
4.0 RECREATIONAL TRENDS

4.1 Introduction

The 21st century poses new challenges for adapting and designing sports and recreation facilities that will respond to constantly evolving community needs. Several noteworthy trends will affect the features of facilities that will be in demand over the next two decades. These include:

- Impact of the Baby Boomers;
- Programs for working women;
- Accessibility for the disabled and aging; and
- Convenient, reduced time commitment exercise activities.

The American Academy for Parks and Recreation contends that people are exploring new recreation activities. More than one of five people has started a new recreation activity in the past year, and public facilities must explore new ways to design programs and facilities to meet these new needs, with flexible facilities being the key.

4.2 Canadian Participation Trends

In 2002, an Environmental Recreation Consultant (ERC) study cited a trend in Canada that 86% of Canadians are leaving structured activities for individual fitness activities like walking, jogging, cycling, and inline skating. Only 23% of Canadians use publicly provided recreation facilities for organized sports. Sport Canada found that team sports had significant reductions in participation.

Sport Canada, a branch of the International and Intergovernmental Affairs Sector within the federal Department of Canadian Heritage, released a report analyzing 1992 and 1998 sport supplements to the General Social Survey (GSS). This database does not limit “sports involvement” to active sports participation. Rather, it includes indirect involvement in sports, such as being a coach, referee/umpire, administrator or helper. Note that most of the participation rates calculated in the report use the total Canadian population aged 15 years and older as the denominator (TP = Total Population). The following information provides selected highlights and tables from the 1998 “Sports Participation in Canada” report.

Sports Participation

Fewer Canadians reported participating in a sport in 1998 than in 1992. Thirty-four percent of Canadians reported participating in a sport on a regular basis in 1998 (aged 15 and over) while 45% answered the same in 1992, which is an 11% decrease. Of the age groups, the 25 to 34 age group saw the largest decrease (over 14%) in participation between 1992 and 1998.

Table 4.1 Age Profile of Canadians Regularly Participating in Sport, 1992 and 1998

| | 1992 | | 1998 | | Net Change |
|------------------|-------|-------|-------|-------|------------|
| | 000s | % | 000s | % | |
| Total | 9,594 | 45.1% | 8,309 | 34.2% | -10.9% |
| Age Group | | | | | |
| 15-18 | 1,185 | 76.8% | 1,121 | 68.2% | -8.6% |
| 19-24 | 1,375 | 61.3% | 1,235 | 51.1% | -10.2% |
| 25-34 | 2,483 | 52.8% | 1,781 | 38.6% | -14.2% |
| 35-54 | 3,196 | 43.0% | 2,937 | 31.4% | -11.6% |
| 55 and Over | 1,355 | 25.3% | 1,234 | 19.8% | -5.5% |

Source: Sport Canada - Sport Participation in Canada - 1998

Male and Female Participation Rates By Age

While the proportion of both adult males and females playing sports declined, males playing sports (43%) outnumber females (26%). Looking at the age groups by sex, the younger age groups (15 to 18 and 19 to 24) have the least difference in participation rates by sex (25% and 24%, respectively). Also, the younger the individual, the more likely he/she is to participate in sports. It appears that people do not continue their active lifestyle past their 20's. The percentage of males 15 to 18 that participate in sports is over three times greater than males aged 55 and over, while the percent of both females 15 to 18 that participate in sports is 3.5 times greater than females aged 55 and over.

Table 4.2 Sports Participation Rates (%) by Age and Sex, 1998

| Sex | 15-18 | 19-24 | 25-34 | 35-54 | 55 and Over |
|------------|-------|-------|-------|-------|-------------|
| Males | 80.0% | 63.0% | 48.3% | 39.5% | 25.1% |
| Females | 55.2% | 39.3% | 28.8% | 23.2% | 15.3% |
| Difference | 24.8% | 23.7% | 19.5% | 16.3% | 9.8% |

Source: Sport Canada - Sport Participation in Canada - 1998

Provincial/Regional Variations

In 1998, residents of the Atlantic Provinces and Ontario reported the lowest levels of sports participation, while Quebec, Alberta, and British Columbia reported the highest levels.

Table 4.3 Sports Participation, Canada and the Provinces, 1992 and 1998 ^{1/}

| | 1992 | | 1998 | | Net Change |
|----------------------|------------|--------------|------------|--------------|---------------|
| | 000s | % | 000s | % | |
| Canada | 9,594 | 45.1% | 8,309 | 34.3% | -10.8% |
| Newfoundland | 160 | 36.4% | 119 | 26.6% | -9.8% |
| Prince Edward Island | 40 | 40.3% | 27 | 25.2% | -15.1% |
| Nova Scotia | 333 | 46.8% | 248 | 32.6% | -14.2% |
| New Brunswick | 251 | 44.1% | 194 | 31.6% | -12.5% |
| Quebec | 2,655 | 48.7% | 2,288 | 38.1% | -10.6% |
| Ontario | 3,234 | 40.9% | 2,921 | 31.8% | -9.1% |
| Manitoba | 349 | 41.5% | 265 | 29.7% | -11.8% |
| Saskatchewan | 335 | 45.3% | 267 | 33.9% | -11.4% |
| Alberta | 869 | 44.9% | 833 | 36.8% | -8.1% |
| British Columbia | 1,368 | 52.7% | 1,147 | 35.8% | -16.9% |

Source: Sport Canada - Sport Participation in Canada - 1998

Though all provinces experienced a decrease in sports participation, British Columbia and Prince Edward Island experienced the largest decreases. Alberta, Ontario, and Newfoundland all experienced single-digit percent decreases in participation between 1992 and 1998. Manitoba had 349,000 sports participants in 1992 and 265,000 participants in 1998, a decrease of 84,000 people, or approximately 12%.

Education

In 1998, almost one-half (46%) of people holding a university degree regularly participated in sports. In comparison, less than one-third (29%) of persons with some secondary schooling or less participated regularly. The level of sports participation decreased across all education levels between 1992 and 1998 by about 10% on average. The level of participation of those with secondary education or less decreased at a smaller rate (-7.7%) than the level of participation of those with a university degree (-11.7%).

Table 4.4 Sports Participation (%) by Level of Education

| Education Level | Some Secondary or Less | Some College / Trade / High School Diploma | Diploma / Some University | University Degree |
|-----------------|------------------------|--|---------------------------|-------------------|
| 1998 | 28.5% | 33.8% | 40.7% | 46.4% |
| 1992 | 36.2% | 44.5% | 51.5% | 58.1% |
| Difference | -7.7% | -10.7% | -10.8% | -11.7% |

Source: Sport Canada - Sport Participation in Canada - 1998

Income

Generally, the higher the income, the higher the sports participation rate. In 1998, half of respondent households earning incomes of \$80,000 or more participated in sport compared to one-quarter of respondent households earning less than \$20,000. The level of participation of those with a household income below \$20,000 decreased at a significantly lower rate (-5.3%) than those in other income categories.

Table 4.5 Sports Participation (%) by Household Income

| Income Level | < \$20K | \$20K - \$30K | \$30K - \$50K | \$50K - \$80K | > \$80K |
|---------------------|-------------------|----------------------|----------------------|----------------------|-------------------|
| 1998 | 25.2% | 26.2% | 34.4% | 41.5% | 50.6% |
| 1992 | 30.5% | 39.2% | 48.2% | 54.8% | 63.2% |
| Difference | -5.3% | -13.0% | -13.8% | -13.3% | -12.6% |

Source: Sport Canada - Sport Participation in Canada - 1998

Most Popular Sports

Golf, hockey, baseball and swimming were most frequently reported for adult participation in 1998. Notably, the survey indicates that golf has replaced hockey as the number one sport activity reported. Over 1.8 million Canadians reported playing golf on a regular basis in 1998 (7.4% of the population) compared to 1.3 million (5.9%) in 1992. 1.5 million Canadians play hockey (6.2% of the population), which is similar to the number of Canadians that played hockey in 1992 (1.4 million, or 6.4% of the population). Swimming, golf, baseball, and volleyball (in descending order) were the sports of choice for women 15 years and older, while men preferred hockey, golf, baseball and basketball. Of the top four most played sports in 1998, three-quarters of golfers were male, 95% of hockey players were male, 70% of baseball players were male, and 60% of swimmers were female.

Table 4.6 Most Played Sports ^{1/} by Canadians (Aged 15 and older), 1998

| Population | Total -000's | Male -000's | Female - 000,s | Percent of Participants Male | Overall Participation Rate ^{2/} 24,260 | Active Participation Rate ^{3/} 8,309 | Active Male Rate 5,140 | Active Female Rate 3,169 |
|---------------------------|-----------------|----------------|-------------------|------------------------------------|---|---|-------------------------------------|--|
| Golf | 1,802 | 1,325 | 476 | 73.5% | 7.4% | 21.7% | 25.8% | 15.0% |
| Hockey (Ice) | 1,499 | 1,435 | 65 | 95.7% | 6.2% | 18.0% | 27.9% | 2.1% |
| Baseball | 1,339 | 953 | 386 | 71.2% | 5.5% | 16.1% | 18.5% | 12.2% |
| Swimming | 1,120 | 432 | 688 | 38.6% | 4.6% | 13.5% | 8.4% | 21.7% |
| Basketball | 787 | 550 | 237 | 69.9% | 3.2% | 9.5% | 10.7% | 7.5% |
| Volleyball | 744 | 394 | 350 | 53.0% | 3.1% | 9.0% | 7.7% | 11.0% |
| Soccer | 739 | 550 | 189 | 74.4% | 3.0% | 8.9% | 10.7% | 6.0% |
| Tennis | 658 | 434 | 224 | 66.0% | 2.7% | 7.9% | 8.4% | 7.1% |
| Skiing (Downhill) | 657 | 342 | 315 | 52.1% | 2.7% | 7.9% | 6.7% | 9.9% |
| Cycling | 608 | 358 | 250 | 58.9% | 2.5% | 7.3% | 7.0% | 7.9% |
| Skiing (Cross-Country) | 512 | 208 | 304 | 40.6% | 2.1% | 6.2% | 4.0% | 9.6% |
| Weightlifting | 435 | 294 | 140 | 67.6% | 1.8% | 5.2% | 5.7% | 4.4% |
| Badminton | 403 | 199 | 204 | 49.4% | 1.7% | 4.9% | 3.9% | 6.4% |
| Football | 387 | 347 | 40 | 89.7% | 1.6% | 4.7% | 6.8% | 1.3% |
| Curling | 312 | 179 | 133 | 57.4% | 1.3% | 3.8% | 3.5% | 4.2% |
| Bowling (10 Pin) | 282 | 132 | 150 | 46.8% | 1.2% | 3.4% | 2.6% | 4.7% |
| Bowling (5 Pin) | 200 | 79 | 122 | 39.5% | 0.8% | 2.4% | 1.5% | 3.8% |
| Softball | 210 | 118 | 92 | 56.2% | 0.9% | 2.5% | 2.3% | 2.9% |
| Squash | 163 | x | x | x | 0.7% | 2.0% | x | x |
| Karate | 129 | 81 | 48 | 62.8% | 0.5% | 1.6% | 1.6% | 1.5% |
| Figure Skating | 121 | 46 | 75 | 38.0% | 0.5% | 1.5% | 0.9% | 2.4% |
| Rugby | 104 | x | x | x | 0.4% | 1.3% | x | x |
| Ball Hockey | 91 | x | x | x | 0.4% | 1.1% | x | x |
| Snowboarding | 81 | x | x | x | 0.3% | 1.0% | x | x |
| Waterskiing | 79 | x | x | x | 0.3% | 1.0% | x | x |
| In-Line Skating | 70 | x | x | x | 0.3% | 0.8% | x | x |
| Racquetball | 58 | x | x | x | 0.2% | 0.7% | x | x |
| Other | 323 | 219 | 104 | 67.8% | 1.3% | 3.9% | 4.3% | 3.3% |

Source: Sport Canada – Sport Participation in Canada - 1998

^{1/} Respondents may report participating in more than one sport

^{2/} The percentage is calculated using the total Canadian population aged 15 and over.

^{3/} The percentage is calculated over the population participating in at least one sport - the "active population"

Outdoor Sports and Park Recreation Trends

People have new needs and wants for their time outdoors. Parks and city facilities need to adapt to capture these new markets. Many facilities must consider the “If you can afford to pay, you can play” private sector philosophy in order to break even. Generally public recreation facilities and park districts are cutting down on basics to provide specialized and upscale services. For example, parks are incorporating museum elements like historic villages to attract more visitors. Increasingly, people want natural areas incorporated into the city and many park districts are exploring linear parks that would follow old railroad lines and streams. Cities like Denver, Colorado have conducted surveys and are redesigning the programs they provide to achieve a better mix of park and recreation facility activities. The Denver public cited neighbourhood parks and trails for hiking, biking, and jogging as the most desirable outdoor facilities.

Forms of human-powered outdoor recreation have become more popular according to studies in the United States. The Outdoor Industry Association's Outdoor Recreation Participation Study 2002 found that in 1998, 60% of the U.S. population participated at least once in a human powered outdoor recreation activity. By 2001 this percentage had increased to 67%. A look at northern central states that have a colder weather patterns indicates higher than national average participation in outdoor recreation activities at 68%. While there has not been a similar outdoor recreation study in Canada, many of the trends indicated by the report will apply to the recreation needs of Canadians. The following list highlights favoured activities:

1. Hiking
2. Bicycling- Road
3. Car Camping
4. Bicycling- Single Track
5. Bicycling- Wide Dirt
6. Trail Running
7. Canoeing
8. Bird Watching
9. Cross Country Skiing
10. Camping

Alternative Sports

Extreme sports are capturing larger parts of the population with exponential growth in interest over the 1990s. The Sporting Goods Manufacturer's Association found that in 2002, 1/3 of inline skaters are frequent participators. Inline skating has grown 453% in the U.S. since 1990. The average artificial wall climber has been in the sport for two years. Rock climbing has a low percentage of the population participating, which makes trend prediction difficult. However, the 2002 Outdoor Industry Association study projects that 2.4% of Americans over 16 have climbed an artificial rock wall, 2.3% have climbed a natural rock, and 0.9% have participated in ice climbing each year.

Pool Facilities

As families get busier, pools need to be located near other activities that will allow families to enjoy multiple activities in one convenient location. This has particular implications for pools, which increasingly need to provide space for numerous potential activities, including:

- Leisure Swimming
- Swim lessons for all ages
- Water Aerobics
- Lap Swimming

- Synchronized Swimming
- Diving (resurgence in popularity)
- Scuba classes
- Rehabilitation Therapy
- Non-swimming fitness classes

All members of the family want to be able to enjoy the pool. According to the U.S. National Park and Recreation Service, there are several ways to customize elements of the facility to meet these new multigenerational needs:

- Provide shaded areas with plenty of furniture for sun conscious relation.
- Make family changing areas.
- Develop zero depth entry pools to make swimming easier for seniors and small children but limit this area to a few feet because people congregate in deeper water (1 ½ to 5 feet deep).

Sports Facilities

The following charts highlight the exercise trends that private sport and exercise facilities have invested in or plan to expand. As these facilities respond quickly to market forces, they may give insight on new trends that are not provided by public facilities. It is notable that 70% of clubs offer some form of childcare to meet the needs of busy parents and working families. Childcare facilities also help facilities meet the multigenerational needs of potential visitors.

Table 4.7 Top 10 Most Common Club Programs

| Activity | Percentage of Clubs |
|-----------------------|----------------------------|
| Personal Training | 94% |
| Step/Bench Aerobics | 90% |
| Fitness Evaluation | 89% |
| Cardio Kickboxing | 86% |
| Yoga | 86% |
| Strength Training | 85% |
| Lo Impact Aerobics | 83% |
| Hi Impact Aerobics | 77% |
| Group Cycling Classes | 72% |
| Child Care | 70% |

Source: International Health, Racquet, and Sports Club Association- Industry Statistics

People are increasingly interested in how to be fit and enhance their current level of fitness. The prevalence of personal training programs and fitness evaluation programs indicates a high consumer demand for these services.

Table 4.8 Top 10 Facilities Available at Clubs

| Activity | Percentage of Clubs |
|---------------------------------|----------------------------|
| Free Weights | 97% |
| Treadmills | 95% |
| Stationary Bikes (upright) | 94% |
| Stationary Bikes (recumbent) | 93% |
| Climbers/Steppers | 93% |
| Elliptical Motion Trainers | 92% |
| Plate- Loaded Equipment | 87% |
| Selectorized Equipment | 81% |
| Group Exercise/ Aerobics Studio | 78% |
| Rowers | 77% |

Source: International Health, Racquet, and Sports Club Assoc. Industry

The private exercise club industry provides a glimpse at demand for facilities and services. Notably the largest areas within clubs are devoted to individual exercises like free weights, cardiovascular exercise machines, and weight machines. The programs and facilities at private clubs are designed to be convenient for individual exercise. People want the benefits of being fit with plenty of scheduling flexibility. Team sports do not provide the flexibility that many busy working adults need. Sources at the City of Denver found that the most desirable indoor public facilities include a senior citizens area, weight and cardiovascular equipment rooms, aerobic and fitness space, tot play area, gyms for basketball, volleyball, etc. and teen areas. This indicates that consumers would like public facilities to mirror more closely some of the areas available in private facilities.

Table 4.9 Areas of Private Club Expansion

| Area | 2001 Expansion | Planned Expansion 2002/3 |
|-------------------------------------|-----------------------|---------------------------------|
| Cardiovascular Equipment Area | 26% | 30% |
| Free Weight Area | 16% | 19% |
| Child Care Area | 15% | 11% |
| Aerobics/ Dance Exercise Area | 14% | 17% |
| Locker Rooms | 14% | 21% |
| Resistance Equipment Area | 14% | 18% |
| Food & Beverage | 12% | 11% |
| Physical Therapy/Rehab/Chiropractic | 9% | 10% |
| Pro Shop | 9% | 9% |
| Lounges | 7% | 7% |
| Meeting Rooms | 7% | 7% |
| Children's Rec. Area | 6% | 7% |
| Gymnasium | 3% | 4% |
| Indoor Pool | 2% | 4% |
| Indoor Tennis | 2% | 2% |
| Outdoor Pool | 2% | 3% |
| Racquetball Courts | 2% | 2% |
| Squash Courts | 2% | 1% |
| Athletic Fields | 1% | 2% |
| Climbing Walls | 1% | 2% |
| Indoor Track | 1% | 1% |
| Outdoor Tennis Courts | 1% | 2% |
| Outdoor Basketball | 0% | 2% |
| Outdoor Track | 0% | 2% |

Source International Health, Racquet, and Sports Club Association- Industry Statistics

Private clubs have been expanding areas that bring in the most consumers. The trend indicated in the chart above is an expansion of individual exercise areas. Few clubs are expanding group sport areas like gymnasiums, racquetball courts, and tennis courts. Meanwhile, almost a third of all private clubs will be expanding the cardiovascular equipment area and another tenth will expand child-care facilities.

Age Appropriate Facilities

Programs in the future will respond to the changing needs of consumers, with emphasis on four main groups that most need district services:

- Seniors
- Youth
- Families
- Baby Boomers

In the future, busy families will look for multigenerational recreation facilities. Facilities that target several age groups will also have visitors throughout the day, rather than only during after work hours, which is a current issue in Winnipeg. The following highlights specific trends regarding these segments.

Families

According to Physicians and Sports Medicine working age adults may want additional outdoor activities, because they spend so much time indoors for work. Other adults will search out stress relieving and spiritual forms of exercise like Yoga and Pilates. The challenge for all families is balancing multiple priorities. For this reason, inter-generational recreation facilities tend to be favoured.

Senior Markets

As the citizens of Winnipeg age, more water exercise programs will be required for seniors and those with decreased mobility. The decrease in sports participation by older Canadians may be from a lack of appropriate exercise opportunities. The American Academy for Park and Recreation Administration suggest that parks need to reassess fee structures for seniors, as they become a more active element at park district facilities. Perhaps need-based fees would be more appropriate than the older age based criteria. The Sporting Goods Manufacturer's Association suggests that older consumers are spending more money on equipment, while young consumers want less expensive outdoor activities. Thus facilities that require large equipment investments like golf should be geared towards the tastes of older consumers.

Boomers

As the Baby Boomers retire, recreation facilities must adapt to the new active lifestyles of seniors. These retirees want activities that are active and do not sound old or tired. The National Recreation and Park Association suggests that Boomers want an upscale or clubby atmosphere in their recreation facilities. These consumers maintain a busy schedule and prefer short individual exercise activities, with greater emphasis on leisure programs with shorter durations (about 8 weeks). Many activities should be planned for nights and weekends as many Boomers continue to work. Programs like bingo, bridge, and social dances will not be as popular with the Baby Boomers as they were with previous generations.

Children / Youth

Over half (54%) of Canadian children aged 5 to 14 were actively involved in sports. Girls (48%) tend to be less active than boys (61%). About one-half (49%) of children in households earning under \$40,000 were active in sports, compared to 73% in households earning over \$80,000. While a large number of children are active in sports, there are concerns and perceptions that many children are overweight and do not receive adequate exercise. Currently, a quarter of private facilities have started children's fitness programs and this number is expected to grow as concerns about child obesity increase.

Table 4.10 Sports Participation by Children, 1998

| | Active Kid | Active Boy | Active Girl |
|-------------------|-------------------|-------------------|--------------------|
| Soccer | 31.4% | 34.4% | 27.7% |
| Swimming | 23.6% | 18.8% | 29.9% |
| Hockey (Ice) | 23.6% | 37.4% | 5.7% |
| Baseball | 21.9% | 25.7% | 16.9% |
| Basketball | 13.1% | 12.4% | 14.1% |
| Skiing (Downhill) | 7.2% | 6.3% | 8.3% |
| Figure Skating | 5.8% | x | x |
| Karate | 5.5% | 6.5% | 4.1% |
| Volleyball | 5.2% | 3.1% | 8.1% |

Source: Sport Canada - Sport Participation in Canada - 1998

The American Academy for Park and Recreation Administration suggests that more recreation programs for children need to focus on current social problems. Specially targeted programs can positively affect teens by giving them healthy outlets for their energy and frustrations. Parks and recreation facilities in Canada and the USA have responded with teen areas that can include skate boarding parks and rock climbing facilities. In addition, new public programs have been implemented that teach teens canoeing and backpacking skills. Now, park districts in the U.S. incorporate art and camp activities to give children positive influences. These types of programs and facilities attract teens that are uninterested in team sports and promote positive self-esteem.

Club / Community Leagues

In 1992, only 34% of active Canadians belonged to sports clubs. Over half (55%) of “active Canadians” (Canadians 15 years and over that reported participating in a sport on a regular basis over a 12-month period) belonged to a local club, community league or other local amateur sport organization in 1998. This amounts to 20% more active participants in a club than in 1992.

Table 4.11 % Active Population Belonging to Sport Club by Age, 1992 and 1998

| Age | 15-18 | 19-24 | 25-34 | 35-54 | 55 and Over |
|------------|--------------|--------------|--------------|--------------|--------------------|
| 1998 | 44.1% | 29.2% | 54.1% | 68.5% | 52.4% |
| 1992 | 32.7% | 33.6% | 31.0% | 38.8% | 31.0% |

Source: Sport Canada - Sport Participation in Canada - 1998

In 1998, almost 20% of all Canadians (aged 15 and older) reported belonging to a club, local community league or regional amateur sport organization. Nearly half (46%) of active males belonged to a sport club or community league in 1998, while almost three-quarters (71%) of active females belonged. The four most popular sports in Canada (see previous table) also have the highest number of Canadians belonging to a club.

Table 4.12 Canadians Belonging to Sport Clubs / Community Leagues by Sport, 1998

| Activity | Number Belonging to Clubs | | | Rate of Belonging to Clubs | | | Active Club Participation Rate | | |
|-------------------------------|---------------------------|--------------|----------------|----------------------------|-----------|-------------|--------------------------------|-----------|-------------|
| | Total 000s | Male 000s | Female 000s | Total % | Male % | Female % | Total % | Male % | Female % |
| Population 15 Years and Older | 24,260 | 11,937 | 12,323 | | | | | | |
| Total | 4,599 | 2,338 | 2,261 | 19.0% | 19.6% | 18.3% | 55.3% | 45.5% | 71.3% |
| Golf | 734 | 511 | 223 | 3.0% | 4.3% | 1.8% | 40.7% | 38.6% | 46.8% |
| Hockey (Ice) | 641 | x | x | 2.6% | 5.1% | 0.3% | 42.8% | 42.4% | 49.2% |
| Baseball | 542 | 373 | 169 | 2.2% | 3.1% | 1.4% | 40.5% | 39.1% | 43.8% |
| Swimming | 362 | 139 | 224 | 1.5% | 1.2% | 1.8% | 32.3% | 32.2% | 32.6% |
| Soccer | 294 | 215 | 80 | 1.2% | 1.8% | 0.6% | 39.8% | 39.1% | 42.3% |
| Tennis | 266 | 174 | 92 | 1.1% | 1.5% | 0.7% | 40.4% | 40.1% | 41.1% |
| Volleyball | 262 | 133 | 129 | 1.1% | 1.1% | 1.0% | 35.2% | 33.8% | 36.9% |
| Skiing, Downhill | 257 | 125 | 132 | 1.1% | 1.0% | 1.1% | 39.1% | 36.5% | 41.9% |
| Cycling | 207 | 129 | 78 | 0.9% | 1.1% | 0.6% | 34.0% | 36.0% | 31.2% |
| Skiing, Cross-Country | 192 | 89 | 103 | 0.8% | 0.7% | 0.8% | 37.5% | 42.8% | 33.9% |
| Basketball | 188 | 136 | 52 | 0.8% | 1.1% | 0.4% | 23.9% | 24.7% | 21.9% |
| Weightlifting | 181 | 137 | 44 | 0.7% | 1.1% | 0.4% | 41.6% | 46.6% | 31.4% |
| Curling | 167 | 83 | 84 | 0.7% | 0.7% | 0.7% | 53.5% | 46.4% | 63.2% |
| Badminton | 167 | 90 | 77 | 0.7% | 0.8% | 0.6% | 41.4% | 45.2% | 37.7% |
| Bowling, 10 Pin | 139 | 63 | 76 | 0.6% | 0.5% | 0.6% | 49.3% | 47.7% | 51.3% |
| Football | 128 | x | x | 0.5% | 1.0% | 0.1% | 33.1% | 34.0% | 25.0% |
| Softball | 87 | 40 | 47 | 0.4% | 0.3% | 0.4% | 41.4% | 33.9% | 51.1% |

Source: Sport Canada - Sport Participation in Canada - 1998

Estimates under 35,000 are not reliable and have been suppressed.

Estimates are rounded to the nearest thousandth. Totals may not add due to rounding.

Quebec and Ontario had the largest number of Canadians that belong to a club. However, Prince Edward Island and Nova Scotia had the largest percentage of total population belonging to a club. Manitoba had 142,000 people that belonged to a sport club in 1998, accounting for 16% of its total population and about half of its population that is active in sports.

Table 4.13 Profile of Canadians Who Belong to Sport Clubs, 1998

| Province of Residence | 000s | TP % | Active TP % ^{1/} |
|-----------------------|-------|-------|---------------------------|
| Newfoundland | 84 | 18.8% | 70.6% |
| Prince Edward Island | 29 | 27.0% | 106.9% |
| Nova Scotia | 201 | 26.4% | 81.1% |
| New Brunswick | 137 | 22.4% | 70.7% |
| Quebec | 1,088 | 18.1% | 47.6% |
| Ontario | 1,718 | 18.7% | 58.8% |
| Manitoba | 142 | 15.9% | 53.7% |
| Saskatchewan | 139 | 17.6% | 52.0% |
| Alberta | 511 | 22.6% | 61.3% |
| British Columbia | 550 | 17.2% | 48.0% |

Source: Sport Canada - Sport Participation in Canada - 1998

^{1/} Some percentages are greater than 100 percent.

Benefits of Sports and Reasons for Non-Participation

Active Canadians ranked the following as the most important benefits of sport. The following table shows that health and fitness was the top priority, followed by relaxation. Notably, the social aspect of sports benefits was at the bottom of noted reasons. In the US, a number of socially oriented sports leagues have emerged, tapping the younger urban professional market (aged 22 to 33), with the intent of providing facilities for recreational level team sports. These social leagues organize teams, structure social events, and hold annual championships.

Table 4.14 Sports Benefits, 1998

| Category | Percentage |
|----------------------|-------------------|
| Health & Fitness | 70.6% |
| Relaxation | 68.5% |
| Sense of Achievement | 57.2% |
| Family Activity | 42.5% |
| New Friends | 40.9% |

Source: Sport Canada - Sport Participation in Canada - 1998

As shown previously, sports participation in Canada declined between 1992 and 1998. According to the report, possible reasons for a decrease in sports participation in Canada could include an aging population, economic pressure, limited leisure time, and having other leisure activities to choose from. The reasons for non-participation are listed in the following table.

Table 4.15 Reasons for Non-Participation in Sport - 1998

| Reason | 000s | % |
|------------------------------|-------------|----------|
| Population Not Participating | 14,034 | 57.8 |
| Do Not Have the Time | 4,396 | 31.3% |
| Not Interested | 3,667 | 26.1% |
| Health / Injury | 1,781 | 12.7% |
| Age | 1,775 | 12.6% |
| Disability | 388 | 2.8% |
| Too Expensive | 320 | 2.3% |
| Other | 227 | 1.6% |
| Programs Not Available | 190 | 1.4% |
| Do Not Want to Be Committed | 153 | 1.1% |
| Facilities Not Available | 92 | 0.7% |

Source: Sport Canada - Sport Participation in Canada - 1998

As the age group increased, more reasons were indicated for not participating in a sport. The age group of 35 to 54 gave the most reasons for not participating in sports. The reasons cited most often for this age group for not participating in sports included not having enough time and lack of interest. The reasons cited most often for the population aged 55 and over included age, health/injury, and a lack of interest in participating. Seniors also indicated that programs were not available. Experience suggests that seniors and Boomers in particular are less interested in attending programs where they will be seated with younger people.

Table 4.16 Reasons for Non-Participation in Sport (Number), by Age, Canada, 1998 ^{1/}

| Age Group | Not Interested | Do Not Have the Time | Health / Injury | Disability | Too Expensive | Age | Other | Cannot Committed | Programs Not Available |
|-------------|----------------|----------------------|-----------------|------------|---------------|-------|-------|------------------|------------------------|
| 15-19 | 246 | 157 | | | | | | | |
| 20-24 | 237 | 446 | 65 | | | | | | |
| 25-34 | 623 | 1,231 | 131 | | 103 | | | | |
| 35-54 | 1,627 | 2,155 | 543 | 139 | 137 | 134 | 128 | 75 | 66 |
| 55 and Over | 935 | 407 | 1,007 | 203 | 52 | 1,633 | | | 68 |

Source: Sport Canada - Sport Participation in Canada - 1998

^{1/} Only reasons with estimates of 35,000 or more are included.

4.3 Entertainment / Other Recreation

Related to sports participation are other entertainment-related activities. One of the main reasons cited for people not participating in sports is a lack of time. Overall in 1996, Canadians spent \$5.8 billion on entertainment services, up about 50% in real terms from 1986 (adjusted for inflation). Home entertainment expenditures increased (like cable TV), while attendance to live events decreased between 1986 and 1996. To see what Canadians are spending their entertainment dollars on, see the following table.

Table 4.17 Share of the Entertainment Services Consumer Market 1986-96

| | 1986 | | 1996 | |
|--|--|--------------------------|--|--------------------------|
| | Consumer ^{1/} market (in 1996 \$) | % Share of Entertainment | Consumer ^{1/} market (in 1996 \$) | % Share of Entertainment |
| Entertainment services | 3,884,872 | 100.0% | 5,805,874 | 100.0% |
| Rental of cablevision | 1,539,790 | 39.6% | 2,766,884 | 47.7% |
| Rental of videotapes and videodiscs | 654,853 | 16.9% | 1,008,290 | 17.4% |
| Rental of video games | N/A | N/A | 86,621 | 1.5% |
| Admission to movie theatres | 654,853 | 16.9% | 627,101 | 10.8% |
| Attendance at live staged performances | 619,456 | 15.9% | 670,012 | 11.5% |
| Attendance at live sports events | 415,920 | 10.7% | 401,083 | 6.9% |
| Admission to other activities and venues | N/A | N/A | 184,512 | 3.2% |
| Rental of satellite services | N/A | N/A | 61,371 | 1.1% |

Source: Statistics Canada

^{1/} The consumer market was calculated by multiplying the average expenditure per household by the estimated number of households. The estimated number of households includes only full-year households.

The Canadian population reportedly spent about 4% of total commodity sales on sporting and leisure goods in 2002. Looking at the sales of commodities at large retailers specifically, about 8% of large retail sales are sporting and leisure goods, while toys, games, hobby supplies, and books and other reading material account for another 14%.

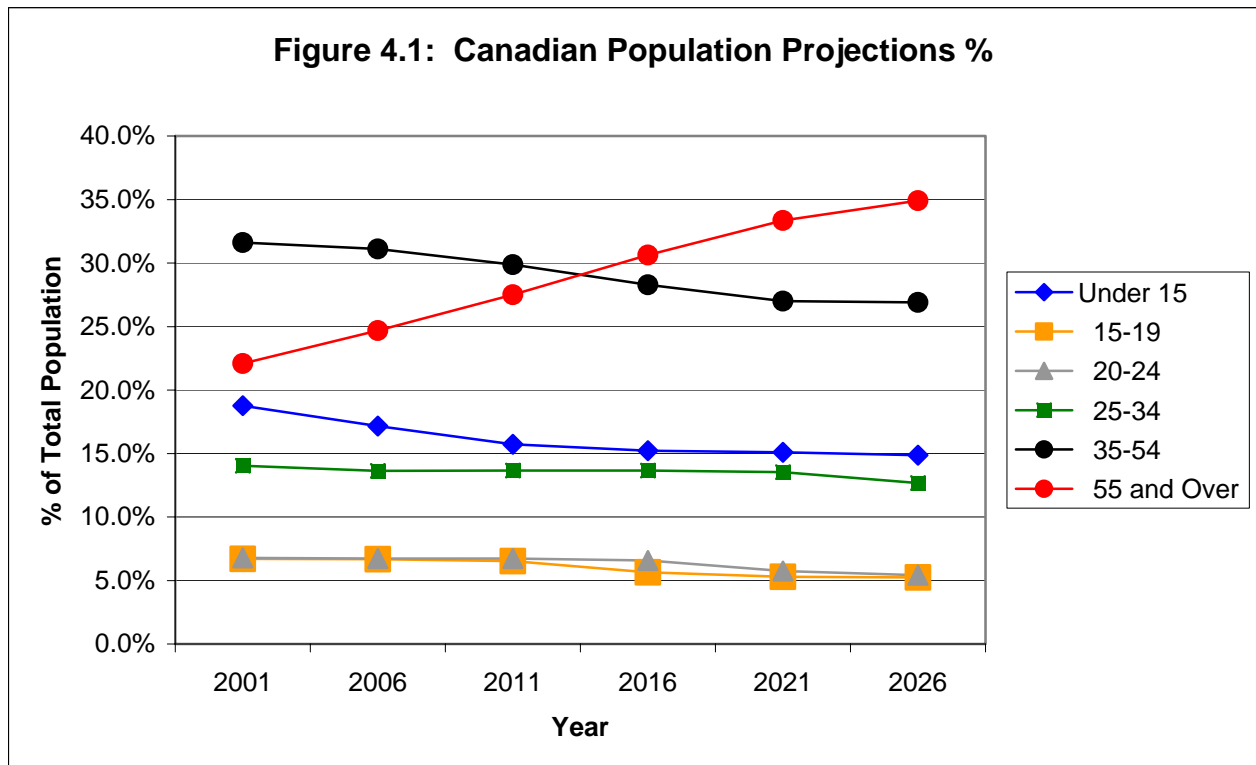
Table 4.18 Sales of Commodities of Large Retailers

| | 1998 | 1999 | 2000 | 2001 | 2002 | % 2002 | CAGR 1998 to 2002 |
|---|-------------------|-------------------|-------------------|-------------------|-------------------|---------------|-------------------|
| Total Commodities | 67,954,285 | 72,204,100 | 76,214,863 | 80,514,602 | 85,411,922 | 100.0% | 5.9% |
| Sporting and leisure goods | 3,243,097 | 3,485,436 | 3,745,564 | 4,139,157 | 4,466,681 | 5.2% | 8.3% |
| Toys, games & hobby supplies | 1,040,479 | 1,089,055 | 1,126,955 | 1,304,510 | 1,382,724 | 1.6% | 7.4% |
| Books, newspapers and other periodicals | 322,843 | 366,624 | 383,138 | 418,524 | 413,856 | 0.5% | 6.4% |

Source: Statistics Canada, CANSIM II, Table 080-0009. Last modified: 2003-07-18.

4.4 Sports Participation in the Future

The previous information indicates that there is a relationship between age, sex, income, and education levels in regards to sports participation. One of the most significant factors for future sports participation is that of the aging population in Canada. Using modest projections and 2000 population estimates, Statistics Canada generated population projections for Canada. These projections, as shown in Figure 4.1 indicate that the percentage of the population in Canada age 55 and over will increase from an approximate 22% in 2001 to 35% in 2026.



The impact of this aging population on many aspects of Canadian society, including sports participation, will require serious discussion about the direction of Canadian sports, sports participation, and related issues including demand for sports facilities. Specific implications include:

- Decreased emphasis on team sports
- Growth of individualized wellness and fitness programs
- Increased demand for a greater diversity of active and leisure programming

In both Canada and the U.S., the Baby Boom generation has had a substantial impact on delivery of public services, beginning with the surge in school construction in the 1950's. Now with many Boomers at or nearing retirement, a new set of demands will be generated, which will have links to sustaining health, welfare and leisure. As important is the smaller Echo boom, the children of the Boomers, who are now raising families of their own.