www.parks.nv.gov">www.parks.nv.gov</a>)</td>
<td>24</td>
<td>4.1 million</td>
</tr>
</tbody>
</table>
• New Hampshire (www.nhparks.state.nh.us): 72 2.8 million
• New Jersey (www.state.nj.us/dep/parksandforests): 42 14.1 million
• New Mexico (www.emnrd.state.nm.us/main/index.htm): 31 3.8 million
• New York (www.nysparks.com): 176 53.5 million
• North Carolina (www.ncparks.gov): 29 11.2 million
• North Dakota (www.ndparks.com): 17 1.0 million
• Ohio (www.dnr.state.oh.us/tabid/80/default.aspx): 74 53.4 million
• Oklahoma (www.touroklahoma.com): 50 14.1 million
• Oregon (http://oregon.gov/OPRD/index.shtml): 231 45.1 million
• Pennsylvania (www.dcnr.state.pa.us/stateparks): 116 38.0 million
• Rhode Island (www.riparks.com): 14 3.1 million
• South Carolina (www.southcarolinaparks.com): 47 7.4 million
• South Dakota (http://gfp.sd.gov/state-parks): 12 9.2 million
• Tennessee (www.state.tn.us/environment/parks): 54 16.9 million
• Texas (www.tpwd.state.tx.us/spdest): 115 9.7 million
• Utah (www.stateparks.utah.gov): 40 5.9 million
• Vermont (www.vtstateparks.com): 52 679,000
• Virginia (www.dcr.virginia.gov/state_parks/index.shtml): 34 6.1 million
• Washington (www.parks.wa.gov): 120 40.4 million
• West Virginia (www.wvparks.com): 37 7.8 million
• Wisconsin (http://dnr.wi.gov/topic/parks): 95 15.0 million
• Wyoming (http://wyoparks.state.wy.us): 24 2.3 million

A directory of state parks is available at www.americasstateparks.org/Find-A-Park.

45.2 Economic Impact
According to the NASPD, state parks have an economic impact of more than $20 billion annually on the communities they serve.

Several states have recently completed economic impact studies of their state parks. The following is a summary of these studies:

Arizona
• According to The Economic Impact of Arizona State Parks, an assessment by the Arizona Hospitality Research & Resource Center at Northern Arizona University, W.A. Franke College of Business, direct annual spending by Arizona State Park visitors totals $163 million, or $70.84 per person. The combined total economic impact (direct spending, indirect, and induced impacts) of recreation parks is $156.8 million; historic parks and conservation parks contribute $35.4 million and $32.2 million, respectively. The study is available at http://azstateparks.com/publications/downloads/2009_ASP_Economic_Impact_c.pdf.
California
- The 85.2 million visitors to California state parks generate approximately $2.6 billion in spending in local communities and an estimated $6.7 billion in total output and new sales.

Maryland
- According to the Maryland State Parks Economic Impact & Visitor Study (www.dnr.state.md.us/publiclands/pdfs/economicimpactstudy2010.pdf), visitors directly spend more than $567 million during their trips to state parks, producing a total economic impact of more than $650 million annually.

New York
- The park system boosts the New York economy by about $2 billion, providing a 5-to-1 return on investment for state spending. State spending produces about 6,600 jobs; visitor spending supports an additional 13,500 jobs, according to an independent study (www.ptny.org/pdfs/parks/EconomicImpactofStateParks.pdf).

North Carolina
- According to a study (www.ncparks.gov/News/special/economic_impact.php) by researchers at North Carolina State University, state parks contribute $289 million to local economies annually as well as $120 million to local residents’ income.

Pennsylvania
- A study by the Department of Recreation, Park and Tourism Management at Penn State (www.hhdev.psu.edu/rptm/) assessed that the 38.0 million visitors to Pennsylvania state parks spend $859 million on their trips and support 12,630 jobs.

Tennessee
- Economic Impacts of Tennessee State Parks is prepared every five years by the University of Tennessee Institute of Agriculture (https://ag.tennessee.edu). Tennessee 2020 estimated direct spending by the 16.9 million annual visitors to Tennessee state parks at $725.2 million, with 12,000 jobs supported. Including indirect expenditures, the impact to the state’s economy is $1.5 billion.

Texas
- Economic activity generated by visitors to the 80 state parks in Texas is estimated at $793 million in sales and accounts for 11,928 jobs. The study is available at www.tpwd.state.tx.us/publications/nonpwdpubs/media/economic_impact_report.pdf.

Utah
- Utah’s state parks contribute $67 million in state economic benefit through day-use, camping, and golf. The study (http://stateparks.utah.gov/about/economicbenefits) assesses the economic impact of each park within the state.
45.3 Market Resources
National Association of State Park Directors, 8829 Woodyhill Road, Raleigh, NC 27613. (919) 676-8365. (www.naspd.org)
46 PHOTOGRAPHY

46.1 Photo Enthusiasts

According to the Photo Marketing Association (PMA, www.pmai.org), there are 37.2 million photo enthusiasts, defined as individuals that use a digital single-lens reflex camera (DSLR). Among this group, 16.7 million people have made some amount of money with their photography.

46.2 Digital Photography

The photography industry has transitioned away from mainstream use of film to digital photography. Printmaking and photo storage have also changed, with many people converting their print photos to digital format. Various services are available that scan print photos onto a CD. Online photo storage services and myriad devices have helped the continued growth of digital photography.

The modest costs associated with digital photography have led to dramatic growth of photography as a leisure activity. There was a time when an individual who was interested in getting into the hobby had quite an initial investment to make. To get a serious start, one would need to purchase a single-lens reflex (SLR) camera, darkroom equipment, 35mm film, developing chemicals, photo paper, etc. With digital photography, once the initial purchase of a quality digital camera and professional imaging software (such as Adobe Photoshop) are made, there is little to no expense required to maintain the hobby. Aside from the occasional prints perhaps, there are few other necessary costs to the hobby when approached from the digital side of things.

There are literally thousands of enthusiast sites and hundreds of free tools to assist the leisure photographer. Such digital tools include sites to meta-organize digital photos, like Flickr (www.flickr.com), web gallery software such as Coppermine (www.coppermine.com), and image editing tools like the Gimp (www.gimp.com).

Annual sales of digital cameras are approximately $6 billion.

46.3 Retail Sector

According to Camera & Photographic Supplies Stores Industry Profile, a 2014 report by First Research (www.firstresearch.com), the camera and photographic supplies retail sector includes about 800 companies with combined annual revenue of more than $3 billion. The sector is concentrated: the 50 largest companies account for
more than 80% of the market. Major companies include Calumet Photographic, Ritz Camera & Image, and Samy’s Camera. Major competitors are big-box retailers, like Walmart and Target, and electronics superstores such as Best Buy. Photo kiosks and mini-labs are also found in many major drugstore chains. Digital photography has had a major impact on the industry.

46.4 Market Resources

Photo Marketing Association (PMA), 2282 Springport Road, Suite F, Jackson, MI 49202. (517) 788-8100. ([www.pmai.org](http://www.pmai.org))
Country clubs are private clubs generally with a closed membership. Most are located in city outskirts or rural areas and offer a variety of recreational sports facilities, like golf, swimming, and tennis. Clubs typically provide hospitality to members and guests, such as a restaurant and bar, and some provide facilities for host-catered events, such as weddings. Initiation fees at country clubs can exceed $100,000 at exclusive clubs. There are approximately 4,400 country clubs in the United States.

According to the National Golf Foundation (www.ngf.org), approximately 2.1 million golfers belong to private clubs, a decline from a peak membership of about 3 million in the mid-1990s.

There are approximately 220 city clubs in the United States. Very similar to country clubs, city clubs are mostly located in downtown or urban areas. As such, they generally do not offer golf facilities, and most activities center around social culture and dining. Most major U.S. cities have at least one city club. City clubs are most predominant in older cities on the East Coast. With 26 clubs, New York City has more city clubs than any other U.S. city. Boston and Cambridge, Massachusetts, have 15 city clubs; Washington, D.C., has eight.


The following are some of the most prominent and exclusive country clubs in the United States:

- Augusta National Golf Club (Augusta, GA)
- Bighorn Golf Club (Palm Desert, CA)
- Cherokee Town & Country Club (Atlanta, GA)
- Hillcrest Country Club (Los Angeles, CA)
- Loblolly Pines Golf Club (Hobe Sound, FL)
- Locust Hill Country Club (Rochester, NY)
- Oakmont Country Club (Oakmont, PA)
- Pine Valley Golf Club (Pine Valley, NJ)
- Riviera Country Club (Los Angeles, CA)
- Round Hill Club (Greenwich, CT)
• Sherwood Country Club (Thousand Oaks, CA)
• Shinnecock Hills Golf Club (Southampton, NY)

The most prominent city clubs include the following:
• The A.D. Club (Cambridge, MA; founded 1836)
• The Alta Club (Salt Lake City; founded 1883)
• The Arizona Club (Phoenix; founded 1894)
• The Arlington Club (Portland, OR; founded 1867)
• The Army and Navy Club (Washington, DC; founded 1885)
• The Bohemian Club (San Francisco; founded 1872)
• The Capitol City Club (Atlanta; founded 1883)
• The Capitol Hill Club (Washington, DC; founded 1951)
• The Century Club (Syracuse; founded 1876)
• The Charleston Club (South Carolina; founded 1852)
• The Chicago Club (founded 1869)
• The Cincinnati Athletic Club (founded 1853)
• The Colony Club (New York, NY; founded 1903), exclusively for women
• The Concordia Club (Birmingham, AL; founded 1886)
• The Cosmopolitan Club (New York, NY; founded 1909), exclusively for women
• The Cosmopolitan Club of Philadelphia (founded 1928)
• The Detroit Athletic Club (founded 1887)
• The Duquesne Club (Pittsburgh; founded 1873)
• The Graduate Club (New Haven, CT; founded 1892)
• The Harmonie Club (New York, NY; founded 1852)
• The Harvard Club (Boston; founded 1908)
• The Harvard Club of New York (founded 1887)
• The Kansas City Club (founded 1882)
• The Knickerbocker Club (New York, NY; founded 1871)
• The Los Angeles Athletic Club (founded 1880)
• The Lotos Club (New York, NY; founded 1870)
• The Metropolitan Club (Washington, DC; founded 1863)
• The Milwaukee Athletic Club (founded 1882)
• The Nassau Club (Princeton; founded 1889)
• The National Press Club (Washington, DC; founded 1908)
• The New York Athletic Club (New York, NY; founded 1868)
• The New York Yacht Club (New York, NY; founded 1844)
• The Newport Reading Room (Newport, RI; founded 1854)
• The Old Colony Club (Plymouth, MA; founded 1769)
• The Pacific Club (Honolulu; founded 1851)
• The Pacific-Union Club (San Francisco; founded 1852)
• The Pendennis Club (Louisville; founded 1881)
• The Penn Club of New York, NY (founded 1901)
• The Philadelphia Club (founded 1834)
• The Piedmont Driving Club (Atlanta; founded 1887)
• The Pittsburgh Athletic Association (founded 1908)
• The Princeton Club of New York (founded 1899)
• The Racquet and Tennis Club (New York, NY; founded 1876)
• The Rainier Club (Seattle; founded 1888)
• The Standard Club (Chicago; founded 1869)
• The Union Boat Club (Boston; founded 1851)
• The Union Club (New York, NY; founded 1836)
• The Union League Club of New York (New York, NY; founded 1863)
• The Union League of Philadelphia (founded 1862)
• The Union Club (Cleveland; founded 1866)
• The University and Whist Club (Wilmington, DE; founded 1891)
• The University Club of Indianapolis (founded 1893)
• The University Club of New York (New York, NY; founded 1865)
• The Yale Club of New York, NY (founded 1897)
• Virginia Club (Norfolk; founded 1873)

47.3 Market Resources

48

RUNNING

48.1 Overview

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 54.1 million people run or jog as a fitness activity at least once a year – 24.3 million are casual participants (<50 times per year) and 29.8 million are core participants (>50 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>17.8 million</td>
<td>23.8 million</td>
</tr>
<tr>
<td>2009</td>
<td>18.0 million</td>
<td>24.5 million</td>
</tr>
<tr>
<td>2010</td>
<td>20.0 million</td>
<td>26.6 million</td>
</tr>
<tr>
<td>2011</td>
<td>21.4 million</td>
<td>28.7 million</td>
</tr>
<tr>
<td>2012</td>
<td>12.0 million</td>
<td>29.5 million</td>
</tr>
<tr>
<td>2013</td>
<td>24.3 million</td>
<td>29.8 million</td>
</tr>
</tbody>
</table>

Among those who participate in organized running activities, marathons and triathlons are most popular.

48.2 Marathons

According to Running USA (www.runningusa.org), since 1997 the number of marathons has grown 29% to 400; participation is up 31% to 410,000. The number of half-marathon runners in that time period soared 63% to 590,000.

According to Running USA, the following are the largest marathon races in 2012 (most recent data available), ranked by number of finishers:

- Atlanta Journal-Constitution Peachtree Road Race 10K (Atlanta, GA): 58,043
- Lilac Bloomsday Run 12K (Spokane, WA): 48,229
- Dick’s Sporting Goods Bolder 10K (Boulder, CO): 47,925
- Bank of America Chicago Marathon (Chicago, IL): 37,475
- Cooper River Bridge Run 10K (Charleston, SC): 36,755
- Bank of America Shamrock Shuffle 8K (Chicago, IL): 34,369
- Blue Cross Broad Street Run 10 Mile (Philadelphia, PA): 34,068
- Ukrop’s Monument Avenue 10K (Richmond, VA): 33,329
- OneAmerica 500 Festival Half-Marathon (Indianapolis, IN): 31,170
- Marine Corps Marathon (Washington, DC): 23,519
- Pat’s Run 4.2 Mile (Tempe, AZ): 23,448
David Moross, CEO at Falconhead Capital (www.falconheadcapital.com), estimates that participants at major marathon events have an average household income of $160,000.
48.3 Triathlons

A triathlon is a racing event consisting of swimming, cycling, and running components over various distances. Triathlon has grown significantly in recent years and now includes thousands of races with hundreds of thousands of competitors worldwide.

At year-end 2013, USA Triathlon (www.usatriathlon.org) had 950 local clubs with more than 165,000 members.

An estimated 2.5 million people complete a triathlon each year. Over 3,500 sanctioned races were scheduled in 2014.

The sport attracts a disproportionate share of entrepreneurs, executives, physicians, and attorneys, many with a willingness to spend thousands of dollars annually on entry fees, travel, and top-of-the-line equipment and training. Average income among athletes competing in the 22 official Ironman events: nearly $160,000.

“No participatory sport in the country comes close to this demographic. Yachting and equestrian might exceed us by a few dollars.”

Murphy Reinschreiber, Sports Agent
Sports Business Journal

The World Triathlon Corporation (www.ironman.com) sanctions and organizes a series of Ironman and Ironman 70.3 distance races each year. These races serve as qualifying events for the World Championship, held annually in Kailua-Kona, Hawaii (October), and the Ironman World Championship 70.3 in Clearwater, Florida (November). In 2014, GoPro Cameras began title sponsorship of the Ironman World Championship.

Sales of licensed Ironman products are $500 million annually, according to SportsBusiness Journal.

The Life Time Fitness Triathlon (www.ltftriathlon.com) hosts the Toyota Triple Crown Series which consists of three events, as follows:
• Life Time Tri Minneapolis (July 12, 2014)
• New York City Triathlon (August 3, 2014)
• Life Time Tri Oceanside (October 26, 2014)

In addition to the Ironman events and Life Time Fitness Series, the following are other major triathlon events:
• **Avia Wildflower Triathlon** (www.tricalifornia.com), a Half-Ironman distance race held on or near May 1st at Lake San Antonio in Southern California, has been held
since 1983. Known for a particularly hilly course, it has expanded to include three races of different lengths. It is one of the largest triathlon events in the world, with over 8,000 athletes competing each year.

- **Iron Girl** ([www.irongirl.com](http://www.irongirl.com)) has grown to now include 9 events nationwide, varying in distance from 5K, 10K, ½ marathon, and triathlon. The following are 2014 events:
  - April 13: Clearwater Half Marathon & 5K
  - April 27: Columbia Half Marathon
  - July 20: Webster Sprint Triathlon
  - August 3: Syracuse Sprint Triathlon
  - August 10: Pleasant Prairie Sprint Triathlon
  - August 17: Seattle Sprint Triathlon
  - August 17: Columbia Sprint Triathlon
  - September 7: Sandy Hook Sprint Triathlon
  - September 7: Rocky Gap Sprint Triathlon

- **Escape from Alcatraz** ([www.escapefromalcatraztriathlon.com](http://www.escapefromalcatraztriathlon.com)) is a non-standard-length race that begins with a 1.5 mile swim in frigid San Francisco Bay waters from Alcatraz Island to shore, followed by an 18-mile bicycle and eight-mile run in the extremely hilly terrain of the San Francisco Bay area. The run includes the notorious Sand Ladder – a 400-step staircase climb up a beachside cliff. The 34th Escape from Alcatraz Triathlon was held June 1, 2014.

- **St. Anthony’s Triathlon** ([www.satriathlon.com](http://www.satriathlon.com)) attracts more than 4,000 competitors and is viewed by many as the kickoff to the triathlon season. The April 25-27, 2014 event was the 31st annual.

### 48.4 Parkour and Freerunning

Parkour, a word derived from the French word for obstacle course, is a combination of gymnastics and running where the aim is to overcome obstacles – from branches and rocks to rails and concrete walls – getting to a destination. Originally developed in France, the main purpose of parkour is to teach participants how to move through their environment by vaulting, rolling, running, climbing, and jumping. Parkour practitioners are known as traceurs.

Freerunning, where participants use the city and rural landscape to perform movements through its structures, is similar to parkour. The distinction is that parkour emphasis on efficiency while freerunning places more emphasis on freedom of movement and creativity.

The popularity of parkour is evident from the high number of online video views. There were 111.2 million views of parkour videos and 68.0 million views of freerunning videos on YouTube in 2013. The World’s Best Parkour and Freerunning ([www.youtube.com/watch?v=nx7qwegcnI](http://www.youtube.com/watch?v=nx7qwegcnI)), posted in 2012, had over 47.3 million views.
as of August 2014.

The popularity of parkour has increased significantly in the United States within the past few years and the activity is immensely popular on some college campuses. There are over 100 organized parkour groups at U.S. colleges; a blog by the American Parkour (www.americanparkour.com/smf/index.php/board.144.0.html) links these communities.

48.5 Market Resources
American Parkour Academy, 219 M Street NW, Washington, DC 20001. (www.americanparkour.com)

Running USA, P.O. Box 1988, Colorado Springs, CO 80901. (719) 434-2575. (www.runningusa.org)

USA Triathlon, 5825 Delmonico Drive, Suite 200, Colorado Springs, CO 80919. (719) 597-9090. (www.usatriathlon.org)
49.1 Astronomy

About one million adults consider themselves to be amateur astronomers, or backyard astronomers, a group who frequently watches the night sky as a hobby. Amateur astronomers are attracted to the moon, planets, stars, comets, meteor showers, and a variety of deep sky objects such as star clusters, galaxies, and nebulae. Some amateur astronomers enjoy satellite spotting.

There are many amateur astronomical societies across the United States serving as a meeting point for those interested in astronomy, whether they be people who are actively interested in observing or “armchair astronomers” who may be simply interested in the topic. Hampered by light pollution, city-based organizations typically focus less on observing the local night sky than on having regular meetings with speakers and organizing observational field trips.

Approximately 20 million people visit planetariums each year, according to the International Planetarium Society (www.ips-planetarium.org). Slightly more than 50% of the world’s planetariums are located in North America. Approximately 33% of these planetariums are located in primary or secondary schools; 17% are at colleges and universities; 15% are part of museums and science centers; 7% are associated with observatories or other institutions; the locales of the remaining 27% vary.

A list of prominent planetariums is available at www.rkma.com/leisure.planetariums.pdf.

The International Dark-Sky Association (www.darksky.org) has identified locations worldwide for their pristine nighttime beauty. The following are designated Dark-Sky Communities and Parks in the United States:

**Communities**
- Borrego Springs, CA
- Flagstaff, AZ
- Homer Glenn, IL

**Parks**
- Big Bend National Park (Texas)
- Cherry Springs State Park (Pennsylvania)
- Clayton Lake State Park (New Mexico)
- Goldendale Observatory Park (Washington)
- Natural Bridges National Monument (Utah)
- Observatory Park (Ohio)
- The Headlands (Michigan)
49.2 Science Centers

Science centers are science museums that emphasize a hands-on approach, featuring interactive exhibits that encourage visitors to experiment and explore.

The most-visited science centers are as follows (sources: Forbes, Travel + Leisure, and museum websites):

- Museum of Science (Boston, MA; www.mos.org): 1.6 million
- Museum of Science and Industry (Chicago, IL; www.msichicago.org): 1.6 million
- Pacific Science Center (Seattle, WA; www.pacificsciencecenter.org): 1.6 million
- California Science Center (Los Angeles, CA; www.californiasciencecenter.org): 1.4 million
- Saint Louis Science Center (St. Louis, MO; www.slsc.org): 1.4 million
- Science Museum of Minnesota (Minneapolis, MN; www.smm.org): 900,000
- The Franklin Institute (Philadelphia, PA; www.fi.edu): 890,000
- Liberty Science Center (Jersey City, NJ; http://lsc.org): 866,000
- Fernbank Science Center (Atlanta, GA; www.fernbank.edu): 865,000
- California Academy of Sciences (San Francisco, CA; www.calacademy.org): 882,000
- Exploratorium (San Francisco, CA; www.exploratorium.edu): 600,000
- Reuben H. Fleet Science Center (San Diego, CA; www.rhfleet.org): 550,000

The following are online directories of science centers:

- www.cs.cmu.edu/~mwm/sci.html

49.3 Satellite Spotting

A surprisingly large number of people track satellites as a hobby. Spotters, as they call themselves, use binoculars and telescopes to locate satellites in the night sky, then map each one by calculating its path and speed. The hobby calls for long hours outdoors, patience and, for the adept, lots of math.

Spotters communicate through an email network, SeeSat-L, and share findings through websites such as galaxypix.com and satobs.org.
“Thousands of people form the spotter community. Many look for historical relics of the early space age, working from publicly available orbital information. Others watch for phenomena like the distinctive flare of sunlight glinting off bright solar panels of some telephone satellites. Still others are drawn to the secretive world of spy satellites.”

*The New York Times*

Spotters abound in knowledge about classified military reconnaissance missions and space missions. Some private groups, such as GlobalSecurity.org, even specialize in military and space activities. But, as one spotter puts it, “We are not nerdy buffs who lie on our backs and look into the sky and try to undermine governments. Spotting is simply a hobby.”

**49.4 Gem Hunting and Rock Collecting**

While rocks, gems, and minerals are collected across the U.S., ‘rockhounding,’ as collecting is called by those in the hobby, is especially popular in Western North Carolina and the region spanning New Mexico, Arizona, and Southern California. There are numerous clubs and organizations in most every region. Near Asheville, North Carolina, members of a rockhounding club called M.A.G.M.A. (Mountain Area Gem and Mineral Association, www.wncrocks.com) go on gem hunting trips almost every weekend.

Among the books for gem and rock collectors, *Rockhounding California* (Falcon Books, second edition) by Gail Butler, provides maps, directions, and descriptions of 75 of the state’s best sites for rockhounding – from popular public and commercial areas to some great, lesser known areas to dig. The book also lists area clubs throughout the state.
“California is a rock collecting/gem hunting paradise from the rich deserts to sun drenched beaches.”

Gail Butler, Author
Rockhounding California

Crater of Diamonds State Park (www.craterofdiamondsstatepark.com), near Murfreesboro, Arkansas, is the only public diamond mine in the world. The park is the site of the former farm where John Huddleston found two diamonds in 1906, sparking a hysteria known as “diamond fever.” Visitors to the park can search a 37-acre plowed field – the eroded surface of an ancient, gem-bearing volcanic pipe – and they keep their finds. About 60,000 people annually visit Huddleston’s old farm site; over 75,000 diamonds have reportedly been unearthed there.

49.3 Raising Birds, Fish and Reptiles

Engaging with wildlife is a favorite leisure activity. Over 70 million people observe, feed, or photograph wildlife or birds (see Chapter 62), and there are over 175 visits to zoos and aquariums (see Chapter 64) each year. Many people go beyond observing wildlife and raise birds, fish, reptiles, or small animals in their home.

The 2013 National Pet Owners Survey, published by the American Pet Products Association (APPA, www.americanpetproducts.org), reports the number of U.S. households that raise various animals, birds, and fish as follows:

- Freshwater fish: 11.9 million
- Birds: 5.7 million
- Small animals: 5.0 million
- Reptiles: 4.6 million
- Saltwater fish: 0.7 million

49.6 Market Resources

Association of Science-Technology Centers (ASTC), 818 Connecticut Avenue NW, 7th Floor, Washington, DC 20006. (202) 783-7200. (www.astc.org)

Center for Science in the Public Interest, 1220 L Street NW, Suite 300, Washington, DC 20005. (202) 332-9110. (www.cspinet.org)
International Dark-Sky Association, 3223 N. First Avenue, Tucson, AZ 85719.  (520) 293-3198.  (www.darksky.org)

International Planetarium Society, 7714 Lookout Court, Alexandria, VA 22306.  (www.ips-planetarium.org)
50

SOCIAL ORGANIZATIONS & SERVICE CLUBS

50.1 Overview
For millions of American adults, an important part of their life centers around activities of a social organization or service club to which they belong. Large and small, there are several hundred such groups throughout the country. This chapter profiles some of the larger organizations.

50.2 Profiles of Major Organizations

Elks
- With more than one million members in more than 2,100 local lodges nationwide, the Elks (www.elks.org) is one of the largest and most active fraternal organizations in the U.S.
- Like other fraternal organizations, the Elks have struggled with massive decline in membership. The Elks, whose average member is 65, has lost 600,000 members since 1980; overall, the Elks loses about 19,000 members a year. But a youthful burst in membership is helping to stem annual losses and revitalize faltering lodges. At Lodge 74 in Hoboken, New Jersey, for example, officials estimate that 70% of their 468 members are under 40. At the nation’s oldest operating lodge, Lodge 3 in San Francisco, 600 of the 800 members are under 40. In Austin, so many young professionals have joined Lodge 201 that membership more than doubled from 210 to 460 in less than two years.
- Elk lodges offer camaraderie, cheap beer, private party rooms, and free parking in otherwise overcrowded urban centers – all for an average cost of less than $100 a year in membership dues. Young members say they like the myriad of volunteer and community events sponsored by lodges, and the idea that the money they spend on beer supports a charitable organization that hands out more than $3 million a year nationwide in college scholarships.

Kiwanis International
- Kiwanis International (http://sites.kiwanis.org) is an international service club founded in 1915. It comprises approximately 8,000 clubs in 96 countries with over 260,000 adult members. Membership peaked in 1992 at almost 325,000 members and has declined about 5% per year since.
- Kiwanis is striving to adjust to changing member lifestyles by creating cyberclubs
that conduct business strictly on the Internet and family clubs to involve parents and children. Pancake breakfasts and spaghetti dinners are being replaced by early-morning meetings at Starbucks and happy-hour gatherings at local pubs to adjust to young professionals’ work schedules.

“We are reinventing ourselves. We’re trying to make it fit in to [members’] lifestyles. We’re making it more flexible and more available.”

Rob Parker, CEO
Kiwanis International

Lions Clubs International
• Lions Clubs International (www.lionsclubs.org) is a service organization with over 44,500 clubs and more than 1.3 million members in 203 countries around the world. There are about 400,000 members in the U.S.
• Founded in the early 1900s by businessmen who wanted to create a social and professional network, groups have expanded to focus on humanitarian causes and now work to fight hunger, disease, and homelessness worldwide.
• The Lions has chartered dozens of new family clubs. Women are the fastest-growing segment of its membership, making up about 22% of members worldwide.

“Survey after survey that we’ve conducted have indicated that people still want to volunteer like we did in the ’50s and ’60s, but people want to volunteer with their families and their kids. People want to volunteer, but they want to get their hands dirty. They want to build houses and playgrounds.”

Dane LaJoye, Manager Public Relations
Lions Clubs International
Red Hat Society

- The Red Hat Society (www.redhatsociety.org), a social organization geared to women over 50, has seen unprecedented growth since its formation in 1998. While thousands of articles about it have been published in regional newspapers and national magazines, the Red Hat Society has grown primarily by word-of-mouth. The Red Hat Society now has an estimated one million members in more than 41,000 chapters.
- Local chapters, averaging 20 to 25 members, are the core of the organization. Each chapter plans events according to their membership and chapter size, including tea parties, pajama parties, luncheons, field trips to plays, steamboats, shopping destinations, and more. At meetings and events, Red Hatters always wear the society’s trademark red hat and purple outfit. Women under 50 are welcome too, but their uniform is different: pink headwear and lavender garb. For a $35 annual fee, any group of women can start and register a chapter with the organization’s “Hatquarters.”
- The organization has spawned a multi-million dollar business among boutiques that sell red hats and their memorabilia to members. Except for the generic red hat, branded merchandise must be licensed by the parent organization.

Rotary Clubs

- Rotary International (www.rotary.org), an organization of service clubs known as Rotary Clubs, had a peak U.S. membership of 421,953 in 1993. Membership has been below 400,000 since 1999. There are more than 32,000 clubs and over 1.2 million members worldwide.
- Rotary Clubs’ purpose is to bring together business and professional leaders to provide humanitarian service, encourage high ethical standards in all vocations, and help build goodwill and peace throughout the world.
- Members usually meet weekly for a social event. Mindful of members' limited time for such activities, clubs are testing less frequent meeting schedules and e-clubs that allow members to meet online.

Veterans of Foreign Wars

- The Veterans of Foreign Wars (VFW, www.vfw.org), the largest organization of combat veterans in the United States, has 7,500 posts with 1.6 million members. Most members are men ages 60 and older.
- Several posts are making efforts to attract young men and women who served as part of Operation Desert Storm and Operation Iraqi Freedom. One example is VFW Post 12097 in Buffalo, New York, where 40 of the 49 members are women.

Women’s Clubs

- Local women’s clubs are dedicated to strengthening their communities and enhancing the lives of others through volunteer service. Activities focus on supporting the arts, preserving natural resources, advancing education, promoting
healthy lifestyles, encouraging civic involvement, working toward world peace and understanding, and more.

• There are affiliated clubs in every state with a combined membership of over 100,000 women.
• The General Federation of Women’s Clubs (www.gfwc.org) coordinates activities of local clubs and hosts an annual convention.

50.3 Market Resources
Elks, 2750 North Lakeview Avenue, Chicago, IL 60614. (773) 755-4700. (www.elks.org)

General Federation of Women’s Clubs, 1734 N Street NW, Washington, DC 20036. (202) 347-3168. (www.gfwc.org)

Kiwanis International, 3636 Woodview Trace, Indianapolis, IN 46268. (800) 549-2647. (www.kiwanis.org)

Lions Clubs International, 300 West 22nd Street, Oak Brook, IL 60523. (630) 571-5466. (www.lionsclubs.org)

Red Hat Society, 431 S. Acacia Avenue, Fullerton, CA 92831. (866) 386-2850. (www.redhatsociety.org)

Rotary International, One Rotary Center, 1560 Sherman Avenue, Evanston, IL 60201. (866) 976-8279. (www.rotary.org)

Veterans of Foreign Wars, 406 W. 34th Street, Kansas City, MO 64111. (816) 756-3390. (www.vfw.org)
51

SPAS

51.1 Spa Visits and Spending
According to the International Spa Association (www.experienceispa.com), there were 20,180 spas in the United States at year-end 2013. There were 164 million spa visits in 2013; total spending was $14.7 billion.

The spa industry has experienced strong growth during the past decade. In 1999, there were 5,700 spas and 91 million visits were made to spas.

Worldwide, the industry includes about 87,000 spas that generate about $75 billion in annual revenue, according to SRI International (www.sri.com). Europe accounts for about a third of global locations and about 40% of worldwide revenue.

51.2 Local Spas
The bulk of spa visits are to day spas. Day spas provide a variety of services for improving health, beauty, and relaxation through personal care treatments such as massages and facials. They offer facilities like a sauna, pool, steam room, and whirlpool that guests may use in addition to their treatment.

The day spa segment is surprisingly fragmented. While there are over 100 spa chain operators, most chains are regional and there is not a dominant market leader.

According to Liz Mazurski, editor-in-chief of Spa magazine, spas within health clubs are a growing trend. Gold’s Gym, which has 620 locations, is rolling out spas. The Sports Club Co., which has locations in Los Angeles, Boston, New York City, and San Francisco, also has its own line of spas, called Splash, which are open to non-members as well.

Until recently, the most comprehensive spas facilities were ‘destination spas,’ where guests typically stay for a week or longer. Bringing similar programs to cities across the U.S. are urban “destination-day-spas” which provide comprehensive programs that includes spa services, physical fitness activities, wellness education, healthy cuisine, and special interest programming. Programs typically include diet, exercise programs, instruction on wellness, life coaching, yoga, and more.
“You can feel an Urban Destination Day Spa model percolating, where more comprehensive, deeper approaches to an individual’s total health self could get continuously supported beyond the gym membership or occasional massage. You shouldn’t have to fly afar for an integrated spa experience.”

2014 Trend Report
Spafinder

51.3 Market Resources

International Spa Association, 2365 Harrodsburg Road, Suite A325, Lexington, KY 40504. (859) 226.4326. (www.experienceispa.com)


Spafinder, 257 Park Avenue South, Floor 10, New York, NY 10010. (212) 924-6800. (www.spafinder.com)

The following links to a list of award-winning spas: www.rkma.com/spas.pdf.
52 SPECTATOR SPORTS

52.1 Sports Fans

In a recent Gallup Poll (www.gallup.com), 54% of respondents said they were sports fans. In the survey, watching sports ranked ahead of casino gaming, crafts, gardening, hobby collecting, performing arts, pets, video games, and wildlife watching.

According to a December 2013 survey by the Marist College Institute for Public Opinion (www.maristpoll.marist.edu), 55% of U.S. adults say they are sports fans. The following is a demographic profile of sports fans (percentage of respondents who say they are fans):

Gender
• Female: 46%
• Male: 65%

Age
• 18-to-29: 49%
• 30-to-44: 53%
• 45-to-59: 62%
• 60 and older: 54%

Income
• Less than $50,000: 49%
• More than $50,000: 62%

Region
• Northeast: 56%
• Midwest: 56%
• South: 60%
• West: 47%

Education
• Not college graduate: 56%
• College graduate: 54%
## 52.2 Favorite Sports

According to a December 2013 Harris Poll (www.harrisinteractive.com), favorite sports among adults (age 18 and older) are as follows (results of 2004 and 2011 surveys by Harris Interactive are presented for comparison):

<table>
<thead>
<tr>
<th>Sport</th>
<th>2013</th>
<th>2011</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional football</td>
<td>35%</td>
<td>36%</td>
<td>30%</td>
</tr>
<tr>
<td>Baseball</td>
<td>14%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>College football</td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Auto racing</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Men's professional basketball</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Hockey</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Men's college basketball</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Men's golf</td>
<td>2%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Men's soccer</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Swimming</td>
<td>2%</td>
<td>2%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Boxing</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Men's tennis</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Bowling</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Horse racing</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Track and field</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Women's tennis</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Women's college basketball</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

According to an ESPN Sports Poll, the following percentages of adults say they are fans or avid followers* of the sports leagues:

<table>
<thead>
<tr>
<th>Sport</th>
<th>Fan</th>
<th>Avid Fan</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Football League (NFL)</td>
<td>66%</td>
<td>32%</td>
</tr>
<tr>
<td>NCAA Football</td>
<td>58%</td>
<td>23%</td>
</tr>
<tr>
<td>Major League Baseball (MLB)</td>
<td>57%</td>
<td>19%</td>
</tr>
<tr>
<td>NCAA Basketball</td>
<td>48%</td>
<td>16%</td>
</tr>
<tr>
<td>National Basketball Association (NBA)</td>
<td>48%</td>
<td>16%</td>
</tr>
<tr>
<td>Extreme/action sports</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Figure skating</td>
<td>45%</td>
<td>10%</td>
</tr>
<tr>
<td>Boxing</td>
<td>37%</td>
<td>10%</td>
</tr>
<tr>
<td>Mixed martial arts</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>NASCAR</td>
<td>36%</td>
<td>11%</td>
</tr>
<tr>
<td>National Hockey League (NHL)</td>
<td>35%</td>
<td>8%</td>
</tr>
<tr>
<td>PGA Tour (golf)</td>
<td>33%</td>
<td>8%</td>
</tr>
<tr>
<td>Horse racing</td>
<td>30%</td>
<td>5%</td>
</tr>
<tr>
<td>Women’s Tennis Association Tour (WTA)</td>
<td>30%</td>
<td>5%</td>
</tr>
<tr>
<td>Women’s National Basketball Association (WNBA)</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>Major League Soccer (MLS)</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Association of Tennis Professionals Tour (ATP)</td>
<td>29%</td>
<td>4%</td>
</tr>
<tr>
<td>Pro wrestling</td>
<td>21%</td>
<td>6%</td>
</tr>
</tbody>
</table>

* A fan has some interest in the sport; an avid fan is very interested
52.3 Major Events

Major sports events such as the Super Bowl, NCAA Basketball Finals, World Series, NBA Finals, and Kentucky Derby are followed by a majority of the U.S. population. Super Bowl, with over 110 million viewers in the U.S., is the top at-home party event of the year, even surpassing New Year’s Eve.

In a 2013 reader poll by SportsBusiness Journal, sports fans said they would most like to attend the following sports events in person:

- Super Bowl
- The Masters
- Summer Olympics
- FIFA World Cup
- NCAA Final Four
- Kentucky Derby
- World Series

The Marketing Arm (www.themarketingarm.com) ranked major events using a Passion Score based on avidity, appeal, and excitement. The following events have the highest Passion Score:

- Super Bowl: 68.10
- NCAA Final Four: 63.14
- MLB All-Star Game: 61.95
- World Series: 61.90
- NBA Finals: 61.75
- Pro Bowl: 60.82
- Stanley Cup Final: 60.11
- Rose Bowl: 60.02
- Tostitos Fiesta Bowl: 58.71
- NBA All-Star Game: 58.23

52.4 Avid Sports Fans City-by-City

Scarborough Sports Marketing (www.scarborough.com) performs surveys in 81 metropolitan areas asking about 29 major spectator sports. The following are percentages of adults in each city that said they are avid fans of at least one major sport:

- Columbus, OH: 66%
- Boston, MA: 64%
- Buffalo, NY: 63%
- Pittsburgh, PA: 63%
- Green Bay/Appleton, WI: 62%
- Providence/New Bedford, RI: 62%
- Denver, CO: 62%
• Rochester, NY: 62%
• Louisville, KY: 62%
• Cleveland/Akron, OH: 62%
• San Antonio, TX: 62%
• Birmingham, AL: 62%
• Spokane, WA: 61%
• Dayton, OH: 61%
• Jacksonville, FL: 61%
• Indianapolis, IN: 61%
• Albany/Schenectady/Troy, NY: 60%
• Oklahoma City, OK: 60%
• Lexington, KY: 60%
• Flint/Saginaw/Bay City, MI: 60%
• Toledo, OH: 60%
• Colorado Springs/Pueblo, CO: 60%
• Mobile, Alabama/Pensacola, FL: 60%
• Detroit, MI: 60%
• Dallas/Ft. Worth, TX: 59%
• Greensboro/High Point/Winston-Salem, NC: 59%
• Norfolk/Portsmouth/Newport News, VA: 59%
• Minneapolis/Saint Paul, MN: 59%
• Washington, DC: 59%
• St. Louis, MO: 59%
• Roanoke/Lynchburg, VA: 59%
• Des Moines/Ames, IA: 59%
• Tampa/St. Petersburg, FL: 58%
• Tulsa, OK: 58%
• Philadelphia, PA: 58%
• Charlotte, NC: 58%
• Milwaukee, WI: 58%
• Las Vegas, NV: 58%
• Seattle/Tacoma, WA: 58%
• Albuquerque/Santa Fe, NM: 57%
• Hartford/New Haven, CT: 57%
• Chicago, IL: 57%
• Salt Lake City, UT: 57%
• New Orleans, LA: 57%
• Baltimore, MD: 57%
• Knoxville, TN: 57%
• Cincinnati, OH: 57%
• Nashville, TN: 57%
• Kansas City, MO: 57%
• Richmond/Petersburg, VA: 57%
• Greenville/Spartanburg/Anderson, NC: 57%
Of all 81 metropolitan areas surveyed by Scarborough, 56% of residents said they are avid sports fans.

52.5 Attending Spectator Sports Events

According to International Demographics (www.themediaaudit.com), the following metropolitan areas have the highest percentages of adults that attend one or more professional or college sports events annually:

- Omaha, NE: 33.3%
- Madison, WI: 30.6%
- Birmingham, AL: 29.7%
- Grand Rapids, MI: 29.5%
- Lexington, KY: 29.2%
Among all adults living in metropolitan areas, 21.5% attend three or more professional or college sports events annually.

Data on sports event attendance in 93 metropolitan areas is available online at www.themediaaudit.com/press/local-releases.

52.6 Market Resources

### 53.1 Aerobics, Conditioning and Strength

According to the 2014 *Sports, Fitness and Leisure Participation Topline Report*, published by the Sports & Fitness Industry Association (SFIA, [www.sfia.org](http://www.sfia.org)), casual participation (one-to-49 times) among those ages six and older and core participation (50 or more times) in aerobics, conditioning, and strength activities in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abdominal machine/device</td>
<td>7.9 million (0%)</td>
<td>10.5 million (-3%)</td>
</tr>
<tr>
<td>Aerobics (low impact)</td>
<td>11.9 million (3%)</td>
<td>13.1 million (0%)</td>
</tr>
<tr>
<td>Aerobics (step)</td>
<td>5.3 million (0%)</td>
<td>3.6 million (-2%)</td>
</tr>
<tr>
<td>Aerobics (high impact)</td>
<td>9.0 million (11%)</td>
<td>8.3 million (6%)</td>
</tr>
<tr>
<td>Aquatic exercise</td>
<td>5.3 million (-2%)</td>
<td>3.3 million (-2%)</td>
</tr>
<tr>
<td>Barre</td>
<td>2.3 million (n/a)</td>
<td>625,000 (n/a)</td>
</tr>
<tr>
<td>Boot camp style cross-training</td>
<td>4.5 million (n/a)</td>
<td>2.4 million (n/a)</td>
</tr>
<tr>
<td>Calisthenics/bodyweight training</td>
<td>3.8 million (n/a)</td>
<td>6.8 million (n/a)</td>
</tr>
<tr>
<td>Cardio cross trainer</td>
<td>2.7 million (n/a)</td>
<td>2.7 million (n/a)</td>
</tr>
<tr>
<td>Cardio kickboxing</td>
<td>4.1 million (6%)</td>
<td>2.2 million (5%)</td>
</tr>
<tr>
<td>Elliptical motion trainer</td>
<td>13.4 million (4%)</td>
<td>13.7 million (1%)</td>
</tr>
<tr>
<td>Free weights (barbells)</td>
<td>9.6 million (3%)</td>
<td>16.0 million (-2%)</td>
</tr>
<tr>
<td>Free weights (dumbbells)</td>
<td>11.6 million (n/a)</td>
<td>20.6 million (n/a)</td>
</tr>
<tr>
<td>Free weights (hand weights)</td>
<td>17.5 million (n/a)</td>
<td>25.7 million (n/a)</td>
</tr>
<tr>
<td>Home gym exercise</td>
<td>10.7 million (2%)</td>
<td>14.8 million (-1%)</td>
</tr>
<tr>
<td>Other exercise to music</td>
<td>12.3 million (5%)</td>
<td>11.2 million (-2%)</td>
</tr>
<tr>
<td>Pilates training</td>
<td>4.8 million (-2%)</td>
<td>3.3 million (-3%)</td>
</tr>
<tr>
<td>Rowing machine</td>
<td>5.7 million (4%)</td>
<td>4.4 million (1%)</td>
</tr>
<tr>
<td>Running/jogging</td>
<td>24.3 million (7%)</td>
<td>29.8 million (5%)</td>
</tr>
<tr>
<td>Stair climbing machine</td>
<td>7.4 million (-1%)</td>
<td>5.3 million (-4%)</td>
</tr>
<tr>
<td>Stationary cycling (group)</td>
<td>5.3 million (8%)</td>
<td>3.1 million (2%)</td>
</tr>
<tr>
<td>Stationary cycling (recumbent)</td>
<td>5.9 million (1%)</td>
<td>5.3 million (-1%)</td>
</tr>
<tr>
<td>Stationary cycling (upright)</td>
<td>12.4 million (1%)</td>
<td>11.7 million (-2%)</td>
</tr>
<tr>
<td>Stretching</td>
<td>9.7 million (4%)</td>
<td>26.5 million (-1%)</td>
</tr>
<tr>
<td>Swimming for fitness</td>
<td>16.9 million (n/a)</td>
<td>9.4 million (n/a)</td>
</tr>
<tr>
<td>Tai Chi</td>
<td>2.0 million (2%)</td>
<td>1.4 million (-2%)</td>
</tr>
<tr>
<td>Treadmill</td>
<td>21.7 million (1%)</td>
<td>26.4 million (-2%)</td>
</tr>
<tr>
<td>Walking for fitness</td>
<td>37.5 million (2%)</td>
<td>79.8 million (1%)</td>
</tr>
</tbody>
</table>
53.2 Individual Sports

Casual participation (one-to-12 times) and core participation (13 or more times) in individual sports in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adventure racing</td>
<td>901,000 (39%)</td>
<td>1.2 million (15%)</td>
</tr>
<tr>
<td>Archery</td>
<td>6.2 million (4%)</td>
<td>1.3 million (4%)</td>
</tr>
<tr>
<td>Billiards/pool</td>
<td>23.2 million (-6%)</td>
<td>11.4 million (-9%)</td>
</tr>
<tr>
<td>Bowling</td>
<td>35.7 million (-4%)</td>
<td>10.5 million (-6%)</td>
</tr>
<tr>
<td>Boxing for fitness</td>
<td>2.5 million (n/a)</td>
<td>2.7 million (n/a)</td>
</tr>
<tr>
<td>Boxing for competition</td>
<td>982,000 (n/a)</td>
<td>158,000 (n/a)</td>
</tr>
<tr>
<td>Darts</td>
<td>11.3 million (-6%)</td>
<td>5.3 million (-8%)</td>
</tr>
<tr>
<td>Golf (9/18 hole courses)</td>
<td>24.7 million (-3%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Horseback riding</td>
<td>5.6 million (-6%)</td>
<td>2.5 million (-7%)</td>
</tr>
<tr>
<td>Ice skating</td>
<td>9.0 million (-1%)</td>
<td>1.7 million (0%)</td>
</tr>
<tr>
<td>Martial arts</td>
<td>1.5 million (2%)</td>
<td>3.8 million (-7%)</td>
</tr>
<tr>
<td>Mixed martial arts (competition)</td>
<td>783,000 (n/a)</td>
<td>194,000 (n/a)</td>
</tr>
<tr>
<td>Mixed martial arts (fitness)</td>
<td>1.2 million (n/a)</td>
<td>1.1 million (n/a)</td>
</tr>
<tr>
<td>Roller skating (2x2 wheels)</td>
<td>5.2 million (-5%)</td>
<td>1.4 million (-4%)</td>
</tr>
<tr>
<td>Roller skating (inline wheels)</td>
<td>4.2 million (-7%)</td>
<td>1.9 million (-15%)</td>
</tr>
<tr>
<td>Scooter riding (non-motorized)</td>
<td>1.8 million (-6%)</td>
<td>2.3 million (-12%)</td>
</tr>
<tr>
<td>Skateboarding</td>
<td>3.7 million (-3%)</td>
<td>2.6 million* (-7%)</td>
</tr>
<tr>
<td>Trail running</td>
<td>6.8 million (8%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Triathlon (non-traditional/off-road)</td>
<td>418,000 (23%)</td>
<td>672,000 (25%)</td>
</tr>
<tr>
<td>Triathlon (traditional/road)</td>
<td>741,000 (20%)</td>
<td>1.5 million (20%)</td>
</tr>
</tbody>
</table>

* core participation is 26 or more times

53.3 Racquet Sports

Casual participation (one-to-12 times) and core participation (13 or more times) in racquet sports in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Badminton</td>
<td>4.8 million (0%)</td>
<td>2.3 million (1%)</td>
</tr>
<tr>
<td>Cardio tennis</td>
<td>1.5 million (7%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Racquetball</td>
<td>2.6 million (0%)</td>
<td>1.2 million (-9%)</td>
</tr>
<tr>
<td>Squash</td>
<td>1.1 million (23%)</td>
<td>332,000* (5%)</td>
</tr>
<tr>
<td>Table tennis</td>
<td>12.4 million (2%)</td>
<td>4.7 million (-1%)</td>
</tr>
<tr>
<td>Tennis</td>
<td>17.7 million (0%)</td>
<td>n/a</td>
</tr>
</tbody>
</table>

* core participation is 8 or more times
### 53.4 Team Sports

Casual participation and core participation (defined by a different number of times for various sports) in team sports in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Sport</th>
<th>Casual</th>
<th>Core #</th>
<th>Core Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseball:</td>
<td>4.2 million (-2%)</td>
<td>13+</td>
<td>9.1 million (-4%)</td>
</tr>
<tr>
<td>Basketball:</td>
<td>7.0 million (-3%)</td>
<td>13+</td>
<td>16.7 million (-1%)</td>
</tr>
<tr>
<td>Cheerleading:</td>
<td>1.7 million (6%)</td>
<td>26+</td>
<td>1.6 million (4%)</td>
</tr>
<tr>
<td>Field hockey:</td>
<td>727,000 (6%)</td>
<td>8+</td>
<td>747,000 (6%)</td>
</tr>
<tr>
<td>Football (flag):</td>
<td>2.8 million (-7%)</td>
<td>13+</td>
<td>2.8 million (-3%)</td>
</tr>
<tr>
<td>Football (touch):</td>
<td>3.9 million (-2%)</td>
<td>13+</td>
<td>3.2 million (-8%)</td>
</tr>
<tr>
<td>Football (tackle):</td>
<td>2.6 million (-6%)</td>
<td>26+</td>
<td>3.6 million (-3%)</td>
</tr>
<tr>
<td>Gymnastics:</td>
<td>3.2 million (7%)</td>
<td>50+</td>
<td>1.8 million (2%)</td>
</tr>
<tr>
<td>Ice hockey:</td>
<td>1.1 million (9%)</td>
<td>13+</td>
<td>1.3 million (3%)</td>
</tr>
<tr>
<td>Lacrosse:</td>
<td>914,000 (15%)</td>
<td>13+</td>
<td>899,000 (8%)</td>
</tr>
<tr>
<td>Paintball:</td>
<td>2.5 million (-4%)</td>
<td>8+</td>
<td>1.0 million (-12%)</td>
</tr>
<tr>
<td>Roller hockey:</td>
<td>841,000 (2%)</td>
<td>13+</td>
<td>457,000 (6%)</td>
</tr>
<tr>
<td>Rugby:</td>
<td>756,000 (19%)</td>
<td>8+</td>
<td>427,000 (8%)</td>
</tr>
<tr>
<td>Soccer (indoor):</td>
<td>2.0 million (0%)</td>
<td>13+</td>
<td>2.8 million (3%)</td>
</tr>
<tr>
<td>Soccer (outdoor):</td>
<td>6.5 million (-3%)</td>
<td>26+</td>
<td>6.2 million (-1%)</td>
</tr>
<tr>
<td>Softball (fast pitch):</td>
<td>1.1 million (2%)</td>
<td>26+</td>
<td>1.4 million (2%)</td>
</tr>
<tr>
<td>Softball (slow pitch):</td>
<td>2.7 million (-6%)</td>
<td>13+</td>
<td>4.2 million (-7%)</td>
</tr>
<tr>
<td>Swimming on a team:</td>
<td>1.2 million (n/a)</td>
<td>50+</td>
<td>1.5 million (n/a)</td>
</tr>
<tr>
<td>Track and field:</td>
<td>1.8 million (-3%)</td>
<td>26+</td>
<td>2.3 million (-2%)</td>
</tr>
<tr>
<td>Ultimate frisbee:</td>
<td>3.7 million (4%)</td>
<td>13+</td>
<td>1.3 million (1%)</td>
</tr>
<tr>
<td>Volleyball (beach/sand):</td>
<td>3.3 million (4%)</td>
<td>13+</td>
<td>1.5 million (5%)</td>
</tr>
<tr>
<td>Volleyball (court):</td>
<td>2.7 million (-3%)</td>
<td>13+</td>
<td>3.7 million (-3%)</td>
</tr>
<tr>
<td>Volleyball (grass):</td>
<td>3.0 million (-3%)</td>
<td>13+</td>
<td>1.1 million (-6%)</td>
</tr>
<tr>
<td>Wrestling:</td>
<td>948,000 (-11%)</td>
<td>26+</td>
<td>881,000 (-10%)</td>
</tr>
</tbody>
</table>

### 53.5 Outdoor Sports

Casual participation and core participation (defined by a different number of times for various sports) in outdoor sports in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Sport</th>
<th>Casual</th>
<th>Core #</th>
<th>Core Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bicycling - BMX:</td>
<td>1.1 million (9%)</td>
<td>13+</td>
<td>1.0 million (-2%)</td>
</tr>
<tr>
<td>Bicycling - mountain:</td>
<td>3.8 million (3%)</td>
<td>13+</td>
<td>4.8 million (4%)</td>
</tr>
<tr>
<td>Bicycling - road/paved:</td>
<td>19.5 million (2%)</td>
<td>26+</td>
<td>21.4 million (1%)</td>
</tr>
<tr>
<td>Climbing (sport/indoor):</td>
<td>4.7 million (1%)</td>
<td>-</td>
<td>n/a</td>
</tr>
<tr>
<td>Climbing (traditional):</td>
<td>2.3 million (2%)</td>
<td>-</td>
<td>n/a</td>
</tr>
<tr>
<td>Fishing (fly):</td>
<td>3.8 million (5%)</td>
<td>8+</td>
<td>2.1 million (-6%)</td>
</tr>
<tr>
<td>Fishing (freshwater):</td>
<td>20.1 million (1%)</td>
<td>8+</td>
<td>17.7 million (-5%)</td>
</tr>
</tbody>
</table>
• Fishing (saltwater): 7.1 million (-3%)  8+  4.7 million (-4%)
• Hiking (day): 34.2 million (2%) - n/a
• Hunting (bow): 2.2 million (5%)  8+  1.9 million (-1%)
• Hunting (handgun): 2.1 million (5%)  8+  1.1 million (2%)
• Hunting (rifle): 7.1 million (0%) 13+  2.7 million (-5%)
• Hunting (shotgun): 4.8 million (2%)  8+  7.1 million (-6%)
• Shooting (sport clays): 3.1 million (0%)  8+  1.4 million (-5%)
• Shooting (trap/skeet): 2.5 million (3%)  8+  1.3 million (-1%)
• Target shooting (handgun): 8.4 million (5%)  8+  6.0 million (1%)
• Target shooting (rifle): 7.6 million (2%)  8+  5.4 million (-1%)

53.6 Water Sports
Casual participation (one-to-seven times) and core participation (8 or more times) in water sports in 2013 was as follows (five-year change in participation in parenthesis):

<table>
<thead>
<tr>
<th>Sport</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boardsailing/windsurfing</td>
<td>1.1 million (4%)</td>
<td>234,000 (-3%)</td>
</tr>
<tr>
<td>Canoeing</td>
<td>10.2 million (1%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Jet skiing</td>
<td>4.4 million (-2%)</td>
<td>2.0 million (-7%)</td>
</tr>
<tr>
<td>Kayaking (recreational)</td>
<td>8.7 million (9%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Kayaking (sea touring)</td>
<td>2.7 million (11%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Kayaking (white water)</td>
<td>2.1 million (12%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Rafting</td>
<td>3.8 million (-3%)</td>
<td>n/a</td>
</tr>
<tr>
<td>Sailing</td>
<td>2.7 million (2%)</td>
<td>1.2 million (-4%)</td>
</tr>
<tr>
<td>Scuba diving</td>
<td>2.4 million (3%)</td>
<td>823,000 (-4%)</td>
</tr>
<tr>
<td>Snorkeling</td>
<td>6.9 million (-2%)</td>
<td>1.8 million (-4%)</td>
</tr>
<tr>
<td>Stand-up paddling</td>
<td>1.9 million (n/a)</td>
<td>n/a</td>
</tr>
<tr>
<td>Surfing</td>
<td>1.6 million (3%)</td>
<td>1.0 million (1%)</td>
</tr>
<tr>
<td>Wakeboarding</td>
<td>2.3 million (-1%)</td>
<td>1.0 million (-2%)</td>
</tr>
<tr>
<td>Water skiing</td>
<td>3.1 million (-4%)</td>
<td>1.1 million (-10%)</td>
</tr>
</tbody>
</table>

53.7 Market Resources
Sports & Fitness Industries Association, 8505 Fenton Street, Suite 211, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)
54.1 Overview
Annual state fairs are held in 44 states; combined attendance is more than 28 million. State fairs in 11 states – Arizona, California, Indiana, Iowa, Minnesota, Massachusetts, New York, North Carolina, Oklahoma, Texas, and Washington – are each attended by one million or more people each year.

Several local fairs rival the larger state fairs in attendance. Three county fairs are attended by more than one million people annually, and seven regional fairs have attendance figures of more than 500,000.

54.2 Profiles of State Fairs

Alabama
North Alabama State Fair
- Location: Muscle Shoals
- Date: September 16-21, 2014
- Estimated annual attendance: 50,000
- Website: www.northalabamastatefair.org

Alaska
Alaska State Fair
- Location: Palmer
- Date: August 21 - September 1, 2014
- Estimated annual attendance: 290,000
- Website: www.alaskastatefair.org

Arizona
Arizona Exposition & State Fair
- Location: Phoenix
- Date: October 10 - November 2, 2014
- Estimated annual attendance: 1.1 million
- Website: www.azstatefair.com

Arkansas
Arkansas State Fair
• Location: Little Rock
• Date: October 10-19, 2014
• Estimated annual attendance: 470,000
• Website: www.arkansasstatefair.com

**California**
California State Fair
• Location: Sacramento
• Date: July 11-27, 2014
• Estimated annual attendance: 940,000
• Website: www.calstatefair.org

**Colorado**
Colorado State Fair
• Location: Pueblo
• Date: August 22 - September 1, 2014
• Estimated annual attendance: 400,000
• Website: www.coloradostatefair.com

**Delaware**
Delaware State Fair
• Location: Harrington
• Date: July 23 - August 1, 2014
• Estimated annual attendance: 300,000
• Website: www.delawarestatefair.com

**Florida**
Florida State Fair
• Location: Tampa
• Date: February 5-16, 2015
• Estimated annual attendance: >400,000
• Website: www.floridastatefair.com

**Georgia**
Georgia National Fair
• Location: Perry
• Date: October 4-14, 2014
• Estimated annual attendance: 440,000
• Website: www.georgianationalfair.com

North Georgia State Fair
• Location: Marietta
• Date: October 2, 13, 2014
• Estimated annual attendance: 280,000
Hawaii
Hawaii 50th State Fair
• Location: Aiea
• Date: May 23 - June 15, 2014 (weekends only)
• Website: www.ekfernandez.com/events/50th-entertainment.asp

Idaho
Eastern Idaho State Fair
• Location: Blackfoot
• Date: August 30 - September 6, 2014
• Estimated annual attendance: 220,000
• Website: www.idaho-state-fair.com

Western Idaho Fair
• Location: Boise
• Date: August 15-24, 2014
• Estimated annual attendance: 250,000
• Website: www.idahofair.com

Illinois
Illinois State Fair
• Location: Springfield
• Date: August 7-17, 2014
• Estimated annual attendance: 700,000
• Website: www.agr.state.il.us/isf/

Indiana
Indiana State Fair
• Location: Indianapolis
• Date: August 1-17, 2014
• Estimated annual attendance: 975,000
• Website: www.in.gov/statefair/

Iowa
Iowa State Fair
• Location: Des Moines
• Date: August 7-17, 2014
• Estimated annual attendance: 1.1 million
• Website: www.iowastatefair.org
Kansas
Kansas State Fair
• Location: Hutchinson
• Date: September 5-14, 2014
• Estimated annual attendance: 350,000
• Website: www.kansasstatefair.com

Kentucky
Kentucky State Fair
• Location: Louisville
• Date: August 14-24, 2014
• Estimated annual attendance: 615,000
• Website: www.kystatefair.org

Louisiana
State Fair of Louisiana
• Location: Shreveport
• Date: October 23 - November 9, 2014
• Estimated annual attendance: 400,000
• Website: www.statefairoflouisiana.com

Maryland
Maryland State Fair
• Location: Timonium
• Date: August 24 - September 3, 2014
• Estimated annual attendance: >500,000
• Website: www.marylandstatefair.com

Massachusetts/New England
The Big E
• Location: West Springfield
• Date: September 12-28, 2014
• Estimated annual attendance: 1.26 million
• Website: www.thebige.com

Minnesota
Minnesota State Fair
• Location: Falcon Heights
• Date: August 22 - September 1, 2014
• Estimated annual attendance: 1.77 million
• Website: www.mnstatefair.org
Mississippi
Mississippi State Fair
• Location: Jackson
• Date: October 1-12, 2014
• Website: www.facebook.com/pages/Mississippi-State-Fair/216211341761752?rf=165473350136361

Missouri
Missouri State Fair
• Location: Sedalia
• Date: August 7 - 17, 2014
• Estimated annual attendance: 340,000
• Website: www.mostatefair.com

Montana
Montana State Fair
• Location: Great Falls
• Date: July 25 - August 2, 2014
• Estimated annual attendance: 157,000
• Website: www.montanastatefair.com

Nebraska
Nebraska State Fair
• Location: Grand Island
• Date: August 22 - September 1, 2014
• Estimated annual attendance: 333,000
• Website: www.statefair.org

New Jersey
New Jersey State Fair
• Location: Augusta
• Date: August 1-11, 2014
• Estimated annual attendance: 200,000
• Website: www.newjerseystatefair.com

New Mexico
New Mexico State Fair
• Location: Albuquerque
• Date: September 10-21, 2014
• Estimated annual attendance: 740,000
• Website: http://exponm.com/state-fair/
New York
Great New York State Fair
• Location: Syracuse
• Date: August 21 - September 1, 2014
• Estimated annual attendance: 1.1 million
• Website: www.nysfair.org

North Carolina
North Carolina State Fair
• Location: Raleigh
• Date: October 16-26, 2014
• Estimated annual attendance: 1.0 million
• Website: www.ncstatefair.org

North Dakota
North Dakota State Fair
• Location: Minot
• Date: July 18-26, 2014
• Estimated annual attendance: >300,000
• Website: www.ndstatefair.com

Ohio
Ohio State Fair
• Location: Columbus
• Date: July 29 - August 9, 2014
• Estimated annual attendance: 833,000
• Website: www.ohiostatefair.com

Oklahoma
Oklahoma State Fair
• Location: Oklahoma City
• Date: September 11-21, 2014
• Estimated annual attendance: 1.0 million
• Website: www.okstatefair.com

Tulsa State Fair
• Location: Tulsa
• Date: September 25 - October 5, 2014
• Estimated annual attendance: 970,000
• Website: www.tulsastatefair.com

Oregon
Oregon State Fair
• Location: Salem
South Carolina
South Carolina State Fair
- Location: Columbia
- Date: October 8-19, 2014
- Estimated annual attendance: 490,000
- Website: www.scstatefair.org

South Dakota
South Dakota State Fair
- Location: Huron
- Date: August 28 - September 1, 2014
- Estimated annual attendance: 177,000
- Website: www.sdstatefair.com

Tennessee
Tennessee State Fair
- Location: Nashville
- Date: September 5-14, 2014
- Website: www.tnstatefair.org

Texas
State Fair of Texas
- Location: Dallas
- Date: September 26 - October 19, 2014
- Estimated annual attendance: > 3 million
- Website: www.bigtex.com

Utah
Utah State Fair
- Location: Salt Lake City
- Date: September 4-14, 2014
- Estimated annual attendance: 325,000
- Website: www.utah-state-fair.com

Vermont
Vermont State Fair
- Location: Rutland
- Date: August 29 - September 7, 2014
- Estimated annual attendance: 80,000
- Website: www.vermontstatefair.net
Virginia
State Fair of Virginia
• Location: Caroline County
• Date: September 26 - October 5, 2014
• Estimated annual attendance: 227,000
• Website: www.statefairva.org

Washington
Central Washington State Fair
• Location: Yakima
• Date: September 19 - 28, 2014
• Estimated annual attendance: 300,000
• Website: www.statefairpark.org/p/central-wa-state-fair

Evergreen State Fair
• Location: Monroe
• Date: August 21 - September 1, 2014
• Estimated annual attendance: 750,000
• Website: www.evergreenfair.org

Washington State Fair
• Location: Puyallup
• Date: September 5 - 21, 2014
• Estimated annual attendance: 1.1 million
• Website: www.thefair.com

West Virginia
State Fair of West Virginia
• Location: Fairlea
• Date: August 8 - 16, 2014
• Estimated annual attendance: 210,000
• Website: www.statefairofwv.com

Wisconsin
Wisconsin State Fair
• Location: Milwaukee
• Date: July 31 - August 10, 2014
• Estimated annual attendance: 860,000
• Website: www.wistatefair.com
Wyoming
Wyoming State Fair
• Location: Douglas
• Date: August 9-16, 2014
• Estimated annual attendance: 80,000
• Website: www.wystatefair.com

54.3 Largest Local Fairs

The following are the largest county and regional fairs:

• Los Angeles County Fair (Pomona, CA): 1.3 million
• San Diego County Fair (Del Mar, CA): 1.2 million
• Orange County Fair (Costa Mesa, CA): 1.1 million
• Erie County Fair (Hamburg, NY): 856,000
• Florida Strawberry Festival & Fair (Plant City, FL): 750,000
• Miami-Dade County Fair & Exposition (Miami, FL): 700,000
• York Fair (York, PA): 613,000
• South Florida Fair (West Palm Beach, FL): 580,000
• Great Allentown Fair (Allentown, PA): 576,000
• Big Fresno Fair (Fresno, CA): 545,000
• Greater Jacksonville Fair (Jacksonville, FL): 493,000
• Pensacola Interstate Fair (Pensacola, FL): 486,000
• Dutchess County Fair (Rhinebeck, NY): 480,000
• Bloomsburg Fair (Bloomsburg, PA): 441,000
• Ionia Free Fair (Ionia, MI): 402,000
STATE GAMES

55.1 Overview
Thirty-one states conduct statewide sports festivals known as State Games, which are modeled after the Olympic Games. Nationwide more than 90 sports are offered each year in State Games, with competitions held in 536 communities for participants from over 6,000 cities and towns. Both recreational and competitive, State Games events have been the first step for many Olympic and professional athletes.

State Games competitions include Olympic or Pan American sports such as basketball, bowling, diving, figure skating, tennis, tae kwon do, gymnastics, ice hockey, road races, soccer, softball, swimming, track & field, volleyball, etc., as well as a wide variety of local favorites such as arm wrestling, field hockey, horseshoes, equestrian, mountain biking, and more.

Each year nearly 500,000 athletes of all ages, backgrounds, and skill levels take part in State Games competitions nationwide. An additional 1.2 million spectators attend State Games events, all made possible by the work of thousands of coaches, parents, officials, sponsors, and more than 100,000 volunteers.

55.2 Profiles of State Games
Alabama
Alabama Sports Festival (www.alagames.com)
• Summer Games: June

Arizona
Grand Canyon State Games (www.gcsog.org)
• Summer Games: June
• Winter Games: January-April

California
California State Games (www.calstatelgames.org)
• Summer Games: July-August
• Winter Games: February-March
Colorado
Rocky Mountain State Games (www.rockymountaingames.org)
• Summer Games: July

Connecticut
Nutmeg State Games (www.nutmegstategames.org)
• Summer Games: July-August

Florida
Sunshine State Games (www.flasports.com)
• Summer Games: April-June

Georgia
Georgia Games (www.georgiagames.org)
• Summer Games: July

Iowa
Iowa Games (www.iowagames.org)
• Summer Games: July
• Winter Games: January-February

Kansas
Sunflower State Games (www.sunflowergames.com)
• Summer Games: July

Kentucky
Bluegrass State Games (www.bgsg.org)
• Summer Games: July

Maine
Maine Games (www.mainegames.org)
• Summer Games: March-July

Massachusetts
Bay State Games (www.baystategames.org)
• Summer Games: July
• Winter Games: January

Michigan
State Games of Michigan (www.stategamesofmichigan.com)
• Summer Games: June
Minnesota
Star of the North State Games (www.starofthenorthgames.org)
• Summer Games: June

Mississippi
State Games of Mississippi (www.stategamesofms.org)
• Summer Games: June

Missouri
Show-Me State Games (www.smsg.org)
• Summer Games: July

Montana
Big Sky State Games (www.bigskygames.org)
• Summer Games: April, July

Nebraska
Cornhusker State Games (www.cornhuskerstategames.com)
• Summer Games: July

New Mexico
New Mexico State Games (www.nmgames.com)
• Summer Games: May, July

New York
Empire State Games (www.empirestategames.org)
• Summer Games: July
• Winter Games: February

North Carolina
State Games of North Carolina (www.ncsports.org)
• Summer Games: June

North Dakota
Prairie Rose State Games (www.prairierose.org)
• Summer Games: July

Oklahoma
Sooner State Games (www.soonerstategames.org)
• Summer Games: June
• Winter Games: January-March
Oregon
State Games of Oregon (www.stategamesoforegon.org)
• Summer Games: July

Pennsylvania
Keystone State Games (www.keystonegames.com)
• Summer Games: July
• Winter Games: January

Texas
Games of Texas (www.taaf.com/site/)
• Summer Games: July
• Winter Games: January

Utah
Utah Summer Games (www.utahsummergames.org)
• Summer Games: June

Virginia
Commonwealth Games of Virginai (www.commonwealthgames.org)
• Summer Games: July

Washington
Washington Games (www.washingtongames.org)
• Summer Games: August-September

Wisconsin
Badger State Games (www.sportswisconsin.com)
• Summer Games: June
• Winter Games: January-February

55.3 Market Resources
National Congress of State Games, 1631 Mesa Avenue, Suite E, Colorado Springs, CO 80906. (719) 634-7333. (www.stategames.org)
56

SWIMMING

56.1 Participation

According to the 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 26.4 million people swim for fitness at least once a year – 16.9 million are casual participants (<50 times per year) and 9.4 million are core participants (>50 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>14.1 million</td>
<td>7.5 million</td>
</tr>
<tr>
<td>2012</td>
<td>15.1 million</td>
<td>8.1 million</td>
</tr>
<tr>
<td>2013</td>
<td>16.9 million</td>
<td>9.4 million</td>
</tr>
</tbody>
</table>

56.2 Swimming Pools

According to USA Swimming (www.usaswimming.org) and the National Swimming Pool Foundation (www.nspf.org), there are 10 million swimming pools in the United States; 360,000 are public pools open year round.

According to Pool & Spa Marketing Magazine, there are approximately 12 million residential swimming pools in the United States; approximately 6.3 million are in-ground pools. Between 350,000 and 400,000 new residential pools are installed annually; approximately 50% of these in-ground pools.

According to IBISWorld (www.ibisworld.com), there are 13,913 swimming pool construction companies in the United States; combined revenue is $12 billion.

56.3 Beaches

While beaches on coastal areas are highest profile, there are popular beaches on lakes and rivers throughout the United States; there are beaches in every state. Ninety percent (90%) of Americans live within 60 minutes of a body of water.

According to the Clean Beaches Council (www.cleanbeaches.org), there are 3,500 ocean, lake, and bay beaches in the United States.

Based on a poll of local experts, USA Today compiled the following list of the top beaches in each state:

Alabama
• Gulf State Park (Gulf Shores, www.alapark.com/gulfstate)
Alaska
• Homer Spit (Kachemak Bay, www.homeralaska.org)

Arizona
• Lake Havasu (Lake Havasu City, www.golakehavasu.com)

California
• Crystal Cove State Park (Orange County, www.crystalcovestatepark.com)

Colorado
• Medano Creek (Great Dunes National Park www.nps.gov/grsa/medano-creek.htm)

Delaware
• Delaware Seashore State Park (www.destateparks.com/park/delaware-seashore)

District of Columbia
• The Yards Park (The Anacostia River, www.yardspark.org)

Florida
• Siesta Beach (Sarasota, www.visitsarasota.org/siesta-key)

Hawaii
• Hapuna Beach (Kohala Coast, www.gohawaii.com/big-island)

Idaho
• Lake Coeur d’Alene (Coeur d’Alene, www.coeurdalene.org)

Indiana
• Indiana Dunes State Park (Lake Michigan, www.in.gov/dnr/parklake/2980.htm)

Iowa
• Clear Lake (www.clearlakeiowa.com)

Kansas
• Scott State Park (Scott City, http://kdwpt.state.ks.us/news/state-parks/locations/scott)

Kentucky
• Buckhorn Lake (www.parks.ky.gov/parks/resortparks/buckhorn-lake/default.aspx)

Louisiana
• Grand Isle (www.grand-isle.com)
Maine
• Ogunquit Beach (www.ogunquit.org)

Maryland
• Assateague Island National Seashore (Ocean City, www.nps.gov/asis)

Massachusetts
• Crane Beach (Ipswich, www.thetrustees.org/places-to-visit/northeast-ma/crane-beach-on-the-crane.html)

Michigan
• Stearns Park Beach (Ludington, www.michigan.org)

Minnesota
• Park Point Beach (www.exploreminnesota.com)

Mississippi
• Ship Island (www.msshipisland.com)

Missouri
• Table Rock Lake (near Branson, www.visittablerocklake.com)

Montana
• Whitefish Lake (www.explorewhitefish.com)

Nebraska
• Calamus Reservoir (www.outdoornebraska.com)

Nevada
• Zephyr Cove (www.zephyrcove.com)

New Hampshire
• Hampton Beach State Park (www.nhstateparks.org)

New Jersey
• Cape May (www.discovercapemay.com)

New Mexico
• Blue Hole (Santa Rosa, www.santarosanm.org)

New York
• Fire Island (www.nps.gov/fiis/index.htm)

• 285 •
North Carolina
• Southport Oak Island (www.southport-oakisland.com)

North Dakota
• Lake Renwich (Icelandic State Park, www.parkrec.nd.gov)

Ohio
• Cedar Point Beach (Lake Erie, www.cedarpoint.com)

Oregon
• Bandon Beach (www.bandon.com)

Pennsylvania
• Pymatuning Reservoir (www.dcnr.state.pa.us/stateparks/findapark/pymatuning)

Rhode Island
• East Matunuck State Beach (www.riparks.com/locations/locationeastmatunuck.html)

South Carolina
• Kiawah Island (www.kiawahresort.com)

South Dakota
• Lewis and Clark Lake (www.lewisandclarkpark.com)

Tennessee
• Nashville Shores Water Park (Percy Priest Lake, www.nashvilleshores.com)

Texas
• Padre Island National Seashore (near Corpus Christi, www.nps.gov/pais/index.htm)

Utah
• Bear Lake Rendezvous Beach (http://stateparks.utah.gov/park/bear-lake-state-park)

Vermont
• Lake Willoughby (Westmore, www.travelthe kingdom.com)

Virginia
• False Cape State Park and Back Bay National Wildlife Refuge (www.dcr.virginia.gov/state_parks/fal.shtml)

Washington
• Second Beach (near La Push, www.nps.gov/olym)
West Virginia
• Summersville Lake (www.summersvillecvb.com)

Wisconsin
• North Beach (Racine, www.cityofracine.org/depts/health/beach.aspx)

Wyoming
• Horseshoe Bend (Bighorn Canyon National Recreation Area, www.nps.gov/bica)

Annual visits to the most popular U.S. beaches are as follows (sources: United States Lifesaving Association (www.usla.org) and Travel + Leisure):
• Venice Beach, CA: 16.0 million
• Miami Beach, FL: 13.3 million
• Coney Island (Brooklyn, NY): 11.2 million
• Newport Beach, CA: 9.4 million
• Daytona Beach, FL: 8.0 million
• Huntington Beach, CA: 7.9 million
• Hollywood, FL: 7.7 million
• Jones Beach, NY: 5.1 million
• Brevard County, FL: 4.8 million
• Ocean City, MD: 4.5 million
• Laguna Beach, CA: 4.3 million
• Oceanside, CA: 4.0 million
• Santa Rosa Island, FL: 4.0 million
• Virginia Beach, VA: 3.7 million
• Rockaway Beach, NY: 3.7 million
• Coronado, CA: 3.6 million
• Pinellas County, FL: 3.5 million
• Clearwater, FL: 3.5 million
• North Myrtle Beach, SC: 3.5 million
• Palm Beach, FL: 3.4 million

56.4 Market Resources


USA Swimming, 1 Olympic Plaza, Colorado Springs, CO 80909. (719) 866-4578. (www.usaswimming.org)
57

TAILGATING

57.1 Overview

A Cultural Analysis of Tailgating, a recent study by Prof. John F. Sherry Jr. at the University of Notre Dame, showed that tailgating is not only fun for participants, it builds community and nurtures tradition for the team which host the activities.

_________________________________________________________________

“Pregame tailgating isn’t just a party, it’s a complex community-building exercise. Tailgating is more about sharing than it is about competition, and people who participate help build the brands of their favorite teams. The individual traditions that they are creating add to the larger tradition. They see it as participating in the team experience. Tailgating before college games enables fans to surround the entertainment that’s provided for you with entertainment that you yourself are creating.”

John F. Sherry Jr., Ph.D.
Herrick Professor of Marketing
University of Notre Dame

_________________________________________________________________

57.2 Market Assessment

The American Tailgaters Association (ATA, www.atailgate.com) estimates that 20 million to 50 million tailgaters spend from $7 billion to $15 billion each year on food and gear.

Online Colleges (www.onlinecolleges.com) estimates annual spending on food, beverages, and supplies for tailgating significantly higher, at $35 billion.
Tailgaters are generally an affluent group. According to the ATA, some 57% of tailgaters earn $75,000-plus annually; 82% are homeowners.

Students make up only about 5% of tailgaters at college football games; 60% are ages 25-to-44.

Some tailgaters bring a recreational vehicle (RV) to events for access to a kitchen and refrigerator, and a convenient bathroom.

The average tailgater attends six to 10 parties a season and spends more than $500 on food (not including alcoholic beverages). Ninety-five percent (95%) of tailgaters prepare their food at the venue.

### 57.3 Tailgating Events

The most popular events for tailgating are college and professional football games. An estimated 30% of people attending tailgating parties at football stadiums never enter the stadium.

Tailgating dates to the 1870s when fans traveled to Ivy League football games by horse-drawn carriage. Modern tailgating gained attention in the 1950s when Florida Times-Union dubbed tailgating at the University of Florida and University of Georgia game ‘The World’s Largest Outdoor Cocktail Party.’

The Ultimate Tailgate Party, held on football weekends at Penn State, has one of the largest areas for tailgating – some 40,000 people tailgate at the agricultural fields around Beaver Stadium.

At Ohio State, the Hineygate party, a tradition since the mid-1980s, draws up to 50,000 students and fans on football weekends.

There are tailgating activities at every NFL stadium. The professional football season ends with the NFL Tailgate Party, hosted by the National Football League itself and held in conjunction with the Super Bowl. Attendance at the event is by invitation only, and tickets are harder to score than for the Super Bowl itself. Guests have access to meet and greets as well as autograph signings. Thousands of people unable to attend the NFL Tailgate Party tailgate in the parking lots and areas near the Super Bowl host stadium.

Within the last few years, tailgating has spread to high school football games. Among the biggest tailgating events are those staged by the 100,000 people on the infield at Churchill Downs for the Kentucky Derby. More than 100,000 people tailgate at the Indianapolis 500.

Some of the biggest non-sports-related events attracting tailgating are concerts. Among the biggest parties are Jimmy Buffett concerts, where fans congregate on parking lots hours before concerts and host Parrothead tailgates.

In May 2011, an estimated 700,000 people gathered on roads and in beachside towns around Cape Canaveral to watch the final space shuttle launch as Space Shuttle Endeavour left the Earth for its final flight. Rob Varley, executive director of the Space Coast Office of Tourism (www.space-coast.com), called this the world’s largest tailgate party.
57.4 Best Cities For Tailgating

An assessment by DirecTV and KVH Industries ranked 31 cities with professional sports teams for the best tailgating. Criteria included stadium parking lots, overall tailgating environment, tailgating-fan enthusiasm, and the use of tailgating accessories. The top cities were as follows:

1. Baltimore, MD
2. Denver, CO
3. Houston, TX
4. San Diego, CA
5. Cincinnati, OH
6. Miami, FL
7. Tampa, FL
8. Kansas City, MO
9. Buffalo, NY
10. (tie) Philadelphia, PA
10. (tie) Phoenix, AZ

ESPN rated Louisiana State University, Ole Miss, Tennessee, Washington, and Penn State highest for collegiate tailgating experiences.

Food & Wine ranked the best tailgating at football games as follows:

College Football
- Ole Miss Rebels (Vaught-Hemingway Stadium at Hollingsworth Field)
- Notre Dame Fighting Irish (Notre Dame Stadium)
- Texas Longhorns (Darrell K. Royal-Texas Memorial Stadium)
- North Carolina Tar Heels (Kenan Memorial Stadium)
- Auburn Tigers (Jordan-Hare Stadium)
- Colorado Buffaloes (Folsom Field)
- Nebraska Cornhuskers (Memorial Stadium)
- Wisconsin Badgers (Camp Randall Stadium)
- Oklahoma Sooners (Gaylord Family-Oklahoma Memorial Stadium)
- University of Michigan Wolverines (Michigan Stadium)
- University of Washington Huskies (Husky Stadium)
- Duke Blue Devils (Wallace Wade Stadium)
- LSU Tigers (Tiger Stadium)

Professional Football
- Kansas City Chiefs (Arrowhead Stadium)
- Chicago Bears (Soldier Field)
- Buffalo Bills (Ralph Wilson Stadium)
- San Diego Chargers (Qualcomm Stadium)
- Pittsburgh Steelers (Heinz Field)
- New York Giants and New York Jets (MetLife Stadium)
- Cleveland Browns (Cleveland Browns Stadium)
• New England Patriots (Gillette Stadium)
• Houston Texans (Reliant Stadium)
• Green Bay Packers (Lambeau Field)
• Miami Dolphins (Sun Life Stadium)
• Tampa Bay Buccaneers (Raymond James Stadium)
• Cincinnati Bengals (Paul Brown Stadium)
• Oakland Raiders (Oakland-Alameda County Coliseum)
• Washington Redskins (FedEx Field)
• Philadelphia Eagles (Lincoln Financial Field)
• Baltimore Ravens (M&T Bank Stadium)

The following are ranked the best NASCAR tracks for tailgating:
• Bristol Motor Speedway (Bristol, TN)
• Charlotte Motor Speedway (Concord, NC)
• Indianapolis Motor Speedway (Indianapolis, IN)
• Pocono Raceway (Long Pond, PA)
• Infineon Raceway (Sonoma, CA)
• Dover Downs (Dover, DE)
• Talladega Superspeedway (Talladega, AL)
58

TENNIS

58.1 Participation & Spending

According to the United States Tennis Association (USTA, www.usta.com), 27 million people play tennis. In total, there are approximately 600 million play occasions each year.

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), the following number of people played tennis at least once:

- 2008: 17.7 million
- 2009: 18.5 million
- 2010: 18.7 million
- 2011: 17.8 million
- 2012: 17.0 million
- 2013: 17.7 million

According to Tennis Consumer Spending in the U.S., a report by the National Tennis Foundation (www.nationaltennisfoundation.org), overall consumer spending on tennis equipment and tennis activities exceeds $16 billion annually, distributed as follows:

- Playing fees (reserved court time fees, club memberships, etc.): $10.1 billion
- Equipment (primarily rackets): $ 2.3 billion
- Other merchandise (court bags, balls, shoes, and apparel): $ 2.9 billion
- Accessories: $ 947 million

58.2 Demographics

The following is a profile of USTA Southern Section members:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Youth</th>
<th>Adults</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>47%</td>
<td>57%</td>
<td>54%</td>
</tr>
<tr>
<td>Male:</td>
<td>53%</td>
<td>43%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Age

- 18 and under: 24%
- 19-to-34: 14%
- 35-to-44: 22%
- 45-to-54: 22%
• 55-to-64: 12%
• 65 and older: 6%

**Household Income**
• Under $25,000: 1%
• $25,000 to $49,999: 12%
• $50,000 to $74,999: 18%
• $75,000 to $99,999: 14%
• $100,000 to $149,999: 35%
• $150,000 to $199,999: 9%
• $200,000 and higher: 11%

**58.3 Tennis Resorts**


**58.4 Market Resources**
United States Tennis Association, 70 West Red Oak Lane, White Plains, NY 10604.
(914) 696-7000. ([www.usta.com](http://www.usta.com))
59.1 Overview

According to Survey of Public Participation in the Arts, published once a decade (most recently in 2012) by The National Endowment for the Arts (www.arts.gov), 15.2% of adults (35.7 million adults) attended a musical play in the prior 12 months, a drop from 16.7% who did so in 2008. Non-musical plays were attended by 8.3% of adults (19.5 million adults), a decline from 9.4% who did so five years prior.

By demographic, the following percentages of adults attended a theatrical performance in 2012:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Musical Plays</th>
<th>Non-musical Plays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>17.3%</td>
<td>9.2%</td>
</tr>
<tr>
<td>Male:</td>
<td>12.9%</td>
<td>7.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Musical Plays</th>
<th>Non-musical Plays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caucasian:</td>
<td>18.4%</td>
<td>10.0%</td>
</tr>
<tr>
<td>African-American:</td>
<td>9.2%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Hispanic:</td>
<td>7.4%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Other:</td>
<td>11.3%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Musical Plays</th>
<th>Non-musical Plays</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-24:</td>
<td>12.9%</td>
<td>6.3%</td>
</tr>
<tr>
<td>25-to-34:</td>
<td>13.6%</td>
<td>7.5%</td>
</tr>
<tr>
<td>35-to-44:</td>
<td>12.9%</td>
<td>7.3%</td>
</tr>
<tr>
<td>45-to-54:</td>
<td>16.8%</td>
<td>9.5%</td>
</tr>
<tr>
<td>55-to-64:</td>
<td>19.0%</td>
<td>9.0%</td>
</tr>
<tr>
<td>65-to-74:</td>
<td>17.8%</td>
<td>10.6%</td>
</tr>
<tr>
<td>75 and over:</td>
<td>12.0%</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Musical Plays</th>
<th>Non-musical Plays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade school:</td>
<td>1.6%</td>
<td>0.3%</td>
</tr>
<tr>
<td>High school:</td>
<td>2.9%</td>
<td>1.8%</td>
</tr>
<tr>
<td>High school graduate:</td>
<td>8.3%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Some college:</td>
<td>14.6%</td>
<td>7.7%</td>
</tr>
<tr>
<td>College graduate:</td>
<td>26.6%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Graduate school:</td>
<td>32.1%</td>
<td>20.0%</td>
</tr>
</tbody>
</table>
59.2 Local Theatre

According to Theater Communications Group (TCG, www.tcg.org), which represents the not-for-profit American theater, there are 1,782 not-for-profit professional theaters in the United States.

The 33rd Annual Research Report, published in October 2013 by TCG, provides the following theater-related data:

- Attendance: 30,000,000
- Subscribers: 1,500,000
- Performances: 187,000
- Productions: 17,000
- Earnings: $811 million
- Contributions: $968 million

The economic impact of local theatre on the communities they serve is $2 billion, according to TCG.

59.3 National Theatre

Theatrical performances are major attractions in New York City, Las Vegas, and Branson. The following is a summary of theatre performances at these three destinations:

Broadway Theatre
- The Broadway League (www.broadwayleague.com) reported that 12.21 million tickets were sold for the 2013-2014 season; gross revenue was $1.27 billion. Approximately 35% of the Broadway audience is local; 65% are tourists.

Las Vegas Shows
- According to the Las Vegas Visitor Profile, published by the Las Vegas Convention and Visitors Authority (LVCVA, www.lvcva.com), 72% of the 39.7 million visitors to Las Vegas in 2013 attended a show.
- The following links to a list of Las Vegas performing arts venues and shows through 2014: www.rkma.com/travel.LasVegasShows.pdf.

Branson Theater
- Known as the “Live Music Show Capital of the World,” theaters in Branson, Missouri, feature over 100 shows every day. Some 70,000 people see shows each day. Over 7.5 million tourists visit Branson each year, primarily to attend theater performances.
- The following links to a list of Branson theaters and the 2014 schedule of shows: www.rkma.com/travel.BransonTheater.pdf.
59.4 Touring Broadway

Thirteen Broadway shows toured in 2014, as follows:

• Jersey Boys
• Joseph And The Amazing Technicolor Dreamcoat
• Kinky Boots
• Million Dollar Quartet
• Motown The Musical
• Newsies
• Once
• Pippin
• Rodgers + Hammerstein’s Cinderella
• The Book of Mormon
• The Lion King
• The Phantom of the Opera
• Wicked

Touring Broadway (www.touringbroadway.com) shows travel to theatres in 146 cities. The following is a link to a list of these theatres: www.rkma.com/leisure.TouringBroadway.pdf.

59.5 Market Resources

National Endowment for the Arts, 400 7th Street SW, Washington, DC 20506.
(202) 682-5400. (www.arts.gov)

The Broadway League, 226 West 47th Street, 6th Floor, New York, NY 10036.
(212) 764-1122. (www.livebroadway.com)

Theatre Communications Group, 520 8th Avenue, 24th Floor, New York, NY 10018.
(212) 609-5901. (www.tcg.org)
60

TRAILS - HIKING

60.1 Overview
According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 34.4 million people hiked in 2013, a 1.3% increase over those who did so in 2012 and a 2.0% increase from the number of hikers five years prior.

60.2 Hiking Trails
The backwoods of America abound with an estimated one million regional trails and footpaths.

Based on a poll of local experts, USA Today compiled the following list of the best trails in each state:

Alabama
- Hugh S. Branyon Backcountry Trail (between Gulf State Park and Orange Beach; http://alapark.com/gulfstate/trails)

Alaska
- Sitka National Historical Park Trail (www.nps.gov/sitk)

Arizona
- Red Mountain Trail (30 miles north of Flagstaff; www.fs.fed.us/r3/coconino/)

Arkansas
- Ozark Highlands Trail (www.ozarkhighlandstrail.com)

California
- Lassen Volcanic National Park (www.nps.gov/lavo)

Colorado
- Maroon Lake Trail (near Aspen; www.fs.usda.gov/whiteriver)

Connecticut
- Devil’s Den Preserve (www.nature.org)
Delaware
• Creek Road and Rocky Run (Brandywine Creek State Park; www.destateparks.com/park/brandywine-creek)

District of Columbia
• Rock Creek Park (Washington; www.nps.gov/rocr)

Florida
• Florida Trail (www.floridatrail.org)

Georgia
• Cloudland Canyon State Park (Lookout Mountain; www.gastateparks.org/CloudlandCanyon/)

Hawaii
• Waihee Ridge Trail (Maui; www.hawaiitrails.org)

Idaho
• Tubbs Hill (www.visitidaho.org)

Illinois
• Shawnee National Forest (Garden of the Gods Recreation Area; www.fs.usda.gov/shawnee)

Indiana
• Dunes Nature Preserve (www.in.gov/dnr/naturepreserve/files/Dunes-color.pdf)

Iowa
• Devil's Backbone (Backbone State Park; www.iowadnr.gov/parks/)

Kansas
• Rocktown Trail (Wilson Reservoir; www.travelks.com)

Kentucky
• Ridge Trail (part of the Daniel Boone Trail; www.backpackcamp.com/CumberlandGap.html)

Louisiana
• Port Hudson State Historic Site (Fort Desperate; www.lastateparks.com)

Maine
• Gulf Hagas Gorge (www.visitmaine.com)
Maryland
• Billy Goat Trail (Chesapeake & Ohio Canal National Historical Park; www.nps.gov/choh)

Massachusetts
• Blue Hills Reservation (Quincy, Dedham, Milton and Randolph; (www.mass.gov/eea/agencies/dcr/massparks/region-south/blue-hills-reservation.html)

Michigan
• Scoville Point (Isle Royale National Park; www.nps.gov/isro)

Minnesota
• Superior Hiking Trail (www.shta.org)

Mississippi
• Cypress Swamp Trail (off the Natchez Trace Parkway about 20 miles north of Jackson; www.nps.gov/natr)

Missouri
• Ha Ha Tonka State Park (www.mostateparks.com)

Montana
• Highline Trail (Glacier National Park; www.nps.gov/glac)

Nebraska
• Toadstool Geologic Park (www.visitnebraska.gov)

Nevada
• Ruby Crest National Recreation Trail (Elko; www.exploreelko.com)

New Hampshire
• Champney Brook Trail (about 10 miles west of Conway; www.fs.fed.us/r9/forests/white_mountain)

New Jersey
• Green Trail (Cheesequake State Park; www.njhiking.com)

New Mexico
• Chaco Culture National Historic Park (www.nps.gov/chcu/)

New York
• Adirondacks (www.adk.org)
North Carolina
• Appalachian Trail (www.appalachiantrail.org)

North Dakota
• Maah Daah Hey Trail (www.mdhta.com)

Ohio
• Ledges Trail and Ohio & Erie Canal Towpath Trail (Cuyahoga Valley National Park; www.nps.gov/cuva)

Oklahoma
• Robbers Cave Trail (Robbers Cave State Park; www.oklahomaparks.com)

Oregon
• Deschutes National Forest (www.fs.usda.gov/centraloregon)

Pennsylvania
• Turkey Path (Leonard Harrison State Park; www.dcnr.state.pa.us)

Rhode Island
• Cliff Walk (Newport; www.gonewport.com)

South Carolina
• Magnolia Plantation & Gardens (Charleston; www.magnoliaplantation.com)

South Dakota
• Narrows Walking Trail (about 4 miles north of Lower Brule; www.lbst.org)

Tennessee
• Twin Arches Loop Trail (Big South Fork National River and Recreational Area; www.nps.gov/biso)

Texas
• Guadalupe Peak (Guadalupe Mountains National Park; www.nps.gov/gumo)

Utah
• Delicate Arch (Arches National Park; www.nps.gov/arch)

Vermont
• Mount Independence State Historic Site (www.historicvermont.org)

Virginia
• Old Rag (Shenandoah National Park; www.nps.gov/shen/)
Washington
• Olympic National Park’s Enchanted Valley
  (www.olympicpeninsulawaterfalltrail.com/enchanted-valley)

West Virginia
• Greenbrier River Trail (www.greenbrierrailtrailstatepark.com)

Wisconsin
• Rock Island State Park (http://dnr.wi.gov/topic/parks/name/rockisland)

Wyoming
• Mystic Falls Trail (Yellowstone National Park; www.nps.gov/yell)

A list of top national hiking trails is provided at www.rkma.com/HikingTrails.pdf.
61.1 Overview
Cities across the United States are building trails to encourage health and fitness among residents. Most popular are scenic multi-use trails that are used for walking, biking, and jogging.

According to 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 117.4 million people walk for fitness at least once a year – 37.5 million are casual participants (<50 times per year) and 79.8 million are core participants (>50 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>33.6 million</td>
<td>76.6 million</td>
</tr>
<tr>
<td>2009</td>
<td>34.5 million</td>
<td>76.4 million</td>
</tr>
<tr>
<td>2010</td>
<td>34.5 million</td>
<td>77.5 million</td>
</tr>
<tr>
<td>2011</td>
<td>34.6 million</td>
<td>78.1 million</td>
</tr>
<tr>
<td>2012</td>
<td>35.3 million</td>
<td>78.3 million</td>
</tr>
<tr>
<td>2013</td>
<td>37.5 million</td>
<td>79.5 million</td>
</tr>
</tbody>
</table>

Among those who participate in fitness walking, 63% are female, according to the National Sporting Goods Association (www.nsga.org). The highest percentage of regular walkers, 39%, are men age 65 and up.

Participation in biking and running/jogging are assessed in Chapters 6 and 48, respectively.

61.2 Rails-to-Trails
The movement to convert abandoned railroads into recreational trails has been fostered by the largest national trails organization in the nation, the 150,000-member Rails-to-Trails Conservancy (www.railstotrails.org). Linking citizen advocacy with state and county projects, the effort has claimed over 20,000 miles of former rail beds for trails, with more than 9,000 miles of potential rail-trails waiting to be built.

The Rails-to-Trails Conservancy recognizes the best trails across the U.S. with its Rails-Trails Hall of Fame. As of 2014, 27 trails had been designated, as follows:

- Bizz Johnson Trail (24.5 miles; Lassen County, CA; www.blm.gov/ca/st/en/fo/eaglelake/bizztrail.html)
- Burke-Gilman Trail (17 miles; Seattle to Bothell, WA; www.traillink.com/trail/burke-gilman-trail.aspx)
• East Bay Bicycle Path (14 miles; Bristol and Providence Counties, RI; www.riparks.com/eastbay.htm)
• Elroy-Sparta State Trail (32 miles; Juneau and Monroe Counties, WI; www.elroy-sparta-trail.com)
• Fred Marquis Pinellas Trail (34 miles; Tarpon Springs to South St. Petersburg, FL; www.pinellascounty.org/trailgd and www.pinellastrails.org)
• George S. Mickelson Trail (110 miles; Custer, Fall River, Lawrence, and Pennington Counties, SD; www.mickelsontrail.com)
• Great Allegheny Passage (150 miles; Cumberland, MD, to McKeesport, PA; www.atatrail.org)
• Greenbrier River Trail (78 miles; Cass to Caldwell, WV; www.greenbrierrailtrailstatepark.com)
• Historic Union Pacific Rail Trail State Park (28 miles; Park City to Echo Reservoir, UT; www.utah.com/stateparks/union_pacific.htm)
• Illinois Prairie Path (61 miles; DuPage, Kane, and Cook Counties, IL; www.ipp.org)
• Island Line (14 miles; Burlington to Colchester, VT; http://trailfinder.info/trail.php?id=1)
• Katy Trail State Park (225 miles; St. Charles to Clinton, MO; www.katytrailstatepark.com)
• Little Miami Scenic Trail (78 miles; Clark, Clermont, Greene, Hamilton, and Warren Counties, OH; www.miamivalleytrails.org/miami.htm)
• Longleaf Trace (40.2 miles; Hattiesburg to Prentiss, MS; www.mylonlongleaftrace.com)
• Minuteman Bikeway (10.4 miles; Middlesex County, MA; http://minutemanbikeway.org)
• Monon Trail (15.7 miles; Hamilton and Marion Counties, IN; www.indianatrails.org/Monon_Carmel.htm)
• Paul Bunyan State Trail (112 miles; Beltrami, Cass, Crow Wing, and Hubbard Counties, MN; www.dnr.state.mn.us/state_trails/)
• Peavine & Iron King Trails (9.2 miles; Yapavi, AZ; www.cityofprescott.net/services/parks/trails)
• Pere Marquette Rail-Trail of Michigan (30 miles; Midland and Isabella Counties, MI; www.lmb.org/pmrt)
• Prairie Spirit Rail Trail State Park (51 miles; Allen, Anderson, and Franklin Counties, KS; www.kdwp.state.ks.us/news/State-Parks/Locations/Prairie-Spirit-Trail)
• Silver Comet and Chief Ladiga trails (95 miles; Smyrna, GA, to Anniston, AL; www.silvercometqa.com and http://epic.jsu.edu/clt/index.html)
• Springwater Corridor (21.5 miles; Portland to Boring, OR; www.portlandonline.com/parks/finder/index.cfm?action=ViewPark&PropertyID=679)
• The High Line (1.5 miles; New York, NY; www.thehighline.org)
• Trail of the Coeur d’Alenes and Route of the Hiawatha (88 miles; Benewah, Kootenai, and Shoshone Counties, ID; http://friendsofcdatrails.org and http://parksandrecreation.idaho.gov)
• Virginia Creeper Trail (34 miles; Abingdon to Whitetop, VA; www.traillink.com/trail/virginia-creeper-national-recreation-trail.aspx)
• W&OD Trail (44.8 miles; Arlington, Fairfax, and Loudoun Counties, VA; www.nvrpa.org/parks/wod/index.php)
• Wabash Trace Nature Trail (63 miles; Fremont, Mills, Page, and Pottawattamie Counties, IA; www.wabashtrace.org)

61.3 Best City Trails
The following are among the best city trails in the United States:

Bayshore Boulevard (Tampa, FL)
• Bordering scenic Tampa Bay and the University of Tampa, Bayshore Boulevard is the longest uninterrupted sidewalk in the United States.

BeltLine (Atlanta, GA)
• The Atlanta BeltLine, a multi-use trail, is a 22-mile former railway corridor circling downtown and connecting many neighborhoods directly to each other. The initial sections of the BeltLine opened in 2011. While the sections nearest downtown are paved, some discontinuities remain and portions are in a rough state but hikeable. The trail has been used for temporary art installations.

Cliff Walk (Newport, RI)
• The 3.5-mile circuit starts at Memorial Boulevard, where rugged cliffs meet Easton’s Beach, and ends at Bailey’s Beach. The first third is paved and relatively flat; it takes hikers past Gilded Age mansions to the 70-room Italian Renaissance-style palazzo The Breakers. Only the sure-footed venture farther, where it’s necessary to hike over boulders alongside 70-foot drop-offs to the Atlantic Ocean.

Golden Gate Bridge (San Francisco, CA)
• Estimates suggest that over 1,000 people walk across the Golden Gate Bridge every day, making this one of the most popular leisure walks in the country. Over 300,000 people walked the bridge in the 75th anniversary celebration in May 2012. The round trip distance is 3.4 miles.

Mulholland Drive (Los Angeles, CA)
• High above the city, the eastern terminus of Mulholland Drive offers vistas of the Hollywood Sign, the Hollywood Bowl, downtown Los Angeles, and then, proceeding west, Burbank, Universal City, and the rest of the San Fernando Valley – with views of the San Gabriel, Verdugo, and Santa Susana Mountains.

Tidal Basin (Washington, DC)
• The nation’s capital has countless monuments, but few have as serene a setting as those dedicated to presidents Thomas Jefferson and Franklin D. Roosevelt, which flank the Tidal Basin. On a 1.5-mile loop from the National Mall, the monuments are ringed by a pathway planted with 1,678 cherry trees (a gift from Japan in 1912).
The High Line (New York, NY)
• The High Line (www.thehighline.org) is a public park built on an historic freight rail line elevated above the streets on Manhattan’s West Side. It is owned by the City of New York and maintained by Friends of the High Line. The High Line, which opened in 2009, runs from Gansevoort Street to West 20th Street. The final section of the High Line opened in September 2014.

____________________________________

“Built on an abandoned elevated train track in Manhattan, the public park proves that new life can be breathed into industrial-age relics. In 2013, more than 4 million people visited the park. More than $2 billion has been spent on development in nearby neighborhoods.”

Bloomberg Businessweek, 3/24/14

____________________________________

Venetian Causeway (Miami, FL)
• Five residential islands dredged from Biscayne Bay and seven bridges (two bascule bridges) make up the 2.8-mile causeway that links Miami and Miami Beach. The causeway is popular for walking, jogging, and bicycling. Dolphins, manatees, stingrays, and a variety of seabirds can be spotted in the bay. Miami Beach and Downtown Miami skylines along with cruise ships docked at the Port of Miami provide the backdrop.

According to Warwick Ford, author of Fun on Foot in America’s Cities (Wyltan Books), the following rank among the best city parks for walking:
• Balboa Park (San Diego, CA)
• Chain of Lakes (Minneapolis, MN)
• Charles River Reservation (Boston, MA)
• City Park (Denver, CO)
• Fairmont Park (Philadelphia, PA)
• Golden Gate Park (San Francisco, CA)
• Lincoln Park (Chicago, IL)
• Riverside Park (New York, NY)
• Rock Creek Park (Washington, DC)
• Washington Park Arboretum (Seattle, WA)
61.4 Top Walking Cities

The American Podiatric Medical Association and Prevention magazine did surveys of over 500 U.S. cities to determine which are the best walking cities. Criteria include green space, safe streets, walkable destinations, air quality, rails-to-trails programs, cleanliness, fitness walking percentage, and walking commuters. The Top Walking Cities ranked as follows:

1. San Francisco, CA
2. Boston, MA
3. New York, NY
4. Philadelphia, PA
5. Chicago, IL
6. Washington, DC
7. Seattle, WA
8. Honolulu, HI
9. Portland, OR
10. Pittsburgh, PA
11. Oakland, CA
12. Minneapolis, MN
13. San Diego, CA
14. Los Angeles, CA
15. Milwaukee, WI
16. Baltimore, MD
17. Rochester, NY
18. Santa Ana, CA
19. San Jose, CA
20. Denver, CO
21. Columbus, OH
22. New Orleans, LA
23. Austin, TX
24. Sacramento, CA
25. Tucson, AZ

61.5 Market Resources

Rails-to-Trails Conservancy, 2121 Ward Court NW, 5th Floor, Washington, DC 20037. (202) 331-9696. (www.railstotrails.org)
WILDLIFE WATCHING

62.1 Overview

The U.S. Fish and Wildlife Service (FWS, www.fws.gov) conducts the National Survey of Fishing, Hunting, and Wildlife Related Recreation every five years. The most recent report was published in September 2012. According to the survey, 71.8 million people ages 16 years old and older (30% of all Americans) fed, photographed, and observed wildlife during the 12-month period prior to the FWS survey, spending nearly $54.9 billion on their activities, an average of $981 per spender.

The FWS survey uses a strict definition of wildlife watching. Participants must either take a "special interest" in wildlife around their homes or take a trip for the "primary purpose" of wildlife watching. Secondary wildlife-watching activities such as incidentally observing wildlife while pleasure driving are not included.

Among those who watched wildlife, 96% did so at home or within one mile of their residence. In addition to observing wildlife, activities were as follows:

- Feed birds or other wildlife: 52.8 million
- Photograph wildlife: 25.4 million
- Maintain plantings or natural areas: 13.4 million
- Visit parks to observe wildlife: 12.3 million

In addition to watching wildlife at home, 22.5 million people traveled a mile or more to observe wildlife. Among those who traveled, types of wildlife observed were as follows:

- Birds: 18.9 million
  - Songbirds (cardinals, robins, etc.): 12.1 million
  - Birds of prey (hawks, eagles, etc.): 12.9 million
  - Waterfowl (ducks, geese, etc.): 13.3 million
  - Other water birds (shorebirds, herons, cranes, etc.): 10.6 million
  - Other birds (pheasants, turkeys, road runners, etc.): 6.8 million
- Total land mammals: 13.7 million
  - Large land mammals (deer, bear, etc.): 10.4 million
  - Small land mammals (squirrel, prairie dog, etc.): 10.3 million
- Fish (salmon, shark, etc.): 6.3 million
- Marine mammals (whales, dolphins, etc.): 4.0 million
- Other wildlife (turtles, butterflies, etc.): 10.1 million
### 62.2 State-by-State Assessment

The number of people, by state, who engaged in wildlife watching were as follows:

<table>
<thead>
<tr>
<th>State</th>
<th>Number</th>
<th>Pct.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>1.07 million</td>
<td>29%</td>
</tr>
<tr>
<td>Alaska</td>
<td>247,000</td>
<td>47%</td>
</tr>
<tr>
<td>Arizona</td>
<td>1.28 million</td>
<td>25%</td>
</tr>
<tr>
<td>Arkansas</td>
<td>828,000</td>
<td>37%</td>
</tr>
<tr>
<td>California</td>
<td>6.47 million</td>
<td>23%</td>
</tr>
<tr>
<td>Colorado</td>
<td>1.45 million</td>
<td>37%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>1.09 million</td>
<td>39%</td>
</tr>
<tr>
<td>Delaware</td>
<td>209,000</td>
<td>30%</td>
</tr>
<tr>
<td>Florida</td>
<td>3.59 million</td>
<td>24%</td>
</tr>
<tr>
<td>Georgia</td>
<td>2.20 million</td>
<td>30%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>161,000</td>
<td>16%</td>
</tr>
<tr>
<td>Idaho</td>
<td>464,000</td>
<td>40%</td>
</tr>
<tr>
<td>Illinois</td>
<td>2.78 million</td>
<td>28%</td>
</tr>
<tr>
<td>Indiana</td>
<td>1.68 million</td>
<td>34%</td>
</tr>
<tr>
<td>Iowa</td>
<td>780,000</td>
<td>33%</td>
</tr>
<tr>
<td>Kansas</td>
<td>776,000</td>
<td>36%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>1.22 million</td>
<td>36%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>840,000</td>
<td>24%</td>
</tr>
<tr>
<td>Maine</td>
<td>401,000</td>
<td>38%</td>
</tr>
<tr>
<td>Maryland</td>
<td>1.22 million</td>
<td>27%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>1.53 million</td>
<td>29%</td>
</tr>
<tr>
<td>Michigan</td>
<td>3.07 million</td>
<td>39%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>1.49 million</td>
<td>36%</td>
</tr>
<tr>
<td>Mississippi</td>
<td>630,000</td>
<td>28%</td>
</tr>
<tr>
<td>Missouri</td>
<td>1.64 million</td>
<td>35%</td>
</tr>
<tr>
<td>Montana</td>
<td>258,000</td>
<td>33%</td>
</tr>
<tr>
<td>Nebraska</td>
<td>362,000</td>
<td>26%</td>
</tr>
<tr>
<td>Nevada</td>
<td>504,000</td>
<td>25%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>388,000</td>
<td>36%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>1.70 million</td>
<td>25%</td>
</tr>
<tr>
<td>New Mexico</td>
<td>486,000</td>
<td>31%</td>
</tr>
<tr>
<td>New York</td>
<td>4.08 million</td>
<td>26%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>2.12 million</td>
<td>29%</td>
</tr>
<tr>
<td>North Dakota</td>
<td>152,000</td>
<td>30%</td>
</tr>
<tr>
<td>Ohio</td>
<td>3.15 million</td>
<td>35%</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>1.23 million</td>
<td>44%</td>
</tr>
<tr>
<td>Oregon</td>
<td>1.23 million</td>
<td>40%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>3.32 million</td>
<td>33%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>270,000</td>
<td>32%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>944,000</td>
<td>27%</td>
</tr>
</tbody>
</table>
62.3 Birdwatching

Over the past 10 years, birdwatching, also known as birding, has become a billion-dollar industry, and it is recognized as the second fastest-growing outdoor activity in America, behind gardening.

The American Birding Association (www.americanbirding.org) estimates that there are 50 million to 70 million birdwatchers in the U.S. The association has 18,000 members.

The makeup of birders stretches far and wide. People who indulge in birding range from lifetime birders to backyard birders. There are those who go birding locally, enjoying the birds native to their region, and others who travel the globe in search of rare and migrating birds found only in remote locations. And it’s not just seniors who enjoy birding, as was once believed.

Baby Boomers have flooded the hobby, and many do it in style. They tend to drive their own cars to sites, stay at boutique hotels or B&Bs, and treat themselves to gourmet meals and boat tours. They equip themselves with an arsenal of books on birding (there are hundreds) and the latest binoculars. Middle-aged parents with small children also have embraced birding while on vacation, and many young people will likely continue enjoying the hobby throughout their lifetime.

While many birders will trudge through the muckiest of marshes in hopes of spotting a rare species, there are birding trails for those who prefer a less rugged birding experience. These trails, which mark sites along specific foot or driving paths where birds are spotted, can enhance the birding experience for many, especially novices.

The American Birding Association identifies over 42 birding trails on its website. Nearly 25 states have driving routes – or birding trails – specifically dedicated to the pastime. These formal trails are just over a decade old, having begun in Texas in 1996, when the first of three segments of the Great Texas Coastal Birding Trail was developed. The recent unveiling of a new Mississippi Coastal Birding Trail Map, which highlights 50 birdwatching hot spots in the six southernmost counties in Mississippi, was a major step for ecotourism in the region. According to Bruce Reid, deputy state director of Audubon Mississippi (http://ms.audobon.com), wildlife watching, including birding, is worth more than $450 million to the state.
Festivals are also a significant part of birding, with over 200 major birding festivals held throughout the United States, many drawing thousands of participants. Revenues for the annual Rio Grand Birding Festival, one of the larger events, exceed $1.6 million, according to the Texas Parks and Wildlife Dept. (www.tpwd.state.tx.us).

Birding centers and bird sanctuaries also make up part of the birding-watching environment. Typically developed to complement a wildlife refuge, these sites are a big draw for birders.

Annually, the National Audubon Society (www.audubon.org), the world’s largest, oldest, and best-known organization focusing on birds, hosts over 20 trips through its Audubon Nature Odysseys.

Among birders, the elite are dubbed ‘superbirders,’ a group fewer than a dozen who have seen more than 7,000 of the 9,600 known species of birds.

Until recently, birdwatchers would head into the woods with little more equipment than binoculars, a notebook, and perhaps a camera with a zoom lens. For many traditionalists the whole point of birding is to commune with nature. For many modern birders, however, the hobby wouldn’t be complete without a touch of technology. Some would not think of birding without a digital camera, a Palm device with a bird-species database, and an iPod loaded with bird songs. There are also laser pointers used to identify birds perched on high branches, devices that play birdcalls, and parabolic microphones to pinpoint the location of distant birds. Professional alerting services, already popular in the United Kingdom, are springing up in the U.S. to allow hardcore hobbyists to receive notices of local sightings on their smartphones.

### 62.4 Backyard Habitats

People can register their home or apartment as a Certified Backyard Habitat (www.nwf.org/How-to-Help/Garden-for-Wildlife/Create-a-Habitat.aspx) through the National Wildlife Federation. To qualify, a yard or apartment balcony must provide food, water, cover, and a place for wildlife to raise their young. As of September 2014, 170,000 backyards had been certified.

### 62.5 Market Resources

National Wildlife Federation, P.O. Box 1583, Merrifield, VA 22116. (800) 822-9919. (www.nwf.org)

63.1 Market Assessment

According to the 2014 SFIA Participation Topline Report, published by the Sports & Fitness Industry Association (www.sfia.org), 24.3 million people practice yoga at least once a year – 14.1 million are casual participants (<50 times per year) and 10.2 million are core participants (>50 times per year). Participation has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Casual</th>
<th>Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>10.7 million</td>
<td>7.0 million</td>
</tr>
<tr>
<td>2009</td>
<td>11.1 million</td>
<td>7.8 million</td>
</tr>
<tr>
<td>2010</td>
<td>12.0 million</td>
<td>9.0 million</td>
</tr>
<tr>
<td>2011</td>
<td>12.5 million</td>
<td>9.6 million</td>
</tr>
<tr>
<td>2012</td>
<td>13.3 million</td>
<td>9.9 million</td>
</tr>
<tr>
<td>2013</td>
<td>14.1 million</td>
<td>10.2 million</td>
</tr>
</tbody>
</table>

Yoga in America, a study published in 2012 by Yoga Journal based on surveys by Sports Marketing Surveys USA (www.sportsmarketingsurveysusa.com), estimated there are 20.4 million yoga practitioners. Total spending is $10.7 billion, an 88% increase from five years prior and distributed as follows:

- Instruction: $2.6 billion
- Equipment: $2.3 billion
- Clothing: $2.2 billion
- Other: $3.6 billion

The following are findings of the study:

- Eighty-two percent (82%) of practitioners are women; 62% are age 18-to-44.
- Thirty-eight percent (38%) have practiced yoga for one year or less; 29% have practiced for one to three years; 33% have practiced for three years or longer.
- The following are top reasons for practicing yoga
  - Flexibility: 78%
  - General conditioning: 62%
  - Stress relief: 60%
  - Improve overall health: 58%
  - Physical fitness: 55%
63.2 Yoga Studios
According to IBISWorld (www.ibisworld.com), there are 26,506 yoga studios in the United States; combined revenue is $7 billion.

The following are online directories of yoga studios:
• http://yogafinder.com
• http://yogastudios.directory/directory-for-yoga-studios/
• www.everythingyoga.com/studios.aspx
• www.yogajournal.com/directory

63.3 Top Towns for Yoga
According to Yoga Journal, the following metropolitan areas have the highest yoga participation index (i.e., an index of 159 indicates residents are 59% more likely to do yoga than the general population):
• San Francisco-Oakland-San Jose, CA: 159
• Seattle-Tacoma, WA: 146
• Philadelphia, PA: 142
• New York City: 134
• Washington, DC: 134
• Baltimore, MD: 128
• Boston, MA: 126
• Portland, OR: 123
• Boise, ID: 121
• San Diego, CA: 121

Yoga Journal also identifies the following cities where yoga practice is thriving:
• Asheville, NC
• Austin, TX
• Boulder, CO
• Encinitas, CA
• Minneapolis, MN
• New Orleans, LA
• Portland, OR
• Salt Lake City, UT
• Washington, DC
• Woodstock, NY

63.4 Market Resources
(www.ibisworld.com/industry/pilates-yoga-studios.html)
64.1 Market Assessment

The American Zoo and Aquarium Association (AZA, www.aza.org) reports that combined annual attendance for all 214 AZA-accredited zoos and aquariums in the United States is 175 million.

Two million households in America, some five million people, are zoo or aquarium members, collectively providing over $96 million in support.

More than nine million students visit and enjoy on-site education programs at zoos and aquariums each year; over 3.5 million attend them free of charge.

About 80% of visitors to zoos live in the zoo’s home market and 20% are tourists, according to the AZA. Aquariums experience the opposite visitor ratio; approximately 80% of visitors are tourists and 20% live in the aquariums’s home market. There are notable exceptions to these ratios. The Memphis Zoo, which averages about 950,000 visitors each year, found in 2013 that 67% of zoo visitors came from outside the Memphis area.

64.2 Most-Visited Zoos and Aquariums

The following are the largest U.S. zoos, based on annual attendance:

- San Diego Zoo (San Diego, CA; www.sandiegozoo.org): 3.4 million
- Lincoln Park Zoo (Chicago, IL; www.lpzoo.org): 3.0 million
- Saint Louis Zoo (St. Louis, MO; www.stlzoo.org): 2.8 million
- Smithsonian National Zoological Park (Washington, DC; http://nationalzoo.si.edu): 2.7 million
- Bronx Zoo (New York, NY; www.bronxzoo.com): 2.4 million
- Brookfield Zoo (Brookfield, IL; www.brookfieldzoo.org): 2.0 million
- Denver Zoo (Denver, CO; www.denverzoo.org): 1.7 million
- Los Angeles Zoo (Los Angeles, CA; www.lazoo.org): 1.5 million
- Columbus Zoo (Columbus, OH; www.columbuszoo.org): 1.4 million
- Houston Zoo (Houston, TX; www.houstonzoo.org): 1.4 million
- Cleveland Metroparks Zoo (Cleveland, OH; www.clevelandmetroparks.com/zoo): 1.3 million
- Milwaukee County Zoo (Milwaukee, WI; www.milwaukeezoo.org): 1.3 million
The following are the largest U.S. aquariums, based on annual attendance:

- Georgia Aquarium (Atlanta; www.georgiaaquarium.org): 2.0 million
- Monterey Bay Aquarium (Monterey, CA; www.montereybayaquarium.org): 1.8 million
- John G. Shedd Aquarium (Chicago, IL; www.sheddaquarium.org): 1.7 million
- National Aquarium in Baltimore: (Baltimore, MD; www.aqua.org): 1.6 million
- New England Aquarium (Boston, MA; www.neaq.org): 1.3 million
- Aquarium of the Pacific (Long Beach; www.aquariumofpacific.org): 1.1 million
- Tennessee Aquarium (Chattanooga; www.tnaqua.org): 1.1 million
- Downtown Aquarium (Denver, CO; www.aquariumrestaurants.com): 1.0 million
- Aquarium of the Americas (New Orleans; www.auduboninstitute.org/visit/aquarium): 1.0 million
- Newport Aquarium (Newport, KY; www.newportaquarium.com): 1.0 million
- Mystic Aquarium (Mystic, CT; www.mysticaquarium.org): 1.0 million

### 64.3 Accredited Zoos and Aquariums
The following links to a list of zoos and aquariums accredited by the AZA: www.rkma.com/travel.ZoosAquariums.pdf.

### 64.4 Market Resources
American Zoo and Aquarium Association, 8403 Colesville Road, Suite 760, Silver Spring, MD 20910. (301) 562-0777. (www.aza.org)
APPENDIX A

ACADEMIC PROGRAMS

Barry University
• School of Human Performance and Leisure Sciences Program, 11300 NE 2\textsuperscript{nd} Avenue, Miami Shores, FL 33161. (www.barry.edu/hpls)

Bowling Green State University

California State University - Long Beach
• Recreation and Leisure Studies, 1250 Bellflower Boulevard, Long Beach, CA 90840. (www.csulb.edu/colleges/chhs/departments/recreation-and-leisure-studies)

Clemson University
• Leisure Skills Program, Department of Parks, Recreation, and Tourism Management, 296 Lehotsky Hall, Clemson, SC 29634. (www.clemson.edu/hehd/departments/prtm/leisureskills/index.html)

Elon University
• Department of Leisure & Sport Management, Powell Building 223, Elon, NC 27244. (www.elon.edu/e-web/academics/communications/sport-event-mgt/default.xhtml)

Grambling State University
• Leisure Studies Program, Department of Kinesiology, Sport, and Leisure Studies, 403 Main Street, Grambling, LA 71245. (www.gram.edu/academics/majors/education/departments/kinesiology)

Howard University
• Department of Health, Human Performance and Leisure Studies, Sixth and Girard Streets NW, Washington, DC 20059. (www.coas.howard.edu/hhpl/LeisureStudies.htm)

Indiana University
• Department of Recreation, Park, and Tourism Studies, 1025 E. 7\textsuperscript{th} Street, HPER 133, Bloomington, IN 47405. (www.indiana.edu/~recpark/index.shtml)
Minnesota State University
• Department of Recreation, Parks & Leisure Services, 213 Highland Center North, Mankato, MN 56001. (http://ahn.mnsu.edu/rpls/)

Montclair State University
• Leisure and Tourism Program, Finley Hall, Montclair, NJ 07043. (http://business.montclair.edu/departments/marketing/leisure-and-tourism-programs)

North Carolina State University
• Parks, Recreation and Tourism Management, Box 8004, Biltmore Hall, Raleigh, NC 27695. (http://cnr.ncsu.edu/prtm/)

Northern Arizona University
• Tourism and Leisure Planning, College of Social and Behavioral Sciences, South San Francisco Street, Flagstaff AZ 86011. (www.nau.edu)

Oklahoma State University
• Leisure Studies Graduate Program, Colvin Recreation Center, Stillwater, OK 74078. (https://education.okstate.edu/rmtr)

San Diego State University
• L. Robert Payne School of Hospitality and Tourism Management, PSFA Building, Room 436, San Diego, CA 92182. (http://rtm.sdsu.edu/)

San Francisco State University
• Recreation and Leisure Studies, Department of Recreation, Parks & Tourism, 1600 Holloway Avenue - HSS 307, San Francisco, CA 94132. (http://recdept.sfsu.edu/)

SUNY College at Brockport
• Department of Recreation and Leisure Studies, 350 New Campus Drive, Brockport, NY 14420. (www.brockport.edu/leisure/)

SUNY College at Cortland
• Recreation, Parks and Leisure Studies, Professional Studies Building, P.O. Box 2000, Cortland, NY 13045. (www2.cortland.edu/departments/recreation/)

University of Georgia
• Recreation & Leisure Studies Program, 343 Ramsey Center, 300 River Road, Athens, GA 30602. (www.coe.uga.edu/chds/academic-programs/recreation-and-leisure-studies/)
University of Iowa
  • Leisure Studies Program, 424 Field House, Iowa City, IA 52242
    (www.uiowa.edu/~leisure/)

University of Nevada, Las Vegas
  • Sport and Leisure Service Management, William F. Harrah College of Hotel
    Administration, 4505 S. Maryland Parkway, Las Vegas, NV 89154.
    (http://catalog.unlv.edu/preview_program.php?catoid=3&poid=805&returnto=225)

University of North Texas
  • Recreation and Leisure Studies, Toulouse Graduate School, Denton, TX 76203.
    (www.unt.edu/pais/grad/grecr.htm)

University of Northern Iowa
  • Leisure, Youth and Human Services, School of Health, Physical Education, &
    Leisure Services, WRC 213, Cedar Falls, IA 50614.
    (www.uni.edu/coe/departments/school-health-physical-education-leisure-services)

University of Utah
  • Department of Parks, Recreation and Tourism, 1901 E. South Campus Drive,
    Annex C, Room 1085, Salt Lake City, UT 84112.  (www.health.utah.edu/prt/)

American Bus Association, 111 K Street NE, 9th Floor, Washington, DC 20002. (202) 842-1645. (www.buses.org)


American Public Gardens Association, 351 Longwood Road, Kennett Square, PA 19348. (610) 708-3010. (www.publicgardens.org)


American Sportfishing Association, 1001 North Fairfax Street, Suite 501, Alexandria VA 22314. (703) 519-9691. (www.asafishing.org)

American Zoo and Aquarium Association, 8403 Colesville Road, Suite 710, Silver Spring, MD 20910. (301) 562-0777. (www.aza.org)

Americans for the Arts, 1000 Vermont Avenue NW, 6th Floor, Washington, DC 20005. (202) 371-2830. (www.americansforthearts.org)

Craft & Hobby Association, 319 East 54th Street, Elmwood Park, NJ 07407. (201) 835-1200. (www.craftandhobby.org)


International Association of Amusement Parks and Attractions, 1448 Duke Street, Alexandria, VA 22314. (703) 836-4800. (www.iaapa.org)

International Association of Fairs and Expositions, 3043 East Cairo Street, Springfield, MO 65802. (417) 862-5771. (www.fairsandexpos.com)
International Health, Racquet & Sportsclub Association, 70 Fargo Street, Boston, MA 02210. (800) 228-4772. [www.ihrsa.org]

International Spa Association, 2365 Harrodsburg Road, Suite A325, Lexington, KY 40504. (859) 226-4326. [www.experienceispa.com]

Leisure Studies Association, c/o Myrene McFee, The Chelsea School, University of Brighton, Eastbourne, U.K., BN20 7SP. Tel: 01323 640 357. [www.leisurestudies.org]


Motorcycle Industry Council, 2 Jenner Street, Suite 150, Irvine, CA 92618. (949) 727-4211. [www.mic.org]

National Association of Music Merchants, 5790 Armada Drive, Carlsbad, CA 92008. (760) 438-8001. [www.namm.com]

National Bicycle Dealers Association, 3176 Pullman Street, #117, Costa Mesa, CA 92626. (949) 722-6909. [www.nbda.com]

National Endowment for the Arts, 400 7th Avenue SW, Washington, DC 20506. (202) 682-5400. [www.arts.gov]

National Federation of State High School Associations, P.O. Box 690, Indianapolis, IN 46206. (317) 972-6900. [www.nfhs.org]

National Gardening Association, 237 Commerce Street, Suite 101, Williston, VT 05495. (802) 863-5251. [www.garden.org]

National Golf Foundation, 1150 South US Highway One, Suite 401, Jupiter, FL 33477. (561) 744-6006. [www.ngf.org]

National Marine Manufacturers Association, 231 S. LaSalle Street, Chicago, IL 60604. (312) 946-6200. [www.nmma.org]

National Recreation and Park Association, 22377 Belmont Ridge Road, Ashburn, VA 20148. (800) 626-6772.


National Shooting Sports Foundation, 11 Mile Hill Road, Newtown, CT 06470. (203) 426-1320. [www.nssf.org]
Photo Marketing Association, 2282 Springport Road, Suite F, Jackson, MI 49201. (517) 788-8100. (www.pmai.org)

Recreation Vehicle Industry Association, 1896 Preston White Drive, Reston, VA 20191. (703) 620-6003. (www.rvia.org)

Recreational Boating & Fishing Foundation, 500 Montgomery Street, Suite 300, Alexandria, VA 22314. (703) 519-0013. (http://takemefishing.org)

Sports & Fitness Industry Association, 8505 Fenton Street, Suite 211, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)

The Broadway League, 729 Seventh Avenue, 5th Floor, New York, NY 10019. (212) 764-1122. (www.broadwayleague.com)

Trust For Public Land, 660 Pennsylvania Avenue SE, Suite 401, Washington, DC 20003. (202) 543-7552. (www.tpl.org)

Toy Industry Association, 1115 Broadway, Suite 400, New York, NY 10010. (212) 675-1141. (www.toyassociation.org)

Urban Land Institute, 1025 Thomas Jefferson Street NW, Suite 500 West, Washington, DC 20007. (202) 624-7000. (www.uli.org)


World Leisure Organization, 203 Wellness/Recreation Center, University of Northern Iowa, Cedar Falls, IA 50614. (319) 273-6279. (www.worldleisure.org)

World Waterpark Association, 8826 Santa Fe Drive, Suite 310 Overland Park, KS 66212. (913) 599-0300. (www.waterparks.org)
APPENDIX C

MARKET ANALYSTS

eMarketer, 11 Times Square, New York, NY 10036. (212) 763-6010. (www.emarketer.com)

EPM Communications, 19 W. 21st Street, Suite 303, New York, NY 10010. (212) 941-0099. (www.epmcom.com)

First Research, Hoover’s Inc., 5800 Airport Boulevard, Austin, TX 78752. (866) 788-9389. (www.firstresearch.com)

Forrester Research, 60 Acorn Park, Cambridge, MA 02140. (617) 613-5730. (www.forrester.com)


GfK, 200 Liberty Street, New York, NY 10281. (212) 993-5300. (www.gfk.com/us)

Harris Interactive, a Nielsen Company, 161 Sixth Avenue, New York, NY 10013. (585) 272-8400. (www.harrisinteractive.com)

IBISWorld, 40 Wall St, New York, NY 10005. (800) 330-3772. (www.ibisworld.com)

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediaaudit.com)

Ipsos, 1271 Avenue of the Americas, 15th Floor, New York, NY 10020. (212) 265-3200. (www.ipsos.com)


Marist College Institute for Public Opinion, Poughkeepsie, NY 12601. (845) 575-5050. (www.maristpoll.marist.edu)

Pew Research Center, 1615 L Street NW, Washington, DC 20036. (202) 419-4300. (www.pewresearch.org)
Pollstar, 4697 West Jacquelyn Avenue, Fresno, CA 93722. (559) 271-7900. (www.pollstar.com)


Scarborough Research, a Nielsen Company, 770 Broadway, New York, NY 10003. (646) 654-8400. (www.scarborough.com)

Sports Marketing Surveys USA, 6650 W. Indiantown Road, Suite 220, Jupiter, FL 33458. (561) 427-0647. (www.sportsmarketingsurveysusa.com)


The Nielsen Company, 85 Broad Street, New York, NY 10004. (800) 864-1224. (www.nielsen.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)
APPENDIX D

PARKS & RECREATION ASSOCIATIONS

Alabama
Alabama Recreation & Parks Association, P.O. Box 230579, Montgomery, AL 36123. (334) 279-9160. (www.arpaonline.org)

Alaska
Alaska Recreation & Parks Association, P.O. Box 100161, Anchorage, AK 99510. (www.alaskaarpa.org)

Arizona
Arizona Parks & Recreation Association, 1422 N. 44th Street, Suite 211, Phoenix, AZ 85008. (602) 335-1962. (www.azpra.org)

Arkansas
Arkansas Recreation & Parks Association, P.O. Box 326, Fayetteville, AR 72702. (501) 416-6700. (www.arkarpa.org)

California
California Park & Recreation Society, 7971 Freeport Boulevard, Sacramento, CA 95832. (www.cprs.org)

Colorado
Colorado Recreation & Parks Association, P.O. Box 1037, Wheat Ridge, CO 80034. (303) 231-0943. (www.cpra-web.org)

Connecticut

Florida
Florida Recreation & Parks Association, 411 Office Plaza Drive, Tallahasee, FL 32301. (850) 878-3221. (http://web.frpa.org)

Georgia
Georgia Recreation & Park Association, 1285 Parker Road, Conyers, GA 30094. (770) 760-1403. (www.grpa.org)
Hawaii
Hawaii Recreation & Parks Association, P.O. Box 283208, Honolulu, HI 96828. (808) 768-3025. (www.hawaiiparks.org)

Illinois
Illinois Association of Park Districts, 211 E. Monroe Street, Springfield, IL 62701. (217) 523-4554. (www.ilparks.org)

Illinois Parks & Recreation Association, 1815 S. Meyers Road, Suite 400, Oakbrook Terrace, IL 60181. (630) 376-1911. (www.il-ipra.org)

Indiana
Indiana Park & Recreation Association, P.O. Box 888, Cicero, IN 46034. (317) 984-4500. (www.inpra.org)

Iowa
Iowa Recreation & Parks Association, 1534 Penrose Street, Grinnell, IA 50112. (515) 236-3917. (www.iowaparkandrecreation.org)

Kansas
Kansas Recreation & Parks Association, 700 Jackson, Suite 805, Topeka, KS 66603. (785) 235-6533. (www.krpa.org)

Kentucky
Kentucky Recreation & Park Society, 213 St. Clair, Suite 204, Frankfort, KY 40601. (502) 696-9834. (www.kyrec.org)

Louisiana
Louisiana Recreation & Parks Association, 629 North Main Street, MS 39401. (800) 810-3882. (www.lrpa.net)

Maine
Maine Recreation & Parks Association, c/o University of Maine at Machias, 9 O’Brien Avenue, Machias, ME 4654. (207) 725-1726. (http://merpa.org)

Maryland
Maryland Recreation & Parks Association, 2000 Shorefield Road, Wheaton, MD 20902. (301) 942-7203. (www.mrpanet.org)

Massachusetts
Massachusetts Recreation & Parks Association, P.O. Box 783, Westfield, MA 01086. (413) 568-8356. (www.massrpa.org)
Michigan

Minnesota
Minnesota Recreation & Parks Association, 200 Charles Street NE, Fridley, MN 55432. (763) 571-1305. (www.mnrpa.org)

Mississippi
Mississippi Recreation & Parks Association, 629 N. Main Street, Hattiesburg, MS 39401. (601) 582-3361. (www.aboutmrpa.org)

Missouri
Missouri Recreation & Parks Association, 2018 William Street, Jefferson City, MO 65109. (573) 636-3828. (www.mopark.org)

Montana
Montana Recreation & Parks Association, P.O. Box 1704, Helena, MT 59624. (www.mtrpa.info)

Nebraska
Nebraska Recreation & Parks Association, 1819 Farnam Street, Suite 701, Omaha, NE 68183. (402) 444-5933. (www.nerpa.us)

Nevada
Nevada Recreation & Park Society, P.O. Box 97264, Las Vegas, NV 89193. (702) 455-7513. (www.nrps.org)

New Jersey
New Jersey Recreation & Parks Association, 13 April Lane, Somerset, NJ 08873. (732) 568-1270. (www.njrpa.org)

New York
New York Recreation & Parks Society, 19 Roosevelt Drive, Suite #200, Saratoga Springs, NY 12866. (518) 584-0321. (www.nysrps.org)

North Carolina

North Dakota
North Dakota Recreation & Parks Association, 1605 E. Capitol Avenue, Bismarck, ND 58501. (701) 355-4458. (www.ndrpa.org)
Ohio
Ohio Parks & Recreation Association, 1069A W Main Street, Westerville, OH 43081. (614) 895-2222. (www.opraonline.org)

Oklahoma
Oklahoma Recreation & Parks Association, P.O. Box 1201, Sand Springs, OK 74063. (918) 245-5756. (www.orps.net)

Oregon
Oregon Recreation & Parks Association, 1515 16th Street NE, Salem, OR 97301. (503) 375-6107. (www.orpa.org)

Pennsylvania
Pennsylvania Recreation & Parks Society, 2131 Sandy Drive, State College, PA 16823. (814) 234-5276. (www.prps.org)

Tennessee
Tennessee Recreation & Parks Association, 718 Boyd Mill Avenue, Franklin, TN 37064. (615) 790-0041. (www.trpa.net)

Texas
Texas Recreation & Parks Society, P.O. Box 5188, Jonestown, TX 78645. (512) 267-5550. (www.traps.org)

Utah
Utah Recreation & Parks Association, 296 West 700 South, Springville, UT 84663. (801) 491-9867. (www.urpa.org)

Vermont
Vermont Recreation & Parks Association, 721 Main Street, Colchester, VT 05446. (802) 878-2077. (www.vrpa.org)

Virginia
Virginia Recreation & Parks Society, 6372 Mechanicsville Turnpike, Suite 109, Mechanicsville, VA 23111. (804) 730-9447. (www.vrps.com)

Washington

West Virginia
West Virginia Recreation & Parks Association, 133 Circle Drive, Bridgeport, WV 26330. (304) 669-3181. (www.wvrpa.org)
Wisconsin
Wisconsin Parks & Recreation Association, 6601-C Northway, Greendale, WI 53129. (414) 423-1210. (www.wpraweb.org)

Wyoming
Wyoming Recreation & Parks Association, 1775 Hitching Post Drive, Green River, WY 82935. (www.wyorpa.com)
## APPENDIX E

### VENUES - AMPHITHEATERS

<table>
<thead>
<tr>
<th></th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alabama</strong></td>
<td></td>
</tr>
<tr>
<td>• Verizon Wireless Music Center (Pelham):</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>Arizona</strong></td>
<td></td>
</tr>
<tr>
<td>• AVA Amphitheater (Tucson):</td>
<td>4,500</td>
</tr>
<tr>
<td>• Cricket Wireless Pavilion (Phoenix):</td>
<td>20,000</td>
</tr>
<tr>
<td>• Mesa Amphitheatre:</td>
<td>4,200</td>
</tr>
<tr>
<td>• Sun Bowl Amphitheatre:</td>
<td>n/a</td>
</tr>
<tr>
<td><strong>Arkansas</strong></td>
<td></td>
</tr>
<tr>
<td>• Riverfest Amphitheater (Little Rock):</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>California</strong></td>
<td></td>
</tr>
<tr>
<td>• Cricket Wireless Amphitheatre (Chula Vista):</td>
<td>19,500</td>
</tr>
<tr>
<td>• Gibson Amphitheatre (Universal City):</td>
<td>6,189</td>
</tr>
<tr>
<td>• Greek Theatre (Los Angeles):</td>
<td>5,700</td>
</tr>
<tr>
<td>• Hearst Greek Theatre (Berkeley):</td>
<td>8,500</td>
</tr>
<tr>
<td>• Hollywood Bowl (Los Angeles):</td>
<td>17,376</td>
</tr>
<tr>
<td>• Humphrey’s By The Bay (San Diego):</td>
<td>1,200</td>
</tr>
<tr>
<td>• John Anson Ford Amphitheatre (Los Angeles):</td>
<td>1,245</td>
</tr>
<tr>
<td>• Moonlight Amphitheater (Vista):</td>
<td>2,500</td>
</tr>
<tr>
<td>• Mount Helix Amphitheater (San Diego):</td>
<td>n/a</td>
</tr>
<tr>
<td>• Pacific Amphitheater (Costa Mesa):</td>
<td>8,500</td>
</tr>
<tr>
<td>• Pioneer Amphitheatre (Hayward):</td>
<td>n/a</td>
</tr>
<tr>
<td>• Ramona Bowl Amphitheatre (Helmet):</td>
<td>5,000</td>
</tr>
<tr>
<td>• San Manuel Amphitheater (Devore):</td>
<td>65,000</td>
</tr>
<tr>
<td>• Santa Barbara Bowl:</td>
<td>4,562</td>
</tr>
<tr>
<td>• Shoreline Amphitheatre (Mountain View):</td>
<td>22,000</td>
</tr>
<tr>
<td>• Sleep Train Amphitheatre in Wheatland:</td>
<td>18,500</td>
</tr>
<tr>
<td>• Sleep Train Pavilion at Concord:</td>
<td>12,500</td>
</tr>
<tr>
<td>• Starlight Bowl (Burbank):</td>
<td>5,000</td>
</tr>
<tr>
<td>• Starlight Bowl (San Diego):</td>
<td>4,300</td>
</tr>
<tr>
<td>• Verizon Wireless Amphitheatre (Irvine):</td>
<td>16,085</td>
</tr>
</tbody>
</table>
Colorado
• Fiddler's Green Amphitheatre (Englewood): 17,916
• Gerald R. Ford Amphitheatre (Vail): n/a
• Red Rocks Amphitheatre (Morrison): 9,450

Connecticut
• Comcast Theatre (Hartford): 30,000

District of Columbia
• Carter Barron Amphitheater: 4,200

Florida
• 1-800-ASK-GARY Amphitheatre (Tampa): 20,000
• Cruzan Amphitheatre (West Palm Beach): 19,000
• Hollywood Hills Amphitheater (Lake Buena Vista): 10,000
• St. Augustine Amphitheatre: 4,100

Georgia
• Aaron's Amphitheatre at Lakewood (Atlanta): 19,000
• Chastain Park Amphitheater (Atlanta): 6,900
• Northwest Georgia Bank Amphitheatre (Ringgold): 3,500
• Verizon Wireless Amphitheatre at Encore Park (Alpharetta): 12,000

Hawaii
• Waikiki Shell (Honolulu): 6,000

Illinois
• Charter One Pavilion at Northerly Island (Chicago): 7,500
• First Midwest Bank Amphitheatre (Tinley Park): 28,000
• Jay Pritzker Pavilion (Chicago): 11,000
• SkyLine Stage at Navy Pier (Chicago): 1,200

Indiana
• Mesker Amphitheatre (Evansville): 8,500
• Slayter Center of Performing Arts (West Lafayette): 20,000
• Verizon Wireless Music Center (Noblesville): 24,000

Kansas
• Sandstone Amphitheater (Bonner Springs): 18,000

Kentucky
• Iroquois Amphitheatre (Louisville): 2,407
Maine
• Seaside Pavilion (Old Orchard Beach): n/a

Maryland
• Merriweather Post Pavilion (Columbia): 16,500

Massachusetts
• Bank of America Pavilion (Boston): 5,000
• Cape Cod Melody Tent (Hyannis): 2,300
• Comcast Center (Mansfield): 19,900

Michigan
• Chene Park (Detroit): 6,000
• DTE Energy Music Theatre (Clarkston): 15,200
• Meadowbrook Music Festival at Oakland University (Rochester): 7,000

Missouri
• Starlight Theatre (Kansas City): 8,105
• The Muny (St. Louis): 11,000
• Verizon Wireless Amphitheater St. Louis (Maryland Heights): 21,000

New Hampshire
• Meadowbrook U.S. Cellular Pavilion (Gilford): 6,500

New Jersey
• PNC Bank Arts Center (Holmdel): 17,500
• Susquehanna Bank Center (Camden): 25,000

New York
• Artpark Outdoor Amphitheater (Lewiston): 20,000
• Bethel Woods Amphitheatre (Bethel): 10,500
• Constellation Brands – Marvin Sands Performing Arts Center (Canandaigua): 15,000
• Darien Lake (Darien): 21,600
• Nikon at Jones Beach Theater (Wantagh): 15,000
• Saratoga Performing Arts Center (Saratoga Springs): 25,100

North Carolina
• Carolina Crossroads Amphitheater (Roanoke Rapids): 1,500
• Downtown Raleigh Amphitheater: 5,500
• Koka Booth Amphitheatre at Regency Park (Cary): 7,000
• Raleigh Little Theatre: 2,148
• Time Warner Cable Music Pavilion (Raleigh): 20,000
• Verizon Wireless Amphitheatre (Charlotte): 18,700

Ohio
• Blossom Music Center (Cuyahoga Falls): 19,000
• Celeste Center (Columbus): 10,000
• Fraze Pavilion (Kettering): 4,300
• National City Pavilion (Cincinnati): 4,100
• Nautica Pavilion (Cleveland): 5,000
• Riverbend Music Center (Cincinnati): 20,500
• Timberwolf Amphitheater (Mason): 7,400
• Time Warner Cable Amphitheater (Cleveland): 5,000

Oregon
• Cuthbert Amphitheatre (Eugene): 4,500
• L.B. Day Amphitheatre (Salem): n/a

Pennsylvania
• First Niagara Pavilion (Burgettstown): 23,000
• Tom Ridge Pavilion at Mountain Laurel Center for the Performing Arts (Bushkill): 5,500

Tennessee
• Mud Island (Memphis): 5,000
• Overton Park Shell (Memphis): n/a

Texas
• Cynthia Woods Mitchell Pavilion (Woodlands): 17,000
• Gexa Energy Pavilion (Dallas): 20,111
• SuperPages.com Center (Dallas): 20,111
• Verizon Wireless Amphitheatre (Selma): n/a

Utah
• The Castle (Provo): 1,000
• Tuacahn Amphitheatre (Ivins): 1,920
• USANA Amphitheatre (West Valley City): 20,000

Virginia
• Arlington Memorial Amphitheater: 5,000
• Classic Amphitheatre at Strawberry Hill (Richmond): 10,000
• Farm Bureau Live at Virginia Beach: 20,000
• Filene Center at Wolf Trap National Park for the Performing Arts (Vienna): 15,000
• Jiffy Lube Live (Bristow): 25,000
• Lake Matoaka Amphitheatre (Williamsburg): 1,700
**Washington**

- The Amphitheater at Clark County (Washington): 16,500
- The Gorge Amphitheatre (George): 20,000
- White River Amphitheatre (Auburn): 20,000

**Wisconsin**

- Alpine Valley Music Theatre (East Troy): 37,000
- Float-Rite Park Amphitheatre (Somerset): n/a
- Marcus Amphitheater (Milwaukee): 25,000
## APPENDIX F

### VENUES - ARENAS

<table>
<thead>
<tr>
<th>State</th>
<th>Arena</th>
<th>Capacity</th>
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<tr>
<td>Arizona</td>
<td>US Airways Center (Phoenix)</td>
<td>18,422</td>
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<tr>
<td>California</td>
<td>ARCO Arena (Sacramento)</td>
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<td></td>
<td>Honda Center (Anaheim)</td>
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<td></td>
<td>Oracle Arena (San Francisco)</td>
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<td>SAP Center (San Jose)</td>
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<td></td>
<td>Staples Center (Los Angeles)</td>
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<td>Colorado</td>
<td>Pepsi Center (Denver)</td>
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<td>District of Columbia</td>
<td>Verizon Center</td>
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<td>Florida</td>
<td>American Airlines Arena (Miami)</td>
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<td>Amway Arena (Orlando)</td>
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<td>BB&amp;T Center (Sunrise)</td>
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<td>St. Pete Times Forum (St. Petersburg)</td>
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<td>Georgia</td>
<td>Philips Arena (Atlanta)</td>
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<td>Illinois</td>
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<td>Indiana</td>
<td>Conseco Fieldhouse (Indianapolis)</td>
<td>18,345</td>
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<td>Louisiana</td>
<td>Smoothie King Center (Louisiana)</td>
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Massachusetts
• TD Garden (Boston): 17,565

Michigan
• Joe Louis Arena (Detroit): 20,066

Minnesota
• Target Center (Minneapolis): 20,500
• Xcel Energy Center (Saint Paul): 18,064

Missouri
• Scottrade Center (St. Louis): 19,150

New Jersey
• Prudential Center (Newark): 17,625
• Red Bull Arena (Harrison): 25,189

New York
• First Niagara Center (Buffalo): 18,690
• Madison Square Garden (New York): 19,743
• Nassau Veterans Memorial Coliseum (Uniondale): 16,250
• The Barclays Arena (Brooklyn): 18,103

North Carolina
• PNC Arena (Raleigh): 18,680
• Time Warner Cable Arena (Charlotte): 19,568

Ohio
• Nationwide Arena (Columbus): 18,144
• Quicken Loans Arena (Cleveland): 20,562

Oklahoma
• Ford Center (Oklahoma City): 18,203

Oregon
• Providence Park (Portland): 20,674

Pennsylvania
• Consol Energy Center (Pittsburgh): 18,087
• Wells Fargo Center (Philadelphia): 20,444
Tennessee
• Bridgestone Arena (Nashville): 17,113
• FedEx Forum (Memphis): 18,165

Texas
• American Airlines Center (Dallas): 19,200
• AT&T Center (San Antonio): 18,797
• Toyota Center (Houston): 18,370

Utah
• EnergySolutions Center (Salt Lake): 19,991

Wisconsin
• Bradley Center (Milwaukee): 18,717
APPENDIX G

VENUES - PERFORMING ARTS CENTERS

Alabama
• Alys Robinson Stephens Performing Arts Center (Birmingham; www.alysstephens.org)
• Von Braun Center (Huntsville; www.vonbrauncenter.com)

Alaska
• Alaska Center for the Performing Arts (Anchorage; www.myalaskacenter.org)

Arizona
• Del E. Webb Center for the Performing Arts (Wickenburg; www.delewebbcenter.org)
• Grady Gammage Memorial Auditorium, Arizona State University (Tempe; www.asugammage.com)
• Mesa Arts Center (Mesa; www.mesaartscenter.com)
• Symphony Hall (Phoenix; http://phoenix.gov/conventioncenter/symphonyhall.com)
• Tempe Center For The Arts (Tempe; www.tempe.gov/index.aspx?page=575)

Arkansas
• Robinson Center Music Hall (Little Rock; www.littlerockmeetings.com/conv-centers/robinson/)

California
• Alex Theatre (Glendale; www.alextheatre.org)
• Arlington Center for the Performing Arts (Santa Barbara; http://thearlingtontheatre.com)
• Bovard Auditorium, University of Southern California (Los Angeles; www.usc.edu/student-affairs/bovardauditorium/)
• California Center for the Arts (Escondido; www.artcenter.org)
• California Theatre (San Jose; www.operasj.org)
• Carpenter Performing Arts Center, California State University (Long Beach; www.carpenterarts.org)
• Cerritos Center for the Performing Arts (Cerritos; www.cerritoscenter.com)
• Christopher Cohan Center for the Performing Arts (San Luis Obispo; www.pacslo.org)
• Copley Symphony Hall (San Diego; www.sandiegosymphony.org/copleysymphonyhall/)
• Orange County Performing Arts Center (Costa Mesa; www.ocpac.org)
• Mondavi Center (Davis; www.mondaviarts.org)
• Lincoln Theatre (Yountville; www.lincolntheatre.org)
• Los Angeles Music Center - Dorothy Chandler Pavilion and Walt Disney Concert Hall (Los Angeles; www.musiccenter.org)
• Pasadena Civic Auditorium (Pasadena; www.thepasadenacivic.com)
• Royce Hall, University of California Los Angeles (Los Angeles; www.uclalive.org)
• San Francisco War Memorial and Performing Arts Center (San Francisco; http://sfwmpac.org)
• San Jose Center for the Performing Arts (San Jose; www.sanjose.org/plan-a-meeting-event/venues/center-performing-arts)
• San Jose Civic Auditorium (San Jose; www.sanjosecivic.com)
• Sunset Center for the Performing Arts (Carmel-by-the-Sea; www.sunsetcenter.org)
• Terrace Theater, Long Beach Convention and Entertainment Center (Long Beach; www.longbeachcc.com/static/index.cfm?contentID=1206&navid=1200)
• Thousand Oaks Civic Arts Plaza, Fred Kavli Theatre for the Performing Arts (Thousand Oaks; www.civicartsplaza.com)
• Wells Fargo Center for the Arts (Santa Rosa; http://wellsfargocenterarts.org)

Colorado
• Denver Performing Arts Complex (Denver; www.artscomplex.com)
• Pikes Peak Center (Colorado Springs; www.pikespeakcenter.org)

Connecticut
• Bushnell Center for the Performing Arts (Hartford; www.bushnell.org)
• Regina A. Quick Center for the Arts (Fairfield; www.quickcenter.com)
• Stamford Center for the Arts (Stamford; www.stamfordcenterforthearts.org)
• Woolsey Hall, Yale University (New Haven; http://music.yale.edu/resources/woolsey.html)

Delaware
• Grand Opera House (Wilmington; www.thegrandwilmington.org)

District of Columbia
• DAR Constitution Hall (www.dar.org/conthall)
• John F. Kennedy Center for the Performing Arts (www.kennedy-center.org)

Florida
• Adrienne Arsht Center for the Performing Arts (Miami; www.arshtcenter.org)
• Bob Carr Performing Arts Centre (Orlando; www.orlandovenues.net/other_info_files/bob_carr_centre.php)
• Broward Center for the Performing Arts (Fort Lauderdale; www.browardcenter.org)
• Curtis M. Phillips Center for the Performing Arts, University of Florida (Gainesville; http://performingarts.ufl.edu)
• New World Center (Miami Beach, FL; www.newworldcenter.com)
• Raymond F. Kravis Center for the Performing Arts (West Palm Beach; www.kravis.org)
• Richard B. Baumgardner Center for the Performing Arts, Ruth Eckerd Hall (Clearwater; www.rutheckerdhall.com)
• The David A. Straz, Jr. Center for the Performing Arts (Tampa; www.tbpac.org)
• The Fillmore at Jackie Gleason Theater (Miami Beach, FL; www.fillmoremb.com)
• Times-Union Center for the Performing Arts (Jacksonville; www.jaxevents.com/timesunion.php)

Georgia
• Cobb Energy Performing Arts Centre (Atlanta; www.cobbenergycentre.com)
• Fox Theatre Auditorium (Atlanta; www.foxtheatre.org)
• Gwinnett Center - Performing Arts Center (Duluth; www.gwinnettcener.com)
• Woodruff Arts Center (Atlanta; www.woodruffcenter.org)

Hawaii
• Neal S. Blaisdell Center (Honolulu; www.blaisdellcenter.com)

Idaho
• Morrison Center for the Performing Arts, Boise State University (Boise; http://mc.boisestate.edu/calendar.html)

Illinois
• Coronado Theatre (Rockford; www.coronadotheatre.org)
• Krannert Center for the Performing Arts (Urbana; www.kcpa.uiuc.edu)
• Pick-Staiger Concert Hall, Northwestern University (Chicago; www.pickstaiger.org)
• Symphony Center (Chicago; www.cso.org)

Indiana
• Hilbert Circle Theatre (Indianapolis; http://hilbertcircletheatreindy.org)
• The Center for the Performing Arts (Carmel; http://thecenterfortheperformingarts.org)

Iowa
• Adler Theatre, River Center (Davenport; www.adlertheatre.com)
• Bucksbaum Center for the Arts (Grinnell; http://web.grinnell.edu/finearts/bucksbaum.html)
• Paramount Theater (Cedar Rapids; www.paramounttheatrecr.com)

Kansas
• Century II Performing Arts & Convention Center (Wichita; www.century2.org)
Kentucky
- The Kentucky Center, Whitney Hall (Louisville; www.kentuckycenter.org)
- The Louisville Palace (Louisville; www.louisvillepalace.com)

Louisiana
- Baton Rouge River Center, Theatre for the Performing Arts (Baton Rouge; www.brrivercenter.com)

Maine
- Collins Center for the Arts (Orono; www.collinscenterforthearts.com)

Maryland
- Clarice Smith Performing Arts Center, University of Maryland (College Park; http://claricesmithcenter.umd.edu/2010)
- Hippodrome (Baltimore; www.hippodromefoundation.org)
- Joseph Meyerhoff Symphony Hall (Baltimore; www.bsomusic.org)
- Maryland Theater (Hagerstown; www.mdtheatre.org)
- Modell Performing Arts Center at the Lyric (Baltimore; www.modellpac.com)
- Strathmore Arts Center (Rockville; www.strathmore.org)

Massachusetts
- Boston Opera House (Boston; http://bostonoperahouseonline.com)
- Citi Performing Arts Center (Boston; http://citicenter.org)
- Sanders Theatre, Harvard University (Cambridge; www.fas.harvard.edu/~memhall/sanders.html)
- Symphony Hall (Boston; www.bostonsymphonyhall.org)
- Symphony Hall (Springfield; www.symphonyhall.com)

Michigan
- Detroit Opera House (Detroit; www.michiganopera.org)
- Flint Cultural Center, The Whiting (Flint; www.flintculturalcenter.com/about_us.html)
- Ford Community and Performing Arts Center (Dearborn; www.dearbornfordcenter.com)
- Fox Theatre (Detroit; www.olympiaentertainment.com)
- Max M. Fisher Music Center (Detroit; www.detroitsymphony.com)
- McMorran Place Sports & Entertainment Center (Port Huron; www.mcmorran.com)
- Music Hall Center for the Performing Arts (Detroit; www.musichall.org)
- The Fillmore Detroit (Detroit; http://thefillmoredetroit.com)
- Wharton Center for Performing Arts, Michigan State University (East Lansing; www.whartoncenter.com)
Minnesota
- Duluth Entertainment Convention Center, Auditorium (Duluth; www.decc.org)
- Orchestra Hall (Minneapolis; www.minnesotaorchestra.org)
- Ordway Center for the Performing Arts (Saint Paul; www.ordway.org)

Mississippi
- Bologna Performing Arts Center, Delta State University (Cleveland; http://bolognapac.com)
- Gertrude C. Ford Center for the Performing Arts, University of Mississippi (Oxford; www.fordcenter.org)

Missouri
- Kauffman Center for the Performing Arts (Kansas City; www.kauffmancenter.org)
- Missouri Theatre Center for the Arts (Columbia; www.motheatre.org)
- Powell Symphony Hall (St. Louis; www.stlsymphony.org)

Nebraska
- Holland Performing Arts Center (Omaha; www.omahaperformingarts.org/holland-center/)
- Lied Center for Performing Arts (Lincoln; www.liedcenter.org)

Nevada
- Performing Arts Center, University of Nevada Las Vegas, Artemus W. Ham Concert Hall (Las Vegas; http://pac.unlv.edu/venues_artemus.php)

New Hampshire
- Capitol Center for the Arts (Concord; www.ccanh.com)

New Jersey
- New Jersey Performing Arts Center (Newark; www.njpac.org)
- Newark Symphony Hall (Newark; www.newarksymphonyhall.org/index.php)

New Mexico
- Center for the Arts, University of New Mexico (Albuquerque; http://music.unm.edu/unm_music/facilities/index.htm)
- Lensic Theater (Santa Fe; www.lensic.com)

New York
- Anderson Center for the Performing Arts, Binghamton University (Binghamton; www2.binghamton.edu/anderson-center/)
- Carnegie Hall (New York City; www.carnegiehall.org)
- Crouse-Hinds Theater, Oncenter (Syracuse; http://oncenter.org)
• Eastman Theatre (Rochester; http://www.esm.rochester.edu/concerts/eastman_theatre.php)
• Elaine Kaufman Cultural Center (New York City; http://kaufman-center.org)
• Howard Gillman Opera House, Brooklyn Academy of Music (Brooklyn; http://www.bam.org)
• Kleinhans Music Hall (Buffalo; http://www.bpo.org/meet/kleinhans.php)
• Kupferberg Center for the Arts, Queens College (New York City; http://kupferbergcenter.org)
• Lincoln Center for the Performing Arts (New York City; http://www.lincolncenter.org)
• New York City Center (New York City; http://www.nycitycenter.org)
• Peter J. Sharp Theater, Juilliard School (New York City; http://www.juilliard.edu)
• Saratoga Performing Arts Center (Saratoga Springs; http://www.spac.org)
• Symphony Space (New York City; http://wwwсимфонийспейс.org)
• Troy Savings Bank Music Hall (Troy; http://www.troymusichall.org)

North Carolina
• North Carolina Blumenthal Performing Arts Center (Charlotte; http://www.performingartsctr.org)
• Progress Energy Center for the Performing Arts (Raleigh; http://www.progressenergycenter.com)

Ohio
• Aronoff Center (Cincinnati; http://www.cincinnatiarts.org/venues/aronoff)
• Benjamin and Marian Schuster Performing Arts Center (Dayton; http://www.schustercenter.org)
• DeYor Performing Arts Center (Youngstown; http://www.youngstownsymphony.com)
• Ohio Theatre (Columbus; http://www.capa.com/venues/ohio-theatre/theatre-history)
• Peristyle, Toledo Museum of Art (Toledo; http://www.toledomuseum.org)
• Severance Hall (Cleveland; http://www.clevelandorchestra.com/about/about-severance-hall.aspx)
• Springer Auditorium, Music Hall (Cincinnati; http://www.cincinnatiarts.org/musicall)
• The Renaissance (Mansfield; http://www.mansfieldtickets.com)

Oklahoma
• Thelma Gaylord Performing Arts Theatre, Civic Center Music Hall (Oklahoma City; http://www.okcciviccenter.com)
• Tulsa Performing Arts Center (Tulsa; http://www.tulsapac.com)

Oregon
• Hult Center for the Performing Arts (Eugene; http://www.hultcenter.org)
• Keller Auditorium (Portland; http://www.pcpa.com/events/keller.php)
• Portland Center for the Performing Arts (Portland; http://www.pcpa.com)
• The John G. Shedd Institute for the Arts (Eugene; http://www.theshedd.org)
Pennsylvania
• Academy of Music (Philadelphia; www.academyofmusic.org/home.php)
• Allentown Symphony Hall (Allentown; www.allentownsymphony.org)
• Benedum Center (Pittsburgh; www.pgharts.org/venues/benedum.aspx)
• Heinz Hall for the Performing Arts (Pittsburgh; www.pittsburghsymphony.org)
• Kimmel Center for the Performing Arts (Philadelphia; www.kimmelcenter.org)
• Pasquerilla Performing Arts Center (Johnstown; www.upj.pitt.edu/277)
• Penn State University Center for the Performing Arts (State College; www.cpa.psu.edu/)
• The Forum (Harrisburg; http://harrisburgsymphony.org)
• Warner Theatre (Erie; www.erieevents.com/about/warner_theatre.htm)
• Zoellner Arts Center (Bethlehem; www.zoellnerartscenter.org)

South Carolina
• Koger Center for the Arts (Columbia; www.koger.sc.edu)
• Peace Center for the Performing Arts (Greenville; www.peacecenter.org)

Tennessee
• Cannon Center for the Performing Arts (Memphis; www.thecannoncenter.com)
• Schermerhorn Symphony Center (Nashville; http://schermerhorncenter.com)
• Tennessee Theatre (Knoxville; www.tennesseetheatre.com)

Texas
• AT&T Performing Arts Center (Dallas; www.attpac.org)
• Bass Performance Hall (Fort Worth; www.basshall.com)
• Charles W. Eisemann Center for Performing Arts (Richardson; www.eisemanncenter.com)
• Cullen Performance Hall, University of Houston (Houston; www.uh.edu/cph)
• Jones Hall (Houston; www.houstonfirsttheaters.com/JonesHall.aspx)
• Julie Rogers Theater (Beaumont; www.beaumont-tx-complex.com/julierogerstheatre.html)
• Long Center for the Performing Arts (Austin; www.thelongcenter.org)
• Majestic Theatre & Empire Theatre (San Antonio; www.majesticempire.com)
• MetroCenter (Arlington; http://metrocenter.fielder.org/)
• Morton H. Meyerson Symphony Center (Dallas; www.meyersonsymphonycenter.com)
• Murchison Performing Arts Center (Denton; http://music.unt.edu/mpac)
• University of Texas Performing Arts Center (Austin; www.utpac.org)

Utah
• Abravanel Hall (Salt Lake City; www.utahsymphony.org)
• Cache Valley Center for the Arts, Ellen Eccles Theatre (Logan; www.centerforthearts.us)
Virginia
• Chrysler Hall (Norfolk; www.sevenvenues.com/about/history/chrysler)
• Ferguson Center for the Arts (Newport News; www.cnu.edu/fergusoncenter)
• Wolf Trap National Park for the Performing Arts (Vienna; www.nps.gov/wotr)

Washington
• Benaroya Hall (Seattle; www.seattlesymphony.org/benaroya)
• Fox Theater (Spokane; www.foxtheaterspokane.com)
• Pantages Theatre (Tacoma; http://pantages-theater.com)

West Virginia
• Clay Center for the Arts & Sciences (Charleston; www.theclaycenter.org)

Wisconsin
• Marcus Center (Milwaukee; www.marcuscenter.org)
• Overture Center (Madison; www.overturecenter.com)
• Stefanie H. Weill Center for the Performing Arts (Sheboygan; www.weillcenter.com)
• Weidner Center (Green Bay; www.uwgb.org/weidner)
APPENDIX H

VENUES - RACETRACKS

Alabama
• Talladega Superspeedway (Talladega)

Arizona
• Phoenix International Raceway (Avondale)

California
• Auto Club Speedway (Fontana)
• Infineon Raceway (Sonoma)
• Mazda Raceway Laguna Seca (Monterey)
• Toyota Speedway at Irwindale (Irwindale)

Connecticut
• Stafford Motor Speedway (Stafford Springs)
• Thompson International Speedway (Thompson)
• Waterford Speedbowl (Waterford)

Delaware
• Dover International Speedway (Dover)

Florida
• Daytona International Speedway (Daytona Beach)
• Gainesville Raceway (Gainesville)
• Homestead-Miami Speedway (Homestead)

Georgia
• Atlanta Motor Speedway (Hampton)

Illinois
• Chicagoland Speedway (Joliet)
• Gateway International Raceway (Madison)

Indiana
• Indianapolis Motor Speedway (Indianapolis)
• O’Reilly Raceway Park (Indianapolis)
Kansas
• Kansas Speedway (Kansas City)

Kentucky
• Kentucky Speedway (Sparta)

Louisiana
• Baton Rouge Raceway (Baker)

Maine
• Beech Ridge Motor Speedway (Scarborough)
• Oxford Plains Speedway (Oxford)

Massachusetts
• Seekonk Speedway (Seekonk)

Michigan
• Michigan International Speedway (Brooklyn)

Nevada
• Las Vegas Motor Speedway (Clark County)

New Hampshire
• New Hampshire Motor Speedway (Loudon)

New Jersey
• New Egypt Speedway (New Egypt)
• Old Bridge Township Raceway Park (Old Bridge)
• Wall Township Speedway (Wall Township)

New York
• Watkins Glen International (Watkins Glen)

North Carolina
• Charlotte Motor Speedway (Concord)
• Rockingham Speedway (Rockingham)

Ohio
• Mansfield Motorsports Park (Mansfield)

Oregon
• Portland International Raceway (Portland)
Pennsylvania
• Pocono Raceway (Long Pond)

South Carolina
• Darlington Raceway (Darlington)

Tennessee
• Bristol Motor Speedway (Bristol)
• Memphis Motorsports Park (Millington)
• Nashville Superspeedway (Lebanon)

Texas
• Texas Motor Speedway (Justin)

Vermont
• Thunder Road International SpeedBowl (Barre)

Virginia
• Martinsville Speedway (Martinsville)
• Richmond International Raceway (Richmond)

Wisconsin
• Lake Geneva Raceway (Lake Geneva)
• Milwaukee Mile (West Allis)
• Road America (Elkhart Lake)
## APPENDIX I

### VENUES - STADIUMS

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<tr>
<td>• Chase Field (Phoenix):</td>
<td>49,033</td>
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<tr>
<td>• University of Phoenix Stadium (Phoenix):</td>
<td>63,400</td>
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<table>
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<tr>
<th>California</th>
<th>Capacity</th>
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<tr>
<td>• Angel Stadium of Anaheim (Anaheim):</td>
<td>45,050</td>
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<tr>
<td>• AT&amp;T Park (San Francisco):</td>
<td>42,271</td>
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<td>• Buck Shaw Stadium (Santa Clara):</td>
<td>10,300</td>
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<td>• Candlestick Park (San Francisco):</td>
<td>70,207</td>
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<tr>
<td>• Dodger Stadium (Los Angeles):</td>
<td>56,000</td>
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<tr>
<td>• O.co Coliseum (Oakland):</td>
<td>63,026</td>
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<tr>
<td>• PETCO Park (San Diego):</td>
<td>42,445</td>
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<td>• Qualcomm Stadium (San Diego):</td>
<td>71,294</td>
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<td>• StubHub Center (Carson):</td>
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<th>Colorado</th>
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<td>• Coors Field (Denver):</td>
<td>50,445</td>
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<td>• Dick’s Sporting Goods Park (Commerce City):</td>
<td>18,086</td>
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<td>• Sports Authority Field at Mile High (Denver):</td>
<td>76,125</td>
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<tr>
<td>• Nationals Park:</td>
<td>41,888</td>
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<td>• RFK Stadium:</td>
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<tbody>
<tr>
<td>• EverBank Field (Jacksonville):</td>
<td>67,164</td>
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<td>• Marlins Park (Miami):</td>
<td>36,742</td>
</tr>
<tr>
<td>• Raymond James Stadium (Tampa):</td>
<td>65,857</td>
</tr>
<tr>
<td>• Sun Life Stadium (Miami):</td>
<td>75,192</td>
</tr>
<tr>
<td>• Tropicana Field (St. Petersburg):</td>
<td>36,973</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Georgia</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Georgia Dome (Atlanta):</td>
<td>71,228</td>
</tr>
<tr>
<td>• Turner Field (Atlanta):</td>
<td>50,097</td>
</tr>
</tbody>
</table>
Hawaii
• Aloha Stadium (Honolulu): 50,000

Illinois
• Soldier Field (Chicago): 61,500
• Toyota Park (Bridgeview): 20,000
• U.S. Cellular Field (Chicago): 40,615
• Wrigley Field (Chicago): 41,160

Indiana
• Lucas Oil Stadium (Indianapolis): 66,153

Kansas
• Sporting Park (Kansas City): 18,467

Louisiana
• Mercedes-Benz Superdome (Louisiana): 72,928

Maryland
• FedEx Field (Landover): 91,704
• M&T Bank Stadium (Baltimore): 71,008
• Oriole Park at Camden Yards (Baltimore): 48,876

Massachusetts
• Fenway Park (Boston): 37,402
• Gillette Stadium (Foxboro): 68,756

Michigan
• Comerica Park (Detroit): 41,982
• Ford Field (Detroit): 64,500
• The Palace of Auburn Hills (Auburn Hills): 22,076

Minnesota
• Hubert H. Humphrey Metrodome (Minneapolis): 64,121
• Target Field (Minneapolis): 39,504

Missouri
• Arrowhead Stadium (Kansas City): 79,451
• Busch Stadium (St. Louis): 43,975
• Edward Jones Dome (St. Louis): 66,965
• Kauffman Stadium (Kansas City): 39,000
New Jersey
• MetLife Stadium (East Rutherford): 82,566
• Prudential Center (Newark): 17,625
• Red Bull Arena (Harrison): 25,189

New York
• Citi Field (New York): 41,800
• Ralph Wilson Stadium (Orchard Park): 73,967
• Yankee Stadium (Bronx): 50,086

North Carolina
• Bank of America Stadium (Charlotte): 73,778

Ohio
• FirstEnergy Stadium (Cleveland): 73,200
• Columbus Crew Stadium (Columbus): 20,455
• Great American Ball Park (Cincinnati): 42,271
• Paul Brown Stadium (Cincinnati): 65,790
• Progressive Field (Cleveland): 45,199

Pennsylvania
• Citizens Bank Park (Philadelphia): 43,647
• Heinz Field (Pittsburgh): 65,050
• Lincoln Financial Field (Philadelphia): 69,144
• PNC Park (Pittsburgh): 38,496
• PPL Park (Philadelphia): 18,500

Tennessee
• LP Field (Nashville): 69,143

Texas
• AT&T Stadium (Arlington): 80,000
• BBVA Stadium (Houston): 32,000
• Globe Life Park (Arlington): 49,170
• Minute Maid Park (Houston): 40,950
• Pizza Hut Park (Dallas): 21,193
• Reliant Stadium (Houston): 71,500

Utah
• Rio Tinto Stadium (Salt Lake): 20,008
Washington

- CenturyLink Field (Seattle): 67,000
- Safeco Field (Seattle): 47,116

Wisconsin

- Lambeau Field (Green Bay): 72,928
- Miller Park (Milwaukee): 41,900
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