

TRENDS IN PARTICIPATION SPORTS DURING THE DECADE OF THE 70'S¹

Robert J. Halstenrud²

Abstract.--Five nationwide surveys to determine participation in popular sports have been conducted since 1970. These, plus subsequent ones in the 1980's, will be useful to advertising agencies, the sporting goods industry and government planners. Swimming, bicycling, camping, fishing, and bowling have consistently held the top five spots. Jogging and tennis have recently moved into the top ten spots. Demographic changes, economic conditions and the energy situation may affect results of future participation surveys.

During the past ten years, the A.C. Nielsen Company has conducted five nationwide surveys designed to determine the estimated number of persons who are participating in several of the more popular sports. The first study, conducted in 1970, was a modest beginning which included only thirteen sport activities. The 1970 data were collected from respondents using the face-to-face personal interview approach. Three years later, in 1973, the second survey was conducted and coverage was increased to twenty-five sport categories. When launching the 1973 study a telephone interview, carried out in the quality-controlled environment of a centralized WATS facility, became the data collection method. These same telephone interviewing procedures have been used consistently in all of the subsequent studies of sports participation and, primarily for this reason, the 1973 survey serves as the benchmark for trending the results as measured in subsequent studies conducted during the 70's.

In 1974, widespread interest in tennis prompted a special, in-depth study designed to provide additional insights for this fast-growing market.

The fourth national study in 1976 represented a return to the conventional type of sports participation research, using the 1973 procedures, in order to report trends in a proper and consistent manner. Coverage was increased to 27 recreational sports. The 1979 survey is the fifth major piece of research conducted in connection with our on-going sports research

program. This most recent study included 30 sport categories, of which 23 are common to all of the surveys carried out in 1973, 1976, and 1979. Using 1973 as the base or benchmark year, the three-year intervals between each of the major studies form the framework for trending the estimated number of participants in the various sports measured during the decade of the 70's.

As each study is conducted, a separate report is prepared for each sport category. Of course, the primary study objective is to provide a continuing and consistent research effort in the field of leisure-time participant sport activities. Having accomplished this purpose, one of the several major objectives is to develop projected estimates and trends of the total number of participants in the United States. Having identified the participants in each respective sport category, another of the objectives is to profile the players by several demographic characteristics such as age, sex, education, annual household income and geographic location. Frequency of participation is obtained to classify the participants into categories of "heavy", "medium" and "light" players. These levels of play are then profiled to determine whether and to what extent differences may exist that can be used as tools in marketing the sport to specific target groups.

The objective of using the survey data to predict the future number of participants in any given sport is another value inherent in the Nielsen studies. In our opinion, this predictive feature will become of greater significance as more studies are conducted during the upcoming decade of the 80's. These new measurement periods will add to our present bank of data to establish long-term trends which can be correlated with other known variables and tracking measures that are maintained over time in order to predict more accurately the future

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²Manager, Nielsen Developmental Syndicated Surveys, A.C. Nielsen Company, Nielsen Plaza, Northbrook, IL 60062.

number of participants.

The combination of all of these objectives determines those all-important marketing strategies that are needed for a particular sport to sustain itself as a growing and successful activity operating in a competitive environment with other participant-type sports as well as other types of leisure-time activities from which consumers have to choose. Finally, depending upon the nature of the sport, some of our other study objectives include information on equipment purchases, years of participation, ownership of equipment requiring a fairly substantial purchase investment, and the extent of accidents and/or injuries associated with participation in the sport.

In the 1979 survey, interviews were completed with 3,003 households within the Continental United States. Cooperating respondents (male or female head of the household) provided information about the sports participation habits of 9,019 persons living in those homes. The sample was designed using a modified random-digit-dial process to select the households that were interviewed. To implement this plan, a sample of listed telephone households is selected proportionate to total household population by county across the 48 contiguous United States. From this selection, the area code, prefix and first digit of the suffix were used to identify working banks of telephone numbers. Random numbers were generated by computer and substituted for the last three digits of each suffix to produce the final telephone sample. This randomization procedure insures that a high proportion of unlisted and newly listed telephones are represented.

To correct for any sample imbalances in projecting the sports participation levels to the total household and person populations of the contiguous 48 states, the projection factors were computed for each sample cell examined to bring the projections into proper alignment with the universe estimates. For households, projection factors were produced by county size within state. The projection factors for household persons were computed by four United States census regions and within each region by sex and age categories. Through this weighting and projection process, it was possible to bring the surveyed sample in line with the census estimates.

Now for a quick look at definitions. A "participant" or "player" is defined as any person who participates in an activity or plays a sport from time to time during the past twelve months. Within each sport category, there are also standard definitions that are used to identify players as being "heavy", "medium", and "light", depending upon their frequency of participation. A "participant or player house-

hold" is defined as having one or more members who engage in an activity or play a sport from time to time during the past twelve months.

While these qualifying definitions have been used consistently in all of our sports surveys, it is possible for users of Nielsen research to establish different participant criteria other than those described. For example, some organizations may determine that part or all of the "light" participant category as defined may not represent a viable target market for their products and/or services. Under such circumstances, it is possible to adjust the estimated number of participants and their respective profiles according to the revised definition.

Let's look at the trends in participation sports by their popularity rankings (Table 1). Swimming is the number one sport in the ranking of popularity. Bicycling has maintained the number two position in popularity in each of the survey measurement years. Camping was ranked fourth in 1973 and 1976. This activity has been growing in the number of participants during the decade of the 70's and has moved into the third most popular position in 1979, replacing the sport of fishing, which has been holding steady in terms of participants. Others in the top-ten ranking of popularity include bowling, boating (other than sailing), jogging/running (measured for the first time in 1979), tennis, pool/billiards, and softball. Overall, nine of the top ten sports have been included in all three studies; and six of the nine have shown player growth during the 70's, while three categories have held steady.

Roller skating, another newcomer in 1979, achieves a popularity ranking of twelve. Water skiing, shown in 1979 to be 16th in popularity, is actually in the 14th spot among the sports that have been included in all of the measurement years. Snow skiing is ranked 18th, but it is 16th among the sports common to all three studies. Without question, water skiing and snow skiing have continued to move up in popularity since 1973. Table tennis and ice skating are moving downward in popularity, while the others in this group are holding their respective positions when the categories measured for the first time in 1979 (jogging/running and roller skating) are removed from the comparisons.

Racquetball is ranked twenty-first in popularity and leads the list of sports included in the third group of ten. Actually, on a 1976 to 1979 common base of twenty-seven sports (that is, not including the new categories added in 1979), racquetball in 1979 would rank nineteenth in popularity compared to being in the twenty-fourth position in 1976. Soccer was added to the list of sports measured in 1979, and is ranked twenty-fifth among the thirty categories in the study.

Table 1.--1979 popularity of participation sports -- top-thirty rankings

Activity	1973	1976	1979
Swimming	1	1	1
Bicycling	2	2	2
Camping	4	4	3
Fishing	3	3	4
Bowling	5	5	5
Boating (Other than sailing)	8	7	6
Jogging/running ^a	-	-	7
Tennis	12	9	8
Pool/billiards	7	6	9
Softball	9	10	10
Table tennis	6	8	11
Roller skating ^a	-	-	12
Basketball	11	11	13
Hunting	13	13	14
Ice skating	10	12	15
Water skiing	17	17	16
Golf	14	14	17
Snow skiing	20	18	18
Baseball	15	15	19
Football	16	16	20
Racquetball ^b	-	24	21
Motorbiking/motorcycling	18	19	22
Sailing	21	21	23
Snowmobiling	19	20	24
Soccer ^a	-	-	25
Handball ^b	-	23	26
Archery	22	22	27
Paddle tennis ^b	-	26	28
Ice hockey	23	25	29
Platform tennis ^b	-	27	30

^aNot measured in 1973 and 1976.

^bNot measured in 1973.

Even more important than the trends in the ranking of popularity are the trends as expressed by the actual number of estimated participants. The thirty sports have been divided into two major categories--team sports and individual-type sports. Simply defined, a team sport is an activity normally associated with a group effort, which allows player substitutions. Individual-type sports are those activities generally considered to be a singular effort (or perhaps a double-player endeavor) with no substitution of participants.

In the next series of figures, each sport is represented by a series of three vertical bars. The bar on the left sets forth the estimated number of projected participants, in millions, as measured by our 1973 benchmark survey. The middle bar is the projected figure from the 1976 survey, and the third bar relates the 1979 projection.

Among the team sports included in the Nielsen surveys (Figure 1.), softball is the most popular, and currently boasts a total of about 28.5 million players. This estimate is up about 8 percent from the 26.4 million projected in 1973. Basketball participation (including both indoor and outdoor play) is now at a level of 24 million, which is about 9 percent higher than the 22.1 million figure reported in the 1973 base-year study. Baseball and football trends are quite similar with the number of participants holding fairly steady at levels of just over 15 million and 14 million, respectively. Soccer, measured for the first time in 1979, appears to be coming on strong in the United States; the current estimate of participants is about six and one-half million. Ice hockey participation has been in a downward slide since 1973, going from 3.3 million players in the base year down to 2.7 million in 1976, to about 1.7 million in 1979.

To summarize the team sport trends during the 1970's, softball has shown consistent increases in the number of players across each of the measurement years. The remaining team sports reveal some modest declines in participation from 1976 to 1979. This is believed to be a reflection of the decline in the ranks of teenagers that has taken place during the late 70's. Softball, on the other hand, continues to be played by both males and females beyond the high school and teenage years.

Figures 2a and 2b depict trends in individual-type sports that have shown growth in number of participants since 1973. It should be noted the sports are listed in order from left to right by popularity and not by their respective growth records. Bicycling, camping, bowling, and boating (other than sailing) have shown participant increases ranging from 6 percent to 16 percent since the base year study of 1973. Note the trend in the number of bicyclists; overall, an increase of about 6 percent is reported from 1973 to 1979. However, the projected number of bikers was down to about 70 million in 1979 from the 75 million as measured in 1976. If a new study was to be conducted in the spring of 1980, it is believed the number of bicyclists would be up to some degree over the 70 million reported in the spring of 1979, primarily because of the recent gas shortages and the dramatic increase in gasoline prices.

For the sport of tennis, there are four bars of projected survey information because of the special, in-depth study conducted in 1974. In the course of just one year -- from 1973 to 1974 -- the number of tennis players surged from 20.2 million to 33.9 million, then the projected figure retrenched somewhat to 29.2 million in 1976 and recovered well in 1979 to a level of 32.3 million participants. Overall, the 1979 projection represents a healthy increase of 60 percent for the tennis category when compared to the benchmark year of 1973.

FIGURE 1.-- Trends in Team Sports -- 1973 to 1976 to 1979 (Millions)

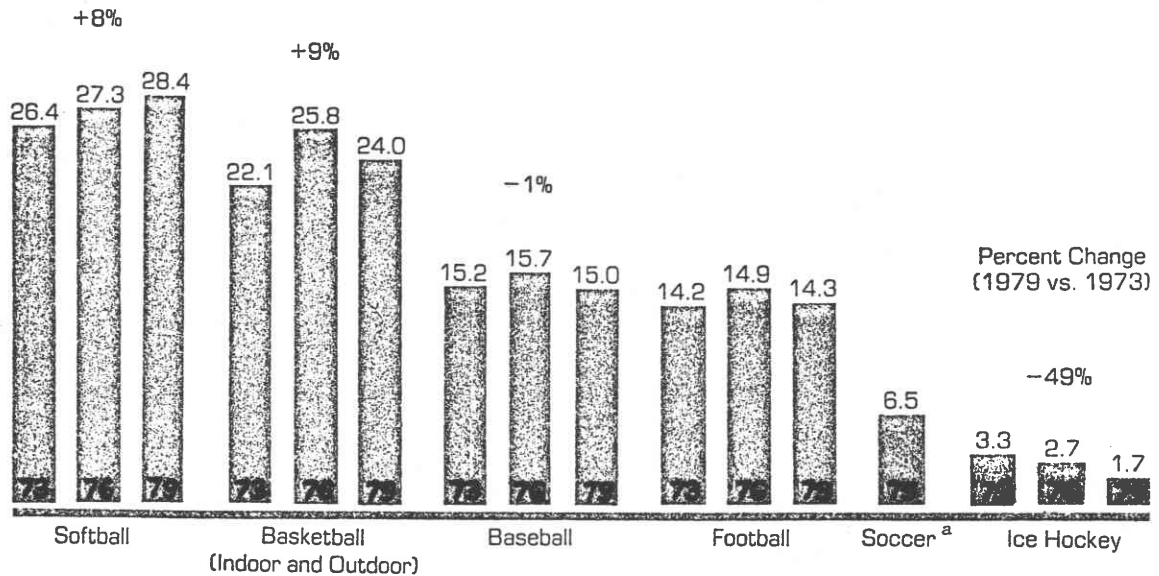


FIGURE 2A.-- Trends in Individual-Type Sports -- 1973 to 1976 to 1979 (Millions)

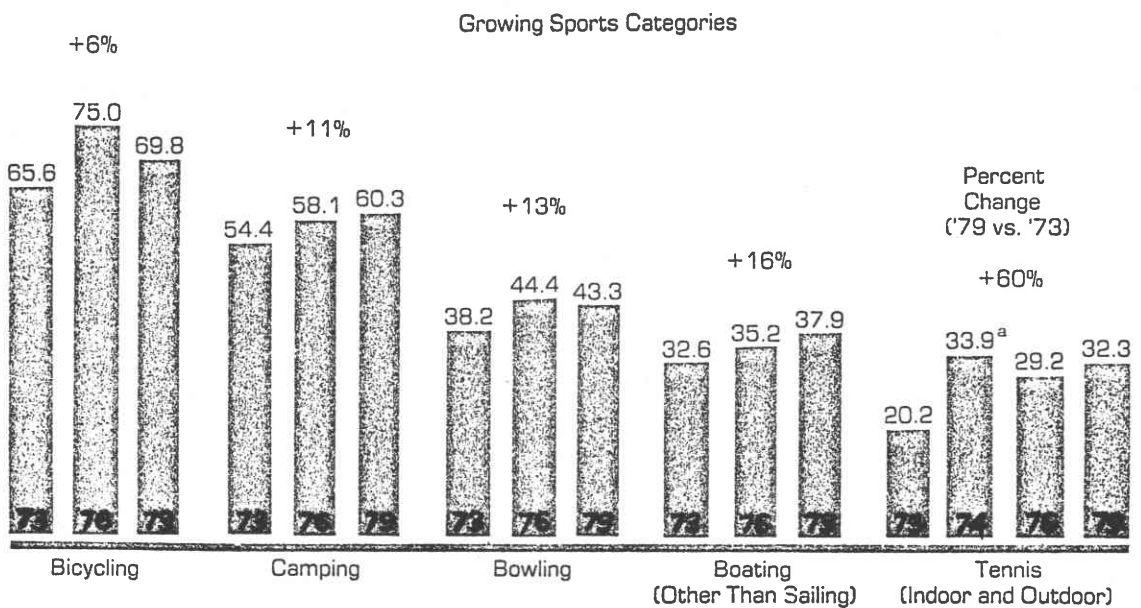
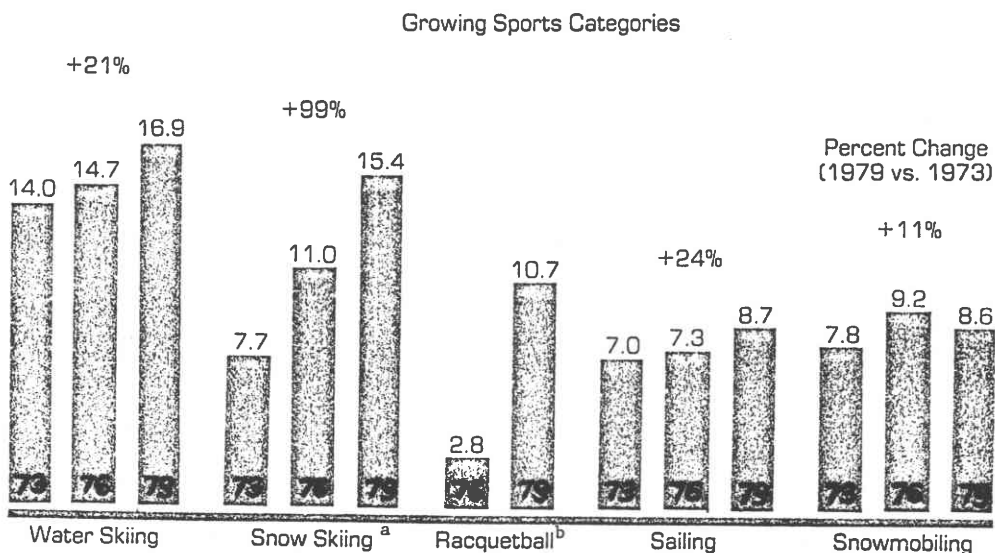


FIGURE 2B.-- Trends in Individual-Type Sports — 1973 to 1976 to 1979 (Millions)



^aIncludes downhill and cross-country.

^bNot measured in 1973.

Without question, racquetball is the fastest growing sport of the 70's, with participation skyrocketing to 10.7 million players in 1979 from about 2.8 million fans in 1976. Snow skiing, which includes both downhill and cross-country, is number two in growth since 1973, going from 7.7 million skiers in 1973 to about 11.0 million in 1976 to 15.4 million in 1979--a 99 percent increase over the six-year span of time from 1973 to 1979. Water skiing and sailing represent two other categories with very respectable growth records.

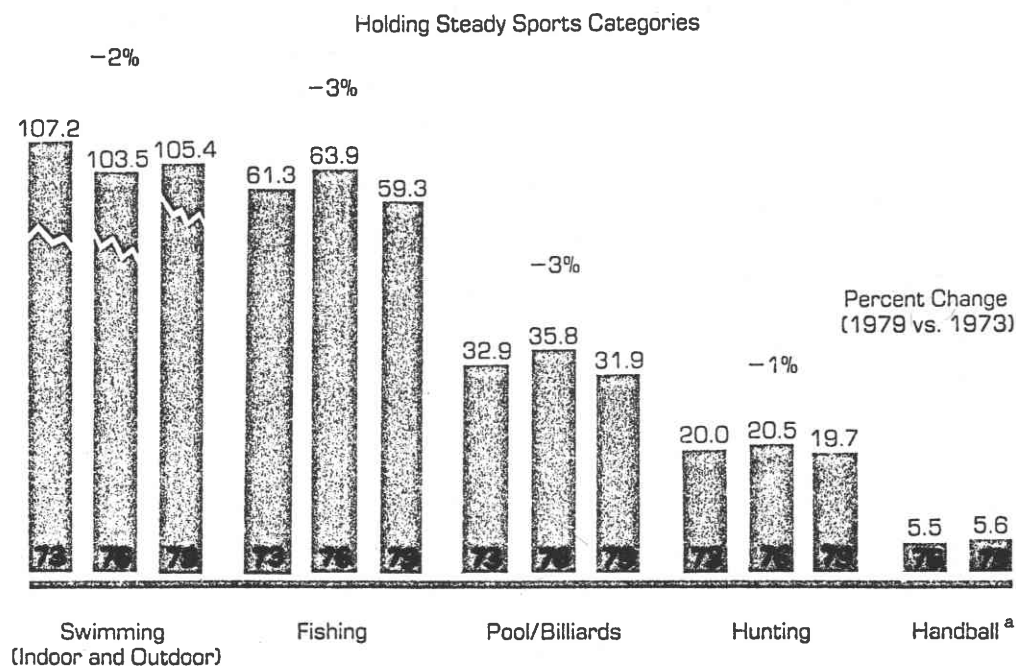
Those sport activities that classify as "holding steady" during the decade of the 70's include swimming (both indoor and outdoor), fishing, pool/billiards, hunting, and handball (Figure 3.). Swimming, which holds the number one ranking in popularity, is a leisure time activity that has maintained consistently over the three surveys a level of over 100 million participants. Handball, a close relative of racquetball, has about 5.6 million players and this estimate is holding steady with the projected number of 5.5 million in handball participants as reported in 1976.

Among the declining sports (Figure 4), there are two categories that are down dramatically in number of participants. Table tennis, which currently claims about 27 million players, is off about 20 percent from the 33.5 million persons who participated in 1973; and ice skating, while increasing somewhat in

number of participants from 1973 to 1976, has closed out the 70's with a substantial reduction to 18.9 million. The activities of golf, motorbiking/motorcycling, and archery are trending downward in the number of participants since 1973. Actually, the declines for these three categories are not all that dramatic; and since there is evidence of some stability, there are no doubt some observers who might choose to classify these activities as "holding steady" rather than positioning them in the category of declining sports for the decade of the 70's.

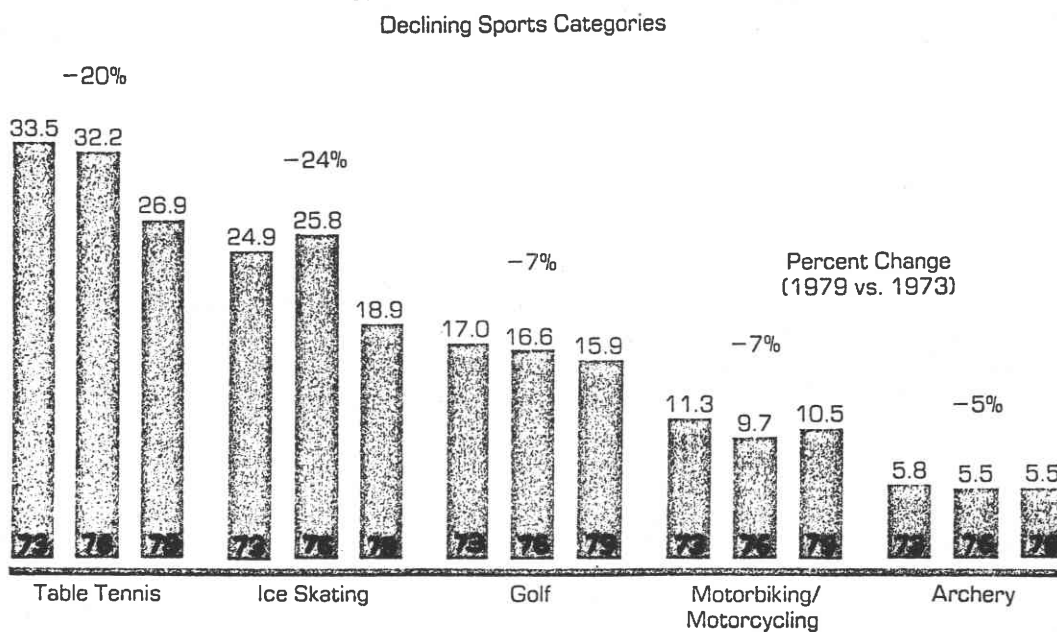
Our written reports on each activity contain the 1979 demographic profiles of the participants, as well as the demography measured in the studies conducted prior to the 1979 survey. This back data makes it possible to track the trends that have taken place in these demographic variables. Demographic shifts over time have enormous implications for business, in terms of developing marketing plans and designing marketing promotions and advertising targeted to specific audiences and/or population groups. Having an awareness of the demographic trends that are taking place over time, marketers can examine their significance and begin to make some judgments concerning their impact upon the future.

FIGURE 3.-- Trends in Individual-Type Sports — 1973 to 1976 to 1979 (Millions)



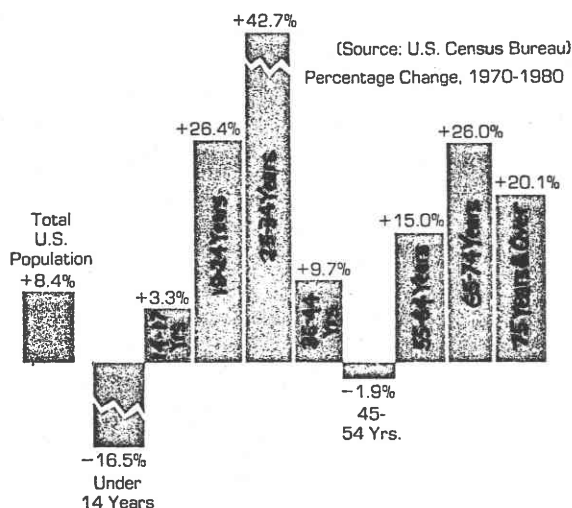
^a Not measured in 1973.

FIGURE 4.-- Trends in Individual-Type Sports — 1973 to 1976 to 1979 (Millions)



In moving from the end of one decade to the beginning of another, several articles have appeared in newspapers and magazines dealing with the demographic direction of the population in the United States. These decade-to-decade comparisons are helpful in developing a perspective for future planning. For example, the United States Census Bureau provides us with age changes in our population that took place from 1970 to 1980 (Figure 5). During the 70's, the overall population of the United States increased 8.4 percent. The biggest upward shifts in population from 1970 to 1980 took place among those persons in the age categories of 18 to 24 years and 25 to 34 years. Since these age classifications also account for a high proportion of racquetball players, it can be concluded the age shifts had a significant impact on the growth of racquetball during the decade.

FIGURE 5.--Population Shifts in the 1970's by Age



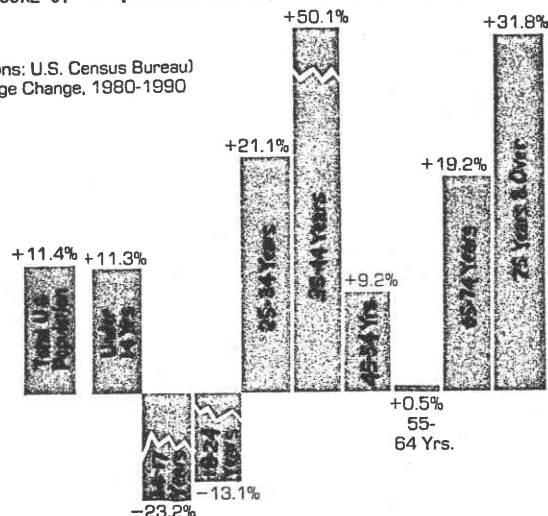
Census Bureau data also tells us of a rather sharp decline in the number of children under 14 years of age between 1970 and 1980 (Figure 5).

Looking ahead to the decade of the 80's, as projected by the Census Bureau, it is expected the total population in 1990 will increase by 11.4 percent (Figure 6). Certainly one of the most dynamic age demographic changes of the 80's will be in the decline of persons between the ages of 14 and 24. The upward bulge in population for the age categories of 18 to 24 years and 25 to 34 years during the past decade moves up primarily to the age category of 35 to 44 years over the next ten years. Of course, the 25 to 34 year old group is still expected to increase in numbers by about 21 percent during the 80's. So, when relating the age shifts for the 80's to the age profiles of, let's say, racquetball players as we know them today, it would appear these age changes may continue to have a favorable impact on racquetball player growth during the early 80's;

but this trend may begin to have a slowing influence at the close of the decade. Of course, at the same time, marketing of the sport of racquetball during the 80's may also change the trends in player profiles. If this player profile change was to be similar in nature to the age shifts that are expected to be upward, the net result would continue to have a favorable implication on the future of racquetball.

FIGURE 6.--Population Shifts in the 1980's by Age

(Projections: U.S. Census Bureau)
Percentage Change, 1980-1990



The next major Nielsen Sports Participation Survey is scheduled for 1982. It is difficult to predict what directions the trends in participant sports will take during the early 80's. We all know there are several variable factors that contribute in one way or another to the increase or decrease in popularity of different sports. Certainly the worsening energy situation in the United States is going to have some adverse effects on trends for some sports while other participant sport categories will benefit. Inflation and its effect upon discretionary income can also have both negative and positive implications on growth.

It is reported that more Americans will have more time available in the coming years for leisure activities. In the minds of these consumers, a participant sport has an image based upon such factors as costs, skills required to obtain a favorable level of player satisfaction and supply availability. These conditions create competition between the sports to garner participants and, thereby, offer a vast array of marketing challenges.

As recreation planners and researchers, you are keenly interested in the supply and demand comparisons. Without question, it can be summarized by the old adage that the only constant is change. Certainly growth cannot be expected to happen by itself. Becoming more perceptive and gaining more knowledge about the recreation industry will provide insights to help in managing this change with even greater efficiency in the 80's.