



2017 Participation Report

The Physical Activity Council's annual study tracking sports, fitness, and recreation participation in the US



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Your guide through the 2017 Participation Report

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Methodology

How the 2017 report research was conducted

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

During 2016 and the beginning of 2017, a total of 24,134 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over one million people operated by IPSOS/Synovate. A total of 11,453 individual and 12,681 household surveys were completed. The total panel is maintained to be representative of the US population for people ages six and older. Over sampling of ethnic groups took place to boost responses from typically under responding groups.

The 2016 participation survey sample size of 24,134 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 US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.31 percentage points at the 95 percent confidence level.

A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, ethnicity, household size, region, population density, and panel join date. The total population figure used was 296,251,344 people ages six and older.

“Inactivity” is defined to include those participants who reported no physical activity in 2016 and an additional 16 sports/fitness activities that require minimal to no physical exertion.

Data reported for “winter sports” are based on seasons: 2011 year is 2010/2011 season, 2012 year is 2011/2012 season, 2013 year is 2012/2013 season, 2014 year is 2013/2014 season, 2015 year is 2014/2015 season, and 2016 year is 2015/2016 season.

If you have specific questions regarding the methodology, please contact Sports Marketing Surveys USA at info@sportsmarketingsurveysusa.com or (561) 427-0647.

The Physical Activity Council is made up of the following industry leading organizations:

- ❖ CLUB/INSTITUTIONAL FITNESS: International Health, Racquet, and Sportsclub Association (IHRSA) www.ihrsa.org P: (617) 951-0055
- ❖ GOLF: National Golf Foundation (NGF) www.ngf.org P: (561) 744-6006
- ❖ OUTDOOR: Outdoor Foundation (OF) www.outdoorfoundation.org P: (202) 271-3252
- ❖ SNOWSPORTS: Snowsports Industries of America (SIA) www.snowsports.org P: (435) 657-5140
- ❖ TEAM SPORTS/INDIVIDUAL SPORTS/GENERAL FITNESS/WATER SPORTS: Sports & Fitness Industry Association (SFIA) www.sfia.org P: (301) 495-6321 and USA Football www.usafootball.com P: (317) 489-4417
- ❖ TENNIS: Tennis Industry Association (TIA) and United States Tennis Association (USTA) www.tennisindustry.org P: (843) 686-3036

Introduction

An overview of the research and insights into the numbers

The Physical Activity Council's annual study continued to track participation in 118 sports and fitness activities. This report gives a broad overview of the study. For more details on specific sports, please contact the relevant PAC partner (see Methodology).

Overall activity for 2016 had a favorable year with 42% of the population ages 6 and over participating at least once a week in a high calorie burning activity. Although active to a healthy level saw more participants, low to medium calorie burning activities saw a decrease in participation.

Most sport categories saw an increase in participation, with fitness sports and team sports having the most gain. Outdoor sports saw a modest increase over the last year. These activities have gain momentum since the 2% drop in 2014. With camping being the most aspirational sport for the second year, outdoor participation will likely to continue it's drive.

Inactivity in 2016 saw a modest drop, losing 0.1 million, a 0.2% decrease, and maintaining a 27% rate, partly because of the population increase. Although the last five years has remain relatively flat, on average, there appeared to be some momentum in the decline of inactivity. This decline was shown throughout all age segments, with only those ages 45 to 54 remaining flat. However, this was not true for income levels, where lower income households (less than 50K) saw a increase in inactivity and households with an income of 50K or more saw a slight decrease in inactivity.

Spending in sports equipment, clothing, and footwear all decreased in 2016. Even though most people chose not to spend on merchandise, they did increase their spending in the activities. Gym memberships, traveling to take part in a sport or activity, winter sports, outdoor recreation, and individual sporting events all saw an increase in spending.

A photograph of a woman with dark hair, wearing a white towel around her neck and earbuds, exercising on a stationary bike. The image is semi-transparent with a green border. A green rectangular box is overlaid on the center of the image, containing the text "OVERALL PARTICIPATION RATES" in bold, dark green, uppercase letters.

OVERALL PARTICIPATION RATES

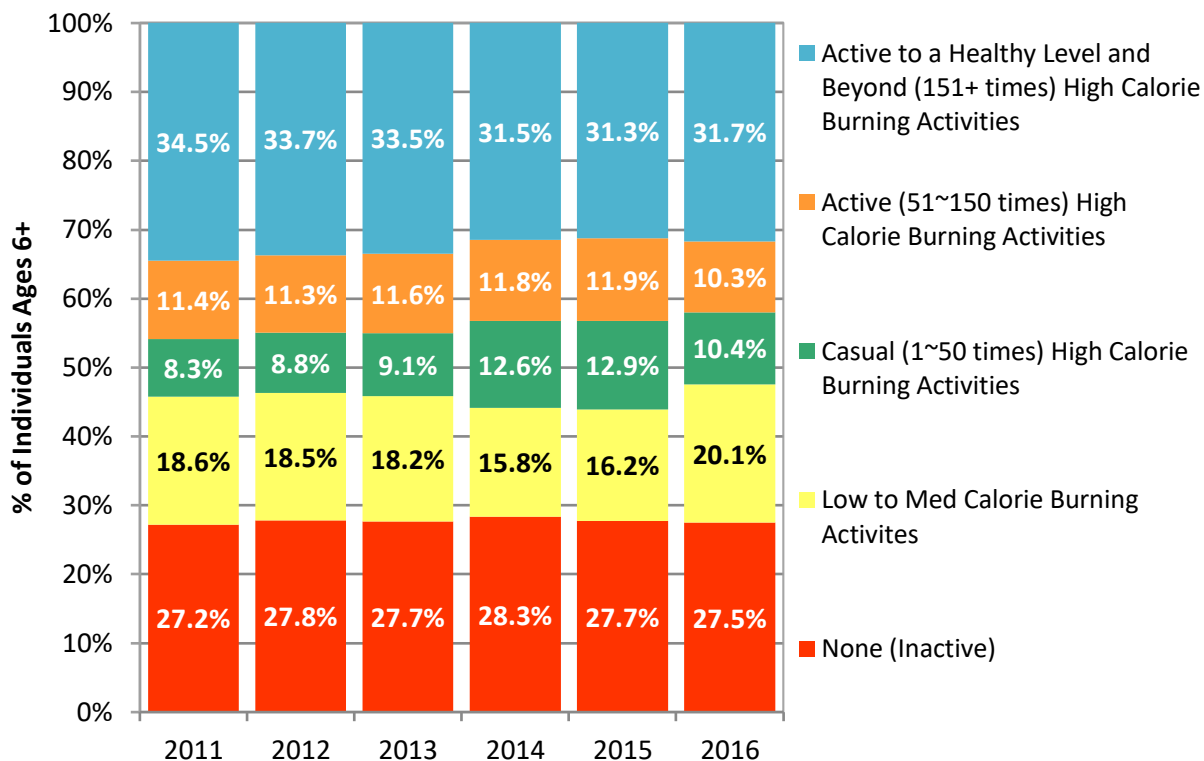
Activity Level Trends

A breakdown of activity levels over time

Inactive to Healthy Active Across 5 years

US Population, Ages 6+

In 2016, overall activity increased 0.3% from 2015. Although 2016 saw a decrease of both the active and casual participates, about a third of the total population reported being active to a healthy level. While high caloric burning activities continued to rise, showing more participation in cross training workouts, increase use of stair climbing machines, and greater involvement in triathlon's and climbing, the overall impact to the inactivity rate remained miniscule.



2011 – 2016 Participation Trends

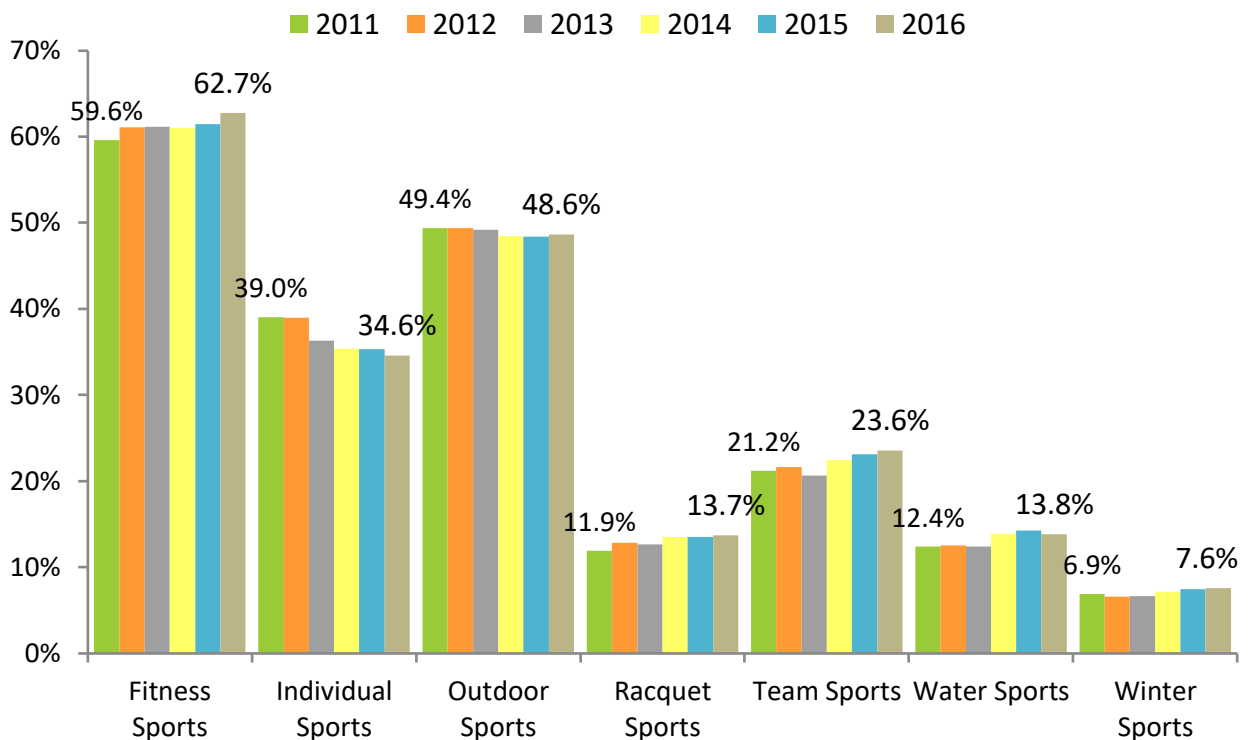
A look at physical activity participation by year

Total Participation Rate by Activity Category

US Population, Ages 6+

Most categories showed a moderate increase in participation. Fitness sports had the most gain, increasing 2% over the last year. Water sports saw the greatest loss with a 3% decrease. Over the last five years, racquet sports steadily increased 3% on average, largely driven by Cardio Tennis and Squash. Team sports continued to gain momentum, adding 2% from 2015 and averaging a 5% increase over the last three years. This being mainly influenced by the niche sports, such as Rugby and Gymnastics, gaining popularity.

Participation Rates: % of Individuals Ages 6+



*Winter Sports are based on season

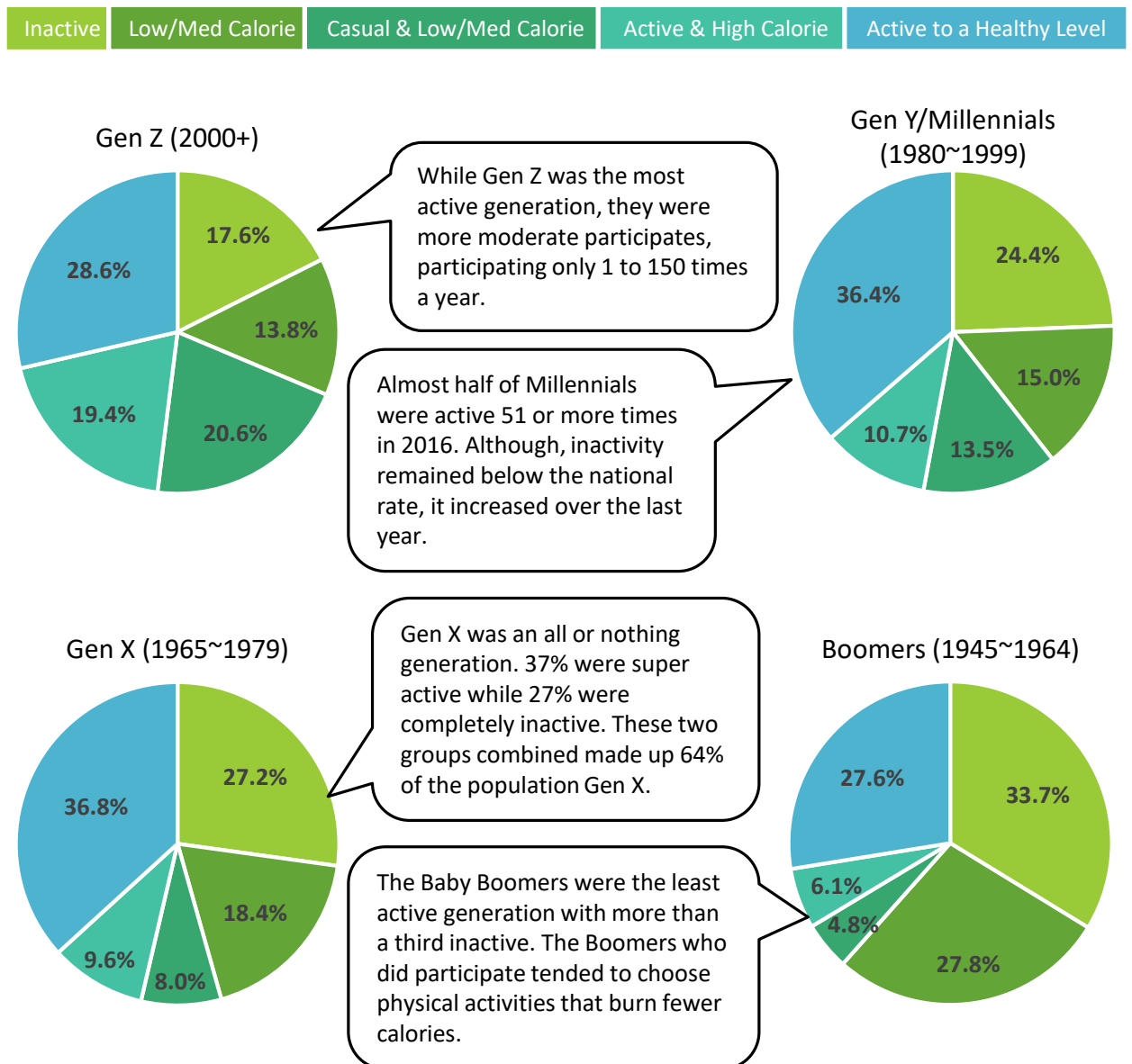
*See Appendix for breakdown of sports included in each category

Participation by Generation

A look at activity levels by generation

Participation Rates Segmented by Generations

US Population, Ages 6+



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

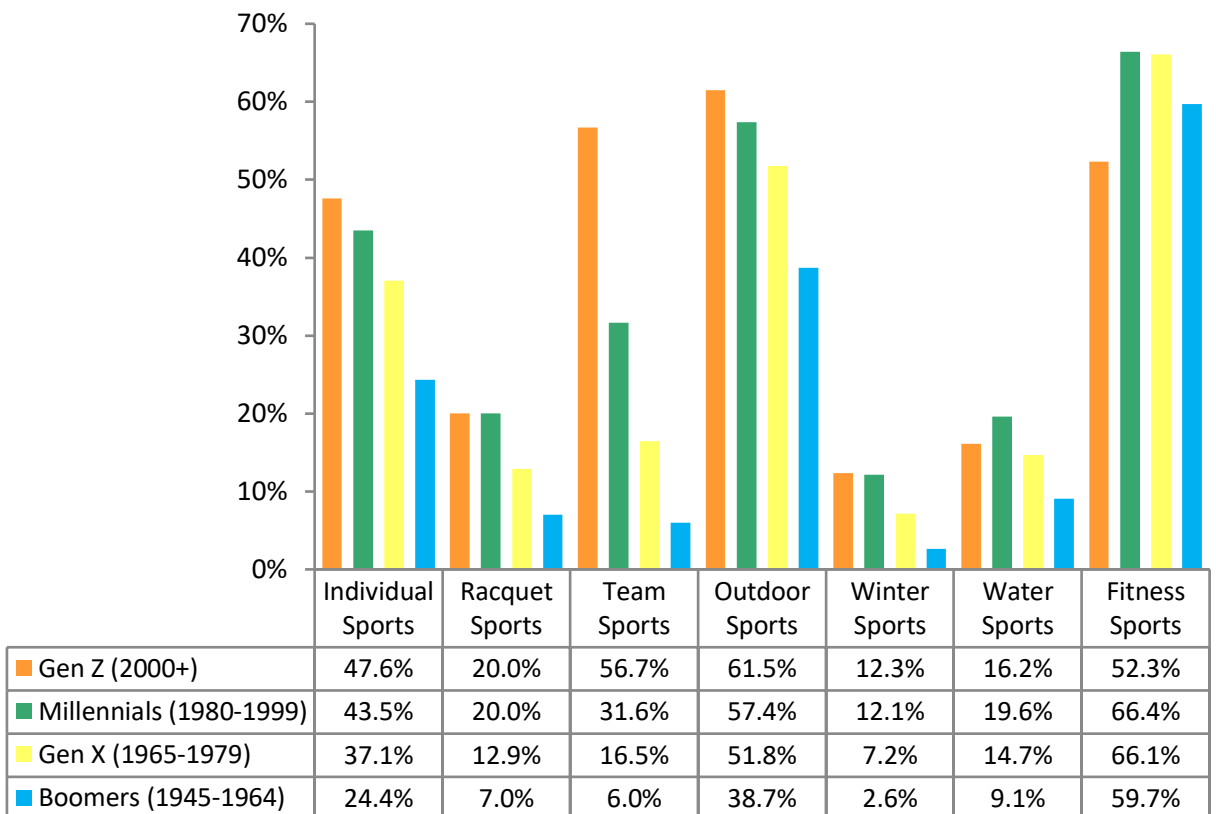
Participation by Generation

Types of participation by generation

Activity Category Segmented by Generations

US Population, Ages 6+

When it comes to activity preference, fitness and outdoor sports were the most common activity across all generations. While Gen Z were more likely to participate in team sports and outdoor activities, Millennials, Gen X, and Baby Boomers were more fitness activity focused. Water sports were largely driven by Millennials, while half of the Gen X population were involved in outdoor activities.





OVERALL INACTIVITY LEVELS IN THE US

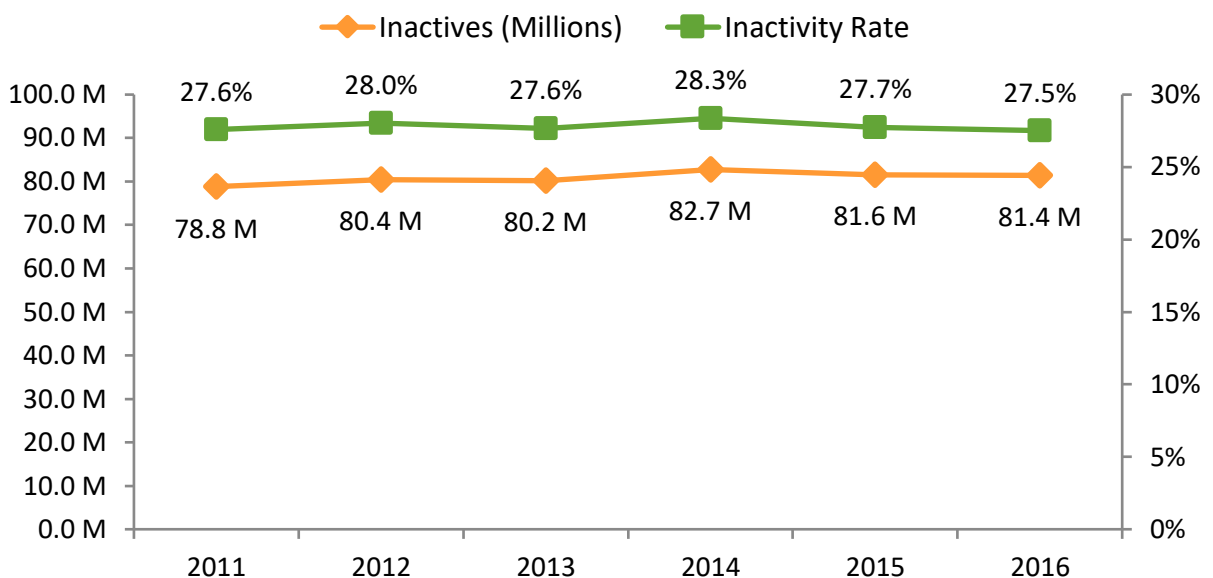
2011 – 2016 Inactivity Trends

Overall inactivity levels in the US

Inactivity Rate vs. Total Inactives

US Population, Ages 6+

In 2016, 27.5% of U.S. residents were inactive. The total number of inactive persons decreased by about 100,000 but that still leaves 81M people in the U.S. who did not participate in any physical activity in 2016. There are many programs designed to combat inactivity including #optoutside spearheaded by REI, the National Parks student discounts, step challenges sponsored through various fitness apps and tracking devices, and a wide variety of other programs aimed at getting people off the couch and into some kind of physical activity. Continuing these vital efforts will result in decreasing inactivity rates and healthier American communities.



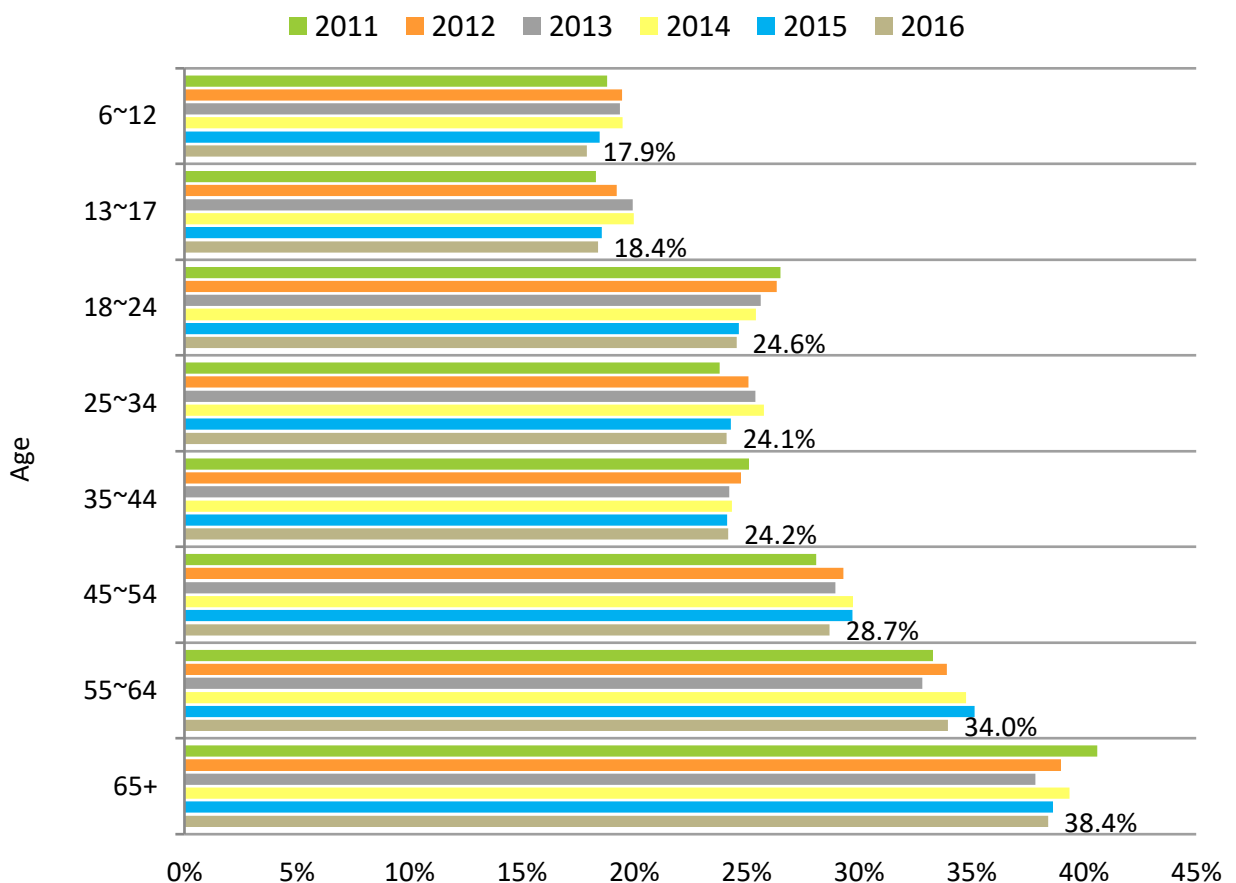
2011 – 2016 Inactivity by Age

Overall inactivity levels in the US

Inactivity Rates Segmented by Age

US Population, Ages 6+

The decrease of inactivity spread itself across most the age groups. Age segment 35 to 44 remained flat from 2015, while the following two age segments, ages 45 to 64, showed the most one year decline in inactivity rates than any other age segment. The youth age groups had slight decreases and still maintained the lowest inactive rates.



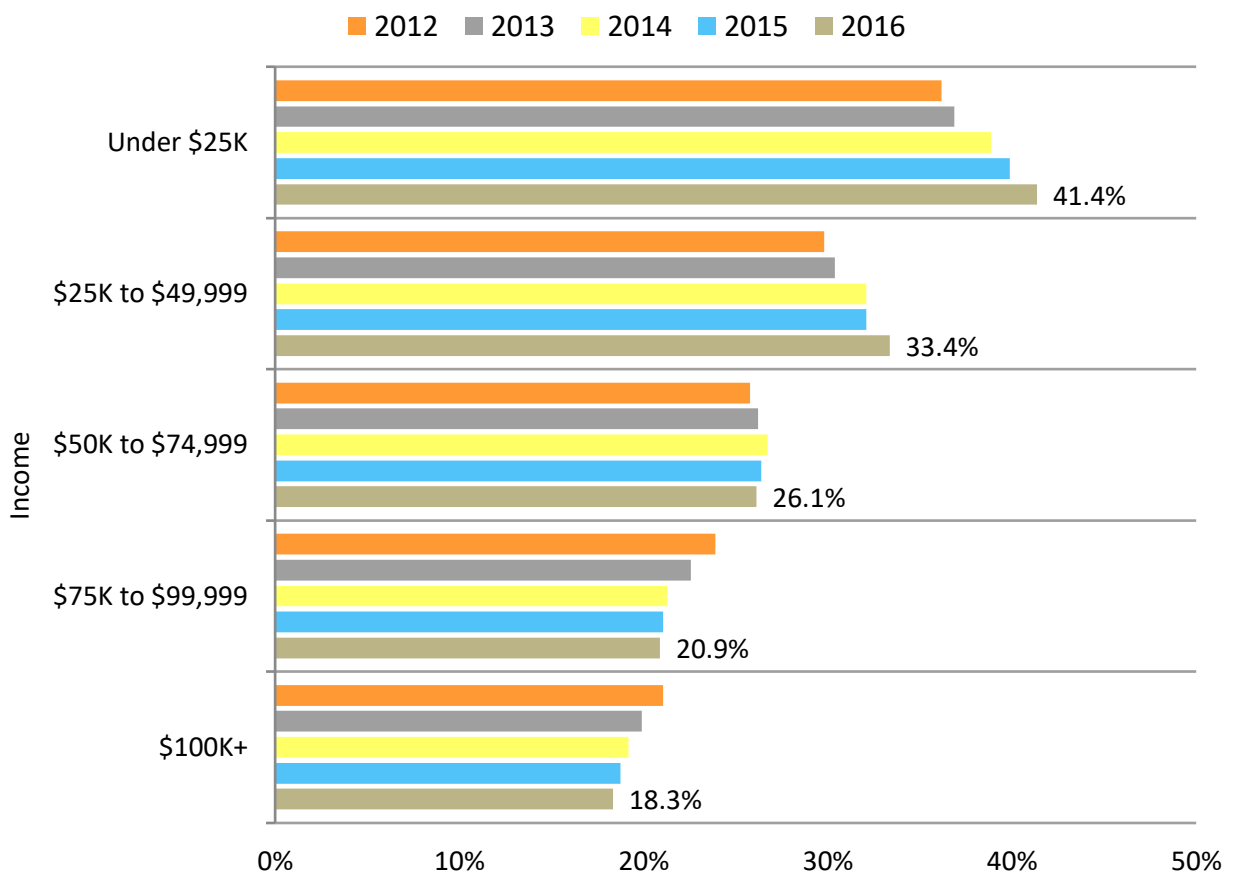
2011 – 2016 Inactivity by Income

Overall inactivity levels in the US

Inactivity Rates Segmented by Income

US Population, Ages 6+

The correlation between activity and income was evident in the last five years. Lower income households continued to have the highest inactivity rates, showing almost half being inactive in 2016. They also had the highest rate gain, increasing by 14% on average, since 2012. Income households over 50K, all show a decrease in activity over the last three years. More initiatives that offer discounted access to sports and activities are needed to bridge the gap between being physically healthy and the cost of doing so.



A male athlete is shown in a starting crouch on a track, wearing a black and white singlet and shorts. He is holding a baton in his right hand, ready to pass it. The image is overlaid with a semi-transparent green banner containing the text "SPENDING IN FITNESS".

SPENDING IN FITNESS

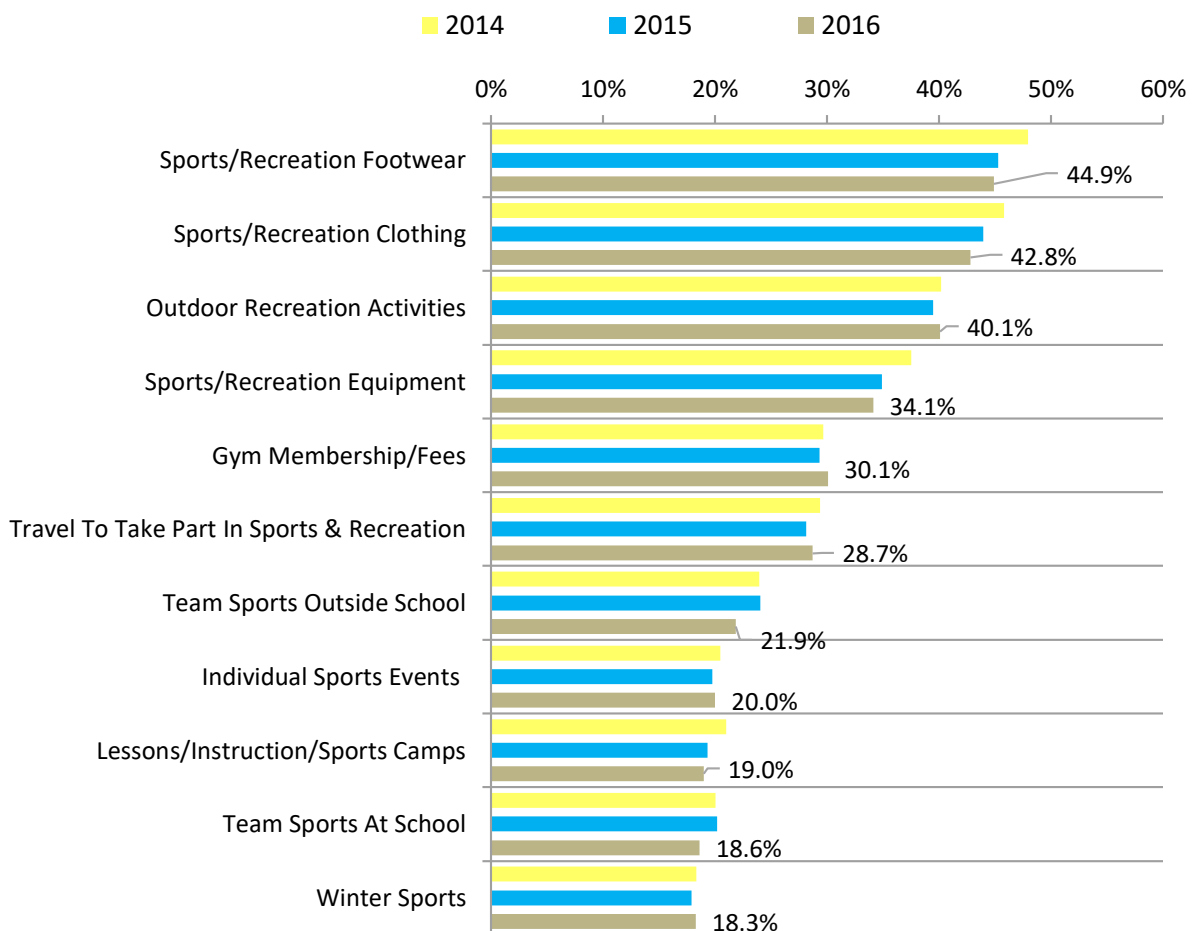
Spending Trends

Fitness and activity related spending.

Spending Over a Three Year Span

US Population, Ages 6+

While it appears overall spending was slightly down, multiple categories, including outdoor recreation, gym memberships, and travel saw an increase in 2016. Households continued to spend more in sports/recreation footwear and clothing while still decreasing over the last year. Noticeably, team sports appeared to take the biggest hit as spending in these categories decreased at around 8%.



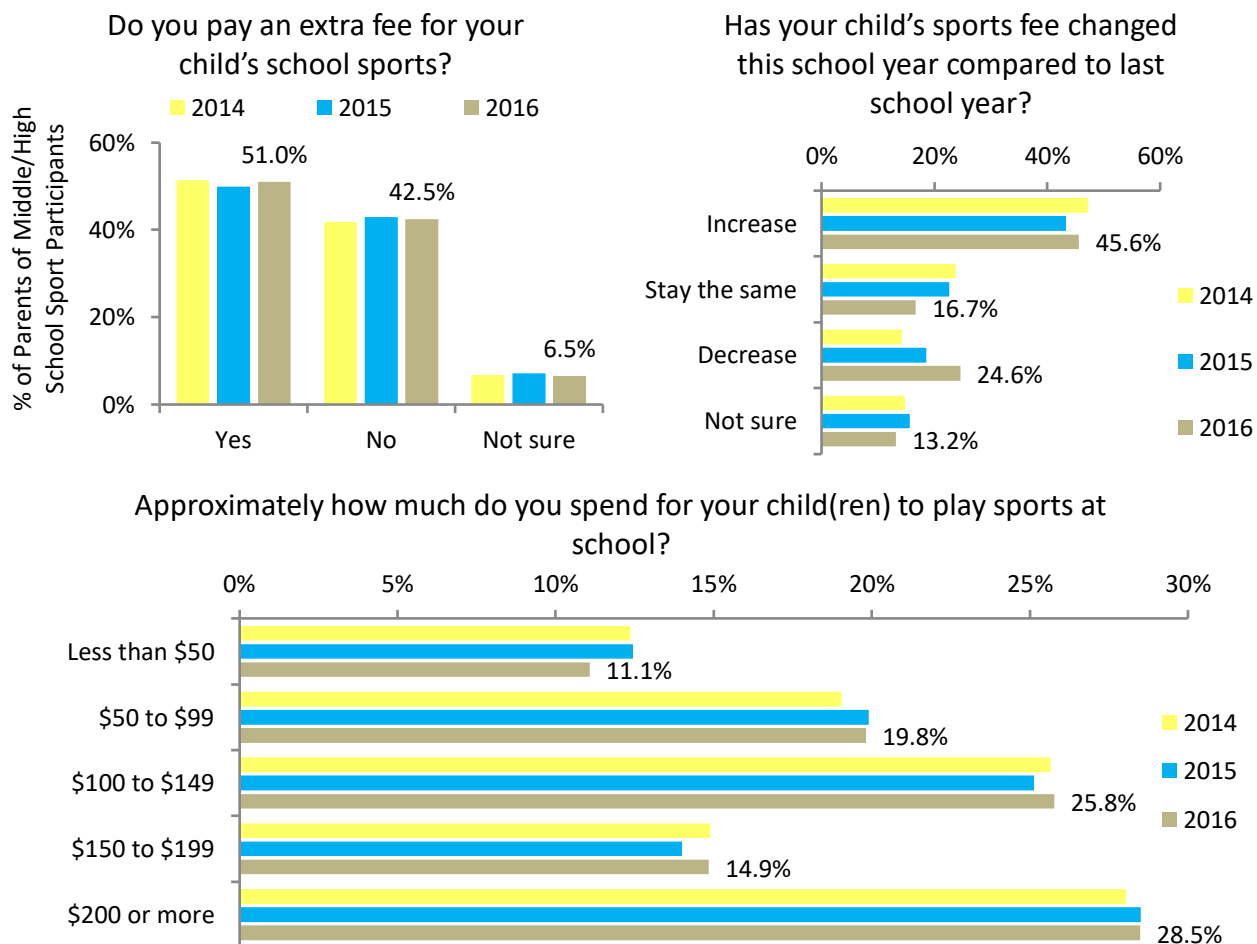
Pay-To-Play

Spending for youth school sports programs

Trends in Pay-to-Play School Programs

US Population, Ages 25+ with children ages 6~17

More schools seemed to have charged extra for student sport participation and 2016 saw an increase in these fee's. Of the 51% of adults who say they did pay extra for their child's school sports, 47% saw the fee's increase and only 25% saw a decrease. The majority of parents paid out over a \$100 in fees for the school year.



Purchases to Encourage Fitness

A look at spending on ways to track fitness

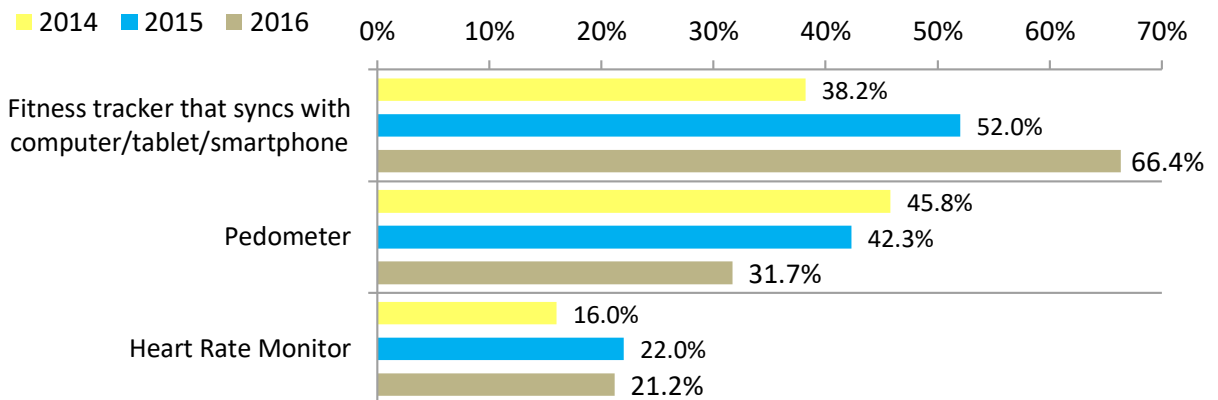
Tracking Health and Fitness Progress

More than a quarter of all active participants owned a fitness tracking device in 2016. Ownership has increased since 2014. Interestingly, as inactive ownership went down, active ownership went up, hinting at wearing a fitness tracking device encourages more physical activity.

Do you own a wearable device for Fitness Tracking?

		Inactive	Active
2014	Yes	11.1%	22.5%
	No	88.9%	77.5%
2015	Yes	10.7%	25.7%
	No	89.3%	74.3%
2016	Yes	7.3%	28.0%
	No	92.7%	71.0%

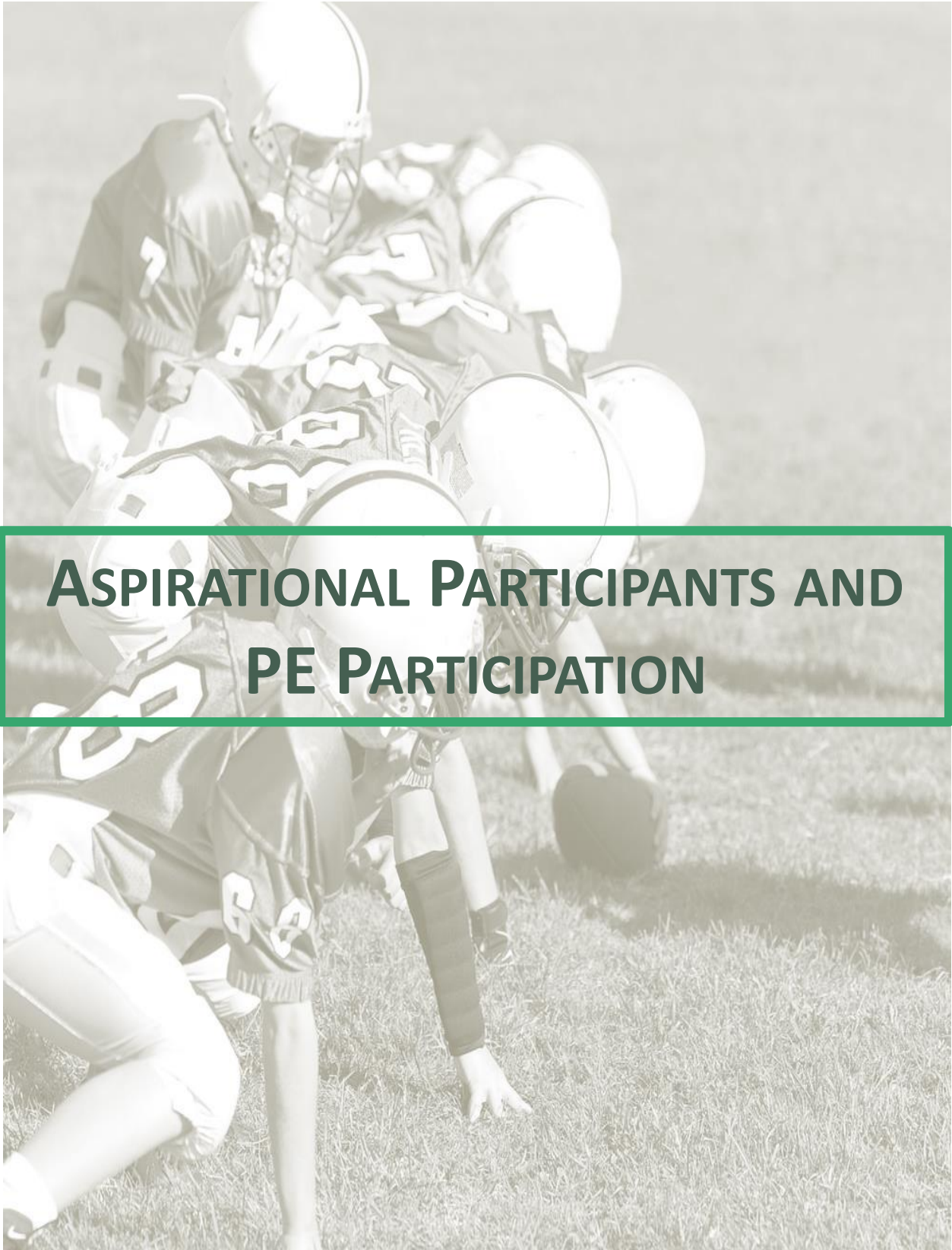
What type of wearable device for fitness tracking do you own?



Do you plan on purchasing a wearable technology to track your physical activity in the coming year?

		Inactive	Active
2014	Yes	3.0%	9.3%
	No	97.0%	90.7%
2015	Yes	4.9%	12.5%
	No	95.1%	87.5%
2016	Yes	10.7%	25.7%
	No	89.3%	74.3%

As the technology advances in wearable fitness tracking, the interest, for both active and inactive alike, increased. More than a quarter of active participants said they are looking to purchase wearable technology in the coming year.



ASPIRATIONAL PARTICIPANTS AND PE PARTICIPATION

Non-Participant Interest

Which sports interest non-participants

Participation Interests Among Non-Participants

"Aspirational" Sports Participation on Non-Participants by Age

Camping seemed to be the activity most non-participants have aspirations to do. While younger age groups aspire to join team sports, older age segments were interested in other outdoor activities, such as bicycling and fishing.

Interest Level	Ages 6~12			
	Ages 6~12	Ages 13~17	Ages 18~24	Ages 25~34
1	Camping	Camping	Camping	Swimming For Fitness
2	Basketball	Swimming For Fitness	Bicycling	Camping
3	Fishing	Running/Jogging	Backpacking	Bicycling
4	Soccer	Fishing	Martial Arts	Running/Jogging
5	Swimming for Fitness	Bicycling	Climbing	Hiking
6	Bicycling	Working out using machines	Working out with weights	Backpacking
7	Running/Jogging	Hiking	Hiking	Canoeing
8	Football	Basketball	Swimming For Fitness	Fishing
9	Swimming on a Team	Football	Working out using machines	Working out using machines
10	Martial Arts	Martial Arts	Kayaking	Working out with weights

Interest Level	Ages 35~44			
	Ages 35~44	Ages 45~54	Ages 55~64	Ages 65+
1	Camping	Camping	Camping	Birdwatch/Wildlife Viewing
2	Bicycling	Bicycling	Bicycling	Fishing
3	Swimming For Fitness	Fishing	Birdwatch/Wildlife Viewing	Swimming For Fitness
4	Hiking	Hiking	Fishing	Working out using machines
5	Working out with weights	Swimming For Fitness	Swimming For Fitness	Bicycling
6	Fishing	Birdwatch/Wildlife Viewing	Hiking	Hiking
7	Running/Jogging	Canoeing	Working out using machines	Camping
8	Working out using machines	Working out using machines	Canoeing	Working out with weights
9	Canoeing	Working out with weights	Working out with weights	Fitness classes
10	Backpacking	Backpacking	Backpacking	Golf

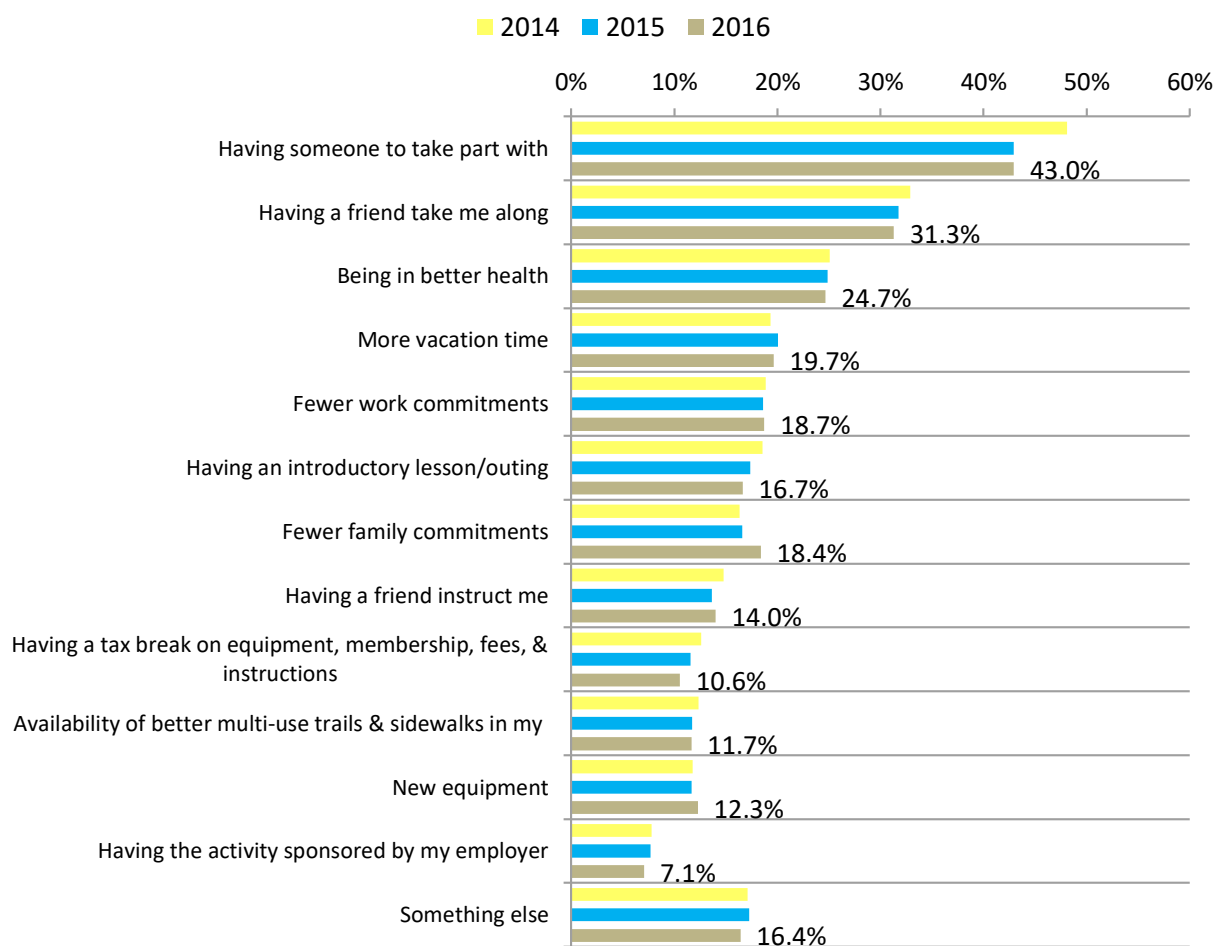
Non-Participant Interest

What would help get non-participants involved

Ways to Get a Non-participants Involved in Activities

"Aspirational" Sports Participation by Age

The key to getting Americans active was to understand the barriers between being sedentary and having an active lifestyle. Most people found participating in sports or fitness more enjoyable if there was someone doing it with them. Health was the next barrier. Even though being active would make them healthier, many saw this as a barrier from the start.



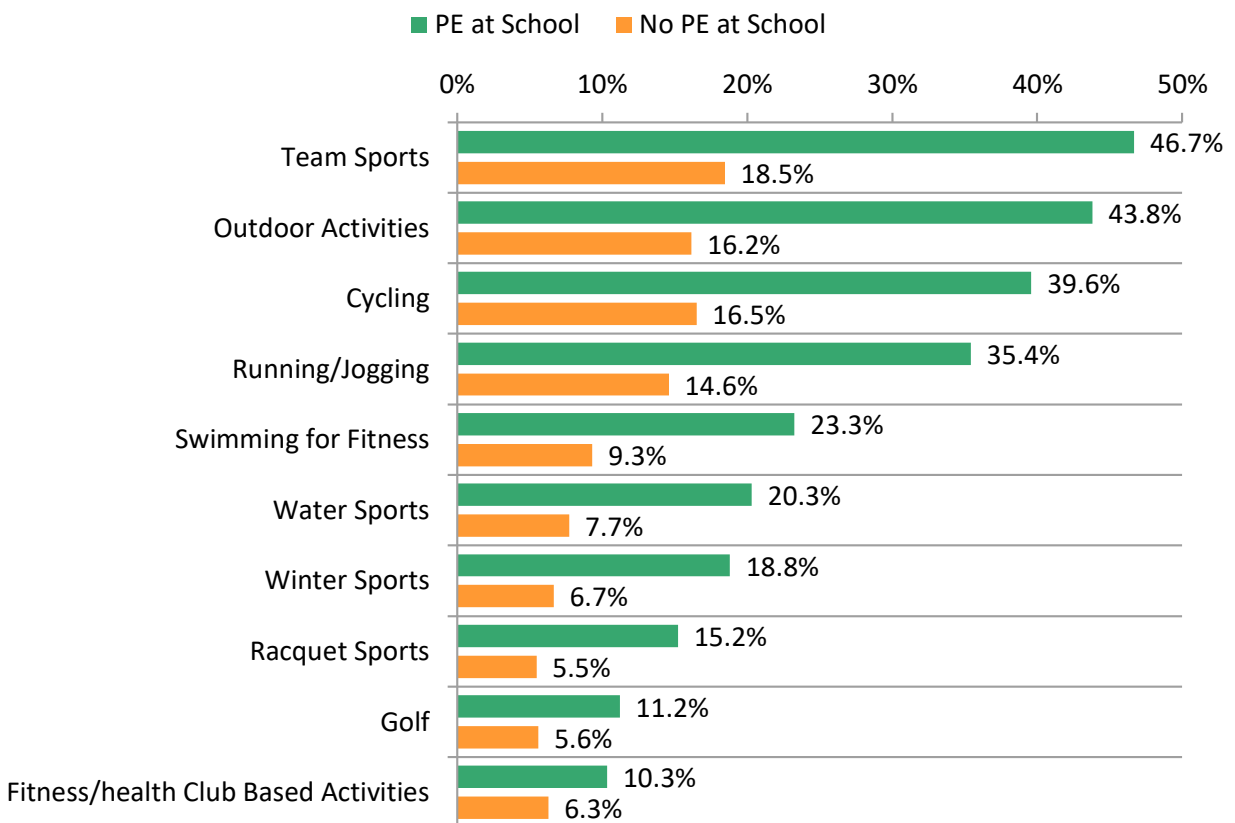
The PE Pathway

How youth are engaged in physical activities

The Effect of PE on Physical Activities During School Years

US Participants, Ages 18+ asked about PE during school years

Participation in sports and activities early on plays an important role. Almost 50% of American's ages 18 and over who participated in PE between the ages of 6 and 17 were also active in either team sports or outdoor activities during the same time frame. Over a third participated in cycling or running/jogging. While those who did not participate in PE reported much less activity.



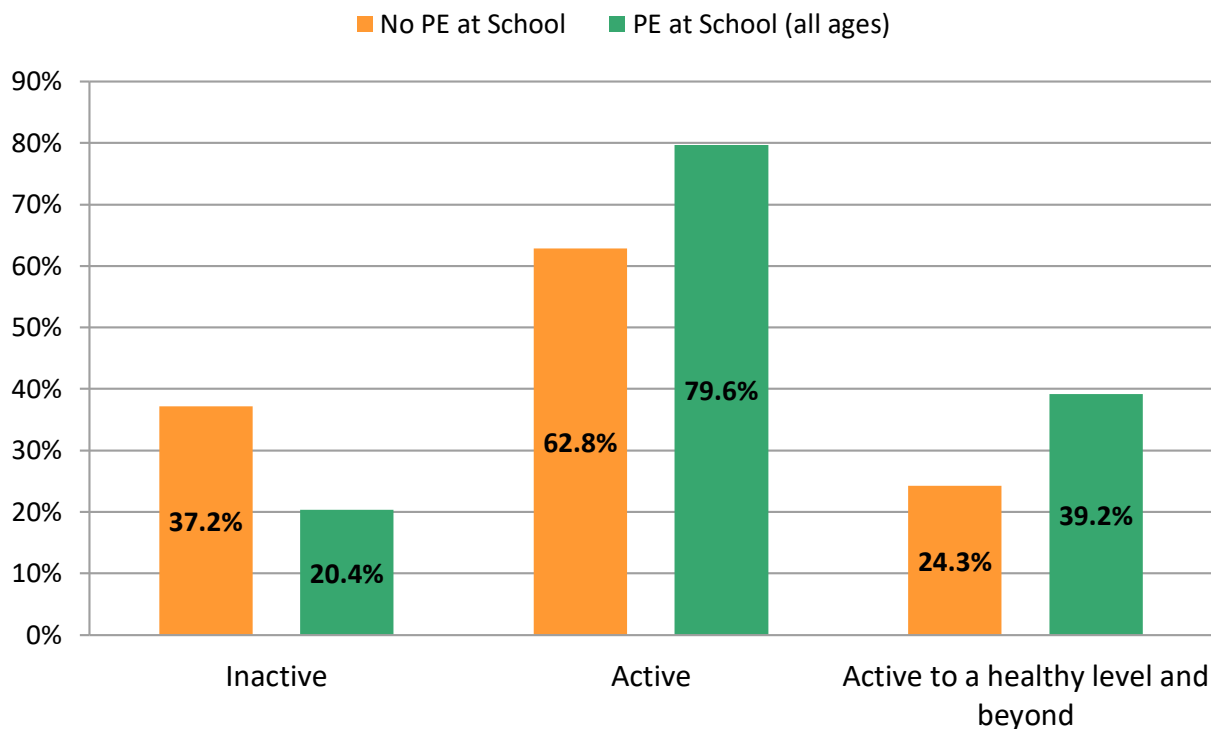
The PE Pathway

How adults who had PE are engaged in physical activities

The Effect of PE on Physical Activities During Adult Years

US Participants, Ages 18+ asked about PE during school years

When looking at the overall impact PE has on future participation, there was an remarkable correlation. About 80% of current active participates say they had PE during their school years. Almost half of these people are active to a healthy level, meaning they participate in high caloric burning activities at least three times a week. While only a quarter of those who didn't have PE during school were active to a healthy level.



Appendix 1

List of sports/activities in grouped categories

Fitness Activities: High Impact/Intensity and Training, Dance, Step and Other Choreographed Exercise to Music, Cardio Kickboxing, Elliptical Motion Trainer/Cross-Training, Row Machine, Stationary Cycling (Group, Recumbent, Upright), Stair-Climbing Machine, Treadmill, Aquatic Exercise, Boot-Camp Style Training, Bodyweight Exercise & Bodyweight Accessory-Assisted Training, Cross-Training Style Workouts, Barre, Pilates Training, Stretching/flexibility training/warm up/cool down/mobility, Tai Chi, Yoga, Free Weights (Barbells, Dumbbells), Kettlebells, Weight/Resistance Machines, Running/Jogging, Swimming for Fitness, and Walking for Fitness.

Individual Sports: Triathlon (Traditional/Road, Non-Traditional/Off-Road), Adventure Racing, Golf, Boxing (Fitness, Competition), Martial Arts, MMA (Fitness, Competition), Other Combat Training, Bowling, Ice Skating, Roller Skating (2x2 Wheels, In-Line), Skateboarding, Archery, Shooting (Sports Clays, Trap/Skeet), Target Shooting (Rifle, Handgun), and Trail Running.

Outdoor Sports: Adventure Racing, Backpacking Overnight (more than a ¼ mile from home/vehicle), Bicycling (Road/Paved Surface, Mountain/Non-Paved Surface, BMX), Birdwatching (excursion more than ¼ mile from home/vehicle), Boardsailing/Windsurfing, Camping (within ¼ mile from home/vehicle), Camping (RV), Canoeing, Climbing (Sport/Indoor/Boulder, Traditional/Ice/Mountaineering), Fishing (Fly, Saltwater, Freshwater/Other), Hiking (Day), Hunting (Rifle, Shotgun, Handgun, Bow), Kayaking (White Water, Sea/Touring, Recreational), Rafting, Running/Jogging, Sailing, Scuba Diving, Skateboarding, Skiing (Cross-Country, Alpine/Downhill, Freestyle), Snorkeling, Snowboarding, Snowshoeing, Stand-Up Paddling, Surfing, Telemark (Downhill), Trail Running, Triathlon (Traditional/Road, Non-Traditional/Off-Road), Wakeboarding, and Wildlife Viewing (excursion more than ¼ mile from home/vehicle).

Racquet Sports: Badminton, Cardio Tennis, Pickleball, Racquetball, Squash, Tennis, and Table Tennis.

Team Sports: Ultimate Frisbee, Gymnastics, Baseball, Basketball, Cheerleading, Ice Hockey, Field Hockey, Football (Flag, Tackle, Touch), Lacrosse, Paintball, Rugby, Soccer (Indoor, Outdoor), Softball (Fast-Pitch, Slow-Pitch), Track and Field, Volleyball (Court, Grass, Sand/Beach), Wrestling, Roller Hockey, and Swimming on a Team.

Water Sports: Boardsailing/Windsurfing, Canoeing, Kayaking (White Water, Sea/Touring, Recreational), Jet Skiing, Rafting, Sailing, Scuba Diving, Snorkeling, Stand-Up Paddling, Surfing, Wakeboarding, and Water Skiing.

Winter Sports: Skiing (Cross-Country, Alpine/Downhill, Freeski/Freestyle), Sledding/Saucer Riding/Snow Tubing, Snowboarding, Snowshoeing, Telemark (Downhill).

Appendix 2

List of sports/activities in activity levels

Inactive: Archery, Birdwatching (excursion more than ¼ mile from home/vehicle), Camping (within ¼ mile from home/vehicle), Camping (RV), Fishing (Fly, Saltwater, Freshwater/Other), Hunting (Rifle, Shotgun, Handgun, Bow), Shooting (Sports Clays, Trap/Skeet), Target Shooting (Rifle, Handgun), and Wildlife Viewing (excursion more than ¼ mile from home/vehicle).

Low Calorie Burning Activities: Stretching/flexibility training/warm up/cool down/mobility, Walking for Fitness, Sledding/Saucer Riding/Snow Tubing, Snowmobiling, Bowling, Table Tennis, Boardsailing/Windsurfing, Jet Skiing, and Sailing.

Medium Calorie Burning Activities: Barre, Tai Chi, Yoga, Free Weights (Barbells, Dumbbells) Kettlebells, Weight/Resistance Machines, Golf, Baseball, Cheerleading, Football (Flag), Gymnastics, Paintball, Softball (Fast-Pitch, Slow-Pitch), Ultimate Frisbee, Volleyball (Court, Grass, Sand/Beach), Skiing (Alpine/Downhill, Freeski/Freestyle), Snowboarding, Telemark (Downhill), Ice Skating, Roller Skating (2x2 Wheels, In-line), Skateboarding, Kayaking (White Water, Sea/Touring, Recreational), Rafting, Scuba Diving, Snorkeling, Surfing, Wakeboarding, Water Skiing, Backpacking (more than a ¼ mile from a vehicle/home), and Hiking (Day).

High Calorie Burning Activities: High Impact/Intensity and Training, Dance, Step, and Other Choreographed Exercise to Music, Cardio Kickboxing, Stationary Cycling (Group, Recumbent, Upright), Elliptical Motion Training/Cross-Training, Rowing Machine, Treadmill, Aquatic Exercise, Boot Camp Style Training, Bodyweight exercise and Bodyweight Accessory-Assisted Training, Cross-Training Style Workouts, Pilates Training, Adventure Racing, Bicycling (BMX, Mountain/Non-Paved Surface, Road/Paved Surface), Running/Jogging, Swimming for Fitness, Triathlon (Traditional/Road, Non-Traditional/Off-Road), Basketball, Field Hockey, Football (Tackle, Touch), Ice Hockey, Lacrosse, Rugby, Soccer (Indoor, Outdoor), Swimming on a Team, Track and Field, Cardio Tennis, Pickleball, Racquetball, Squash, Tennis, Skiing (Cross-Country), Snowshoeing, Boxing (Fitness, Competition), Martial Arts, MMA (Fitness, Competition), Wrestling, Other Combat Training, Roller Hockey, Stand-Up Paddling, Climbing (Sport/Indoor/Boulder, Traditional/Ice/Mountaineering), and Trail Running)

About Us

Sports Marketing Surveys USA and the Physical Activity Council

SPORTS MARKETING SURVEYS USA

Sports Marketing Surveys USA

Sports Marketing Surveys (SMS) USA is a full service marketing research company with its roots firmly planted in sports participation, consumer quantitative and qualitative research, dealer studies, and much more all related to sports. Since 1985, SMS has been providing, data, insight and analysis to help drive strategic decision making.



Physical Activity Council

Each year, the Physical Activity Council (PAC) conducts the largest single-source research study of sports, recreation and leisure activity participation in the nation. The PAC is made up of eight of the leading sports and manufacturer associations that are dedicated to growing participation in their respective sports and activities.

The PAC is made up of the following trade and industry associations:

- International Health, Racquet and Sportsclub Association (IHRSA)
- National Golf Foundation (NGF)
- Outdoor Industry Association and Outdoor Foundation (OIA) and (OF)
- Snowsports Industry of America (SIA)
- Sport & Fitness Industry Association (SFIA)
- Tennis Industry Association (TIA) and United States Tennis Association (USTA)
- USA Football

These leading trade and industry organizations are dedicated to providing the most comprehensive, accurate, and actionable database of sports participation data. The respondents come from a panel of over one million Americans and are managed by IPSOS/Synovate. The study looks at 120 different sports and activities in a variety of sub categories including but not limited to: team and individual sports, outdoor sports and activities like camping, hunting, and fishing; fitness and exercise, action sports, golf, tennis, and much more.

The data, dating back as far as 2000, is representative of the US population ages six and older. Universally accepted research practices are used to ensure data is obtained from traditionally under responding segments of the population. Please contact any of the individual members of the PAC or Sports Marketing Surveys to learn more about the study and other available data.

Disclaimer

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