

## INDOOR RECREATION

### **42.1 Billiards/Pool**

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

According to the Sports & Fitness Industry Association (SFIA, [www.sfia.org](http://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](http://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 \$500,000 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](http://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](http://www.BilliardsFinder.com).

### **42.2 Bowling**

According to the *2018 SFIA Participation Topline Report*, 45.5 million people bowl at least once a year – 35.9 million are casual participants (<13 times per year) and 9.6 million are core participants (>13 times per year).

According to the *Bowling Centers Industry Profile*, an April 2018 report by First Research ([www.firstresearch.com](http://www.firstresearch.com)), the U.S. bowling center industry includes about 3,800 centers with combined annual revenue of about \$4 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 3,696 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.

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

*USA Today*

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Lucky Strike ([www.bowlluckystrike.com](http://www.bowlluckystrike.com)), an 18-location chain, Bowl Mor ([www.bowlmor.com](http://www.bowlmor.com)), with 20 locations, and Splitsville ([www.splitsvillelanes.com](http://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](http://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.

### **42.3 Darts**

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

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

The American Darts Organization (ADO, [www.adodarts.com](http://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.

### **42.4 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:	6,287	\$1.0 billion
• Paintball fields:	1,176	\$ 605 million
• Laser tag arenas:	877	\$ 247 million

The following are the largest FEC operators:

- Adventure Landing ([www.adventurelanding.com](http://www.adventurelanding.com))
- Boomers! Parks ([www.boomersparks.com](http://www.boomersparks.com))
- Chuck E. Cheese's ([www.chuckecheese.com](http://www.chuckecheese.com))
- Dave & Buster's ([www.daveandbusters.com](http://www.daveandbusters.com))
- GameWorks ([www.gameworks.com](http://www.gameworks.com))
- GolfLand ([www.golfland.com](http://www.golfland.com))
- Legoland Discovery Center ([www.legolanddiscoverycenter.com](http://www.legolanddiscoverycenter.com))
- Malibu Grand Prix ([www.malibugrandprix.com](http://www.malibugrandprix.com))
- Putt Putt Fun Center ([www.puttputt.com](http://www.puttputt.com))
- Scandia Amusements ([www.scandiafun.com](http://www.scandiafun.com))

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

## **42.5 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 were approximately 100 million visits to the parks in 2017.

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

## **42.6 Table Tennis**

According to SFIA, 16.0 million people play table tennis, or ping pong, at least once in 2017 – 11.8 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](http://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](http://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](http://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](http://www.joolateams.com)).

## **42.7 Market Resources**

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

*Arcade, Food & Entertainment Complexes in the U.S.*, IBISWorld, May 2017. ([www.ibisworld.com/industry/default.aspx?indid=1647](http://www.ibisworld.com/industry/default.aspx?indid=1647))

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

*Bowling Centers in the U.S.*, IBISWorld, December 2017. ([www.ibisworld.com/industry/default.aspx?indid=1656](http://www.ibisworld.com/industry/default.aspx?indid=1656))

*Bowling Centers Industry Profile*, First Research, April 2018. ([www.firstresearch.com/Industry-Research/Bowling-Centers.html](http://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](http://www.lasertagoperatorsassociation.org))

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

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

## LIFESTYLE COMMUNITIES

### **43.1 Golf Communities**

The traditional golf paradigm – living in a non-descript neighborhood and pursuing the game at local private or public courses – is still most common, especially in the nation’s northern tier. But across the Sun Belt, from the coastal Carolinas and Florida to Southern California, as well as up the Pacific Coast and even into the western mountains, master-planned golf communities are more prevalent. These communities draw not just locals, but also passionate golfers from elsewhere in search of second homes and places to retire.

The first wave of golf communities were developed in the late-1970s and early-1980s. During the past two decades, over 2,500 golf communities have been developed throughout the United States.

When developers were putting up the first golf communities in Florida and the Carolinas, the best buyers might hope for was cookie-cutter fairways squeezed between bland condos. But since the early 1990s, communities have been offering a myriad of amenities along with a sense of endless vacation. In addition to ever higher-quality golf, some communities even dole out perks such as concierge service and access to private jets. Others hire full-time master chefs and nature guides. Spas, horseback riding, hiking-trail networks, marinas, and planned activities for both kids and adults are common.

According to the National Golf Foundation ([www.ngf.org](http://www.ngf.org)), the states with the most golf communities are as follows:

- Florida
- California
- Texas
- North Carolina
- Arizona
- South Carolina
- Georgia
- Michigan

### **43.2 Retirement Communities**

According to a June 2017 report by IBISWorld ([www.ibisworld.com](http://www.ibisworld.com)), there are 46,049 retirement communities in the U.S.; annual revenue is \$66 billion.

Within the category of retirement communities are a wide spectrum of options. At the high end of the category are Planned Leisure-Oriented Retirement Communities, often referred to as Active Adult Communities. The following are examples:

**On Top of the World** (Ocala, FL; [www.ontopoftheworldcommunities.com](http://www.ontopoftheworldcommunities.com))

- With approximately 10,000 homes, On Top of the World is one of the largest 55+ communities in the U.S. The community offers virtually every recreational activity imaginable: a fitness center & spa, four 18-hole golf courses, six tennis courts, basketball courts, indoor racquetball courts, a softball field, and more. Over 15 miles of walking trails wind throughout the community. There are learning classes on topics ranging from traveling and photography to theatrical groups and dancing. An 800-seat cultural center hosts concerts and theater productions. Over 200 organized clubs provide camaraderie among residents with similar interests.

**Sun City** (several locations; [www.delwebb.com](http://www.delwebb.com))

- Developed in 1960 by Del Webb Company, Sun City Arizona was the first leisure-focused retirement community and a model for subsequent communities. There are now 18 Sun City communities in 10 states; all provide a plethora of leisure amenities. Sun City Hilton Head (South Carolina), for example, has four swimming pools, two fitness centers, 10 tennis courts, 54 holes of golf, a grand social hall, and a performing arts center. Sun City Palm Desert (California) includes indoor lap pools, two championship golf courses and three clubhouses with fitness centers, spas, a library, a 200-seat auditorium, an aerobics and dance studio, card rooms, a billiards hall, and bocce ball courts.

**The Villages** (Sumpter County, FL; [www.thevillages.com](http://www.thevillages.com))

- With over 55,000 residents, The Villages is the largest retirement community in the world. The community has 32 golf courses, 53 pools, and 17 recreation centers, each with bocce courts, horseshoes, shuffleboard, and more.

**Westlake Golf & Country Club** (Jackson, NJ; <http://home.my-westlake.com>)

- The hub of West Lake is an 18-hole championship golf course. When not golfing, residents can play tennis or make use of various sports courts, which include bocce ball, volleyball, and shuffleboard courts. There are also both indoor and outdoor swimming pools. Special interest clubs include those devoted to birdwatching, gardening, dancing, water color painting, bowling, computers, and wine tasting.

### **43.3 Spa Communities**

With the popularity of spas, particularly among the wealthy, it is not surprising that the concept of living at a 365-day-a-year spa appeals to many.

Canyon Ranch ([www.canyonranch.com](http://www.canyonranch.com)), the famed spa located outside Tucson, opened its first residential development in Miami Beach in 2010 to appeal to this market. And in Tucson, Canyon Ranch developed homesites on a 30-acre parcel

adjacent to its original spa complex, creating a community focused on renewal and healing. In 2016, the company announced the launch of Canyon Ranch Residences at its 120-acre Lenox, Massachusetts, location. Located on the grounds of the historic Bellefontaine Mansion in the heart of the Berkshires, the development will be comprised of 19 luxury condos ranging in price from \$1.4 million to \$3.6 million.

Miraval ([www.miravalresorts.com](http://www.miravalresorts.com)), another Arizona-based spa, brought the spa community concept to its Tucson location with luxury residences that include with ownership more than 100 programs of exercise, meditation, education, and creative arts, plus an array of grooming and wellness services.

## LOTTERIES

### **44.1 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](http://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

In FY2017, lottery sales were distributed as follows:

- Winnings returned to players: \$46.37 billion (57.7%)
- Transferred to beneficiaries: \$22.31 billion (27.8%)
- Lottery operational expenses: \$11.70 billion (14.6%)

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

### **44.2 Types of Games**

By type of game, lottery spending in FY2017 was as follows:

- Instant games: \$46.48 billion (2.8%)
- Daily numbers: \$10.38 billion (1.3%)
- Electronic gaming machines (net): \$ 6.65 billion (3.2%)
- Powerball: \$ 4.59 billion (-30.3%)
- Monitor games: \$ 4.13 billion (4.4%)



- All other lotto games: \$ 3.57 billion (-1.7%)
- Mega Millions: \$ 2.32 billion (-7.0%)
- Table games (net): \$ 769 million (22.5%)
- For Life games: \$ 447 million (9.6%)
- Terminal-based instant games: \$ 411 million (33.6%)
- Pulltabs: \$ 209 million (23.0%)
- Hot Lotto: \$ 74 million (1.9%)
- Raffles: \$ 69 million (-10.9%)
- Daily keno: \$ 63 million (-3.0%)
- Hybrid instant/draw games: \$ 57 million (12.0%)
- All other games: \$ 163 million (-6.9%)

### **44.3 State-by-State Assessment**

The following are FY2017 lottery sales for each state (change from previous year in parenthesis):

- Arizona: \$ 852 million (-2.2%)
- Arkansas: \$ 449 million (-1.4%)
- California: \$6.23 billion (-0.7%)
- Colorado: \$ 555 million (-6.6%)
- Connecticut: \$1.22 billion (-1.2%)
- Delaware: \$ 624 million (-1.2%)
- District of Columbia: \$ 218 million (-4.1%)
- Florida: \$6.16 billion (1.6%)
- Georgia: \$4.23 billion (-0.6%)
- Idaho: \$ 240 million (1.6%)
- Illinois: \$2.85 billion (-0.5%)
- Indiana: \$1.21 billion (0.5%)
- Iowa: \$ 352 million (-0.4%)
- Kansas: \$ 258 million (-5.1%)
- Kentucky: \$1.00 billion (0.3%)
- Louisiana: \$ 455 million (-10.3%)
- Maine: \$ 266 million (-2.3%)
- Maryland: \$3.35 billion (9.9%)
- Massachusetts: \$5.08 billion (-2.6%)
- Michigan: \$3.33 billion (7.3%)
- Minnesota: \$ 563 million (-5.0%)
- Missouri: \$1.34 billion (2.1%)
- Montana: \$ 52 million (-12.1%)
- Nebraska: \$ 174 million (-3.2%)
- New Hampshire: \$ 299 million (-1.4%)
- New Jersey: \$3.17 billion (-3.1%)
- New Mexico: \$ 126 million (-18.3%)
- New York: \$9.68 billion (-0.2%)

- North Carolina: \$2.43 billion (1.9%)
- North Dakota: \$ 27 million (-22.5%)
- Ohio: \$3.93 billion (no change)
- Oklahoma: \$ 151 million (-20.1%)
- Oregon: \$1.25 billion (1.4%)
- Pennsylvania: \$4.00 billion (-3.2%)
- Rhode Island: \$ 872 million (-0.3%)
- South Carolina: \$1.64 billion (2.2%)
- South Dakota: \$ 261 million (-0.5%)
- Tennessee: \$1.61 billion (-0.9%)
- Texas: \$5.08 billion (0.2%)
- Vermont: \$ 122 million (-1.5%)
- Virginia: \$1.99 billion (-0.8%)
- Washington: \$ 673 million (-3.1%)
- West Virginia: \$1.08 billion (-5.0%)
- Wisconsin: \$ 603 million (-3.9%)
- Wyoming: \$ 25 million (-24.0%)

#### **44.4 Market Resources**

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

## MODEL RAILROADS

### **45.1 Overview**

There are a half million model railroaders and toy train hobbyists in the U.S., according to the Train Collectors Association ([www.traincollectors.org](http://www.traincollectors.org)).

*Model Railroad News* estimates the number higher, at one million model railroaders nationwide. That includes everyone from serious enthusiasts to those who get out their train once a year to run it around the Christmas tree.

*Model Railroad News* estimates spending on model trains at \$400 million annually.

Model trains are traditionally built from scratch and can take months to construct. Several manufacturers have begun selling trains and cars that need no assembly, easing the barrier to entry for novice hobbyists.

An increasingly popular activity is garden railroading, a hobby which integrates model railroads into an outdoor garden environment.

### **45.2 Model Railroad Clubs**

Most serious model railroaders belong to one of the more than 100 model railroad clubs across the United States. The following are among the more prominent clubs:

- Arizona Model Railroading Society (Phoenix, AZ; [www.azmodelrr.com](http://www.azmodelrr.com))
- East Penn Traction Club (Philadelphia, PA; [www.eastpenn.org](http://www.eastpenn.org))
- Elmhurst Model Railroad Club (Elmhurst, IL; [www.emrrc.org](http://www.emrrc.org))
- First State Model Railroad Club (Dover, DE; [www.fsmrrc.com](http://www.fsmrrc.com))
- Golden Empire Historical & Modeling Society (Bakersfield, CA; [www.gehams.org](http://www.gehams.org))
- Highland Park Society of Model Railroad Engineers (San Gabriel, CA; [www.highlandpacificrr.com](http://www.highlandpacificrr.com))
- Lansing Model Railroad Club (Lansing, MI; [www.lmrc.org](http://www.lmrc.org))
- Napa Valley Model Railroad Historical Society (Napa, CA; [www.nvmrc.org](http://www.nvmrc.org))
- New York Society of Model Engineers (Carlstadt, NJ; <http://modelengineers.org>)
- Pasadena Model Railroad Club (Los Angeles, CA; [www.pmrrc.org](http://www.pmrrc.org))
- Piedmont-Triad Model Railroaders Club (Winston-Salem, NC; [www.piedmonttriadmodelrailroadersclub.com](http://www.piedmonttriadmodelrailroadersclub.com))
- Railroad Model and Historical Society of Southeastern Ohio (Marion, OH; [www.ironheadsofseo.org](http://www.ironheadsofseo.org))

- San Antonio Model Railroad Association (San Antonio, TX; [www.samratx.org](http://www.samratx.org))
- San Diego Society of N Scale (San Diego, CA; [www.sdsons.org](http://www.sdsons.org))
- Tech Model Railroad Club (Cambridge, MA; <http://tmrc.mit.edu>)
- The Model Railroad Club (Union, NJ; <http://tmrci.org>)
- Utah Society of Railroad Modelers (Salt Lake City, UT; <http://utahsocietyofrailroadmodelers.blogspot.com>)

### **45.3 Model Railroad Museums**

Several specialized museums are dedicated to model railroads. The following are among the largest:

- Bay State Model Railroad Museum (Roslindale, MA; [www.bsmrm.org](http://www.bsmrm.org))
- Friar Model Railroad Museum (Sparta, NJ; [www.fmrm.com](http://www.fmrm.com))
- Golden State Model Railroad Museum (Point Richmond, CA; [www.gsmrm.org](http://www.gsmrm.org))
- Hartman Model Railroad Museum (Intervail, NH; [www.hartmannrr.com](http://www.hartmannrr.com))
- San Diego Model Railroad Museum (San Diego, CA; [www.sdmrm.org](http://www.sdmrm.org))
- Twin City Model Railroad Museum (Saint Paul, MN; [www.tcmrm.org](http://www.tcmrm.org))
- Western Pennsylvania Model Railroad Museum (Gibsonia, PA; [www.wpmrm.org](http://www.wpmrm.org))
- Western Reserve Model Railroad Museum (Mentor, OH; [www.facebook.com/The-Western-Reserve-Model-Railroad-Museum-151442708224945/](http://www.facebook.com/The-Western-Reserve-Model-Railroad-Museum-151442708224945/))

### **45.4 The National Train Show**

The 27<sup>th</sup> annual National Train Show, held August 10-18, 2018 in Kansas City, Missouri, and sponsored by the National Model Railroad Association ([www.nmra.org](http://www.nmra.org)), drew over 20,000 people.

### **45.5 Market Resources**

National Model Railroad Association, P.O. Box 1328, Soddy Daisy, TN 37384.  
(423) 892-2846. ([www.nmra.org](http://www.nmra.org))

Train Collectors Association, 300 Paradise Lane, Ronks, PA 17572. (717) 687-8623.  
([www.traincollectors.org](http://www.traincollectors.org))