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THE U.S. LEISURE MARKET

1.1 Expenditures on Leisure Activities

Richard K. Miller & Associates (RKMA, www.rkma.com) estimates the U.S. entertainment and leisure market at $3.40 trillion. For comparison: U.S. retail sales were $6.23 trillion in 2019, according to the U.S. Department of Commerce; sales at GAFO (general merchandise, apparel, furnishings, and other) stores were $1.30 trillion. National healthcare expenditures were $3.81 trillion in 2019, according to the Centers for Medicare & Medicaid Services.

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

- Adult entertainment: $ 26 billion
  (sources: *Forbes*, *U.S. News & World Report*, Associated Press)
- Amusement Parks: $ 19 billion
  (source: IBISWorld)
- Art: $ 28 billion
  (sources: UBS and Art Basal)
- Arts & crafts: $ 43 billion
  (sources: Association of Creative Industries)
- Bars and nightclubs: $ 22 billion
  (source: National Restaurant Association)
- Bicycles: $ 8 billion
  (source: National Bicycle Dealers Association)
- Bowling: $ 4 billion
  (source: IBISWorld)
- Camping: $ 5 billion
  (source: Outdoor Industry Association)
- Casino wagering: $ 77 billion
  (sources: American Gaming Association and National Indian Gaming Commission)
- Collecting: $ 70 billion
  (source: *Investors Business Daily*)
- Consumer books: $ 23 billion
  (sources: U.S. Department of Commerce)
- Consumer electronics: $401 billion
  (source: Consumer Electronics Association)
- Cultural, the not-for-profit arts industry: $135 billion
  (source: Americans for the Arts)

- Dining out (casual and fine dining only): $285 billion
  (source: National Restaurant Association)
- Drones: $ 1 billion
  (source: Consumer Technology Association)
- Equestrian: $102 billion
  (source: American Quarter Horse Association)
- Event caterering: $ 9 billion
  (sources: National Restaurant Association, Technomic)
- Fantasy sports: $ 7 billion
  (source: Fantasy Sports Trade Association)
- Festivals: $ 25 billion
  (source: International Festivals & Events Association)
- Fishing: $ 42 billion
  (source: U.S. Fish and Wildlife Service)
- Gardening: $ 48 billion
  (source: National Gardening Association)
- Golf: $ 69 billion
  (source: National Golf Foundation)
- Health and fitness clubs: $ 35 billion
  (source: International Health, Racquet & Sportsclub Association)
- Hunting: $ 26 billion
  (source: U.S. Fish and Wildlife Service)
- Lotteries: $ 35 billion
  (source: North American Association of State and Provincial Lotteries)
- Motorcycles: $ 18 billion
  (source: Packaged Facts)
- Museums: $ 21 billion
  (source: American Alliance of Museums)
- Music concerts: $ 9 billion
  (source: Pollstar)
- Musical instruments and products: $ 7 billion
  (source: *Music Trades*)
- Parks, city: $ 37 billion
  (source: National Recreation And Park Association)
- Parks, national: $ 12 billion
  (source: U.S. Park Service)
- Parks, state: $ 2 billion
  (source: National Association of State Park Directors)
- Pets: $ 96 billion
  (source: American Pet Products Association)
- Photography: $ 17 billion
  (sources: Photo Marketing Association, Bureau of Economic Analysis)
- Premium video (pay TV, mobile video, DVD, broadband video, and theater/box office receipts): $182 billion
  (source: iSuppli)
- Private clubs: $ 25 billion
  (source: IBISWorld)

- Radio (ad-supported, not direct consumer spending): $ 17 billion
  (source: Radio Advertising Bureau)
- Recreational boating: $122 billion
  (source: National Marine Manufacturers Association)
- Recreation vehicles: $ 21 billion
  (source: Recreation Vehicle Industry Association)
- Spas: $ 18 billion
  (source: International Spa Association, PricewaterhouseCoopers)
- Specialty auto accessories: $ 44 billion
  (source: Specialty Equipment Market Association)
- Spectator sports: $ 26 billion
  (source: *Sports Business Journal*)
- Sporting goods: $ 56 billion
  (source: Sporting Goods Manufacturers Association)
- Sports wagering: $ 2 billion
  (source: *Legal Sports Report*)
- Swimming pools: $ 9 billion
  (source: IBISWorld)
- Tailgating: $ 35 billion
  (source: Online Colleges)
- Television (ad-supported, not direct consumer spending): $ 68 billion
  (source: *Adweek*)
- Tennis: $ 4 billion
  (source: Tennis Industry Association)
- Travel and tourism (leisure travel only): $792 billion
  (source: Travel Industry Association)
- Video games: $ 42 billion
  (sources: NPD Group, Entertainment Software Association)
- Wildlife watching: $ 76 billion
  (source: U.S. Fish and Wildlife Service)
- Yoga: $ 12 billion
  (source: IBISWorld)
- Zoos and aquariums: $ 96 billion
  (source: American Zoo & Aquarium Association)

There is some overlap among the above expenditures. A few leisure activities are included in more than one category. This is somewhat offset by the fact that all types of leisure expenditures – hobby farming and wellness activities, for example – are not included in the list.

1.2 Time Spent With Leisure

The *American Time Use Survey* (ATUS, www.bls.gov/tus/), published June 2020 by the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor, assessed average daily time spent with leisure activities in 2019 as follows:

	All Ages 15+	Pct.	Active Participants
• Watching television:	2.81 hours	78%	3.61 hours
• Socializing and communicating:	0.64 hours	35%	1.83 hours
• Sports, recreation, and exercise:	0.31 hours	19%	1.59 hours
• Total:	4.86 hours	95%	5.12 hours

1.3 Top 10 Leisure Activities

The following were the Top 10 leisure activities in 2019:

Collecting

- Virtually everyone collects something. And for nearly every conceivable object, there are collectors. In 2019, 50 million collectors spent $70 billion purchasing items for their collections. Among the most popular collections: art, coins, dolls, and celebrity memorabilia.

Fitness Walking

- In 2019, 111 million Americans (ages six and older) walked as a fitness activity – walking ranked at #1 among all types of recreational activities.

Gardening

- Eighty million households, or 70% of all households, engaged in indoor/outdoor lawn and garden activities in 2019 and spent almost $48 billion in these activities.

Going to Movies

- Cinema box office attendance was approximately 1.2 billion in 2019; receipts were about $11 billion.

Going to the Beach

- When given a choice of destinations for leisure travel, 44% of adults pick one of America's 3,500 public beaches – this ranks #1 among all types of travel destinations.

Outdoor Activities in Public Parks

- Americans made 327 million visits to National Parks and 807 million visits to State Parks in 2019. Visits to city parks numbered in the trillions.

Reading

- Seventy-three percent (73%) of adults, or 153 million adults, read at least one book in 2019. Among those who read, the mean number of books read is 12. Women and seniors read the most.

Social Networking

- Among Internet users of all ages, 200 million people engaged in online social networking in 2019, spending an average of 1 hour and 15 minutes using social media.

Travel

- Americans took 1.9 billion trips for leisure in 2019 – spending an estimated $792 billion, which ranks it #1 in spending among all leisure activities. Over 40% of adults traveled on a summer vacation in 2019. Favorite activities for leisure travelers: dining out and shopping.

Watching Television

- There were 120.6 million TV homes in the U.S. for the 2019-2020 season. Adults and teens spent an average 2.8 hours each day watching television, with TV topping all media activities.

Other Popular Activities

- Over 40 million people participated in each of the following leisure activities in 2019:
  - Attended a college or professional sports event
  - Attended a fair or festival
  - Attended a music concert
  - Attended the theater/opera/symphony
  - Bicycled
  - Bowled
  - Exercised at a fitness club
  - Fished
  - Hiked and went camping
  - Hunted or went target shooting
  - Played a lottery
  - Played billiards/pool
  - Played video games
  - Visited a casino
  - Visited a museum
  - Visited a theme park
  - Visited a zoo or aquarium
  - Volunteered

1.4 Favorite Leisure Activities

The Harris Poll (www.theharrispoll.com) asked consumers what were their two or three favorite leisure-time activities. Responses by gender were as follows:

	Total	Female	Male
• Watching TV:	42%	42%	43%
• Reading:	37%	48%	24%
• Computer/Internet:	19%	18%	20%
• Time with family/friends:	18%	23%	13%
• Watching/going to movies:	11%	11%	11%
• Exercise/working out:	10%	10%	10%

• Video/computer games:	10%	8%	13%
• Walking/running/jogging:	8%	10%	7%
• Gardening:	7%	9%	5%
• Concerts/listening to/playing music:	7%	5%	10%
• Hobby-related activities:	5%	4%	5%
• Eating/going to restaurants:	4%	4%	4%
• Cooking/baking:	4%	5%	3%
• Sewing/needlework/quilting:	4%	7%	<1%
• Attending/watching sports events:	4%	2%	6%
• Shopping:	4%	6%	2%
• Sleeping/napping:	3%	4%	3%
• Relaxing/resting:	3%	2%	3%
• Fishing:	3%	2%	5%
• Crafts:	3%	5%	1%
• Swimming:	3%	3%	3%
• Golf:	3%	1%	7%
• Playing with pets:	3%	3%	2%

Responses by age were as follows:

	Total	18-to-36	37-to-48	49-to-67	68+
• Watching TV:	42%	38%	45%	42%	48%
• Reading:	37%	31%	35%	40%	42%
• Computer/Internet:	19%	16%	19%	21%	19%
• Time with family/friends:	18%	19%	19%	17%	20%
• Watching/going to movies:	11%	13%	13%	10%	5%
• Exercise/working out:	10%	13%	12%	7%	6%
• Video/computer games:	10%	16%	10%	8%	6%
• Walking/running/jogging:	8%	5%	11%	11%	7%
• Gardening:	7%	1%	4%	11%	14%
• Concerts/listening to/playing music:	7%	10%	9%	7%	2%
• Hobby-related activities:	5%	3%	1%	6%	9%
• Eating/going to restaurants:	4%	5%	3%	4%	7%
• Cooking/baking:	4%	5%	3%	4%	3%
• Sewing/needlework/quilting:	4%	2%	3%	6%	5%
• Attending/watching sports events:	4%	2%	5%	5%	2%
• Shopping:	4%	5%	7%	3%	2%
• Sleeping/napping:	3%	4%	4%	3%	1%
• Relaxing/resting:	3%	4%	3%	2%	1%
• Fishing:	3%	2%	4%	5%	2%
• Crafts:	3%	3%	3%	3%	4%
• Swimming:	3%	3%	1%	2%	6%
• Golf:	3%	3%	1%	4%	7%
• Playing with pets:	3%	3%	2%	2%	2%

1.5 Leisure Activities For Millennials

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

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

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THE EXPERIENCE ECONOMY

2.1 Overview

Harvard Business Review coined the term 'experience economy' in the late 1990s. Growth in spending for experiences now surpasses that of traditional retail.

According to Prof. Ryan Howell, Ph.D., of the Happiness Research Laboratory at San Francisco State University, experiences lead to longer-term satisfaction than shopping for merchandise. "Experiences provide memory capital," according to Prof. Howell. "You can still recall pleasant events today that happened in your life 10 or 20 years ago. We don't tend to get bored of happy memories like we do with a material object."

> **"The psychic center of American social life has shifted from buying things to experiencing them. In recent decades, a growing share of job growth and gross domestic product has come from the business of getting people together – from college sports and music festivals like Coachella to axe-throwing bars and ice cream museums."**
>
> *The New York Times*, 5/20/20

According to the Center for Generational Kinetics (CGK; www.genhq.com), 74% of Americans now prioritize experiences over products or things. Atop the list of experiences that people are saving for is travel. CGK found that 57% of people are currently saving money specifically for travel; 65% of Millennials are doing so.

2.2 Market Assessment

According to the Bureau of Economic Analysis (www.bea.gov), gross domestic product attributable to arts, entertainment, recreation, accommodations, dining out, and leisure travel was $1.6 trillion in 2019, up from $979 billion a decade ago.

Spending on experiences is increasing globally as well as in the U.S.

> **"Global spending on the so-called experience economy, which is being driven primarily by Millennial consumers, is expected to reach $8.2 trillion by 2028."**
>
> *The New York Times*, 1/25/19

2.3 Trends

According to The Harris Poll (www.theharrispoll.com), 72% of Millennials would rather spend on experiences than on material items.

Most unique about younger adults is not their desire for experiences but their disinterest in material possessions.

> **"Both Millennials and every other generation are opting out of accumulating stuff and exploring experiences instead. People young and old are opting for experiences over things. These markers of success are no longer as meaningful as they once were. And while young and old are both changing their buying habits, today we are focusing on Millennials."**
>
> *Forbes*, 1/2/19

Baby Boomers are also driving the Experience Economy. Many Boomer households have the financial resources and time to enjoy experiences.

2.4 Influence Of Social Media

Recent research found that 7 out of 10 Millennials experience FOMO (fear of missing out), driving Millennials' experiential appetite. Spending decisions, whether conscious or subconscious, are often brought upon by posts seen on social media, that some exciting event may be taking place elsewhere.

"In no coincidence, the experience economy burst into the mainstream in parallel with the rise of social media on-the-go. Everyone now has a camera in their pocket. In our mobile-first world, a photo can be enhanced within minutes of an experience unfolding and then can be shared and re-shared via a social network. This phenomenon perpetuates as we consume other's experiences and are forced to constantly compare and keep up. It is fun to see your family and friends happy and enjoying life, but nothing will get you to book a vacation faster than scrolling through your friends' photos on social media."

Inc., 10/31/19

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LEISURE & SOCIAL ACTIVITIES DURING THE PANDEMIC

3.1 Changes In Leisure And Social Activities

An April 2020 survey by The Harris Poll (www.theharrispoll.com) asked adults about anticipated changes in their leisure and social life after the pandemic is over and things have returned to normal. Responses were as follows:

- Mostly the same: 34%
- Somewhat different: 41%
- Very different: 25%

Responses by demographic were as follows:

	Mostly the Same	Somewhat Different	Very Different
Gender			
• Female:	34%	39%	27%
• Male:	33%	43%	24%
Age			
• 18-to-34:	31%	37%	32%
• 35-to-49:	29%	43%	28%
• 50-to-64:	39%	41%	19%
• 65 and older:	36%	43%	21%
Annual Income			
• Less than $50,000:	35%	37%	28%
• $50,000 to $75,000:	34%	40%	26%
• More than $75,000:	33%	43%	24%
Family			
• Parent:	33%	41%	26%
• No children:	35%	40%	26%
Region			
• Northeast:	33%	44%	23%
• South:	33%	39%	28%
• Midwest:	37%	40%	23%
• West:	33%	41%	26%

3.2 Missing Activities During Shutdown

Responses about how much they missed leisure and social activities during the coronavirus-related shutdown were as follows:

	A Lot/Somewhat	Not Very Much/Not At All
• Gatherings with friends and family:	74%	26%
• Dining out at restaurant/bar:	70%	30%
• Shopping in stores:	67%	33%
• Going to social gathering:	59%	41%
• Attending concerts/theatre/sports:	46%	54%
• Watching sports on TV:	45%	55%
• Going to movie theater:	44%	56%
• Going to a local coffeeshop:	43%	57%
• Going to gym/fitness class:	37%	63%

3.3 Attending Concerts/Theatre/Sports

By demographic, adults missed attending events such as concerts, theatre, and sports during the coronavirus-related shutdown as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	20%	23%	20%	37%
• Male:	23%	25%	20%	32%
Age				
• 18-to-34:	28%	24%	23%	25%
• 35-to-49:	23%	26%	18%	33%
• 50-to-64:	19%	22%	19%	30%
• 65 and older:	13%	35%	18%	44%
Annual Income				
• Less than $50,000:	15%	22%	17%	46%
• $50,000 to $75,000:	19%	21%	18%	41%
• More than $75,000:	26%	26%	22%	25%
Family				
• Parent:	23%	25%	19%	33%
• No children:	19%	23%	20%	38%
Region				
• Northeast:	23%	29%	19%	29%
• South:	19%	24%	19%	38%
• Midwest:	22%	20%	21%	37%
• West:	24%	23%	20%	33%
All Adults:	21%	24%	20%	35%

3.4 Dining Out At A Restaurant/Bar

By demographic, adults missed dining out at restaurants and bars during the coronavirus-related shutdown as follows:

	A Lot	Somewhat	Not Very Much	Not At All
Gender				
• Female:	36%	35%	14%	16%
• Male:	31%	39%	15%	16%
Age				
• 18-to-34:	38%	31%	18%	14%
• 35-to-49:	36%	35%	11%	18%
• 50-to-64:	28%	41%	12%	20%
• 65 and older:	31%	41%	16%	12%
Annual Income				
• Less than $50,000:	26%	34%	17%	22%
• $50,000 to $75,000:	30%	41%	13%	15%
• More than $75,000:	39%	36%	13%	11%
Family				
• Parent:	34%	35%	15%	16%
• No children:	32%	38%	14%	16%
Region				
• Northeast:	38%	35%	13%	14%
• South:	32%	39%	13%	17%
• Midwest:	32%	34%	16%	18%
• West:	33%	37%	16%	14%
All Adults:	33%	37%	14%	16%

3.5 Gatherings With Friends And Family

By demographic, adults missed gatherings with friends and family during the coronavirus-related shutdown as follows:

	A Lot	Somewhat	Not Very Much	Not At All
Gender				
• Female:	49%	27%	9%	15%
• Male:	33%	39%	14%	14%
Age				
• 18-to-34:	42%	28%	15%	15%
• 35-to-49:	37%	34%	11%	18%
• 50-to-64:	42%	37%	9%	13%
• 65 and older:	45%	34%	10%	12%

Annual Income				
• Less than $50,000:	38%	29%	14%	19%
• $50,000 to $75,000:	39%	41%	7%	13%
• More than $75,000:	45%	33%	11%	11%
Family				
• Parent:	43%	33%	10%	13%
• No children:	40%	32%	13%	16%
Region				
• Northeast:	44%	29%	14%	13%
• South:	40%	37%	10%	14%
• Midwest:	38%	34%	13%	14%
• West:				
All Adults:	41%	33%	11%	14%

3.6 Going To A Gym/Fitness Class

By demographic, adults missed going to a gym or fitness classes during the coronavirus-related shutdown as follows:

Gender	**A Lot**	**Somewhat**	**Not Very Much**	**Not At All**
• Female:	17%	17%	13%	53%
• Male:	17%	23%	16%	44%
Age				
• 18-to-34:	23%	28%	22%	27%
• 35-to-49:	18%	23%	16%	43%
• 50-to-64:	13%	13%	11%	63%
• 65 and older:	14%	12%	7%	67%
Annual Income				
• Less than $50,000:	11%	14%	15%	60%
• $50,000 to $75,000:	14%	19%	13%	54%
• More than $75,000:	22%	23%	15%	40%
Family				
• Parent:	19%	19%	14%	48%
• No children:	14%	21%	15%	50%
Region				
• Northeast:	19%	22%	16%	43%
• South:	16%	18%	17%	50%

• Midwest:	16%	18%	15%	51%
• West:	20%	21%	11%	49%
All Adults:	17%	20%	15%	49%

3.7 Going To A Local Coffeeshop

By demographic, adults missed going to their favorite coffeeshop during the coronavirus-related shutdown as follows:

Gender	**A Lot**	**Somewhat**	**Not Very Much**	**Not At All**
• Female:	20%	23%	14%	44%
• Male:	16%	27%	20%	37%
Age				
• 18-to-34:	25%	27%	21%	28%
• 35-to-49:	21%	27%	17%	35%
• 50-to-64:	11%	23%	17%	49%
• 65 and older:	13%	21%	12%	54%
Annual Income				
• Less than $50,000:	15%	21%	15%	49%
• $50,000 to $75,000:	15%	28%	14%	43%
• More than $75,000:	21%	26%	20%	34%
Family				
• Parent:	19%	24%	17%	40%
• No children:	17%	26%	17%	40%
Region				
• Northeast:	21%	28%	20%	31%
• South:	15%	27%	15%	43%
• Midwest:	16%	22%	16%	46%
• West:	21%	21%	20%	38%
All Adults:	18%	25%	17%	40%

3.8 Going To A Movie Theater

By demographic, adults missed going to a movie theater during the coronavirus-related shutdown as follows:

Gender	**A Lot**	**Somewhat**	**Not Very Much**	**Not At All**
• Female:	19%	23%	18%	39%
• Male:	20%	26%	18%	36%

Age				
• 18-to-34:	28%	26%	19%	27%
• 35-to-49:	22%	30%	17%	30%
• 50-to-64:	17%	24%	17%	42%
• 65 and older:	8%	17%	18%	58%
Annual Income				
• Less than $50,000:	14%	22%	17%	46%
• $50,000 to $75,000:	18%	25%	16%	41%
• More than $75,000:	24%	26%	18%	32%
Family				
• Parent:	20%	24%	19%	36%
• No children:	19%	25%	16%	40%
Region				
• Northeast:	26%	25%	18%	30%
• South:	17%	26%	18%	40%
• Midwest:	17%	23%	18%	42%
• West:	22%	23%	18%	37%
All Adults:	20%	25%	18%	38%

3.9 Going To Social Gatherings

By demographic, adults missed going to social gatherings during the coronavirus-related shutdown as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	30%	31%	16%	23%
• Male:	21%	37%	19%	23%
Age				
• 18-to-34:	33%	30%	18%	19%
• 35-to-49:	25%	36%	16%	22%
• 50-to-64:	19%	38%	17%	26%
• 65 and older:	22%	31%	19%	27%
Annual Income				
• Less than $50,000:	21%	28%	20%	30%
• $50,000 to $75,000:	25%	36%	12%	26%
• More than $75,000:	28%	37%	18%	17%

Family				
• Parent:	25%	35%	18%	22%
• No children:	25%	33%	17%	25%
Region				
• Northeast:	32%	31%	16%	21%
• South:	23%	35%	17%	25%
• Midwest:	22%	34%	21%	23%
• West:	28%	34%	17%	21%
All Adults:	25%	34%	18%	23%

3.10 Shopping in Retail Stores

By demographic, adults missed shopping in retail stores during the coronavirus-related shutdown as follows:

Gender	A Lot	Somewhat	Not Very Much	Not At All
• Female:	37%	34%	17%	13%
• Male:	25%	37%	23%	14%
Age				
• 18-to-34:	36%	31%	22%	11%
• 35-to-49:	35%	36%	16%	14%
• 50-to-64:	28%	37%	19%	16%
• 65 and older:	23%	39%	22%	15%
Annual Income				
• Less than $50,000:	29%	36%	20%	16%
• $50,000 to $75,000:	25%	42%	20%	13%
• More than $75,000:	34%	34%	20%	13%
Family				
• Parent:	32%	35%	20%	13%
• No children:	30%	36%	19%	15%
Region				
• Northeast:	35%	33%	21%	11%
• South:	32%	35%	20%	13%
• Midwest:	29%	36%	20%	16%
• West:	28%	37%	18%	16%
All Adults:	31%	36%	20%	14%

3.11 Watching Sports On TV

By demographic, adults missed watching sports on television during the coronavirus-related shutdown as follows:

Gender	**A Lot**	**Somewhat**	**Not Very Much**	**Not At All**
• Female:	17%	18%	16%	50%
• Male:	32%	25%	16%	28%
Age				
• 18-to-34:	24%	24%	19%	33%
• 35-to-49:	28%	21%	16%	35%
• 50-to-64:	25%	20%	14%	40%
• 65 and older:	18%	19%	12%	51%
Annual Income				
• Less than $50,000:	18%	19%	14%	48%
• $50,000 to $75,000:	23%	18%	9%	50%
• More than $75,000:	28%	24%	19%	29%
Family				
• Parent:	25%	21%	16%	38%
• No children:	22%	21%	15%	41%
Region				
• Northeast:	29%	21%	18%	32%
• South:	22%	23%	15%	40%
• Midwest:	23%	23%	16%	38%
• West:	25%	17%	14%	43%
All Adults:	24%	21%	16%	39%

48

INDOOR RECREATION

48.1 Axe Throwing

Long popular in lumberjack competitions in Canada and reinvented as an indoor league sport, axe throwing is becoming popular across the United States. The first U.S. throwing facility opened in 2013; there are now leagues in most major cities.

Detroit Axe, for example, offers 12 ax-throwing lanes along with 1,000 board games and a full-service restaurant, while Philadelphia-based Urban Axes, a BYOB arena dedicated to the sport, has more of an indoor skatepark feel.

Bad Axe Throwing (www.badaxethrowing.com) has 34 locations across the U.S. Urban Axes (www.urbanaxes.com) has arenas in eight cities.

> **"Urban axe throwing facilities popping up around the country. Think of them as an updated – and far hipper – version of the 1970s bowling alley."**
>
> NBC News

The International Axe Throwing Federation (IATF; www.iatf.com) was organized in 2016 to establish competitive rules, promote safety, and host competitions. IATF had over 4500 league members in 7 countries as of June 2020. Its leagues culminate in the IATF Championship, which awards the Wilson Cup and over $16,500 in prize money.

World Axe Throwing League (WATL; www.worldaxethrowingleague.com) was formed in 2017 to organize international competitions. As of June 2020, WATL had 175 member companies in 19 countries. Championships are broadcast on ESPN.

According to IATF, participants in axe throwing competitions had thrown over 51 million axes as of June 2020.

48.2 Billiards/Pool

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

According to the Sports & Fitness Industry Association (SFIA, www.sfia.org), 34.6 million people play billiards/pool at least once a year – 23.2 million are casual participants (<13 times per year) and 11.4 million are core participants (>13 times per year).

The American Poolplayers Association (APA, www.poolplayers.com), with 260,000 members, dubs itself the world's largest amateur pool league. At the national level, the APA guarantees more than $1 million in national tournament prize money. This consists of the $500,00 APA 8-Ball National Team Championships, the $250,000 APA 8-Ball Classic, the $100,000 APA 9-Ball National Team Championship, the $100,000 APA 9-Ball Shootout, and the MiniMania tournaments, which pays nearly $250,000 during National Team Championships, held in Las Vegas in August 2018.

According to IBISWorld (www.ibisworld.com), there are approximately 5,100 billiards and pool halls in the United States; combined revenue is $750 million.

A directory of pool halls and billiards parlors is available online at www.BilliardsFinder.com.

48.3 Bowling

According to the *2020 SFIA Participation Topline Report*, 45.4 million people bowl at least once a year – 36.2 million are casual participants (<13 times per year) and 9.2 million are core participants (>13 times per year).

According to the *Bowling Centers Industry Profile*, a February 2020 report by First Research (www.firstresearch.com), the U.S. bowling center industry includes about 3,700 centers with combined annual revenue of about $3 billion. Major companies include Brunswick Corporation, AMF Bowling Worldwide, and Bowl America. The industry is fragmented; the Top 50 companies generate about 30% of sales.

IBISWorld assesses the industry similarly, estimating there are 3,500 bowling centers in the United States; combined revenue is $4 billion.

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

Lucky Strike (www.bowlluckystrike.com), an 18-location chain, Bowl Mor (www.bowlmor.com), with 20 locations, and Splitsville (www.splitsvillelanes.com), with six locations, are spreading the concept of upscale bowling nationally.

Las Vegas has several luxury bowling venues co-located at casino resorts. Red Rock Lanes (www.redrocklanes.com), at the Red Rock Casino Resort Spa, for example, has 72 lanes, private VIP lanes ($3,000 to $5,000), video games embedded into bar tops, and a lounge with bottle service.

48.4 Darts

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

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

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

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

48.5 Family Entertainment Centers

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

The following are games and activities typically found at FECs:

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

IBISWorld estimates the number of family entertainment centers and annual revenue as follows:

	Number	Annual Revenue
• Game-focused family entertainment centers including video game arcades:	8,358	$3.0 billion
• Paintball fields:	1,828	$1.0 billion
• Laser tag arenas:	1,200	$ 461 million

The following are the largest FEC operators:

- Adventure Landing (www.adventurelanding.com)
- Boomers! Parks (www.boomersparks.com)
- Chuck E. Cheese's (www.chuckecheese.com)
- Dave & Buster's (www.daveandbusters.com)
- GameWorks (www.gameworks.com)
- Golfland (www.golfland.com)

- Legoland Discovery Center (www.legolanddiscoverycenter.com)
- Malibu Grand Prix (www.malibugrandprix.com)
- Putt Putt Fun Center (www.puttputt.com)
- Scandia Amusements (www.scandiafun.com)

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

48.6 Indoor Skydiving

Indoor skydiving is an activity where participants fly within a column of wind created by a vertical wind tunnel. Participants wear a jumpsuit, goggles, a helmet, eye protection, and earplugs.

As of June 2020, there were 64 sky diving wind tunnels in the U.S., according to The Indoor Skydiving Source (www.indoorskydivingsource.com/tunnels/usa/). iFLY (www.iflyworld.com) operates 40 of the facilities.

U.S. Indoor Skydiving (USIS; www.usindoorskydiving.com/) hosts the annual USIS Indoor Skydiving Open National Championship.

World Air Sports Federation (FAI; www.fai.org) hosts the annual FAI World Cup of Indoor Skydiving.

48.7 Indoor Trampoline Parks

According to Forbes, there are more than 600 indoor trampoline parks in the U.S., with total annual revenue of $1.2 billion. There are approximately 100 million annual visits to the parks.

The largest park operators are Sky Zone, with 176 locations, and CircusTrix, with 80 parks.

48.8 Table Tennis

According to SFIA, 15.0 million people played table tennis, or ping pong, at least once in 2019 – 10.7 million are casual participants (<13 times per year) and 4.2 million are core participants (>13 times per year).

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

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

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

48.9 Market Resources

American Darts Organization, P.O. Box 182, Loveland, OH 45140. (844) 883-2787. (www.adodarts.com)

Arcade, Food & Entertainment Complexes in the U.S., IBISWorld, March 2020. (www.ibisworld.com/united-states/market-research-reports/arcade-food-entertainment-complexes-industry/)

American Poolplayers Association, 1000 Lake Saint Louis Boulevard, Suite 325, Lake Saint Louis, MO 63367. (636) 625-8611. (www.poolplayers.com)

Bowling Centers in the U.S., IBISWorld, February 2020. (www.ibisworld.com/united-states/market-research-reports/bowling-centers-industry/)

Bowling Centers Industry Profile, First Research, February 2020. (www.firstresearch.com/Industry-Research/Bowling-Centers.html)

Laser Tag Operators Association, 21441 Pacific Boulevard, Suite 200, Sterling, VA 20166. (703) 766-1480. (www.lasertagoperatorsassociation.org)

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

Sports & Fitness Industry Association (SFIA), 962 Wayne Avenue, Suite 300, Silver Spring, MD 20910. (301) 495-6321. (www.sfia.org)

49

LOTTERIES

49.1 Market Assessment

Forty-five jurisdictions (i.e., 44 states and the District of Columbia) operate lotteries. The following states do not operate lotteries:

- Alabama
- Alaska
- Hawaii
- Mississippi
- Nevada
- Utah

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

- FY2013: $68.68 billion
- FY2014: $71.13 billion
- FY2015: $73.87 billion
- FY2016: $80.55 billion
- FY2017: $80.38 billion
- FY2018: $77.69 billion
- FY2019: $83.05 billion

In FY2019, lottery sales were distributed as follows:

- Winnings returned to players: $47.92 billion (57.7% of total)
- Transferred to beneficiaries: $23.09 billion (27.8% of total)
- Lottery operational expenses: $12.12 billion (14.6% of total)

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

49.2 Types of Games

By type of game, traditional lottery spending in FY2019 was as follows:

- Instants: $52.05 billion (5.3%)
- Daily numbers (2-5 digits): $10.85 billion (3.1%)
- Mega Millions: $ 5.30 billion (63.6%)

- Powerball: $ 4.92 billion (-2.3%)
- Monitor games: $ 4.71 billion (7.3%)
- All other lotto games: $ 3.62 billion (3.1%)
- Terminal-based instant games: $ 560 million (1.6%)
- For Life games: $ 459 million (-3.3%)
- Pulltabs: $ 226 million (17.0%)
- Lotto America: $ 73.8 million (7.3%)
- Daily keno: $ 62.4 million (1.0%)
- Raffles: $ 37.5 million (40.5%)
- Hybrid instant/draw games: $ 34.1 million (15.5%)
- All other games: $ 120.1 million (12.4%)

49.3 State-by-State Assessment

The following are FY2019 traditional lottery sales for each state (change from previous year in parenthesis):

- Arizona: $1.07 billion (9.7%)
- Arkansas: $ 515 million (3.2%)
- California: $7.38 billion (6.1%)
- Colorado: $ 679 million (11.1%)
- Connecticut: $1.33 billion (5.2%)
- Delaware: $ 196 million (11.0%)
- District of Columbia: $ 213 million (1.3%)
- Florida: $7.15 billion (6.7%)
- Georgia: $4.77 billion (3.9%)
- Idaho: $ 287 million (8.6%)
- Illinois: $2.97 billion (1.7%)
- Indiana: $1.34 billion (6.1%)
- Iowa: $ 390 million (5.4%)
- Kansas: $ 295 million (9.8%)
- Kentucky: $1.12 billion (8.4%)
- Louisiana: $ 523 million (6.7%)
- Maine: $ 299 million (1.8%)
- Maryland: $2.19 billion (7.5%)
- Massachusetts: $5.49 billion (4.0%)
- Michigan: $3.88 billion (8.6%)
- Minnesota: $ 636 million (6.8%)
- Missouri: $1.46 billion (4.7%)
- Montana: $ 61 million (8.2%)
- Nebraska: $ 192 million (4.8%)
- New Hampshire: $ 384 million (15.5%)
- New Jersey: $3.48 billion (5.5%)
- New Mexico: $ 143 million (7.2%)
- New York: $8.20 billion (3.4%)

- North Carolina: $2.85 billion (9.8%)
- North Dakota: $ 35 million (12.9%)
- Ohio: $3.36 billion (6.3%)
- Oklahoma: $ 241 million (9.3%)
- Oregon: $ 380 million (3.2%)
- Pennsylvania: $4.88 billion (15.7%)
- Rhode Island: $ 263 million (1.9%)
- South Carolina: $1.98 billion (13.2%)
- South Dakota: $ 62 million (8.3%)
- Tennessee: $1.81 billion (4.4%)
- Texas: $6.25 1 billion (1.1%)
- Vermont: $ 139 million (5.2%)
- Virginia: $2.29 billion (7.2%)
- Washington: $ 803 million (9.4%)
- West Virginia: $ 200 million (13.0%)
- Wisconsin: $ 713 million (6.9%)
- Wyoming: $ 36 million (28.5%)

49.4 Market Resources

North American Association of State and Provincial Lotteries, 7470 Auburn Road, Suite LL1, Concord, OH 44077. (440) 361-7962. (www.naspl.org)