Participation numbers continue to shrink as the effect of the economic slowdown and shrinking demographic patterns reduce the number of people playing. However, help in getting America fit may be coming from a most unexpected place.
2010 PREVIEW

Concepts To Keep In Mind

Unless the source is otherwise indicated, all statistics are from a national online participation survey conducted for a consortium of sporting goods associations by Sports Marketing Surveys. A panel of more than 41,000 individuals was surveyed during early 2010. For more on the survey and its methodology, see page 63.

Participation frequency. Participants in each activity are grouped in two categories: total participants and core participants. Core participants are made up of those defined as frequent and regular. We focus on core participants because this group contains people most likely to buy equipment and services and pay user fees related to the sport or activity. The number of participation days used to define a regular or frequent participant varies according to the activity and is determined statistically. For example, it takes 100 days of participation for an individual to be categorized as a frequent participant in fitness activities. In some team sports, 52 days are required for frequent participation; in others, 25. All charts and tables remind the reader of these requirements. Additional data on casual participants, regular participants and frequent participants is available in the SGMA Single Sport Reports or in custom form.

Companies interested in additional consumer data can go back to the survey panelists with follow-up questions. These secondary surveys can produce important insights about such topics as motivation to participate, purchasing habits/ intentions and depth of commitment to a given activity. For additional information please contact, Neil Schwartz at Sports Marketing Surveys, neil.schwartz@sportsmarketingsurveys.com or 561-427-0647.

Sample Volatility. All research is subject to sample volatility, also known as sample error. It is the degree to which any survey may differ from the results that would be obtained from a complete census of every person in the U.S. Large samples generally produce smaller sampling errors.

This report is based on an online survey panel maintained by Synovate. Synovate maintains a panel of more than 1 million members. The questionnaire and methodology was developed by Sports Marketing Research, Jupiter, Fla., under the cooperative sponsorship of SGMA, the National Golf Foundation, the Outdoor Industry Foundation, Snow Sports Industries, Tennis Industry Association and IHRSA.

The survey was conducted during late January 2010. Over sampling of minority ethnic groups took place to boost response from groups that typically under-respond to such surveys.

A weighting technique was used to balance the data to reflect the total U.S. population aged 6 and older, numbering 281,658,000.

The participation estimates for the year 2000 were based on historical year-by-year percentage changes that occurred between 2000 and 2005 as found by previous national studies sponsored by SGMA.

Because the questionnaire and methodology have changed, readers should not make direct comparisons between this report and data collected prior to 2006. However, we believe trend data continues to be directionally accurate.

For more information about sports participation and the sporting goods industry visit: www.SGMA.com.

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To Our Readers

2010 is the twenty-third annual report on the state of sports and fitness participation in America produced by the SGMA. During this twenty plus year period, SGMA has found significant changes in the way American's participate in sports and fitness activities. However, now, perhaps more than at any other time, sports and fitness participation is under pressure from unexpected sources, but may be getting help from a most unexpected source.

We continue to believe the basic fabric of participation is still woven from fitness activities and team sports. The majority of Americans continue to have their first exposures to physical activity through school physical education programs and team sports at the school or club level. In this report a major section correlates participation in PE in schools to participation in sports and fitness later in life. And participation in team sports often leads to participation in individual sports as people look for ways to stay active.

Since 1987 we have seen overall participation increase in terms of numbers by 4% from 73% to 77%. The increase in participants has roughly kept pace with the increase in the US population. The gender balance has changed significantly as more women participated and their increased participation is in large part responsible for driving the numbers up. However, in our research for 2010, we saw an increase in those NOT participating in any of the 117 activities of .4%; the first time we have measured such a decline. There are now 64.6 million Americans who do not participate in any physical activity. We saw the first decline in core participants in 2009 due to the severe economic recession and those numbers have continued to decline in 2010.

It is easy, and accurate to a large degree, to attribute the participation decline to the severe dip in the economy, but there are other factors at work changing the way adults/parents, young people and kids look at participation in sports and fitness.

Parental concerns have been raised by health issues including the increased awareness of head injuries and related concussion issues, primarily in football, though extending to other sports. Many parents are questioning the wisdom of letting their children play football, basketball, soccer or other activities. In a related field, the American Orthopedic Society for Sports Medicine, led by Dr. James Andrews, an eminent surgeon, with a large practice among professional athletes, has created STOP, a website and program dedicated to the goal of stopping childhood overuse sports injuries. Their belief is specialization in one sport is harmful to a young athlete and should be discouraged. In concert with the AOSSM, the CDC is reporting more than half of all childhood sports injuries are preventable.

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Doctor James Andrews

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US Center for Disease Control

Not only is the medical community raising issues of serious concern, “green” issues are being explored, relating to sports and fitness activities. National Geographic, in an April 2010 article on water use, pointed out, one round of golf in Florida required 3,000 gallons of water. With 38 millions rounds played in Florida, the game requires 115 billion gallons of water a year just in Florida. A fact not lost on the younger “green conscious “ consumer.
However, while the industry faces unexpected questions from some, it is also getting support from a former "enemy". The movement to "motion game experiences" led by the Nintendo Wii, Microsoft Xbox 360 Kinetics and Sony’s PlayStation.

From the Kinect website, Microsoft is going straight for the physical approach "Each game is special because it's designed to get you off the couch and into the game. Oh, and before we forget, Kinect games are designed for full body play, so each one is as unique as the person playing them. Yep, that means you."

While these issues are not going to change the ever-present interest in sports and exercise activities that form the core of our industry, we need to realize there are new priorities, new perspectives and values to be recognized and addressed as an industry. While we must address the obesity crisis and make exercise a daily priority, we can no longer look at the electronics industry as the enemy. The support of the First Lady and the White House is important, but addressing the consumer where their focus is, must become a long-term goal for our industry.

With the wide variety of leisure time choices available, the sports and fitness industry must continue to address the real need to get more Americans active in sports and fitness. Lobbying at both the national and grassroots level by the sports and fitness industry, healthcare incentives and partnering with industries that will profit from our user population becoming more active are steps our industry must take to grow.

We will attempt to highlight opportunities and challenges for the industry in this report and hope you find it of value.

We welcome your comments.

Thomas J. Cove
President & CEO
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Visit [www.sgma.com/reports](http://www.sgma.com/reports) to order your 2010 Sports Participation in America Report Today!

SGMA Research powered by Sports Marketing Surveys (SMS) is the sole provider of the marketing research and analysis for the Sporting Goods Manufacturers Association (SGMA). This partnership places SMS at the forefront when it comes to marketing research for all things sport, sports participation and current trends in sports.

More information about SMS can be found at [www.sportsmarketingsurveys.com](http://www.sportsmarketingsurveys.com) or contact Neil Schwartz at neil.schwartz@sportsmarketingsurveys.com or 561.427.0647.

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