



2018 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 2018 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 specific industry partner on the following page.

During 2017, a total of 30,999 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. 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 2017 participation survey sample size of 30,999 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 0.27 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 298,325,103 people ages six and older. “Inactivity” is defined to include those participants who reported no physical activity in 2017 and an additional 17 sports/fitness activities that require minimal to no physical exertion.

Data reported for “winter sports” are based on seasons: 2012 year is 2011/2012 season, 2013 year is 2012/2013 season, 2014 year is 2013/2014 season, 2015 year is 2014/2015 season, 2016 year is 2015/2016 season, and 2016/2017 season.

PHYSICAL ACTIVITY COUNCIL (PAC)

More about the PAC and further research

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.

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. The study looks at 123 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 2007, 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.

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 ACTIVITIES/SPORTS: Outdoor Foundation (OF) www.outdoorfoundation.org P: (202) 271-3252
- SNOW SPORTS: 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
- FOOTBALL: 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

OVERVIEW

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 specific industry partner.

When looking at how activity played out during 2017, it looks very similar to 2016. While 72% of the U.S. population ages six and over were active, the level of activity continues to trend towards a lesser frequency. Of the 216.0 million Americans who were active, well over half, 127.5 million, participated at the maximum three times a week. Around 62 million participated in low calorie burning activities (see Appendix 2).

The largest focus of activities continues to be toward fitness sports. Winter sports gained the most of all categories, increasing 2% over the last year.

Although the rate of inactivity has remained flat for the last 5 years, the number inactive rose due to population increase. 82.4 million people were inactive in 2017, that was 2.0 million more people when compared to 2012. While the Gen Z generation are moving towards a slightly more active lifestyle, those 65 and over are less active than they were in 2012.

The interest in activities has started moving toward outdoor recreation. The top aspirational activity for all age segments was outside, ranging from camping to biking to birdwatching. While camping appears to be in the top three in most segments, solo adventures are becoming a lost art and most people who aspired to camp will do so if they have someone to do it with. People want to experience the outdoors, fitness classes, teams sports, etc. with a partner.

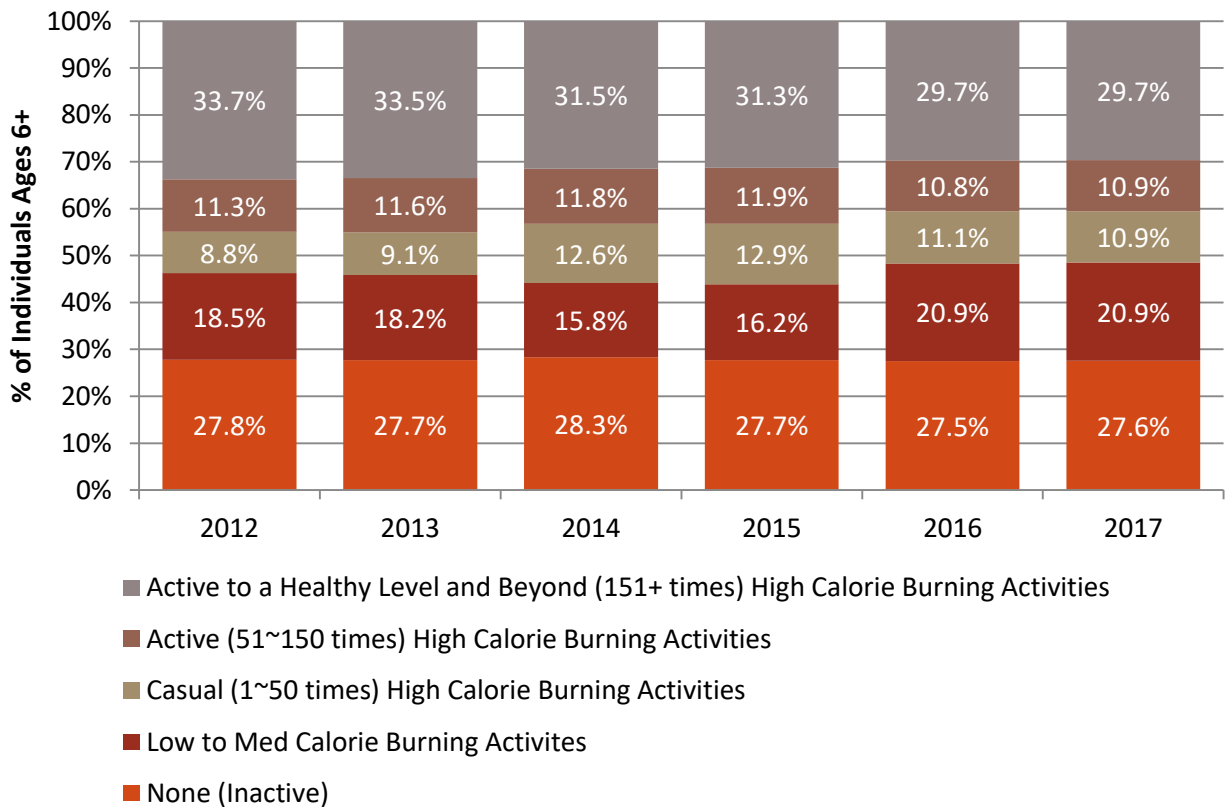
ACTIVITY LEVEL TRENDS

A breakdown of activity levels over time

Inactive to Healthy Active Across 5 years

US Population, Ages 6+

Activity and inactivity flatten out across the board, in 2017. Those who were fitness junkies remained fitness junkies, and those who rather take the path of less resistance, remained on that path. So what did change? There are to casual participants than core participants compared to 5 years ago. Looking at the low to medium and the casual categories, these participants grew 3.2%, on average, since 2012; while the more active participant dropped 2% on average.



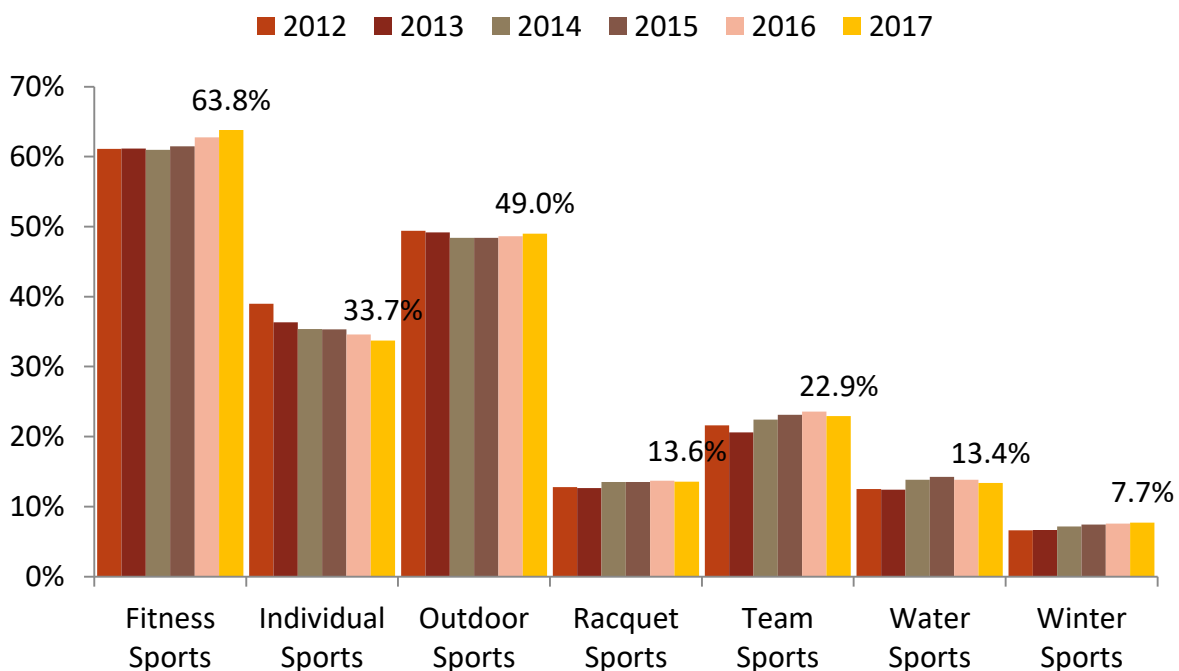
2012 - 2017 PARTICIPATION TRENDS

A look at physical activity participation by year

Total Participation Rate by Activity Category

US Population, Ages 6+

Fitness sports/activities continues to have the highest participation rates; having 64% of the US population ages 6 and over engaging in activities like running/jogging, high intensity/impact training, row machines, and swimming. Outdoor activities remained second but was flat from 2016; seeing a increase in day hiking and backpacking, but lost participants in canoeing and adventure racing.



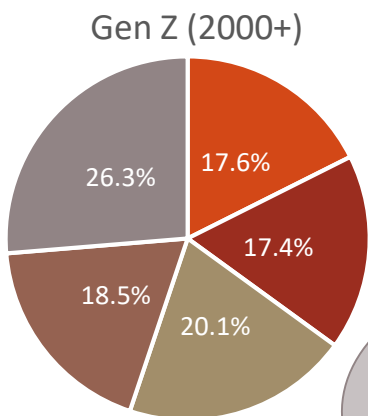
PARTICIPATION BY GENERATION

A look at activity levels by generation

Participation Rates Segmented by Generations

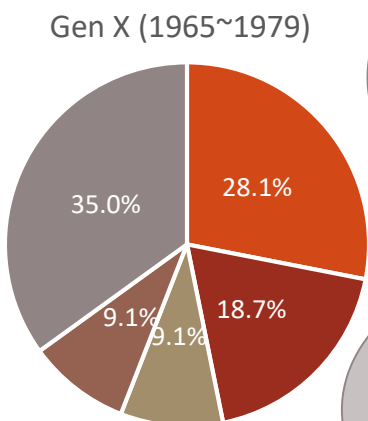
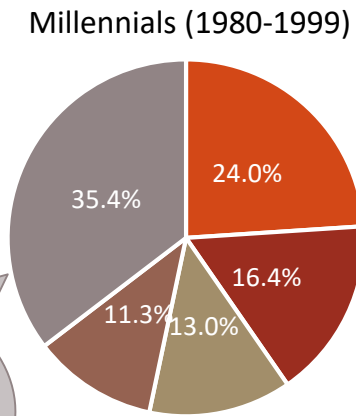
US Population, Ages 6+

Inactive	Low/Med Calorie	Casual & Low/Med Calorie	Active & High Calorie	Active to a Healthy Level
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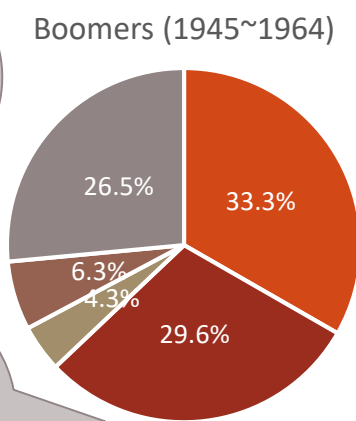
65% of GenZer's were at least casually active in 2017.

Almost half of Millennials participated in high caloric activities, while a quarter remained sedentary.



While 35% of both Gen X and Millennials were active to a healthy level, Gen X was less active overall.

As the Boomers continue to age, their commitment to an active lifestyle remains. Part rates in all categories remained flat from 2016.



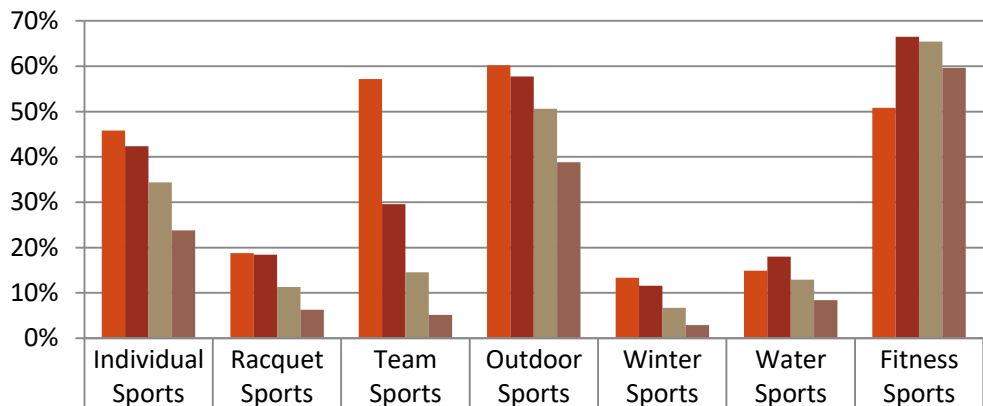
PARTICIPATION BY GENERATION

Types of participation by generation

Activity Category Segmented by Generations

US Population, Ages 6+

While age clearly affects how often someone participates, what they do can also be age dependent. Young kids, ages 6 to 17, who tend to be more active overall, focus on team sports and outdoor activities. While Boomers prefer fitness activities, especially low impact such as aquatic exercise, cycling, and walking. Millennials are more likely than the other generations to participate in water sports, such as stand up paddling, boardsailing, and surfing.



■ Gen Z (2000+)	45.8%	18.7%	57.1%	60.2%	13.3%	14.9%	50.8%
■ Millennials (1980-1999)	42.4%	18.5%	29.5%	57.8%	11.6%	18.0%	66.5%
■ Gen X (1965-1979)	34.4%	11.3%	14.5%	50.6%	6.7%	12.9%	65.4%
■ Boomers (1945-1964)	23.8%	6.3%	5.2%	38.9%	2.9%	8.4%	59.7%

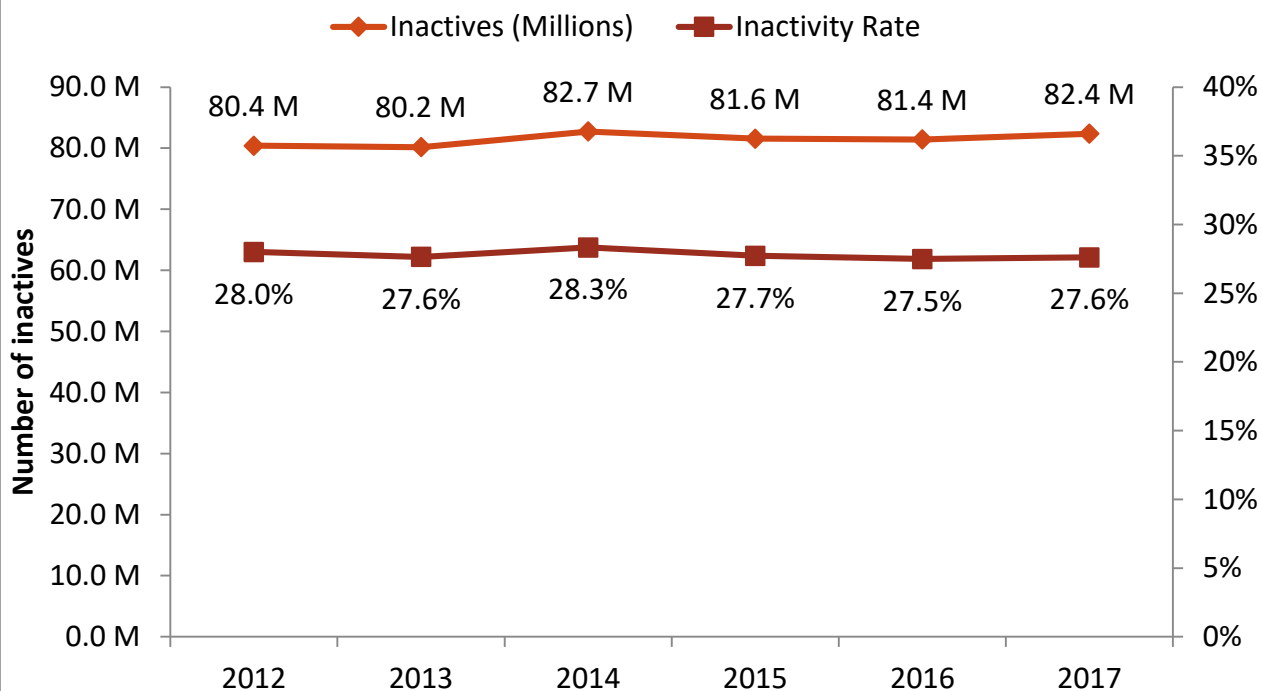
2012 – 2017 INACTIVITY TRENDS

Overall inactivity levels in the US

Inactivity Rates vs. Total Inactives

US Population, Ages 6+

Over the last few years, inactivity has been a hot topic. Initiatives on moving from a sedentary lifestyle to one that is active and healthy are in abundance. While the benefits of an active lifestyle are clear, inactivity has plateaued. Just over a quarter of the US population ages 6 and over, 82.4 million people, did not participate in even the lowest caloric burning activity in 2017. This rate still remains higher than the 10 year average of 27.2%.



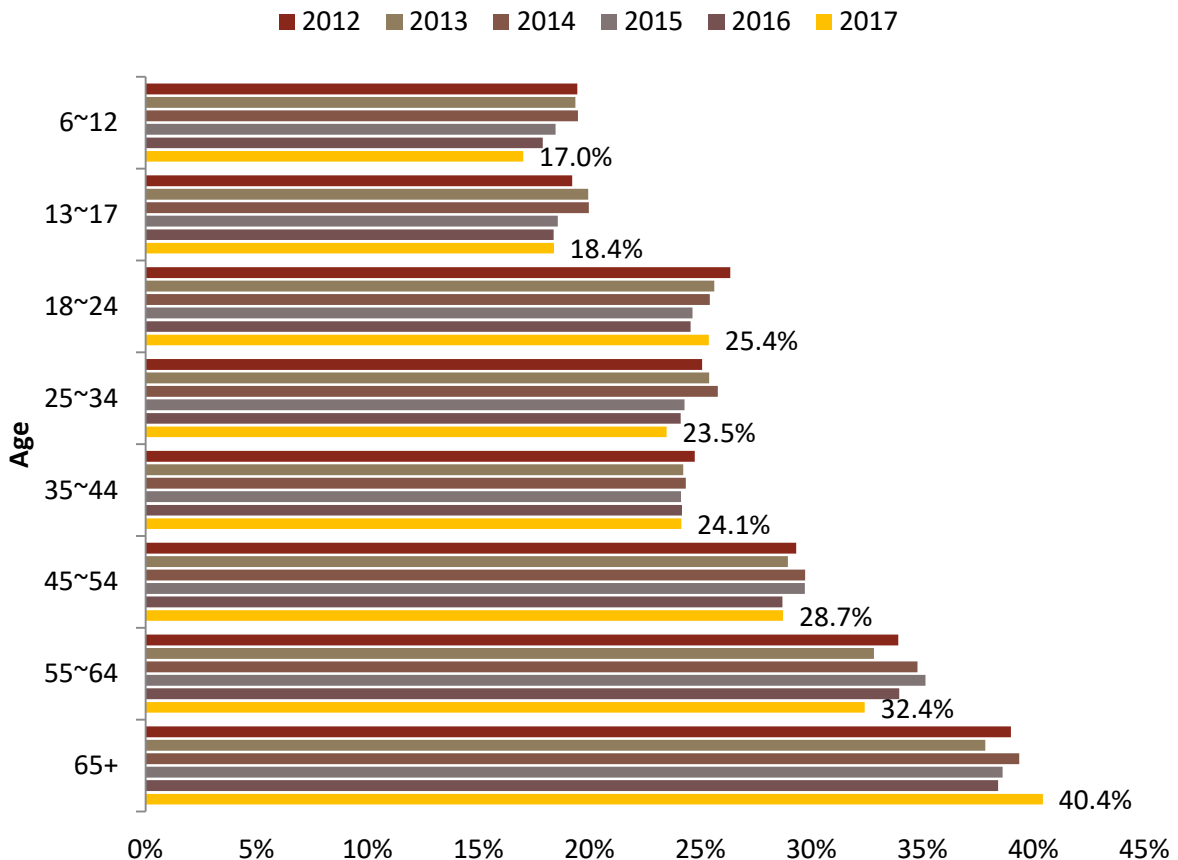
2012 – 2017 INACTIVITY BY AGE

Overall inactivity levels in the US

Inactivity Rates Segmented by Age

US Population, Ages 6+

In 2017, inactivity within age segments mainly decreased, with 6 to 12 and 55 to 64 age groups seeing the largest decline of 5%. The elderly, ages 65 and over, had the largest increase at 5%. However, looking at the trends over the past five years, all age segments have decreased, excluding aged 65 and over. Since 2012, six and 12 year olds have had the largest decrease, by far, of 2.4%, followed by 25 to 35 year olds at 1.6%. While there has been some significant changes in inactivity, overall rates still remain high



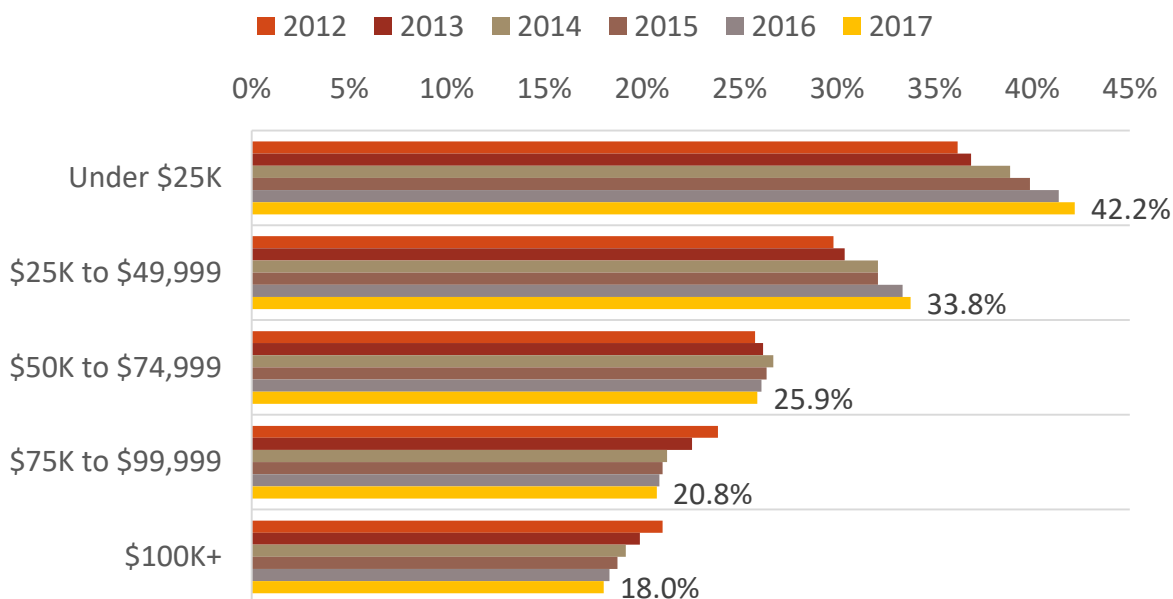
2012 – 2017 INACTIVITY BY INCOME

Overall inactivity levels in the US

Inactivity Rates Segmented by Income

US Population, Ages 6+

Trends continue to show how income affects inactivity. For the last five years, inactivity among household incomes under \$50K has increased and at a steady rate. On average, the inactivity rate in both these household segments has increased 3%. While those household segments making up income of \$75k or more has increased 3% on average. The affluent are getting more active while the less affluent are becoming more inactive.



NON-PARTICIPANT INTEREST

Which sports interest non-participants

Participation Interests Among Non-Participants

“Aspirational” Sports Participation, Ages 6+

Outdoor activities appear to be on everyone’s to do list for 2018. Camping, fishing, and biking have found the way to the top of each age segments. Although the level of interest varies, swimming for fitness is another constant interest across all groups.

Interest Level

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

Interest Level

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

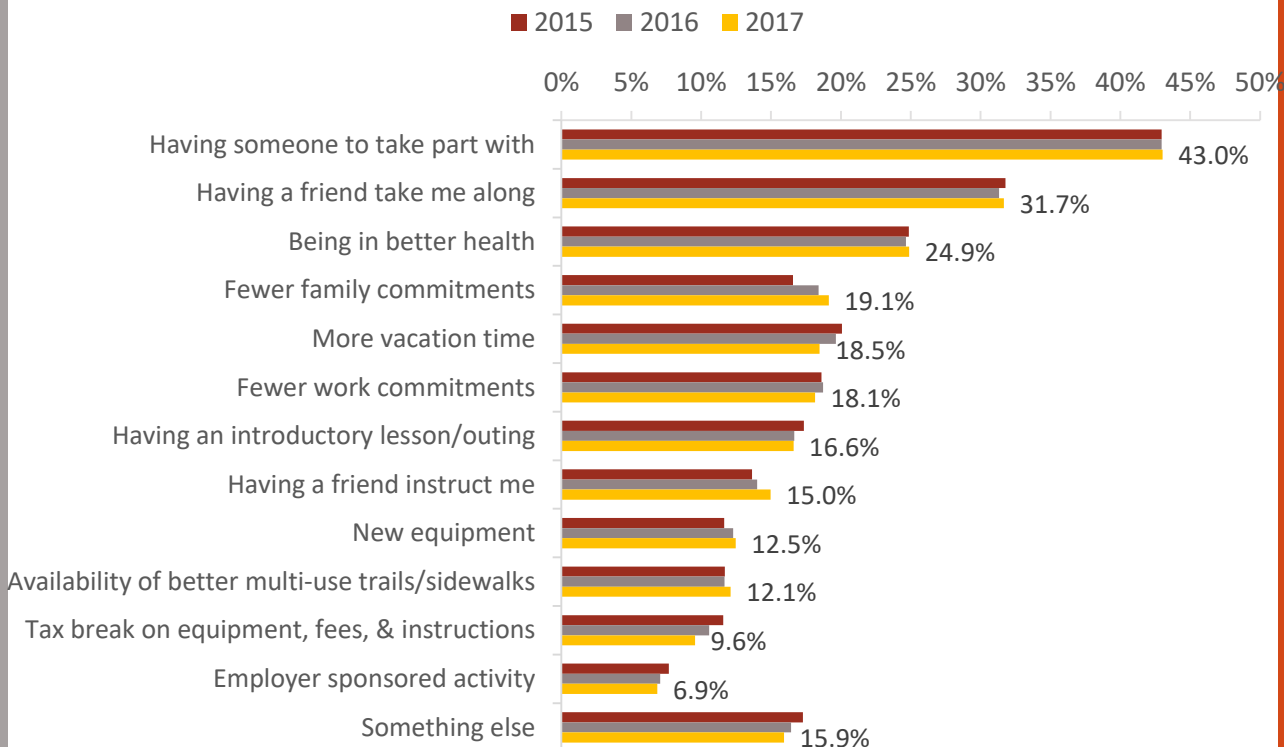
NON-PARTICIPANT INTEREST

What would help get non-participants involved

Ways To Get a Non-Participant Involved

“Aspirational” Sports Participation, Ages 6+

While people are aspiring to be active, getting them there always seems to be the problem. As seen over the years, people start participating in different activities if they had a friend or family member to do it with. Health issues and time commitments are classic excuses. Who wouldn't do more if they had an extra week of vacation? However, years has shown us that first time participation really depends on who you are doing it with more than if you have the time.



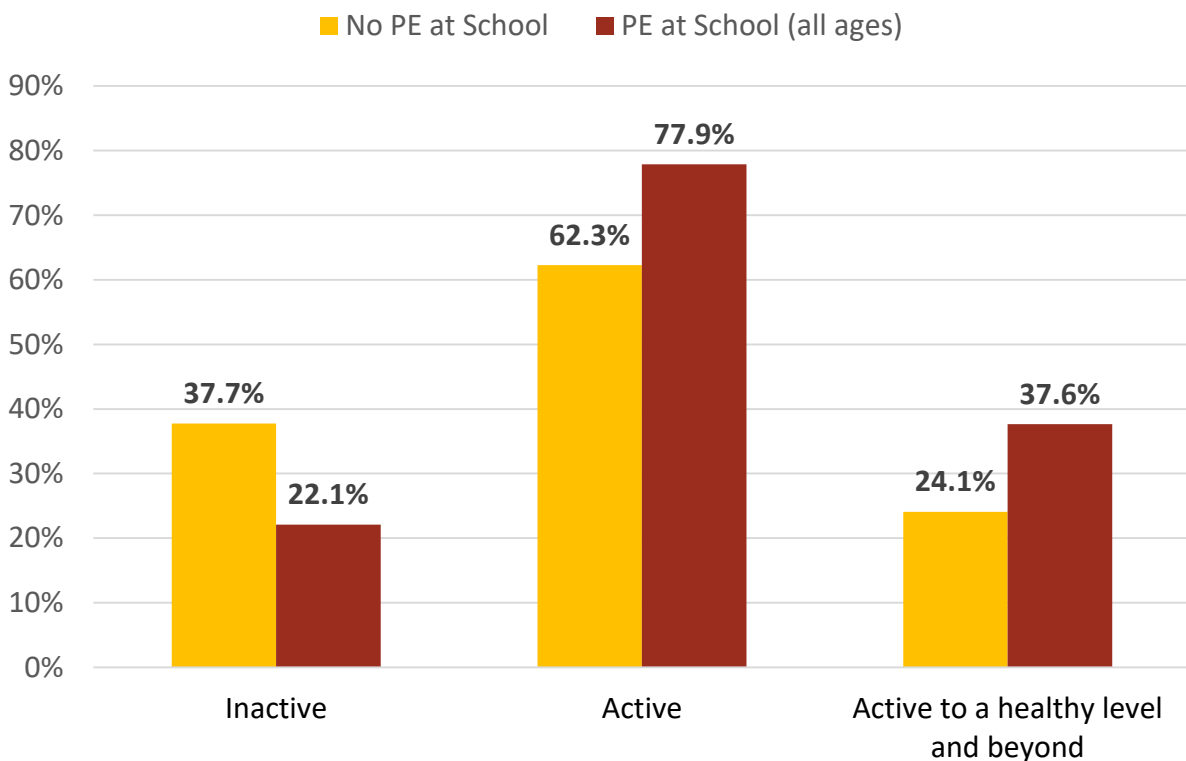
THE PE PATHWAY

How adults who had PE engage in physical activity

The Effect of PE on Physical Activities During Adult Years

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

Since PE is a predictor of activity in adulthood and lower income households depend on PE as their source of fitness, how is it that PE continues to disappear in the schools? Of those adults who had PE in school (between the ages of 6 to 17), almost 80% are active and 38% are active to a healthy level.



APPENDIX 1

List of Sports/Activities in Grouped Categories

FITNESS ACTIVITIES: High Impact/Intensity 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, Tai Chi, Yoga, 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/Boulder, Indoor, 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, 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), Marital Arts, MMA (Fitness, Competition), Wrestling, Other Combat Training, Roller Hockey, Stand-Up Paddling, Climbing (Sport/Boulder, Indoor, Traditional/Ice/Mountaineering), and Trail Running

Disclaimer

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