

SPORTS, FITNESS AND RECREATION PARTICIPATION – OVERVIEW REPORT



2010

The Physical Activity Council



A research project in the USA tracking sports, fitness and recreation participation. This overview report covers the total participation numbers in 117 different sports during the calendar year 2009.

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1 METHOD

This Overview Report is produced by a partnership of seven of the major governing body and trade associations in US sports and leisure. Each partner produces more detailed reports on their specific areas of interest but the Overview Report summarizes and trends “topline” data about levels of activity. The overall aim of this report is to establish levels of activity and identify key trends in sports, fitness and recreation participation in the USA. For more detailed results, please contact the relevant partner, listed below.

During January 2010/early February 2010 a total of 40,141 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate. A total of 15,067 individual and 25,074 household surveys were completed. The total panel has over 1 million members and is maintained to be representative of the US population. Over sampling of ethnic groups took place to boost response from typically under responding groups.

A weighting technique was used to balance the data to reflect the total US population aged 6 and above. The following variables were used: gender, age, income, household size, region, and population density. The total population figure used was 281,658,000 people aged 6 and above.

The 2010 participation survey sample size of 41,141 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error—that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. A sport with a participation rate of 5% has a confidence interval of plus or minus 0.21 percentage points at the 95% confidence level. This translates to plus or minus 4% of participants.

For more information on the following activities please contact:

- GOLF: The National Golf Foundation www.ngf.org P: 561.744.6006
- SNOWSPORTS (Alpine, X-Country, Freestyle, Snowboarding, and Telemark): The Snowsports Industries America www.snowsports.org P: 703.556.9020
- OUTDOOR (Bird Watching, Camping, Climbing, Fishing Wildlife Viewing, Hiking Day, Canoeing, Kayaking, Mountain Biking, Trail Running and Watersports) The Outdoor Foundation www.outdoorfoundation.org P: 202.271.3252
- TENNIS: The Tennis Industry Association www.tennisindustry.org P: 843.686.3036
- CLUB/INSTITUTIONAL FITNESS: IHRSA <http://cms.ihrsa.org> P: 617.316.6773
- TEAM SPORTS / INDIVIDUAL SPORTS / GENERAL FITNESS / WATERSPORTS: The SGMA www.sgma.com P: 301.495.6321

2 MAIN FINDINGS

The main findings within this Overview Report are as follows:

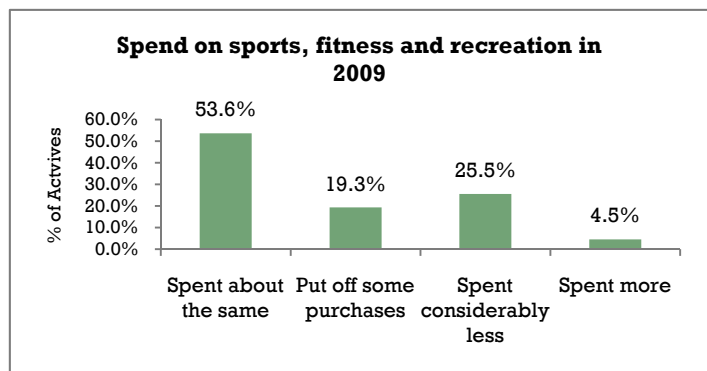
Overall Activity Levels

- The PAC survey measures participation in 117 sports fitness and recreation activities. 77% of Americans age 6 and over took part in at least one activity (217.0 million people). This leaves 64.6 million people who are inactive according to even this broadest definition of activity.
- To gain a better perspective on physical activity, we allocated a “calories burned” measure to each of the 117 different activities. So for example, High Impact Aerobics, Cardio Kickboxing, Ice Hockey were defined as “High Calorie” sports. Golf and Softball were defined as “Medium Calorie.” Birdwatching and Fishing were defined as “Low Calorie.” Around 151 million Americans took part in at least 1 high calorie activity. This number drops to 78 million frequent participants in high calorie activities – only 28% of the population.
- In fact over 50% of Americans take part in no activities at all or are infrequent participants (see table below in blue).

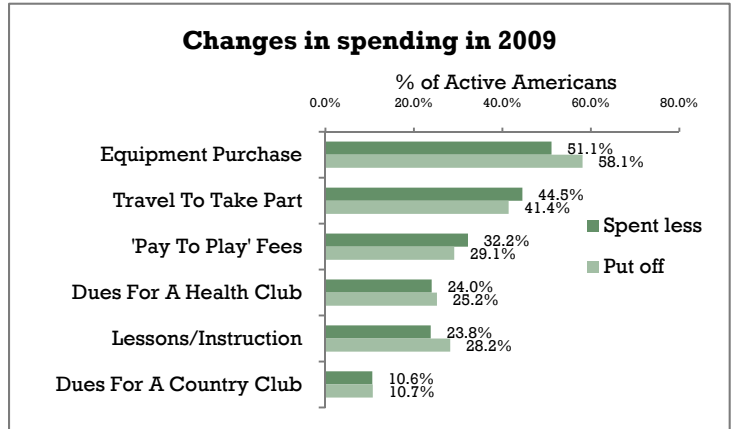
All Americans	281,658,000	100.0%
High Calorie Activity – Frequent Participants	78,642,000	27.9%
Medium Calorie Activity – Frequent Participants	25,595,000	9.1%
Low Calorie Activity - Frequent Participants	20,417,000	7.2%
Infrequent Participants	92,364,000	32.8%
None	64,640,000	22.9%

Overall impact of the economy

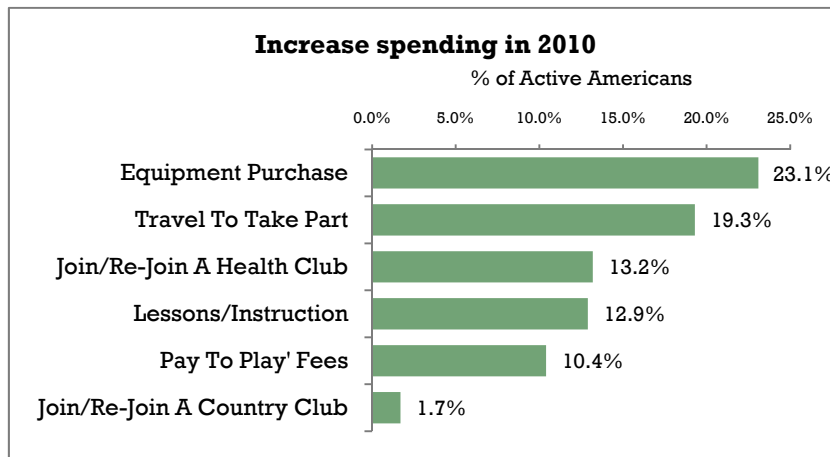
- The economy in 2009 had a major impact on spending on sports, fitness and recreation. Only 4.5% of active participants said they had spent more than in 2008. A quarter of actives had spent considerably less (note: % of actives = those Americans age 6+ who took part in at least 1 of the 117 activities)



- Of those who had spent less, over half had spent less on equipment, closely followed by reduced spend on travel. There was a similar picture for spending that had been postponed.



- Looking forward, there are positive signs for 2010 with significant numbers of active participants set to increase spending. The leading increase is for equipment, followed by travel.



There are a number of key findings for each of the Physical Activity Council members:

Fitness activities and equipment exercise (IHRSA and SGMA)

- Innovation in heavy cardio equipment has led to increases in participation for some of the major activities such as elliptical motion trainers (up 4.9% in the last year), treadmills (up 4.1%), stationary cycling (up 2.0%).
- Consumers in 2009 engaged in socially based exercise activities at their health clubs. This led to increases for class oriented activities such as aerobics high impact (up 8.1%), aerobics low impact (up 6.3%) and aerobics step (4.5%).
- Training with free weights continues to increase with barbells (up 3.5%), dumbbells (up 3.9%) and hand weights (up 6.8%) all showing good growth. Dumbbell and hand weights have now increase over 30% since the year 2000.

Walking/Running/Bicycling/Swimming (SGMA and Outdoor Foundation)

- Running participation continued to increase, up 6.7% to 43.8 million. Consumers in a tough economy are clearly looking for value. Running has a number of advantages as an activity: inexpensive, can be done close to home, no membership required, it's time flexible and a partner isn't required.
- While "value" is important there are a number of niche sports that are increasing quickly from a small base such as adventure racing and triathlon which have a strong core of committed enthusiasts. Both forms of triathlon (traditional and non-traditional) and adventure racing had double digit increases.
- Although mountain biking shows a slight decrease, road cycling increased 5.3% to 40.1 million again illustrating the advantages of sports that are time flexible and can be done close to home.

Golf (National Golf Foundation)

- Golf remains one of the top individual sports with 27.1 million participants in 2009, 15.3 million of whom play frequently (eight or more times a year).
- Participation in golf has been relatively flat since the late 1990s and has been quite resilient given two recessions in the past decade.
- A drop in the number of golfers was recorded in 2009 (down 5.1% from 2008) due mainly to "churn" – those who tried the game and quit, plus golfers lost due to mortality, infirmity or taking a hiatus. Meanwhile, 1.7 million beginners played golf for the first time in 2009 and 2.0 million former golfers returned to the game.

Outdoor Activities (Outdoor Foundation)

- Participation in "core" outdoor sports and activities increased 3.3% from 97.5 million to 100.7 million Americans ages 6 and above.
- Camping continues to be strong as it can represent a cost effective activity or vacation for the whole family.
- In a tough economy, activities that can be "done in a day" fulfill the needs of participants to help keep costs down and fit in with busy schedules. Hiking has remained strong through 2009 with 32.6 million participants.

Fishing/Hunting (SGMA and Outdoor Foundation)

- The challenging economy in 2009 impacted fly fishing and saltwater fishing which tend to be more expensive "destination" forms of fishing. Freshwater fishing tends to be lower cost so managed a 1.8% increase in the year with 40.9 million participants.
- Hunting (handgun) and hunting (shotgun) both showed declines but bow hunting and rifle hunting increased in 2009.

Team Sports (SGMA)

- Traditional team sports generally showed declines in 2009 highlighting the lack of opportunity and resources in a tough economic and some cutbacks in schools.
- However, the smaller and more “niche” team sports such as lacrosse, ice hockey and fast pitch softball all showed good increases for the year.

Water Sports (SGMA)

- Watersports have struggled in the poor economy of 2009, in particular the more expensive activities such as water-skiing and scuba-diving both of which have seen consistent declines since 2000.
- Wakeboarding was relatively stable with only a marginal decline of 0.8%.

Winter Sports (Snowsports Industries America)

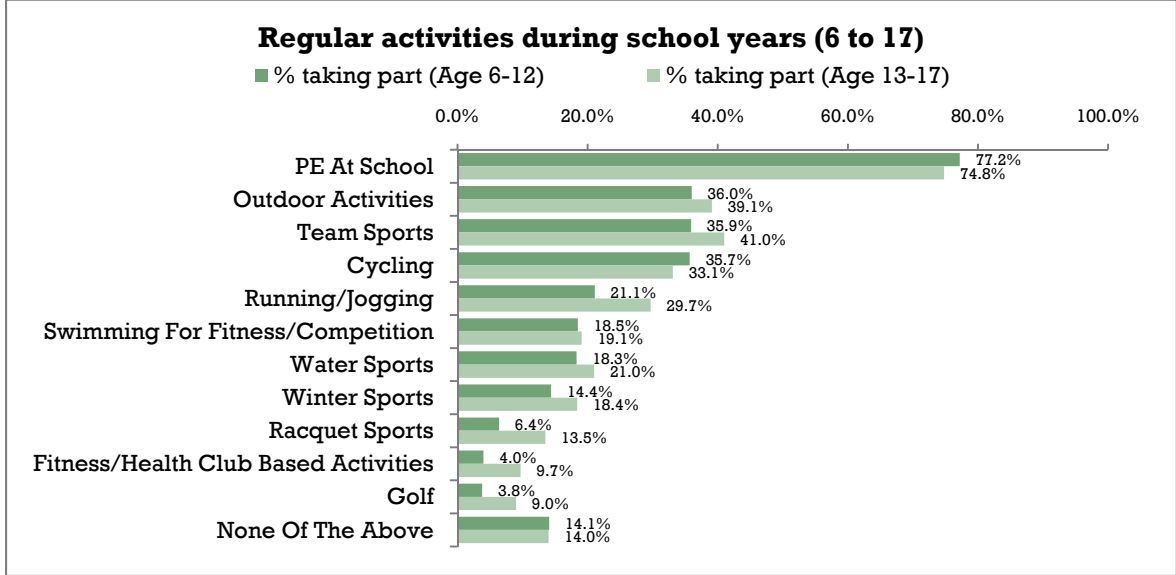
- Winter sports generally had a good year due to great snow over the 08/09 winter season. Most activities had single digit growth. Snowshoeing had an increase of 17.4% from 2.9 million to 3.4 million.
- The only monitored winter sport to show a decline was snowmobiling, typically an expensive option.

Tennis (USTA/TIA)

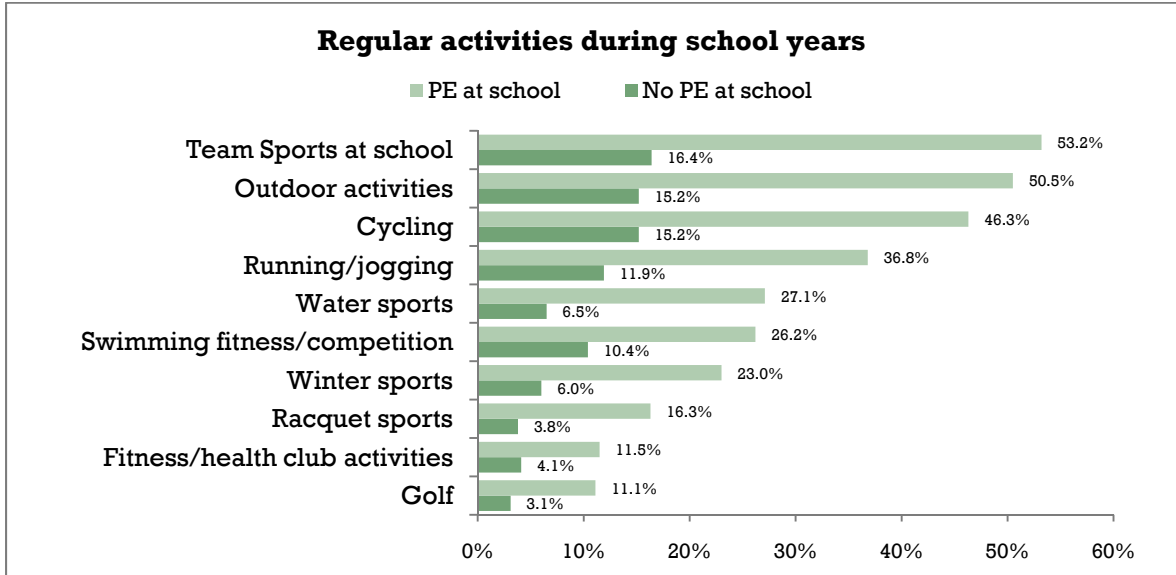
- Tennis participation remained strong in a tough economic environment. Tennis has increased 42.8% since the year 2000.
- Cardio tennis, although starting small, increased 20% from 2008 and has now pushed past 1 million participants in tennis based cardio-vascular exercise.

3 ACTIVITIES AT SCHOOL AGE

- Three quarters of respondents took part in PE at school regularly. Just over a third took part in outdoor activities, team sports and cycling.



- PE is the pathway to all the activities listed. For example, you are 3.3 times more likely to take part in team sports if you have PE than if you don't have PE. Outdoor activities, cycling, running/jogging and all the activities listed show similar increases in activity among those who have PE at school.



Active during school years leads to active adults

- There is clear evidence that those who are active during their school years are more active as adults.

Adults Age 21 and over	Inactive at school	Active at school (at least one activity)	Multiplier
Number Of Times Participated In Sports Activity in 2009			
Non-active	55.6%	19.1%	0.34
Low activity level (1-60 times)	16.4%	18.9%	1.15
Moderate activity level (61-200 times)	10.5%	19.4%	1.85
High activity level (201-499 times)	10.7%	21.7%	2.03
Super high activity level (500+ times)	6.7%	20.9%	3.12
Participation in activities by calories burned			
High Calorie Activities	23.3%	54.9%	2.36
Medium Calorie Activities	24.8%	57.3%	2.31
Low Calorie Activities	18.7%	49.4%	2.64
None	55.6%	19.1%	0.34

So those who are active during their school years are:

- Three times more likely to be super active as adults
- More than twice as likely to take part in high calorie burning activities.

Those who are inactive at school are three times more likely to be inactive as adults (55.6% compared to 19.1%).

PE at school leads to active adults

- There is also clear evidence that PE at school is a significant pathway to adult activity and health.

Adults 21+	No PE at school	PE at school (all ages)	Multiplier
Number Of Times Participated In Sports Activity in 2009			
Non-active	42.6%	19.0%	0.45
Low activity level (1-60 times)	17.6%	18.8%	1.07
Moderate activity level (61-200 times)	14.7%	19.1%	1.30
High activity level (201-499 times)	13.8%	21.9%	1.59
Super high activity level (500+ times)	11.3%	21.1%	1.87
Participation in activities by calories burned			
High Calorie Activity	34.1%	55.1%	1.62
Medium Calorie Activity	35.5%	57.6%	1.62
Low Calorie Activity	27.8%	49.9%	1.79
None	42.6%	19.0%	0.45

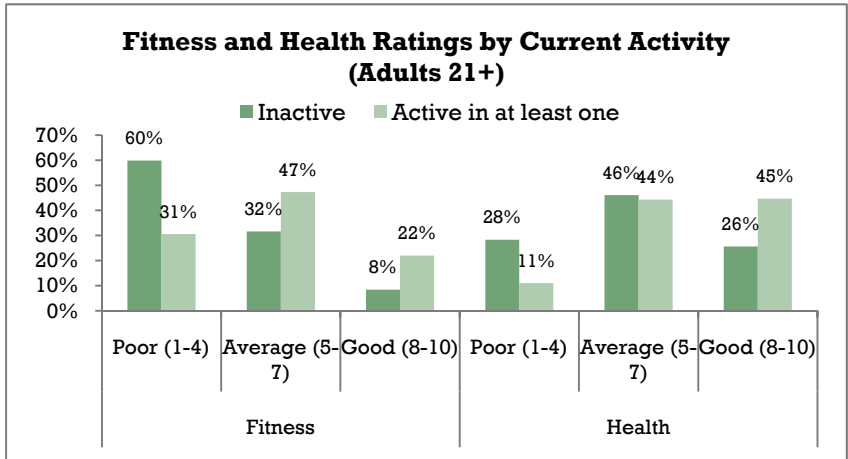
So those who take PE at school are:

- Nearly twice as likely to be super active as adults
- 62% more likely to take part in medium and high calorie burning activities.

Those who don't take PE at school are more than twice as likely to be inactive as adults (42.6% compared to 19.0%).

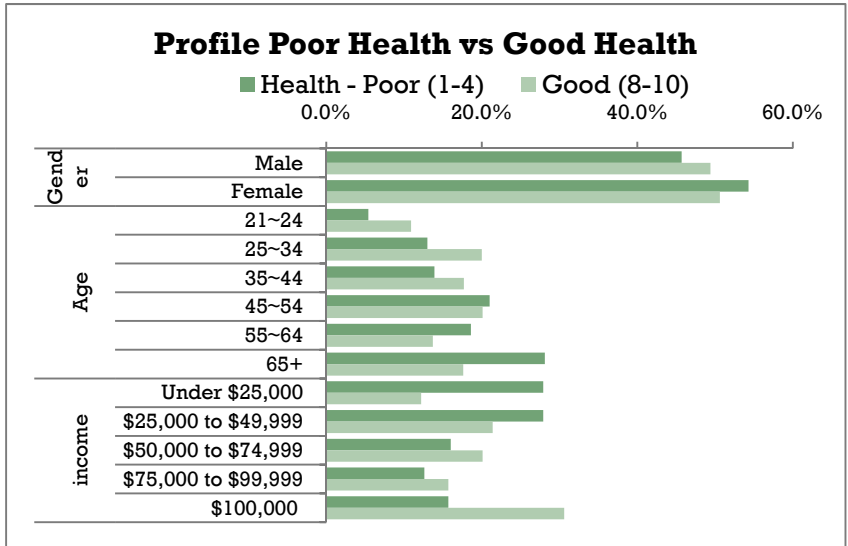
Active adults are more likely to say they are fit and healthy

- Active adults are significantly more likely to feel they are healthy: Active adults are nearly three times more likely to feel fit and nearly twice more likely to feel in good health.



Profile of “Active Adults” vs “Inactive Adults

- Those rating themselves as healthy are relatively more likely to be: ages 21 to 44, earn over \$50,000.



- Respondents who rated themselves as in “good health” were twice as likely to take part in high calorie burning activities than those in “poor health”.

