



2016 Participation Report

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

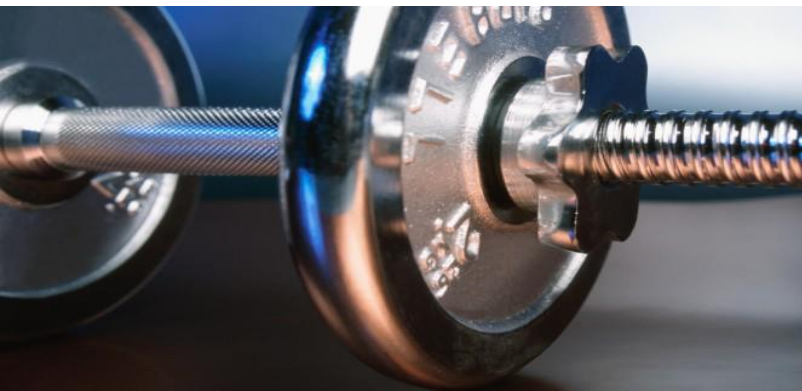


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METHODOLOGY

How the 2016 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 the 2015 calendar year, a total of 32,658 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 15,167 individual and 17,491 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 2015 participation survey sample size of 32,658 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 0.24 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, household size, region, population density, and panel join date. The total population figure used was 294,141,894 people ages six and older.

“Inactivity” is defined to include those participants who reported no physical activity in 2015 and an additional 18 sports/fitness activities that require minimal to no physical exertion.

Data reported for “winter sports” are based on seasons: 2010 year is 2009/2010 season, 2011 year is 2010/2011 season, 2012 year is 2011/2012 season, 2013 year is 2012/2013 season, 2014 year is 2013/2014 season, and 2015 year is 2014/2015 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: (703) 556-9020
- TEAM SPORTS/INDIVIDUAL SPORTS/GENERAL FITNESS/WATERSPORTS: 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 continues to track participation in 120 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).

Participation in sports seemed to be fluctuating over the last few years, with an increase in team, winter, water, and fitness sports participation. Individual sports declined slightly in 2015 while racquet and outdoor sports remained flat. This meant there were 212.6 million "actives" taking part in a wide range of sports and fitness activities in 2015, a slight increase from 209.3 actives in 2014.

The overall levels of inactivity decreased marginally in the last 12 months from 28.3% of Americans age six and older in 2014 to 27.7% in 2015. However, there are still 81.6 million inactive Americans.

Inactivity decreased for most age groups, with 13 to 17 year olds having the biggest drop (1.4%) and 35 to 44 year olds having the lowest decrease (0.2%) in 2015. While those Americans between the ages of 45 to 54 remained flat in inactivity, there was a gradual increase in inactivity for 55 to 64 year olds.

"Gen Z," or those born in this millennium, continue to dominate team sports category. There continues to be an increase in team sports participation from the "Gen Z" population, which is due partially to the birth boom in 2007, who are now around the age of 8. The Millennials and "Gen X" groups maintain the most participation in fitness sports. Boomers are more likely to participate in fitness activity than any other category.

In terms of interest, all age groups continue to look at swimming as a means for future fitness. Followed heavily by outdoor activities, such as camping and biking. Fitness activities are featured high on the list for most adult age groups while team sports are more attractive to the youths.

Those "aspirational" participants report that having someone to participate with or having a friend bring them along would be a strong motivator to start a new activity. While having more free time was mentioned to be helpful, more people felt that their current health was a big hindrance.

A grayscale photograph of a person running up a wide set of concrete stairs in a stadium. The person is seen from behind, wearing a dark tank top and shorts, with their right arm extended back. The stairs are flanked by rows of empty white bleachers. A metal handrail runs alongside the stairs. The overall image has a faded, high-contrast appearance.

OVERALL PARTICIPATION RATES

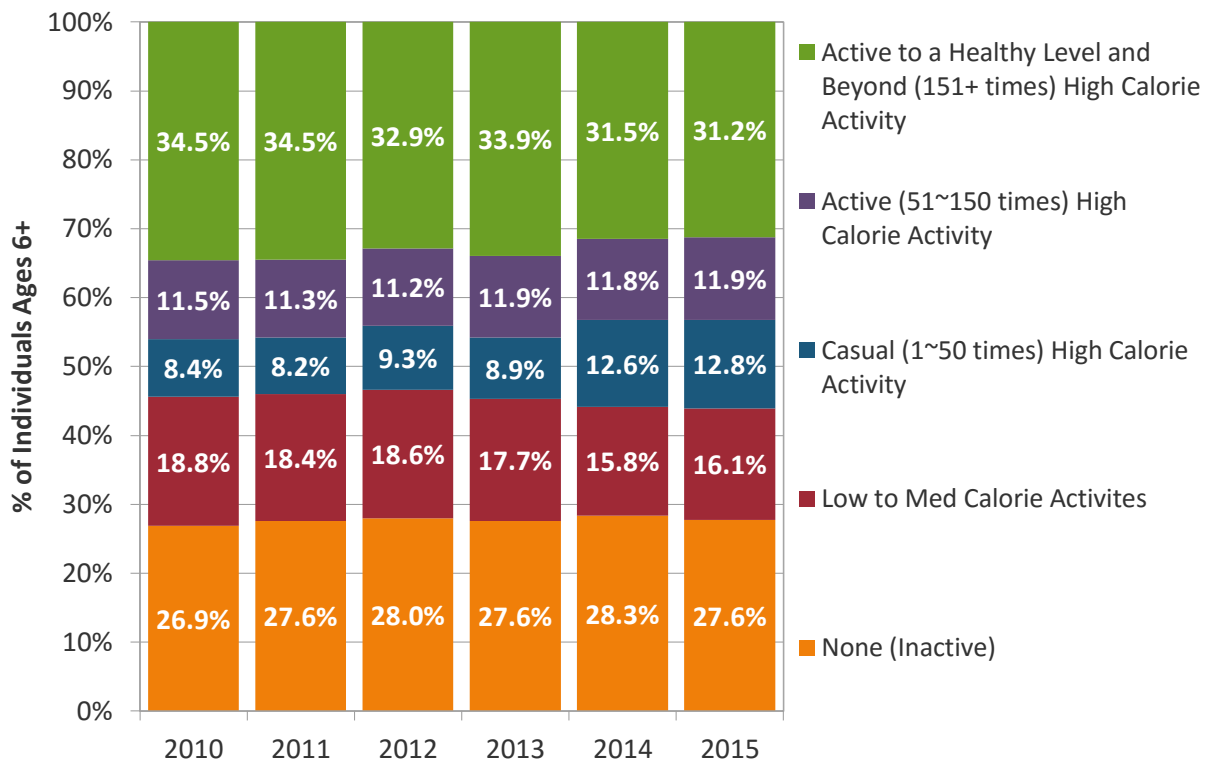
ACTIVITY LEVEL TRENDS

A breakdown of activity levels over time

Inactive to Healthy Active Across 5 years

US Population, Ages 6+

Overall, participation in sports, fitness, and related physical activities increased slightly in 2015. Many people were active, with 56% of the population ages 6 and over participating in at least one high caloric burning activity. Over the last few years, participation to a healthy level in high caloric activity has been on the decline, dropping an average of 0.6%. Both casual and active participates have increased, showing that although Americans may not be as active as often as in the past, they continue to keep moving at some level of fitness.



2010 – 2015 PARTICIPATION TRENDS

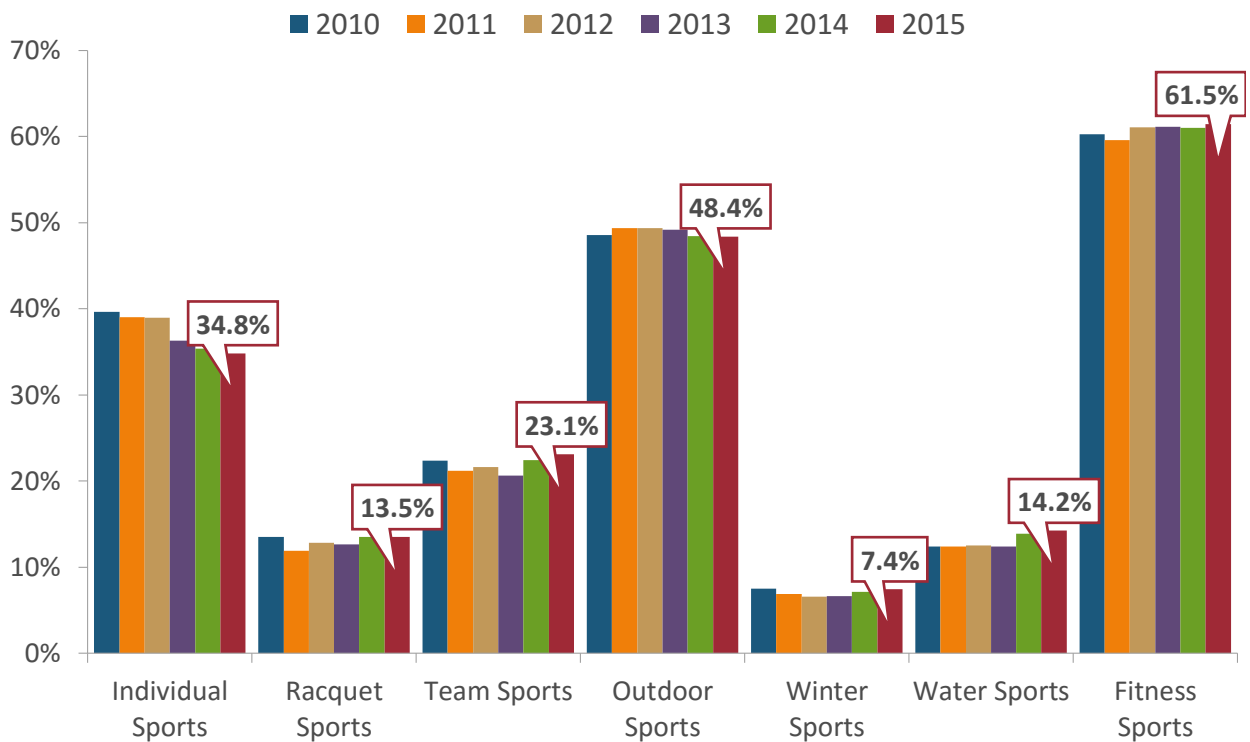
A look at physical activity participation by year

Total Participation Rate by Activity Category

US Population, Ages 6+

When it comes to being active, most of the population prefers a form of fitness followed by outdoor activities. While both winter and water sports are only participated in by less than 15% of the population, their rates have increased over the past year. Both outdoor and racquet sports remain flat and individual sports show a decrease. This decrease has been a continuing trend since 2012, decreasing, on average, 1% over the last 5 years.

Participation Rates: % of Individuals Ages 6+



*Winter Sports are based on season

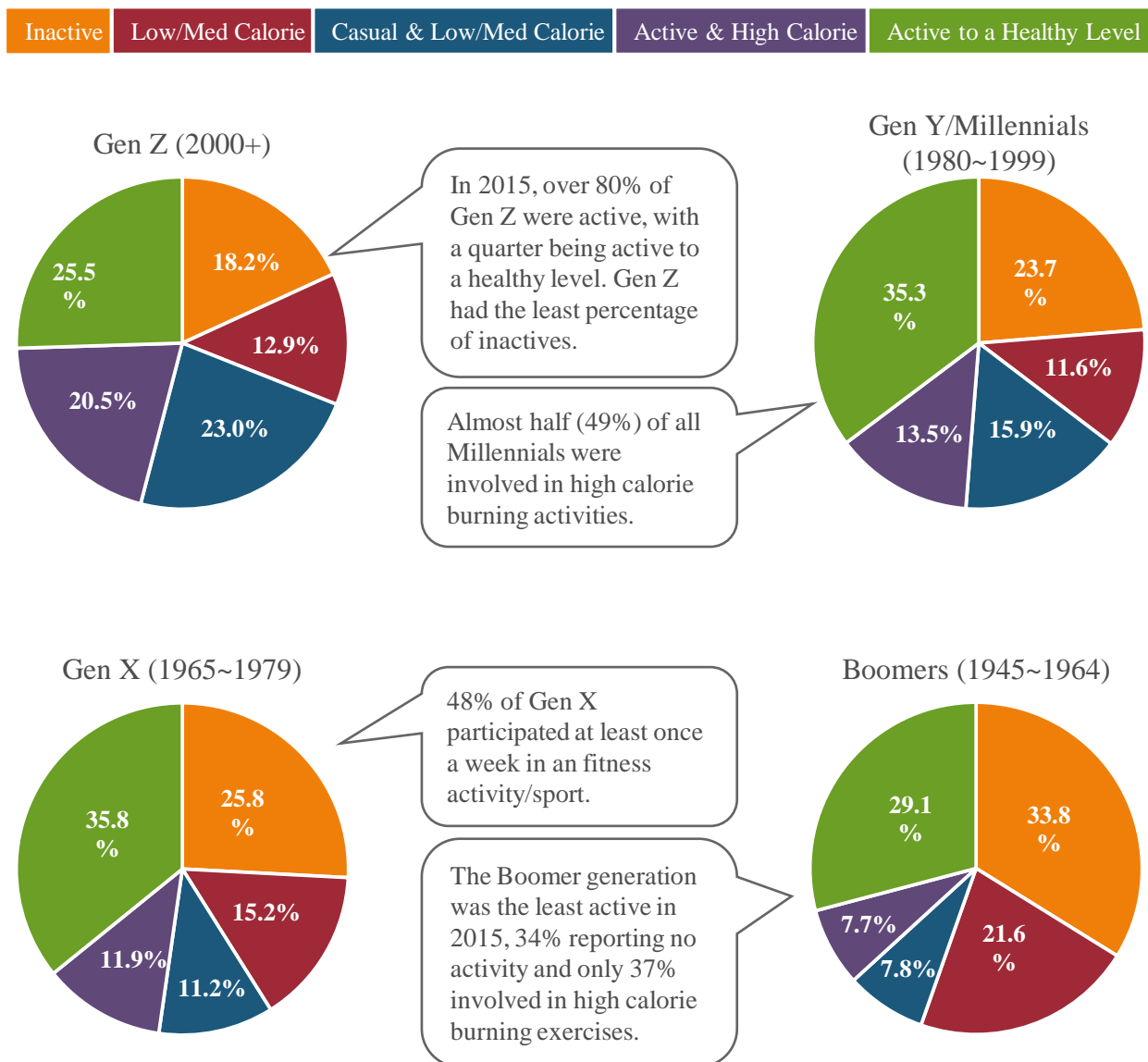
*See Appendix for breakdown of sports included in each category

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+)

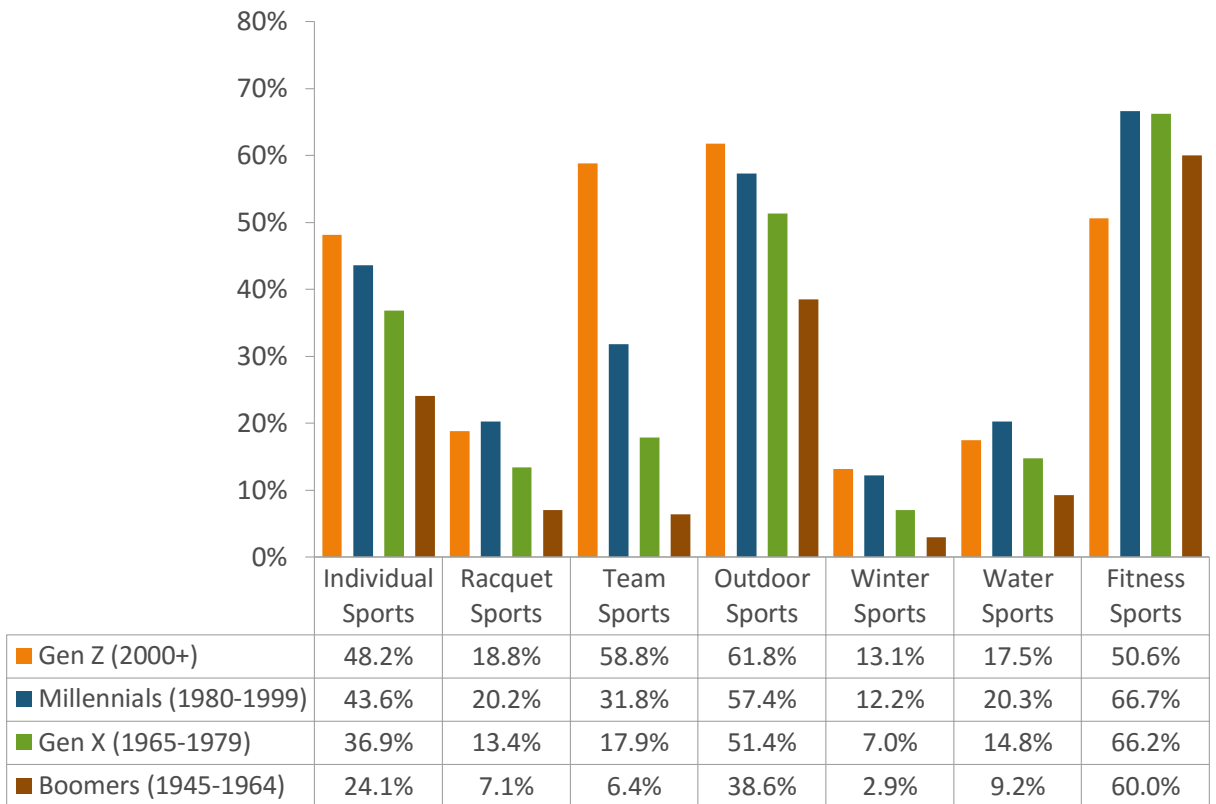
PARTICIPATION BY GENERATION

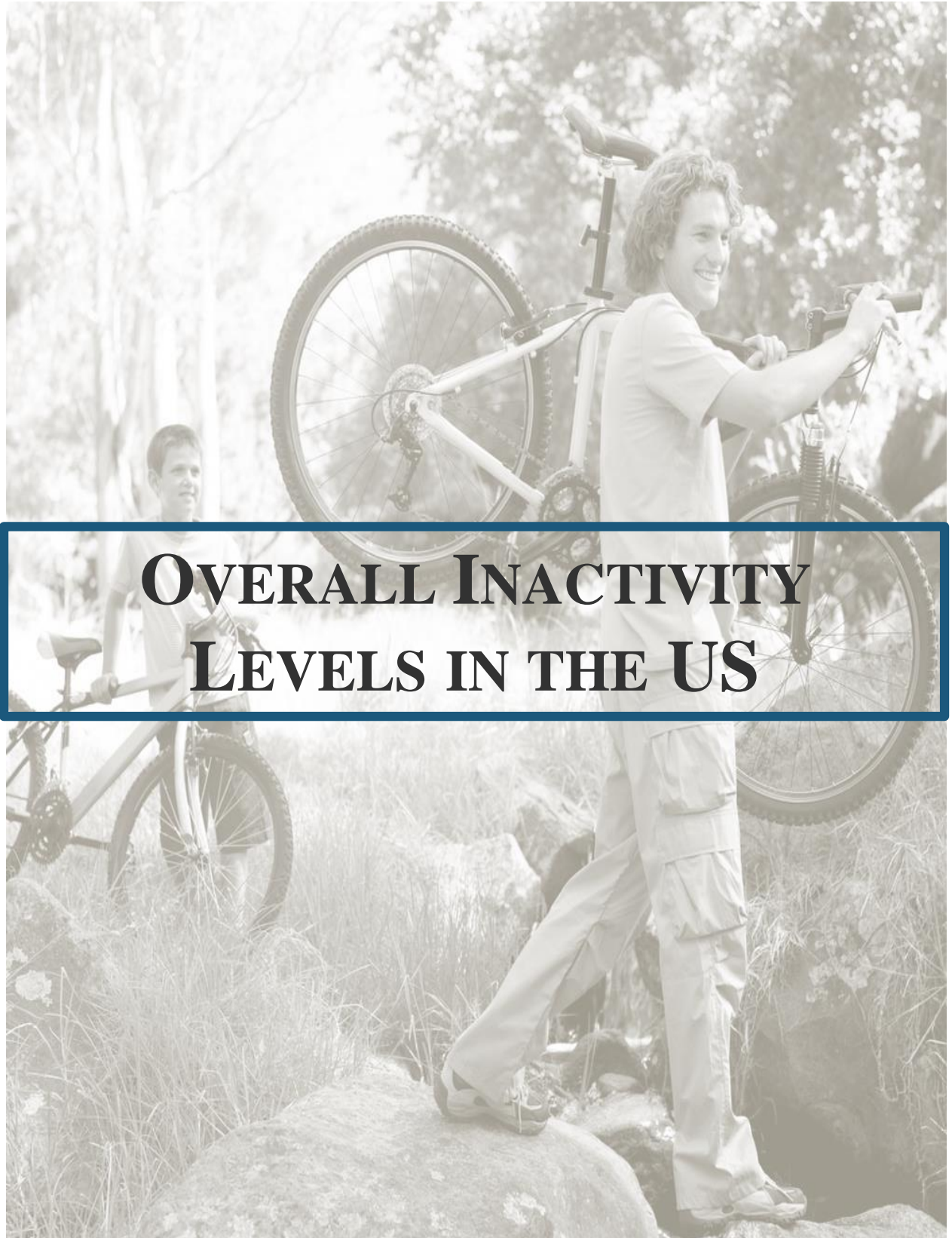
Types of participation by generation

Activity Category Segmented by Generations

US Population, Ages 6+

When it comes to being active, the Gen Z population prefer outdoor sports (62%) and team sports (57%), being the highest participation rate in both categories compared to other generations. Millennials participate in more water sports and fitness sports, while Boomers are more likely to participate in fitness sports than any other type of activity.





OVERALL INACTIVITY LEVELS IN THE US

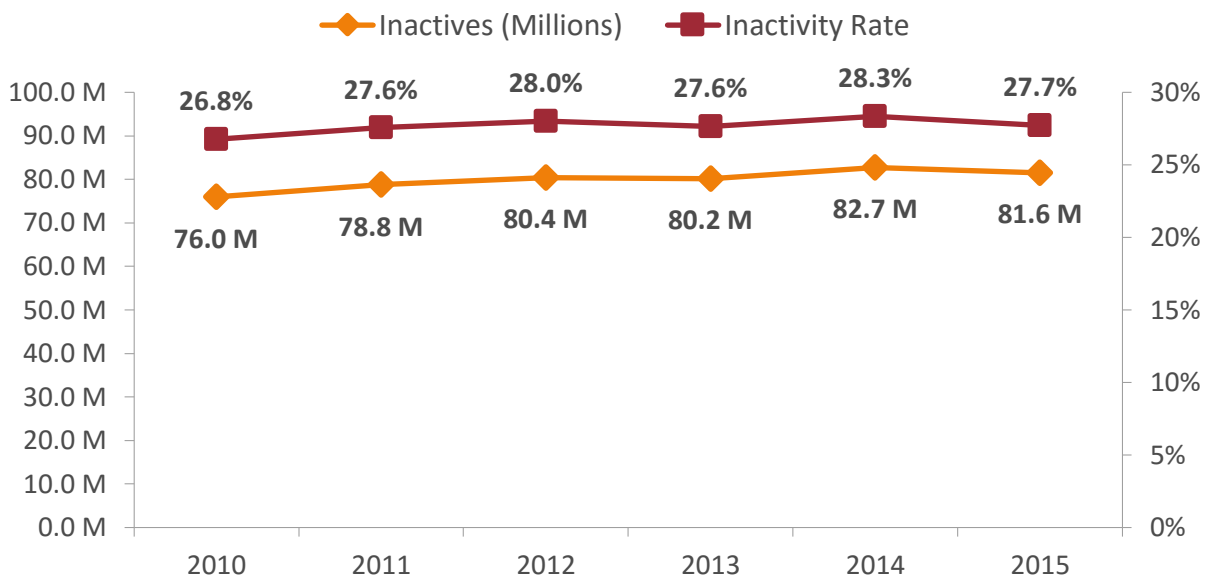
2010 – 2015 INACTIVITY TRENDS

Overall inactivity levels in the US

Inactivity Rate vs. Total Inactives

US Population, Ages 6+

Overall inactivity had dropped in 2015, going from 82.7 million people to 81.6 million over the last year. While these rates seem to fluctuate over the last five years, the 2014 to 2015 decrease (0.6%) is the largest drop since 2010. This showed that 1.2 million people who were inactive in 2014, participated in a some sort of fitness activity in 2015. Although this doesn't make up for half of the Americans who became inactive in 2014 (2.6 million from 2013), the 1.2 million additional active people in 2015 was the most gain of active people over the last five years.



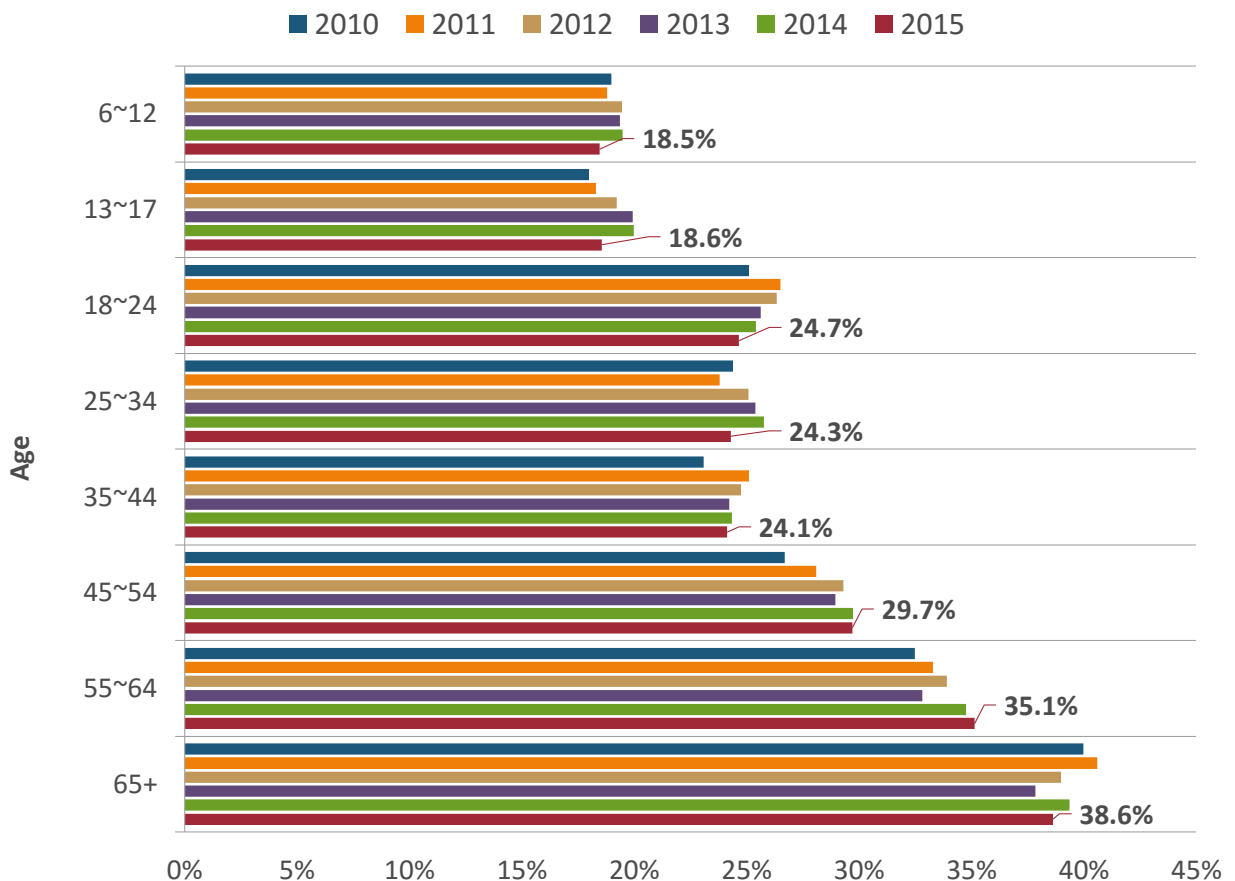
2010 – 2015 INACTIVITY BY AGE

Overall inactivity levels in the US

Inactivity Rates Segmented by Age

US Population, Ages 6+

While the highest rates of inactivity remain among those ages 65 and over, this percentage decreased 0.8% since 2014. Those between the ages of 6 to 12 have the lowest rates of inactivity, also showing a decrease of 1% since 2014. While most age groups show a slight decrease of inactivity, those ages 45 to 54 remained flat and people between the ages of 55 to 64 had a increase of 0.4%.



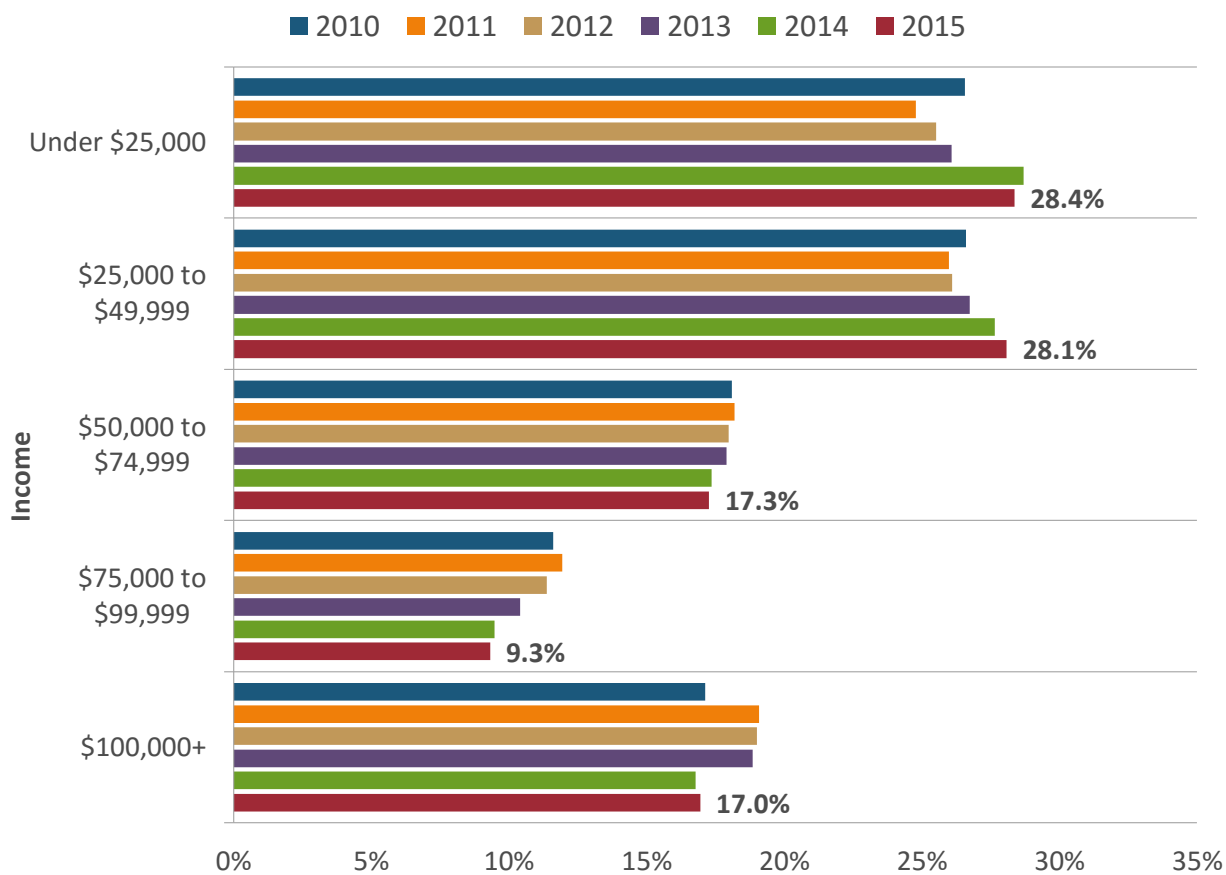
2010 – 2015 INACTIVITY BY INCOME

Overall inactivity levels in the US

Inactivity Rates Segmented by Income

US Population, Ages 6+

Inactivity rates remained higher in low income households, while the lowest rate of inactivity are within the \$75 to \$99.9K income bracket. This appears to be the trend over the last five years. People in the \$25 to \$49K income bracket had the largest increase of inactive, jumping 0.4% since 2014, while those making less than \$25K had the largest decreases (-0.3%).





SPENDING IN FITNESS

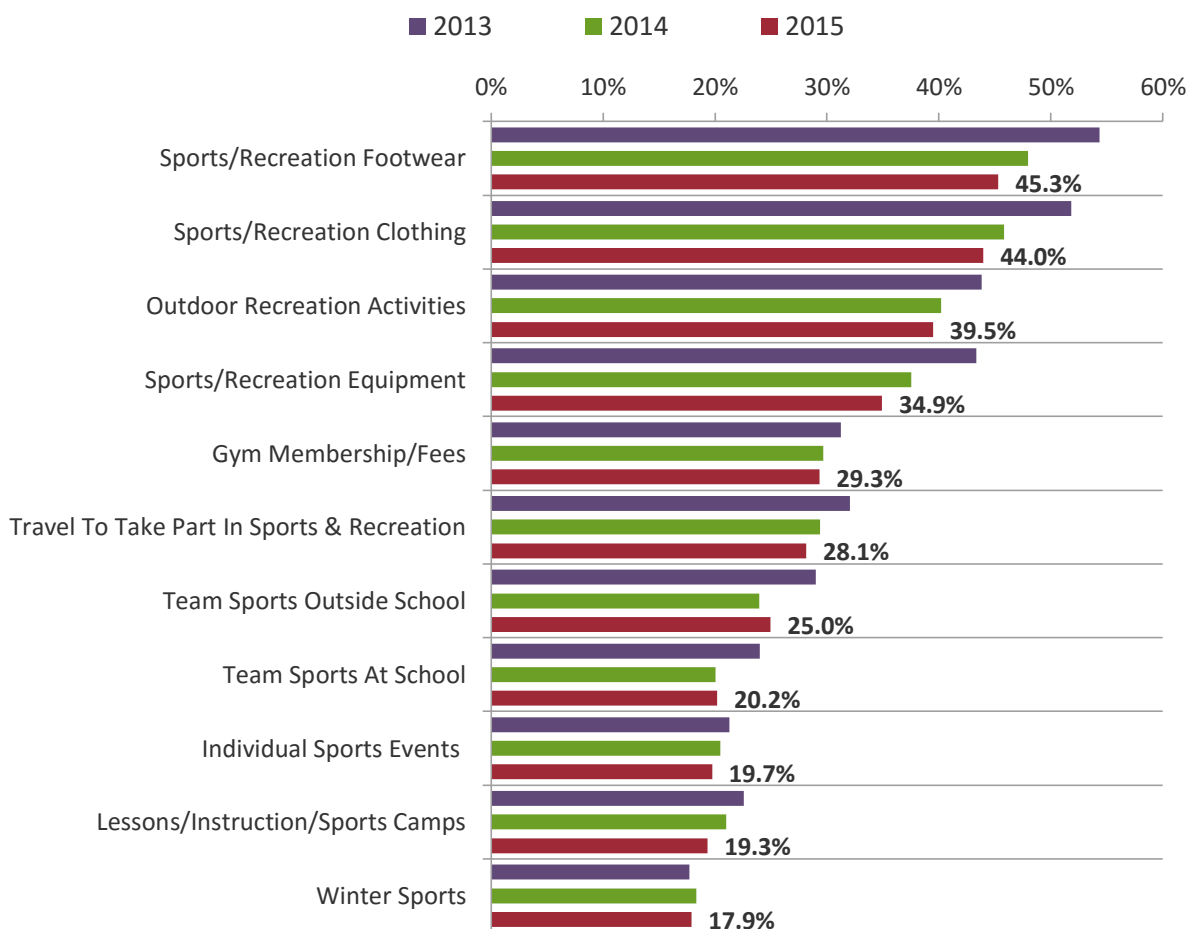
SPENDING TRENDS

Fitness and activity related spending.

Spending Over a Five Year Span

US Population, Ages 6+

Over the last three years, people are becoming more conservative with their spending. While both show a decrease since 2013, there was well over 40% of people who purchased sports/recreational footwear or clothing in 2015. Spending on team sports outside of school increased 2015, while spending on team sports at school remained flat.



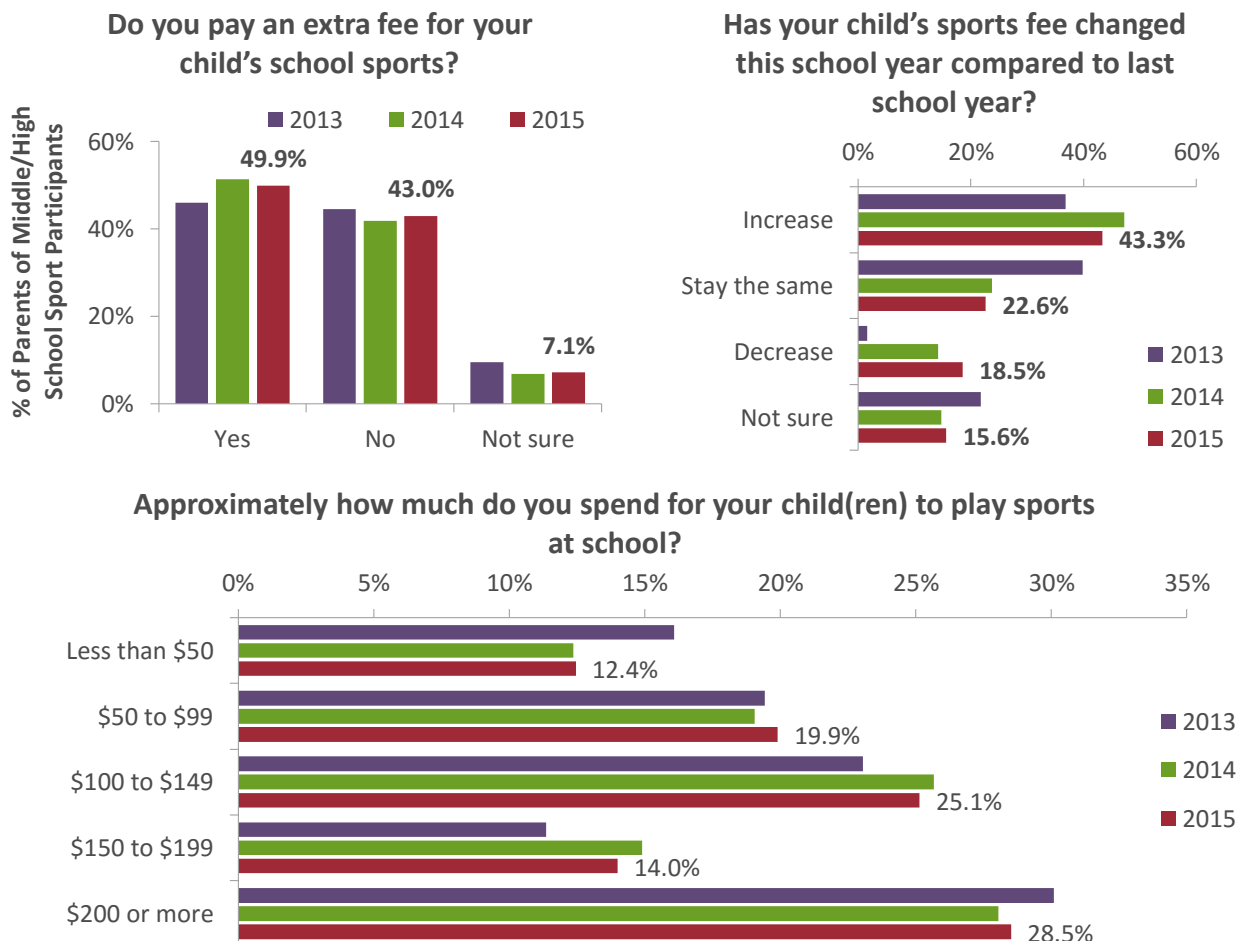
PAY-TO-PLAY

Spending for youth school sports programs

Trends in Pay-to-Play School Programs

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

Over the last three years, pay-to-play school programs has seen decreases in sports fee compared to the previous year. While this is a positive move for school sponsored team sports, 43% of parents reported an increase from 2014 to 2015. Since 2013, 67% of parents, on average, spend over \$100 on their children's school sports fees.



PURCHASES TO ENCOURAGE FITNESS

A look at spending on ways to track fitness

Tracking Health and Fitness Progress

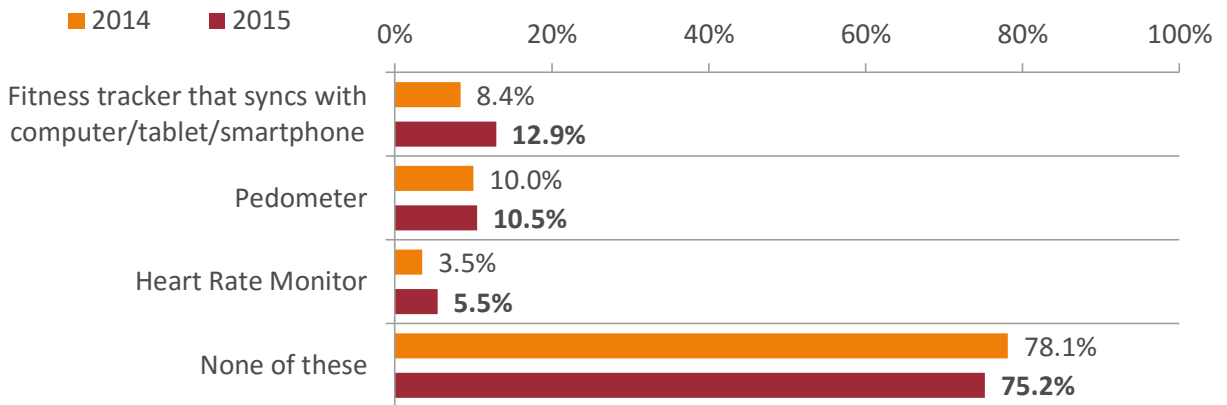
In 2015, did you purchase and/or use a discounted deal for a fitness/sport activity from an online source?

Yes- purchased and used	8.3%
Yes- purchased but did not use	1.9%
Did not purchase	89.8%

Just about 10% of active participants purchased a discounted fitness coupon through an online site like Groupon or Living Social. Of these 10%, more than 80% used the coupon in 2015.

Do you own a wearable device for fitness tracking?

Interest in wearing technology that tracks an individual's fitness has increased over the year. While run of the mill pedometers and heart rate monitors have slightly gained usage, more people are purchasing syncable technology. Many of the syncable technology include both a pedometer and heart rate monitor as well as a way to track sleeping patterns and calories expended.



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%

Since 2014, interest in purchasing and using wearable technology has increased. For those who are active, 12.5% reported wanting to purchase a fitness tracker, up 3.2% from 9.3% reported in 2014.



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

All age groups reported a high interest in swimming for fitness. For ages 6 to 54, they report camping and bicycling in the top three, showing that more Americans are interested in getting outside and being in natural settings. Those aspirational participants ages 6 to 12 had more interest in team sports, while those who are older showed more interest in fitness and outdoor activities.

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

Interest Level	Ages 35~44	Ages 45~54	Ages 55~64	Ages 65+
1	Camping	Camping	Bicycling	Birdwatch/Wildlife Viewing
2	Swimming For Fitness	Swimming For Fitness	Swimming For Fitness	Swimming For Fitness
3	Bicycling	Bicycling	Camping	Working Out w/Machines
4	Hiking	Hiking	Birdwatch/Wildlife Viewing	Fishing
5	Working Out w/Weights	Working Out w/Machines	Hiking	Hiking
6	Working out w/Machines	Fishing	Fishing	Bicycling
7	Running/Jogging	Birdwatch/Wildlife Viewing	Working Out w/Machines	Fitness Classes
8	Fishing	Canoeing	Working Out w/Weights	Working Out w/Weights
9	Canoeing	Working Out w/Weights	Canoeing	Camping
10	Backpacking	Backpacking	Fitness Classes	Canoeing

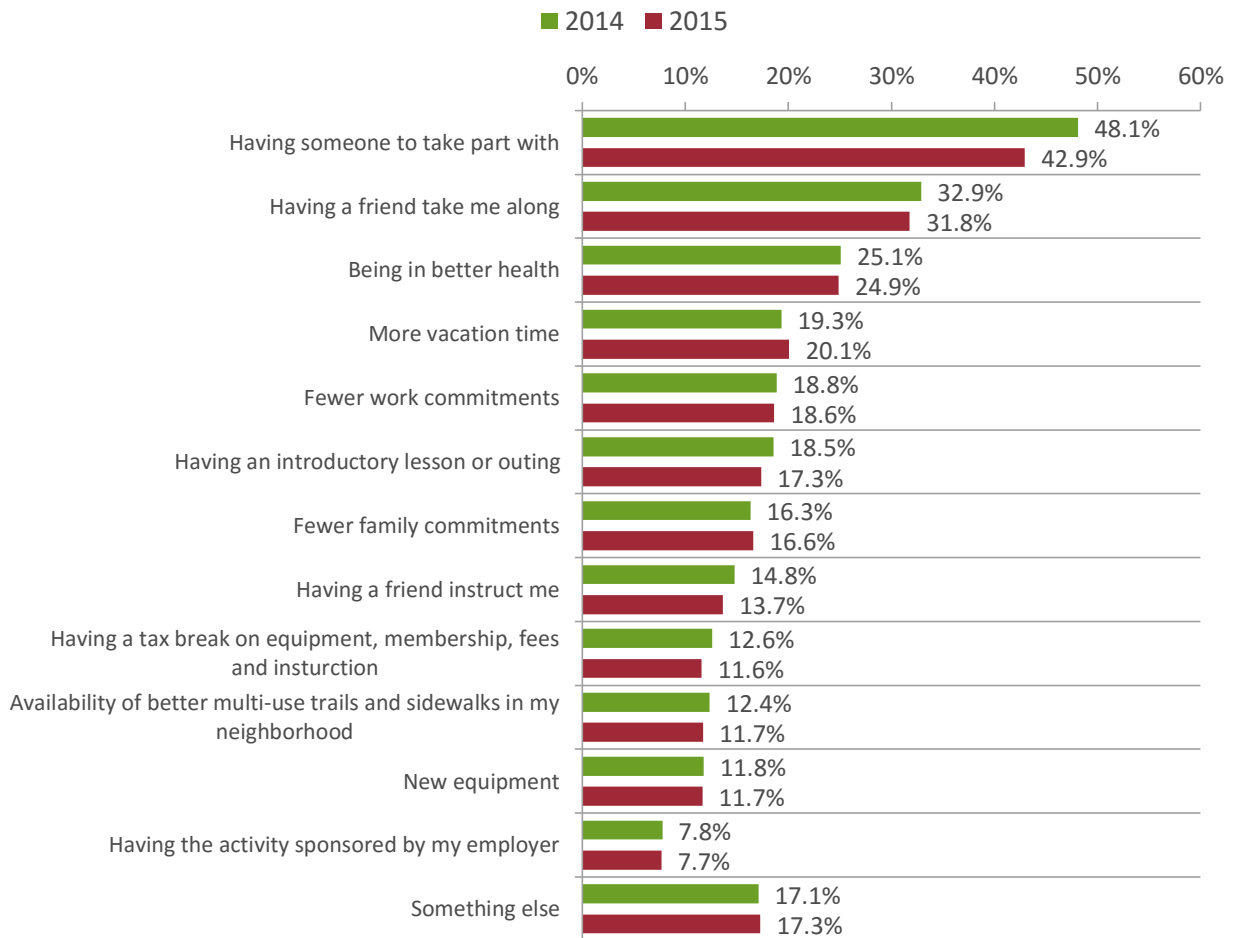
NON-PARTICIPANT INTEREST

What would help non-participants involved

Ways to Get a Non-participants Involved in Activities

"Aspirational" Sports Participation by Age

Over the last two years, the aspirational participant reports that having someone to take part in an activity with would be the big push to get them involved. Having a friend take them along to a fitness activity was also mentioned. These two reasons show that people not only prefer to workout or participate in sports with friends, it is a driving force to get them out more and experience different ways to be physically active.



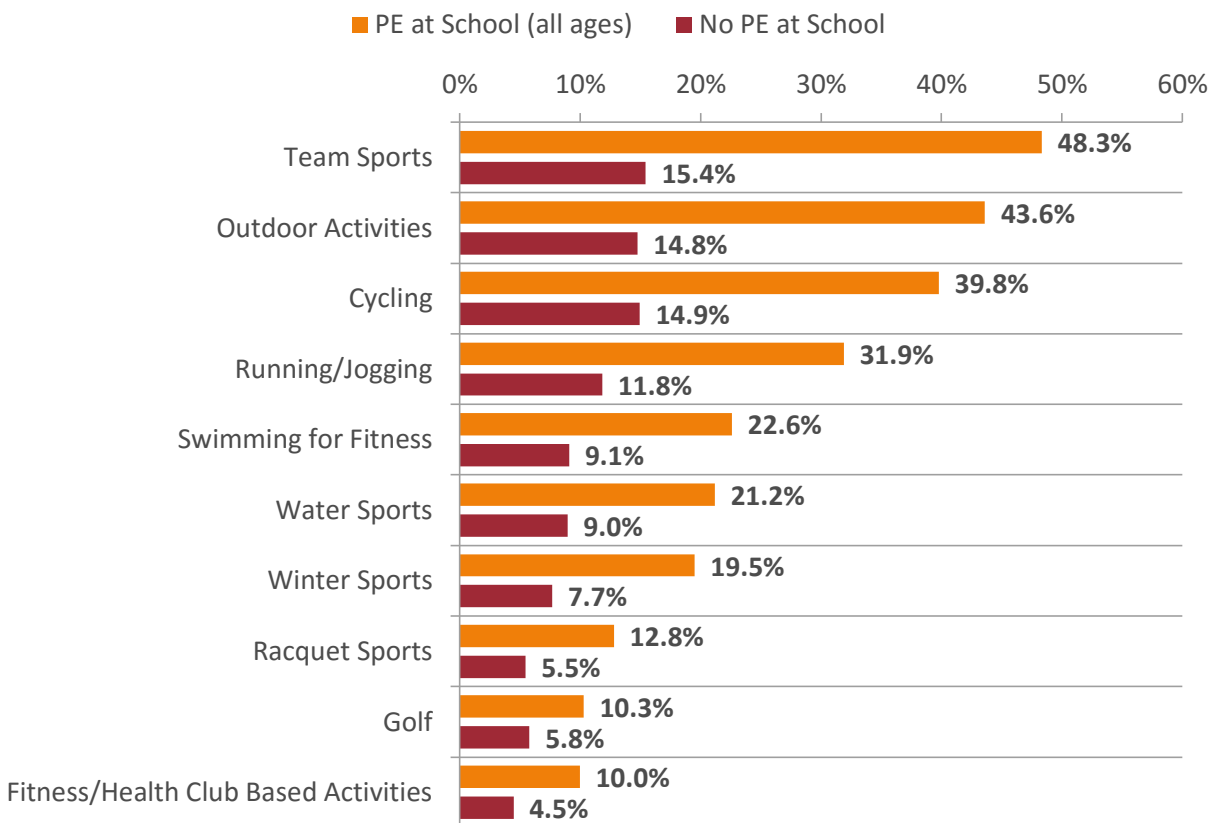
THE PE PATHWAY

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 physical exercise during school had a extreme impact on participation in other activities. This shows that participants ages 18+ who had PE while in grade school and high school, were two to three times more likely to also engage in team sports, outdoor activities, cycling, or running/jogging and other activities during that same time. Almost half said that team sports was an additional activity. While those who did not have PE, only 15% also participated in team sports, outdoor activities, or cycling.



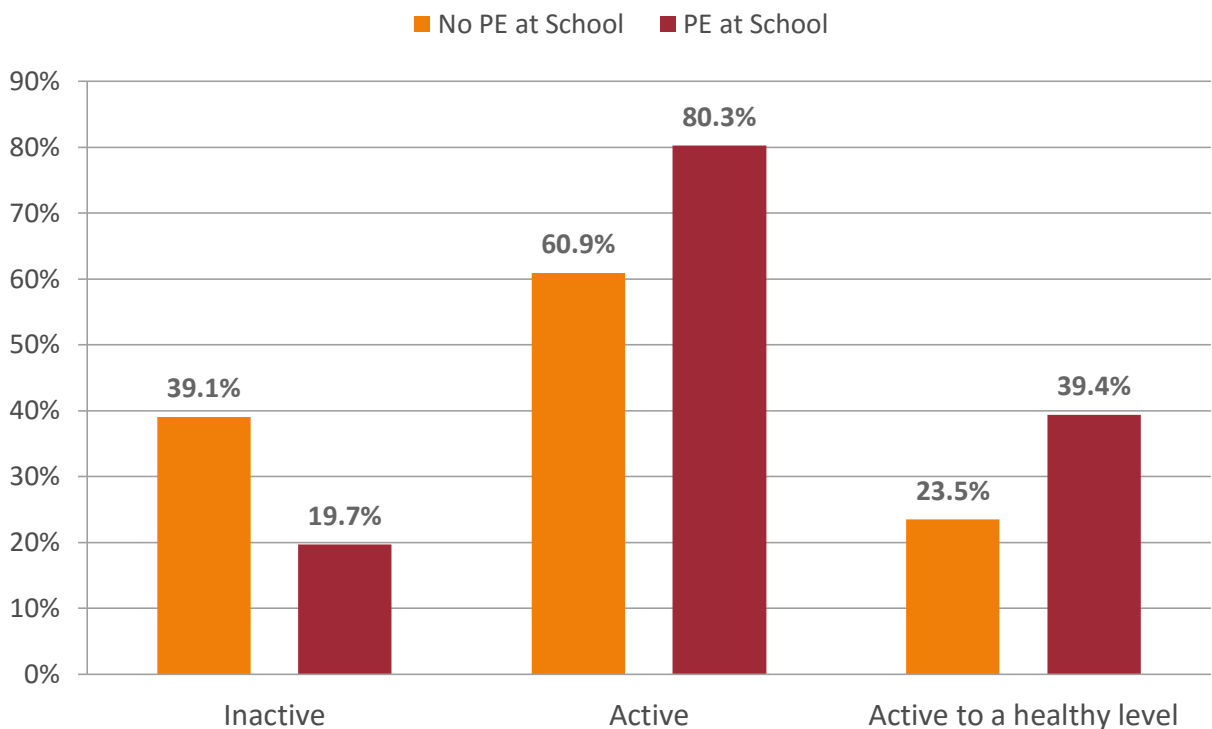
THE PE PATHWAY

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 it comes to the influence of PE on sport/activity participation in adulthood, the effects are amazing. Of adults ages 18 and over who reported having PE in school, 80% said they were active in 2015 and 39% were active to a healthy level (151+ times a year). While those who didn't have PE, only 61% reported activity and less than a quarter participated 151 times or more in 2015.



APPENDIX

List of sports/activities in grouped category

Fitness Activities: Aerobics (High Impact/Intensity & Training), Dance, Step and Other Choreographed Exercise to Music, Cardio Kickboxing, Cardio Cross Trainer, Elliptical Motion Trainer, Row Machine, Stationary Cycling (Group, Recumbent, Upright), Stair-Climbing Machine, Treadmill, Aquatic Exercise, Boot-Camp Style Training, Calisthenics, Cross-Training Style Workouts, Barre, Pilates Training, Stretching, Tai Chi, Yoga, Abdominal Machine/Device, Free Weights (Barbells, Dumbbells, Hand Weights), 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).

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

While proper due care and diligence has been taken in the preparation of this document, the Physical Activity Council cannot guarantee the accuracy of the information and does not accept any liability for any loss or damage caused as a result of using information or recommendations contained within this document.

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