



COMPREHENSIVE PROGRAM PLAN

JANUARY 2019

TABLE OF CONTENTS

CHAPTER ONE – INTRODUCTION	1
1.1 CARMEL CLAY	1
1.2 DEPARTMENT OVERVIEW	1
1.3 SERVICING THE COMMUNITY	2
CHAPTER TWO – RECREATION.....	4
2.1 OVERVIEW.....	4
2.2 RECREATION STRATEGIC DIRECTION	4
2.3 RECREATION PROGRAMMING STRUCTURE AND DESIGN	5
CHAPTER THREE – PROGRAMMING	7
3.1 RECREATION PROGRAMMING LONG-TERM GOALS	7
3.2 RECREATION PROGRAM PARAMETERS	8
3.3 OPPORTUNITY STATEMENTS	9
CHAPTER FOUR – PROGRAM AND SERVICE STATISTICS	10
4.1 FRAMEWORK	10
4.2 EXAMPLE PROGRAM AND SERVICE STATISTICS TRACKED AND MEASURED	10
4.3 RECREATION PROGRAMMING EVALUATION	13
4.4 CREATING AND USING EVALUATIONS	15
CHAPTER FIVE – PROGRAM AND SERVICE DETERMINANTS	16
5.1 FRAMEWORK	16
CHAPTER SIX – RECREATION AND LEISURE TRENDS ANALYSIS.....	18
6.1 FRAMEWORK	18
6.2 INTEGRATING TRENDS INTO PROGRAMMING	19
CHAPTER SEVEN – COMMUNITY INVENTORY	20
7.1 SIMILAR PROVIDERS.....	20
7.2 SCOPE OF OPPORTUNITIES	25
CHAPTER EIGHT – SUPPORTING RECREATION PROGRAM IMPLEMENTATION	28
8.1 CONTEXT	28
8.2 VOLUNTEERISM.....	28
8.3 MARKETING	29
8.4 RISK MANAGEMENT.....	30
CHAPTER NINE – IMPLEMENTATION	31
9.1 IMPLICATIONS.....	31
9.2 REVIEW AND UPDATE	31
CHAPTER TEN – APPENDICES.....	32
10.1 APPENDIX A: COMMUNITY SURVEY	32
10.2 APPENDIX B: RECREATION TRENDS ANALYSIS.....	37
10.3 APPENDIX C: OPPORTUNITY STATEMENTS.....	73
10.4 APPENDIX D: UNDERSERVED POPULATIONS REPORT	82
10.5 APPENDIX E: SIMILAR PROVIDER INFORMATION TABLE.....	83

CHAPTER ONE – INTRODUCTION

1.1 CARMEL CLAY

The Carmel Clay Parks & Recreation (CCPR) Comprehensive Program Plan provides the long term framework for creating, planning, and implementing the innovative and inspiring programs demanded by the high expectations of our the Carmel and Clay Township community. The long term goals are guided and determined by the current CCPR Master Plan and basic underpinnings of the concepts of play, recreation, and leisure, the needs and other opportunities within our community, department philosophy and goals, and true experiences desired for our customers.

The purpose of this plan is to ensure the department is providing mission-driven and guest-focused recreation programming, which will enhance the quality of life for all who live, work and visit the City of Carmel and Clay Township.

1.2 DEPARTMENT OVERVIEW

The Department was originally established in August 1991 through an Interlocal Cooperation Agreement between the City of Carmel and Clay Township. A distinct, political subdivision under Indiana law, CCPR is governed by a Park Board, which serves as the policy-setting body and fiduciary guardian for the park system. The Park Board consists of nine members appointed by the Mayor (4), Township Trustee (4), and the Carmel Clay School Board (1). CCPR manages 535 acres of parkland, has an annual operating budget of more than \$12 million, and employs 645 full-time, part-time, and seasonal employees during peak operations. Staffing is also supplemented by approximately 2,300 donated volunteer hours.

While CCPR has been in existence for over two decades, the Department experienced tremendous growth in its programming and services between 2004 and 2008. Beginning with the 2006/2007 school year, CCPR was awarded a contract to manage and operate the Carmel Clay Schools before and after-school program. This program, called Extended School Enrichment (ESE), operates in 11 elementary schools and now has an enrollment of over 2,400 students.

The Monon Community Center (MCC) opened in May 2007 and has amenities and program offerings unsurpassed anywhere in the Hoosier state. This state-of-the-art facility includes indoor and outdoor aquatic centers, a 3-court gymnasium, fitness center, and 1/8 mile indoor track, child-care service for facility users, and a variety of program and multipurpose rooms.

1.2.1 MISSION

The mission of Carmel Clay Parks & Recreation is to strengthen our community and serve residents through the acquisition, development, and management of high-quality, innovative parks and facilities for recreation, preservation, and programming.

1.2.2 VISION

We envision an accessible system of vibrant community parks, diverse recreational facilities, sustainable park resources, and engaging programs that contribute to healthy individuals and families, an active and tightly-knit community, a thriving economy, and a high quality of life in the City of Carmel and Clay Township.

1.2.3 STATEMENT OF ACCESSIBILITY

Carmel Clay Parks & Recreation (CCPR) makes a good-faith effort to ensure all patrons, and the community at-large, are knowledgeable of the resources and opportunities available to them, which support full and active participation within CCPR's parks, facilities, and programs. CCPR believes every individual has the right to participate in activities and programs that supports their physical, mental, social, and emotional wellness, and therefore contribute to enhancing their overall quality of life.

Based on this belief, and CCPR's vision and mission, we are committed to the provision of services for individuals of all ages, skills, and ability levels. This is achieved by identifying and removing barriers in order to serve individual and community needs, as well as to provide quality programs and services accessible to all; such as our many recreational, leisure and education-based programs, volunteer opportunities, and interactive public events.

In addition to the statement of accessibility above, all of CCPR's programs are inclusive. If individuals would like to participate in any program or use a facility, CCPR will make modifications to meet participant needs. A "Request for Modification Form" is available online and requests must be made at least one month before participation.

1.3 SERVICING THE COMMUNITY

Quality parks, greenways, and opportunities for recreation and wellness contribute significantly to our community's quality of life. Carmel Clay Parks & Recreation is dedicated to providing enriching, enjoyable escapes through recreation, fitness, and nature.

RECREATION & FACILITIES

With amenities and program offerings unsurpassed anywhere in the state, the Monon Community Center is the community's one-stop source for recreation, fitness, and family fun. This award winning facility features The Waterpark, indoor aquatics, a fitness center, 3-court gymnasium, program and meeting rooms, and so much more.

2018 *BY THE NUMBERS...

629,018: Total membership and pass attendance

25,977: Registered participants in recreation programs

2,081: Types of recreation programs and classes offered

EXTENDED SCHOOL ENRICHMENT & CAMPS

Established in 2006 through a partnership with Carmel Clay Schools, ESE provides before and after-school care within the school district's 11 elementary schools. Our ESE program also offers a variety of traditional and specialty summer camps, providing opportunities for summertime fun, learning, and exploration.

2018 *BY THE NUMBERS...

6,838: Summer camp enrollment

2,548: Before & after school enrollment for 2017-18 school year

11: Before and after school locations, continuing to make it the largest "Lights on Afterschool" celebration in Indiana

PARKS & NATURAL RESOURCES

A nationally recognized park system of parks, nature preserves, and greenways supports activities such as picnicking, playing on playgrounds, splashing at spray parks, walking or biking on trails, playing sports, fishing, and enjoying the outdoors.

2018 *BY THE NUMBERS...

957 tree hazards mitigated throughout the park system

27 acres managed for invasive and nuisance species

2,734 hours of total volunteer hours, 53% of hours were park stewardship projects

543: Acres of parkland owned or managed by the Park Board

24.67: Miles of developed trails within the park system

13: Number of parks

4: Number of greenway trails, including the Monon Greenway, which is designated a “Hall of Fame Trail” by the Rails-to-Trails Conservancy



CHAPTER TWO – RECREATION

2.1 OVERVIEW

Carmel Clay Parks & Recreation (CCPR) is a Gold Medal-winning, CAPRA Accredited department that prides itself in offering the highest quality parks, programs, and services. Since its inception in 1991, the department has experienced tremendous growth, particularly in the program area. As the department continues to evolve it will be faced with new challenges. This section aims to explain CCPR's programming structure, determining factors in how programs are developed, and long-term goals which will be instrumental in its long-term success.

2.2 RECREATION STRATEGIC DIRECTION

The Parks & Recreation Master Plan identifies several goals, strategies, and actions for CCPR over the next 5 years which will continue to help guide the recreation opportunities made available to the residents of Carmel and Clay Township.

Based on public input and the current mission and vision of Carmel Clay Parks & Recreation, the following strategic directions specific to recreation programming were identified. These directions will help shape the long-term goals within this recreation programming plan.

- Incorporate a variety of parks and facilities to provide diverse opportunities for recreation, including active and passive activities, organized and self-directed experiences, and year-round (winter and summer) options.
- Provide inclusive, innovative, and quality recreation services that reflect community pride as well as the distinctiveness and excellence of Carmel Clay Parks & Recreation.
- Coordinate amongst Recreation & Facilities division, Extended School Enrichment & Camps division, and Parks & Natural Resources division to provide comprehensive recreation opportunities for the Carmel Clay community.

Out of this framework, overarching program objectives are identified that include:

1. Conduct on-going needs assessment to aid in future planning of program/services utilizing data, program evaluations, and Community Survey results.
2. Develop and provide participants with the opportunity to enjoy activities of interest to them within the defined program areas.
3. Develop enhanced natural resource education programming thru coordination between Recreation & Facilities division, Extended School Enrichment & Camps division, and Parks & Natural Resources division (main 2019-2024 programming objective).
4. Create the opportunity for participants to socialize and interact in a safe and comfortable setting at the Carmel Clay Schools and CCPR parks and/or facilities, ensure risk management and prevention are addressed, and ensure emergency procedures are in place.
5. Teach participants the fundamental skills, tactics, and strategies regarding the activity to enable the participant to play, appreciate, and enjoy it now and in later years.
6. Ensure program sustainability by achievement of required cost recovery goals.

2.3 RECREATION PROGRAMMING STRUCTURE AND DESIGN

The Department's Recreation Programming is broken into focused Program Areas and Categories to better support the department's vision of offering *“engaging programs that contribute to healthy individuals and families, an active and tightly-knit community, a thriving economy, and a high quality of life in the City of Carmel and Clay Township.”*

Recreation Programming is broken down into the following Program Areas and Categories:

- Aquatics (all ages)
- Adaptive (all ages)
- Creative Arts (all ages)
- Enrichment (all ages)
- Fitness/Wellness (15+)
- Homeschool
- Nature (all ages)
- Science & Technology (all ages)
- Senior
- Sports (all ages)
- Extended School Enrichment

These Program Areas are further broken down into the following Program Categories:

- Parent/Child (0-5 years)
- Preschool (3-5 years)
- Youth (6-12 years)
- Tween/Teen (11-17 years)
- Adult (18+)



2.3.1 PRIORITIZATION OF SERVICES

The provision of facilities, programs and services is fundamental to the vision and mission of Carmel Clay Parks & Recreation. Since the resources available to offer programs and services is limited, the delivery of these services is prioritized based on the following criteria:

- All Services: All programs and services must support the goals and objectives of the Parks and Recreation Master Plan as approved or amended by the Park Board.
- Priority 1: Programs and services that directly contribute to the cost recovery objective of the department, are high priorities of the public and for which there is a demonstrated demand or expectation for the department to offer, or are legally mandated to be provided.
 - Parks: Greenways, Open Space, playgrounds, splash pads, trails
 - Facilities: Monon Community Center, The Waterpark, Central Dog Park, program pavilions
 - Programs: Aquatics, Extended School Enrichment/Summer Camp series, Fitness/Wellness
 - Other Services: Inclusion, Natural, cultural and land resource management
- Priority 2: Programs and services that are value-added or complimentary to Priority 1 Services that build brand loyalty or directly or indirectly contribute to cost recovery expectations.
 - Facilities: Shelter (rentable)
 - Programs: Adaptive, Nature
 - Other Services: Concessions, KidZone
- Priority 3: Program and services for which there is an unmet need within the community and the department is well-positioned to provide that do not detract from cost recover objectives.
 - Programs: Creative Arts, Enrichment, Homeschool, Science & Technology, Senior, Sports



CHAPTER THREE – PROGRAMMING

3.1 RECREATION PROGRAMMING LONG-TERM GOALS

The goal of the recreation sub-division is to create award-winning and innovative programs for the citizens of the Carmel, Indiana and Clay Township communities that fall into one of the National Recreation and Parks Association's three pillars: social equity, conservation, or health and wellness. To accomplish this, the following planning goals are established:

1. **Provide a balance of program offerings across the city of Carmel by better utilizing the existing parks and greenways owned and maintained by Carmel Clay Parks & Recreation. (Social Equity)**
 - a. Create continuous coordination between Recreation, ESE, and Parks divisions to better utilize existing resources and collaborate between divisions to ensure a balance of program offerings is being maintained throughout the Department.
 - b. Identify population/demographics in Carmel, Indiana and Clay Township by geographical area.
 - c. Construct targeted surveys to determine needs/wants by geographical area.
 - d. Ensure that under-utilized parks are represented in program proposals each season.
 - e. Utilize compiled data to formulate program offerings based on the needs/wants of each geographical community.
 - f. Ensure a balance of Summer Camp Series opportunities by offering diverse programs at multiple locations throughout the Carmel/Clay community.
 - g. Collaborate with CCPR Marketing Team to create specialized marketing plans to reach new participants and promote programming at locations outside of the Monon Community Center and Central Park.
2. **Provide recreation programs that focus on *environmental education* and *park stewardship* by utilizing existing natural resource infrastructure. (Conservation)**

Environmental education: defined as increasing awareness of nature and the environment through experiential-based activities, hands-on learning, and interpretation.

Park Stewardship: defined as volunteer stewardship projects, Adopt-a-Park participation, individual monitoring efforts, and volunteering instructors.

- a. Create continuous coordination between Recreation, ESE, and Parks divisions to maintain a variety of program offerings and opportunities focused around nature education and exploration.
- b. Develop program offerings and opportunities designed around the intent for the Department to gain tangible benefits as a result of the skills obtained by participants.
- c. Develop program offering and opportunity coordination between divisions to create a reciprocal feed of participants between skill-based instruction (fee-based) and application-based instruction (park system benefit).
- d. Strengthen the infrastructure for informal/unstructured, yet educational, opportunities throughout the CCPR park system.

3. **Evaluate existing programs to determine current and future gaps in service for underserved or unserved populations such as senior citizens, adaptive, cultural diversity, at-risk youth/teens, etc. (Social Equity)**
 - a. Identify underserved or unserved populations in Carmel, Indiana and Clay Township.
 - b. Evaluate the programs that are currently being provided to underserved or unserved populations by CCPR.
 - c. Evaluate and map the programs that are currently being provided for underserved or unserved populations by other local organizations.
4. **Seek innovative solutions to serve identified underserved or unserved populations. (Social Equity)**
 - a. Develop individualized goals for CCPR programming staff to encourage the research, identification, planning, and execution of innovative programs geared towards the identified underserved or unserved populations.
 - b. Utilize compiled data to formulate program offerings to meet the unmet needs of these populations throughout our Program Areas and Categories.
 - c. Expand upon current successful partnerships to reach underserved or unserved populations.
 - d. Create new partnerships with identified local organizations to fill current and future gaps in service for underserved or unserved populations.
 - e. Continue to develop and evaluate internal reporting of populations served through CCPR programs and partnerships.
5. **Design and implement fitness and wellness program offerings based upon community needs, current trends, and best practices. (Health and Wellness)**
 - a. Evaluate current local and nation-wide trends, challenges, and critical health and wellness issues.
 - b. Develop targeted surveys to Monon Community Center members that will help identify wants/needs regarding new and current fitness and wellness offerings.
 - c. Utilize compiled data to develop innovative and effective fitness and wellness program offerings for all age groups focusing specifically on at-risk populations.
 - d. Ensure fitness and wellness components are integrated into the Extended School Enrichment programs through supplemental enrichment offerings focused on the needs and current trends surrounding youth demographics.

3.2 RECREATION PROGRAM PARAMETERS

In order to best serve the community, while carrying out the department's vision of creating engaging programs for the residents of the City of Carmel and Clay Township, recreation programs should also adhere to a distinct set of parameters. These guidelines will aid CCPR in maintaining sustainability, while ensuring that all programs are more innovative/higher quality than what is currently being offered to the community. The following four recreation program parameters are established:

- Is considered a unique (no one else is offering) or higher quality (we do it better) program for participants

- Due to continued growth of the Monon Community Center, recreation programs must have minimal impact on MCC members, particularly in the West Building (Party Rooms, Gymnasium, or Multi-Purpose Room West)
- Meet at least one of the six program determinants as described in **Chapter Five**
- Not categorized as *Declining* for two consecutive seasons on the Program Life Cycle

3.3 OPPORTUNITY STATEMENTS

Using the recreation programming overarching goals as a guide, specific objectives are established, reviewed annually, and adjusted as necessary. These objectives are categorized by program focus area and/or age group, and they allow the divisions to measure outcomes and/or the desired impact by the program or service. The objectives are written as *Opportunity Statements* that provide the divisions with specific direction for each program area. Each Opportunity Statement is supported by technical research and is evaluated annually. See **Appendix C** for all Opportunity Statements. The Opportunity Statements are categorized by CCPR's Program Areas and Categories.

Opportunity Statements are a direct result of a comprehensive data collection process that identifies gap area(s) between existing programming and future programming. First, a program assessment is performed that reviews participation data, program evaluations, lifecycle stages, and performance measure indicators. This provides a baseline understanding of the current service provision and overall “health” of the recreation program portfolio. Second, a community needs assessment is performed via a statistically-valid community survey, similar provider analysis, and demographic and trends analysis. This information provides a broader planning context that can then be compared to the existing service provision. Lastly, the “gap” area(s) are identified and transitioned in to *Opportunity Statements*. The Opportunity Statements are written as actionable steps CCPR can take to improve or enhance the existing service provision in light of community needs and industry best practices.

Opportunity Statements should be used to inform the action/implementation plan associated with the *Comprehensive Program Plan*. Additionally, all statements should be reviewed annually for completion status, relevancy, and any adjustments that need to be made as a result of annual program evaluations.



CHAPTER FOUR – PROGRAM AND SERVICE STATISTICS

4.1 FRAMEWORK

The divisions utilizes a comprehensive framework to track program and service statistics. ACTIVE Network software is used for program registrations and it helps produce reports that track:

- Participation trends/enrollment status
- Age segmentation served
- Cancellation rates
- Program locations
- Time of day trends
- Day of the week/class format trends

The divisions updates the statistics after each programmatic season (i.e., fall/winter, spring/summer, etc.). The information gleaned is used to adjust program service provision in order to keep current with user base trends. These statistics are an important part to begin the conversation of changing a program's format, location, or the way in which the sub-division provides a given program or service. All information can be analyzed by specific data sets along with analyzing the program areas and categories as a whole.

4.2 EXAMPLE PROGRAM AND SERVICE STATISTICS TRACKED AND MEASURED

The following figures represent example data that is collected and reviewed after each programmatic season. The example to follow is data from the Aquatics program area. It should be noted that the data that follows is representative of the program area and category as a whole and is not presented as specific activities. Also, these charts represent a two-year trend in which the sub-division can use to benchmark specific programmatic season statistics against.

4.2.1 ACTIVITY ENROLLMENT

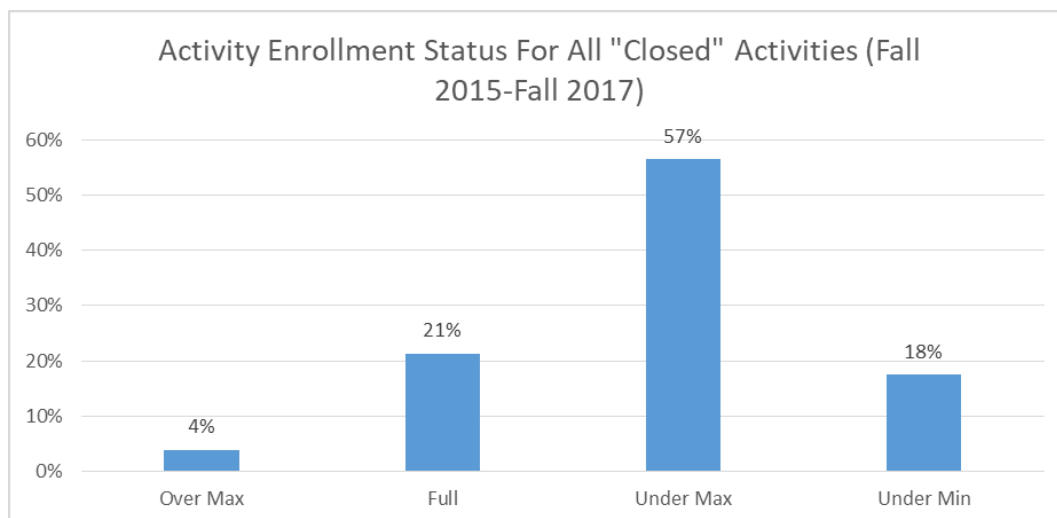


Figure 1: Example Activity Enrollment Statistics Tracked

4.2.2 AGE SEGMENTATION SERVED

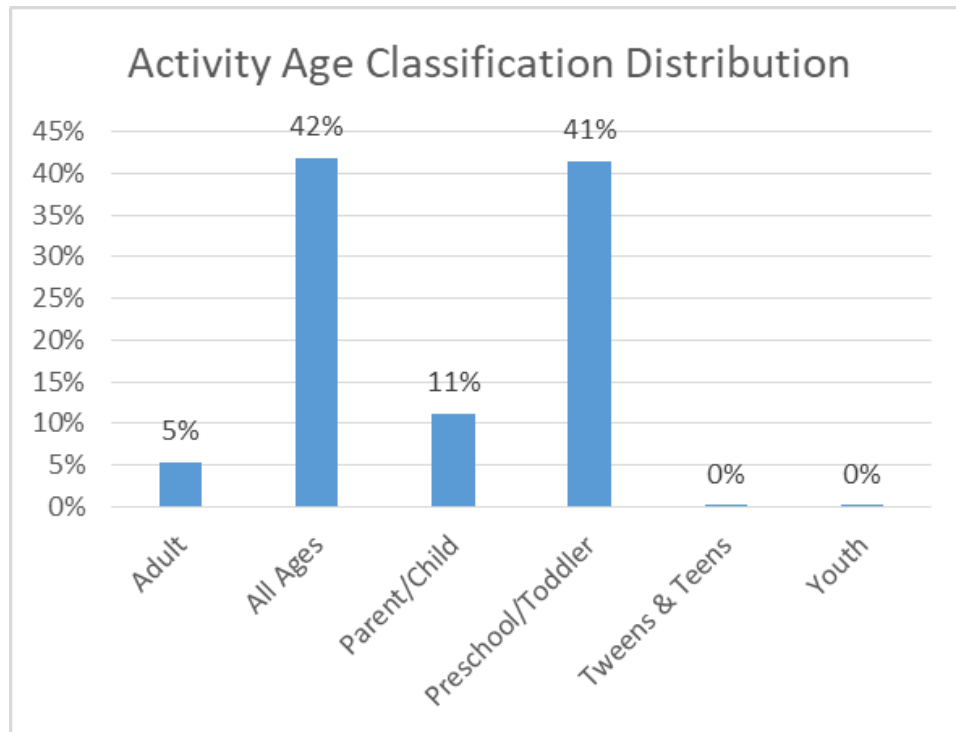


Figure 2: Example Activity Age Classification Statistics Tracked

4.2.3 CANCELLATION RATES

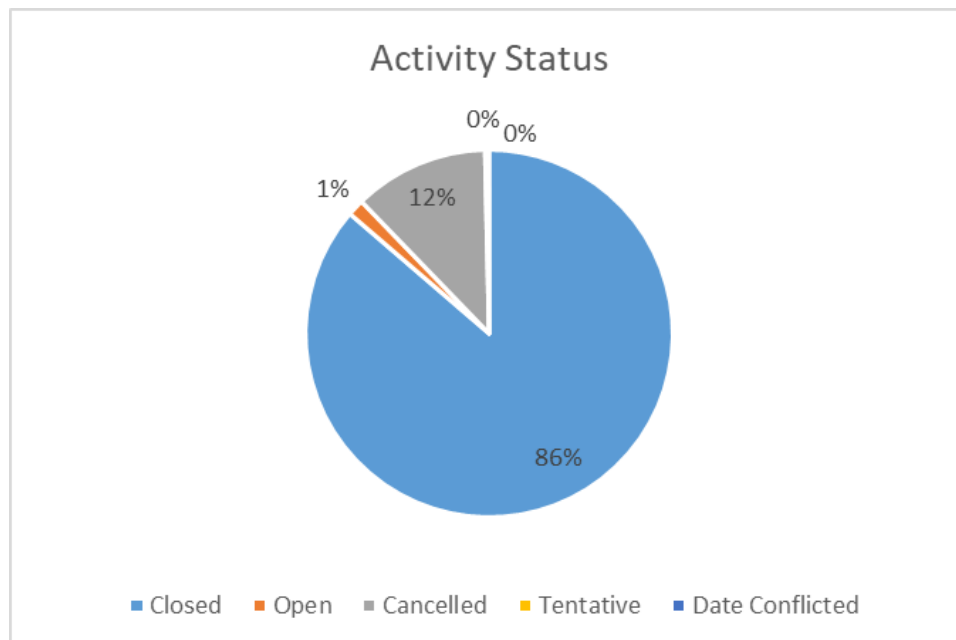


Figure 3: Example Activity Status Statistics Tracked

4.2.4 PROGRAM LOCATIONS

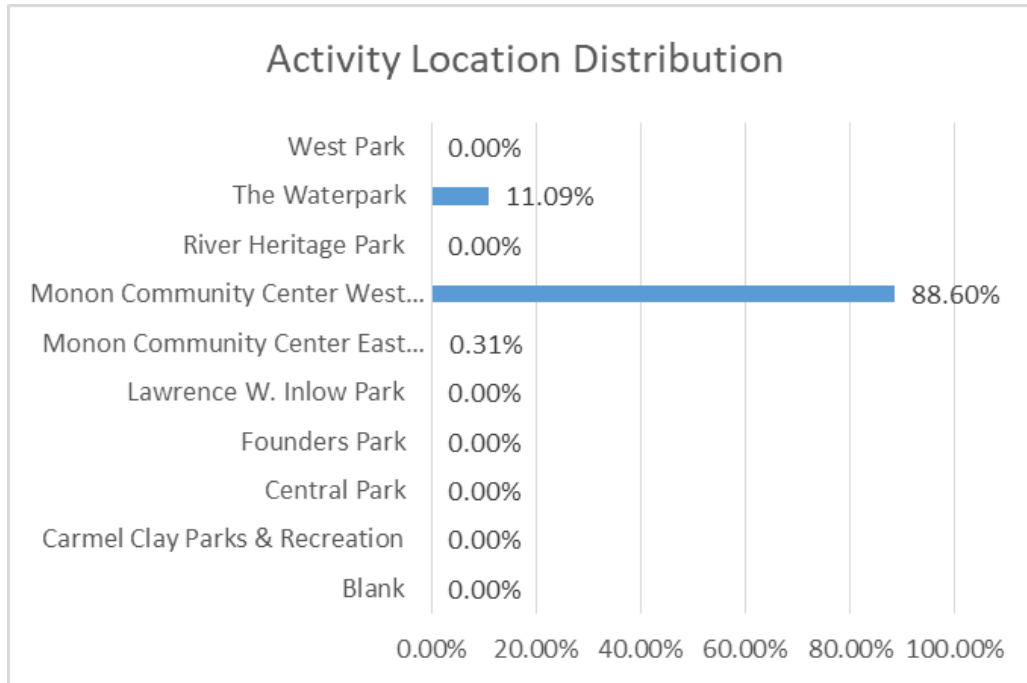


Figure 4: Example Activity Location Statistics Tracked

4.2.5 TIME OF DAY DISTRIBUTION

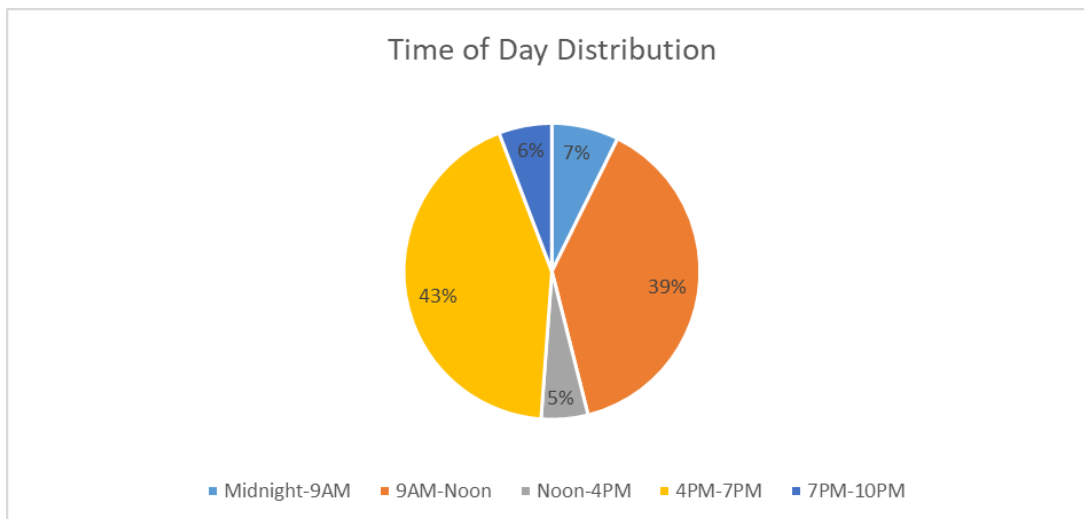


Figure 5: Example Activity Time of Day Statistics Tracked

4.2.6 DAY OF THE WEEK DISTRIBUTION

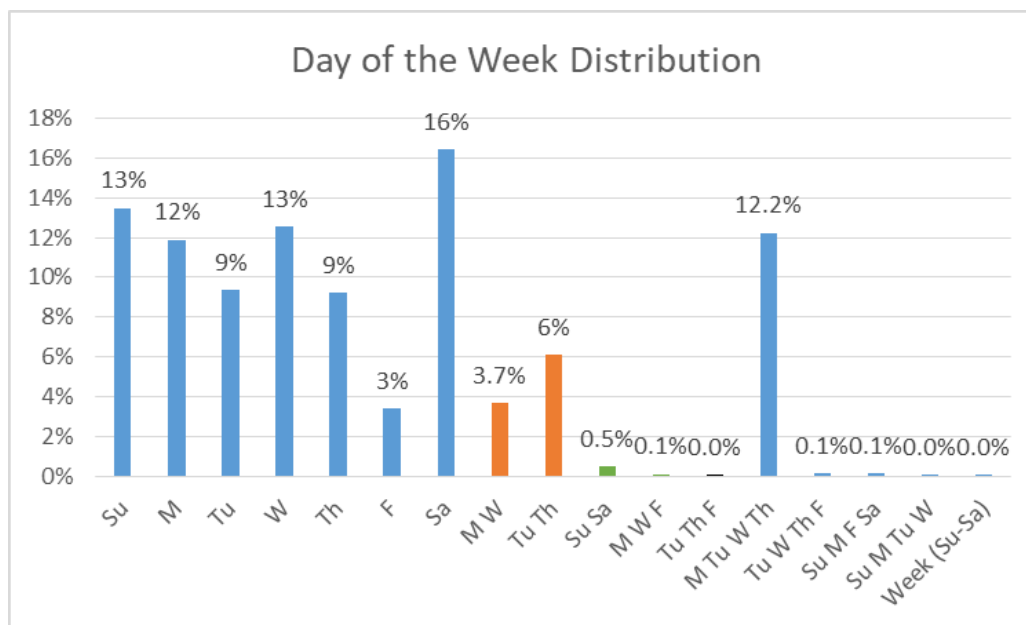


Figure 6: Example Activity Day of the Week Statistics Tracked

4.3 RECREATION PROGRAMMING EVALUATION

Program evaluations help the sub-division decide what programs should be implemented and what programs need to be changed or dissolved. Programs are generally created to address some sort of social need and have desirable results in mind. However, without a systematic evaluation method to explore whether or not the desired goals and social need(s) are being met, programmers are left with little empirical evidence justifying programmatic decisions. The recreation sub-division must be able to answer the following questions:

- What are the nature and scope of the problem? Where is it located, whom does it affect, how many are affected, and how does the problem affect them?
- What is it about the problem or its effects that justifies new, expanded, or modified programs?
- What feasible adjustments are likely to significantly ameliorate the problem?
- What are the appropriate target populations for a program?
- Is a particular program reaching its target population?
- Is the program being implemented well? Are the intended services being provided?
- Is the program effective in attaining the desired goals or benefits?
- Is the program cost reasonable in relation to its effectiveness and benefits?

The answers to these questions can be found through two different evaluation methods: *summative* and *formative* evaluations. A *summative* evaluation assesses how the program was conducted to meet its stated goals after the program has culminated. Conversely, a *formative* evaluation, or process evaluation, assesses activities undertaken to furnish information to decision makers that will guide program improvement while the program is running. Having

both evaluation methods in-place allows the sub-division to apply a systematic methodology to alter programs while they are running in addition to adjustments made after the fact. Using summative evaluation methods alone for program evaluations is difficult because they leave little to no time for efficient program alteration before the next session is to be planned and implemented.

4.3.1 SUMMATIVE EVALUATION KEY PERFORMANCE MEASURES (KPI)

The three primary evaluation sources are electronic surveys, hand-written program evaluations, and ACTIVE Network reports. The following KPIs represent the measures used to evaluate programs using a *summative* process:

- Customer satisfaction rating
- Internal staff meetings/debriefs
- Cost recovery targets
- Community survey findings
- Environmental scan (i.e., market saturation/niche)
- Statistical trends from the categories mentioned in 5.1.1-5.1.6

4.3.2 FORMATIVE EVALUATION KEY PERFORMANCE MEASURES (KPI)

The primary evaluation source is first-hand observation and assessment from programmers. The following KPIs represent the measures used to evaluate programs using a *formative* process:

- Activity-specific participation trends (*are we filling our activities to the expected level?*)
- Age segmentation distribution (*are we attracting who we are targeting?*)
- Participant feedback (*are we meeting the expectations of our participants?*)

4.3.3 CURRENT EXTENDED SCHOOL ENRICHMENT (ESE) PROGRAM EVALUATION

The Extended School Enrichment and Summer Camp Series programs measure success by the means of surveys. Three times throughout the year, surveys are sent to parents/guardians to obtain their feedback. The surveys represent a longitudinal approach as survey instrument questions have been in place since inception of the program and were developed by the ESE Director and Assistant Director. ESE Survey results are compared on a yearly basis, season to season. This provides the ESE Director with useful information as to whether or not the changes made have been successful

Once feedback is provided and data is compiled, any comments or recommended changes are discussed through a series of review teams. They begin with the ESE Director and Assistant Director addressing the feedback. From there, it goes to the Site Supervisor level, and finally down to the Assistant Site Supervisor, Head Counselor and Kid Counselor level. Often, a change is requested for the entire ESE/SCS program; however, if it is a school-specific change, Supervisor staff at that school will implement the change.

The survey reports provide graphs that show an increase or decrease in participation and overall satisfaction. Survey findings are presented to staff and are available for review to the Carmel/Clay Board of Parks and Recreation.

ESE program evaluations can be categorized as summative, occurring at the conclusion of each semester.

4.4 CREATING AND USING EVALUATIONS

New recreation programs will be evaluated for the first two instances of the program. If evaluation results do not yield “very good” or “excellent” responses for both of those two instances, surveys will be conducted until results are positive for two consecutive instances. Current programs or events with major changes (as determined by the Recreation Program Supervisor or Recreation Services Manager) will be treated as new programs and will follow the new program evaluation schedule. Current programs with no major changes will be surveyed once every three instances or a minimum of once per year. Feedback may be solicited more frequently if the program supervisor needs additional information for decision making.

Recreation Program Supervisors are responsible for survey creation using the Master Survey Template in paper form or web-based survey. The Master Survey Template may include 1-3 questions that will be asked on every survey along with program-specific questions that will be created by the Program Supervisor. The survey may be distributed electronically via Survey Monkey or in paper form as the Program Supervisor deems necessary.

Upon survey completion and analysis, the Recreation Program Supervisor will complete Evaluation Summary Sheet and provide it to the Recreation Manager. These evaluations stimulate adjustments to program offerings as well as input for new program offerings. Personnel involvement in the review stage is key to the implementation of program adjustments and/or new programming within the department. A sampling of the adjustments resulting from program evaluations are as follows:

- Hours of Operation (increased number of hours open to summer campers) based upon feedback from an electronic survey
- Additional program offerings (i.e., Pickleball, badminton, table tennis) based upon feedback from both an electronic survey and hand written evaluations
- Adjustment of program instructor (external contracted instructor) based upon hand written evaluations



CHAPTER FIVE – PROGRAM AND SERVICE DETERMINANTS

5.1 FRAMEWORK

The Department recognizes the need to approach recreation programming in a way that emphasizes specific individual, social, environmental, and economic benefits, rather than just focusing on the recreation activities themselves. It is the Department's philosophy that we design our program offerings around the direct needs of the community and national trends. When determining the need to offer a program, we first look to see if that need is being met by another community organization, department, or company. **The Department will only offer a program if it finds that needs are *unmet* in the surrounding area.**

5.1.1 CONCEPTUAL FOUNDATIONS OF PLAY, RECREATION, AND LEISURE

Has important developmental implications for participants. Elements and characteristics of leisure experiences contribute directly to the development of identity, autonomy, competence, initiative, civic duty, and social connections.

Programs offered by the Department have clearly stated objectives and goals, an element of choice, and a future direction for continuance, improvement, or change. Program planning elements address physical, social, cognitive, and emotional goals for participants.

5.1.2 ORGANIZATIONAL AGENCY PHILOSOPHY, MISSION AND VISION, AND GOALS AND OBJECTIVES

Clearly meets a goal as determined by the five-year Parks Master Plan, or Recreation Implementation Plan. This could also be a program that is applicable to the CCPR vision/mission statements.

5.1.3 CONSTITUENT INTERESTS AND DESIRED NEEDS

Program needed by the community. Community currently lacks this program, or there may be a strong desire to participate in this program if offered.

Key tasks include reviewing previous program plans, consideration of future population growth and demographics, identifying potential partnership opportunities for additional recreation services, and researching current and future trends.

5.1.4 CREATION OF A CONSTITUENT-CENTERED CULTURE

Reaching out to the community to serve the underserved. With a commitment to providing high quality programming to the underserved populations, Carmel Clay Parks & Recreation places an emphasis on focused program planning to meet the needs of the underserved. In doing so, Carmel Clay Parks & Recreation has offered programs ranging from adult to teen, special events, as well as adaptive. Each year, CCPR catalogues and tracks the programs specifically designed to serve identified underserved populations. Please see **Appendix D** for the most recent program review and corresponding programmatic additions as a result.

5.1.5 EXPERIENCES DESIRABLE FOR CLIENTELE

The mission of Carmel Clay Parks & Recreation is to strengthen our community and serve residents through the acquisition, development, and management of high-quality, innovative parks and facilities for recreation, preservation, and programming.

The Department also complies with a non-discrimination policy and encourages inclusion for all people regardless of their ability, into all programs and services. This is evident by the department's statement of accessibility. CCPR also strives to meet the needs of underserved populations through a multitude of programs for seniors, adults, teens, youth, and fitness.

5.1.6 COMMUNITY OPPORTUNITIES

New opportunity that could benefit the community, based on demographic information and current trends in Parks & Recreation.

The City of Carmel continues to be a hub for business opportunities in Hamilton County, Indiana and the Indianapolis Metropolitan Area. With continued residential and commercial growth, the department needs to ensure that it is continuing to offer adequate and evolving leisure opportunities. Other opportunities with private businesses, local non-profit organizations and service clubs should also continue to be sought out by way of partnerships.



CHAPTER SIX – RECREATION AND LEISURE TRENDS ANALYSIS

6.1 FRAMEWORK

National, regional, and local recreation trends are a vital component of overall program planning. The recreation sub-division utilizes *The Sports & Fitness Industry Association's (SFIA) Sports, Fitness & Recreational Activities Topline Participation Report* to track national trends. The latest report available for analysis (2018) is detailed in our Comprehensive Master Plan. Additionally, both the *U.S. Census Bureau* and *Environmental Systems Research Institute, Inc. (ESRI)*, the largest research and development organization dedicated to Geographical Information Systems (GIS), are used to collect and analyze local market data and trends.

For more information regarding the most current Recreation and Leisure Trends Analysis, please refer to **Appendix B**.

6.1.1 PROGRAM LOCATION ANALYSIS

In addition to the overall recreation and leisure trends for the Carmel community, the recreation sub-division also analyzes trends based on park programming locations. This information is used in tandem with evaluation metrics that look at program location distribution by program area and category. It is important to analyze and investigate the surrounding populations when deciding about future program locations. The following figure shows the demographic differences (and similarities) among a 15-minute drive time from six potential (and current) programming locations.

2017 Demographic Comparison		Founders Park	Hazel Landing Park	Lawrence W. Inlow Park	West Park	Monon Community Center	River Heritage Park
Population	Annual Growth Rate (2010-2017)	1.72%	1.51%	2.21%	2.30%	1.21%	1.28%
	Projected Annual Growth Rate (2017-2032)	1.66%	1.46%	2.04%	2.10%	1.30%	1.51%
Households	Annual Growth Rate (2010-2017)	1.71%	1.46%	2.27%	2.16%	1.41%	1.26%
	Average Household Size	2.49	2.39	2.62	2.51	2.23	2.48
Age Segment Distribution	Ages 0-12	16%	16%	18%	18%	15%	16%
	Ages 13-17	7%	7%	8%	8%	6%	7%
	Ages 18-34	22%	24%	19%	19%	21%	22%
	Ages 35-54	28%	27%	29%	29%	26%	28%
	Ages 55-64	13%	13%	13%	13%	14%	13%
	Ages 65-74	8%	8%	8%	8%	10%	8%
	Ages 75+	5%	5%	5%	6%	8%	5%
Race Distribution	White Alone	83.7%	82.0%	86.3%	76.1%	81.3%	82.9%
	Black Alone	4.8%	5.7%	3.3%	9.4%	5.4%	5.1%
	American Indian	0.1%	0.1%	0.1%	0.2%	0.2%	0.1%
	Asian	7.1%	7.4%	6.8%	9.7%	8.4%	7.4%
	Pacific Islander	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Some other Race	2.0%	2.5%	1.4%	1.9%	2.4%	2.1%
Hispanic/Latino Population	Two or More Races	2.3%	2.4%	2.0%	2.7%	2.3%	2.3%
	Hispanic / Latino Origin (any race)	4.7%	5.3%	3.6%	5.1%	5.6%	4.8%
Income Characteristics	All Others	95.3%	94.7%	96.4%	94.9%	94.4%	95.2%
	Per Capita Income	\$46,164	\$45,568	\$47,404	\$52,214	\$43,798	\$46,016
Income Characteristics	Median Household Income	\$84,622	\$80,125	\$97,006	\$94,339	\$68,552	\$85,552

Figure 7: Key Surrounding Demographic Statistics by Programmable Park

6.1.2 PROGRAM LOCATION TRENDS ANALYSIS

Along with the demographic analysis for programming locations, local market research data is gathered and analyzed to understand the market proclivities of certain areas within the community. The following figure represents one example data point: general sport market potential for all six programming locations. All numbers above 100 indicate the area's proclivity for consuming that particular recreation behavior is above the national average. It should be noted, however, that this is only one recreation category that is analyzed for local recreation trends (fitness, outdoor activities, and commercial recreation).

Local Participatory Trends - General Sports												
Activity	Founders Park		Hazel Landing Park		Lawrence W. Inlow Park		West Park		Monon Community Center		River Heritage Park	
	Estimated Participants	MPI	Estimated Participants	MPI	Estimated Participants	MPI	Estimated Participants	MPI	Estimated Participants	MPI	Estimated Participants	MPI
Golf	7,707	139	7,060	140	6,351	143	6,674	140	4,485	134	6,088	139
Basketball	5,313	99	4,862	100	4,118	96	4,598	100	3,049	94	4,193	99
Tennis	3,307	137	3,052	139	2,736	142	3,255	157	1,646	113	2,657	140
Soccer	3,277	120	3,041	122	2,618	120	3,006	128	1,722	104	2,597	120
Baseball	3,140	108	2,910	111	2,452	106	2,877	116	1,898	109	2,497	110
Football	3,095	96	2,765	94	2,507	97	2,874	104	1,736	89	2,442	96
Softball	2,349	113	2,220	118	1,795	108	2,212	125	1,408	113	1,854	114
Volleyball	2,258	107	2,072	107	1,762	104	2,013	111	1,345	105	1,756	105

Figure 8: Local Sports Market Potential Index (MPI) Scores by Programmable Park Surrounding Population

6.2 INTEGRATING TRENDS INTO PROGRAMMING

In order to fulfill the NRPA Three Pillars (Social Equity, Health & Wellness, and Conservation), national trend analyses assist with program service provision. Local participation data, community engagement results, and national trends are integrated to provide a fuller understanding of the recreational landscape within the community. When a community gap is identified, programmers refer to trends to understand the nature and type of programmatic options that seem to be working across the country. These potential programmatic candidates can then be analyzed in the local market context.



CHAPTER SEVEN – COMMUNITY INVENTORY

7.1 SIMILAR PROVIDERS

In addition to the CCPR programming inventory, the community is served by other public agencies along with non-profit and private providers. In order to understand the full programmatic offerings provided to the community, an environmental scan, or similar provider analysis, is performed regularly. This also helps CCPR understand its market niche and overall market saturation (or lack thereof) for a given activity. The following map represents the similar providers identified to-date and include areas such as: local parks (not CCPR inventory), health/fitness organizations, soccer organizations, baseball organizations, basketball/sports organizations, aquatic centers, and churches. A similar provider information table and number key is located in **Appendix E**.

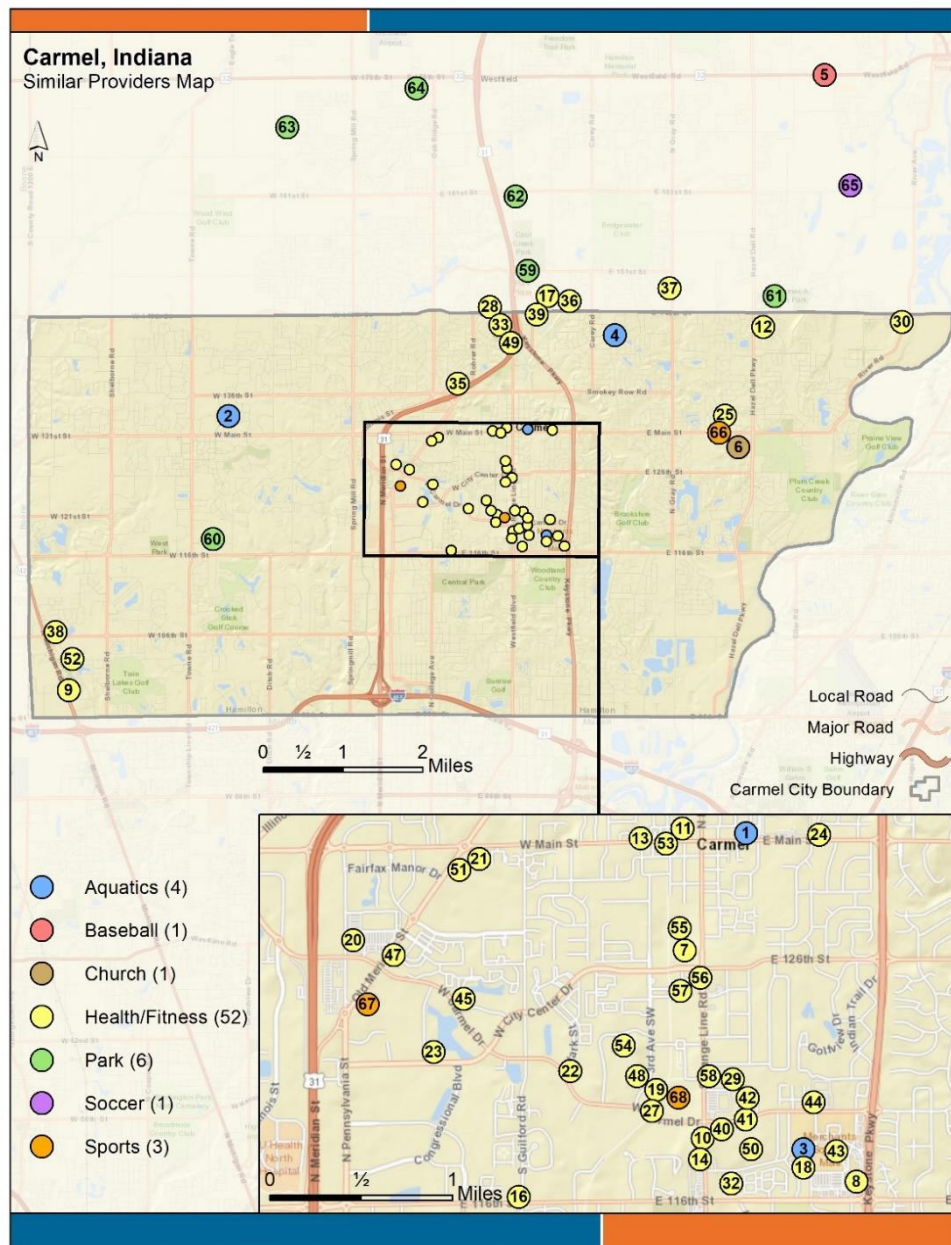


Figure 9: Identified CCPR Similar Providers Map

7.1.1 PROGRAM MARKET POSITION

For each Program Area and Category, similar providers were assessed to see the *magnitude* of service provision within (and close to) the CCPR boundaries (expanded search from previous section's maps). This information provides insight as to how many providers operate, the kinds of programs offered, and where they are located. Additionally, the program areas are cross-referenced to include where residents indicate an underserved market still exists. It is through this information that CCPR can understand its market position and make a decision as to whether it is the most appropriate organization to provide a given service, another organization is better positioned, or a partnership between one or more agencies (including CCPR) is warranted.

To understand CCPR's market position and assist with identifying potential underserved markets, the planning boundaries were separated into "areas":

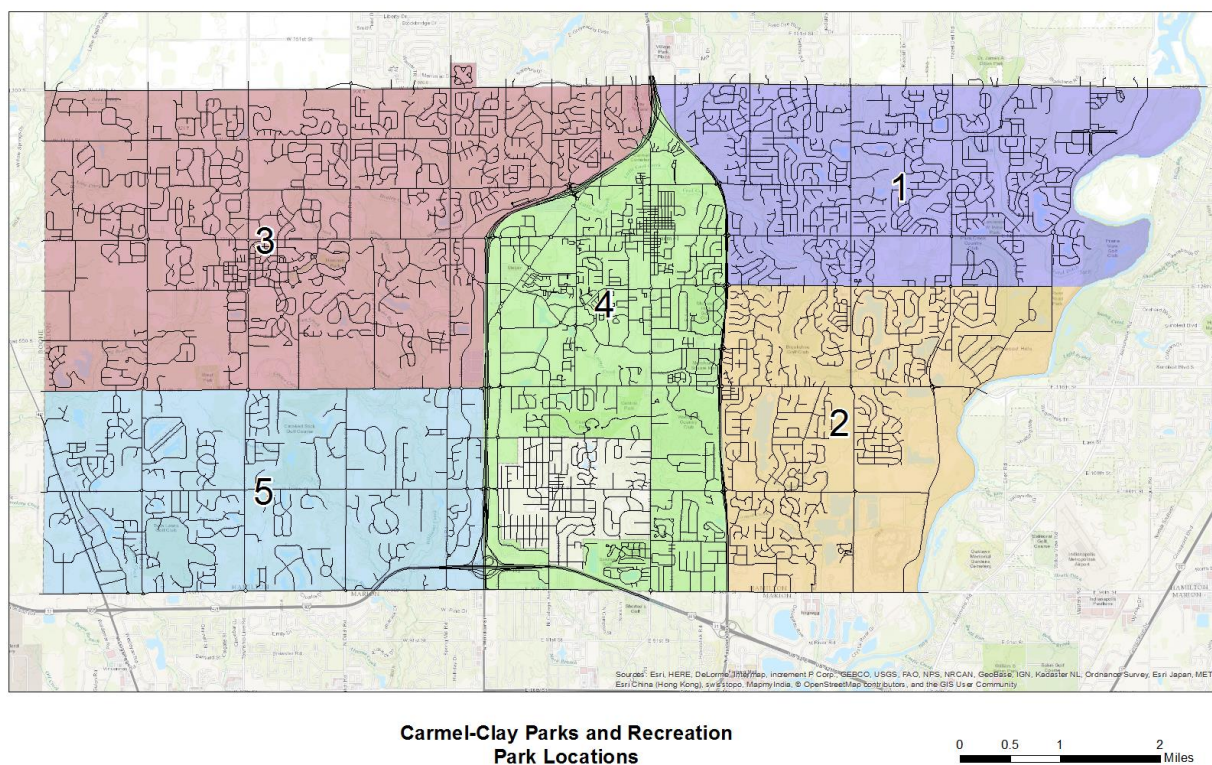


Figure 10: Area Segmentation Used to Separate CCPR's Community

A similar provider analysis was conducted that served to:

1. Indicate the "major" providers of similar services in and around Carmel
2. Indicate the providers' concentration, or focus, on delivering those type of services
3. Indicate the community's reporting of need, unmet need, and area(s) of most unmet need according to the most recent statistically-valid community survey

The following figures represent the similar provider analysis and corresponding context.

Core Program Area	Key Service Provider	Magnitude of Concentration	Type of Programs Offered	CCPR-Wide Need	CCPR-Wide Unmet Need Level	Area(s) of Most Unmet Need
Adaptive	CCPR	High	Aquatics, Sports, Fitness, Enrichment, Arts & Crafts, Socials & Special Events/Activities	Adult: 8% Preschool: 1% Youth/Teen: 2%	Adult: 22% Preschool: 0% Youth/Teen: 20%	Adult: 1 and 4 Preschool: N/A Youth/Teen: 4
	Indy Parks	Medium	Karaoke, Creative Arts/Crafts, Water Exercise, Sensory Room			
	YMCA of Greater Indianapolis	Medium	Aquatics, Sports			
Aquatics	CCPR	High	Learn to Swim, Competition	Adult: 22% Preschool: 9% Youth/Teen: 11%	Adult: 31% Preschool: 35% Youth/Teen: 26%	Adult: All areas Preschool: 2, 3, 4, and 5 Youth/Teen: 1, 3, 4, and 5
	Carmel Aquatic Center	High	Learn to Swim, Competition, Open Swim			
	Fairmont Pool & Gym	Low	Open Swim			
	Goldfish Swim School	High	Learn to Swim, Open Swim			
	Indy Parks	High	Learn to Swim, Competition, Aquatic Exercise			
	LA Fitness	Low	Aquatic Exercise			
	Stony Creek Swim Center	High	Learn to Swim, Camps			
	YMCA of Greater Indianapolis	High	Learn to Swim, Open Swim, Competition, Aquatic Exercise			
Dance	CCPR	Medium	Instruction, Performances	Adult: 15% Preschool: 6% Youth/Teen: 8%	Adult: 45% Preschool: 37% Youth/Teen: 33%	Adult: All areas Preschool: 2, 3, and 4 Youth/Teen: All areas
	Ballet Theatre of Carmel Academy	High	Instruction, Performances			
	Carmel Ballroom Dance Studio	High	Instruction			
	Darren's Ballroom Dance Studio	High	Instruction			
	Five Star Dance Studio	High	Instruction			
	Fred Astaire Dance Studio	High	Instruction, Competition			
	Indiana Ballet Conservatory	High	Instruction, Performances			
	Indy Dance Academy	High	Instruction, Performances			
	Indy Parks	Medium	Instruction			
	Noblesville Parks and Recreation	Low	Instruction			
	Performer's Edge Dance Studio	High	Instruction, Competition			
	Sho'time Dance Company	High	Instruction			
	Spectrum Sports	Low	Instruction (Cheerleading Dance)			
	Village Dance Studio	High	Instruction, Performances			
	Westfield-Washington Parks and Recreation	Low	Instruction			
Enrichment	CCPR	High	Development/Learning, STEM, Art, Camps, After School, Programs with Your Pet, Art	Adult Art: 21% Family Programs: 19% Preschool Art: 6% Preschool Summer Camp: 5% Programs with Your Pet: 19% Senior programs: 28% Youth/Teen Art: 10% Youth/Teen Summer Camp: 9%	Adult Art: 46% Family Programs: 33% Preschool Art: 79% Preschool Summer Camp: 31% Programs with Your Pet: 65% Senior programs: 36% Youth/Teen Art: 33% Youth/Teen Summer Camp: 21%	Adult Art: All areas Family Programs: All areas Preschool Art: 1, 2, 3, and 4 Preschool Summer Camp: 1, 2, 3, and 4 Programs with Your Pet: All areas Senior programs: All areas Youth/Teen Art: 1, 3, 4, and 5 Youth/Teen Summer Camp: 1, 2, 3, and 4
	Fishers Parks and Recreation	High	Development/Learning, Language, Health			
	Indy Parks	High	Development/Learning, Art, After School, Homeschool, Meal Program			
	Noblesville Parks and Recreation	Medium	Development/Learning, STEM, Art			
	St. Lukes Church	High	Development/Learning, Art			
	Westfield-Washington Parks and Recreation	High	Development/Learning, STEM, Art			
	YMCA of Greater Indianapolis	High	Development/Learning, STEM, Art			

Figure 11: Similar Provider Analysis by Program Area Part I

Core Program Area	Key Service Provider	Magnitude of Concentration	Type of Programs Offered	CCPR-Wide Need	CCPR-Wide Unmet Need Level	Area(s) of Most Unmet Need
Fitness	CCPR	High	Group Fitness, Personal Training, Pilates, Martial Arts, Yoga, Tai Chi	Adult: 62% Youth/Teen: 10%	Adult: 20% Youth/Teen: 17%	Adult: All areas Youth/Teen: 1, 2, 3, and 4
	Fishers Parks and Recreation	Low	Group Fitness			
	Indy Parks	Medium	Group Fitness			
	LA Fitness	High	Group Fitness, Personal Training			
	Noblesville Parks and Recreation	Medium	Group Fitness			
	Northview Church	Low	Races (5K runs)			
	Planet Fitness	High	Group Fitness			
	Westfield Parks and Recreation	Low	Races (5K runs)			
	Westfield-Washington Parks and Recreation	Medium	Group Fitness			
	YMCA of Greater Indianapolis	High	Group Fitness, Personal Training, Races (5K runs)			
	Private Entities*	High	Group Fitness, Personal Training, Pilates, Martial Arts, Yoga, Boxing, Cycling			
Nature	CCPR	Low	Nature Education	Adult: 24% Preschool: 7% Youth/Teen: 8%	Adult: 45% Preschool: 46% Youth/Teen: 30%	Adult: All areas Preschool: 1, 2, 3, and 4 Youth/Teen: All areas
	Fishers Parks and Recreation	Medium	Nature Education, Geocaching			
	Hamilton County Parks and Recreation	High	Nature Education, Guided Hikes, Camps/Field Trips			
	Indy Parks	High	Nature Education, Guided Hikes, Camps/Field Trips			
	Noblesville Parks and Recreation	Medium	Nature Education, Guided Hikes			
	St. Lukes Church	Low	Camps/Field Trips			
	Westfield-Washington Parks and Recreation	Medium	Nature Education, Guided Hikes			
	Zionsville Parks and Recreation	Medium	Nature Education, Camps/Field Trips			
Outdoor Recreation/Adventure	CCPR	Low	Archery	Adult: 35%	Adult: 37%	Adult: All areas
	Hamilton County Parks and Recreation	High	Camping, Archery, Aerial Park, Equestrian			
	Indy Parks	High	Ziplining, Sailing, Rowing, Canoeing, Kayaking, Boating			
Sports	CCPR	High	Pickleball, Tumbling, Tball, Basketball, Tennis, Baseball, Football, Volleyball, Futsal, Karate, Fencing	Adult: 30% Preschool: 8% Youth/Teen: 14%	Adult: 38% Preschool: 41% Youth/Teen: 13%	Adult: All areas Preschool: 1, 3, and 4 Youth/Teen: 1, 3, and 4
	Carmel Dad's Club	High	Soccer, Baseball, Softball, Basketball, Cheerleading, Football			
	Carmel Racquet Club	High	Pickleball, Racquetball, Tennis			
	Fishers Parks and Recreation	Low	Softball			
	Hamilton County Parks and Recreation	Low	Softball			
	Hollywood Sports Center	High	Paintball, Airsoft			
	Indy Parks	High	Badminton, Baseball, Softball, Basketball, Football, Futsal, Ice Skating, Pickleball, Soccer, Tennis, Volleyball			
	Lil' Kickers	High	Soccer			
	Noblesville Parks and Recreation	Medium	Pickleball, Soccer, Tumbling			
	Spectrum Sports	High	Gymnastics, Cheerleading			
	Team Witsken Tennis	High	Tennis, Pickleball			
	YMCA of Greater Indianapolis	High	Soccer, Baseball, Basketball, Cheerleading, Football, Tennis			

*55 private fitness organizations identified within CCPR boundaries.

Figure 12: Similar Provider Analysis by Program Area Part II

CCPR's market position can be improved for nature education, outdoor recreation/adventure recreation, adult sports, and aquatic programming. Nature education and outdoor recreation/adventure recreation are indicated as to having larger unmet need percentages by residents. Additionally, focus areas such as adult sports and aquatic programming can be a larger focus for CCPR if facility space allows. Conversely, CCPR's market position for adaptive and fitness programming is strong. It should be noted, however, that the fitness programming market is saturated by many private organizations. It is imperative to monitor CCPR fitness programming and membership numbers closely as more private entities "pop-up" over time.

7.1.2 PROGRAMMING BY PARK

CCPR is also interested in bringing programming to its parks. Specifically, five parks/facilities were listed as potential program sites on the community-wide survey. Community residents were first asked if they have a "need" for a particular activity regardless of who provides it within the community. Second, residents that responded "yes" then indicated how well their need is being met on a 5-point scale. A response of 2 or 1 indicates "unmet need." Finally, respondents were asked to indicate the top four most important activities to their household. **Figure 13** represents this analysis by residents indicating the specific park site they would like to see programmed more.

Park/Facility	Top Five Most "Needed"	Top Five Most "Important"	Top Five Most "Unmet" Need
<i>Founders</i>	Adult Health/Fitness	Adult Health/Fitness	Preschool Art
	Adult Outdoor Recreation	Adult Outdoor Recreation	Preschool Nature/Environment
	Adult Nature/Environment	Senior Programs	Adult Performing Arts
	Adult Sports	Adult Aquatics	Programs with Your Pet
	Senior Programs	Youth/Teen Sports	Adult Art
<i>Inlow</i>	Adult Health/Fitness	Adult Health/Fitness	Adult Programs for People with Disabilities
	Adult Outdoor Recreation	Adult Outdoor Recreation	Preschool Art
	Adult Nature/Environment	Youth/Teen Sports	Preschool Nature/Environment
	Adult Sports	Adult Aquatics	Preschool Summer Camp
	Family Programs	Senior Programs	Programs with Your Pet
<i>MCC</i>	Adult Health/Fitness	Adult Health/Fitness	Preschool Art
	Adult Outdoor Recreation	Adult Outdoor Recreation	Programs with Your Pet
	Adult Sports	Senior Programs	Preschool Sports
	Adult Nature/Environment	Adult Sports	Adult Nature/Environment
	Senior Programs	Adult Aquatics	Preschool Nature/Environment
<i>River Heritage</i>	Adult Health/Fitness	Adult Health/Fitness	Preschool Art
	Adult Outdoor Recreation	Adult Outdoor Recreation	Preschool Nature/Environment
	Adult Nature/Environment	Adult Aquatics	Programs with Your Pet
	Adult Sports	Youth/Teen Sports	Adult Sports
	Adult Art	Family Programs	Preschool Summer Camp
<i>West</i>	Adult Health/Fitness	Adult Health/Fitness	Preschool Art
	Adult Outdoor Recreation	Adult Outdoor Recreation	Programs with Your Pet
	Adult Sports	Senior Programs	Preschool Sports
	Family Programs	Adult Sports	Adult Art
	Adult Nature/Environment	Programs with Your Pet	Preschool Nature/Environment

Figure 13: Program Need, Importance, and Unmet Need Matrix by Programmable Park/Facility Location

Figure 13 should be used as an initial decision-making tool for programmers with a deeper analysis conducted utilizing demographic and trends information, local programming trends, similar providers, and overall community survey results (among other available sources). The following steps are recommended for interpreting and using **Figure 13**:

1. **First**, programmers should understand what the most “needed” and “important” programs are for a given area (first and second column)
2. **Second**, programmers should look at the market to understand how much of those top activities are being offered by similar providers and CCPR (Chapter 7) because the first two columns *do not* indicate there is necessarily an “unmet need”
3. **Third**, activities that are in the top five in the first two columns should be seen as *priority* activities for those residents as they relate to the park spaces and so overall community service provision should be at least maintained within the surrounding park area
4. **Fourth**, “unmet need” (third column) should be examined to see if any activities are also present in either of the first two columns. If yes, these activities should be considered first for new park programming. If no, these activities should still be considered for new park programming but at a smaller scale as they may be geared toward a more “niche” target market.
5. **Fifth**, *any* activity not in red text in the first two columns should be considered for new park programming but at a smaller scale as they may be geared toward a more “niche” market

According to **Figure 13**, adult health/fitness and adult outdoor recreation are identified as the two most important need/importance areas for residents overall. However, they are also identified as needs that are currently being met by CCPR or another source. Therefore, CCPR is focused on further meeting the unmet needs of the community surrounding these parks. Of note, adult sports for River Heritage, programs with your pets at West Park, and adult nature/environment programs at MCC are three activities that are identified with “unmet need” *and* either most needed or important by surrounding households. Additionally, where there are no correlations (but still have high unmet needs) staff should secondarily look for other innovative opportunities to meet those unmet needs, given the park provides the correct assets and resources for those programs.

7.2 SCOPE OF OPPORTUNITIES

Carmel and Clay Township have a wealth of resources and organizations that clearly value the role of parks and recreation in improving community livability and quality of life. CCPR works with many public and private groups to provide outstanding services in meeting the community needs. Maintaining an awareness of alternative providers in the Carmel and Clay Township community is valuable to the Department in order to minimize duplication, reduce competition, and to optimize recreational opportunities for our community. Additionally, the Parks and Recreation Master Plan identifies community organizations and opportunities in areas such as arts, community events, community resources, museums, recreation, and youth and children’s events and programs. In many instances, CCPR cooperatively programs with public, commercial, and non-profit entities. Examples Include:

- Partnerships
 - Carmel Clay Historical Society
 - Citizens for Greenspace
 - Easter Seals Crossroads
 - Hamilton County Convention & Visitors Bureau
 - Hamilton County Sports Authority
 - Girl Scouts of Central Indiana
 - Hoosier Mountain Bike Association
 - Indiana Department of Natural Resources
 - Indiana Park and Recreation Association
 - Indiana Wildlife Federation
 - Special Olympics Indiana
 - Booth Tarkington
 - Carmel Clay Public Library
 - Carmel Mayor's Youth Council
 - Humane Society for Hamilton County
 - City of Carmel (Bike to Work Day)
 - Safe Sitter
- Outsource/Contracts
 - Carmel Clay Schools - Before and After School Program
 - Sports Associations
 - 100% Hoops
 - Indiana Pacers
 - USA Table Tennis
 - Carmel Marathon
 - Off the Wall Sports
 - Indianapolis Fencing Club
 - Adamson's Karate Studio

CCPR has initiated partnerships with various providers in the community and has been open to establishing relationships with other providers as well. Through the timeframe of this plan and into the future, CCPR should look strategically at the use of partnerships to help meet community needs. Arrangements should be formalized when necessary. Recommendations for the development of partnerships include the following:

- Nurture partnership relationships to encourage formal and equitable partnership agreements with public, non-profit, and private agencies to help meet community needs.
- Foster and seek partnership with other public, non-profit, private, and community agencies to align with CCPR's vision and mission.
- Assign staff to coordinate partnership efforts.
- Cultivate partnerships that support the Department's mission while leveraging community resources and reducing duplication of services.
- Establish equitable and collaborative partnership policies to address the following:

- Articulation of mutually-agreed upon priorities, including well-defined costs and benefits for all partners involved, as well as the benefits to the community.
- Determination of the decision-making authority, such as the level or type of approval required by each partner.
- Management and procedures for regular review of partnership agreements, including the determination of key joint decision points, mitigation measures if any partners fail to meet their obligations, and types of exit strategies.
- Administer, execute, and monitor partnership agreements.
- Manage and regularly assess outcomes and cost-benefits of partnership agreements.

7.2.1 PROGRAMMING COLLABORATION

As indicated in the park and facility analysis, there are a number of opportunities for Carmel Clay Parks & Recreation to collaborate with other providers for recreation programming. CCPR should consider the following:

- Facilitate partnerships to maximize programming efficiency and opportunities for residents.
- Seek business and corporate partners to endow scholarships for programming.
- Discuss opportunities to promote community gardening, such as at school sites for education and HOA open space areas for recreation. Community gardening is growing trend in recreation, which may include developing and maintaining vegetable gardens, orchards, flower gardens, and other specialty gardens.
- Seek nature-based and outdoor adventure groups to assist with new programming as CCPR develops facilities as appropriate.
- Work with Carmel CAN, youth groups, senior groups, and other special interest groups to encourage volunteer activities in parks.



CHAPTER EIGHT – SUPPORTING RECREATION PROGRAM IMPLEMENTATION

8.1 CONTEXT

Beyond the specific recreation functions outlined in this plan, the Department also ensures support mechanisms are in place to aid with recreation program implementation and overall effectiveness. Three of those supporting mechanisms are:

1. Volunteerism
2. Marketing
3. Human Resources

8.2 VOLUNTEERISM

Being involved in the community is important to Carmel Clay residents. Carmel Clay Parks & Recreation encourages school, civic and religious organizations, scouts, seniors, and park neighbors to help at special events and in parks, trails and greenways. In addition, an independent website, Carmel CAN! coordinates local community volunteers. Through this initiative, citizens looking for volunteer opportunities are matched up with those organizations that are in need of volunteers.

Communities are recognizing that many people volunteer during their leisure time. For this reason, many recreation departments support volunteerism as a program service area. CCPR should investigate opportunities to expand and better market volunteer opportunities. This includes identifying volunteer opportunities that would appeal particularly to seniors and teens, but also for youth, adults, and families. Since residents expressed a desire to spend more time outdoors, continued expansion of outdoor projects for volunteers should be pursued. One way to market volunteerism is by advocating the benefits of being a volunteer. For example, through volunteerism, community members can:

- Be physically active;
- Meet people;
- Learn something new;
- Invest in community pride;
- Promote environmental and resource stewardship;
- Create healthy, happy childhoods for children;
- Support a social cause or interest;
- Leave a legacy;
- Memorialize or honor a loved one;
- Make Carmel Clay a safer place; and
- Give a tax deductible gift to the community.

For Carmel Clay Parks & Recreation, increased volunteerism will expand resources for maintenance, environmental restoration, and recreation programs. In a time of increased competitiveness for funding, volunteers greatly benefit the community by augmenting the work of park and programming staff.

8.3 MARKETING

Every five years, Carmel Clay Parks & Recreation (CCPR) re-evaluates its strategic Community Relations + Marketing Plan, which encompasses an overarching marketing strategy for the Department, editorial calendar, social calendar, marketing efforts, and SMART goals for each priority area.

Based on The Department's Prioritization of Services outlined in Chapter 2.3.1, the Marketing Department has three overarching priorities that are utilized in making key marketing decisions as it pertains to programming. For more specific tactics tied to the below priorities, refer to the *Community Relations + Marketing Plan*.

8.3.1 PRIORITY 1

The Marketing Department focuses its primary strategy of revenue generation on increasing Monon Community Center membership and retention, The Waterpark day pass sales, Central Dog Park membership, and other department facilities. By focusing on and marketing heavily the products and services with revenue generation, Department cost recovery goals can be met.

The Marketing Department's secondary strategy under this priority focuses on the park system as a whole. This covers individual parks, playgrounds, splash pads and trails, as well as initiatives that emphasize inclusion and natural, cultural and land resource management. This strengthens CCPR's mission by full-filling community needs through the acquisition, development, and management of high-quality and innovative parks.

Within Recreation Programming, there are specific categories that consistently bring in more revenue throughout the year. Due to their higher revenue generation, the Marketing Department heavily promotes aquatics, Extended School Enrichment, Summer Camp Series (full and ½ day), as well as fitness and wellness programs through year-round efforts.

8.3.2 PRIORITY 2

Marketing is responsible for promoting the overall CCPR brand and educating the community on its core values and the benefits of the programs it offers. These areas help build brand loyalty or directly or indirectly contribute to cost recovery expectations.

Within Recreation Programming, marketing promotes adaptive and nature programming through year-round efforts. These two areas are high-importance categories within the CCPR brand and community, and are two areas where outreach and education to niche audiences is very important.

8.3.3 PRIORITY 3

Within this priority, the Marketing Department's focus is recreation programming. Their efforts are tailored to specific types of programs offered such as creative arts, enrichment, homeschool, science and technology, senior and sports. Seasonal marketing tactics are assigned based on conversations between the Marketing Department and the Recreation Programming Team. The primary objective for marketing at this priority level is to foster a broad view of product awareness by centering marketing resources on program category promotions to maximize marketing efforts.

While the Marketing Department is the driver behind the strategy and tactics, it is a collaborative effort of all divisions within CCPR. For the Recreation Programming Team, it is important to take into consideration the long-term goals established in Chapter 3. Thus, when working together as one cohesive unit, marketing based on these priorities should yield a positive result including increased participation and product awareness.

8.4 RISK MANAGEMENT

The Department places great emphasis on risk management and as such has established a formal Risk Management Plan and Emergency Action Plan. The benefits to a comprehensive risk management plan, and a commitment to constant vigilance in this area, pay significant dividends. Risk management provides good stewardship of taxpayer dollars as financial, human and physical resources are protected and conserved. In addition, it provides cost-effective operational strategies to reduce the frequency and severity of potential liabilities and subsequent associated costs. The participant's experience is improved in direct relation to the limiting of exposure to unreasonable risks. Undoubtedly, an effective risk management approach increases participant and staff safety, confidence and productivity.



CHAPTER NINE – IMPLEMENTATION

9.1 IMPLICATIONS

To fully implement the goals, objectives, and overall programmatic directions outlined in this plan, CCPR will have to concentrate on the following areas:

- Staff development
- Program evaluation key performance indicators (KPIs)
- Capital development (infrastructure) commensurate with recreation programming needs
- Community outreach and marketing

9.2 REVIEW AND UPDATE

This plan will be reviewed annually during the winter, prior to budget planning for the coming fiscal year, and in conjunction with the preparation of the Department's Business Plan for the coming fiscal year. The focus of this planning meeting is to review budget performance, including participation trends, analyze emerging trends within recreation and identify unmet and ongoing community needs. A review of the *Comprehensive Program Plan* will help ensure that the Department is responding to the anticipated growth of the community. Department staff also participate in seasonal program planning meetings, which include a review of evaluation data for all programs and services and progress of goals/objectives. Many Department staff members participate in these meetings, including the Director of Parks and Recreation, Assistant Director of Parks and Recreation, ESE Director, ESE Assistant Director, Parks & Natural Resources Director, Recreation & Facilities Director, Recreation & Facilities Assistant Director, Recreation Services Manager, and Recreation Programming Supervisors.



CHAPTER TEN – APPENDICES

10.1 APPENDIX A: COMMUNITY SURVEY

10.1.1 OVERVIEW

ETC Institute administered a needs assessment survey for Carmel Clay Parks and Recreation during the winter of 2017. The survey was administered as part of Carmel Clay Parks and Recreation's Comprehensive Recreation Program Plan for residents. The survey and its results will help guide Carmel Clay Parks and Recreation in taking a resident-drive approach to making decisions that will enrich the future of the City and positively affect the lives of our residents.

10.1.2 METHODOLOGY

ETC Institute mailed a survey packet to a random sample of households in the City of Carmel. Each survey packet contained a cover letter, a copy of the survey, and a postage-paid return envelope. Residents who received the survey were given the option of returning the survey by mail or completing it on-line at www.CarmelSurvey.org.

Ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage participation. The emails contained a link to the on-line version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of the City of Carmel from participating, everyone who completed the survey on-line was required to enter their home address prior to submitting the survey. ETC Institute then matched the addresses that were entered on-line with the addresses that were originally selected for the random sample. If the address from a survey completed on-line did not match one of the addresses selected for the sample, the on-line survey was not counted.

The goal was to obtain completed surveys from at least 400 residents. The overall results for the sample of 400 households have a precision of at least +/-4.9% at the 95% level of confidence.

10.1.3 PROGRAM PARTICIPATION AND RATINGS

Thirty-six percent (36%) of households surveyed indicated that they had participated in programs offered by Carmel Clay Parks and Recreation during the past 12 months. This figure is aligned with the national participation rate of 34%. Most respondents (79%) indicated they participated in 3 or fewer programs during the past 12 months, 12% indicated they have participated in 4 to 6 programs, 5% participated in 7 to 10 programs, and 4% indicated they participated in 11+ programs during the past year. Ninety percent (90%) of respondents who have participated in a program offered by Carmel Clay Parks and Recreation rated the programs they participated in as either "excellent" (42%) or "good" (48%).

Forty-three percent (43%) of respondents who have participated in a program offered by Carmel Clay Parks and Recreation during the past 12 months indicated they participated in a group fitness program, 19% participated in a wellness program, and 19% have participated in an aquatics program.

The location of the program (66%), the value respondents receive for program fees (38%), and the times at which programs are offered (37%) are the three primary reasons households participate in programs offered by Carmel Clay Parks and Recreation.

More than half (51%) of respondents indicated their anticipated participation in Carmel Clay Parks and Recreation programs would remain the same over the next 12 months, 27% said their participation would increase, 8% were unsure, and 14% indicated they would participate less over the next 12 months.

10.1.4 BARRIERS TO PARK, FACILITY AND PROGRAM USAGE

Respondents were asked from a list of 14 potential reasons to identify what prevents them from participating in programs or prevents them from participating more often in programs offered by Carmel Clay Parks and Recreation. The top four reasons selected were: no time to participate (37%), fees are too high (29%), program times are not convenient (26%), and respondents do not know what is being offered (20%).

10.1.5 PROGRAMMING NEEDS AND PRIORITIES

Programming Needs. Respondents were asked to identify if their household has a need for 27 recreational programs and rate how well their needs for each program are currently being met. Based on this analysis, ETC Institute was able to estimate the number of households in the community that have “unmet” needs for each program.

The three programs with the highest percentage of households that have needs were: adult health and fitness programs (62%), adult outdoor recreation and adventure programs (35%), and adult sports programs (30%). In addition to having the highest total need, the same three programs also have the highest unmet need among the 27 programming-related areas that were assessed. ETC Institute estimates a total of 8,647 households have unmet needs for adult health and fitness programs, 6,799 households have unmet needs for adult outdoor recreation and adventure programs, and 6,237 households have unmet needs for adult sports programs. The estimated number of households that have unmet needs for each of the 27 programs that were assessed is shown in the chart below.

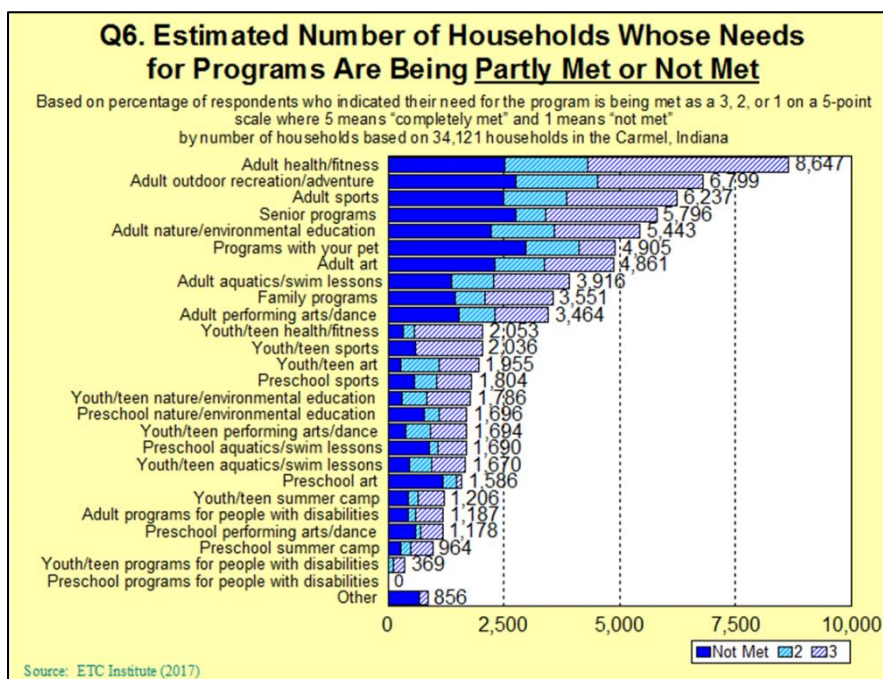


Figure 14: Estimated Number of Households with “Unmet” Need for Various Programs

Program Importance. In addition to assessing the needs for each program, ETC Institute also assessed the importance that residents place on each program. Based on the sum of respondents' top four choices, the three most important programs to residents are: adult health and fitness programs (48%), senior programs (20%), and adult outdoor recreation and adventure programs (20%).

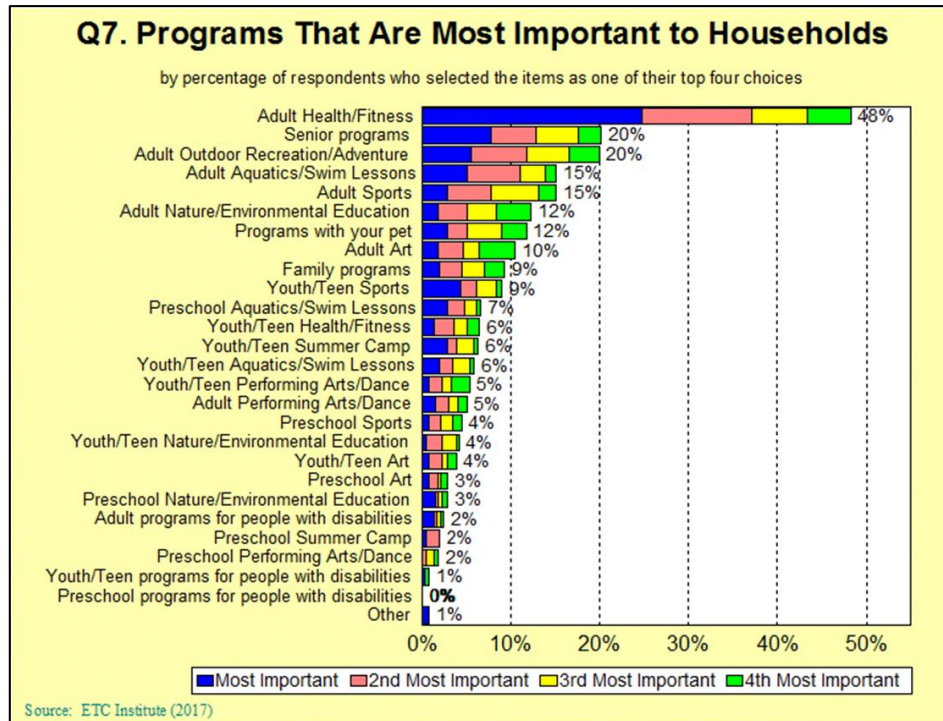


Figure 15: Programs That Are Most Important to Households

Priorities for Programming Investments. The Priority Investment Rating (PIR) was developed by ETC Institute to provide organizations with an objective tool for evaluating the priority that should be placed on Parks and Recreation investments. The Priority Investment Rating (PIR) equally weights (1) the importance that residents place on programs and (2) how many residents have unmet needs for the programs.

- Adult health/fitness programs (PIR=200)
- Adult outdoor recreation/adventure programs (PIR=120)
- Senior programs (PIR=109)
- Adult sports programs (PIR=103)

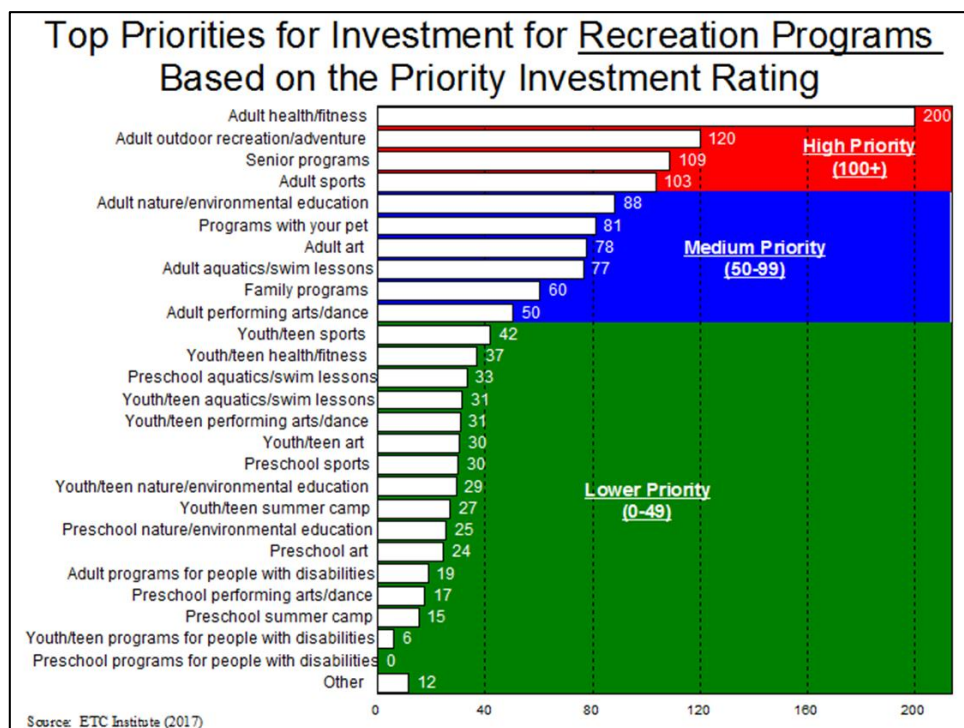


Figure 16: Recreation Programs Priority Investment Ratings (PIR)

10.1.6 MOST PREFERRED TIMES AND DAYS FOR PROGRAM PARTICIPATION

Respondents were asked a series of questions which asked them to indicate the day of the week, the time of day, and the frequency at which the members of their household would most prefer to use recreation programs offered by Carmel Clay Parks and Recreation. The table below shows the top two most preferred days, the rank for most preferred time of day, and the most preferred frequency of programs for each of the six household member types that were assessed.

	Child (Under age 6)	Youth (Ages 6-12)	Teen (Ages 13-17)	Adult (Ages 18-59)	Older Adult (Ages 60+)	Family
Day	1. Saturday	1. Saturday	1. Saturday	1. Saturday	1. Wednesday	1. Saturday
	2. Sunday	2. Sunday	2. Sunday	2. Sunday	2. Monday	2. Sunday
Time of Day	1. Morning	1. Evening	1. Evening	1. Evening	1. Morning	1. Evening
	2. Afternoon	2. Afternoon	2. Afternoon	2. Morning	2. Afternoon	2. Afternoon
	3. Evening	3. Morning	3. Morning	3. Afternoon	3. Evening	3. Morning
Frequency	One Program Per Week	One Program Per Week	One Program Per Week	One Program Per Week	One Program Per Week	Single Day

Figure 17: Most Preferred Times and Days for Program Participation

10.1.7 ADDITIONAL FINDINGS

The Carmel Clay Public Library (54%), Hamilton County Parks and Recreation (34%), and Private fitness clubs (28%) are the most used organizations for indoor and outdoor recreation activities during the past 12 months. The main reasons households use organizations other than Carmel

Clay Parks and Recreation for indoor and outdoor recreation activities were: program not offered by Carmel Clay Parks and Recreation (25%), programs fit my budget (24%), program times are more convenient (23%) and friends or family participate in programs offered by other organizations (22%). Group fitness programs were the most common program respondents indicated they participated in through an organization other than Carmel Clay Parks and Recreation.

Respondents were informed that Carmel Clay Parks and Recreation is interested in bringing recreation programs to more park sites within the community. Knowing this, respondents were asked to indicate which potential programming spaces their household would use. Seventy-one percent (71%) of respondents indicated they would use the Monon Community Center, 38% would use West Park, and 37% would use Founders Park. Based on the sum of respondents' top three choices Monon Community Center (65%), Founders Park (34%), and West Park (32%) were the three locations respondents indicated they would use most often. Seven percent (7%) of respondents indicated they would travel less than five minutes to participate in Carmel Clay Parks and Recreation programs that interest the members of their household, 27% would travel five to nine minutes, 44% would travel 10 to 14 minutes, 17% would travel 15 to 19 minutes, and 5% would travel 20 or more minutes.

10.1.8 CONCLUSIONS

Carmel Clay Parks and Recreation has done an excellent job ensuring residents receive information about programs, services, and activities using the methods respondents indicated they most prefer. Ensuring these items remain aligned will be beneficial moving forward. As Carmel Clay Parks and Recreation begins to implement their new Comprehensive Recreation Program Plan, keeping residents informed will be key to ensuring the high levels of satisfaction they are currently experiencing continue. The program brochure mailed to residents (79%) is the most common way respondent households learn about Carmel Clay Parks and Recreation programs and activities it is also the most preferred method.

Fifty-one percent (51%) of respondents indicated they are either “very satisfied” or “somewhat satisfied” with the overall value their household receives from Carmel Clay Parks and Recreation. In order to ensure they continue to meet the needs and expectations of the community, ETC Institute recommends that Carmel Clay Parks and Recreation sustain and/or improve the performance in areas that were identified as “high priorities” by the Priority Investment Rating (PIR). The programs with the highest PIR ratings are listed below.

Programming Priorities

- Adult health/fitness programs (PIR=200)
- Adult outdoor recreation/adventure programs (PIR=120)
- Senior programs (PIR=109)
- Adult sports programs (PIR=103)

10.2 APPENDIX B: RECREATION TRENDS ANALYSIS

10.2.1 DEMOGRAPHIC ANALYSIS

The Demographic Analysis describes the population within Carmel, Indiana. This assessment is reflective of the City's total population and its key characteristics such as age segments, race, ethnicity, income levels, and gender. It is important to note that future projections are based on historical patterns and unforeseen circumstances during or after the time of the analysis could have a significant bearing on the validity of the projected figures.

CITY DEMOGRAPHIC OVERVIEW

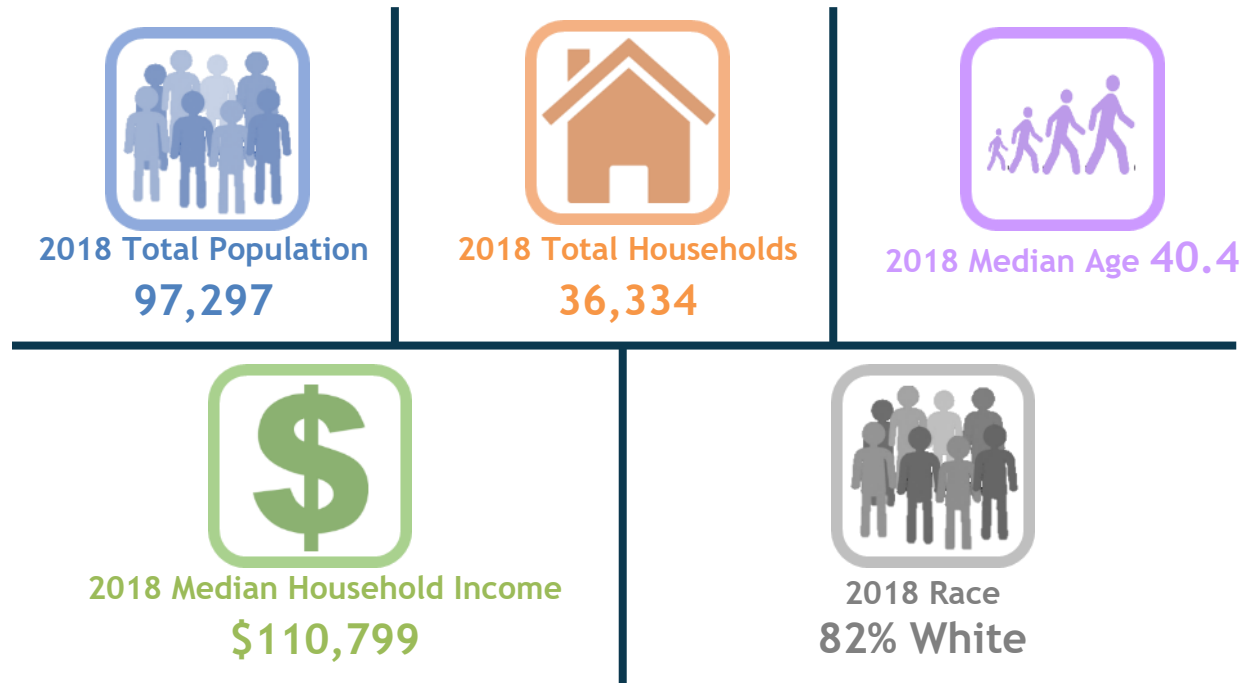


Figure 18: Carmel, IN Demographic Overview

METHODOLOGY

Demographic data used for the analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in June 2018 and reflects actual numbers as reported in the 2010 Census as well as estimates for 2018 and 2023 as obtained by ESRI. Straight line linear regression was utilized for 2028 and 2033 projections. The City boundaries shown below were utilized for the demographic analysis (**Figure 19**).

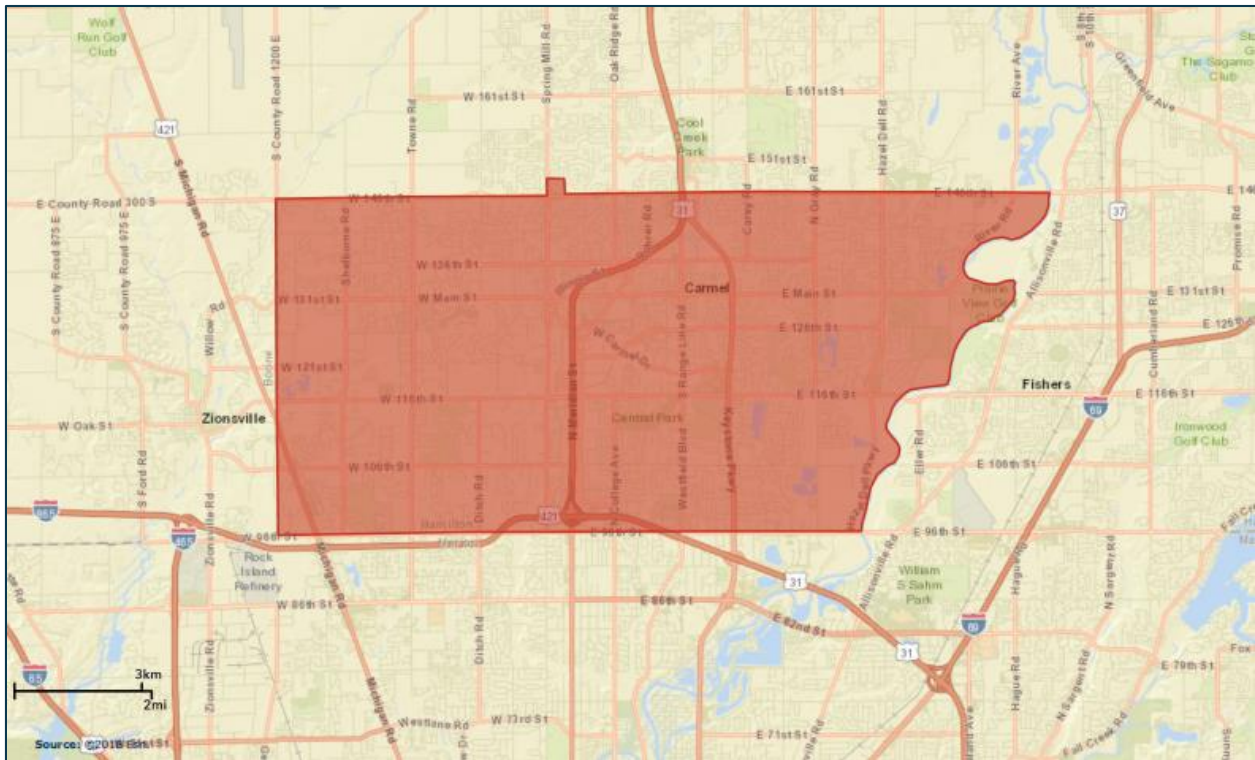


Figure 19: Service Area Boundaries

RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for Federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The Census 2010 data on race are not directly comparable with data from the 2000 Census and earlier censuses; therefore, caution must be used when interpreting changes in the racial composition of the US population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

- American Indian - This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment
- Asian - This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
- Black - This includes a person having origins in any of the black racial groups of Africa
- Native Hawaiian or Other Pacific Islander - This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
- White - This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- Hispanic or Latino - This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race

Please Note: The Census Bureau defines Race as a person's self-identification with one or more of the following social groups: White, Black or African American, Asian, American Indian and Alaska Native, Native Hawaiian and Other Pacific Islander, some other race, or a combination of these. While Ethnicity is defined as whether a person is of Hispanic / Latino origin or not. For this reason, the Hispanic / Latino ethnicity is viewed separate from race throughout this demographic analysis.

CITY POPULACE

POPULATION

The City's population experienced a significant growing trend in recent years, increasing 15.98% from 2010 to 2018 (2.00% per year). This is more than double the national annual growth rate of 0.86% (from 2010-2018). Similar to the population, the total number of households also experienced a rapid increase in recent years (17.40% since 2010).

Currently, the population is estimated at 97,297 individuals living within 36,334 households. Projecting ahead, the total population and total number of households are both expected to continue growing rapidly over the next 15 years. Based on 2033 predictions, the City is expected to have 128,394 residents living within 48,607 households (Figures 20 & 21).

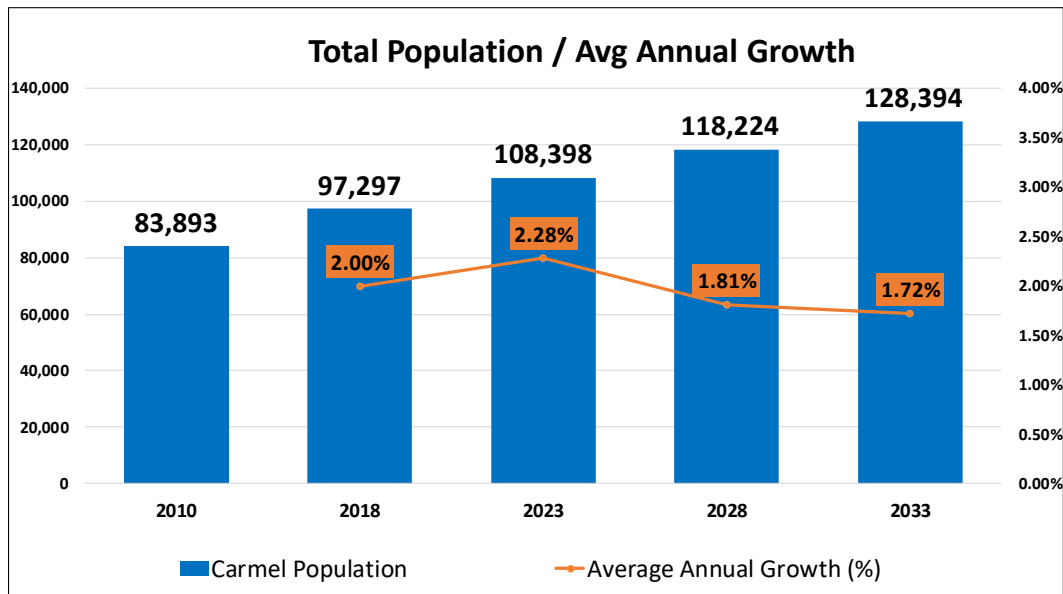


Figure 20: Service Area's Total Population

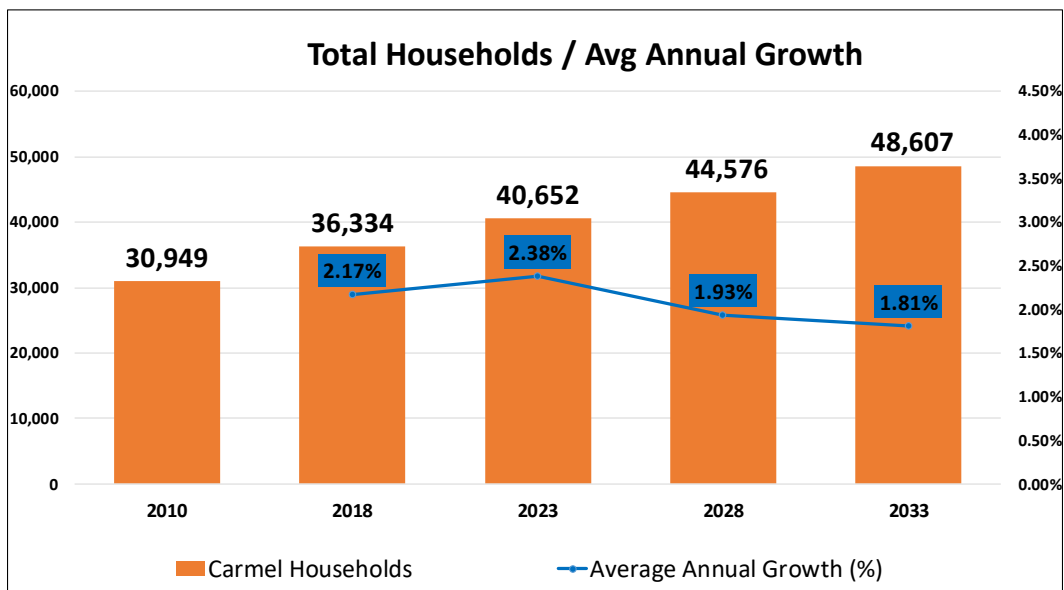


Figure 21: Service Area's Total Number of Households

AGE SEGMENT

Evaluating the City by age segments, Carmel is predominantly middle-aged, with just under a third of the population falling within the 35-54 segment. The service area has a median age of 40.4 years old which is slightly above the U.S. median age of 38.3 years. Assessing the population as a whole, the City is projected to continue its current aging trend. Over the next 15 years, the 55+ population is expected to grow to represent 35% of the City's total population. This is largely due to the increased life expectancies and the remainder of the Baby Boomer generation shifting into the senior age groups (**Figure 22**).

Due to the continued growth of the older age segments, it is useful to further segment the "Senior" population beyond the traditional 55+ designation. Within the field of parks and recreation, there are two commonly used ways to partition this age segment. One is to simply segment by age: 55-64, 65-74, and 75+. However, as these age segments are engaged in programming, the variability of health and wellness can be a more relevant factor. For example, a 55-year-old may be struggling with rheumatoid arthritis and need different recreational opportunities than a healthy 65-year old who is running marathons once a year. Therefore, it may be more useful to divide this age segment into "Active," "Low-Impact," and/or "Social" Seniors.

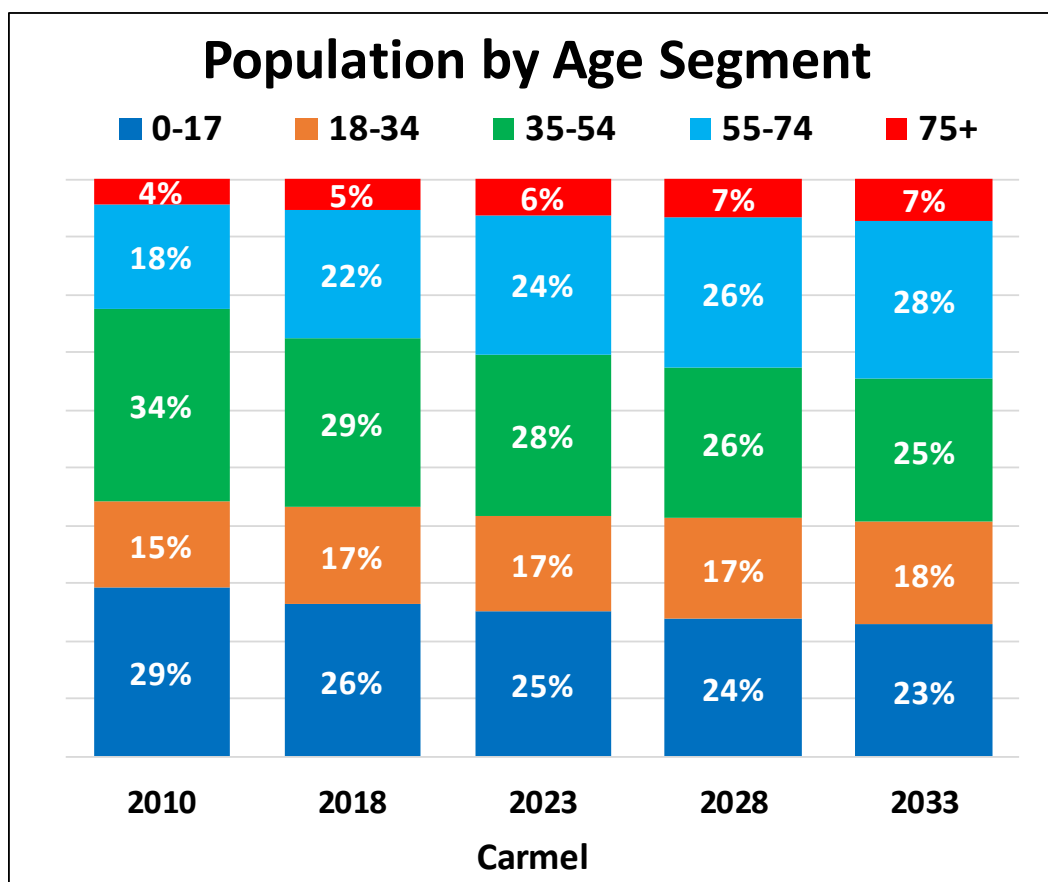


Figure 22: Service Area's Population by Age Segments

RACE

Analyzing race, the service area's current population is primarily White Alone. The 2018 estimate shows that 82% of the population falls into the White Alone category, while the Asian (11%) and Black Alone (4%) categories represent the largest minorities. The racial diversification of the City is less diverse than the national population, which is approximately 70% White Alone, 13% Black Alone, and 7% Some Other Race. The predictions for 2033 expect the City's population to continue diversifying, with the White Alone population projected to decrease (-7%) and the minority categories expected to experience slight increases (Figure 23).

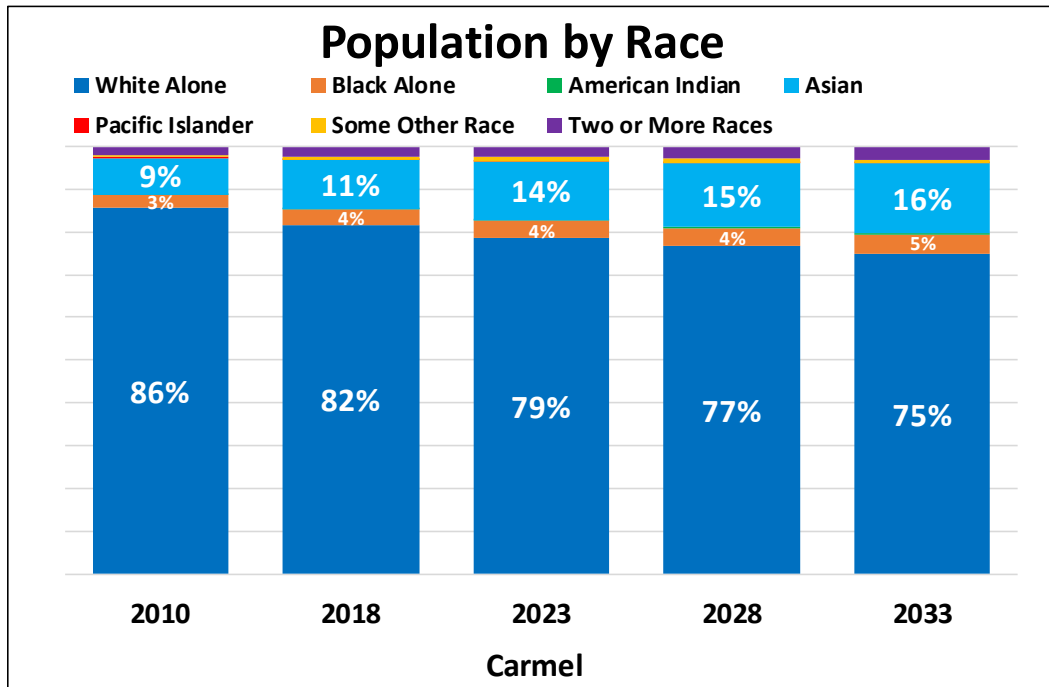


Figure 23: Service Area's Population by Race

ETHNICITY

The City's population was also assessed based on Hispanic/Latino ethnicity, which by the Census Bureau definition is viewed independently from race. It is important to note that individuals who are Hispanic / Latino in ethnicity can also identify with any of the racial categories from above. Based on the 2010 Census, those of Hispanic/Latino origin represent just above 3% of the service area's current population, which is significantly lower than the national average (18% Hispanic/Latino). The Hispanic/ Latino population is expected to grow slightly over the next 15 years, increasing to 5% of the City's total population by 2033 (Figure 24).

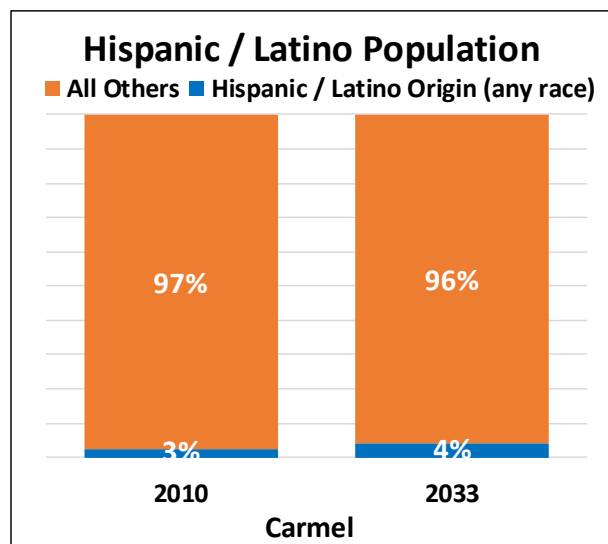


Figure 24: Service Area's Population by Ethnicity

HOUSEHOLD INCOME

The City's per capita income (\$53,504) and median household income (\$110,799) are both significantly higher than current state (\$27,871 & \$53,531) and national averages (\$31,950 & \$58,100). Additionally, as seen in **Figure 25**, both Carmel's per capita income and median household income are expected to continue growing over the next 15 years reaching \$69,044 & \$132,624 (respectively) by 2033.

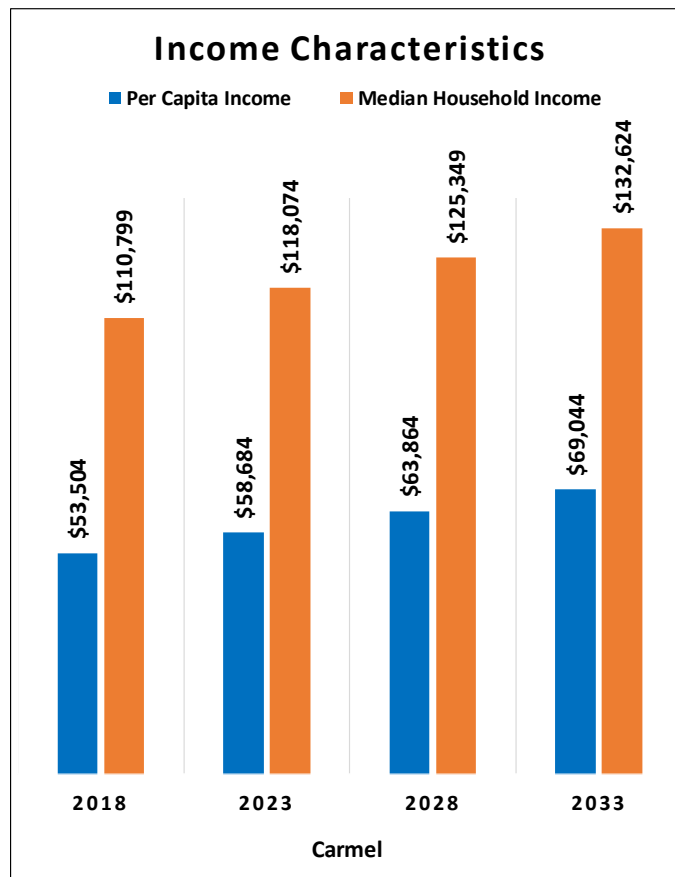


Figure 25: Service Area's Income Characteristics

GENDER

Carmel currently has a slightly higher female population (51%) than male (49%). This is expected to remain unchanged over the next 15 years, as shown in **Figure 26**.

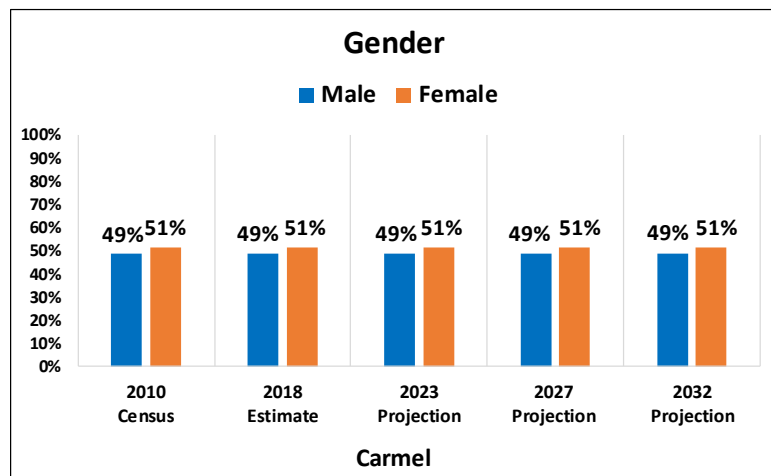




Figure 26: Service Area's Gender Breakdown

CITY DEMOGRAPHIC COMPARATIVE SUMMARY

The table below is a summary of the City's demographic figures. These figures are then compared to the state and U.S. populations. This type of analysis allows Carmel to see how their population compares on a local and national scale. The highlighted cells represent key takeaways from the comparison between the City and the national population.

 = Significantly higher than the National Average
 = Significantly lower than the National Average













2018 Demographic Comparison		Carmel	Indiana	U.S.A.
Population	Annual Growth Rate (2010-2018)	 2.00%	0.54%	0.86%
	Projected Annual Growth Rate (2018-2033)	 2.13%	0.56%	0.88%
Households	Annual Growth Rate (2010-2018)	 2.17%	0.53%	0.79%
	Average Household Size	2.66	2.52	2.59
Age Segment Distribution	Ages 0-17	26%	23%	22%
	Ages 18-34	 17%	23%	24%
	Ages 35-54	29%	25%	25%
	Ages 55-74	22%	23%	22%
	Ages 75+	5%	6%	7%
Race Distribution	White Alone	 81.7%	82.1%	69.9%
	Black Alone	 3.5%	9.5%	12.9%
	American Indian	0.2%	0.3%	1.0%
	Asian	 11.3%	2.4%	5.7%
	Pacific Islander	0.0%	0.0%	0.2%
	Some other Race	 0.8%	3.1%	6.9%
	Two or More Races	2.4%	2.5%	3.4%
Hispanic/Latino Population	Hispanic / Latino Origin (any race)	 3.1%	7.1%	18.3%
	All Others	 96.9%	92.9%	81.7%
Income Characteristics	Per Capita Income	 \$53,504	\$27,871	\$31,950
	Median Household Income	 \$110,799	\$53,531	\$58,100

Figure 27: Service Area's Demographic Comparative Summary Table

KEY DEMOGRAPHIC FINDINGS

- The City's **population annual growth rate** (2.00%) is significantly higher than both Indiana's (0.54%) and the U.S.'s (0.86%) growth rates.
- Carmel's **average household size** (2.66) is slightly larger than both state (2.52) and national (2.59) averages.
- When assessing **age segments**, the service area's 18-34 segment (17%) is noticeably lower than the national average (24%).
- The City's **racial distribution** has greater White Alone and Asian populations and slightly smaller Black Alone and Some Other Race populations, when compared to national percentage distribution.
- Carmel's percentage of **Hispanic/Latino population** (3.1%) is significantly lower than the national average (18.3%).
- The service area's **per capita income** (\$53,504) and **median house income** (\$110,799) are both significantly higher when compared to Indiana's (\$27,871 & \$53,531) and the U.S.'s (\$31,950 & \$58,100) income characteristics.



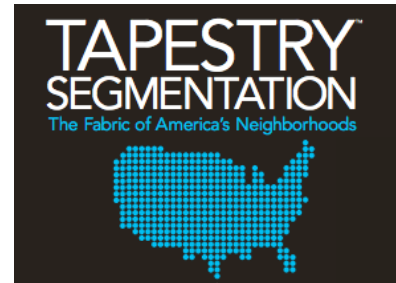
10.2.2 MARKET PROFILE

In addition to demographic characteristics, ESRI also provides a Market Profile which analysis key economic factors, including tapestry segmentation, educational attainment, unemployment rate, and percent of population with disabilities.

TAPESTRY SEGMENTATION

ESRI's Tapestry Segmentation is a geodemographic system that classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. This market segmentation tool integrates consumer traits with residential characteristics to identify individual markets within a specified area. The Tapestry provides a classification model with 67 distinct, behavioral market segments that depict consumers' lifestyles and lifestages, and detail the diversity of the American population.

These individual market segments are then arranged into 14 LifeMode groups that have similar characteristics and market profiles. A brief summary of the 14 LifeMode groups is provided in the table below. A complete listing of these groups' characteristics and the individual segments that comprise each LifeMode group is available in **Appendix B. (Source: ESRI)**



LifeMode Summary Groups	
Group Name	Brief Description
Affluent Estates	Established wealth- educated, well-traveled married couples
Upscale Avenues	Prosperous, married couples in higher density neighborhoods
Uptown Individuals	Younger, urban singles on the move
Family Landscapes	Successful younger families in newer housing
GenXurban	Gen X in middle age; families with fewer kids and a mortgage
Cozy Country Living	Empty nesters in bucolic settings
Ethnic Enclaves	Established diversity- young, Hispanic homeowners with families
Middle Ground	Lifestyles of thirtysomethings
Senior Styles	Senior lifestyles reveal the effects of saving for retirement
Rustic Outposts	Country life with older families, older homes
Midtown Singles	Millenials on the move; single, diverse, and urban
Hometown	Growing up and staying close to home; single householders
Next Wave	Urban denizens; young, diverse, hardworking families
Scholars and Patriots	College campuses and military neighborhoods

Figure 28: LifeMode Summary Groups

The ESRI Tapestry Segmentation provides an understanding of consumers' lifestyle choices, what they buy, and how they spend their free time for a specified service area. This information is useful in identifying target markets, as well as highlighting segments that are being underserved, to ensure that the City's offerings are in line with the unique characteristics and preferences of its users.

TOP 5 TAPESTRY SEGMENTS

This section reveals the top five Tapestry Segments and corresponding LifeMode Groups, expressed as percentage of households, for the City. Analyzing the dominant Tapestry Segmentation allows the Carmel to assess the market profile of its service area by examining the distribution of household types and summarizing the general characteristics and behaviors expected from each group.

For better context of how unique the City's households are compared to the rest of the country, the percentage of U.S. households for each Tapestry Segment are also provided for comparison.

Carmel Top 5 Tapestry Segments			
Tapestry Segments		% of Carmel Households	% of U.S. Households
1	Professional Pride Affluent Estates	33.1%	1.6%
2	Savvy Suburbanites Affluent Estates	15.2%	3.0%
3	In Style GenXurban	13.7%	2.2%
4	Boomburbs Affluent Estates	10.5%	1.7%
5	Old and Newcomers Middle Ground	8.7%	2.3%
Total Percentage of Population:		81.2%	10.8%

Figure 29: Top 5 Tapestry Segments

KEY TAPESTRY SEGMENT DESCRIPTIONS

Below are brief summaries of the characteristics and consumer behaviors for the most prevalent Tapestry Segments within the City.

PROFESSIONAL PRIDE (33.1% OF CITY HOUSEHOLDS)

- Families are mostly married couples (almost 80% of households), and more than half of these families have kids. Their average household size, 3.11, reflects the presence of children
- Most households own two or three vehicles; long commutes are the norm
- Median age is 40.5 with a median household income of \$127,000
- These residents are well-educated career professionals and are goal oriented
- Residents are well organized and routine is key to daily life

SAVVY SUBURBANITES (15.2% OF CITY HOUSEHOLDS)

- Residents are well educated, married couples who are mostly empty nesters (median age 44.1) in older neighborhoods outside the City
- Activities include remodeling, gardening, exercising and enjoy cultural events, food and wine
- Well-connected consumers that use technology for shopping, baking and staying up with current events
- Median household income of \$104,000 and home median value of \$311,000

IN STYLE (13.7% OF CITY HOUSEHOLDS)

- Interested in the arts, travel, and extensive reading

- Mostly married couples with no children or single households; average household size is 2.33
- The population is slightly older, with a median age of 41.1 and median household income of \$66,000
- Residents are college educated or have some college education - very connected and knowledgeable with technology
- They are aware of pricing, use coupons - especially mobile coupons

BOOMBURBS (10.5% OF CITY HOUSEHOLDS)

- Residents are well-educated professionals with a median age of 33.6 and median household income of \$105,000
- They are well connected and comfortable with the latest technology
- Primarily single-family homes in new neighborhoods
- Mostly young, married families with children; average household size is 3.22
- Unemployment is low and most households have more than two workers.

OLD AND NEWCOMERS (8.7% OF CITY HOUSEHOLDS)

- Mostly renters who are just beginning their careers or retiring
- Most residents are single households with a mix of married couples (no children)
- Median age is 38.5 with a median household income of \$39,000
- Consumers are price aware and coupon clippers but open to impulse buys
- They are attentive to environmental concerns and comfortable with the latest technology

EDUCATION

Based on the 2018 population, approximately 69.8% of Carmel's residents (25+ years old) have attained a Bachelors or Graduate Degree; which is more than double the national average (30.3%). While an estimated 2.1% of the population never attained a high school diploma.

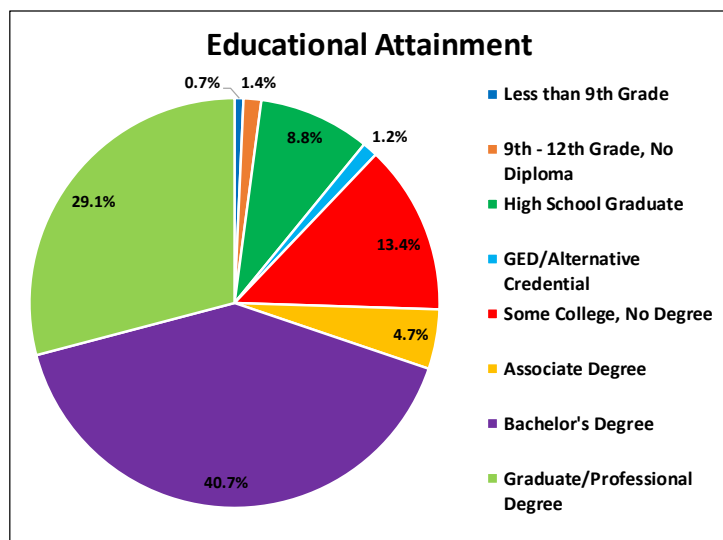


Figure 30: Educational Attainment

UNEMPLOYMENT

In assessing the civilian labor force (16+ years old), currently 97.8% of residents hold a full or part-time position, while the remaining 2.2% of the City's (civilian) population are deemed unemployed.

Note: The unemployment rate excludes individuals who are currently in institutions such as prisons, mental hospitals, or nursing homes.

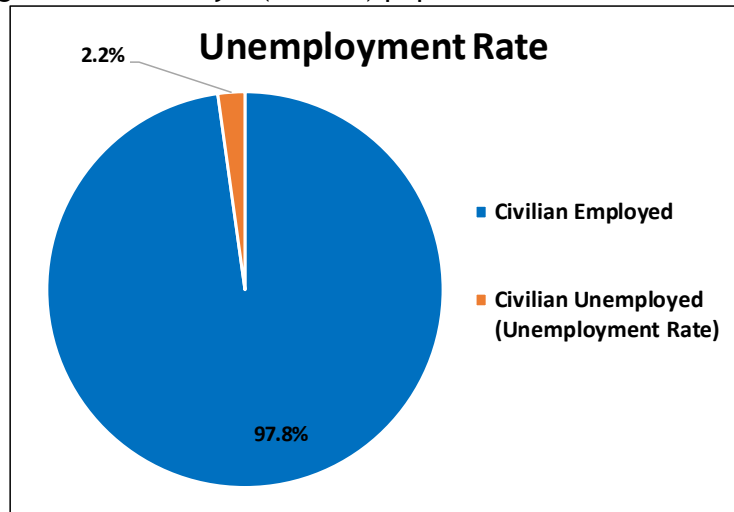


Figure 31: Unemployment Rate

DISABILITY

Based on a four-year trend (2012-2016) the percentage of Carmel's population that has been diagnosed with a disability has slightly decreased since 2012. As expected, the 65+ population is at significantly greater risk of being diagnosed with a disability. Approximately 1/4 of all residents over the age of 64 has either a physical or mental disability.

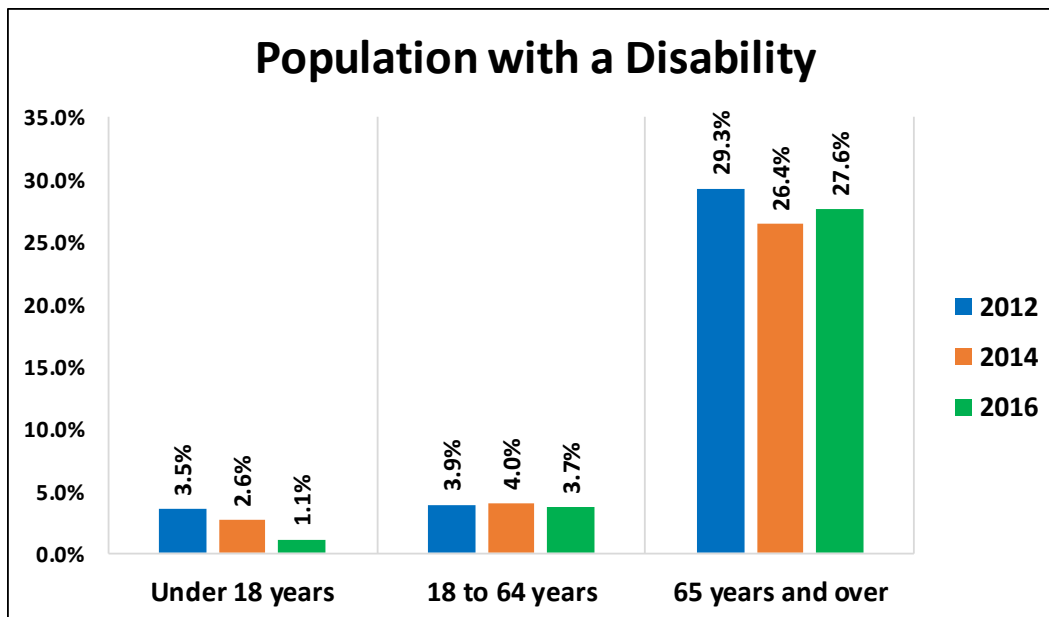


Figure 32: Percent of Carmel's Population with a Disability

10.2.3 RECREATION TRENDS ANALYSIS

The Trends Analysis provides an understanding of national, regional, and local recreational trends. This analysis examines participation trends, activity levels, and programming trends. It is important to note that all trends are based on current and/or historical patterns and participation rates.

NATIONAL TRENDS IN RECREATION

METHODOLOGY

The Sports & Fitness Industry Association's (SFIA) *Sports, Fitness & Recreational Activities Topline Participation Report 2018* was utilized in evaluating the following trends:



- National Trends in Sport and Fitness Participation
- Core vs. Casual Participation
- Activity by Generation

The study is based on findings from surveys carried out in 2017 and the beginning of 2018 by the Physical Activity Council, resulting in a total of 30,999 online interviews (individual and household surveys). A sample size of 30,999 completed interviews is considered by SFIA to result in a high degree of statistical accuracy. A sport with a participation rate of five percent has a confidence interval of +/- 0.27 percentage points at a 95% confidence interval. Using a weighting technique, survey results are applied to the total U.S. population figure of 298,325,103 people (ages six and older). The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S.

CORE VS. CASUAL PARTICIPATION

In addition to overall participation rates, SFIA further categorizes active participants as either core or casual participants based on frequency. Core participants have higher participatory frequency than casual participants. The thresholds that define casual versus core participation may vary based on the nature of each individual activity. For instance, core participants engage in most fitness and recreational activities more than 50 times per year, while for sports, the threshold for core participation is typically 13 times per year. In a given activity, core participants are more committed and tend to be less likely to switch to other activities or become inactive (engage in no physical activity) than casual participants. This may also explain why activities with more core participants tend to experience less pattern shifts in participation rates than those with larger groups of casual participants.

In recent years, the percent of core participants has decreased in nearly every sport/activity as casual participation continues to become more common among today's generation. This is expected to be a result of several factors including time restraints, financial barriers, and the introduction of new activities. All of these factors are contributing to participants trying out new activities and casually participating in a wide variety of sports and recreation endeavors versus the former trend of dedicating all of one's time and finance to one (or two) activities.

INACTIVITY RATES / ACTIVITY LEVEL TRENDS

SFIA also categorizes participation rates by intensity, dividing activity levels into five categories based on the caloric implication (i.e., high calorie burning, low/med calorie burning, or inactive) and the frequency of participation (i.e., 1-50 times, 50-150 times, or above) for a given activity. Participation rates are expressed as 'super active' or 'active to a healthy level' (high calorie burning, 151+ times), 'active' (high calorie burning, 50-150 times), 'casual' (high calorie burning, 1-50 times), 'low/med calorie burning', and 'inactive'. These participation rates are then assessed based on the total population trend over the last five years, as well as breaking down these rates by generation.

NATIONAL SPORT AND FITNESS PARTICIPATORY TRENDS

NATIONAL TRENDS IN GENERAL SPORTS

The sports most heavily participated in the United States were Golf (23.8 million in 2016) and Basketball (23.4 million), which have participation figures well in excess of the other activities within the general sports category. The popularity of Golf and Basketball can be attributed to the ability to compete with relatively small number of participants. Even though Golf has experienced a recent decrease in participation, it still continues to benefit from its wide age segment appeal and is considered a life-long sport. Basketball's success can be attributed to the limited amount of equipment needed to participate and the limited space requirements necessary, which make basketball the only traditional sport that can be played at the majority of American dwellings as a drive-way pickup game.

Since 2012, Rugby and other niche sports, like Boxing, Lacrosse, and Roller Hockey have seen strong growth. Rugby has emerged as the overall fastest growing sport, as it has seen participation levels rise by 82.8% over the last five years. Based on the five-year trend, Boxing for Competition (42.6%), Lacrosse (35.1%), and Roller Hockey (34.2%) have also experienced significant growth. In the most recent year, the fastest growing sports were Boxing for Competition (13.1%) and Pickleball (11.3%).



During the last five years, the sports that are most rapidly declining include Ultimate Frisbee (-39.1%), Touch Football (-22.8%), Tackle Football (-16.0%), and Racquetball (-13.4%). For the most recent year, Ultimate Frisbee (-14.9%), Badminton (-12.6%), Gymnastics (-10.7%), and Volleyball-Sand/Beach (-9.9%) experienced the largest declines.

In general, the most recent year shares a similar pattern with the five-year trends. This suggests that the increasing participation rates in certain activities have yet to peak in sports like Rugby, Lacrosse, Field Hockey, and Competitive Boxing. However, some sports that increased rapidly over the past five years have experienced recent decreases in participation, including Squash, Ice Hockey, Roller Hockey and Volleyball-Sand/Beach. The reversal of the five-year trends in these sports may be due to a relatively low user base (ranging from 1-5 million) and could suggest that participation in these activities may have peaked.

CORE VS. CASUAL TRENDS IN GENERAL SPORTS

The most popular sports, such as Basketball and Baseball, have a larger core participant base (engaged 13+ times annually) than casual participant base (engaged at least 1 time annually). Less mainstream, less organized sports such as Ultimate Frisbee, Roller Hockey, Squash, and Boxing for Competition have larger casual participation. Although these sports increased in participation over the last five years, the newcomers were mostly casual participants that may be more inclined to switch to other sports or fitness activities, resulting in the declining one-year trends.

National Participatory Trends - General Sports					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Golf * (2011, 2015, and 2016 data)	25,682	24,120	23,815	-7.3%	-1.3%
Basketball	23,708	22,343	23,401	-1.3%	4.7%
Tennis	17,020	18,079	17,683	3.9%	-2.2%
Baseball	12,976	14,760	15,642	20.5%	6.0%
Soccer (Outdoor)	12,944	11,932	11,924	-7.9%	-0.1%
Softball (Slow Pitch)	7,411	7,690	7,283	-1.7%	-5.3%
Football, Flag	5,865	6,173	6,551	11.7%	6.1%
Badminton	7,278	7,354	6,430	-11.7%	-12.6%
Volleyball (Court)	6,384	6,216	6,317	-1.0%	1.6%
Football, Touch	7,295	5,686	5,629	-22.8%	-1.0%
Soccer (Indoor)	4,617	5,117	5,399	16.9%	5.5%
Football, Tackle	6,220	5,481	5,224	-16.0%	-4.7%
Volleyball (Sand/Beach)	4,505	5,489	4,947	9.8%	-9.9%
Gymnastics	5,115	5,381	4,805	-6.1%	-10.7%
Track and Field	4,257	4,116	4,161	-2.3%	1.1%
Cheerleading	3,244	4,029	3,816	17.6%	-5.3%
Racquetball	4,070	3,579	3,526	-13.4%	-1.5%
Pickleball	N/A	2,815	3,132	N/A	11.3%
Ultimate Frisbee	5,131	3,673	3,126	-39.1%	-14.9%
Ice Hockey	2,363	2,697	2,544	7.7%	-5.7%
Softball (Fast Pitch)	2,624	2,467	2,309	-12.0%	-6.4%
Lacrosse	1,607	2,090	2,171	35.1%	3.9%
Wrestling	1,922	1,922	1,896	-1.4%	-1.4%
Roller Hockey	1,367	1,929	1,834	34.2%	-4.9%
Rugby	887	1,550	1,621	82.8%	4.6%
Field Hockey	1,237	1,512	1,596	29.0%	5.6%
Squash	1,290	1,549	1,492	15.7%	-3.7%
Boxing for Competition	959	1,210	1,368	42.6%	13.1%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

*2017 information not available for **Golf**. Information to be released by National Golf Foundation. Participation figures above reflect 2011, 2015, and 2016 data.

Figure 33: General Sports Participatory Trends (SFIA)

NATIONAL TRENDS IN GENERAL FITNESS

Overall, national participatory trends in fitness have experienced strong growth in recent years. Many of these activities have become popular due to an increased interest among Americans to improve their health and enhance quality of life by engaging in an active lifestyle. These activities also have very few barriers to entry, which provides a variety of options that are relatively inexpensive to participate in and can be performed by most individuals.

The most popular fitness activity, by far, is Fitness Walking, which had about 110.8 million participants in 2017, increasing 2.7% from the previous year. Other leading fitness activities based on total number of participants include Treadmill (52.9 million), Free Weights (52.2 million), Running/Jogging (50.7 million), Weight/Resistance Machines (36.2 million), and Stationary Cycling (36.0 million).



Over the last five years, the activities growing most rapidly are Non-Traditional / Off-Road Triathlons (74.7%), Trail Running (57.6%), and Aerobics (32.7%). Over the same time frame, the activities that have undergone the most decline include: Boot Camps Style Cross Training (-11.3%), Stretching (-7.5%), and Weight/Resistance Machines (-6.9%).

In the last year, activities with the largest gains in participation were Triathlon Non-Traditional/Off Road (10.1%), Running/Jogging (7.1%), and Trail Running (6.6%). From 2016-2017, the activities that had the most decline in participation were Traditional/Road Triathlon (-8.9%), Cardio Kickboxing (-3.0%), and Calisthenics/Bodyweight Exercise (-2.6%).

CORE VS. CASUAL TRENDS IN GENERAL FITNESS

It should be noted that many of the activities that are rapidly growing have a relatively low user base, which allows for more drastic shifts in terms of percentage, especially for five-year trends. Increasing casual participants may also explain the rapid growth in some activities. For instance, core/casual participation trends showed that over the last five years, casual participants increased drastically in Non-Traditional/ Off Road (119.6%) and Tai Chi (26.9%), while the core participant base of both activities experienced significantly less growth.

National Participatory Trends - General Fitness					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Fitness Walking	114,029	107,895	110,805	-2.8%	2.7%
Treadmill	50,839	51,872	52,966	4.2%	2.1%
Free Weights (Dumbbells/Hand Weights)	N/A	51,513	52,217	N/A	1.4%
Running/Jogging	51,450	47,384	50,770	-1.3%	7.1%
Weight/Resistant Machines	38,999	35,768	36,291	-6.9%	1.5%
Stationary Cycling (Recumbent/Upright)	35,987	36,118	36,035	0.1%	-0.2%
Stretching	35,873	33,771	33,195	-7.5%	-1.7%
Elliptical Motion Trainer*	28,560	32,218	32,283	13.0%	0.2%
Free Weights (Barbells)	26,688	26,473	27,444	2.8%	3.7%
Yoga	23,253	26,268	27,354	17.6%	4.1%
Calisthenics/Bodyweight Exercise	N/A	25,110	24,454	N/A	-2.6%
Choreographed Exercise	N/A	21,839	22,616	N/A	3.6%
Aerobics (High Impact)	16,178	21,390	21,476	32.7%	0.4%
Stair Climbing Machine	12,979	15,079	14,948	15.2%	-0.9%
Cross-Training Style Workout	N/A	12,914	13,622	N/A	5.5%
Stationary Cycling (Group)	8,477	8,937	9,409	11.0%	5.3%
Trail Running	5,806	8,582	9,149	57.6%	6.6%
Pilates Training	8,519	8,893	9,047	6.2%	1.7%
Cardio Kickboxing	6,725	6,899	6,693	-0.5%	-3.0%
Boot Camp Style Cross-Training	7,496	6,583	6,651	-11.3%	1.0%
Martial Arts	5,075	5,745	5,838	15.0%	1.6%
Boxing for Fitness	4,831	5,175	5,157	6.7%	-0.3%
Tai Chi	3,203	3,706	3,787	18.2%	2.2%
Barre	N/A	3,329	3,436	N/A	3.2%
Triathlon (Traditional/Road)	1,789	2,374	2,162	20.8%	-8.9%
Triathlon (Non-Traditional/Off Road)	1,075	1,705	1,878	74.7%	10.1%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

*Cardio Cross Trainer is merged to Elliptical Motion Trainer

Figure 34: General Fitness National Participatory Trends (SFIA)

NATIONAL TRENDS IN OUTDOOR RECREATION

Results from the SFIA report demonstrate a contrast of growth and decline in participation regarding outdoor / adventure recreation activities. Much like the general fitness activities, these activities encourage an active lifestyle, can be performed individually or within a group, and are not as limited by time constraints.

In 2017, the most popular activities, in terms of total participants, from the outdoor / adventure recreation category include: Day Hiking (44.9 million), Road Bicycling (38.8 million), Freshwater Fishing (38.3 million), and Camping within ¼ mile of Vehicle/Home (26.2 million).

From 2012-2017, BMX Bicycling (83.4%), Adventure Racing (56.3%), Backpacking Overnight (38.3%), and Day Hiking (30.1%) have undergone the largest increases in participation. Similarly, in the last year, activities growing most rapidly include: BMX Bicycling (10.0%), Backpacking Overnight (8.1%), and Day Hiking (6.6%).

The five-year trend shows activities declining most rapidly were In-Line Roller Skating (-20.7%), Camping within ¼ mile of Home/Vehicle (-16.5%), and Birdwatching (-9.2%). More recently, activities experiencing the largest declines were Adventure Racing (-15.7%), Traditional Climbing (-9.4%), and In-Line Roller Skating (-2.1%).

CORE VS. CASUAL TRENDS IN OUTDOOR RECREATION

National participation trends for outdoor activities is on the rise; however, In-Line Roller Skating and Freshwater Fishing only experienced increases in *casual* participation over the last five years. Any decline in participation over the last five years was mainly ascribed to decreases in core participants for activities such as In-Line Roller Skating (-32.6%), Skateboarding (-10.7%), Road Bicycling (-10.4%), Camping Recreational Vehicle (-10.0%), and Archery (-3.2%).



National Participatory Trends - Outdoor / Adventure Recreation					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Hiking (Day)	34,519	42,128	44,900	30.1%	6.6%
Bicycling (Road)	39,790	38,365	38,866	-2.3%	1.3%
Fishing (Freshwater)	39,002	38,121	38,346	-1.7%	0.6%
Camping (< 1/4 Mile of Vehicle/Home)	31,454	26,467	26,262	-16.5%	-0.8%
Camping (Recreational Vehicle)	15,903	15,855	16,159	1.6%	1.9%
Fishing (Saltwater)	12,000	12,266	13,062	8.9%	6.5%
Birdwatching (>1/4 mile of Vehicle/Home)	13,535	11,589	12,296	-9.2%	6.1%
Backpacking Overnight	7,933	10,151	10,975	38.3%	8.1%
Bicycling (Mountain)	7,265	8,615	8,609	18.5%	-0.1%
Archery	7,173	7,903	7,769	8.3%	-1.7%
Fishing (Fly)	5,848	6,456	6,791	16.1%	5.2%
Skateboarding	6,227	6,442	6,382	2.5%	-0.9%
Roller Skating, In-Line	6,647	5,381	5,268	-20.7%	-2.1%
Bicycling (BMX)	1,861	3,104	3,413	83.4%	10.0%
Adventure Racing	1,618	2,999	2,529	56.3%	-15.7%
Climbing (Traditional/Ice/Mountaineering)	2,189	2,790	2,527	15.4%	-9.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend: <div> <div>Large Increase (greater than 25%)</div> <div>Moderate Increase (0% to 25%)</div> <div>Moderate Decrease (0% to -25%)</div> <div>Large Decrease (less than -25%)</div> </div>					

Figure 35: Outdoor / Adventure Recreation Participatory Trends (SFIA)

NATIONAL TRENDS IN AQUATIC ACTIVITY

Swimming is unquestionably a lifetime sport, which is most likely why it has experienced such strong participation growth among the American population. In 2017, Fitness Swimming is the absolute leader in overall participation (27.1 million) for aquatic activities, due in large part to its broad, multigenerational appeal. In the most recent year, Fitness Swimming reported the strongest growth (2.0%) among aquatic activities, while Aquatic Exercise and Competitive Swimming experienced decreases in participation.



Aquatic Exercise has had a strong participation base of 10.4 million, however it also has recently experienced a slight decrease in participants (-1.1%). Based on previous trends, this activity could rebound in terms of participation due largely to ongoing research that demonstrates the activity's great therapeutic benefit coupled with increased life expectancies and a booming senior population. Aquatic Exercise has paved the way as a less stressful form of physical activity, while allowing similar benefits as land-based exercises, such as aerobic fitness, resistance training, flexibility, and balance. Doctors are still recommending Aquatic Exercise for injury rehabilitation, mature patients, and patients with bone or joint problems. Compared to a standard workout, Aquatic Exercise can significantly reduce stress placed on weight-bearing joints, bones, and muscles, while also reducing swelling.

National Participatory Trends - Aquatics					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Swimming (Fitness)	23,216	26,601	27,135	16.9%	2.0%
Aquatic Exercise	9,177	10,575	10,459	14.0%	-1.1%
Swimming (Competition)	2,502	3,369	3,007	20.2%	-10.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 36: Aquatic Participatory Trends (SFIA)

CORE VS. CASUAL TRENDS IN AQUATIC ACTIVITY

While all activities have undergone increases in participation over the last five years, most recently, casual participation (1-49 times) is increasing much more rapidly than core participation (50+ times). For the five-year timeframe, casual participants of Competition Swimming increased by 56.2%, Aquatic Exercise by 24.8%, and Fitness Swimming by 21.0%. However, core participants of Competition Swimming decreased by -6.5% and Aquatic Exercise declined by -4.6% (from 2012 to 2017).

NATIONAL TRENDS IN WATER SPORTS / ACTIVITIES

The most popular water sports / activities based on total participants in 2017 were Recreational Kayaking (10.5 million), Canoeing (9.2 million), and Snorkeling (8.3 million). It should be noted that water activity participation tends to vary based on regional, seasonal, and environmental factors. A region with more water access and a warmer climate is more likely to have a higher participation rate in water activities than a region that has long winter seasons or limited water access. Therefore, when assessing trends in water sports and activities, it is important to understand that fluctuations may be the result of environmental barriers which can greatly influence water activity participation.

Over the last five years, Stand-Up Paddling (138.9%) was by far the fastest growing water activity, followed by White Water Kayaking (33.1%), Recreational Kayaking (28.7%), and Sea/Tour Kayaking (20.8%). Although the five-year trends show water sport activities are getting more popular, the most recent year shows a different trend. From 2016-2017 Stand-Up Paddling Recreational Kayaking reflect much slower increases in participation (3.3% and 5.2%), while White Water Kayaking (-2.0%), Sea/Tour Kayaking (-5.4%) both show decreases in participation numbers.

From 2012-2017, activities declining most rapidly were Jet Skiing (-22.6%), Water Skiing (-19.4%), and Wakeboarding (-10.8%). In the most recent year, activities experiencing the greatest declines in participation included: Boardsailing/Windsurfing (-9.4%), Canoeing (-8.2%), and Scuba Diving (-7.6%).

National Participatory Trends - Water Sports / Activities					
Activity	Participation Levels			% Change	
	2012	2016	2017	5-Year Trend	1-Year Trend
Kayaking (Recreational)	8,187	10,017	10,533	28.7%	5.2%
Canoeing	9,813	10,046	9,220	-6.0%	-8.2%
Snorkeling	8,664	8,717	8,384	-3.2%	-3.8%
Jet Skiing	6,996	5,783	5,418	-22.6%	-6.3%
Sailing	3,841	4,095	3,974	3.5%	-3.0%
Water Skiing	4,434	3,700	3,572	-19.4%	-3.5%
Rafting	3,756	3,428	3,479	-7.4%	1.5%
Stand-Up Paddling	1,392	3,220	3,325	138.9%	3.3%
Wakeboarding	3,368	2,912	3,005	-10.8%	3.2%
Kayaking (Sea/Touring)	2,446	3,124	2,955	20.8%	-5.4%
Scuba Diving	2,781	3,111	2,874	3.3%	-7.6%
Surfing	2,545	2,793	2,680	5.3%	-4.0%
Kayaking (White Water)	1,878	2,552	2,500	33.1%	-2.0%
Boardsailing/Windsurfing	1,372	1,737	1,573	14.7%	-9.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over					
Legend:	Large Increase (greater than 25%)	Moderate Increase (0% to 25%)	Moderate Decrease (0% to -25%)	Large Decrease (less than -25%)	

Figure 37: Water Sports / Activities Participatory Trends (SFIA)

CORE VS. CASUAL TRENDS IN WATER SPORTS / ACTIVITIES

As mentioned previously, regional, seasonal, and environmental limiting factors may influence the participation rate of water sport and activities. These factors may also explain why all water-based activities have more casual participants than core participants, since frequencies of activities may be constrained by uncontrollable factors.

ACTIVITY BY GENERATION

Analyzing participation by age for recreational activities reveals that fitness and outdoor sports were the most common activities across all generations. Breaking down activity level by generation shows a converse correlation between age and healthy activity rates.

Generation Z (born 2000+) were the most active, with only 17.6% identifying as inactive. Approximately 65% of individuals within this generation were active in 2017; with 26.3% being active to a healthy level, 18.5% being active & high calorie, and 20.1% being casual active & low/med calorie.

Almost half (46.7%) of **millennials (born 1980-1999)** were active to a healthy level (35.4%) or active & high calorie (11.3%), while 24.0% claimed they were inactive. Even though this inactive rate is much higher than Generation Z's (17.6%), it is still below the national inactive rate.

Generation X (born 1965-1979) has the second highest active to a healthy level rate (35.0%) among all generations, only being 0.4% less than Millennials. At the same time, they also have the second highest inactive rate, with 28.1% not active at all.

The Boomers (born 1945-1964) were the least active generation, with an inactive rate of 33.3%. This age group tends to participate in less intensive activities. Approximately 34% claimed to engage in casual & low/med calorie (4.3%) or low/med calorie (29.6%) burning activities.

2017 PARTICIPATION RATES BY GENERATION

US population, Ages 6+

■ Active to a Healthy Level
 ■ Active & High Calorie
 ■ Casual & Low/Med Calorie
 ■ Low/Med Calorie
 ■ Inactive

*Times per year: Casual (1-50), Active (51-150), Active to Healthy Level (151+)

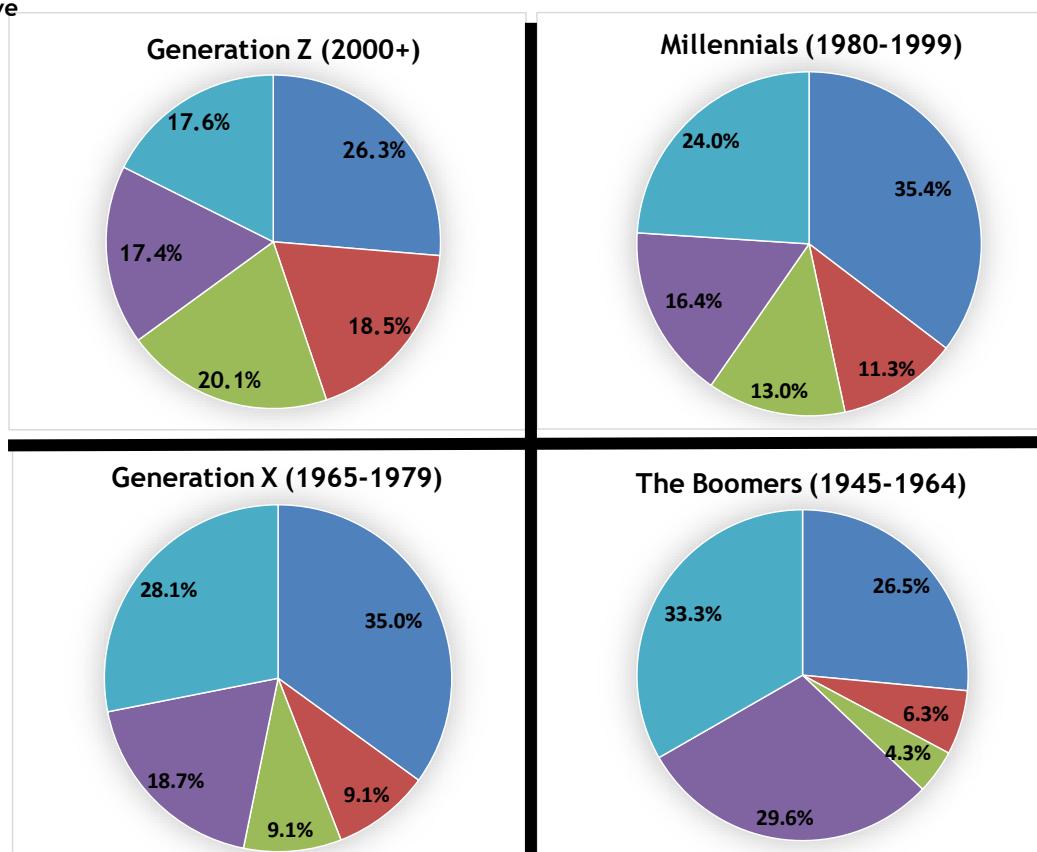


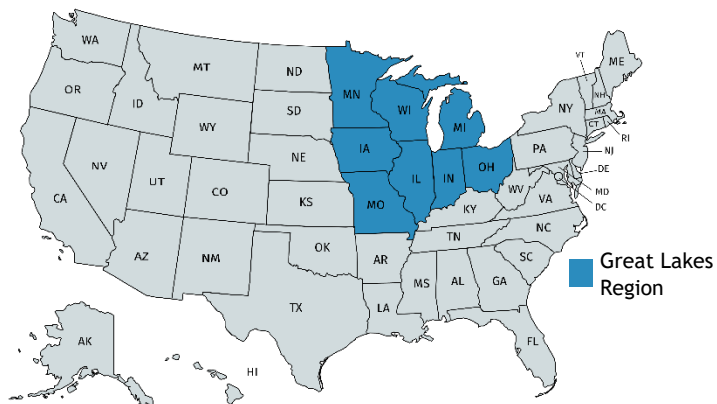
Figure 38: 2017 Participation Rates by Generation (SFIA)

NATIONAL AND REGIONAL PROGRAMMING TRENDS

PROGRAMS OFFERED BY PARK AND RECREATION AGENCIES (GREAT LAKES REGION)

NRPA's *Agency Performance Review 2018* summarize key findings from NRPA Park Metrics, which is a benchmark tool that compares the management and planning of operating resources and capital facilities of park and recreation agencies. The report contains data from 1,069 park and recreation agencies across the U.S. as reported between 2015 and 2017.

The report shows that the typical agencies (i.e., those at the median values) offer 161 programs annually, with roughly 60% of those programs being fee-based activities/events.



According to the information reported to the NRPA, the top five programming activities most frequently offered by park and recreation agencies, both in the U.S. and regionally, are described in **Figure 39**. A complete comparison of regional and national programs offered by agencies can be found in **Figure 40**.

When comparing Great Lakes agencies to the U.S. average, team sports, themed special events, fitness enhancement classes, and health and wellness education were all identified as top five most commonly provided program areas offered regionally and nationally.

Top 5 Most Offered Program Area and Category (Offered by Parks and Recreation Agencies)	
U.S. (% of agencies offering)	Great Lakes Region (% of agencies offering)
• Team sports (86%)	• Themed special events (84%)
• Themed special events (84%)	• Team sports (81%)
• Social recreation events (81%)	• Social recreation events (81%)
• Fitness enhancement classes (78%)	• Health and wellness education (78%)
• Health and wellness education (78%)	• Fitness enhancement classes 76%

Figure 39: Top 5 Program Areas and Categories (NRPA)

In general, Great Lakes park and recreation agencies offered programs at a very similar rate as the national average. However, based on a discrepancy threshold of 5% or more, Great Lakes agencies are offering natural and cultural history activities at a higher rate than the national average. Contradictory, the Great Lakes Region is trailing the national average in regards to team sports.

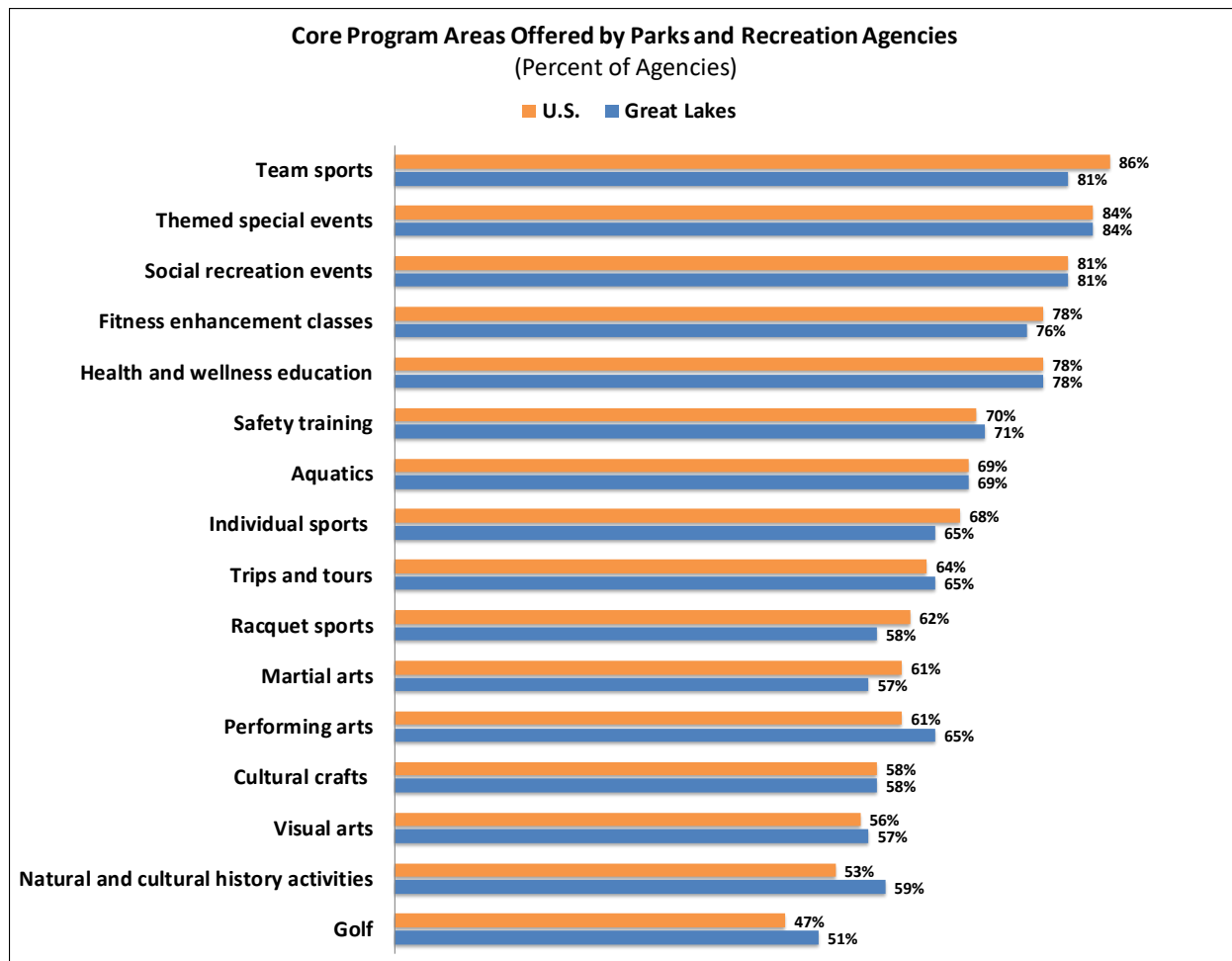


Figure 40: Programs Offered by Parks and Recreation Agency (NRPA)

TARGETED PROGRAMS FOR CHILDREN, SENIORS, AND PEOPLE WITH DISABILITIES

For better understanding of targeted programs by age segment, the NRPA also tracks program offerings that cater specifically to children, seniors, and people with disabilities, on a national and regional basis. This allows for further analysis of these commonly targeted populations. According to the 2018 NRPA Agency Performance Review, approximately 79% of agencies offer dedicated senior programming, while 62% of park and recreation agencies provide adaptive programming for individuals with disabilities.

Based on information reported to the NRPA, the top three activities that target children, seniors, and/or people with disabilities most frequently offered by park and recreation agencies are described in **Figure 41**. A complete comparison of regional and national programs offered by agencies can be found in **Figure 42**.

Top 3 Most Offered Program Area and Category (Targeting Children, Seniors, and/or People with Disabilities)	
U.S. (% of agencies offering)	Great Lakes Region (% of agencies offering)
<ul style="list-style-type: none"> Summer camp (84%) 	<ul style="list-style-type: none"> Summer camp (84%)
<ul style="list-style-type: none"> Senior programs (79%) 	<ul style="list-style-type: none"> Senior programs 79%)
<ul style="list-style-type: none"> Teen programs (63%) 	<ul style="list-style-type: none"> Teen programs (63%)

Figure 41: Top 3 Core Target Program Areas (NRPA)

Agencies in the Great Lakes tend to offer targeted programs at an almost identical rate as the national average. The only significant discrepancy is when it comes to preschool and before school program, which the Great Lakes Region offers at a higher rate than the national average.

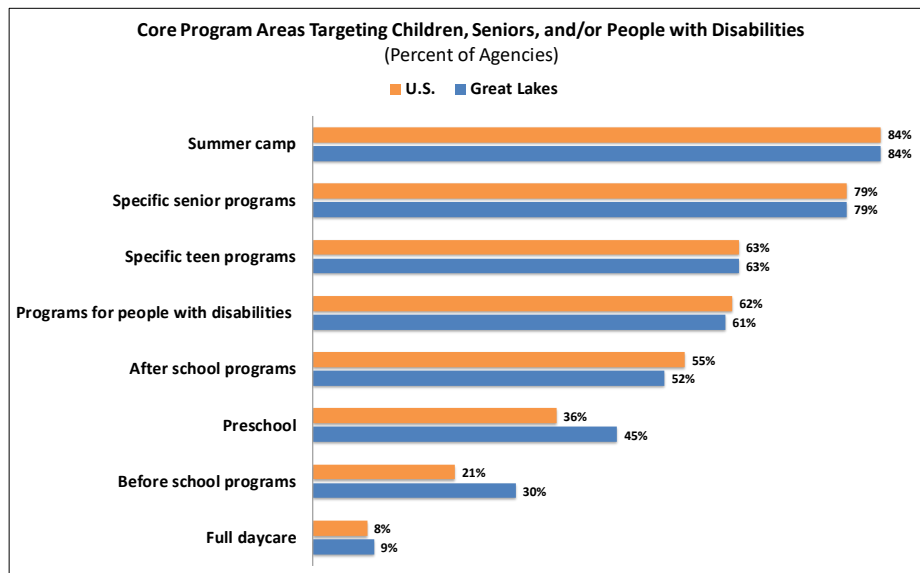


Figure 42: Targeted Programs for Children, Seniors, and People with Disabilities (NRPA)

LOCAL SPORT AND LEISURE MARKET POTENTIAL

MARKET POTENTIAL INDEX (MPI)

The following charts show sport and leisure market potential data for the City's service area, as provided by ESRI. A Market Potential Index (MPI) measures the probable demand for a product or service within the City. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the U.S. national average. The national average is 100; therefore, numbers below 100 would represent lower than average participation rates, and numbers above 100 would represent higher than average participation rates. The service area is compared to the national average in four (4) categories - general sports, fitness, outdoor activity, and commercial recreation.

Overall, the City demonstrates extremely high market potential index (MPI) numbers, this is particularly noticeable when analyzing the fitness and commercial recreation market potential charts. Every activity within both of these categories has an above average MPI score (100+). Analyzing the general sports and outdoor activity MPI charts, a majority of these activities score well above the national average, with only softball (96 MPI), Volleyball (95 MPI), and Horseback Riding (93 MPI) scoring below 100.

These overall high MPI scores show that Carmel residents are very active and have a rather strong participation presence when it comes to recreational activities. This becomes significant when the City considers starting up new programs or building new facilities, giving them a strong tool to estimate resident attendance and participation.

As seen in the charts below, the following sport and leisure trends are most prevalent for residents within the City. The activities are listed in descending order, from highest to lowest MPI score. High index numbers (100+) are significant because they demonstrate that there is a greater potential that residents within the service area will actively participate in offerings provided by Carmel Clay Parks & Recreation Department.

GENERAL SPORTS MARKET POTENTIAL

When analyzing the general sports MPI chart, golf (161 MPI), tennis (138 MPI), and football (112 MPI) are the most popular sports amongst City residents when compared to the national average.

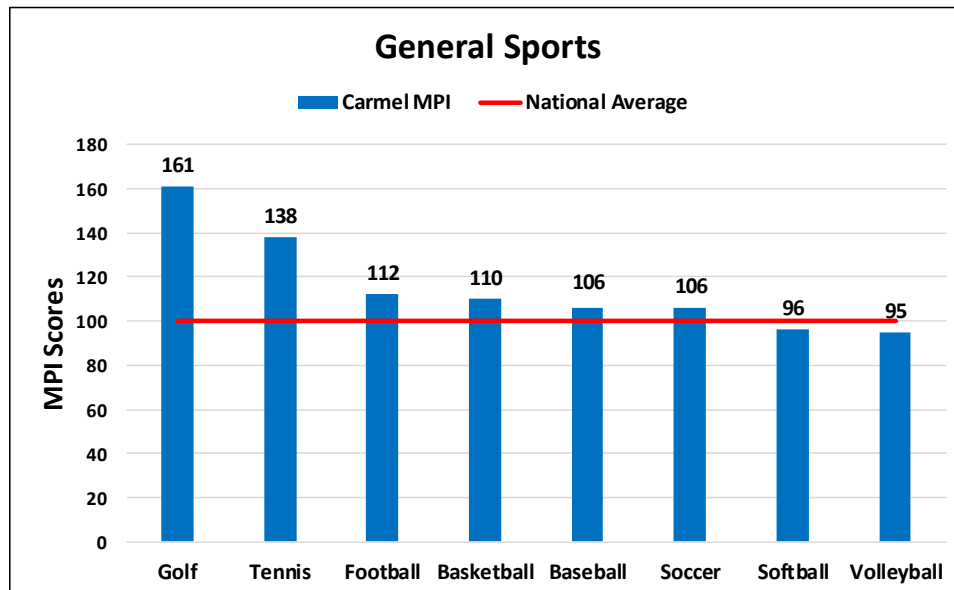


Figure 43: General Sports Participation Trends

FITNESS MARKET POTENTIAL

The fitness MPI chart shows weight lifting (147 MPI), jogging/running (143 MPI), and yoga (136 MPI) as the most popular activities amongst Carmel residents when compared to the national average.

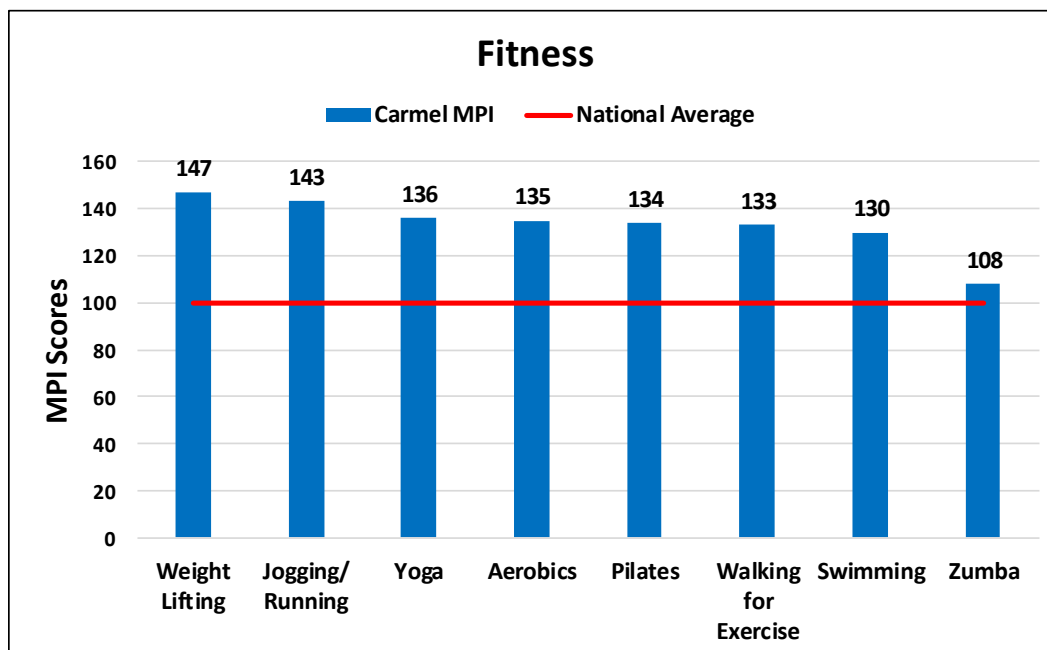


Figure 44: Fitness Participation Trends

OUTDOOR ACTIVITY MARKET POTENTIAL

When analyzing the outdoor activity MPI chart, hiking (143 MPI), mountain biking (141 MPI), bicycling (140 MPI), and canoeing/kayaking (140 MPI) are the most popular activities amongst City residents when compared to the national average.

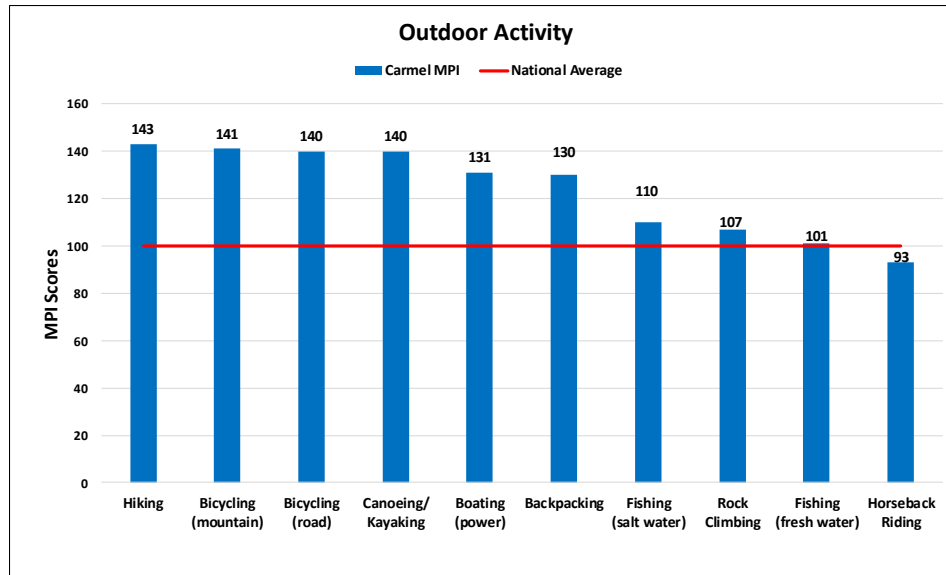


Figure 45: Outdoor Activity Participation Trends

COMMERCIAL RECREATION MARKET POTENTIAL

The commercial recreation MPI chart shows attended a sports event (148 MPI), spent \$250+ on sports/rec equipment (139 MPI), and went to a museum (133 MPI) as the most popular activities amongst Carmel residents when compared to the national average.

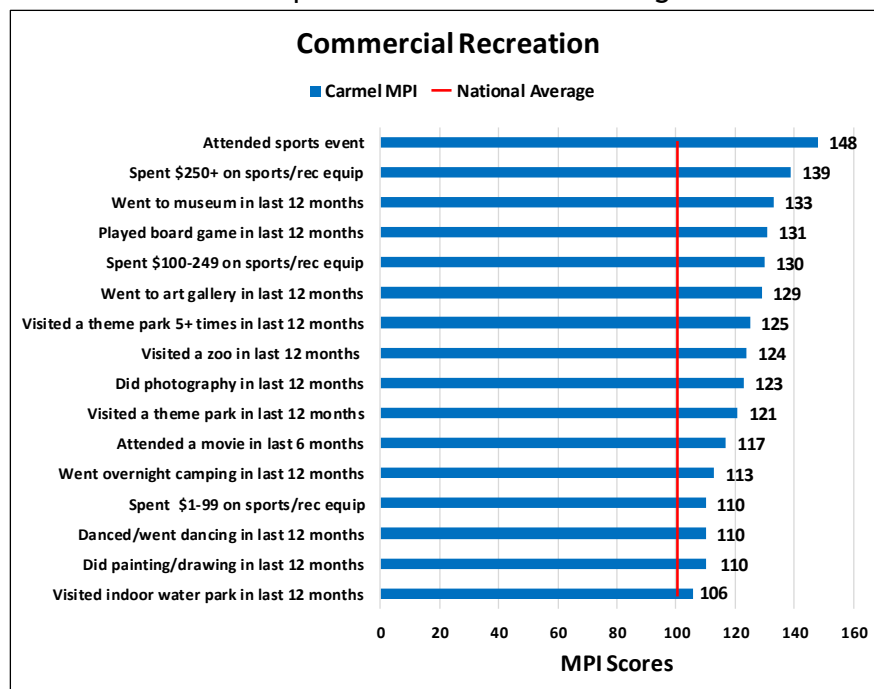


Figure 46: Commercial Recreation Participation Trends

EXPECTED LOCAL PARTICIPATION

The following chart shows the expected percentage of resident participants for the City in regards to recreational activities. These percentages are correlated to MPI scores previously introduced, serving as an additional tool for programmatic decision-making that allows Carmel Clay Parks & Recreation to quantify the expected participants by activity.

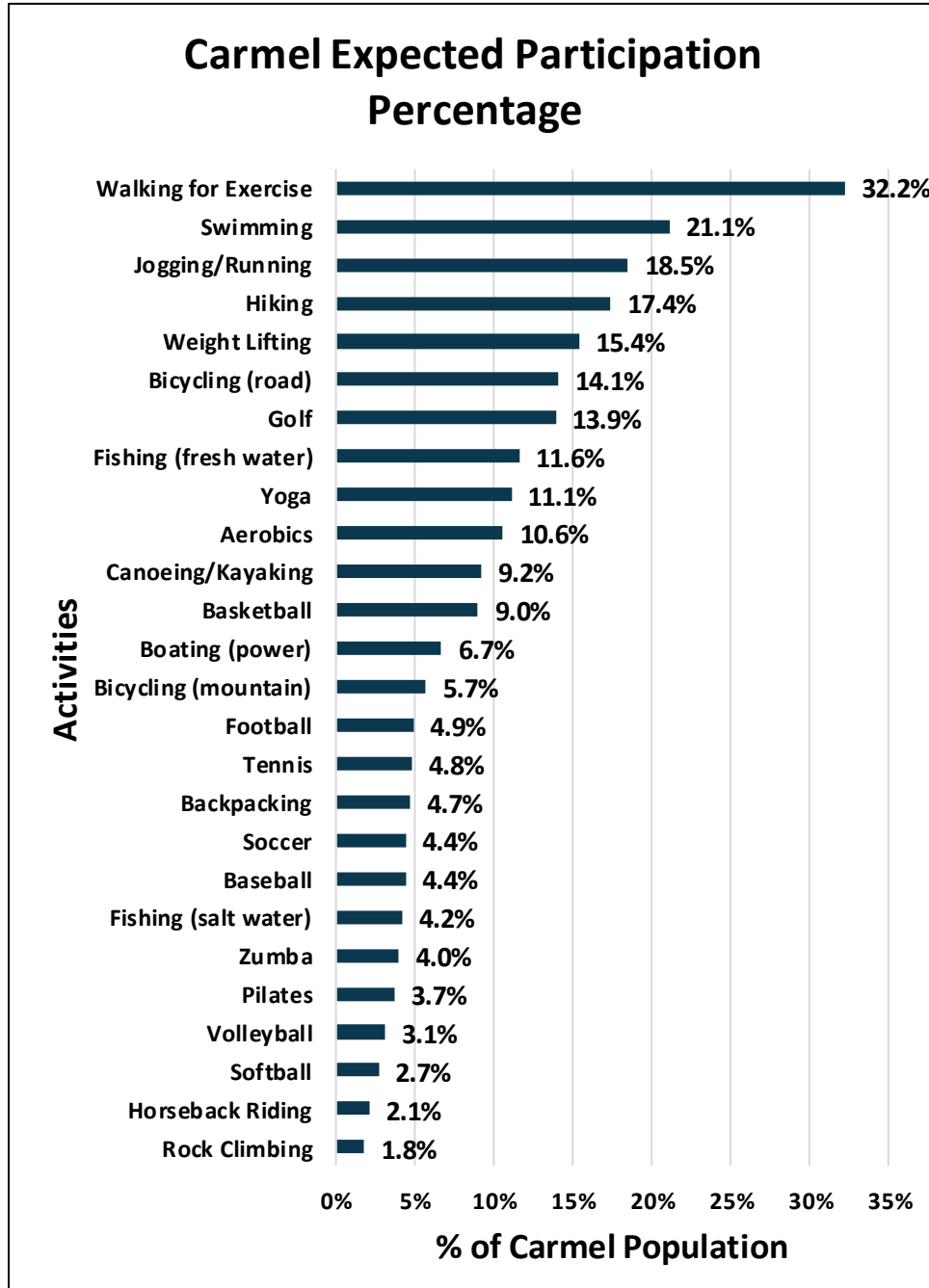


Figure 47: Expected Participation Percentage

10.2.4 CORE VS. CASUAL PARTICIPATION TRENDS

GENERAL SPORTS

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Golf * (2011, 2015 and 2016 data)	25,682	100%	24,120	100%	23,815	100%	-7.3%	-1.3%
Basketball	23,708	100%	22,343	100%	23,401	100%	-1.3%	4.7%
<i>Casual (1-12 times)</i>	7,389	31%	7,486	34%	8,546	37%	15.7%	14.2%
<i>Core(13+ times)</i>	16,319	69%	14,857	66%	14,856	63%	-9.0%	0.0%
Tennis	17,020	100%	18,079	100%	17,683	100%	3.9%	-2.2%
Baseball	12,976	100%	14,760	100%	15,642	100%	20.5%	6.0%
<i>Casual (1-12 times)</i>	3,931	30%	5,673	38%	6,405	41%	62.9%	12.9%
<i>Core (13+ times)</i>	9,046	70%	9,087	62%	9,238	59%	2.1%	1.7%
Soccer (Outdoor)	12,944	100%	11,932	100%	11,924	100%	-7.9%	-0.1%
<i>Casual (1-25 times)</i>	6,740	52%	6,342	53%	6,665	56%	-1.1%	5.1%
<i>Core (26+ times)</i>	6,205	48%	5,590	47%	5,259	44%	-15.2%	-5.9%
Softball (Slow Pitch)	7,411	100%	7,690	100%	7,283	100%	-1.7%	-5.3%
<i>Casual (1-12 times)</i>	2,825	38%	3,377	44%	3,060	42%	8.3%	-9.4%
<i>Core(13+ times)</i>	4,586	62%	4,314	56%	4,223	58%	-7.9%	-2.1%
Badminton	7,278	100%	7,354	100%	6,430	100%	-11.7%	-12.6%
<i>Casual (1-12 times)</i>	5,092	70%	5,285	72%	4,564	71%	-10.4%	-13.6%
<i>Core(13+ times)</i>	2,185	30%	2,069	28%	1,867	29%	-14.6%	-9.8%
Volleyball (Court)	6,384	100%	6,216	100%	6,317	100%	-1.0%	1.6%
<i>Casual (1-12 times)</i>	2,553	40%	2,852	46%	2,939	47%	15.1%	3.1%
<i>Core(13+ times)</i>	3,831	60%	3,364	54%	3,378	53%	-11.8%	0.4%
Football, Flag	5,865	100%	6,173	100%	6,551	100%	11.7%	6.1%
<i>Casual (1-12 times)</i>	2,963	51%	3,249	53%	3,572	55%	20.6%	9.9%
<i>Core(13+ times)</i>	2,902	49%	2,924	47%	2,979	45%	2.7%	1.9%
Football, Touch	7,295	100%	5,686	100%	5,629	100%	-22.8%	-1.0%
<i>Casual (1-12 times)</i>	4,015	55%	3,304	58%	3,332	59%	-17.0%	0.8%
<i>Core(13+ times)</i>	3,280	45%	2,386	42%	2,297	41%	-30.0%	-3.7%
Volleyball (Sand/Beach)	4,505	100%	5,489	100%	4,947	100%	9.8%	-9.9%
<i>Casual (1-12 times)</i>	3,040	67%	3,989	73%	3,544	72%	16.6%	-11.2%
<i>Core(13+ times)</i>	1,465	33%	1,500	27%	1,403	28%	-4.2%	-6.5%
Football, Tackle	6,220	100%	5,481	100%	5,224	100%	-16.0%	-4.7%
<i>Casual (1-25 times)</i>	2,566	41%	2,242	41%	2,145	41%	-16.4%	-4.3%
<i>Core(26+ times)</i>	3,655	59%	3,240	59%	3,078	59%	-15.8%	-5.0%
Gymnastics	5,115	100%	5,381	100%	4,805	100%	-6.1%	-10.7%
<i>Casual (1-49 times)</i>	3,252	64%	3,580	67%	3,139	65%	-3.5%	-12.3%
<i>Core(50+ times)</i>	1,863	36%	1,800	33%	1,666	35%	-10.6%	-7.4%
Soccer (Indoor)	4,617	100%	5,117	100%	5,399	100%	16.9%	5.5%
<i>Casual (1-12 times)</i>	2,006	43%	2,347	46%	2,657	49%	32.5%	13.2%
<i>Core(13+ times)</i>	2,611	57%	2,770	54%	2,742	51%	5.0%	-1.0%
Track and Field	4,257	100%	4,116	100%	4,161	100%	-2.3%	1.1%
<i>Casual (1-25 times)</i>	1,820	43%	1,961	48%	2,040	49%	12.1%	4.0%
<i>Core(26+ times)</i>	2,437	57%	2,155	52%	2,121	51%	-13.0%	-1.6%
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	Mostly Casual Participants (greater than 75%)

*Golf participation figures are from 2015

Figure 48: Core vs. Casual Participation Trends by General Sport Activity (SFIA) Part I

National Core vs Casual Participatory Trends - General Sports								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Cheerleading	3,244	100%	4,029	100%	3,816	100%	17.6%	-5.3%
Casual (1-25 times)	1,514	47%	2,365	59%	2,164	57%	42.9%	-8.5%
Core(26+ times)	1,730	53%	1,664	41%	1,653	43%	-4.5%	-0.7%
Ultimate Frisbee	5,131	100%	3,673	100%	3,126	100%	-39.1%	-14.9%
Casual (1-12 times)	3,647	71%	2,746	75%	2,270	73%	-37.8%	-17.3%
Core(13+ times)	1,484	29%	927	25%	856	27%	-42.3%	-7.7%
Racquetball	4,070	100%	3,579	100%	3,526	100%	-13.4%	-1.5%
Casual (1-12 times)	2,572	63%	2,488	70%	2,451	70%	-4.7%	-1.5%
Core(13+ times)	1,498	37%	1,092	30%	1,075	30%	-28.2%	-1.6%
Pickleball	N/A	N/A	2,815	100%	3,132	100%	N/A	11.3%
Ice Hockey	2,363	100%	2,697	100%	2,544	100%	7.7%	-5.7%
Casual (1-12 times)	1,082	46%	1,353	50%	1,227	48%	13.4%	-9.3%
Core(13+ times)	1,281	54%	1,344	50%	1,317	52%	2.8%	-2.0%
Softball (Fast Pitch)	2,624	100%	2,467	100%	2,309	100%	-12.0%	-6.4%
Casual (1-25 times)	1,245	47%	1,198	49%	1,077	47%	-13.5%	-10.1%
Core(26+ times)	1,379	53%	1,269	51%	1,232	53%	-10.7%	-2.9%
Lacrosse	1,607	100%	2,090	100%	2,171	100%	35.1%	3.9%
Casual (1-12 times)	788	49%	1,153	55%	1,142	53%	44.9%	-1.0%
Core(13+ times)	819	51%	938	45%	1,030	47%	25.8%	9.8%
Roller Hockey	1,367	100%	1,929	100%	1,834	100%	34.2%	-4.9%
Casual (1-12 times)	875	64%	1,438	75%	1,419	77%	62.2%	-1.3%
Core(13+ times)	493	36%	491	25%	415	23%	-15.8%	-15.5%
Wrestling	1,922	100%	1,922	100%	1,896	100%	-1.4%	-1.4%
Casual (1-25 times)	965	50%	1,139	59%	1,179	62%	22.2%	3.5%
Core(26+ times)	957	50%	782	41%	717	38%	-25.1%	-8.3%
Rugby	887	100%	1,550	100%	1,621	100%	82.8%	4.6%
Casual (1-7 times)	526	59%	1,090	70%	1,097	68%	108.6%	0.6%
Core(8+ times)	361	41%	460	30%	524	32%	45.2%	13.9%
Squash	1,290	100%	1,549	100%	1,492	100%	15.7%	-3.7%
Casual (1-7 times)	928	72%	1,111	72%	1,044	70%	12.5%	-6.0%
Core(8+ times)	361	28%	437	28%	447	30%	23.8%	2.3%
Field Hockey	1,237	100%	1,512	100%	1,596	100%	29.0%	5.6%
Casual (1-7 times)	578	47%	773	51%	897	56%	55.2%	16.0%
Core(8+ times)	659	53%	739	49%	700	44%	6.2%	-5.3%
Boxing for Competition	959	100%	1,210	100%	1,368	100%	42.6%	13.1%
Casual (1-12 times)	769	80%	1,035	86%	1,168	85%	51.9%	12.9%
Core(13+ times)	190	20%	176	14%	199	15%	4.7%	13.1%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

Figure 49: Core vs. Casual Participation Trends by General Sport Activity (SFIA) Part II

GENERAL FITNESS

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Fitness Walking	114,029	100%	107,895	100%	110,805	100%	-2.8%	2.7%
<i>Casual (1-49 times)</i>	35,267	31%	34,535	32%	35,326	32%	0.2%	2.3%
<i>Core(50+ times)</i>	78,762	69%	73,359	68%	75,479	68%	-4.2%	2.9%
Treadmill	50,839	100%	51,872	100%	52,966	100%	4.2%	2.1%
<i>Casual (1-49 times)</i>	22,248	44%	23,490	45%	24,444	46%	9.9%	4.1%
<i>Core(50+ times)</i>	28,591	56%	28,381	55%	28,523	54%	-0.2%	0.5%
Free Weights (Dumbbells/Hand Weights)	N/A	100%	51,513	100%	52,217	100%	N/A	1.4%
<i>Casual (1-49 times)</i>	N/A		18,245	35%	18,866	36%	N/A	3.4%
<i>Core(50+ times)</i>	N/A		33,268	65%	33,351	64%	N/A	0.2%
Running/Jogging	51,450	100%	47,384	100%	50,770	100%	-1.3%	7.1%
<i>Casual (1-49 times)</i>	21,973	43%	21,764	46%	24,004	47%	9.2%	10.3%
<i>Core(50+ times)</i>	29,478	57%	25,621	54%	26,766	53%	-9.2%	4.5%
Stationary Cycling (Recumbent/Upright)	35,987	100%	36,118	100%	36,035	100%	0.1%	-0.2%
<i>Casual (1-49 times)</i>	18,265	51%	18,240	51%	18,447	51%	1.0%	1.1%
<i>Core(50+ times)</i>	17,722	49%	17,878	49%	17,588	49%	-0.8%	-1.6%
Weight/Resistant Machines	38,999	100%	35,768	100%	36,291	100%	-6.9%	1.5%
<i>Casual (1-49 times)</i>	15,383	39%	14,346	40%	14,496	40%	-5.8%	1.0%
<i>Core(50+ times)</i>	23,617	61%	21,422	60%	21,795	60%	-7.7%	1.7%
Stretching	35,873	100%	33,771	100%	33,195	100%	-7.5%	-1.7%
<i>Casual (1-49 times)</i>	8,996	25%	9,793	29%	10,095	30%	12.2%	3.1%
<i>Core(50+ times)</i>	26,877	75%	23,978	71%	23,100	70%	-14.1%	-3.7%
Elliptical Motion Trainer*	28,560	100%	32,218	100%	32,283	100%	13.0%	0.2%
<i>Casual (1-49 times)</i>	13,638	48%	15,687	49%	15,854	49%	16.2%	1.1%
<i>Core(50+ times)</i>	14,922	52%	16,532	51%	16,430	51%	10.1%	-0.6%
Free Weights (Barbells)	26,688	100%	26,473	100%	27,444	100%	2.8%	3.7%
<i>Casual (1-49 times)</i>	9,435	35%	10,344	39%	10,868	40%	15.2%	5.1%
<i>Core(50+ times)</i>	17,253	65%	16,129	61%	16,576	60%	-3.9%	2.8%
Yoga	23,253	100%	26,268	100%	27,354	100%	17.6%	4.1%
<i>Casual (1-49 times)</i>	13,305	57%	15,486	59%	16,454	60%	23.7%	6.3%
<i>Core(50+ times)</i>	9,949	43%	10,782	41%	10,900	40%	9.6%	1.1%
Calisthenics/Bodyweight Exercise	N/A	100%	25,110	100%	24,454	100%	N/A	-2.6%
<i>Casual (1-49 times)</i>	N/A	0	9,763	39%	10,095	41%	N/A	3.4%
<i>Core(50+ times)</i>	N/A	0	15,347	61%	14,359	59%	N/A	-6.4%
Choreographed Exercise	N/A	100%	21,839	100%	22,616	100%	N/A	3.6%
<i>Casual (1-49 times)</i>	N/A	0	14,158	65%	14,867	66%	N/A	5.0%
<i>Core(50+ times)</i>	N/A	0	7,681	35%	7,748	34%	N/A	0.9%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	

*Cardio Cross Trainer is merged to Elliptical Motion Trainer

Figure 50: Core vs. Casual Participation Trends by Fitness Activity (SFIA) Part I

National Core vs Casual Participatory Trends - General Fitness								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Aerobics (High Impact)	16,178	100%	21,390	100%	21,476	100%	32.7%	0.4%
<i>Casual (1-49 times)</i>	7,819	48%	11,801	55%	12,105	56%	54.8%	2.6%
<i>Core(50+ times)</i>	8,359	52%	9,589	45%	9,370	44%	12.1%	-2.3%
Stair Climbing Machine	12,979	100%	15,079	100%	14,948	100%	15.2%	-0.9%
<i>Casual (1-49 times)</i>	7,303	56%	9,332	62%	9,501	64%	30.1%	1.8%
<i>Core(50+ times)</i>	5,676	44%	5,747	38%	5,447	36%	-4.0%	-5.2%
Cross-Training Style Workout	N/A	100%	12,914	100%	13,622	100%	N/A	5.5%
<i>Casual (1-49 times)</i>	N/A	N/A	6,430	50%	6,890	51%	N/A	7.2%
<i>Core(50+ times)</i>	N/A	N/A	6,483	50%	6,732	49%	N/A	3.8%
Stationary Cycling (Group)	8,477	100%	8,937	100%	9,409	100%	11.0%	5.3%
<i>Casual (1-49 times)</i>	5,053	60%	5,751	64%	6,023	64%	19.2%	4.7%
<i>Core(50+ times)</i>	3,424	40%	3,186	36%	3,386	36%	-1.1%	6.3%
Pilates Training	8,519	100%	8,893	100%	9,047	100%	6.2%	1.7%
<i>Casual (1-49 times)</i>	5,212	61%	5,525	62%	5,698	63%	9.3%	3.1%
<i>Core(50+ times)</i>	3,307	39%	3,367	38%	3,348	37%	1.2%	-0.6%
Trail Running	5,806	100%	8,582	100%	9,149	100%	57.6%	6.6%
Cardio Kickboxing	6,725	100%	6,899	100%	6,693	100%	-0.5%	-3.0%
<i>Casual (1-49 times)</i>	4,455	66%	4,760	69%	4,671	70%	4.8%	-1.9%
<i>Core(50+ times)</i>	2,271	34%	2,139	31%	2,022	30%	-11.0%	-5.5%
Boot Camp Style Training	7,496	100%	6,583	100%	6,651	100%	-11.3%	1.0%
<i>Casual (1-49 times)</i>	4,787	64%	4,484	68%	4,637	70%	-3.1%	3.4%
<i>Core(50+ times)</i>	2,709	36%	2,099	32%	2,014	30%	-25.7%	-4.0%
Martial Arts	5,075	100%	5,745	100%	5,838	100%	15.0%	1.6%
<i>Casual (1-12 times)</i>	1,207	24%	1,964	34%	2,021	35%	67.4%	2.9%
<i>Core(13+ times)</i>	3,869	76%	3,780	66%	3,816	65%	-1.4%	1.0%
Boxing for Fitness	4,831	100%	5,175	100%	5,157	100%	6.7%	-0.3%
<i>Casual (1-12 times)</i>	2,075	43%	2,678	52%	2,738	53%	32.0%	2.2%
<i>Core(13+ times)</i>	2,756	57%	2,496	48%	2,419	47%	-12.2%	-3.1%
Tai Chi	3,203	100%	3,706	100%	3,787	100%	18.2%	2.2%
<i>Casual (1-49 times)</i>	1,835	57%	2,245	61%	2,329	61%	26.9%	3.7%
<i>Core(50+ times)</i>	1,369	43%	1,461	39%	1,458	39%	6.5%	-0.2%
Barre	N/A	N/A	3,329	100%	3,436	100%	N/A	3.2%
<i>Casual (1-49 times)</i>	N/A	N/A	2,636	79%	2,701	79%	N/A	2.5%
<i>Core(50+ times)</i>	N/A	N/A	693	21%	735	21%	N/A	6.1%
Triathlon (Traditional/Road)	1,789	100%	2,374	100%	2,162	100%	20.8%	-8.9%
<i>Casual (1 times)</i>	616	34%	786	33%	754	35%	22.4%	-4.1%
<i>Core(2+ times)</i>	1,173	66%	1,589	67%	1,408	65%	20.0%	-11.4%
Triathlon (Non-Traditional/Off Road)	1,075	100%	1,705	100%	1,878	100%	74.7%	10.1%
<i>Casual (1 times)</i>	341	32%	647	38%	749	40%	119.6%	15.8%
<i>Core(2+ times)</i>	734	68%	1,058	62%	1,129	60%	53.8%	6.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

Figure 51: Core vs. Casual Participation Trends by Fitness Activity (SFIA) Part II

OUTDOOR/ADVENTURE RECREATION

National Core vs Casual Participatory Trends - Outdoor / Adventure Recreation								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Hiking (Day)	34,519	100%	42,128	100%	44,900	100%	30.1%	6.6%
Bicycling (Road)	39,790	100%	38,365	100%	38,866	100%	-2.3%	1.3%
<i>Casual (1-25 times)</i>	18,966	48%	19,244	50%	20,212	52%	6.6%	5.0%
<i>Core(26+ times)</i>	20,824	52%	19,121	50%	18,654	48%	-10.4%	-2.4%
Fishing (Freshwater)	39,002	100%	38,121	100%	38,346	100%	-1.7%	0.6%
<i>Casual (1-7 times)</i>	20,341	52%	20,308	53%	19,977	52%	-1.8%	-1.6%
<i>Core(8+ times)</i>	18,660	48%	17,813	47%	18,369	48%	-1.6%	3.1%
Camping (< 1/4 Mile of Vehicle/Home)	31,454	100%	26,467	100%	26,262	100%	-16.5%	-0.8%
Camping (Recreational Vehicle)	15,903	100%	15,855	100%	16,159	100%	1.6%	1.9%
<i>Casual (1-7 times)</i>	8,316	52%	8,719	55%	9,332	58%	12.2%	7.0%
<i>Core(8+ times)</i>	7,587	48%	7,136	45%	6,826	42%	-10.0%	-4.3%
Fishing (Saltwater)	12,000	100%	12,266	100%	13,062	100%	8.9%	6.5%
<i>Casual (1-7 times)</i>	7,251	60%	7,198	59%	7,625	58%	5.2%	5.9%
<i>Core(8+ times)</i>	4,749	40%	5,068	41%	5,437	42%	14.5%	7.3%
Birdwatching (>1/4 mile of Vehicle/Home)	13,535	100%	11,589	100%	12,296	100%	-9.2%	6.1%
Backpacking Overnight	7,933	100%	10,151	100%	10,975	100%	38.3%	8.1%
Bicycling (Mountain)	7,265	100%	8,615	100%	8,609	100%	18.5%	-0.1%
<i>Casual (1-12 times)</i>	3,270	45%	4,273	50%	4,389	51%	34.2%	2.7%
<i>Core(13+ times)</i>	3,995	55%	4,342	50%	4,220	49%	5.6%	-2.8%
Archery	7,173	100%	7,903	100%	7,769	100%	8.3%	-1.7%
<i>Casual (1-25 times)</i>	5,967	83%	6,650	84%	6,602	85%	10.6%	-0.7%
<i>Core(26+ times)</i>	1,205	17%	1,253	16%	1,167	15%	-3.2%	-6.9%
Fishing (Fly)	5,848	100%	6,456	100%	6,791	100%	16.1%	5.2%
<i>Casual (1-7 times)</i>	3,598	62%	4,183	65%	4,448	65%	23.6%	6.3%
<i>Core(8+ times)</i>	2,250	38%	2,273	35%	2,344	35%	4.2%	3.1%
Skateboarding	6,227	100%	6,442	100%	6,382	100%	2.5%	-0.9%
<i>Casual (1-25 times)</i>	3,527	57%	3,955	61%	3,970	62%	12.6%	0.4%
<i>Core(26+ times)</i>	2,700	43%	2,487	39%	2,411	38%	-10.7%	-3.1%
Roller Skating (In-Line)	6,647	100%	5,381	100%	5,268	100%	-20.7%	-2.1%
<i>Casual (1-12 times)</i>	4,548	68%	3,861	72%	3,853	73%	-15.3%	-0.2%
<i>Core(13+ times)</i>	2,100	32%	1,520	28%	1,415	27%	-32.6%	-6.9%
Bicycling (BMX)	1,861	100%	3,104	100%	3,413	100%	83.4%	10.0%
<i>Casual (1-12 times)</i>	856	46%	1,760	57%	2,039	60%	138.2%	15.9%
<i>Core(13+ times)</i>	1,005	54%	1,344	43%	1,374	40%	36.7%	2.2%
Adventure Racing	1,618	100%	2,999	100%	2,529	100%	56.3%	-15.7%
<i>Casual (1 times)</i>	672	42%	1,081	36%	899	36%	33.8%	-16.8%
<i>Core(2+ times)</i>	945	58%	1,918	64%	1,630	64%	72.5%	-15.0%
Climbing (Traditional/Ice/Mountaineering)	2,189	100%	2,790	100%	2,527	100%	15.4%	-9.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

Figure 52: Core vs. Casual Participation Trends by Outdoor Recreation Activity (SFIA)

AQUATICS

National Core vs Casual Participatory Trends - Aquatics								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Swimming (Fitness)	23,216	100%	26,601	100%	27,135	100%	16.9%	2.0%
<i>Casual (1-49 times)</i>	15,139	65%	17,781	67%	18,319	68%	21.0%	3.0%
<i>Core(50+ times)</i>	8,077	35%	8,820	33%	8,815	32%	9.1%	-0.1%
Aquatic Exercise	9,177	100%	10,575	100%	10,459	100%	14.0%	-1.1%
<i>Casual (1-49 times)</i>	5,785	63%	7,135	67%	7,222	69%	24.8%	1.2%
<i>Core(50+ times)</i>	3,392	37%	3,440	33%	3,237	31%	-4.6%	-5.9%
Swimming (Competition)	2,502	100%	3,369	100%	3,007	100%	20.2%	-10.7%
<i>Casual (1-49 times)</i>	1,065	43%	1,881	56%	1,664	55%	56.2%	-11.5%
<i>Core(50+ times)</i>	1,437	57%	1,488	44%	1,343	45%	-6.5%	-9.7%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

Figure 53: Core vs. Casual Participation Trends by Aquatics Activity (SFIA)

WATER SPORTS/ACTIVITIES

National Core vs Casual Participatory Trends - Water Sports / Activities								
Activity	Participation Levels						% Change	
	2012		2016		2017		5-Year Trend	1-Year Trend
	#	%	#	%	#	%		
Canoeing	9,813	100%	10,046	100%	9,220	100%	-6.0%	-8.2%
Kayaking (Recreational)	8,187	100%	10,017	100%	10,533	100%	28.7%	5.2%
Snorkeling	8,664	100%	8,717	100%	8,384	100%	-3.2%	-3.8%
<i>Casual (1-7 times)</i>	6,904	80%	6,945	80%	6,721	80%	-2.7%	-3.2%
<i>Core(8+ times)</i>	1,760	20%	1,773	20%	1,663	20%	-5.5%	-6.2%
Jet Skiing	6,996	100%	5,783	100%	5,418	100%	-22.6%	-6.3%
<i>Casual (1-7 times)</i>	5,125	73%	4,143	72%	3,928	72%	-23.4%	-5.2%
<i>Core(8+ times)</i>	1,870	27%	1,640	28%	1,490	28%	-20.3%	-9.1%
Sailing	3,841	100%	4,095	100%	3,974	100%	3.5%	-3.0%
<i>Casual (1-7 times)</i>	2,565	67%	2,833	69%	2,720	68%	6.0%	-4.0%
<i>Core(8+ times)</i>	1,276	33%	1,262	31%	1,254	32%	-1.7%	-0.6%
Water Skiing	4,434	100%	3,700	100%	3,572	100%	-19.4%	-3.5%
<i>Casual (1-7 times)</i>	3,122	70%	2,667	72%	2,575	72%	-17.5%	-3.4%
<i>Core(8+ times)</i>	1,312	30%	1,033	28%	997	28%	-24.0%	-3.5%
Rafting	3,756	100%	3,428	100%	3,479	100%	-7.4%	1.5%
Stand-Up Paddling	1,392	100%	3,220	100%	3,325	100%	138.9%	3.3%
Kayaking (Sea/Touring)	2,446	100%	3,124	100%	2,955	100%	20.8%	-5.4%
Scuba Diving	2,781	100%	3,111	100%	2,874	100%	3.3%	-7.6%
<i>Casual (1-7 times)</i>	1,932	69%	2,292	74%	2,113	74%	9.4%	-7.8%
<i>Core(8+ times)</i>	849	31%	819	26%	761	26%	-10.4%	-7.1%
Wakeboarding	3,368	100%	2,912	100%	3,005	100%	-10.8%	3.2%
<i>Casual (1-7 times)</i>	2,237	66%	2,017	69%	2,101	70%	-6.1%	4.2%
<i>Core(8+ times)</i>	1,132	34%	895	31%	903	30%	-20.2%	0.9%
Surfing	2,545	100%	2,793	100%	2,680	100%	5.3%	-4.0%
<i>Casual (1-7 times)</i>	1,544	61%	1,768	63%	1,705	64%	10.4%	-3.6%
<i>Core(8+ times)</i>	1,001	39%	1,024	37%	975	36%	-2.6%	-4.8%
Kayaking (White Water)	1,878	100%	2,552	100%	2,500	100%	33.1%	-2.0%
Boardsailing/Windsurfing	1,372	100%	1,737	100%	1,573	100%	14.7%	-9.4%
<i>Casual (1-7 times)</i>	1,108	81%	1,449	83%	1,289	82%	16.3%	-11.0%
<i>Core(8+ times)</i>	264	19%	288	17%	284	18%	7.6%	-1.4%
NOTE: Participation figures are in 000's for the US population ages 6 and over								
Participation Growth/Decline	Large Increase (greater than 25%)		Moderate Increase (0% to 25%)		Moderate Decrease (0% to -25%)		Large Decrease (less than -25%)	
Core vs Casual Distribution	Mostly Core Participants (greater than 75%)		More Core Participants (56-74%)		Evenly Divided (45-55% Core and Casual)		More Casual Participants (56-74%)	
							Mostly Casual Participants (greater than 75%)	

Figure 54: Core vs. Casual Participation Trends by Water Sports Activity (SFIA)

10.3 APPENDIX C: OPPORTUNITY STATEMENTS

10.3.1 ADAPTIVE

1. There is an opportunity to establish the market niche CCPR wants to have for youth and adults with disabilities
 - a. Examine the feasibility of developing a “Miracle League” to serve the northern Indianapolis community
 - b. Examine the feasibility of becoming a Paralympic test site location
2. The top reasons survey respondents said they do not attend adaptive programs is because of times and lack of program awareness
 - a. Examine the feasibility of a separate mailing for adaptive programs
 - b. Concentrate on Areas 1 and 5 for adaptive programming participation because 9% responded that they have a need for adaptive programming yet they did not report participating in a CCPR program
 - c. Communicate with the library to establish what services (if any) they offer for people with disabilities to see if a partnership can be developed
 - d. Consider concentrating on the following program formats for adaptive programming:
 - i. Youth
 1. Days: F, Sa, and Su
 2. Time: any
 3. Format: any
 - ii. Adults
 1. Days: F, Sa, and Su
 2. Time: evening
 3. Format: one program/week
 - iii. Seniors
 1. Days: M, W, and Sa
 2. Time: morning
 3. Format: one program/week
 - e. Enhance marketing for Friday classes, Monday classes, Tuesday classes, and Tuesday/Thursday classes because they ran the most often according to participation data

3. Concentrate resources and establish baseline thresholds for adaptive programs
 - a. Focus “youth” and “tweens/teens” adaptive programming to those that have shown good historical participation numbers as these age group programs have had the most canceled classes in the last two years
 - b. Create a minimum threshold number for adaptive programs as 65 classes were classified as “under min” but still ran in the last two years

10.3.2 ADULT

1. There is a disconnect between locally canceled programs and programs that have experienced upward trends nationally
 - a. Arts (performing, visual, crafts) seem to be canceled often in the last two years and community input suggests adult art should be more of a medium priority; therefore, adult art programming may need to be “right sized” to reflect interest
2. There are many identified “need” areas for adult programming
 - a. Adult health
 - b. Adult outdoor recreation
 - c. Adult sports
 - d. Adult nature
3. Consider concentrating on the following program formats for adult programming:
 - a. Adult
 - i. Days: Sa and Su
 - ii. Time: Evenings and mornings
 - iii. Format: One program/week
 - b. Senior
 - i. Days: Weekdays
 - ii. Time: Morning
 - iii. Format: One program/week
4. There are a lot of competitor organizations in and around Carmel that compete for adult programming
 - a. Concentrate on sport clinics and become a feeder-system for the surrounding organizations
 - b. Focus on activities that the local market has shown a proclivity for
 - i. Sports
 1. Golf

2. Tennis/Pickleball
3. Football
4. Basketball
5. Baseball
- ii. Fitness
 1. Weight lifting
 2. Jogging/running
 3. Yoga
 4. Aerobics
 5. Pilates
- iii. Outdoor activities
 1. Hiking
 2. Mountain biking
 3. Road biking
 4. Canoeing/kayaking
 5. Boating
- c. Match local interest with national recreation trends and plan infrastructure/space requirements accordingly
 - i. Casual activity increases (nationally) - meaning *consistent* program participation will be less frequent (less of a “core” activity)
 1. Aquatics
 2. Ultimate Frisbee
 3. Roller hockey
 4. Cheerleading
 5. Boxing
 6. Non-traditional/off-road triathlons
 7. Tai Chi
 8. Martial arts
 9. BMX biking
 10. Stand-up paddling
 11. Kayaking
 - ii. Core activity increases (nationally) - meaning participants will typically stick with these activities longer and will have more dedication to participation (frequency and intensity)

1. Flag football
 2. Indoor soccer
 3. Lacrosse
 4. Rugby
 5. Yoga
 6. BMX biking
- iii. Core activity decreases (nationally)
1. Roller skating
 2. Skateboarding
 3. Road bicycling
 4. Archery
 5. Boot camp style training

10.3.3 AQUATICS

1. Aquatics programs are a relatively low community priority compared to other program areas; this indicates an opportunity to maintain existing level of service and maximizing programming efficiencies
 - a. 46% of all canceled programs are categorized as “all ages” even though they are for children 6 and up; consider re-labeling these classes to better capture and report the target audience
 - b. Continue to focus on preschool/toddler programs as they are identified as a “medium priority for investment” and 35% of total program registrations come from this age group
 - c. Re-assess “log rolling” programs as more than half of the planned activities have been canceled and the ones that do “go” have been “under min”
2. More survey respondents reported using other organizations for aquatics than CCPR
 - a. Consider concentrating on the following program formats for CCPR aquatics programming:
 - i. Preschool/toddler
 1. Days: Su, Tu, W, Sa, M, F
 2. Time: Morning
 3. Format: one program/week
 - ii. Youth
 1. Days: Sa, M, Tu, Fr

2. Time: Evening
3. Format: one program/week
- iii. Adult
 1. Days: Sa, Su, F
 2. Time: Any
 3. Format: Any but high percentage for one program/week

10.3.4 PARENT-CHILD

1. Consider concentrating on the following program formats for CCPR parent-child programming:
 - a. Days: Sa, Su, T
 - b. Time: Any
 - c. Format: any but high percentage for one program/week
2. Maximize program efficiencies
 - a. Parent-child programs have the most “under max” programs and they make up 72% of all registrations over the last two years; therefore, concentrate on slightly reducing existing offerings to maximize utilization rates and increase cost recovery
 - b. Expand parent-child programming to Area 5 (West Park most likely) as no one reported participating in a CCPR parent-child program but they reported using other providers for this need

10.3.5 PRESCHOOL-TODDLER

1. More programs are offered between 9am-noon, but more programs “go” between 4-7pm; however, survey respondents prefer morning to afternoon for children under age 6 indicating there may be differential preferences based on the type of preschool-toddler program; consider concentrating on the following program formats for CCPR “unmet need” preschool-toddler programming:
 - a. Art
 - i. Days: Su, Sa, M, W, F
 - ii. Time: Morning
 - iii. Format: one program/week
 - b. Nature
 - i. Days: Su, F, Sa, M, W

- ii. Time: Morning
 - iii. Format: one program/week
 - c. Sports
 - i. Days: M, Tu, W, Su
 - ii. Time: Morning
 - iii. Format: one program/week
- 2. Pre-school/toddler programs may have a location preference from residents as 39% of activities not offered at the MCC were canceled over the last two years
 - a. Concentrate on park infrastructure improvements that coincide with parents and young children (restrooms, shade, shelter, perceptions of safety, etc.) if programming outside of the MCC is desired
 - b. Continue to facilitate programming at the MCC to increase utilization rates
- 3. Continue to address unmet need areas
 - a. Increase “single day” programs as pre-school/toddler programs have the second highest “single day” (one time instance) preference among all Program Areas and Categories; consider doing more “meet and greet” events as “friends” is the number one reason why people use other organizations besides CCPR
 - b. Expand outreach to area 3 residents as they report using other organizations more for pre-school/toddler programs than CCPR
 - c. Seek out and market to new families (less than 10 years residency) as they indicate the most need for these programs

10.3.6 TWEEN-TEEN

- 1. This Program Area and Category can be enhanced or reduced because it is the only Program Area and Category that has had more canceled than closed programs in the last two years
 - a. Conduct focus groups with existing participants to ascertain what can be improved or expanded for this focus area
 - b. Concentrate on gathering areas and “open” programs for tween-teen programming as national trends indicate there is more appeal to spaces/places than programmed activities
- 2. All but five programs occurred at the MCC in the last two years, but areas 1 and 5 report double digit percentages of using organizations other than MCC; however, programs at Founders Park receive greater than 80% registration rates

- a. Concentrate existing tween-teen programs at Founders Park
 - b. Concentrate introduce new programming at West Park and Inlow Park after proving out Founders Park location as demographic projections indicate these areas will experience the highest growth rates over the next 15 years
3. Consider concentrating on program topics and spaces, but the following program formats for CCPR tween/teen programming may be beneficial to examine:
 - a. Tween/teen
 - i. Days: Sa, Su, W, Any
 - ii. Time: Any (evening second choice)
 - iii. Format: any

10.3.7 WELLNESS

1. Consider concentrating on the following program formats for CCPR wellness programming:
 - a. Youth health
 - i. Days: Sa, Su, Tu
 - ii. Time: Evening (followed closely by “any”)
 - iii. Format: one program/week
 - b. Adult health
 - i. Days: Sa, Su, F, W
 - ii. Time: Evenings
 - iii. Format: one program/week
 - c. Senior health
 - i. Days: Any
 - ii. Time: Any (but mornings are a close second)
 - iii. Format: Any
2. Focus on maximizing program utilization rates and data efficiencies
 - a. Reduce the number of pre-9am classes because they have almost the same cancelation rate as “go” rate
 - b. Concentrate on single-day activities because they are the most popular and account for 80% of all registrations in the last two years
 - c. Ensure data reporting includes the “enrollment status” as 28% of all activities in the last two years do not have one recorded
3. Wellness programming is a very competitive market within the Carmel community

- a. Area 4 and 5 residents indicate using organizations other than CCPR as much or almost as much so there is an opportunity to look at West Park as a potential programming site
- b. The top reason individuals use other organizations for wellness programming is “time” so it is critical that CCPR:
 - i. Facilitates quick and drop-in wellness opportunities
 - ii. Bring more directed programming to local parks
 - iii. Pursue opportunities for public/private partnerships for alternative wellness programming to help meet “unmet” needs

10.3.8 YOUTH

- 1. There are many identified “need” areas for youth programming
 - a. Youth art
 - b. Youth nature
 - c. Youth performing arts
- 2. Consider concentrating on the following program formats for CCPR youth programming:
 - a. Youth art
 - i. Days: Sa, Su, M
 - ii. Time: afternoon and evening
 - iii. Format: one program/week
 - b. Youth nature
 - i. Days: Sa, Tu, Su
 - ii. Time: afternoon and evening
 - iii. Format: one program/week
 - c. Youth performing arts
 - i. Days: Sa, Tu, Th, Fr
 - ii. Time: afternoon and evening
 - iii. Format: one program/week
- 3. Maximize existing youth program offerings and data collection
 - a. Reduce the M/W format classes as 77% of those in the last two years were “under min”
 - b. Continue to “right size” M-F format classes as they had the most number of “full” activities in the last two years

- c. Continue to “right size” morning activities as this timeframe had the most “full” activities in the last two years but the survey indicates a preference for evenings
- 4. Expand youth programming into other opportunities
 - a. Enhance youth programming at West Park as area 5 residents indicate using organizations other than CCPR for youth programming
 - b. Expand youth programming into nature/environmental education as residents indicate an important reason for not using CCPR for youth programming is because the “program is not offered” that they are interested in

10.4 APPENDIX D: UNDERSERVED POPULATIONS REPORT

Program	Program Section	How does it serve as a potential outreach to underserved populations?
Teen Night Out	Adaptive	Targets adaptive teens in the community. The adaptive population and teen population is underserved and this provides an avenue for an evening of activity and socializing.
Adaptive Table Tennis	Adaptive	A unique program that is available for our adaptive population.
Birds and Bees	Adaptive	An outstanding program that centers around sex education for our adaptive population. This is a unique program that is unmatched with useful information and great instruction.
Adaptive Private Swim Lessons	Adaptive	Affords adaptive population an opportunity for one on one swim instruction. Provides the individualized attention that is needed.
Dynamic Dolphins	Adaptive	Promotes a group swim setting, an opportunity to use our waterpark with individualized instruction.
Adaptive Yoga	Adaptive	Adapted version of the popular fitness program. Promotes health and fitness.
Adaptive Flowrider	Adaptive	This program teaches participants to safely ride the surf simulator in our waterpark. Participants begin buddy riding with an instructor and if able progress to solo rides.
Adaptive Music Therapy	Adaptive	The use of music to promote development in speech, singing, and piano lessons.
Out and About	Adaptive	A great program to familiarize and acclimate the adaptive participants to day to day life activities.
Try-A-Thon	Adaptive	A triathlon program for the adaptive community. An adapted version of this great fitness activity.
MCC Table Tennis Club	Adult	This sport is very popular with the asian community, a large population base in Carmel, IN.
MCC Spring Open 2013	Adult	This sport is very popular with the asian community, a large population base in Carmel, IN.
Introduction to ASL	Adult	Serves those interested in learning ASL, mainly those that work with hearing impaired.
Basic ASL	Adult	Serves those interested in learning ASL, mainly those that work with hearing impaired.
Intro to Mac Hardware and Applications	Adult	Serves the active adult community, many who struggle with operating today's popular technology.
Bridge Defense	Adult	Serves the active adult community, an underserved population in Carmel/Clay Township, offers an opportunity for them to recreate.
Bridge Practice and Play	Adult	Serves the active adult community, an underserved population in Carmel/Clay Township, offers an opportunity for them to recreate.
Bridge Club	Adult	Serves the active adult community, an underserved population in Carmel/Clay Township, offers an opportunity for them to recreate.
Basic Pet Manners	Adult	The community of Carmel/Clay is very pet friendly, this program caters to the growing number of pet owners in the area.
Infant Massage	Adult	This program serves a group we do not currently offer any other program for, mothers and their babies.
Pickleball	Adult	Serves the active adult community which we struggle to get involved in our programming. This was a community request.
Badminton	Adult	Another community request for this program. Very popular amongst active adults and the asian community.
Financial Planning	Adult	Serves the active adult population, providing educational opportunities for them.
Understanding the Medicare Maze	Adult	Serves the active adult population, providing educational opportunities for them.
Gentle Aqua	Aqua Fitness	Designed to meet the needs of guests who have contraindications, injuries and/or health issues that prevent them from impact exercise. This affordable and safe, non-impact exercise format can reduce body inflammation, increase range of motion, and contains a social aspect that could encourage participants to exercise regularly.
Home School Swim	Aquatics	Each month our facility is able to reach a population of homeschool children through our swim lesson program. We give these children an opportunity to learn basic water safety and swimming skills in a welcoming, fun environment. This gives them an opportunity to create bonds with other homeschool children and families while learning a valuable life skill. We designated a time for these participants that would fit into their daily homeschooling routine, set aside from the general public. This helps our instructors focus on individualizing these lessons.
Low Impact	Fitness	Recently changed to "Active Strength" to focus on the needs of Active Older Adults, and encourage strength and flexibility maintenance as bones age and density lessens. This format purposely falls into the time slot when our center sees a higher number of mature guests.
Gentle Yoga	Fitness	An economical and safe wellness program designed to introduce the new exerciser to the format of Yoga. A mind-body activity that can reduce stress and/or depression while increasing balance and flexibility. Intro class could reduce or eliminate fear in trying a new exercise format.
Intro to Yoga	Fitness	An economical and safe wellness program designed to introduce the new exerciser to the format of Yoga. A mind-body activity that can reduce stress and/or depression while increasing balance and flexibility. Intro class could reduce or eliminate fear in trying a new exercise format.
Intro to TRX	Fitness	An opportunity to create knowledge and awareness of how body weight movements can enhance fitness levels. An affordable wellness session, open to adults of all ages, offered in a safe, controlled environment. There is great potential measurable strength gain which could encourage regular participation and overall improved fitness levels.
Monon Mixer	Special Events	The Monon Mixer encourages adults to come out to the Waterpark for an evening of food, live music, and relaxing. This event allows adults to enjoy the waterpark features such as FlowRider, lap pool, lazy river, and more without kids running around. With so many of our events focusing on the entire family this is the perfect event for college friends, neighborhoods, or small groups to get together and relax.
Barktember	Special Events	Barktember is our only dog event of the year and allows the dogs to take over the waterpark (after the pools have been closed to the general public). Net proceeds benefit the Humane Society for Hamilton County, making this a community favorite and great work out for the dogs!
Sk8night	Special Events	SK8 Night reaches our teenage and young adult population that is hard to otherwise capture at a single event. "Skaters", friends, and spectators attend this night time event to try out their skills, learn from others, and enjoy the live band. In partnership with RISE Skateboard shop, this event provides a safe evening for the sometimes forgotten or "rough-around-the-edges" teenagers who just want to have a good time.
Teen Pilates	Teen	Targets the teen population which seldom participates in our programs. Opportunities for teens to take fitness classes is also scarce in the area so this provides them an opportunity to take the popular adult classes with their peers.
Teen Yoga	Teen	Targets the teen population which seldom participates in our programs. Opportunities for teens to take fitness classes is also scarce in the area so this provides them an opportunity to take the popular adult classes with their peers.
Teen Turbokick	Teen	Targets the teen population which seldom participates in our programs. Opportunities for teens to take fitness classes is also scarce in the area so this provides them an opportunity to take the popular adult classes with their peers.
Teen Cardio Dance	Teen	Targets the teen population which seldom participates in our programs. Opportunities for teens to take fitness classes is also scarce in the area so this provides them an opportunity to take the popular adult classes with their peers.
Teen Cycling	Teen	Targets the teen population which seldom participates in our programs. Opportunities for teens to take fitness classes is also scarce in the area so this provides them an opportunity to take the popular adult classes with their peers.
Alive At 25	Teen	Program targets teens on the verge of driving. This is a vehicle safety course designed to make our young drivers safer on the roads.

Figure 55: CCPR Underserved Populations Report

10.5 APPENDIX E: SIMILAR PROVIDER INFORMATION TABLE

#	Name	Address	City	State	Zip	Category
1	Carmel Aquatic Center	300 E Main St	Carmel	IN	46032	Aquatics
2	Fairmont Pool & Gym in Village of West Clay	1899 Fairmont St	Carmel	IN	46032	Aquatics
3	Goldfish Swim School - Carmel	271 Merchants Square Dr A-110	Carmel	IN	46032	Aquatics
4	Stony Creek Swim Center	1463 Queensborough Dr	Carmel	IN	46033	Aquatics
5	Noblesville Youth Baseball	2025 Westfield Rd	Noblesville	IN	46062	Baseball
6	Northview Church Carmel Campus	12900 Hazel Dell Pkwy	Carmel	IN	46033	Church
7	School of Self Defense	620 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
8	9Round Carmel	1434 Keystone Way B	Carmel	IN	46032	Health/Fitness
9	9Round Carmel, IN - Michigan Road	9873 N Michigan Rd #135	Carmel	IN	46032	Health/Fitness
10	Adamson's Karate Studios Inc	1307 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
11	Anytime Fitness	110 W Main St Suite 170	Carmel	IN	46032	Health/Fitness
12	Apex Taekwondo Center	14501 Hazel Dell Pkwy	Carmel	IN	46033	Health/Fitness
13	Balance Yoga Center	404 W Main St	Carmel	IN	46032	Health/Fitness
14	Body Mind & Core	1344 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
15	Carmel Total Fitness LLC	820 City Center Dr	Carmel	IN	46032	Health/Fitness
16	Chrome Fitness	890 E 116th St #140	Carmel	IN	46032	Health/Fitness
17	Club Pilates	2482 E 146th St	Carmel	IN	46033	Health/Fitness
18	CORE Pilates & Fitness	271 Merchants Square Dr	Carmel	IN	46032	Health/Fitness
19	CrossFit Indianapolis	1103 3rd Ave SW	Carmel	IN	46032	Health/Fitness
20	CycleBar Carmel	12697 N Pennsylvania St	Carmel	IN	46032	Health/Fitness
21	Fit Body Carmel	1021 W Main St	Carmel	IN	46032	Health/Fitness
22	Fitness by Design	598 W Carmel Dr	Carmel	IN	46032	Health/Fitness
23	Fitness Together	820 City Center Dr	Carmel	IN	46032	Health/Fitness
24	Fleece Fitness	604 W Main St Suite D	Carmel	IN	46032	Health/Fitness
25	Franciosi Fitness Performance Co.	13245 Aquamarine Drive	Carmel	IN	46033	Health/Fitness
26	Grandmaster Lee's TaekwonDo	13642 N Meridian St	Carmel	IN	46032	Health/Fitness
27	High Performance Martial Arts	1127 3rd Ave SW	Carmel	IN	46032	Health/Fitness
28	House of Martial Arts, LLC	14598 Clay Terrace Blvd #160	Carmel	IN	46032	Health/Fitness
29	Hubbard Training Systems	20 Executive Dr	Carmel	IN	46032	Health/Fitness
30	iLoveKickboxing	14570 River Rd	Carmel	IN	46033	Health/Fitness
31	Incycle	736 Hanover Place	Carmel	IN	46032	Health/Fitness
32	Indianapolis Brazilian Jiu-Jitsu Academy	1764 E 116th St	Carmel	IN	46032	Health/Fitness
33	Inner You	14400 Clay Terrace Blvd #160	Carmel	IN	46032	Health/Fitness
34	IronFit Boxing	620 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
35	Jazzercise	13642 N Meridian St	Carmel	IN	46032	Health/Fitness
36	LA Fitness	2744 E 146th St	Carmel	IN	46033	Health/Fitness
37	Motion4Life Fitness	14801 Market Center Drive Suite 100	Carmel	IN	46033	Health/Fitness
38	Orangetheory	4000 W 106th St #145	Carmel	IN	46032	Health/Fitness
39	Orangetheory Fitness	2438 E 146th St	Carmel	IN	46033	Health/Fitness
40	Paradise Personal Training	99 E Carmel Dr	Carmel	IN	46032	Health/Fitness
41	Pilates Center Indianapolis	176 E Carmel Dr	Carmel	IN	46032	Health/Fitness
42	Pilates of Carmel	75 Executive Dr	Carmel	IN	46032	Health/Fitness
43	Planet Fitness	2200 E 116th St	Carmel	IN	46032	Health/Fitness
44	Precision Health And Wellness	484 E Carmel Dr #186	Carmel	IN	46032	Health/Fitness
45	Pure Barre	726 Adams St Suite 130	Carmel	IN	46032	Health/Fitness
46	Pxp Endurance	1051 Summit Dr	Carmel	IN	46032	Health/Fitness
47	Reforming Indy Pilates Studio	12505 Old Meridian St	Carmel	IN	46032	Health/Fitness
48	Revel Fitness	1078 3rd Ave SW	Carmel	IN	46032	Health/Fitness
49	Solidcore Carmel	14311 Clay Terrace Blvd	Carmel	IN	46032	Health/Fitness
50	Studio Re LLC	225 E Carmel Dr	Carmel	IN	46032	Health/Fitness
51	Survival Fitness	12955 Old Meridian St #102	Carmel	IN	46032	Health/Fitness
52	The Bar Method Indianapolis Carmel	10425 Commerce Dr Suite 120	Carmel	IN	46032	Health/Fitness
53	The Exercise Coach - Carmel	110 W Main St Suite 180	Carmel	IN	46032	Health/Fitness
54	The Fitness Garage	1051 Summit Dr	Carmel	IN	46032	Health/Fitness
55	The HUB	620 S Rangeline Rd H	Carmel	IN	46032	Health/Fitness
56	The Next Step	720 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
57	The Yoga Studio	736 Hanover Place	Carmel	IN	46032	Health/Fitness
58	UFit North Fitness Studio	1119 S Rangeline Rd	Carmel	IN	46032	Health/Fitness
59	Cool Creek Park Nature Center	2000 E 151st St	Carmel	IN	46033	Park
60	Coxhall Gardens	11677 Towne Rd	Carmel	IN	46032	Park
61	Dr. James A. Dillon Park	6001 Edenshall Ln	Noblesville	IN	46060	Park
62	Liberty Park	16001 Westfield Blvd	Westfield	IN	46074	Park
63	Osborne Park	17001 Ditch Rd	Westfield	IN	46074	Park
64	Quaker Park	17501 Dartown Rd	Westfield	IN	46074	Park
65	Hoosier Futbol Club	6910 E 161st St	Noblesville	IN	46061	Soccer
66	Carmel Dad's Club	5459 E Main St	Carmel	IN	46033	Sports
67	Hollywood Sports Center	12345 Old Meridian St	Carmel	IN	46032	Sports
68	Spectrum Sports	138 W Carmel Dr	Carmel	IN	46032	Sports

Figure 56: CCPR Similar Provider List with Organization Information