Special Message From SFIA Research

For the past 107 years, the Sporting Goods Manufacturers Association (SGMA) has been the leading source of research-based knowledge for the sports and fitness industry. As you will note by the new logo above, the Sporting Goods Manufacturers Association has recently transitioned to a new name for our organization: **Sports & Fitness Industry Association**, with the acronym **SFIA**. The foundation of our trade association and the core constituents who benefit from an affiliation with our organization remains the same. However, we believe the new name represents a much clearer reflection of our current and future membership. This is not a shift in philosophy for our organization. It is simply a more accurate and transparent indication of the broader industry segments that we serve.

This cover page serves to make you aware of our new name and simultaneously explains why you will see references to SGMA throughout research reports that pre-date our transition from SGMA to SFIA.

For more information related to the rebranding process, please visit the SFIA website at [www.sfia.org/about/sfiafaqs](http://www.sfia.org/about/sfiafaqs) to review our FAQ’s. You may also contact SFIA Headquarters at 301.495.6321.
2012 Sports, Fitness and Leisure Activities Topline Participation Report

Sporting Goods Manufacturers Association
Methodology ................................................................. 1
Introduction ................................................................. 2
Participation Trends ....................................................... 4
Activity Levels ............................................................. 6
Spending Trends ............................................................ 10
The PE Pathway ............................................................. 15
Participation by Age ....................................................... 19
Non-Participant Interests .................................................. 21
Election Plans ............................................................... 22
Sports Participation Data .................................................. 23
Method for the Participation Topline Report

This Overview Report from the Sporting Goods Manufacturers Association (SGMA), is produced by a partnership of six of the major trade associations in US sports, fitness and leisure industries. This report includes a high level of detail when it comes to sports, fitness and leisure activity participation as well as topline information from the Physical Activity Council (PAC) Report. 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 information about each sport, please contact sgmaresearch@sgma.com

During January and February of 2012, a total of 38,172 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 Synovate. A total of 15,113 individual and 23,059 household surveys were completed. The total panel is maintained to be representative of the US population for people ages 6 and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2011 participation survey sample size of 38,172 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 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants.

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, household size, region and population density. The total population figure used was 285,753,000 people ages six and older.

In this year’s report we have adopted a slightly revised projection methodology that provides an even higher degree of accuracy. The technique of using a “two-year rolling average” measurement is commonly used in research as a way to effectively double the sample size to provide a stable base for all projections that derive from the data. This is particularly beneficial for the sports with participation rates of less than one percent. Consequently, with this change, we have gone back and re-projected all participation totals beginning with the 2008 participation collection to reflect this change.

If you have specific questions regarding this change in methodology, please get in touch with Sports Marketing Surveys USA at usa@sportsmarketingsurveysusa.com or (561) 427-0647.
Welcome to the 2012 edition of the Sports, Fitness and Leisure Activity Topline Participation Report from the Sporting Goods Manufacturers Association (SGMA). Since 1906, the SGMA has been dedicated to promoting the growth and vitality of the sporting goods industry. We are particularly proud of our long history of publishing the most comprehensive view available of American sports and fitness activities.

The enclosed report, a broad overview of all physical activity trends, signals the start of a very active report season for our organization. Over the next several weeks, we will release several cutting-edge reports featuring detailed insights to analyze the sports and fitness landscape in this country. The SGMA’s Annual State of the Industry, US Trends in Team Sports, Tracking the Fitness Movement and Manufacturers Sales By Category reports are in development and will be available free to our member companies and for purchase by non-members. We’re also working on dozens of in-depth single sports reports, from running to basketball to aquatic exercise to cardio kick boxing. Developing data-driven insights, relevant and useful to our members’ decision-making processes, is a primary benefit SGMA provides. We encourage you to take advantage of our research services.

This year’s Topline Report tells a familiar story, both good and bad. On the positive side, in 2011, more than 217 million Americans took part in one of the 119 sports, fitness and leisure activities that we measure. Starting on page 23, you can get an in-depth look at which sports are growing and which ones are not. Remember that this data reflects all venues of play including recreational sports as well as those played in schools and even on the playgrounds. We break down casual participation versus regular and frequent play, offering an understanding of opportunities for growth and well as best targets for differentiated new products. This year’s report also includes relatively new activities such as boot-camp style cross training. Further, we break out swimming as both a fitness and team activity, and mixed martial arts for fitness and competition, which makes complicated year-to-year comparisons but is essential to reflect key trends.

While this report focuses a great deal on what activities and sports are growing, we are also saddened to report that 68.2 million Americans are totally inactive. The term “inactive” means, by our definition, individuals who self-report they did not engage in any of the sports and activities tracked in this report at least once during the course of the year. This figure is up from 67.1 million in the previous year or an increase of 1.6 percent. It’s a shockingly large number, and certainly a clarion call for our country to get off the couch. While we recognize our nation’s obesity crisis is a challenge requiring a multidisciplinary solution, more and more science indicates increasing physical activity may be one of the most effective and accessible responses available. The sporting goods industry can play a positive role in getting people physically active, and maintaining an active lifestyle for years. As such, inactivity trends and data points are explored in these pages. Please feel free to contact us at SGMA if you want to learn more about what we’re doing to combat the alarming inactivity situation.

Finally, remember this is a look at the very topline. There is a great deal of data behind these numbers that can tell a more detailed story. I urge you to contact us should you have any questions and we can get you the story behind the numbers in this report.

In sport and fitness,

Tom Cove
President & CEO
Sporting Goods Manufacturers Association
Physical Activity: Slight Progress for Some but More Work to be Done

Welcome to the 2012 Sports, Fitness and Leisure Activity Topline Participation Report. We are dedicated to providing the most comprehensive look at physical activity in the USA. This report includes information on 119 sports and activities that are measured each year.

You may be unfamiliar with some of the terms used throughout the report. “Inactives” refers to those people who do not participate in any of the 119 sports and activities tracked. The term “core participant” refers to those people who participate on a regular basis.

68.1 Million Americans are Totally Inactive

In 2011, the number of inactive Americans ages six and older increased to more than 68 million, and the inactivity rate rose to almost 24 percent. Inactivity rates among children ages six to 12 fell slightly from 4.6 million people in 2010 to 4.5 million people in 2011. Activity rates among adolescents ages 13 to 17 remained fairly flat. Unfortunately, inactivity among adults continued to rise. Among adults ages 18 and older, inactivity increased from 58.7 million in 2010 to 60 million in 2011.

Over the past three years, the rate of inactivity has increased by just over eight percent, outpacing growth of the US population ages six and older. Although the growth in inactivity from 2010 to 2011 is modest when compared to past years, it is clear that we must keep working to inspire Americans to become more physically active.

217 Million Active Americans

While we spend a great deal of time talking about inactives in this report, there are currently 217 million active Americans ages six and older who take part in at least one sport or activity measured. To learn more about active Americans, contact the individual members of the PAC for data about their respective sports and activities.

Active Americans More Likely to Vote

For the first time in this survey, Americans were asked about their intentions to vote in the upcoming presidential election. There is a direct correlation between peoples’ plans to vote and their activity level. Those who are physically active are clearly more inclined to vote. See page 22 for more information.

The following are highlights from the 2012 Participation Topline Report:

- Participation in outdoor sports, like camping and hiking, saw the only increase in overall participation, regaining the two percentage points it lost in 2010.
- Fitness sports remained the most popular physical activity. The participation rate held steady at 60 percent — for the fourth year in a row. Fitness activities, like yoga, boot camp-style training and other classes, continue to drive this set of activities.
- Core participation in racquet sports gained one percentage point.
- Human-powered snowsports are up in the low single digits despite a decline in motorized snow and winter activities.
- Most states have an inactivity rate of over 18.8 percent. Inactivity tends to be higher in the southern U.S., while more active populations are usually located in northern and western states.
- The economy is still having a slight impact on sports and recreation spending. While many active Americans are still not spending money on sports and recreation, more people spent the same amount or increased spending, rather than spending less. It is encouraging that people plan to increase spending in 2012, rather than decrease spending.
- There are significant opportunities to engage inactive populations in swimming, working out with weights and working out using machines. Swimming ranks as a popular “aspirational sport” for inactives ages six to 12 and ages 45 and up. Working out with weights and working out using machines are the top “aspirational sports” for inactives ages 13 to 44.
The 2012 Participation Topline Report is brought to you by

About SGMA Research
SGMA Research, powered by Sports Marketing Surveys USA (SMS) is the sole provider of 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.

Sports Marketing Surveys USA has been in business since 1985, providing quantitative and qualitative marketing research and information for many of the leading manufacturers and organizations throughout the industry.

- Quantitative and Qualitative Consumer Research
- Dealer Studies
- Market Trend Analysis
- Sponsorship Evaluation
- Market Size Evaluations
- New Product Feasibility Studies

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