



# 2013 Participation Report



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

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# METHODOLOGY

## Method for the Participation Report

This Overview Report from the Physical Activity Council (PAC) is produced by a partnership of six 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 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 January and February of 2013, a total of 42,356 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 Synovate/IPSOS. A total of 15,770 individual and 26,593 household surveys were completed. The total panel is maintained to be representative of the US population for people ages 6 and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2012 participation survey sample size of 42,356 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 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants.

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 287,138,000 people ages six and older.

In this year's report we have changed the definition of "inactivity." In the past, we had included only those participants who report no activity in any of the 126 activities listed for the data year. This year we included 19 sports/fitness activities that require minimal to no physical exertion. We also added a "calorie burning" component.

If you have specific questions, please get in touch with Sports Marketing Surveys USA at [usa@sportsmarketingsurveysusa.com](mailto:usa@sportsmarketingsurveysusa.com) or (561) 427-0647.

For more information on the following activities please contact:

- ▶ CLUB/INSTITUTIONAL FITNESS: International Health, Racquet and Sportsclub Association (IHRSA) [www.ihrsa.org](http://www.ihrsa.org) P: (617) 951-0055
- ▶ GOLF: The National Golf Foundation (NGF) [www.ngf.org](http://www.ngf.org) P: (561) 744-6006
- ▶ OUTDOOR: The Outdoor Foundation (OF) [www.outdoorfoundation.org](http://www.outdoorfoundation.org) P: (202) 271-3252
- ▶ SNOWSPORTS: The Snowsports Industries America (SIA) [www.snowsports.org](http://www.snowsports.org) P: (703) 556-9020
- ▶ TEAM SPORTS / INDIVIDUAL SPORTS / GENERAL FITNESS / WATERSPORTS: The Sports and Fitness Industry Association (SFIA) [www.sfia.org](http://www.sfia.org) P: (301) 495-6321
- ▶ TENNIS: The Tennis Industry Association (TIA) and United States Tennis Association (USTA) [www.tennisindustry.org](http://www.tennisindustry.org) P: (843) 686-3036

# INTRODUCTION

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## Inactivity Increases but 33% of Americans are Active to a Healthy Level

- ▶ The Physical Activity Council’s annual study continues to track participation in over 120 sports. This report gives a broad overview to the study. For more details on specific sports please contact the relevant PAC Partner (see Methodology).
- ▶ Our new definition of inactivity has broadened to mean “inactives” are those who don’t take part in any “active” sport. Using this new definition, there are 80.4 million “inactives.” This has increased slightly from 78.9 million in 2011. However, there is an indication that the rate of increase in inactivity is slowing down.
- ▶ While much is written about inactivity, the flip side is that there are 206.7 million “active” Americans age 6 and older. Of course there are various levels of activity and we have classified this by grouping the activities into low, medium and high calorie burning activities. We combined this with participation frequency to see how many Americans take part in a high calorie activity three or more times a week – or to what we have called “Active to a Healthy Level.” Using this definition, we estimate 33% of Americans age 6 and older are active to a healthy level (or 94.8 million individuals).
- ▶ Generation Z, or those born in 2000 or after, can now be analyzed in significant numbers so we have included them in the generation analysis for the first time. Participation levels are high for this age group (6 to 12 year olds) having over 50% take part in team sports and outdoor activities.
- ▶ The PAC study also tracks overall spending by category. Spend levels in 2012 were generally higher than in 2011. Of particular interest is the increasing spending on team sports at school. Over half the parents of middle school/high school sports participants pay an extra fee for school sports and over half of these say fees have increased in the last year. Almost 70% of these parents pay more than \$100 for school sports. We will track this going forward to monitor the impact on team sports participation.
- ▶ In terms of aspirational sports, swimming, fitness and outdoor activities feature high on the list for most adult age groups. Team sports are also important for the younger age groups.

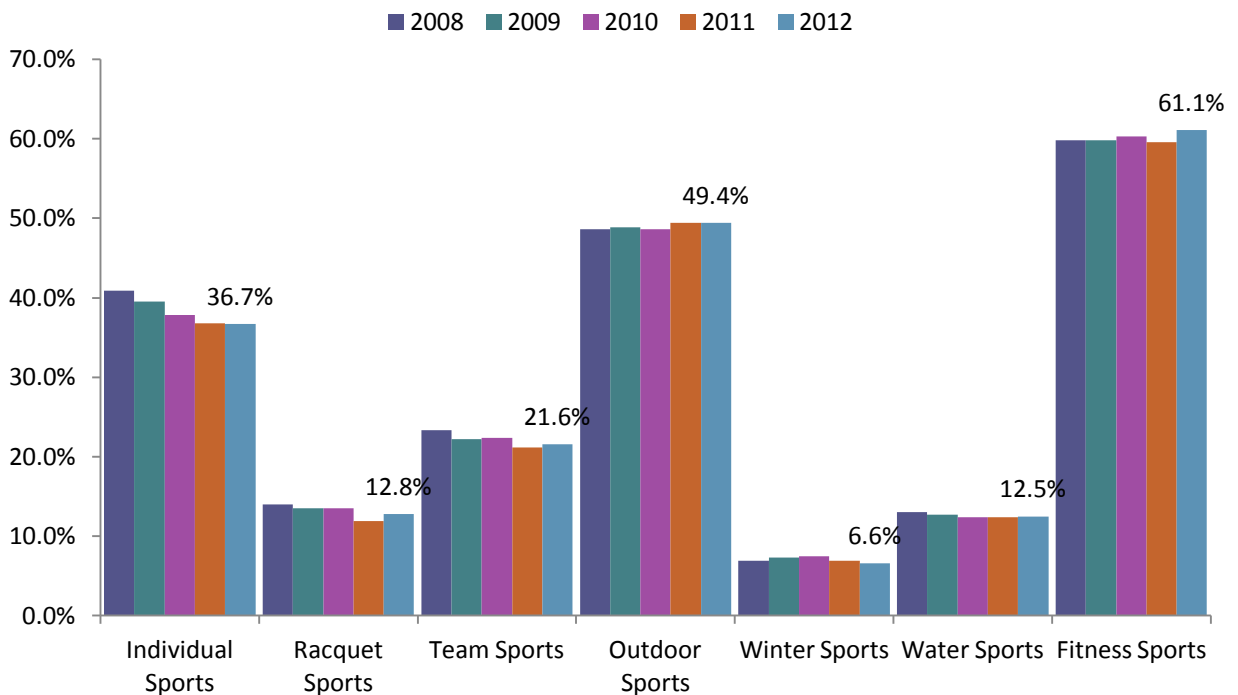
# 2008 – 2012 PARTICIPATION TRENDS

US Participants, Ages 6+

## Total Participation Rate by Sport

Overall participation in sports, fitness and related physical activities remained relatively steady from 2011 to 2012. Fitness Sports had the largest increase of two percent, regaining the previous year 1% loss. Racquet Sports followed with a 1% increase but still remains below the 2008 peak rate of 14%. Both team and water sports slightly increased where individual and winter sports slightly decreased.

### Participation Rates: % of Individuals Ages 6+



Note: This measure of winter sports does not include motorized winter sports.

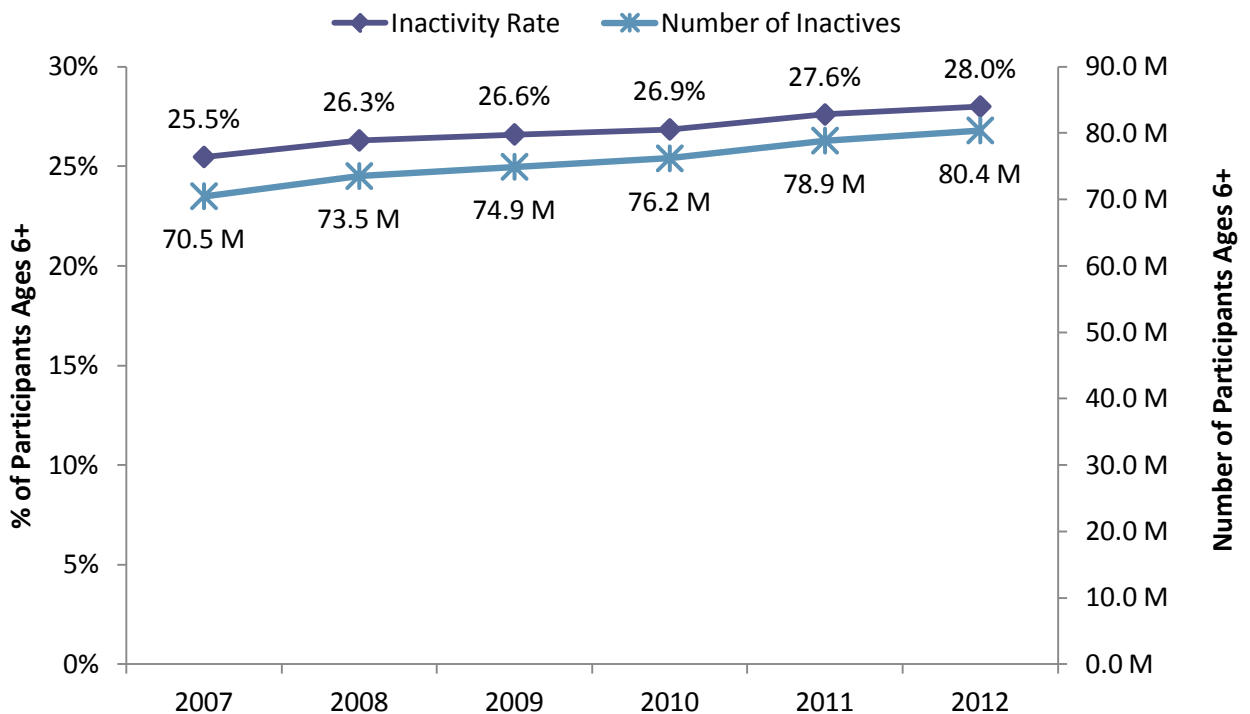
# INACTIVITY RATES

US Participants, Ages 6+

## Inactivity Levels in the US

As efforts to increase awareness about the benefits of being active are put into play, inactivity continues to be a dominating force. Twenty-eight percent of all Americans are inactive, this is less than 1% increase from last year. However, this increase is still less than the average rate increase over the past 5 years. Even though the levels of inactivity continue to rise, the rate is slowing down.

To better understand inactivity rates, we changed the definition to include 19 sports/activities that are categories as needing minimal to no physical exertion. These include darts, billiards/pool, etc.

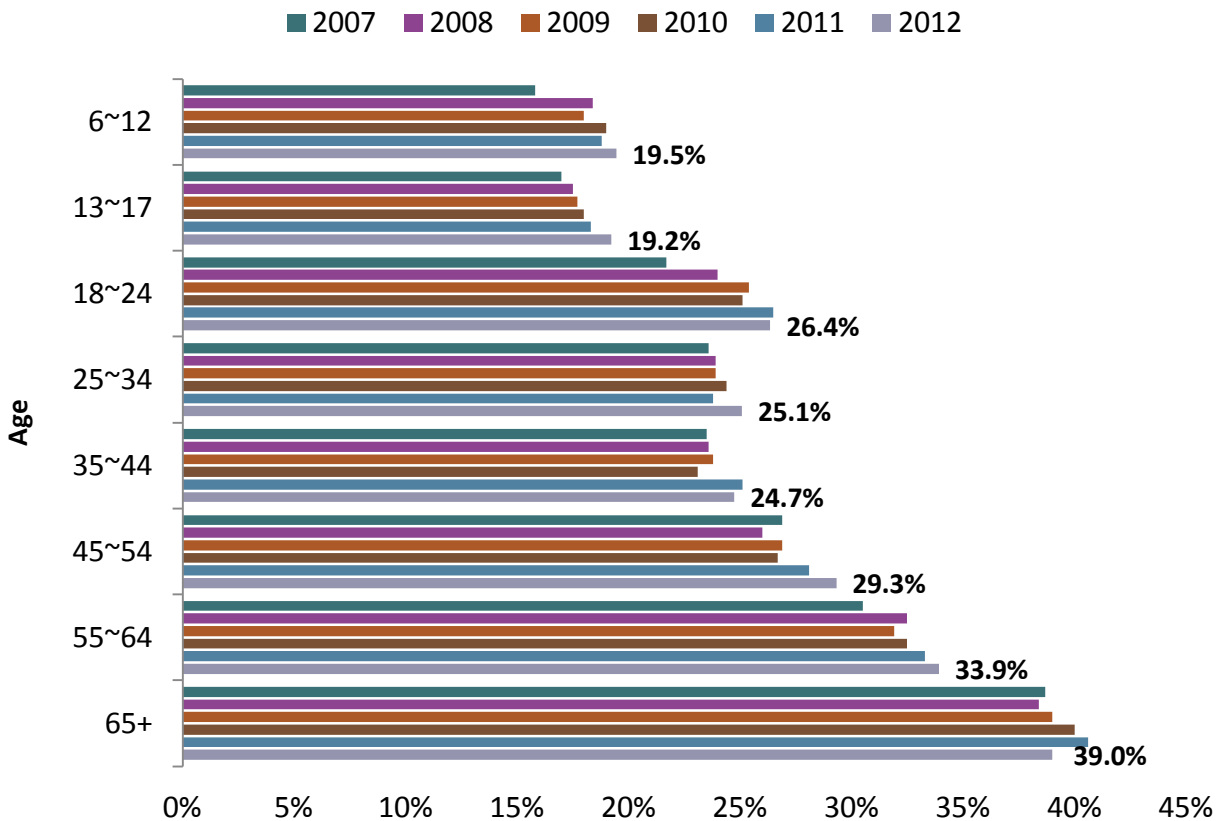


# INACTIVITY BY AGE

US Participants, Ages 6+

## Inactivity Levels in the US

Inactivity rates have increased in almost all age groups particularly in the younger age groups and the “time-crunched” middle ages 45 to 64. Both of the younger age groups show the highest level of inactivity in the 6 years covered. College age individuals and those age 65 plus both showed decreases in inactivity. The over 65s are likely to have more time than those heavily involved in work activity.



# ACTIVE PARTICIPANTS

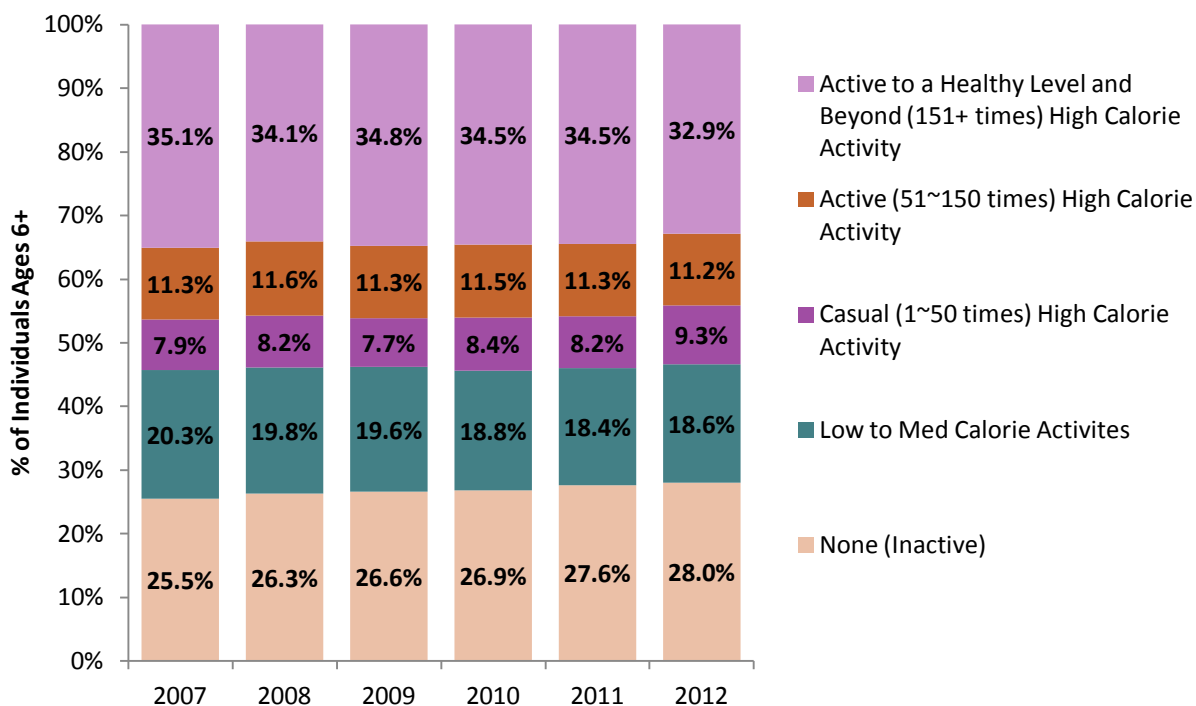
US Participants, Ages 6+

## Participation to a Healthy Level

This year, for the first time, a “calorie” component was added to the analysis. The chart below incorporates the frequency of activities with the calorie level from each activity.

A healthy level of participation includes those participants who reported engaging in a high calorie level sport and fitness activities on a frequent basis (151+ times per year). There was a slight decrease of highly active participation from 2011 where rates had remained flat since 2009.

Using this definition we have identified 33% of Americans that are active to a healthy level. This is 94.8 million individuals age 6 and older.



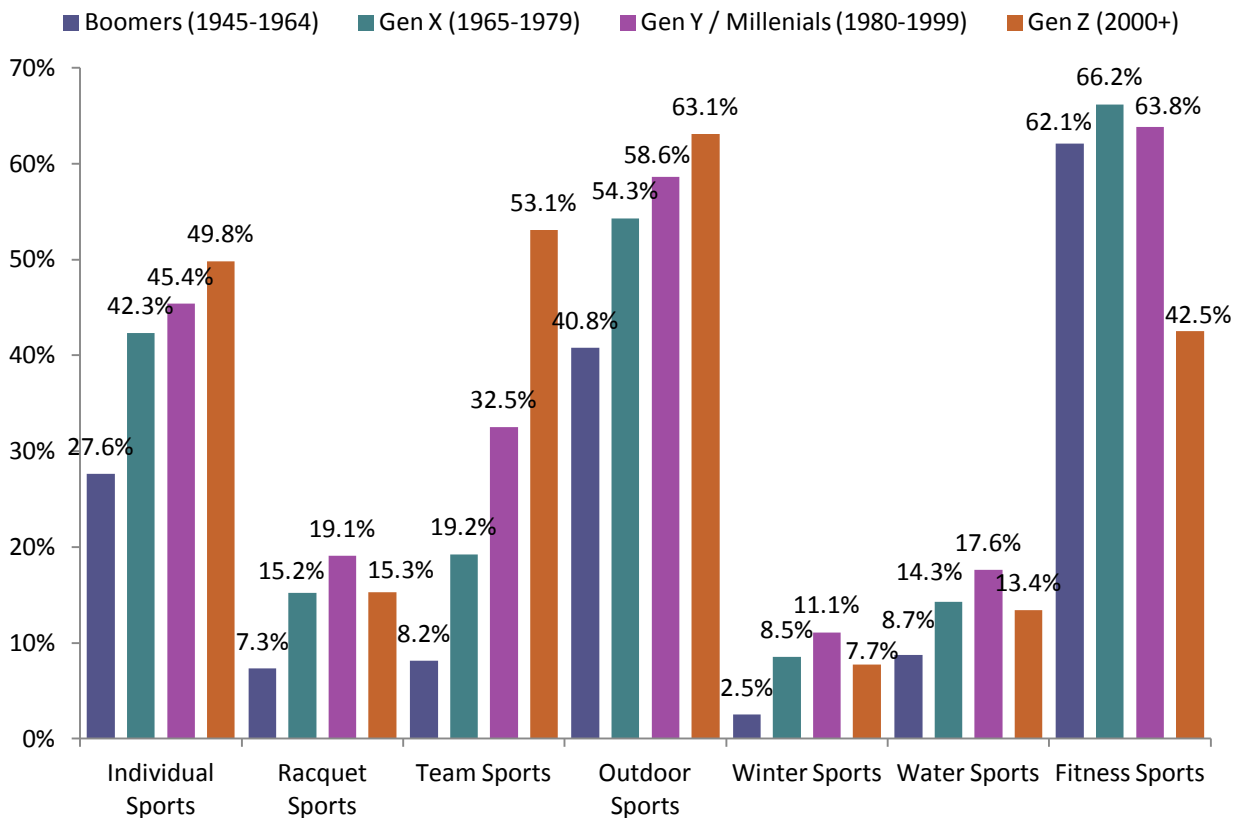


# PARTICIPATION BY GENERATION

US Participants, Ages 6+

## A Breakdown of Participation Rates by Generation

For the first time this year, we have included Generation Z in the generation analysis. These are individuals who were born in 2000 or later, so they are currently age 6-12. They are an important group as a marker to future levels of activity and an indication of the establishment of future habits. Although Gen Z is still a relatively small group numerically, participation rates for Gen Z are generally good and are highest for outdoor, team and individual sport.



Note: This measure of winter sports does not include motorized winter sports.

# GEOGRAPHY OF PHYSICAL ACTIVITY

US Participants, Ages 6+

## Participation Across the U.S.

In line with the previous studies the most active states include Colorado and Utah. The states with relatively low levels of healthy include a group of states in the south, Oklahoma, Arkansas and Mississippi.

**Active to a Healthy Level:** Participation in a high calorie sport/activity at least 151+ times a year, which include all cardio group based activities, cardio machine, running, swimming fitness, cycling, team sports, track, racquet sports, climbing, trail running, boxing, martial arts, boot camp.



Note: Top 39 States only with base of 1000+

# SPENDING TRENDS

US Participants, Ages 6+

## Spending in 2012 Compared to 2011

As the net average spending increased in 2012 from 2011, most Americans spent about the same on sports and recreation in 2012. Winter sports spending decreased, which is expected due to a poor winter season. However, spending on school team sports increased reflecting the trend towards Pay-to-Play programs in school.

	2011				2012			
	More	Same	Less	Net *	More	Same	Less	Net *
Team Sports at School	5.2%	14.1%	4.1%	<b>4.7%</b>	6.3%	15.9%	3.8%	<b>9.6%</b>
Team Sports Outside School	5.9%	17.6%	5.0%	<b>3.1%</b>	6.6%	18.9%	5.2%	<b>4.6%</b>
Travel To Take Part In Sports & Recreation	6.3%	20.6%	6.5%	<b>-0.6%</b>	5.9%	20.6%	6.5%	<b>-1.8%</b>
Lessons/Instruction/Sports Camps	5.0%	11.6%	3.8%	<b>5.9%</b>	5.0%	13.3%	4.2%	<b>3.5%</b>
On Gym Membership/Fees	6.1%	17.8%	5.3%	<b>2.7%</b>	6.4%	18.1%	6.0%	<b>1.3%</b>
Individual Sports Events	3.3%	11.0%	3.6%	<b>-1.7%</b>	4.4%	12.7%	4.3%	<b>0.5%</b>
Tennis Membership/Fees	0.8%	5.4%	1.4%	<b>-7.9%</b>	1.8%	7.7%	2.0%	<b>-1.7%</b>
Winter Sports	2.0%	9.9%	4.4%	<b>-14.7%</b>	2.7%	11.5%	4.0%	<b>-7.2%</b>
Outdoor Recreation Activities	6.7%	32.3%	7.3%	<b>-1.3%</b>	7.3%	32.1%	7.1%	<b>0.4%</b>
Sports/Recreation Clothing	9.0%	34.2%	8.5%	<b>1.0%</b>	9.4%	33.8%	9.0%	<b>0.8%</b>
Sports/Recreation Footwear	9.5%	36.8%	8.2%	<b>2.4%</b>	9.7%	36.1%	8.9%	<b>1.5%</b>
Sports/Recreation Equipment	7.7%	27.9%	8.4%	<b>-1.6%</b>	7.6%	27.1%	9.0%	<b>-3.2%</b>

\* Net is calculated by taking the % spending more less those spending less but re-based for just those spending

# PROJECTED SPENDING

US Participants, Ages 6+

## Spending Plans for 2013 Compared to 2012

Spending plans don't always materialize but it is useful to look at intentions and compare with previous studies. Overall, Americans plan to spend more in 2013 than they had predicted to spend in 2012. Spending on team sports at school and lessons/instructions/sports camp is set to increase as it has for the past two years.

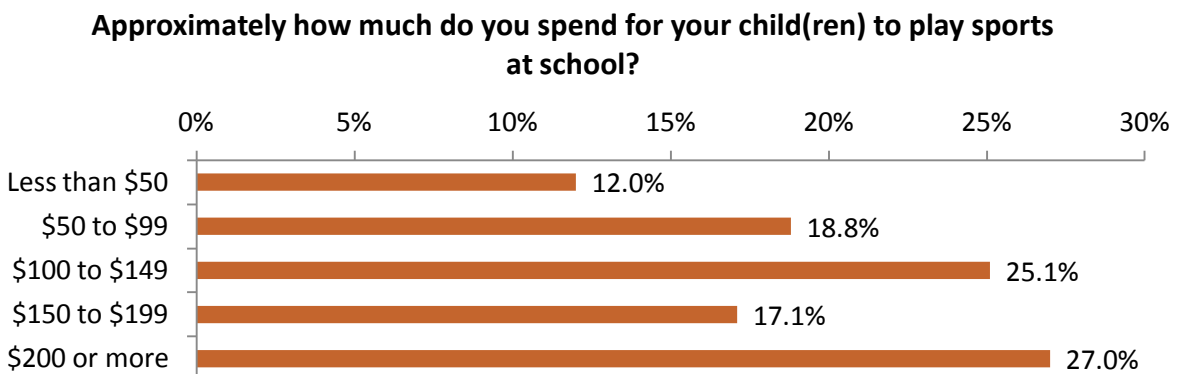
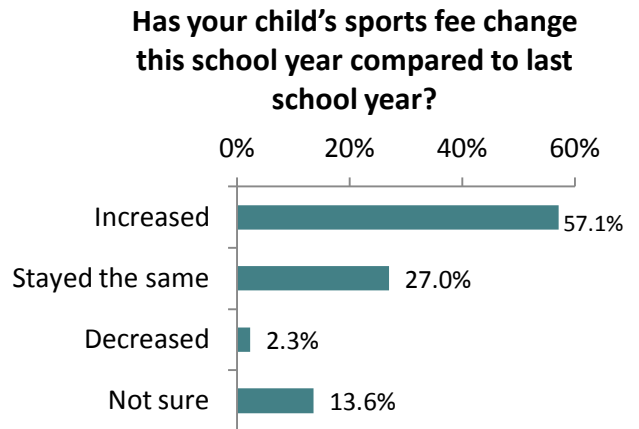
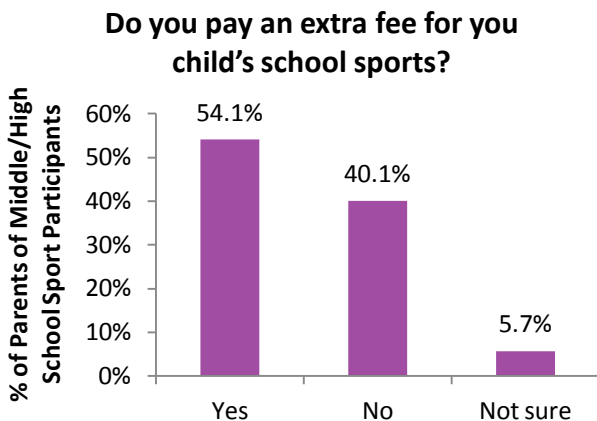
	Projected Spending for 2012				Projected Spending for 2013			
	More	Same	Less	Net	More	Same	Less	Net
Team Sports at School	5.6%	15.9%	3.1%	<b>10.2%</b>	6.6%	17.3%	3.1%	<b>13.0%</b>
Team Sports Outside School	6.3%	19.3%	3.6%	<b>9.3%</b>	7.5%	20.2%	3.7%	<b>12.1%</b>
Travel To Take Part In Sports & Recreation	7.6%	21.7%	4.5%	<b>9.2%</b>	8.1%	22.0%	4.5%	<b>10.4%</b>
Lessons/Instruction/Sports Camps	5.6%	14.4%	2.8%	<b>12.2%</b>	6.6%	15.9%	3.4%	<b>12.4%</b>
On Gym Membership/Fees	6.4%	20.9%	3.6%	<b>9.1%</b>	7.7%	20.8%	3.9%	<b>11.7%</b>
Individual Sports Events	4.9%	13.8%	2.4%	<b>11.8%</b>	6.6%	15.3%	3.2%	<b>13.5%</b>
Tennis Membership/Fees	1.0%	7.7%	1.3%	<b>-3.0%</b>	2.2%	10.0%	2.1%	<b>0.7%</b>
Winter Sports	3.4%	12.9%	3.0%	<b>2.1%</b>	4.3%	14.0%	3.4%	<b>4.1%</b>
Outdoor Recreation Activities	9.5%	32.1%	4.2%	<b>11.6%</b>	11.9%	31.2%	4.6%	<b>15.3%</b>
Sports/Recreation Clothing	9.0%	37.7%	7.7%	<b>2.4%</b>	10.9%	37.1%	7.4%	<b>6.3%</b>
Sports/Recreation Footwear	9.3%	39.9%	7.5%	<b>3.2%</b>	11.8%	38.3%	7.2%	<b>8.0%</b>
Sports/Recreation Equipment	7.6%	31.6%	8.2%	<b>-1.3%</b>	9.0%	30.5%	7.4%	<b>3.4%</b>

\* Net is calculated by taking the % spending more less those spending less but re-based for just those spending

# PAY-TO-PLAY

## 2012 Pay-to-Play School Program

Pay-to-Play programs are increasing among middle/high school programs. These programs charge parents a flat rate fee for their child to participate in school sports. Of the 9% who responded having children playing a sport in middle/high school, over half contribute to a Pay-to-Play program. Most parents reported that these fees increased this year, while only 2% reported a decrease. Almost 70% pay more than \$100.00 extra fee for their child's school sports.



# ASPIRATIONAL INTEREST

US Participants, Ages 6+

## Which Sports Interest Non-Participants

Swimming for Fitness is the most popular “aspirational” sport amongst almost all age groups. Besides swimming, most interest lies in outdoor activities. Children ages 6 to 12 have an increased interest in camping, where young adults ages 18-24 are becoming more interested in running/jogging. Bicycling is also becoming more attractive to adults ages 25-54.

Ages 6-12	Ages 13-17	Ages 18-24	Ages 25-34
Swimming For Fitness	Working Out With Weights	Swimming For Fitness	Swimming For Fitness
Camping	Swimming For Fitness	Running/Jogging	Bicycling
Martial Arts	Bicycling	Trail Running	Trail Running
Bicycling	Working Out Using Machines	Bicycling	Running/Jogging
Running/Jogging	Camping	Hiking	Hiking
Soccer	Running/Jogging	Working Out With Weights	Working Out Using Machines
Fishing	Hiking	Camping	Camping
Hiking	Trail Running	Working Out Using Machines	Working Out With Weights
Basketball	Martial Arts	Backpacking	Fitness Classes
Canoeing	Shooting	Rafting	Basketball

Ages 35-44	Ages 45-54	Ages 55-64	Ages 65+
Swimming For Fitness	Bicycling	Swimming For Fitness	Swimming For Fitness
Bicycling	Swimming For Fitness	Bicycling	Working Out Using Machines
Hiking	Hiking	Working Out Using Machines	Bicycling
Working Out With Weights	Working Out With Weights	Hiking	Fishing
Camping	Camping	Working Out With Weights	Birdwatching/Wildlife Viewing
Running/Jogging	Working Out Using Machines	Camping	Hiking
Working Out Using Machines	Running/Jogging	Fitness Classes	Fitness Classes
Fitness Classes	Fishing	Fishing	Camping
Trail Running	Fitness Classes	Birdwatching/Wildlife Viewing	Working Out With Weights
Backpacking	Birdwatching/Wildlife Viewing	Running/Jogging	Shooting

*Ranked by top ten most popular interested sport and activity*

# ABOUT US



## **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 six 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)

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## **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.

### **Disclaimer**

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