2021-2024 QUAD DATA REPORT

Our goal for this report is to explore correlations we see in the membership data over the last quad and beyond to help us identify areas that will help us design strategy, policy, and support to increase retention, grow the sport, and improve performance.

MIKE LEWIS/ USA SWIMMING

MEMBERSHIP AT A GLANCE

Membership Totals by Member Type and Membership Year

SEASON YEAR	PREMIUM	OUTREACH	FLEX	SEASONAL	SINGLE MEET	TOTAL
2008	254,046	3,175	0	33,715	181	291,117
2009	282,260	3,939	0	34,907	256	321,362
2010	282,245	4,677	0	33,090	430	320,442
2011	286,188	5,083	0	30,223	170	321,664
2012	295,532	5,496	0	30,201	148	331,377
2013	334,272	6,443	0	29,666	337	370,718
2014	332,780	7,237	0	27,764	316	368,097
2015	328,976	8,231	0	25,369	356	362,932
2016	327,689	8,432	0	23,901	354	360,376
2017	343,956	10,778	0	25,312	471	380,517
2018	335,561	11,376	1	24,833	193	371,964
2019	316,761	10,664	25,299	18,804	151	371,679
2020	285,593	8,507	26,183	6,149	32	326,464
2021	233,405	4,743	44,384	13,838	27	296,397
2022	292,069	6,087	41,833	14,059	59	354,107
2023	279,187	6,976	29,781	17,131	175	333,250
2024	283,240	7,090	29,656	14,038	142	334,166

MEMBERSHIP TRENDS

- Since 2009, total membership has grown year-over-year 7 out of 16 times, including the 2024 season.
- Athlete membership totals peaked at 380K athletes in 2017.
- The largest increase in athlete membership came in 2013.
- The largest decreases in athlete membership came in 2020 and 2023.

OLYMPIC MEMBERSHIP SPIKE

- In 2009, 2013, and 2017, USA Swimming athlete membership grew by 30K, 39K, 20K respectively, good for 10.4%, 11.9%, 5.6% growth.
- In 2022 (following the postponed Olympics and COVID), membership grew by 57K or 19.5%. This significant spike represented both a post-Olympic bump and a return to sport after COVID.

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

2021-2024 QUAD DATA REPORT

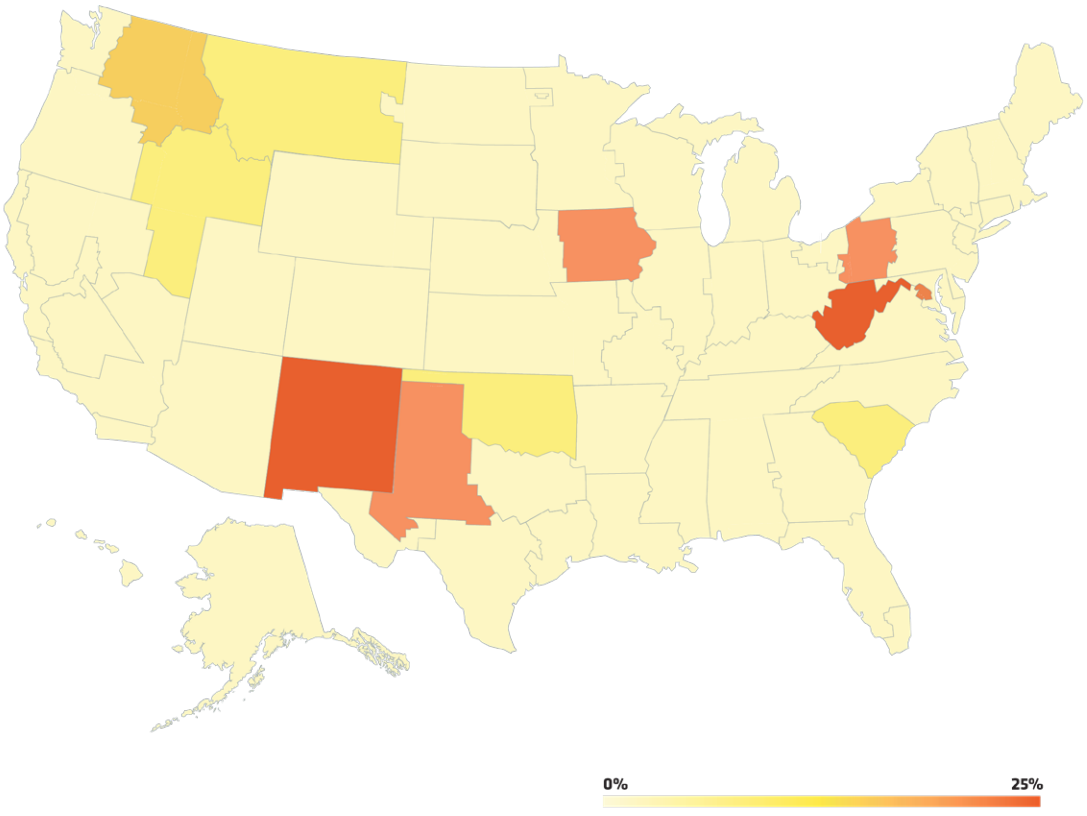
LSC GROWTH DETAILS

- Since 2022, four LSCs have increased athlete membership each membership year.
  - Potomac Valley: 7% total growth (917 athletes)
  - Metropolitan: 10% total growth (1013 athletes)
  - New Mexico: 3% total growth (75 athletes)
  - Iowa: 3% total growth (133 athletes)

- In total, 10 of 59 LSCs have more athlete members in 2024 than 2019, but only five have exceeded their all-time highs: PV, IA, AM, SC, and WT.

GROWTH OF LSC ATHLETES

2019-2024



Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

2021-2024 QUAD DATA REPORT

CLUB COUNT

The table below shows USA Swimming's member club profiles illustrating club size and percentage increases/decreases year-over-year.

- The number of clubs is down significantly from the peak of over 3100 clubs in 2019 to 2745 clubs in 2024.
- While we know that some of these losses are due to mergers with other clubs, a loss of 350+ member clubs impacts capacity and retention.
- New clubs average just 17 members in their first year of operation vs. the national average of over 120 members.

YEAR	0-100	0-100 GROWTH	101-250	101-250 GROWTH	251-400	251-400 GROWTH	400+	400+ GROWTH	TOTAL	TOTAL GROWTH
2009	1608	0.0%	900	0.0%	174	0.0%	70	0.0%	2752	0.0%
2010	1700	5.72%	884	-1.78%	177	-1.72%	62	-11.43%	2823	2.58%
2011	1768	4.0%	879	-0.57%	161	-9.04%	75	20.97%	2882	2.13%
2012	1815	2.66	881	0.23%	174	8.07%	80	6.67%	2950	2.32%
2013	1710	-5.79%	958	8.74%	213	22.41%	111	38.75%	2992	1.42%
2014	1806	5.61%	939	-1.98%	190	-10.8%	112	0.9%	3047	1.84%
2015	1839	1.83%	940	0.11%	185	-2.63%	106	-5.36%	3070	0.75%
2016	1874	1.9%	928	-1.28%	189	2.16%	100	-5.66%	3091	0.68%
2017	1823	-2.72%	946	1.94%	224	18.52%	115	15.0%	3108	0.55%
2018	1844	1.15%	945	-0.11%	208	-7.14%	104	-9.57%	3101	-0.23%
2019	1869	1.36%	925	-2.12%	204	-1.92%	111	6.73%	3109	0.26%
2020	1912	2.3%	811	12.32%	180	-11.76%	80	-27.93%	2983	-4.05%
2021	1721	-9.99%	766	5.55%	172	-4.44%	81	1.25%	2740	-8.15%
2022	1629	-5.35%	816	6.53%	228	32.56%	120	48.15%	2793	1.93%
2023	1596	-2.03%	786	-3.68%	211	-7.46%	109	-9.17%	2702	-3.26%
2024	1630	2.13%	798	1.53%	212	0.47%	105	-3.67%	2745	1.59%

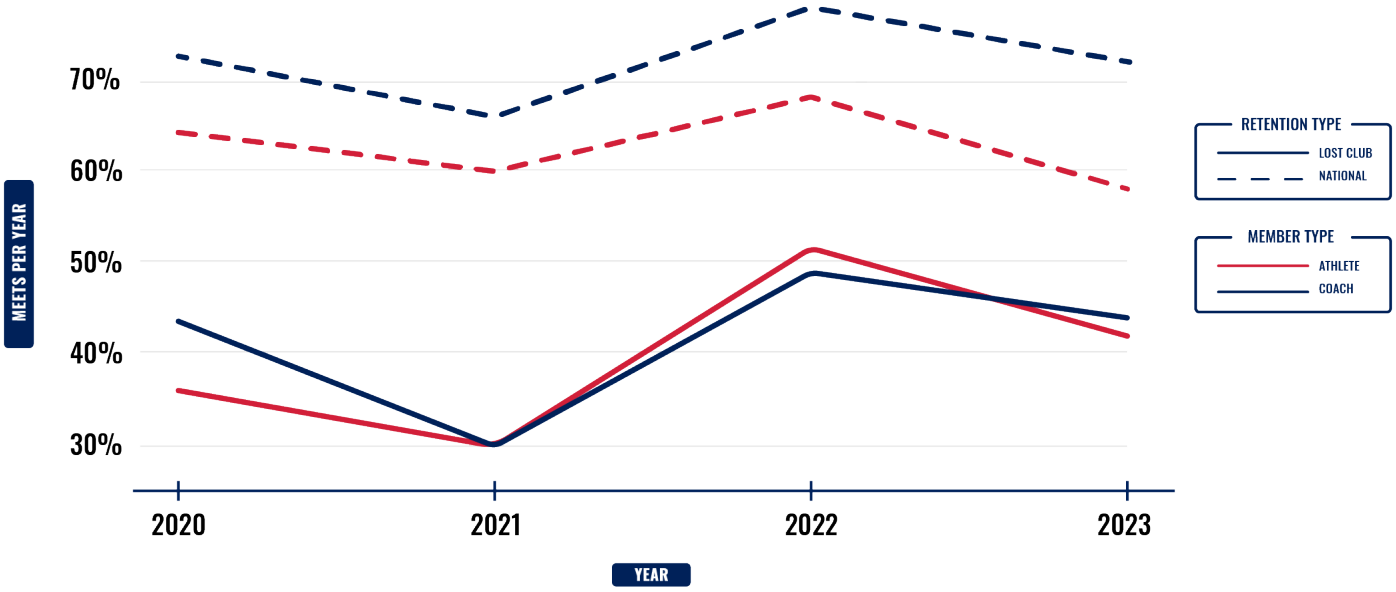
Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

CLUB COUNT VS. MEMBERSHIP GROWTH AND CAPACITY

On average, if a USA Swimming club ceases operation, only 40% of those athletes join a new club and are retained. For comparison, the 2024 total retention rate was 71%. To extrapolate the data, over 41,000 athletes were a part of clubs that failed or merged with another club, representing 13,000 lost USA Swimming members.

RETENTION RATE FROM LOST CLUBS AND MEMBER RETENTION

2020-2023



Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

2021-2024 QUAD DATA REPORT

CLUB CAPACITY/CLUB SIZE

Over the past three seasons, the average number of athletes per club has exceeded 120 athletes. Average club size exceeding 120 athletes had only happened four other times prior to 2022. USA Swimming will always be a collection of larger clubs and smaller clubs. Still, historical trends indicate a "ceiling" on membership growth until one of the following happens:

1) Clubs increase capacity to accommodate more members
2) New clubs enter the market in areas of need (where existing club capacity is capped)

SEASON YEAR	CLUBS	CLUB GROWTH	ATHLETES	ATHLETE GROWTH	ATHLETES PER CLUB
1994	2,527	NAN%	205,852	NAN%	81
1995	2,624	3.8%	226,092	9.8%	86
1996	2,669	1.7%	236,064	4.4%	88
1997	2,723	2.0%	251,225	6.4%	92
1998	2,795	2.6%	252,705	0.6%	90
1999	2,804	0.3%	253,838	0.4%	91
2000	2,792	-0.4%	260,588	2.7%	93
2001	2,811	0.7%	269,968	3.6%	96
2002	2,775	-1.3%	266,184	-1.4%	96
2003	2,870	3.4%	272,171	2.2%	95
2004	2,797	-2.5%	269,278	-1.1%	96
2005	2,784	-0.5%	285,559	6.0%	103
2006	2,769	-0.5%	284,769	-0.3%	103
2007	2,773	0.1%	287,209	0.9%	104
2008	2,783	0.4%	291,117	1.4%	105
2009	2,752	-1.1%	321,362	10.4%	117
2010	2,823	2.6%	320,442	-0.3%	114
2011	2,883	2.1%	321,664	0.4%	112
2012	2,950	2.3%	331,377	3.0%	112
2013	2,992	1.4%	370,718	11.9%	124
2014	3,047	1.8%	368,097	-0.7%	121
2015	3,070	0.8%	362,932	-1.4%	118
2016	3,091	0.7%	360,376	-0.7%	117
2017	3,108	0.5%	380,517	5.6%	122
2018	3,101	-0.2%	371,964	-2.2%	120
2019	3,109	0.3%	371,679	-0.1%	120
2020	2,983	-4.1%	326,464	-12.2%	109
2021	2,740	-8.1%	296,397	-9.2%	108
2022	2,793	1.9%	354,107	19.5%	127
2023	2,702	-3.3%	333,251	-5.9%	123
2024	2,745	1.6%	334,166	0.3%	122

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

2021-2024 QUAD DATA REPORT

ATHLETE RETENTION

To help member clubs identify the core factors driving athlete retention, USA Swimming tested over 30 athlete retention correlation metrics. After determining correlation values, USA Swimming tested the statistical significance of those correlations utilizing inferential statistics.

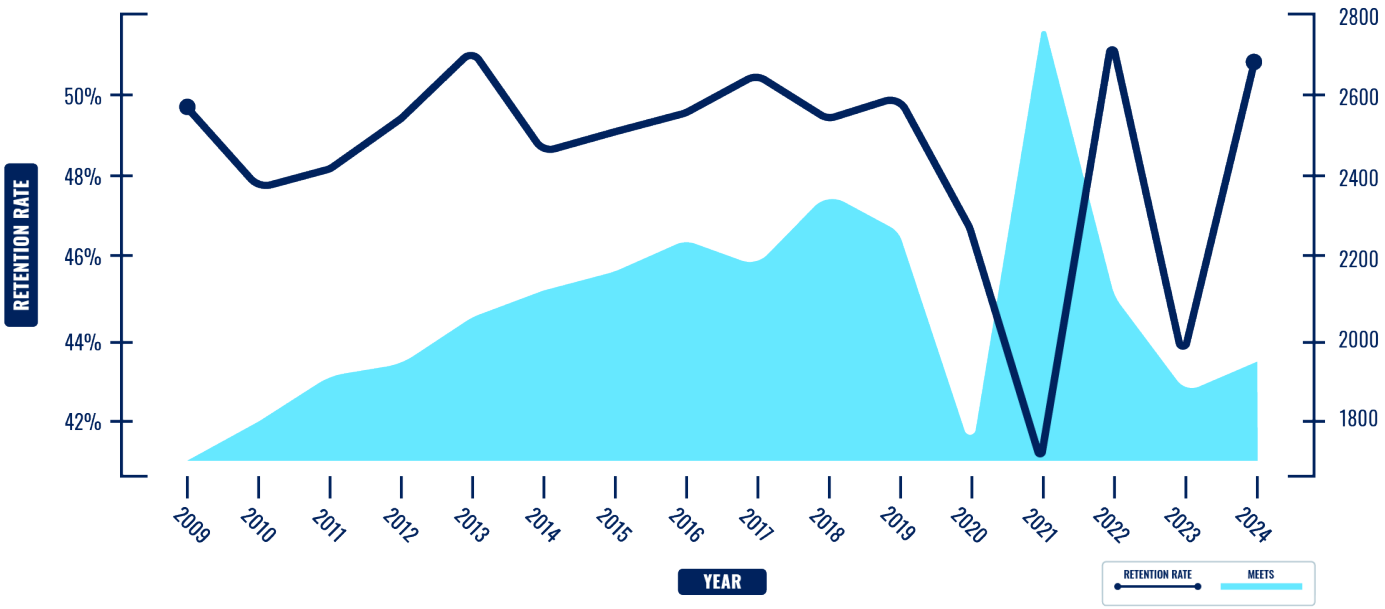
The following nine factors (split into three main categories) all had statistically significant correlations with athlete retention.

1) Access to Competition

- The higher the percentage of athletes who compete, the higher the athlete retention rate.
- The more races or "splashes" completed across a season, the higher the athlete retention rate.
- As more meets or competitions are offered, the athlete retention rate increases.

10&U RETENTION RATE AND SINGLE DAY SANCTION MEETS OFFERED BY YEAR

2009-2024

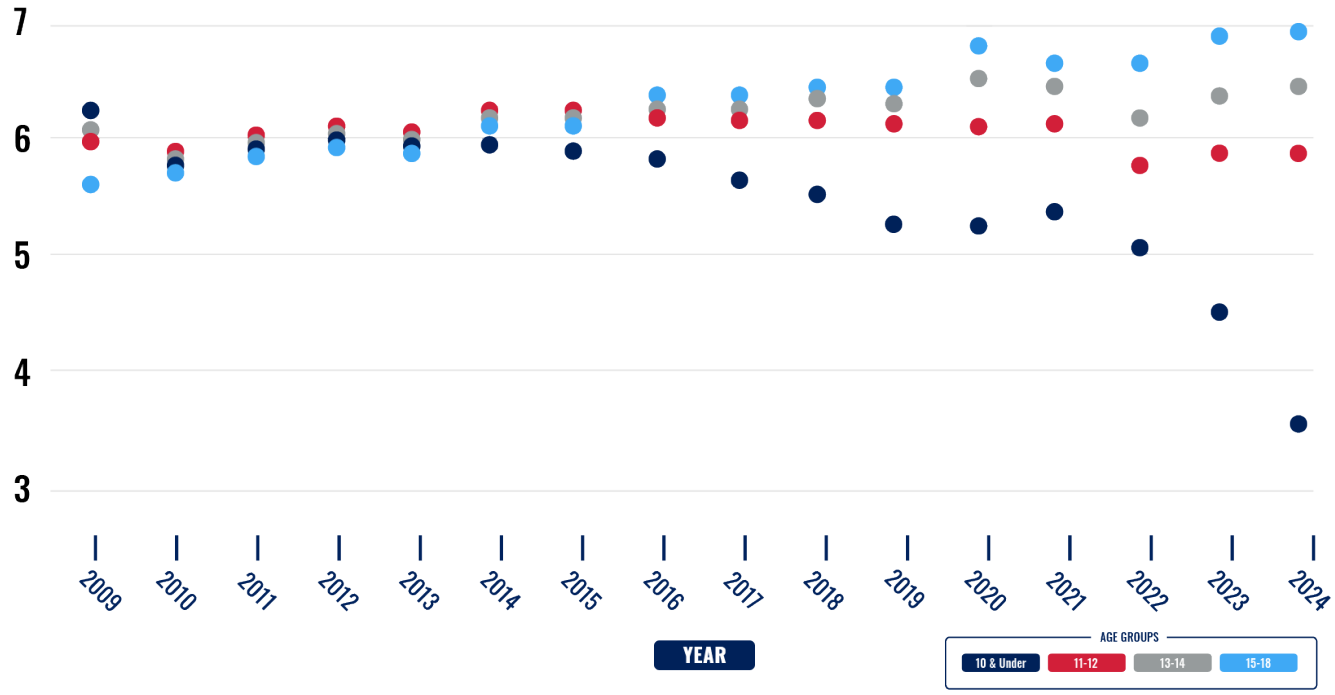


In general, more access to competition drives athlete retention. That correlation highlights problems with 10&U athlete retention as they compete in fewer meets per season. USA Swimming and LSCs must strive to make access to competition easier, with fewer barriers to entry, including reducing the cost of splash fees, sanction fees, etc.

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

SANCTIONED MEETS ATTENDED BY YEAR PER AGE GROUP

2009-2024



Interestingly, older athletes are rising above the ~ 6 meets per year baseline during the 2024 membership year, while the 12&U age group continued to trend below the baseline, particularly the 10&U age group.

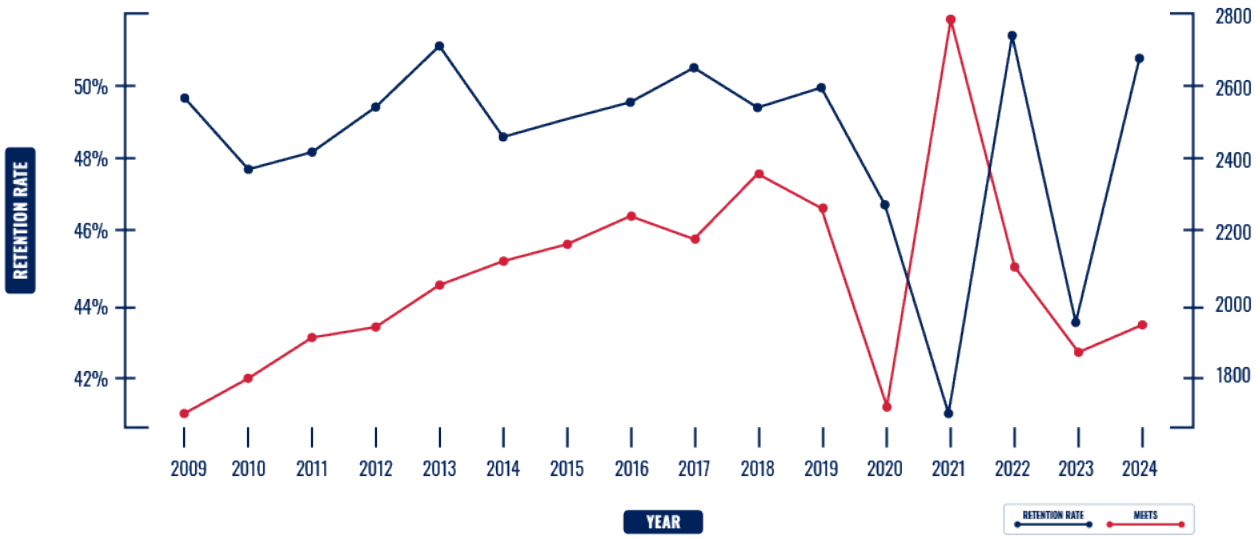
2) Competition Experience

- As average meet length decreases, athlete retention increases.
- When the number of one day meets increases, athlete retention increases.
- When the number of two day meets decreases, athlete retention increases.

Like simplifying access to competition, the competition experience also has a statistically significant impact on athlete retention. Athlete retention increases as average meet length decreases. This fact further highlights the importance of single day sanctioned meets and other strategies to simplify and shorten competitions.

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

10 & UNDER RETENTION RATE AND SINGLE DAY SANCTIONED MEETS OFFERED BY YEAR



The impact of COVID forced USA Swimming and LSCs to offer more sanctioned smaller meets and more one-day meets. That contributed to 2022 as one of the highest retention seasons in USA Swimming history. Previous spikes in retention are correlated with post-Olympic years, and with a gradual increase in one-day sanctioned meets, we see the average retention rate per quad increase.

One potential reason for new members leaving the sport is the lack of competitions. The past three years, new members have competed in fewer meets than the National average of six meets.

AGE GROUP	MEETS ATTENDED
10 & UNDER	4.33
11-12	3.86
13-14	3.34
15-18	3.11

Average number of meets competed in by a new member in their first year

When analyzing the profile of athletes who have left the sport of swimming over the past three years, The following trend emerged related to competitions:

- Compared to the athlete average of 6 sanctioned meets per year, members that left the sport competed in 1.3 sanctioned meets over their career, on average.

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth

3) Club Experience

- As non-athlete retention increases, athlete retention increases.
- As average club size increases, athlete retention increases.
- As coaching tenure increases, athlete retention increases.

In addition to competition access and the competitive experience, the club experience significantly impacts athlete retention. Longer-tenured coaches correlate with higher athlete retention rates.

Club size is more likely correlated to athlete retention (vs. causation). Larger clubs tend to have longer coaching tenures and higher non-athlete retention rates, which are also highly correlated with athlete retention rates. We need to research coach stability within different subsets of small programs to better understand the impact of coaching tenure, club size, and athlete retention.

USA Swimming is not projecting that larger clubs will lead to higher retention rates in all cases. For example, we have traditionally seen small institution-based programs like YMCAs and health clubs with high athlete retention at the 10&U level (15% higher than average) and above-average coach retention. The retention advantage of those small institutional clubs does dissipate in older age groups, which requires greater analysis.

When analyzing the profile of athletes who have left the sport of swimming over the past three years, The following trend emerged related to club size:

- When analyzing clubs that lost 50 over more athletes over the past three years, the average coaching tenure of these clubs was 6.9 years, far less than the national average of 10.2 years

Growth By Retention

The key to USA Swimming athlete membership growth is ensuring family members receive the best experience possible, to include more access to competition, a better competitive environment, and an optimal club experience. “Growth by Retention” is the most effective way to grow membership. If USA Swimming retained just 2% more members each year, the total number of athletes would approach 360,000 by the end of the 2028 quad.

While USA Swimming is likely to achieve an Olympic year spike this coming season, it is imperative to build on and retain that growth. USA Swimming is committed to building programming to help maintain and enhance that membership spike throughout the Quad. Best practices from across our community can help build successful clubs and LSCs. We must be open to new ideas and more widely implement those proven successful in attracting and keeping families.

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PERFORMANCE

Age Group Performance

The Paris Olympic Games proved that swimming is getting much faster at the top. Domestically, swimming is also getting much faster; college swimming is faster than ever, and Olympic Trials standards have reached previously unthinkable territory.

Within the age group ranks, the story is slightly different. There are still phenoms destroying national age group records formerly held by Olympic legends, but drilling into the details shows progress at some ages has stagnated.

USA Swimming focused on the 100 FR SCY for swimmers aged 10 through 16 for this analysis. The analysis compares the 100th-ranked performers for each age and competition category across all 17 seasons.

For female 100 Freestyle, you can see that the 100th-ranked 16-year-old performer in the country is 2.5% faster in 2024 than in 2008. That trend does not continue for 10-year-old females. The 100th-ranked 10-year-old female 100 Freestyler was faster in 2008 than in 2024. When comparing 2024 vs. 2016 times, only 14-year-olds and 16-year-olds were faster than their counterparts.

FEMALE	10	11	12	13	14	15	16
IMPROVEMENT SINCE 2008	1.2%	-0.4%	-0.7%	-2.3%	-2.3%	-1.7%	-2.5%
IMPROVEMENT SINCE 2016	3.1%	1.7%	1.0%	0.2%	-0.1%	-0.0%	-0.6%

Male 100 Freestyle data tells a slightly better story, although there are still concerns at the 10-year-old and 11-year-old age groups.

MALE	10	11	12	13	14	15	16
IMPROVEMENT SINCE 2008	-0.6%	-1.4%	-1.8%	-2.1%	-2.7%	-3.5%	-3.1%
IMPROVEMENT SINCE 2016	1.7%	1.3%	0.4%	-0.0%	-0.5%	-1.1%	-0.8%

When drilling into the 10-year-old data more, the 100th-ranked performer in the country is faster in 2024 than in 2008 in only 13 out of the 24 10&U SCY events across each gender. The 100th-ranked performers in some events, like the 200 FR and 500 FR, are over a full percent slower than in 2008.

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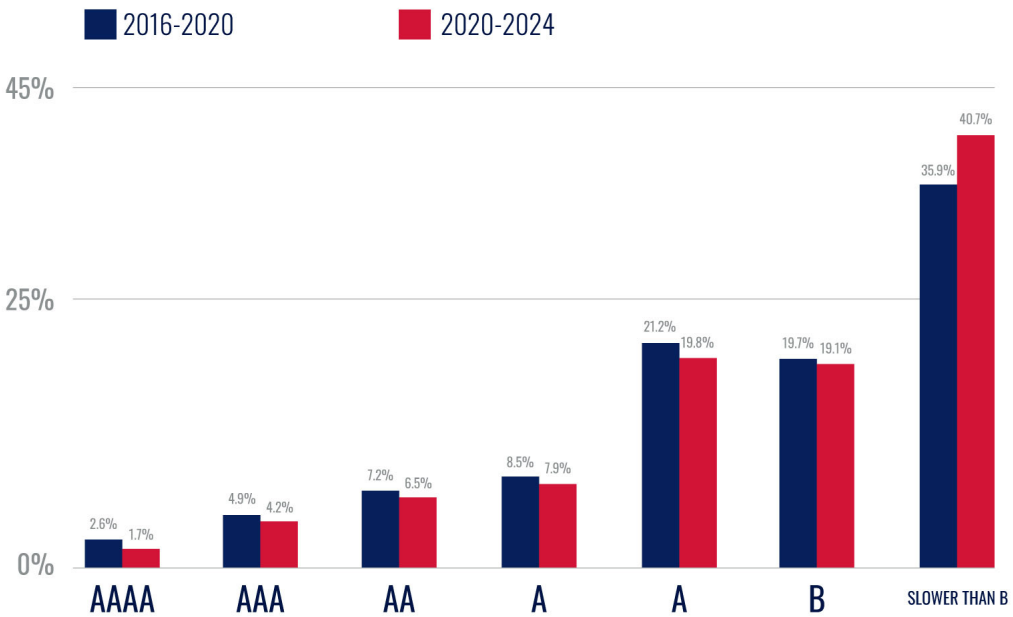
2021-2024 QUAD DATA REPORT

The story becomes even more dire when looking at 2024 event ranks vs. 2016 event ranks. There is no primary SCY event for 10&U Males or Females where the 100th-ranked performer is faster in 2024 than in 2016.

Much of the decrease in performance of 12&U athletes, specifically 10&U athletes, can be attributed to access to competition and lower athlete retention rates.

14&U TIME STANDARD REPRESENTATION

2016-2024



Like the age group analysis, the chart above shows the percentage of competing swimmers and the highest time standard they achieved. Quad over quad, there is a negative difference between all but the "Slower than B" time standard. For example, during the 2020 quad, 7.5% of 14&U swimmers achieved an AAA or AAAA time standard. During the 2024 Quad, only 5.9% of 14&U swimmers achieved a AAA or AAAA time standard.

These performance trends, coupled with the fact that Motivational Quad Time Standards are slowing down for the younger age groups, raise important questions about age group performance. While the sport is making strides at the top level, we are not seeing the same depth as in the past. The age group performance trends relate directly to the decline in average competitions among 12&U athletes starting around 2016. Access to competitions is crucial for both retention in the sport and performance at the top levels. The upcoming Quad is crucial for building a strong base and developing the talent necessary to maintain our position as the leading swimming country in the world in 2032 and beyond.

Source: USA Swimming, Inc. portion of the 2019-2023 external financial audits, all U.S. dollars rounded to the nearest thousandth