Section I – Market Assessment

Ballard*King & Associates (B*K), as part of the Woodburn Community Center expansion study, has completed a market assessment for the project.

Demographics

The following is a summary of the demographic characteristics within areas identified as the Primary and Secondary Service Areas. The incorporated city limits of Woodburn are the boundaries of the Primary Service Area. The Secondary Service Area is a between 5 and 6 miles beyond the city limits extending past Hubbard to the northeast, Mt. Angel to the south, Gervais in the southwest and St. Paul to the northwest.

B*K accesses demographic information from Environmental Systems Research Institute (ESRI) who utilizes 2010 Census data and their demographers for 2019-2024 projections. In addition to demographics, ESRI also provides data on housings, recreation, and entertainment spending and adult participation in activities. B*K also uses information produced by the National Sporting Goods Association (NSGA) to overlay onto the demographic profile to determine potential participation in various activities.

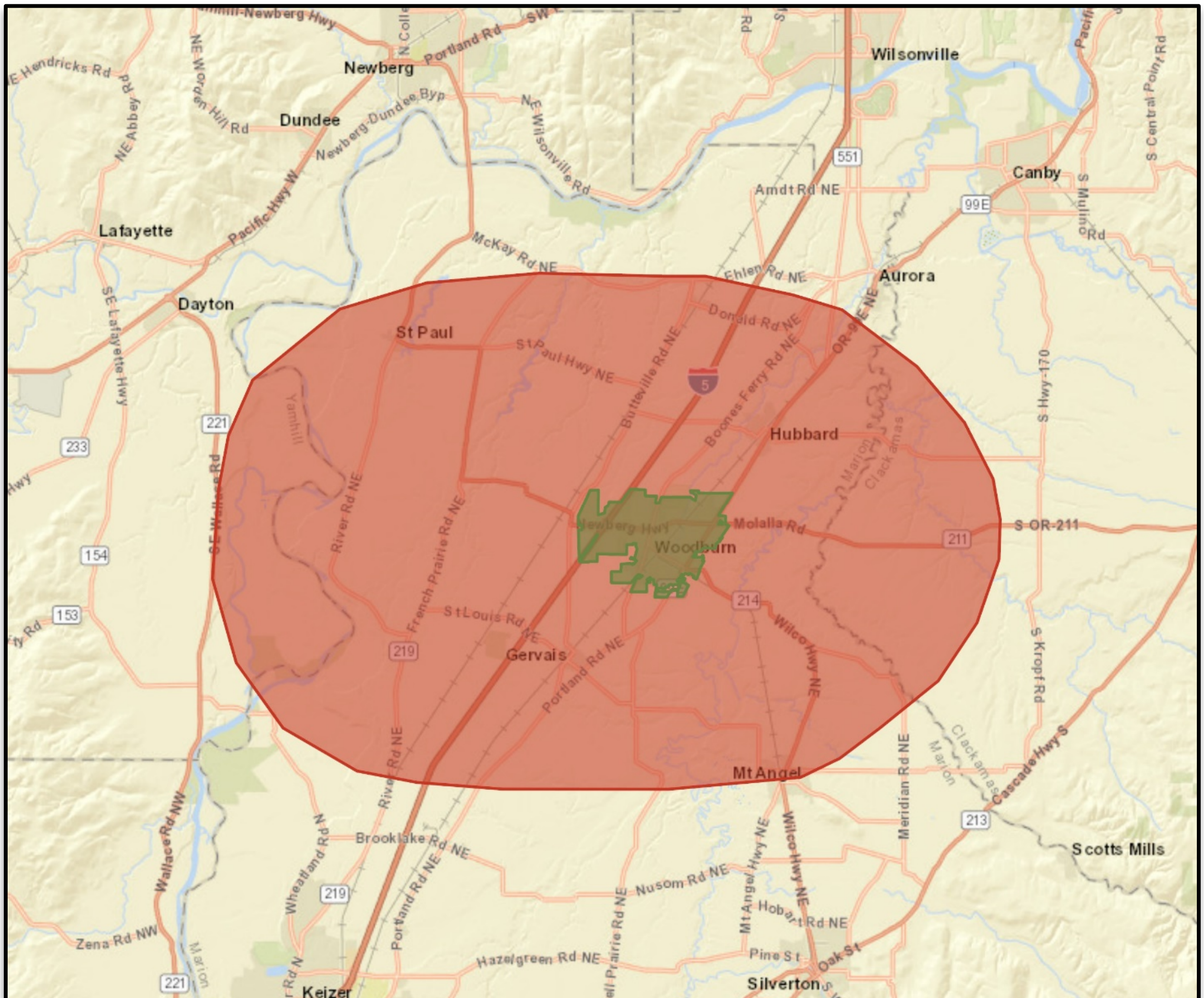
The information provided includes the basic demographics and data for Woodburn with comparison data for the Secondary Service Area as well as the State of Oregon and the United States.

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

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

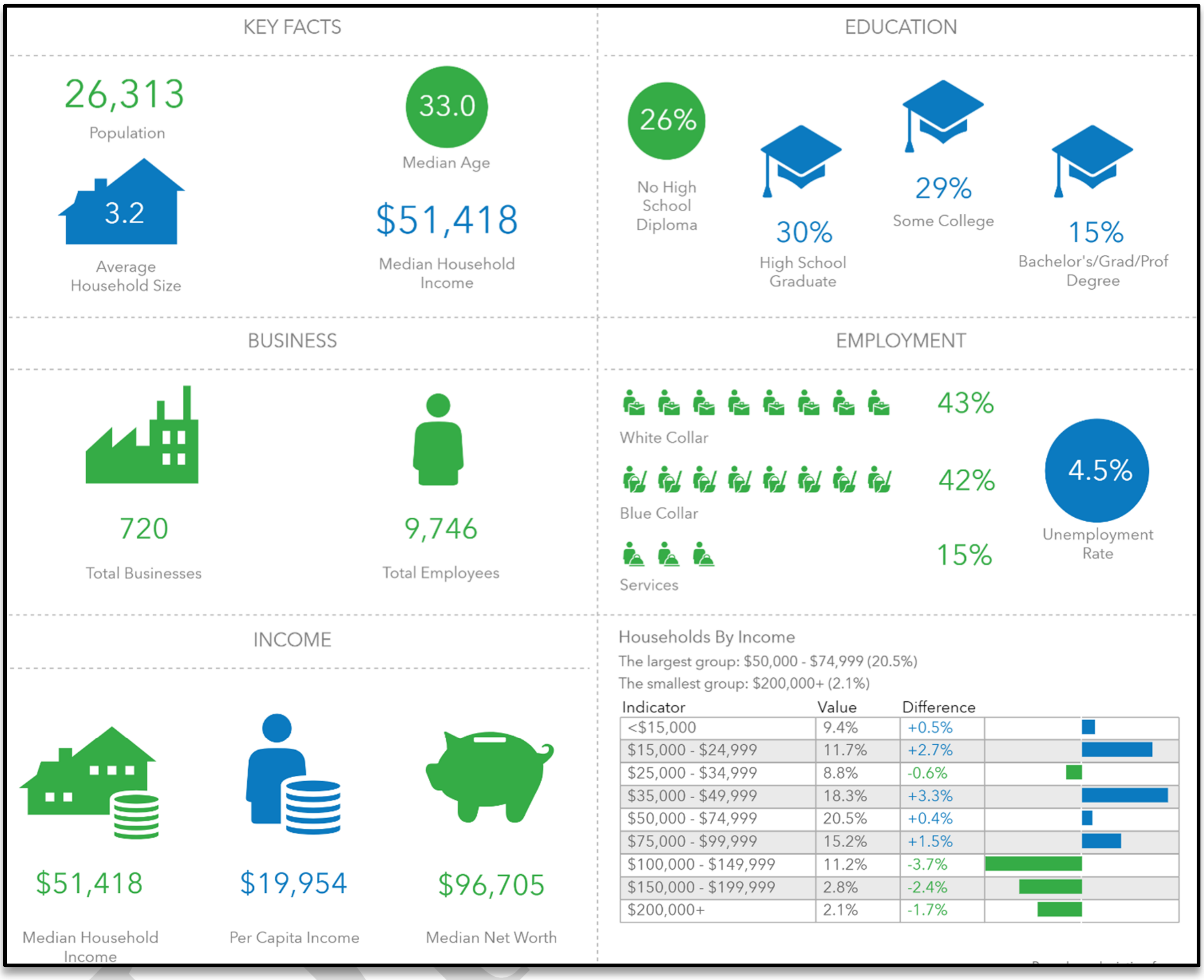
Service areas can vary in size with the types of components in the facility.

Map A – Service Area Maps



- Green Boundary – City of Woodburn
- Red Boundary – Secondary Service Area

Infographic



Indicator	Value	Difference
<$15,000	9.4%	+0.5%
$15,000 - $24,999	11.7%	+2.7%
$25,000 - $34,999	8.8%	-0.6%
$35,000 - $49,999	18.3%	+3.3%
$50,000 - $74,999	20.5%	+0.4%
$75,000 - $99,999	15.2%	+1.5%
$100,000 - $149,999	11.2%	-3.7%
$150,000 - $199,999	2.8%	-2.4%
$200,000+	2.1%	-1.7%

- Household by Income comparison uses Woodburn and compares it to Marion County.

Demographic Summary

	Woodburn	Secondary Service Area
Population:		
2010 Census	24,080[1]	43,423[2]
2019 Estimate	26,313	47,390
2024 Estimate	27,576	49,641
Households:		
2010 Census	7,545	13,483
2019 Estimate	8,122	14,498
2024 Estimate	8,497	15,148
Families:		
2010 Census	5,375	10,013
2019 Estimate	5,698	10,642
2024 Estimate	5,931	11,071
Average Household Size:		
2010 Census	3.17	3.18
2019 Estimate	3.20	3.23
2024 Estimate	3.21	3.24
Ethnicity (2019 Estimate):		
Hispanic	61.2%	51.2%
White	58.5%	64.3%
Black	0.7%	0.7%
American Indian	2.9%	2.4%
Asian	1.0%	1.0%
Pacific Islander	0.2%	0.2%
Other	32.7%	27.5%
Multiple	4.1%	3.8%
Median Age:		
2010 Census	31.8	32.5
2019 Estimate	33.0	33.9
2024 Estimate	33.9	34.7
Median Income:		
2019 Estimate	$51,418	$56,502
2024 Estimate	$58,134	$65,041

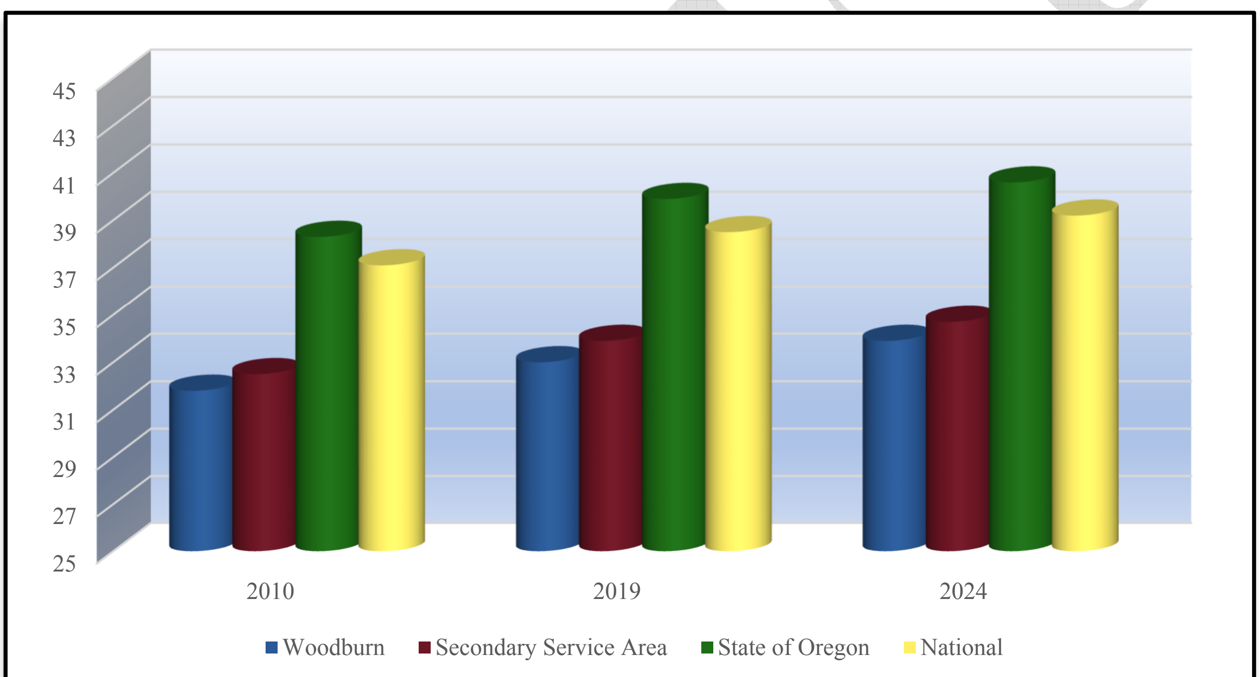
[1] From the 2000-2010 Census, Woodburn experienced an 18.5% increase in population.
[2] From the 2000-2010 Census, the Secondary Service Area experienced a 13.8% increase in population.

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

<u>Table A – Median Age:</u>

	2010 Census	2019 Projection	2024 Projection
Woodburn	31.8	33.0	33.9
Secondary Service Area	32.5	33.9	34.7
State of Oregon	38.3	39.9	40.6
Nationally	37.1	38.5	39.2

<u>Chart A – Median Age:</u>



The median age in Woodburn is lower than the Secondary Service Area, State of Oregon and the National number. A lower median age typically points to the presence of families with children. Indoor recreation amenities are becoming multi-generational as the population ages and is more interested in physical health.

Households with Children: The following chart provides the number of households and percentage of households in Woodburn and Secondary Service Area with children.

Table B – Households w/ Children

	Number of Households w/ Children	Percentage of Households w/ Children
Woodburn	3,042	40.3%
Secondary Service Area	5,539	41.1%
State of Oregon	456,775	30.1%

The information contained in Table-B helps further outline the presence of families with children. As a point of comparison in the 2010 Census, 33.4% of households nationally had children present.

Map B – Median Age by Block Group

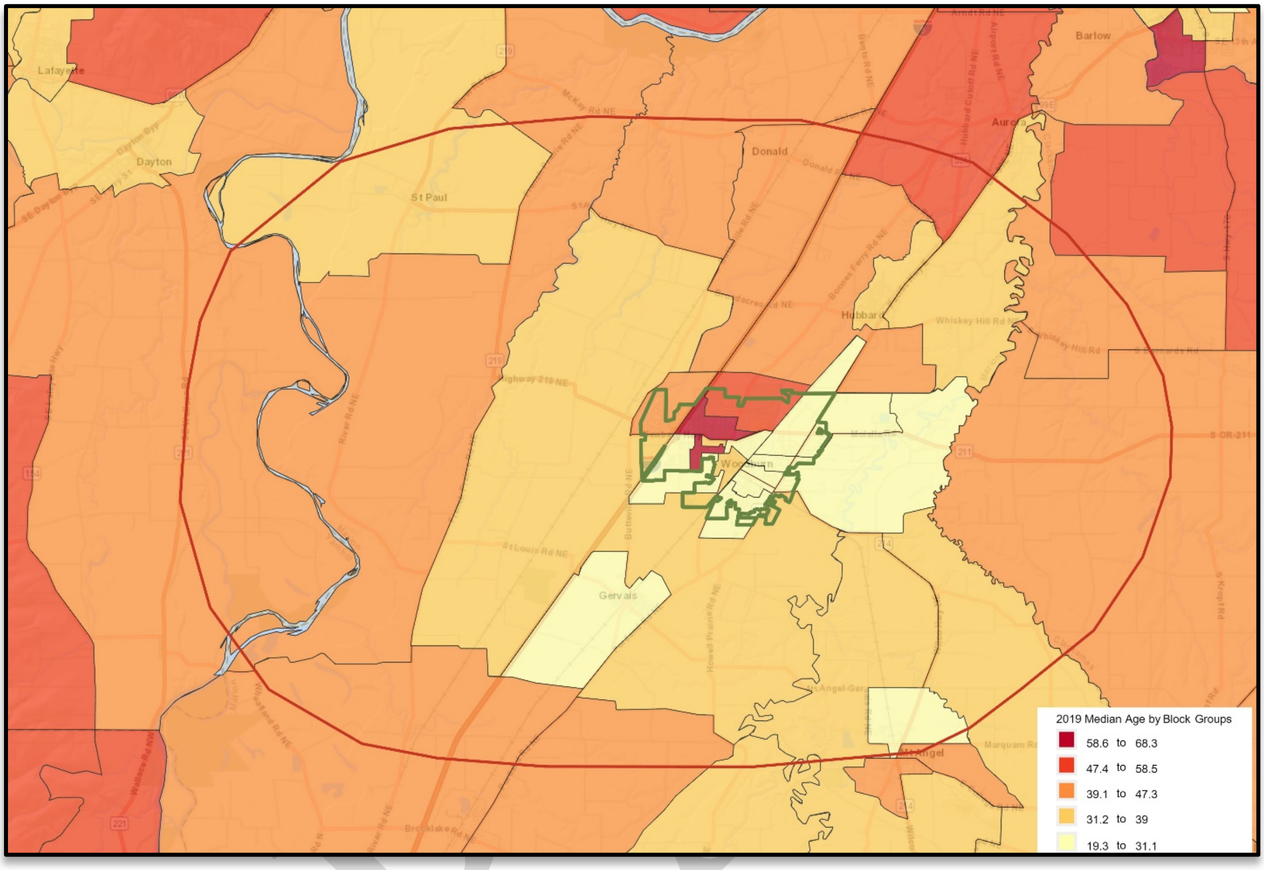
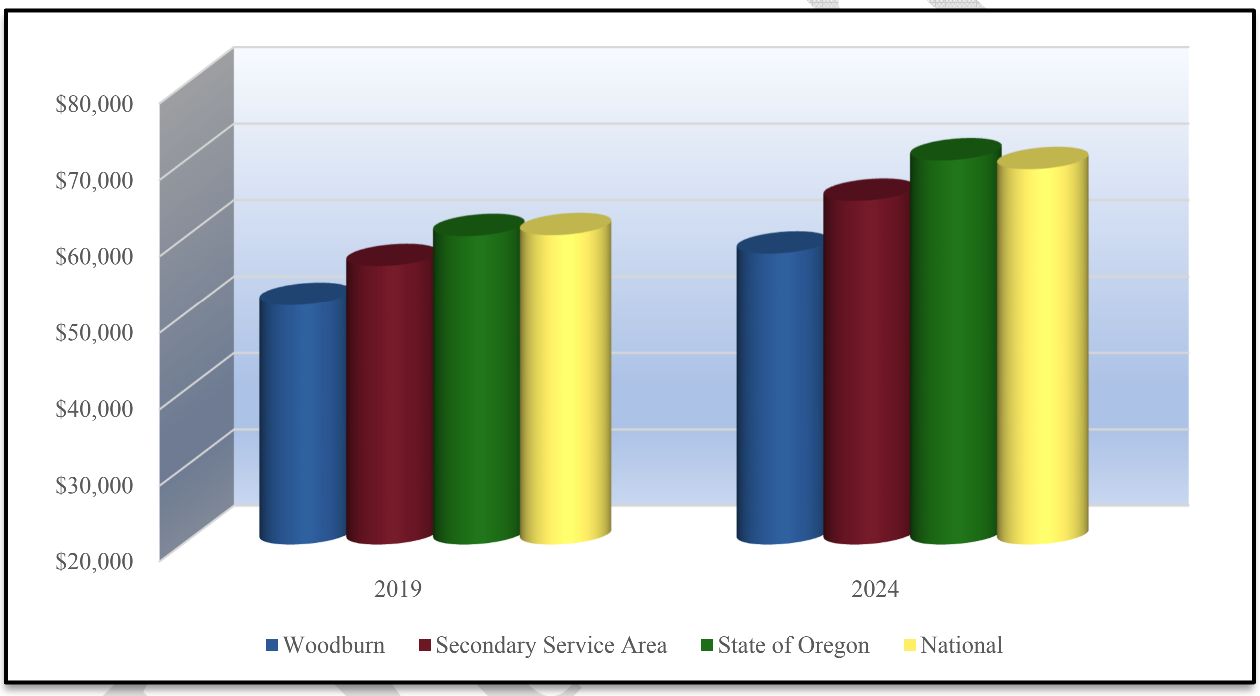


Table C – Median Household Income:

	2019 Projection	2024 Projection
Woodburn	$51,418	$58,134
Secondary Service Area	$56,502	$65,041
State of Oregon	$60,427	$70,329
Nationally	$60,548	$69,180

Chart B – Median Household Income:



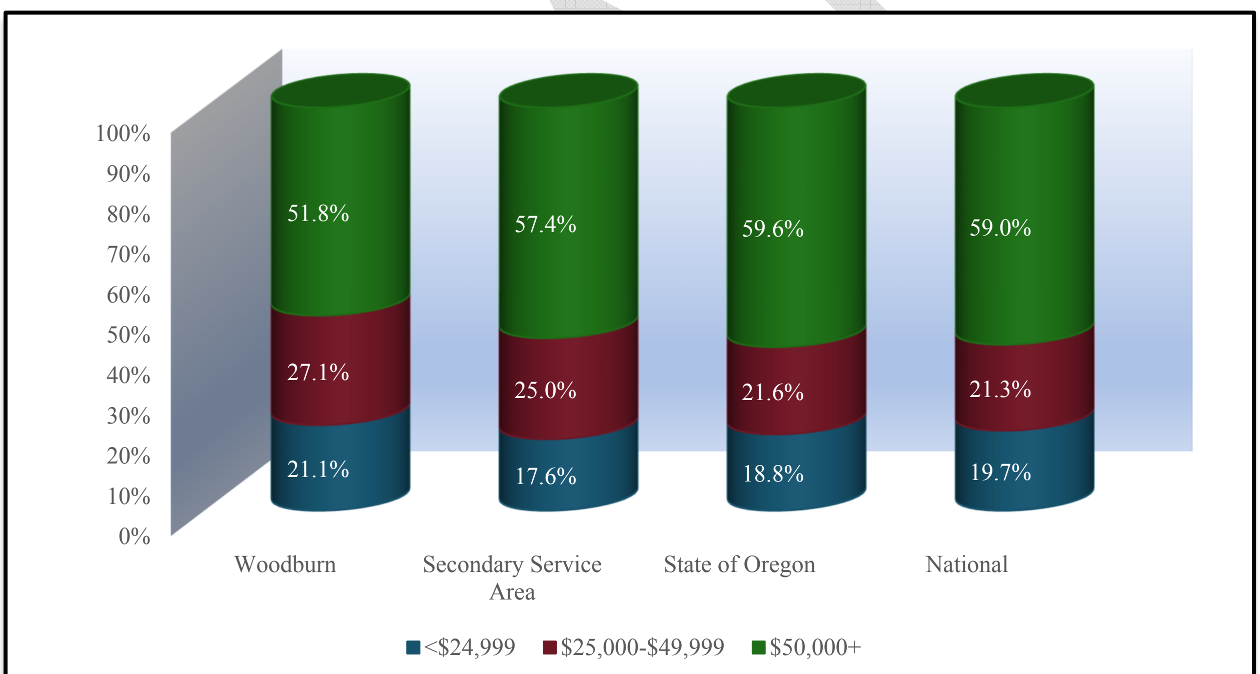
Based on 2019 projections for median household income the following narrative describes the service areas:

In Woodburn, the percentage of households with median income over $50,000 per year is 51.8% compared to 59.0% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 21.1% compared to a level of 19.7% nationally.

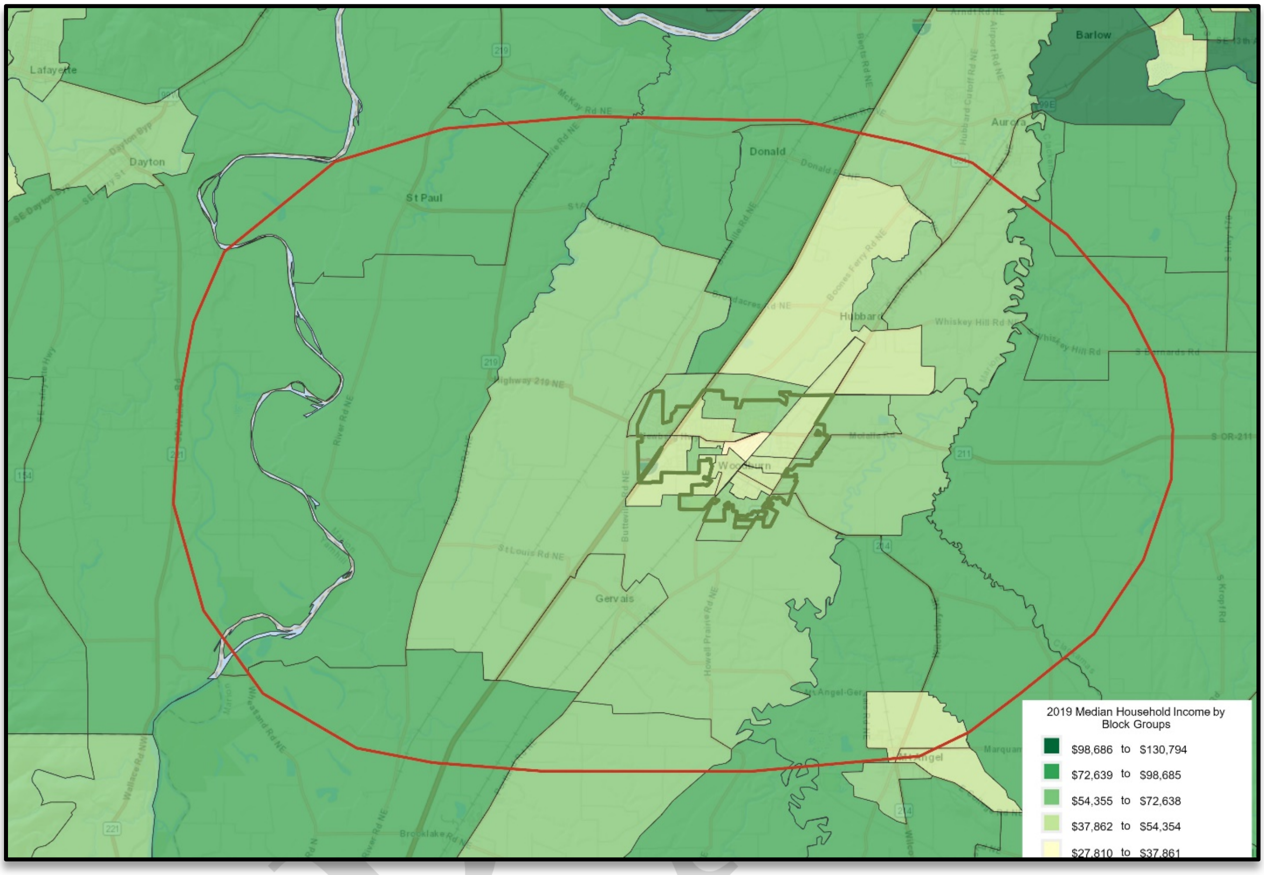
In the Secondary Service Area, the percentage of households with median income over $50,000 per year is 57.4% compared to 59.0% on a national level. Furthermore, the percentage of the households in the service area with median income less than $25,000 per year is 17.6% compared to a level of 19.7% nationally.

While there is no perfect indicator of use of an indoor recreation facility, the percentage of households with more than $50,000 median income is a key. Therefore, those numbers are significant and balanced with the overall cost of living.

Chart C – Median Household Income Distribution



Map C – Household Income by Block Group



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

Table D – Household Budget Expenditures[3]:

Woodburn	SPI	Average Amount Spent	Percent
Housing	76	$17,798.67	31.6%
Shelter	*76*	*$13,980.76*	*24.8%*
Utilities, Fuel, Public Service	*79*	*$3,817.91*	*6.8%*
Entertainment & Recreation	74	$2,413.53	4.3%

Secondary Service Area	SPI	Average Amount Spent	Percent
Housing	83	$19,371.61	31.0%
Shelter	*82*	*$15,132.54*	*24.2%*
Utilities, Fuel, Public Service	*87*	*$4,239.06*	*6.8%*
Entertainment & Recreation	84	$2,739.84	4.4%

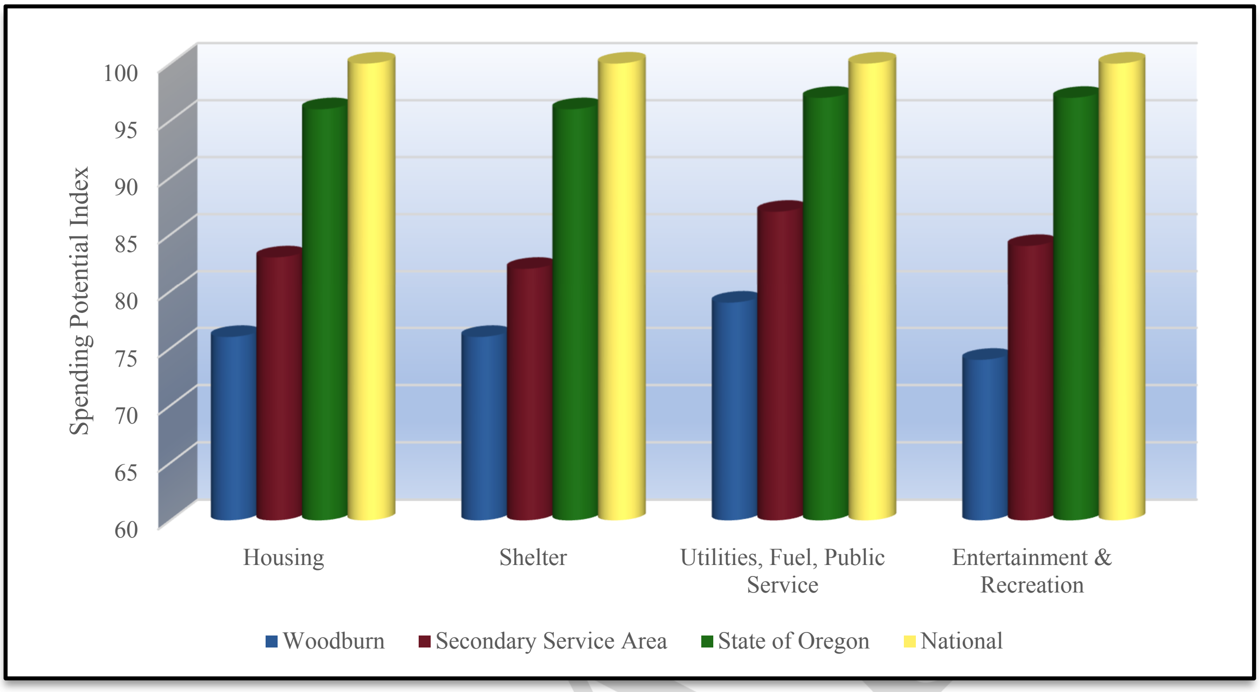
State of Oregon	SPI	Average Amount Spent	Percent
Housing	96	$22,525.87	31.3%
Shelter	*96*	*$17,826.96*	*24.8%*
Utilities, Fuel, Public Service	*97*	*$4,698.91*	*6.5%*
Entertainment & Recreation	97	$3,161.54	4.4%

SPI: Spending Potential Index as compared to the National number of 100.
Average Amount Spent: The average amount spent per household.
Percent: Percent of the total 100% of household expenditures.

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

[3] Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2019 and 2024.

Chart D – Household Budget Expenditures Spending Potential Index:



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

The total number of housing units in Woodburn is 8,282 and 91.1% are occupied, or 7,545 housing units. The total vacancy rate for the service area is 8.9%. Of the available units:

- For Rent 3.9%
- Rented, not Occupied 0.1%
- For Sale 2.5%
- Sold, not Occupied 0.2%
- For Seasonal Use 0.6%
- Other Vacant 1.6%

The total number of housing units in the Secondary Service Area is 14,610 and 92.3% are occupied, or 13,483 housing units. The total vacancy rate for the service area is 7.7%. Of the available units:

- For Rent 2.8%
- Rented, not Occupied 0.1%
- For Sale 2.0%
- Sold, not Occupied 0.4%
- For Seasonal Use 0.6%
- Other Vacant 1.8%

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

Table E – Recreation Expenditures Spending Potential Index[4]:

Woodburn	SPI	Average Spent
Fees for Participant Sports	73	$77.94
Fees for Recreational Lessons	66	$94.69
Social, Recreation, Club Membership	68	$161.73
Exercise Equipment/Game Tables	69	$44.74
Other Sports Equipment	77	$5.11

Secondary Service Area	SPI	Average Spent
Fees for Participant Sports	80	$86.32
Fees for Recreational Lessons	74	$105.45
Social, Recreation, Club Membership	75	$177.65
Exercise Equipment/Game Tables	77	$50.38
Other Sports Equipment	86	$5.72

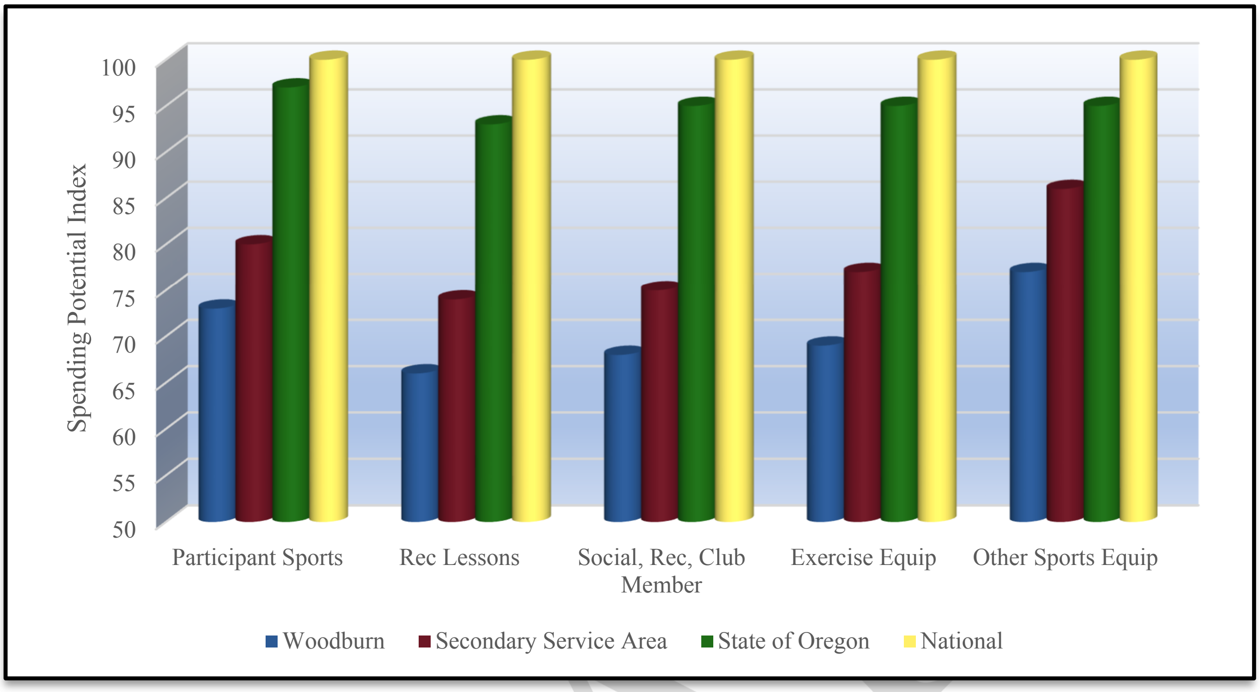
State of Oregon	SPI	Average Spent
Fees for Participant Sports	97	$103.56
Fees for Recreational Lessons	93	$132.77
Social, Recreation, Club Membership	95	$223.98
Exercise Equipment/Game Tables	95	$62.18
Other Sports Equipment	95	$6.31

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

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

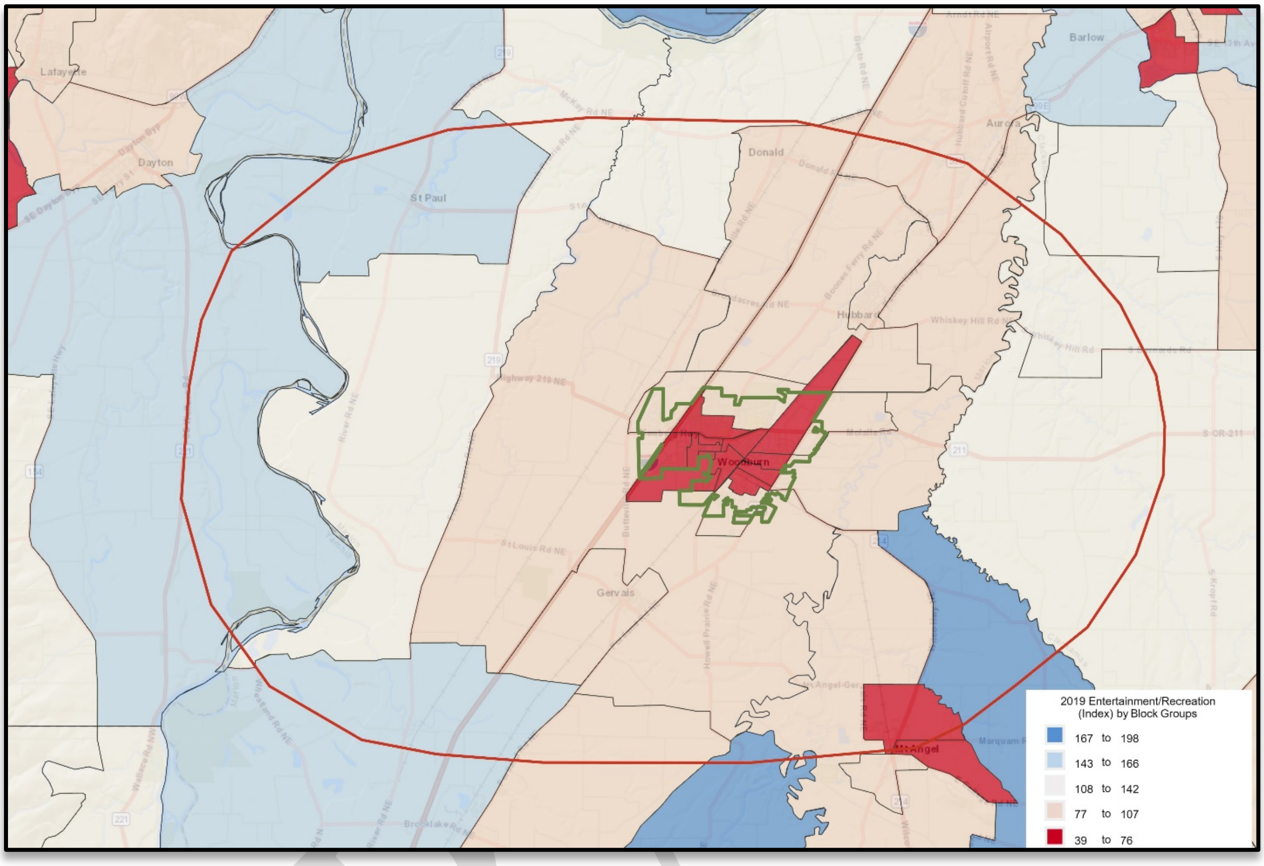
[4] Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Chart E – Recreation Spending Potential Index:



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

Map D – Recreation Spending Potential Index by Block Group



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

Table F – 2019 Woodburn Age Distribution
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
Under 5	2,321	8.8%	6.0%	+2.8%
5-17	5,375	20.4%	16.0%	+4.4%
18-24	2,501	9.5%	9.4%	+0.1%
25-44	6,702	25.4%	26.6%	-1.2%
45-54	2,474	9.4%	12.5%	-3.1%
55-64	2,362	9.0%	13.0%	-4.0%
65-74	2,303	8.8%	9.7%	-0.9%
75+	2,275	8.7%	6.8%	+1.9%

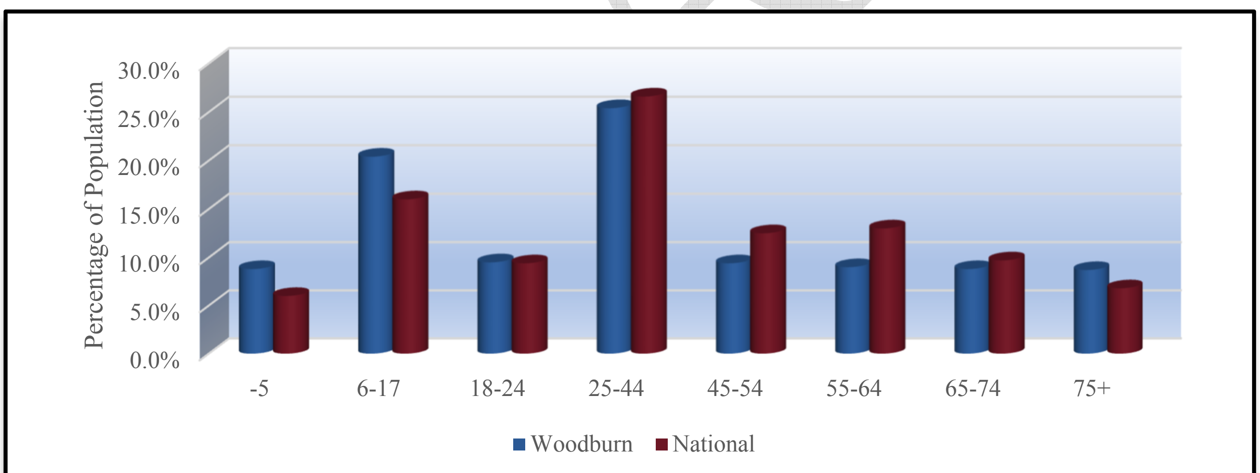
Population: 2019 census estimates in the different age groups in Woodburn.

% of Total: Percentage of the Woodburn population in the age group.

National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the Woodburn population and the national population.

Chart F – 2019 Woodburn Age Group Distribution



The demographic makeup of Woodburn, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the under 5, 5-17, 18-24 and 75+ age groups. A smaller population in the age groups 25-44, 45-54, 55-64 and 65-74. The greatest positive variance is in the 5-17 age group with +4.4%, while the greatest negative variance is in the 55-64 age group with -4.0%.

Table G – 2019 Secondary Service Area Age Distribution
(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
Under 5	3,878	8.2%	6.0%	+2.2%
5-17	9,457	20.0%	16.0%	+4.0%
18-24	4,427	9.3%	9.4%	-0.1%
25-44	12,386	26.2%	26.6%	-0.4%
45-54	4,988	10.5%	12.5%	-2.0%
55-64	4,836	10.2%	13.0%	-2.8%
65-74	4,056	8.6%	9.7%	-1.1%
75+	3,363	7.2%	6.8%	+0.4%

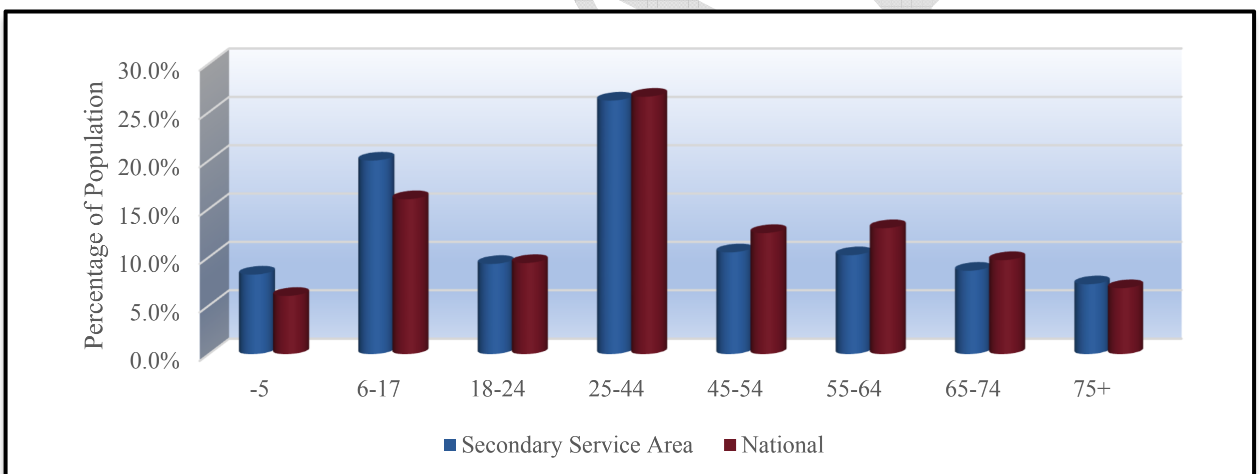
Population: 2019 census estimates in the different age groups in the Secondary Service Area.

% of Total: Percentage of the Secondary Service Area population in the age group.

National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the Secondary Service Area population and the national population.

Chart G – 2019 Secondary Service Area Age Group Distribution



The demographic makeup of Secondary Service Area, when compared to the characteristics of the national population, indicates that there are some differences with a larger population in the under 5, 5-17, and 75+ age groups. A smaller population in the 18-24, 25-44 and 45-54, 55-64, 65-74 age groups. The greatest positive variance is in the 6-17 age group with +4.0%, while the greatest negative variance is in the 55-64 age group with -2.8%.

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

Table H – 2019 Woodburn Population Estimates
(U.S. Census Information and ESRI)

Ages	2010 Census	2019 Projection	2024 Projection	Percent Change	Percent Change Nat'l
-5	2,343	2,321	2,408	+2.8%	+2.6%
5-17	5,099	5,375	5,805	+13.8%	+0.9%
18-24	2,326	2,501	2,509	+7.9%	+0.7%
25-44	6,301	6,702	6,849	+8.7%	+12.9%
45-54	2,265	2,474	2,645	+16.8%	-9.8%
55-64	2,041	2,362	2,384	+16.8%	+16.3%
65-74	1,681	2,303	2,428	+44.4%	+68.0%
75+	2,024	2,275	2,552	+26.1%	+46.4%

Chart H – Woodburn Population Growth

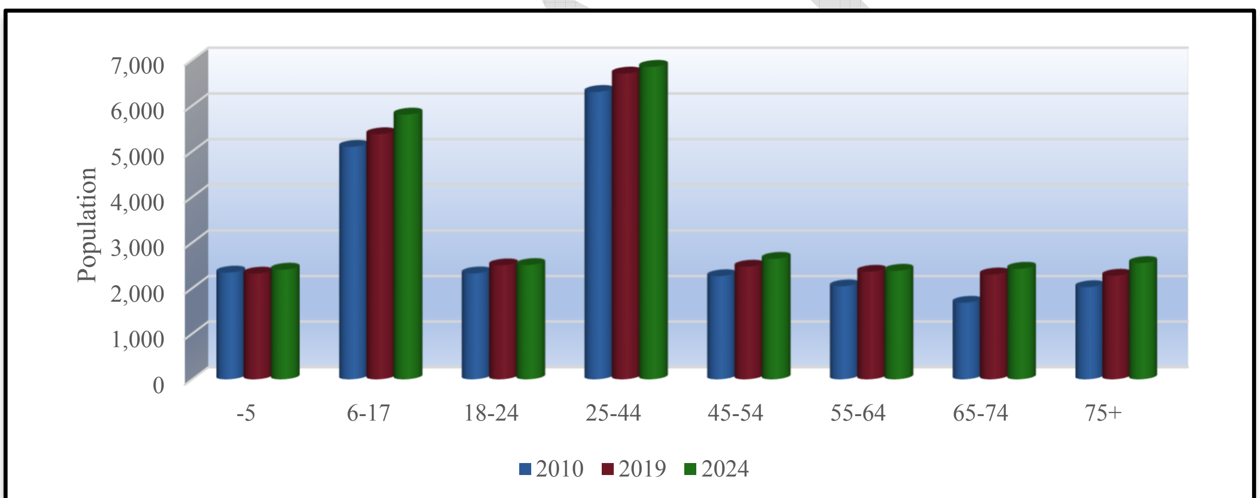


Table-H illustrates the growth or decline in age group numbers from the 2010 census until the year 2024. It is projected all age categories will see an increase in population. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Table I – 2019 Secondary Service Area Population Estimates
(U.S. Census Information and ESRI)

Ages	2010 Census	2019 Projection	2024 Projection	Percent Change	Percent Change Nat'l
-5	3,804	3,878	4,044	+6.3%	+2.6%
5-17	9,352	9,457	10,150	+8.5%	+0.9%
18-24	4,200	4,427	4,312	+2.7%	+0.7%
25-44	11,314	12,386	12,929	+14.3%	+12.9%
45-54	4,875	4,988	5,109	+4.8%	-9.8%
55-64	4,103	4,836	4,808	+17.2%	+16.3%
65-74	2,922	4,056	4,395	+50.4%	+68.0%
75+	2,854	3,363	3,894	+36.4%	+46.4%

Chart I – Secondary Service Area Population Growth

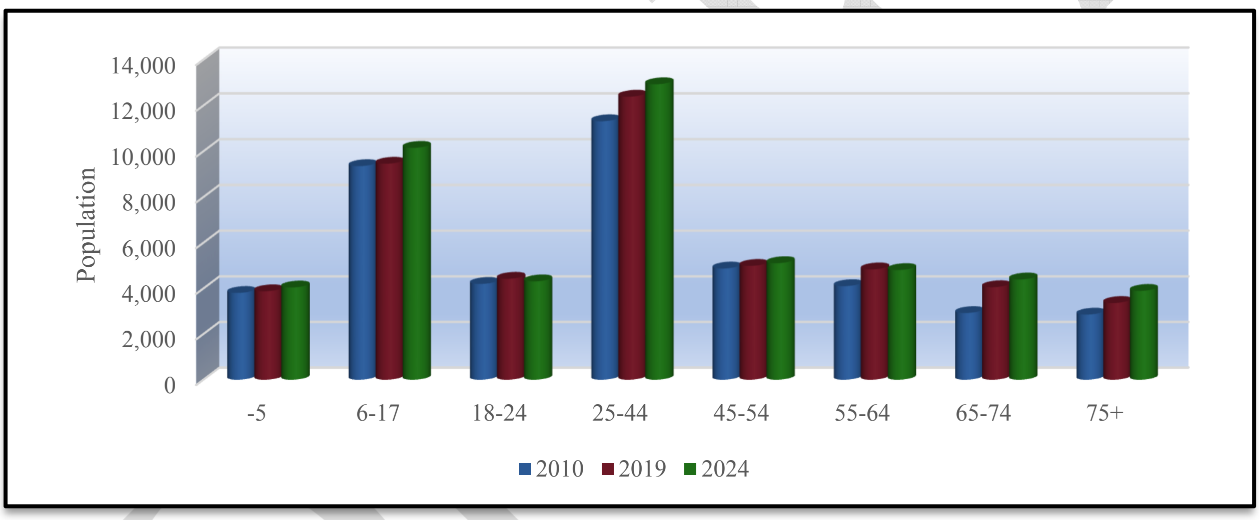


Table-I illustrates the growth or decline in age group numbers from the 2010 census until the year 2024. It is projected all age categories will see an increase in population, while all others will increase. The population of the United States as a whole is aging, and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.

Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for Woodburn and the Secondary Service Area for 2019 population projections. These numbers were developed from 2010 Census Data.

Table J – Woodburn Ethnic Population and Median Age 2019
(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of OR Population
Hispanic	16,096	24.5	61.2%	13.5%

Table K – Woodburn by Race and Median Age 2019
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of OR Population
White	15,406	43.6	58.5%	80.7%
Black	191	22.8	0.7%	2.1%
American Indian	757	28.1	2.9%	1.4%
Asian	253	40.3	1.0%	4.7%
Pacific Islander	40	30.0	0.2%	0.4%
Other	8,595	23.8	32.7%	6.1%
Multiple	1,078	25.1	4.1%	4.5%

2019 Woodburn Total Population: 26,313 Residents

Chart J – 2019 Woodburn Population by Non-White Race

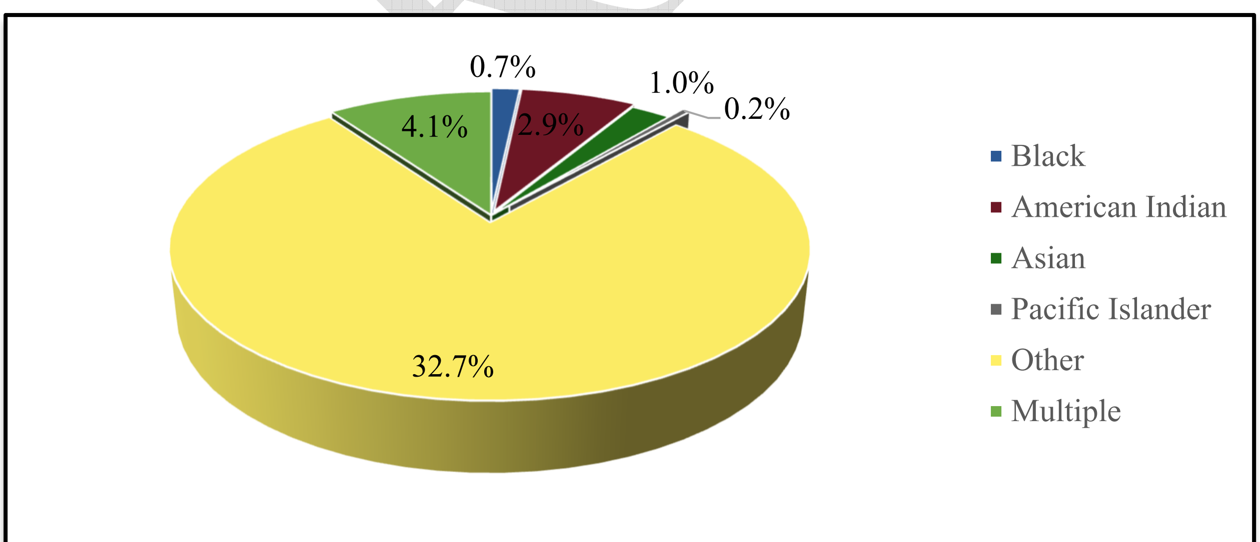


Table L – Secondary Service Area Ethnic Population and Median Age 2019
(Source – U.S. Census Bureau and ESRI)

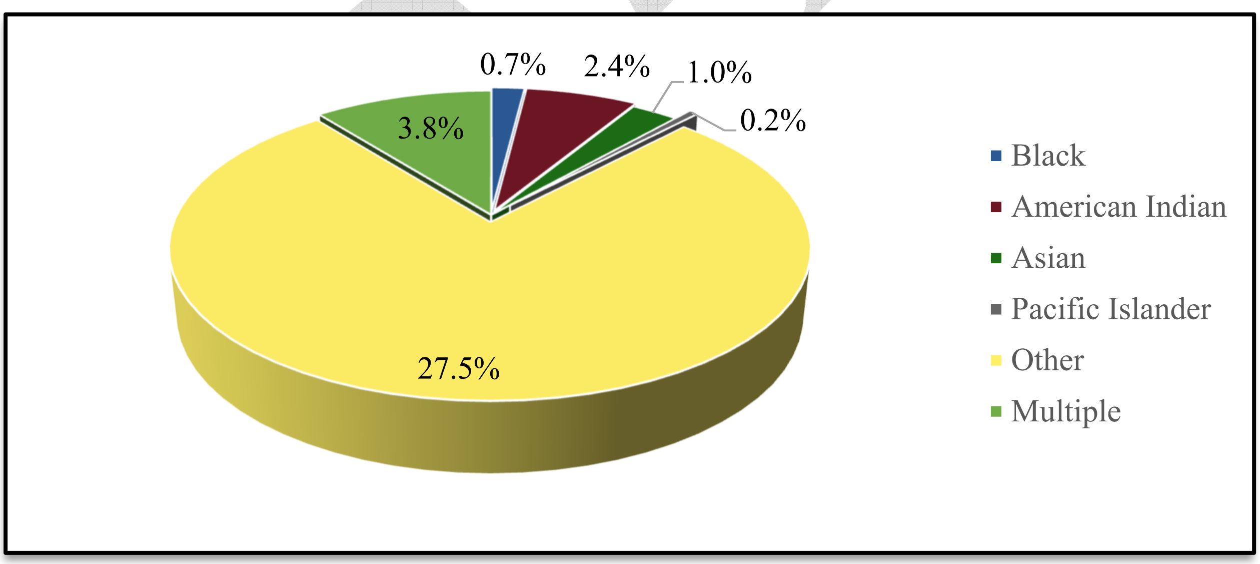
Ethnicity	Total Population	Median Age	% of Population	% of OR Population
Hispanic	24,252	24.8	51.2%	13.5%

Table M – Secondary Service Area by Race and Median Age 2019
(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of OR Population
White	30,491	41.6	64.3%	80.7%
Black	327	22.0	0.7%	2.1%
American Indian	1,146	28.8	2.4%	1.4%
Asian	468	36.1	1.0%	4.7%
Pacific Islander	83	32.2	0.2%	0.4%
Other	13,054	24.3	27.5%	6.1%
Multiple	1,819	24.2	3.8%	4.5%

2019 Secondary Service Area Total Population: 47,390 Residents

Chart K – 2019 Secondary Service Area Population by Non-White Race



Tapestry Segmentation

Tapestry segmentation represents the 4th generation of market segmentation systems that began 30 years ago. The 65-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. While the demographic landscape of the U.S. has changed significantly since the 2000 Census, the tapestry segmentation has remained stable as neighborhoods have evolved.

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

The following pages and tables outline the top 5 tapestry segments in each of the service areas and provide a brief description of each.

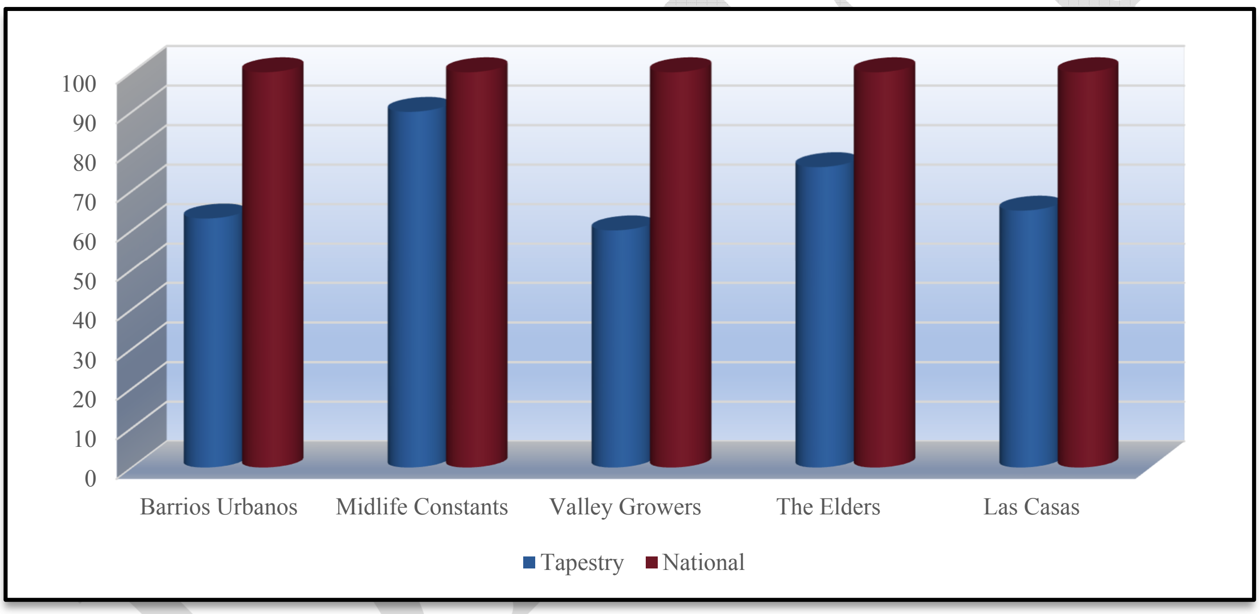
For comparison purposes the following are the top 10 Tapestry segments, along with percentage in the United States:

1. Green Acres (6A)	3.2%
2. Southern Satellites (10A)	3.1%
3. Savvy Suburbanites (1D)	3.0%
4. Soccer Moms (4A)	2.9%
5. Middleburg (4C)	2.9%
	15.1%
6. Salt of the Earth (6B)	2.9%
7. Up and Coming Families (7A)	2.5%
8. Midlife Constants (5E)	2.5%
9. Comfortable Empty Nesters (5A)	2.4%
10. Old and Newcomers (8F)	2.3%
	12.6%

Table N – Woodburn Tapestry Segment Comparison
(ESRI estimates)

	Woodburn		*Demographics*	
	Percent	Cumulative Percent	Median Age	Median HH Income
Barrios Urbanos (7D)	30.0%	30.0%	28.3	$36,000
Midlife Constants (5E)	16.0%	46.0%	45.9	$48,000
Valley Growers (7E)	15.4%	61.4%	22.6	$32,000
The Elders (9C)	9.9%	71.3%	71.8	$35,000
Las Casas (13B)	8.3%	79.6%	27.8	$37,000

Chart L – Woodburn Tapestry Segment Entertainment Spending:



Barrios Urbanos (7D) – Family is central within these diverse communities. Many are foreign born, culturally diverse and single-parent households. Balance budgets carefully with little to no savings.

Midlife Constants (5E) – Seniors at or approaching retirement. Although they are generous, they are attentive to price. Prefer outdoor activities and contributing to the arts/service organizations.

Valley Growers (7E) – A small but distinctive market exclusive to the West Coast. Young, Hispanic families with children and multiple generations in the house. All about spending time with family.

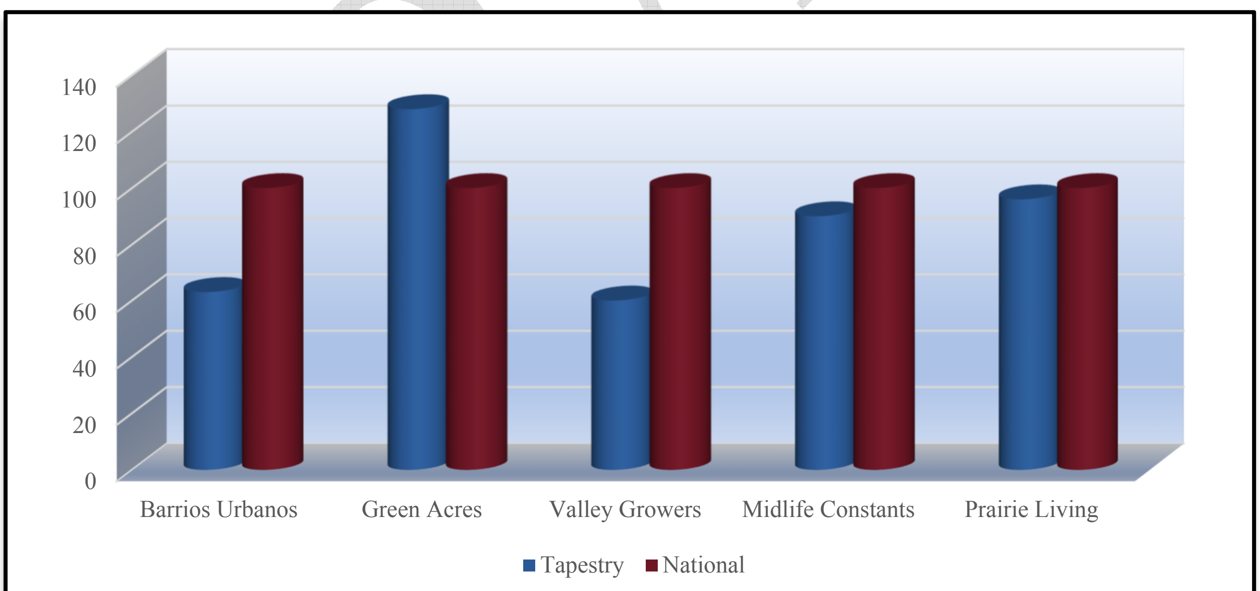
The Elders (9C) – Primarily in warmer climates, this is a senior population that is independent and involved. They have definite opinions and enjoy being social. They are partial to clubs and organizations that combine fitness and other activities. They are generous with their time and support.

Las Casas (13B) – A family-oriented market with multigenerational households. Savings and discretionary income are minimal due to large family sizes. Focus on personal style and trends. Open to new products and do not rely on technology. They lift weights, play soccer and baseball or go to movies.

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

	Secondary Service Area		*Demographics*	
	Percent	Cumulative Percent	Median Age	Median HH Income
Barrios Urbanos (7D)	23.2%	23.2%	28.3	$36,000
Green Acres (6A)	10.1%	33.3%	43.0	$72,000
Valley Growers (7E)	9.8%	43.1%	26.6	$32,000
Midlife Constants (5E)	9.2%	52.3%	45.9	$48,000
Prairie Living (6D)	8.3%	60.6%	43.4	$51,000

Chart M – Secondary Service Area Tapestry Segment Entertainment Spending:



Barrios Urbanos (7D) – Family is central within these diverse communities. Many are foreign born, culturally diverse and single-parent households. Balance budgets carefully with little to no savings.

Green Acres (6A) – Lifestyle that features self-reliance. Enjoy maintaining home/yard, being outside and playing sports. Most households no longer have children. Conservative and cautious.

Valley Growers (7E) – A small but distinctive market exclusive to the West Coast. Young, Hispanic families with children and multiple generations in the house. All about spending time with family.

Midlife Constants (5E) – Seniors at or approaching retirement. Although they are generous, they are attentive to price. Prefer outdoor activities and contributing to the arts/service organizations.

Prairie Living (6D) – The most rural market, predominantly self-employed farmers. Faith is important to these married-couple families. Choose outdoor activities when they find time to relax.

Demographic Summary

The following summarizes the demographic characteristics of the service areas.

- The City of Woodburn has a reasonably small population base to support a significant indoor aquatic and recreation facility, but the Secondary Service Area provides for a much larger population to draw from.

- The population is younger in both service areas and there are a considerable number of households with children.

- The median household income levels are lower than the state and national levels in both service areas.

- The cost of living is lower than other areas of Oregon and national numbers and the expenditures for recreation purposes are also lower.

- Both service areas have a higher population in the youth age groups than the national numbers and there is expected to be strong growth in virtually every age group over the next five years. However, the highest rate will be in the senior age groups.

- There is a large Hispanic population in the area.

- The tapestry segments indicate a unique population that is heavily influenced by the Hispanic community that is present.

Section II –Recreation Participation, Trends & Providers

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sports activities.

Participation Numbers: On an annual basis, the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay rate of participation onto Woodburn and the Secondary Service Area to determine market potential. The information contained in this section of the report, utilizes the NSGA's most recent survey. For that data was collected in 2018 and the report was issued in June of 2019.

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

Community Recreation Related Activities Participation: These activities are could take place at an indoor community recreation center space.

Table A –Participation Rates for Indoor Activities in Woodburn

	Age	Income	Region	Nation	Average
Aerobic Exercise	14.7%	15.9%	17.1%	15.5%	15.8%
Basketball	8.9%	9.3%	8.3%	8.4%	8.7%
Exercise Walking	33.8%	38.9%	35.7%	35.6%	36.0%
Exercise w/ Equipment	18.1%	20.7%	18.6%	19.0%	19.1%
Gymnastics	2.4%	2.0%	1.3%	2.0%	1.9%
Pickleball	6.8%	0.6%	0.9%	0.7%	2.3%
Pilates	1.8%	1.9%	2.0%	1.9%	1.9%
Running/Jogging	14.8%	17.2%	17.2%	14.8%	16.0%
Swimming	15.9%	17.5%	16.0%	15.8%	16.3%
Volleyball	3.6%	3.8%	3.8%	3.4%	3.7%
Weightlifting	11.3%	13.7%	11.6%	12.2%	12.2%
Workout @ Clubs	12.3%	13.3%	13.8%	12.6%	13.0%
Yoga	9.9%	10.9%	11.0%	10.2%	10.5%
Did Not Participate	23.1%	23.5%	19.7%	22.8%	22.3%

Age: Participation based on individuals ages 7 & Up in Woodburn.
Income: Participation based on the 2019 estimated median household income in Woodburn.
Region: Participation based on regional statistics (Pacific).
National: Participation based on national statistics.
Average: Average of the four columns.

Note: "Did Not Participate" refers to all 57 activities tracked by the NSGA.

Table B –Participation Rates for Indoor Activities in the Secondary Service Area

	Age	Income	Region	Nation	Average
Aerobic Exercise	14.9%	15.9%	17.1%	15.5%	15.9%
Basketball	8.9%	9.3%	8.3%	8.4%	8.7%
Exercise Walking	34.1%	38.9%	35.7%	35.6%	36.1%
Exercise w/ Equipment	18.3%	20.7%	18.6%	19.0%	19.1%
Gymnastics	2.3%	2.0%	1.3%	2.0%	1.9%
Pickleball	6.8%	0.6%	0.9%	0.7%	2.2%
Pilates	1.8%	1.9%	2.0%	1.9%	1.9%
Running/Jogging	15.0%	17.2%	17.2%	14.8%	16.0%
Swimming	16.0%	17.5%	16.0%	15.8%	16.3%
Volleyball	3.6%	3.8%	3.8%	3.4%	3.7%
Weightlifting	11.5%	13.7%	11.6%	12.2%	12.3%
Workout @ Clubs	12.4%	13.3%	13.8%	12.6%	13.0%
Yoga	10.0%	10.9%	11.0%	10.2%	10.5%
Did Not Participate	23.0%	23.5%	19.7%	22.8%	22.2%

Age: Participation based on individuals ages 7 & Up of the Secondary Service Area.
Income: Participation based on the 2019 estimated median household income in the Secondary Service Area.
Region: Participation based on regional statistics (Pacific).
National: Participation based on national statistics.
Average: Average of the four columns.

Anticipated Participation Number: Utilizing the average percentage from Table-A and Table-B above plus the 2010 census information and census estimates for 2019 and 2024 (over age 7) the following comparisons are available.

Table C –Participation Growth or Decline for Activities in Woodburn

	Average	2010 Population	2019 Population	2024 Population	Difference
Aerobic Exercise	15.8%	3,308	3,652	3,835	527
Basketball	8.7%	1,827	2,017	2,118	291
Exercise Walking	36.0%	7,533	8,317	8,733	1,201
Exercise w/ Equipment	19.1%	3,997	4,413	4,634	637
Gymnastics	1.9%	402	444	466	64
Pickleball	2.3%	472	521	547	75
Pilates	1.9%	398	440	462	63
Running/Jogging	16.0%	3,346	3,695	3,880	533
Swimming	16.3%	3,413	3,768	3,957	544
Volleyball	3.7%	766	846	888	122
Weightlifting	12.2%	2,554	2,820	2,961	407
Workout @ Clubs	13.0%	2,722	3,005	3,156	434
Yoga	10.5%	2,195	2,424	2,545	350
Did Not Participate	22.3%	4,660	5,146	5,403	743

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The "Did Not Participate" statistics refers to all 57 activities outlined in the NSGA 2018 Survey Instrument.

Table D –Participation Growth or Decline for Activities in the Secondary Service Area

	Average	2010 Population	2019 Population	2024 Population	Difference
Aerobic Exercise	15.9%	6,061	6,664	6,985	924
Basketball	8.7%	3,337	3,668	3,845	509
Exercise Walking	36.1%	13,785	15,154	15,886	2,101
Exercise w/ Equipment	19.1%	7,318	8,045	8,433	1,115
Gymnastics	1.9%	729	802	841	111
Pickleball	2.2%	857	942	987	131
Pilates	1.9%	731	803	842	111
Running/Jogging	16.0%	6,131	6,740	7,065	935
Swimming	16.3%	6,242	6,862	7,194	952
Volleyball	3.7%	1,399	1,538	1,612	213
Weightlifting	12.3%	4,684	5,149	5,398	714
Workout @ Clubs	13.0%	4,977	5,471	5,735	759
Yoga	10.5%	4,023	4,422	4,636	613
Did Not Participate	22.2%	8,500	9,344	9,796	1,296

Note: These figures do not necessarily translate into attendance figures for various activities or programs. The "Did Not Participate" statistics refers to all 57 activities outlined in the NSGA 2018 Survey Instrument.

Participation by Ethnicity and Race: The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2018 survey, the following comparisons are possible.

Table E – Comparison of National, African American and Hispanic Participation Rates

Woodburn

Indoor Activity	Woodburn	National Participation	African American Participation	Hispanic Participation
Aerobic Exercise	15.8%	15.5%	13.1%	12.7%
Basketball	8.7%	8.4%	12.1%	7.3%
Exercise Walking	36.0%	35.6%	31.2%	27.9%
Exercise w/ Equipment	19.1%	19.0%	15.4%	17.1%
Gymnastics	1.9%	2.0%	1.6%	2.2%
Pickleball	2.3%	0.7%	0.4%	0.3%
Pilates	1.9%	1.9%	2.4%	2.2%
Running/Jogging	16.0%	14.8%	12.3%	16.4%
Swimming	16.3%	15.8%	8.4%	12.8%
Volleyball	3.7%	3.4%	2.8%	3.9%
Weightlifting	12.2%	12.2%	10.3%	11.1%
Workout @ Clubs	13.0%	12.6%	9.8%	12.7%
Yoga	10.5%	10.2%	8.2%	11.5%
Did Not Participate	22.3%	22.8%	24.9%	23.2%

Primary Service Part: The unique participation percentage developed for Woodburn.
National Rate: The national percentage of individuals who participate in the given activity.
African American Rate: The percentage of African-Americans who participate in the given activity.
Hispanic Rate: The percentage of Hispanics who participate in the given activity.

There is Hispanic population of 61% in Woodburn. As such these numbers will play an important factor with regards to overall participation.

Table F – Comparison of National, African American and Hispanic Participation Rates

Secondary Service Area

Outdoor Activity	Secondary Service Area	National Participation	African American Participation	Hispanic Participation
Aerobic Exercise	15.9%	15.5%	13.1%	12.7%
Basketball	8.7%	8.4%	12.1%	7.3%
Exercise Walking	36.1%	35.6%	31.2%	27.9%
Exercise w/ Equipment	19.1%	19.0%	15.4%	17.1%
Gymnastics	1.9%	2.0%	1.6%	2.2%
Pickleball	2.2%	0.7%	0.4%	0.3%
Pilates	1.9%	1.9%	2.4%	2.2%
Running/Jogging	16.0%	14.8%	12.3%	16.4%
Swimming	16.3%	15.8%	8.4%	12.8%
Volleyball	3.7%	3.4%	2.8%	3.9%
Weightlifting	12.3%	12.2%	10.3%	11.1%
Workout @ Clubs	13.0%	12.6%	9.8%	12.7%
Yoga	10.5%	10.2%	8.2%	11.5%
Did Not Participate	22.2%	22.8%	24.9%	23.2%

Primary Service Part: The unique participation percentage developed for the Secondary Service Area.
National Rate: The national percentage of individuals who participate in the given activity.
African American Rate: The percentage of African-Americans who participate in the given activity.
Hispanic Rate: The percentage of Hispanics who participate in the given activity.

There is Hispanic population of 51% in the Secondary Service Area. As such these numbers will play an important factor with regards to overall participation.

Summary of Sports Participation: The following chart summarizes participation for a variety of activities utilizing information from the 2018 National Sporting Goods Association survey.

Table G – Sports Participation Summary

Sport	Nat'l Rank[5]	Nat'l Participation (in millions)
Exercise Walking	1	106.1
Exercising w/ Equipment	2	56.5
Swimming	3	47.1
Hiking	4	46.4
Aerobic Exercise	5	46.2
Running/Jogging	6	44.2
Camping Vacation/Overnight)	7	40.7
Workout @ Club	8	37.6
Bicycle Riding	9	37.1
Weightlifting	10	36.5
Yoga	12	30.4
Basketball	14	24.9
Billiards/Pool	15	20.4
Golf	17	17.7
Soccer	20	13.8
Tennis	22	12.2
Baseball	23	12.1
Table Tennis	25	10.3
Volleyball	26	10.1
Softball	27	9.7
Football (touch)	28	9.2
Football (tackle)	34	7.4
Football (flag)	35	6.3
Martial Arts MMA	37	6.0
Pilates	40	5.7
Skateboarding	42	5.4
Lacrosse	52	2.8
Pickleball	57	2.0

Nat'l Rank: Popularity of sport based on national survey.
Nat'l Participation: Population that participate in this sport on national survey.

[5] This rank is based upon the 55 activities reported on by NSGA in their 2018 survey instrument.

Participation by Age Group: Within the NSGA survey, participation is broken down by age groups. As such B*K can identify the top 3 age groups participating in the activities reflected in this report.

Chart H – Participation by Age Group:

Activity	Largest	Second Largest	Third Largest
Aerobics	35-44	25-34	45-54
Baseball	12-17	25-34	18-24
Basketball	7-11	45-54	35-44
Bicycle Riding	12-17	7-11	18-24
Billiards/Pool	35-44	25-34	45-54
Bowling	25-34	35-44	45-54
Cheerleading	12-17	7-11	18-24
Exercise Walking	55-64	45-54	65-74
Exercise w/ Equipment	25-34	45-54	55-64
Football (flag)	7-11	12-17	25-34
Football (tackle)	12-17	18-24	7-11
Football (touch)	12-17	25-34	7-11
Gymnastics	7-11	12-17	25-34
Lacrosse	12-17	7-11	18-24
Martial Arts MMA	7-11	25-34	18-24
Pickleball	12-17	65-74	25-34
Pilates	25-34	35-44	45-54
Running/Jogging	25-34	35-44	18-24
Skateboarding	12-17	18-24	7-11
Soccer	7-11	12-17	25-34
Softball	12-17	7-11	25-34
Swimming	45-54	55-64	12-17
Tables Tennis	25-34	18-24	35-44
Tennis	25-34	35-44	12-17
Volleyball	12-17	25-34	7-11
Weightlifting	25-34	35-44	45-54
Workout at Clubs	25-34	35-44	45-54
Wrestling	12-17	25-34	7-11
Yoga	25-34	35-44	18-24
Did Not Participate	45-54	55-64	65-74

Largest: Age group with the highest rate of participation.
Second Largest: Age group with the second highest rate of participation.
Third Largest: Age group with the third highest rate of participation.

Market Potential Index for Adult Participation: In addition to examining the participation numbers for various indoor activities through the NSGA 2018 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in various activities.

<u>Table I – Market Potential Index for Adult Participation in Activities in Woodburn</u>

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobic Exercise	1,130	6.1%	80
Basketball	1,417	7.6%	95
Exercise Walking	3,415	18.3%	75
Pilates	347	1.9%	75
Running/Jogging	1,598	8.6%	67
Swimming	2,144	11.5%	71
Tennis	499	2.7%	78
Volleyball	557	3.0%	86
Weightlifting	1,281	6.9%	66
Yoga	1,039	5.6%	69

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in Woodburn.
Percent of Population: Percent of the service area that participates in the activity.
MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the activities listed is lower than the national number of 100 in all instances. In many cases when a participation number is lower than the National number, Primary factors include a lack of facilities or an inability to pay for services and programs.

Table J – Market Potential Index for Adult Participation in Activities in the Secondary Service Area

Adults participated in:	Expected Number of Adults	Percent of Population	MPI
Aerobic	2,171	6.4%	84
Basketball	2,459	7.2%	90
Exercise Walking	7,029	20.6%	84
Pilates	687	2.0%	81
Running/Jogging	3,369	9.9%	77
Swimming	4,318	12.7%	78
Tennis	944	2.9%	83
Volleyball	1,186	3.5%	100
Weightlifting	2,600	7.6%	74
Yoga	2,046	6.0%	74

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Secondary Service Area.
Percent of Population: Percent of the service area that participates in the activity.
MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the activities listed is lower than the national number of 100 in all instances but one. In many cases when a participation number is lower than the National number, primary factors include a lack of facilities or an inability to pay for services and programs.

Sports Participation Trends: Below are listed several sports activities and the percentage of growth or decline that each has experienced nationally over the last ten years (2009-2018).

Table K – National Activity Trend (in millions)

Increasing in Popularity

	2009 Participation	2018 Participation	Percent Change
Kayaking	4.9	10.0	116.3%
Yoga	15.7	29.6	93.6%
Gymnastics	3.9	6.0	53.8%
Aerobic Exercising	33.2	44.9	39.2%
Running/Jogging	32.2	43.8	37.3%
Exercise Walking	93.4	104.5	13.6%
Tennis	10.8	12.3	13.0%
Cheerleading	3.1	3.5	12.9%
Lacrosse	2.6	2.9	7.7%
Hockey (ice)	3.1	3.3	6.5%
Ice/Figure Skating	8.2	8.8	6.1%
Weightlifting	34.5	36.5	5.8%
Baseball	11.5	12.1	5.2%
Pilates	5.5	5.7	3.6%
Basketball	24.4	24.6	2.0%
Soccer	13.6	13.8	1.5%

Decreasing in Popularity

	2009 Participation	2018 Participation	Percent Change
Football (touch)	9.3	9.2	-1.1%
Exercising w/ Equipment	57.2	55.5	-1.2%
Workout @ Club	38.3	37.4	-1.8%
Bicycle Riding	38.1	36.4	-2.6%
Volleyball	10.7	10.5	-5.6%
Football (flag)	6.7	6.3	-6.0%
Swimming	50.2	47.9	-6.2%
Martial Arts / MMA	6.4	6.0	-6.3%
Wrestling	3.0	3.2	-6.7%
Football (tackle)	8.9	7.5	-16.9%
Softball	11.8	9.8	-17.8%
Golf	22.3	17.7	-20.6%
Table Tennis/Ping Pong	13.3	10.2	-22.6%
Bowling	45.0	33.4	-25.8%

2018 Participation: The number of participants per year in the activity (in millions) in the United States.

2009 Participation: The number of participants per year in the activity (in millions) in the United States.

Percent Change: The percent change in the level of participation from 2009 to 2018.

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

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

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

- Visual & Performing Arts Attendance
- Arts Consumption Through Electronic Media
- Creating, Performing and Sharing Art
- Participation in Arts Learning Activities
- Reading and Film Attendance

Visual & Performing Arts Attendance

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

				Rate of Change	
Music	**2002**	**2008**	**2012**	**2002-2008**	**2008-2012**
Jazz	10.8%	7.8%	8.1%	-3.0%	+0.3%
Classical Music	11.6%	9.3%	8.8%	-2.3%	-0.5%
Opera	3.2%	2.1%	2.1%	-1.1%	+0.0%
Latin Music	Not Asked	4.9%	5.1%	NA	+0.2%
Outdoor Performing Arts Festival	Not Asked	20.8%	20.8%	NA	+0.0%

				Rate of Change	
Plays	**2002**	**2008**	**2012**	**2002-2008**	**2008-2012**
Musical Plays	17.1%	16.7%	15.2%	-0.4%	-1.5%
Non-Musical Plays	12.3%	9.4%	8.3%	-2.9%	-1.1%

				Rate of Change	
Dance	**2002**	**2008**	**2012**	**2002-2008**	**2008-2012**
Ballet	3.9%	2.9%	2.7%	-1.0%	-0.2%
Other Dance	6.3%	5.2%	5.6%	-1.1%	+0.4%

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

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

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Art Museums/Galleries	26.5%	22.7%	21.0%	-3.8%	-1.7%
Parks/Historical Buildings	33.4%	24.5%	22.4%	-8.9%	-2.1%
Craft/Visual Arts Festivals	31.6%	24.9%	23.9%	-6.7%	-1.0%

Table N – Percentage of Adults Attending Live Music Performance by Genre in the Past 12-Months

Genre	Percentage
Jazz	15.9%
Latin	9.1%
Classical	18.2%
Opera	4.8%
Hymns	14.2%
Country	20.2%
Rap	8.7%
Blues	13.1%
Folk	9.8%
Pop/Rock	43.6%

- Visual arts attendance has declined significantly since 2002.
- These 10-year declines were experienced by all demographic subgroups, with one exception; the nation's oldest Americans (75+) were more likely to attend visual arts activities than a decade ago.

Arts Consumption Through Electronic Media

Table O – Percentage of Adults Who Watched or Listened to an Arts Broadcast or Recording At least Once the Past 12-Months via TV/Radio or Internet

	TV or Radio	Internet	Both
Jazz	9.6%	5.2%	11.8%
Lain, Spanish, or Salsa	10.5%	5.4%	12.6%
Classical	11.7%	5.8%	13.6%
Opera	3.6%	1.5%	4.3%
Other Music[6]	40.1%	24.9%	46.9%
Theater Productions (musical or stage play)	6.2%	2.1%	7.1%
Ballet, Modern, or Contemporary	3.9%	1.3%	4.5%
Other Dance Programs and Shows	8.3%	2.2%	9.2%
Programs and Info. About Visual Arts	7.6%	4.1%	9.4%
Programs Info. About Book Writers	7.5%	5.3%	10.0%
Other Books, Stories, or Poetry Read Aloud	3.8%	4.6%	7.1%

Table P – Percentage of U.S. Adults Who Used Mobile or Handheld Devices to Explore the Arts: 2012

	Percentage
US Adult Population Used Mobile/Handheld Device for Any Reason	53.2%
Read, Listen, Download any Novel, Short Story, Poetry or Plays	16.0%
Watch, Listen, or Download Any Music	3.4%
Download or View Any Visual Arts	7.9%

- Americans were more likely to watch or listen to broadcast arts performances using traditional sources such as TV and radio than the Internet.
- Nearly half of all American adults watched or listened to a broadcast or recorded performance of rock, pop, country, folk, rap or hip-hop music in 2012.
- Over two-thirds of people watching dance performances via median in 2012 were women. Nearly three-quarters of the adult audience was 25-64.

[6] Rock, pop, country, folk, rap or hip-hop

Creating, Performing and Sharing Art

Table Q – Percentage of American Adults Engaging in the Performing Arts: 2012

	Percentage
Play a Musical Instrument	12.1%
Play a Musical Instrument (with others)	5.1%
Do Any Acting	1.4%
Do Any Social Dancing	31.6%
Do Any Formal Dancing	5.1%
Perform or Practice Singing	8.7%
Do Any Singing w/ Other People	6.8%

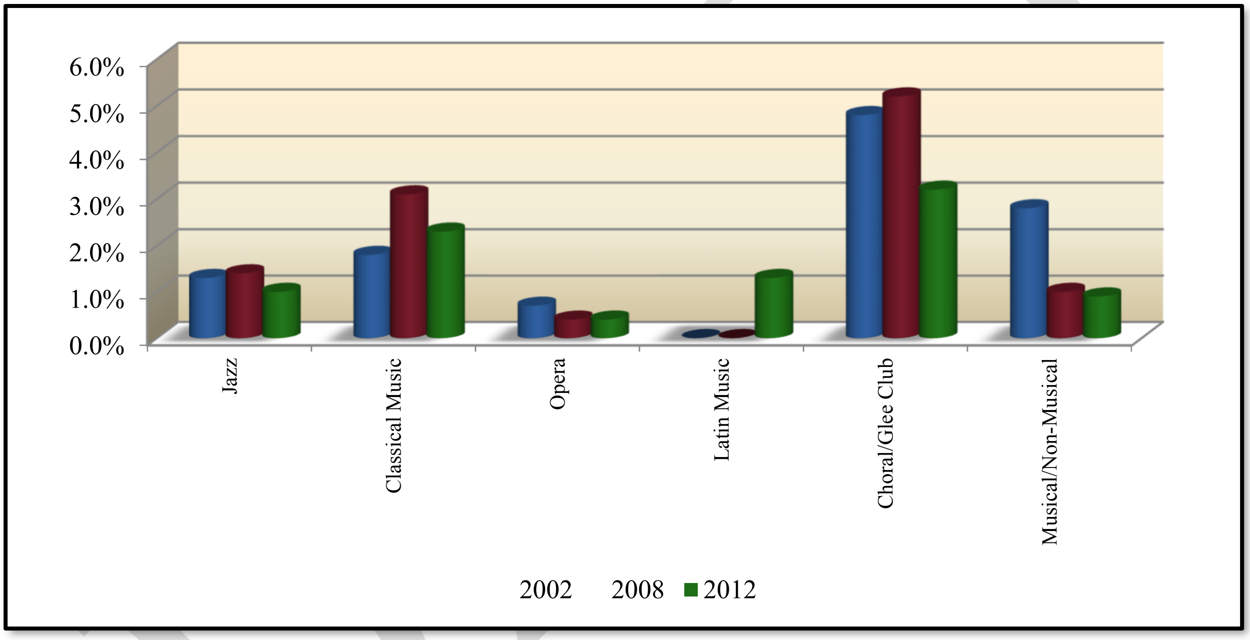
- Social dancing is the most common way Americans performed art in 2012, followed by playing a musical instrument.

- Women are more likely than men to dance. The rates of dance participation are highest for young adults (18-34) and increase with educational level and family income.

Table R – Percentage of Adults Who Practiced or Performed Music of Various Types

				Rate of Change	
Practiced or Performed	**2002**	**2008**	**2012**	**2002-2008**	**2008-2012**
Jazz	1.3%	1.4%	1.0%	+0.1%	-0.4%
Classical Music	1.8%	3.1%	2.3%	+1.3%	-0.8%
Opera	0.7%	0.4%	0.4%	-0.3%	+0.0%
Latin Music	N/A	N/A	1.3%	N/A	N/A
Choral or Glee Club	4.8%	5.2%	3.2%	+0.4%	-2.0%
Musical or Non-Musical	2.8%	1.0%	0.9%	-1.8%	-0.1%

Chart A – Percentage of U.S. Adult Population Attending Arts Performances:



- The percentage of American adults who performed or practiced jazz, classical music, or opera has not changed much since 2002.
- The percentage of people in a choral or glee club who performed in a musical or non-musical stage play has declined since 2002.

Table S – Percentage of Adults Creating or Performing Arts During the Last 12 Months

	Percentage
Music	5.0%
Dance	1.3%
Films/Videos	2.8%
Photos	12.4%
Visual Arts	5.7%
Scrapbooks	6.5%
Creative Writing	5.9%

Table T – Percentage of U.S. Adults Using Electronic Media to Create or Perform Art in the Past 12 Months by Art Form

	Percentage
Recorded, Edited, or Remixed Music	4.4%
Recorded, Edited or Remixed Dance	0.9%
Recorded, Edited or Remixed Films and Videos	2.2%
Edited Photos	13.0%

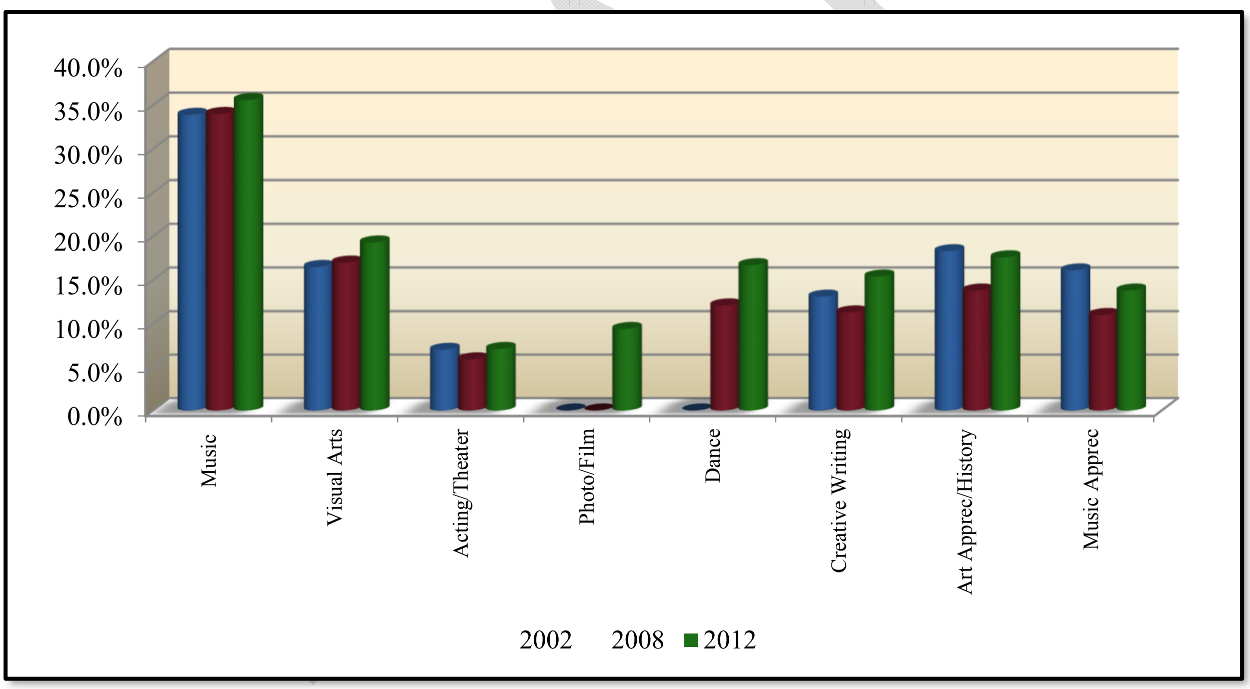
- 19% of American adults in 2012 used electronic media to share art that they themselves had created, edited or remixed.
- Men are more likely than women to use electronic media to create, perform, or share art. This pattern stands in contrast to most forms of arts participation, in which women typically lead men.
- Large proportions of adults who create music or visual art do so through electronic media.
- 12% of Americans take photographs for artistic purposes, making photography the most common form of arts creation.

Participation in Arts Learning Activities

Table U – Percentage of U.S. Adults Who Took Arts Lessons and Classes During their Lifetime by Form of Art Studied

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Music	33.9%	34.0%	35.6%	+0.1%	+1.6%
Visual Arts	16.5%	17.0%	19.3%	+0.5%	+2.3%
Acting or Theater	7.0%	5.9%	7.1%	-1.1%	+1.2%
Photography or Film	N/A	N/A	9.4%	N/A	N/A
Dance	N/A	12.1%	16.7%	N/A	+4.6%
Creative Writing	13.1%	11.3%	15.4%	-1.8%	+4.1%
Art Apprec. or History	18.3%	13.8%	17.6%	-4.5%	+3.8%
Music Appreciation	16.1%	11.0%	13.8%	-5.1%	+2.8%

Chart B – Percentage of U.S. Adult Population Attending Arts Performances:

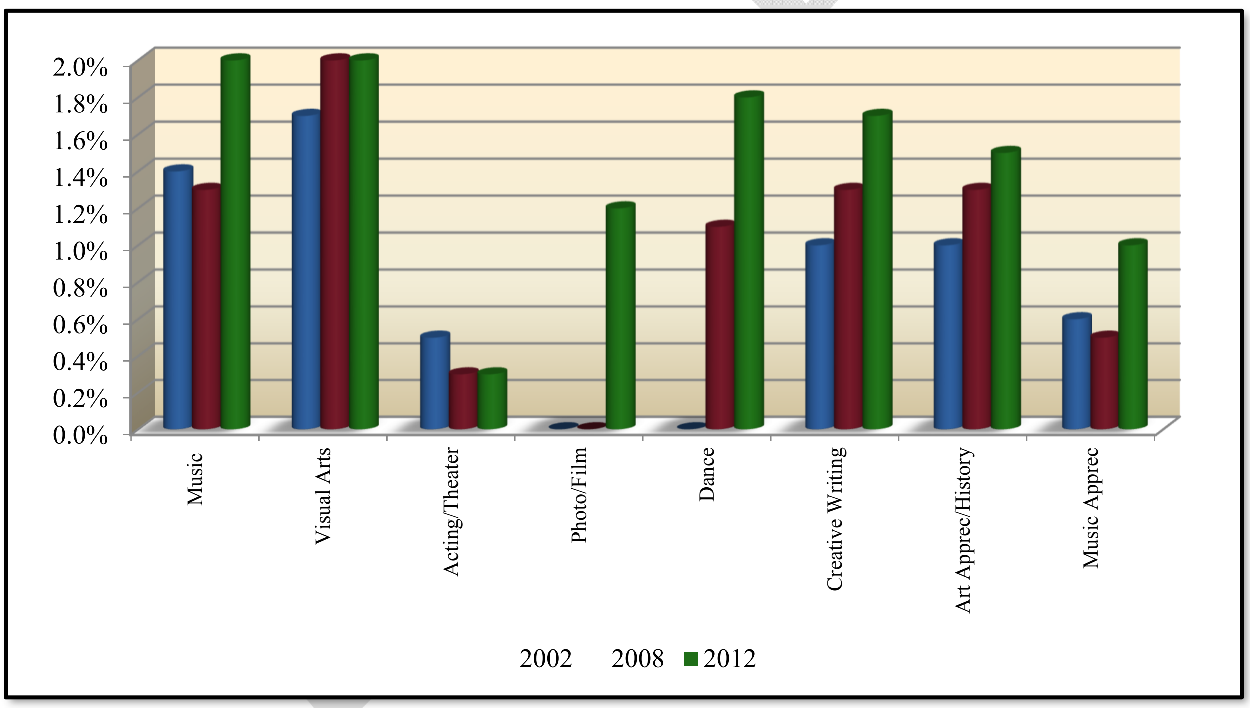


- Music is the art form most commonly studied, whether through voice-training or learning to play an instrument.

Table V – Percentage of U.S. Adults Who Took Arts Lessons and Classes During the Past 12-Monts

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Music	1.4%	1.3%	2.0%	-0.1%	+0.7%
Visual Arts	1.7%	2.0%	2.0%	+0.3%	+0.0%
Acting or Theater	0.5%	0.3%	0.3%	-0.2%	+0.0%
Photography or Film	N/A	N/A	1.2%	N/A	N/A
Dance	N/A	1.1%	1.8%	N/A	+0.7%
Creative Writing	1.0%	1.3%	1.7%	+0.3%	+0.4%
Art Apprec. or History	1.0%	1.3%	1.5%	+0.3%	+0.2%
Music Appreciation	0.6%	0.5%	1.0%	-0.1%	+0.5%

Chart C – Percentage of U.S. Adult Population Attending Arts Performances:



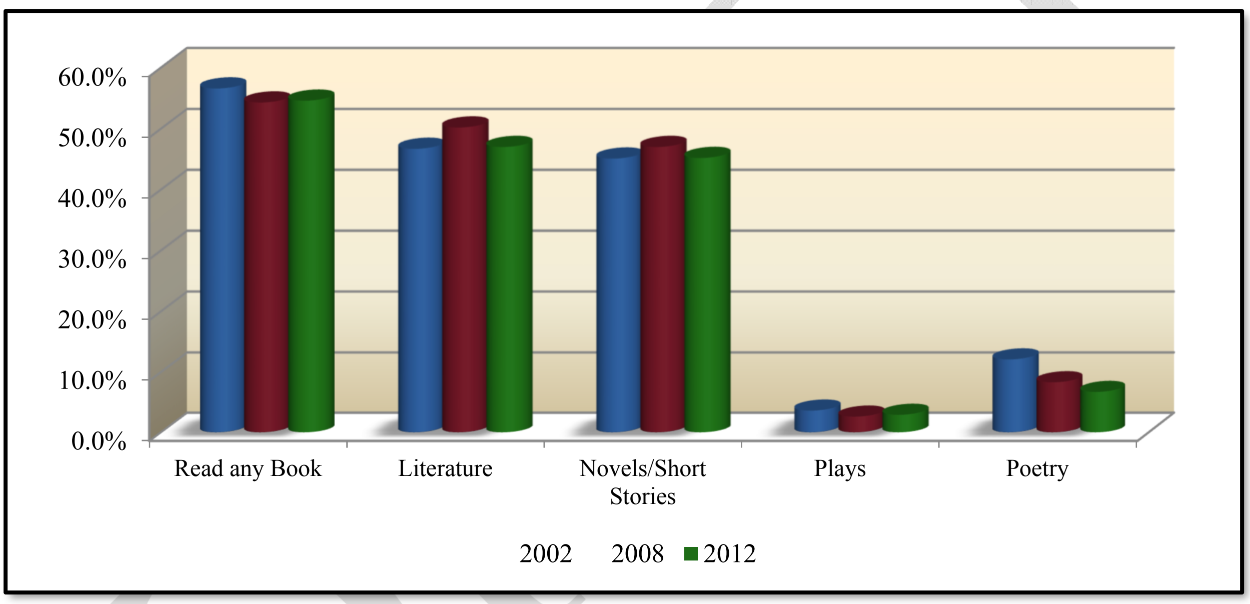
- Childhood experience in the arts is significantly associated with educational level obtained in adulthood. Over 70% of college graduates said they visited an art museum or gallery as a child, compared with 42% of adults who have only a high school diploma.

Reading and Film Attendance

Table W – Reading Activity

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
Read any Book, non-required	56.6%	54.3%	54.6%	-2.3%	+0.3%
Literature	46.7%	50.2%	47.0%	+3.5%	-3.2%
Novels and Short Stories	45.1%	47.0%	45.2%	+1.9%	-1.8%
Plays	3.6%	2.6%	2.9%	-1.0%	+0.3%
Poetry	12.1%	8.3%	6.7%	-3.3%	-1.6%

Chart D – Reading Activity

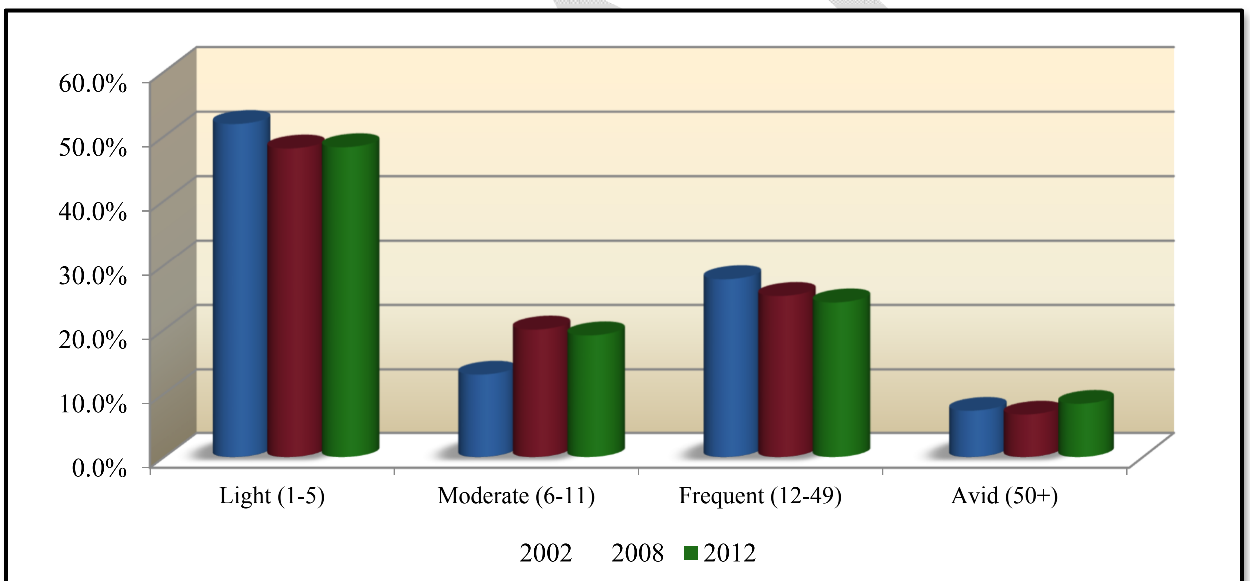


- Women are far more likely to read book literature than are men.
- Men are more likely to read nonfiction than fiction, while the opposite is true for women.
- Reading of books and literature has increased among older adults in the past decade.

Table X – Percentage of U.S. Adults who Read During the Past 12 Months by Frequency (number of books read):

				Rate of Change	
	2002	2008	2012	2002-2008	2008-2012
All Adults					
Light (1-5)	29.4%	26.1%	23.4%	-3.3%	-2.7%
Moderate (6-11)	7.4%	10.9%	10.4%	+3.5%	-0.5%
Frequent (12-49)	15.7%	13.7%	13.2%	-2.0%	-0.5%
Avid (50+)	4.1%	4.6%	4.6%	+0.5%	+0.0%
All Book Readers					
Light (1-5)	51.9%	48.1%	48.3%	-3.8%	+0.2%
Moderate (6-11)	13.0%	20.0%	19.1%	+7.0%	-0.9%
Frequent (12-49)	27.8%	25.2%	24.2%	-2.6%	-1.0%
Avid (50+)	7.3%	6.7%	8.4%	-0.6%	+1.7%

Chart E – All Book Readers Rate of Consumption



- Over half of Amerian adults read at least one book in 2012. This is unchanged from 2008, but in 2002 slightly more adults read books.
- About 4% of adults belonged to a book club or reading group in 2012.

Recreation Activity and Facility Trends: There continues to be very strong growth in the number of people participating in recreation and leisure activities. The Physical Activity Council in its 2017 study indicated that 42% of Americans (age 6 and older) participated at least once a week in a high calorie burning activity. However, the study also indicated that 27% of Americans were inactive. International Health and Racquet Sports Association (IHRSA) reported that membership in U.S. health clubs has increased by 2.6% from 2017, and memberships in health clubs reached an all-time high of 62.5 million in 2018. Statistics also indicate that approximately 1 out of every 5 people of the U.S. population (or 20.8%) belong to or utilize a health club. On the other side, most public recreation centers attract between 20% and 30% of a market area (more than once) during the course of a year. All of this indicates the relative strength of a market for a community recreation facility. However, despite these increases the American population as a whole continues to lead a rather sedentary life with an average of 25% of people across the country reporting that they engage in no physical activity (according to The Center for Disease Control).

One of the areas of greatest participant growth over the last 10 years is in fitness related activities such as exercise with equipment, aerobic exercise and group cycling. This is also the most volatile area of growth with specific interest areas soaring in popularity for a couple of years only to be replaced by a new activity for the coming years. Also showing particularly strong growth numbers are running/jogging while swimming participation remains consistently high despite recent drops in overall numbers. It is significant that many of the activities that can take place in an indoor recreation setting are ranked in the top fifteen in overall participation by the National Sporting Goods Association.

Due to the increasing recreational demands there has been a shortage in most communities of the following spaces:

- Gymnasiums
- Pools (especially leisure pools)
- Weight/cardiovascular equipment areas
- Indoor running/walking tracks
- Meeting/multipurpose (general program) space
- Senior's program space
- Pre-school and youth space
- Teen use areas
- Fieldhouses

As a result, many communities have attempted to include these amenities in public community recreation facilities. With the growth in youth sports and the high demand for school gyms, most communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most recreation agencies is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, warm water pools and classroom spaces are important to this age group. Marketing to the younger more active senior (usually age 55-70) is paramount, as this age group has the free time available to participate in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services.

Youth programming has always been a cornerstone for recreation services and will continue to be so with an increased emphasis on teen needs and providing a deterrent to juvenile crime. With a continuing increase in single parent households and two working parent families, the needs of school age children for before and after school child-care continues to grow as does the need for preschool programming.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. One of the other issues of competition comes from the non-profit sector (primarily YMCA's but also JCC's, Boys & Girls Clubs, and others), where the market is much closer to that of the public providers. While not as vociferous as the private providers, the non-profits have also often expressed concern over public community recreation centers. What has resulted from this is a strong growth in the number of partnerships that have occurred between the public and non-profit sector in an attempt to bring the best recreation amenities to a community.

Community Recreation Center Benchmarks: Based on market research conducted by Ballard*King & Associates at community recreation centers across the United States, the following represents the basic benchmarks.

- The majority of community recreation centers that are being built today are between 65,000 and 75,000 square feet. Most centers include three primary components A) A pool area usually with competitive and leisure amenities, B) Multipurpose gymnasium space, and C) Weight/cardiovascular equipment area. In addition, most centers also have group exercise rooms, drop-in childcare, and classroom and/or community spaces.

- For most centers to have an opportunity to cover all of their operating expenses with revenues, they must have a service population of at least 30,000 and an aggressive fee structure.

- Most centers that are between 65,000 and 75,000 square feet have an operating budget of between $2,000,000 and $2,500,000 annually. Nearly 65% of the operating costs are from personnel services, followed by approximately 25% for contractual services, 8% for commodities, and 2% for capital replacement.

- For centers that serve a more urban population and have a market driven fee structure, they should be able to recover 70% to 100% of operating expenses. For centers in more rural areas the recovery rate is generally 50% to 75%. Facilities that can consistently cover all of their operating expenses with revenues are rare. The first true benchmark year of operation does not occur until the third full year of operation.

- The majority of centers of the size noted (and in an urban environment) above average daily paid attendance of 800 to as much as 1,000 per day. These centers will also typically sell between 1,000 and 2,000 annual passes (depending on the fee structure and marketing program).

- It is common for most centers to have a three-tiered fee structure that offers daily, extended visit (usually punch cards) passes, and annual passes. In urban areas it is common to have resident and non-resident fees. Non-resident rates can cost 25% to 50% higher than the resident rate and are usually a topic of discussion amongst elected officials. Daily rates for residents' average between $3.00 and $6.00 for adults, $3.00 and $4.00 for youth and the same for seniors. Annual rates for residents' average between $200 and $300 for adults, and $100 and $200 for youth and seniors. Family annual passes tend to be heavily discounted and run between $350 and $800.

- Most centers are open an average of 105 hours a week, with weekday hours being 5:00 am to 10:00 pm, Saturdays 8:00 am to 8:00 pm and Sundays from noon to 8:00 pm. There is now a trend to open earlier on Sundays as well. Often hours are shorter during the summer months.

Note: These statistics vary by regions of the country.

Recreation Facilities Market Orientation: Based on the demographic makeup of the service areas and the trends in indoor recreation amenities, there are specific market areas that need to be addressed with such community facilities. These include:

General:

1. Drop-in recreation activities - Critical to the basic operation of any community recreation center is the availability of the facility for drop-in use by the general public. This requires components that support drop-in use and the careful scheduling of programs and activities to ensure that they do not dominate the center and exclude the drop-in user. The sale of annual passes and daily admissions, potential strong revenue sources for a center, requires a priority for drop-in use.

2. Instructional programming - The other major component of a community center's operation is a full slate of programs in a variety of disciplines. The center should provide instruction for a broad based group of users in a number of program areas. The primary emphasis should be on teaching basic skills with a secondary concern for specialized or advanced instruction.

3. Special events - There should be a market for special events including kid's birthday parties, community organization functions, sports tournaments and other special activities. The development of this market will aid significantly in the generation of additional revenues and these events can often be planned for before or after regular operating hours or during slow use times of the year. Care should be taken to ensure that special events do not adversely impact the everyday operations of the center.

4. Community rentals - Another aspect of a center's operation is providing space for rentals by civic groups or organizations as well as the general public. Gyms and multi-purpose rooms can be used as a large community gathering space and can host a variety of events from seminars, parties, receptions, arts and crafts sales and other events. It is important that a well-defined rental fee package is developed, and the fee schedule followed closely. Rentals should not be done at the expense of drop-in use or programming in the center.

5. Social welfare programs – An emerging area for many centers is the use of space for social service activities and programs. Special population activities, teen and senior assistance programs, childcare and other similar uses are now common in many facilities.

Specific market segments include:

1. Families - Within most markets an orientation towards family activities is essential. The ability to have family members of different ages participate in a variety of activities together or individually, is the challenge.

2. Pre-school children - The needs of pre-school age children need to be met with a variety of activities and programs designed for their use. From drop-in childcare to specialized pre-school classes, a number of such programs can be developed. Interactive programming involving parents and toddlers can also be beneficial. It is significant that this market usually is active during the mid-morning time frame, providing an important clientele to the facility during an otherwise slow period of the day. For parents with small children who wish to participate in their own activities, babysitting services are often necessary during the morning and early evening time slots.

3. School age youth - Recreation programming has tended to concentrate on this market segment and this age group should be emphasized at a center as well. This group requires a wide variety of programs and activities that are available after school, during the summer, or during weekend hours. Instructional programs and competitive sports programs are especially popular, as well as drop-in use of the facility.

4. Teens - A major focus of many community recreation center projects is on meeting the needs of teenagers in the community. There is a great debate among recreation providers throughout the country on how to best provide recreation programming for this age group. Some believe that dedicated teen space is required to meet their needs while others find that it is the activities and approach that is more important. Serving the needs of this age group will often require the use of many areas of the center at certain "teen" times of use.

5. Seniors - As the population of the United States and the service areas continue to age, continuing to meet the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Social programs as well as weight training and cardiovascular conditioning have proven to be popular with this age group. Again, the fact that this market segment will usually utilize a facility during the slower use times of early to mid-day also is appealing. Providing services for this age group should be more of a function of time than space.

6. Business/corporate - This market has a variety of needs from fitness/wellness and instruction, to recreation and social. The more amenities and services that can be offered at one location the more appeal there is to this market segment. The business community should be surveyed to determine their specific needs and expectations.

7. Special needs population - This is a secondary market, but with the A.D.A. requirements and the existence of a number of recreation components, the amenities will be present to develop programs for this population segment. Association with health care providers and/or other social service agencies will be necessary to fully reach this market.

8. Special interest groups - This is a market that needs to be explored to determine the use potential from a variety of groups. These could include school functions, social service organizations and adult and youth sports teams. While the needs of these groups can be great, their demands on a center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

Market Review

In addition to the demographic characteristics, recreation participation, and trends analysis, one of the other greatest impacts on the market for a possible expanded Woodburn Community Center is the presence of other similar providers in the area.

Within the greater Woodburn market area there are currently a number of indoor sports, recreation, aquatic and fitness facilities to serve the population base.

Public

There are several indoor public recreation facilities in the greater Woodburn area. The majority of these have a strong aquatic orientation.

Woodburn Aquatic Center – The City has the existing aquatic center that features a 25 yard by 25 meter pool, a small wading pool, a small weight/cardio area and a small group fitness room. There are limited "dry side" amenities and the aquatics side has a strong competitive orientation.

McMinnville – The City operates the McMinnville Community Center that has a large gym, indoor track, gymnastics space, community rooms, group exercise space and other amenities. There is also the McMinnville Aquatic Center which has an 8 lane x 25 yard pool, program pool, and a small weight room. The City is in the planning stages for a possible new aquatic/recreation center.

Chehalem Aquatic & Fitness Center – This facility is the newest public aquatic/fitness center in the area. The center features a large recreational pool with zero depth entry, interactive features, vortex, lazy river, lap lanes, deep water area and a slide. In a separate room is an 8 lane 25 yard pool that can be modified by a bulkhead to a 25 meter distance. On the other side of the bulkhead is a 5 lane by 20 yard warm up area. The center also has a fitness center attached. This facility is operated by the Chehalem Park & Recreation District.

Wilsonville Community Center – The community center features a number of classrooms and multipurpose space that supports a variety of recreation programs and services. It is significant that there is not an indoor pool associated with the center.

Canby Swim Center – This an older pool that is a 6 lane by 25 yard tank with a diving board. It is operated by the City of Canby.

Non-Profit

There are a number of non-profit facilities in the greater Woodburn market area. Two of the facilities are in Woodburn itself.

Woodburn Senior Center – This is a relatively small center that is operated out of a local church.

Boys & Girls Club – They operate out of a modular unit in Woodburn and are partially supported by the City.

Sherwood Family YMCA – This is a full-service YMCA that has an indoor aquatic area, gymnasium, fitness space and other amenities. It is owned by the City of Sherwood but operated by the YMCA.

Salem Kroc Corp Community Center – Operated by the Salvation Army, this is a large center that has an extensive indoor aquatic center, fitness area, community rooms, a theater and other support spaces.

The Sherwood Family YMCA and Salem Kroc Corp Community Center are major facilities that have an impact on the market to the north and south. The Woodburn Senior Center and Boys & Girls Club could be integrated into a new Woodburn Community Center.

Private

There are only a few private fitness providers in the immediate Woodburn area. There are two smaller facilities, Anytime Fitness and Burn Fitness a new center. Other facilities are available in other communities that are outside of the Secondary Service Area, but these will not have any impact on the Woodburn market.

This is a representative listing of alternative recreation facilities in the area and is not meant to be a total accounting of all service providers. There may be other facilities located in the area that have an impact on the Woodburn market as well.

Other Providers Conclusion: Despite the fact that there are a number of other aquatic, sports and fitness providers in place in the greater Woodburn area, the existing Woodburn Aquatic Center has an established presence in the market and is in need of significant upgrade and expansion.

Market Conclusion:

Below are listed some of the market opportunities and challenges that exist with this project.

Opportunities:

- The Secondary Service Area, at over 47,000 people, is large enough to support a sizeable public recreation center.
- Both market areas are expected to continue to grow at a strong rate.
- The population is younger in both service areas and there are a considerable number of households with children.
- The existing Woodburn Aquatic Center has an established market presence.
- There are a limited number of other providers in the Secondary Service Area.

Challenges:

- The population of the City of Woodburn is reasonably small at approximately 26,000, which will require strong use from the Secondary Service Area to have a center be financially viable.
- The strongest future growth will be in the older adult and senior age groups.
- The demographic characteristics of both service areas indicate households with lower income levels and limited disposable income for recreation purposes.
- The existing aquatic center will require significant upgrades and an expansion to effectively meet community needs in the future.
- Funding not only the development but the operation of an expanded community center will have to be clearly defined.