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METHODOLOGY

Unless otherwise indicated, all data is from a national online survey conducted for a consortium of trade associations and governing bodies by Sports Marketing Surveys. A panel of 19,240 derived from 7,528 individuals and 11,712 households were surveyed during January and February of 2014.

Participation Frequency: Participants in each activity are grouped into two categories: total participants and core. Core participation consists of those defined as frequent and regular. We focus on core participants because this group contains people most likely to buy equipment and services. These individuals have also shown a tendency to pay user fees related to their chosen sport or activity. The number of participation days used to define a regular or frequent participant varies according to the activity and is determined by a statistical process. For example, it takes 100 days of participation for an individual to be categorized as a frequent participant in fitness activities. For 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 are available in the SFIA Single Sport Reports or as part of a custom report from SFIA Research.

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, purchase intentions, and depth of commitment to a given activity.

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. As a general rule, larger sample sizes provide greater accuracy. For an example, sports with about 14 million participants have a standard error of plus or minus 2.9% of participants and those with 2.7 million or fewer participants have a standard error of plus or minus 6.7%. Therefore, caution should be used in dealing with data on smaller sports, especially those with 1 million or fewer participants. The questionnaire and methodology were developed by Sports Marketing Research, located in Jupiter, FL, under the cooperative sponsorship of the Sports and Fitness Industry Association (SFIA), the National Golf Foundation (NGF), the Outdoor Foundation (OF), Snow Sports Industries Association (SIA), International Health and Racquet Sports Association (IHRSA), Tennis Industry Association (TIA) and the United States Tennis Association (USTA.) Over-sampling of minority and specific ethnic groups took place to boost response from groups that typically under-respond to such surveys. Because the questionnaire and methodology have changed, readers should not make direct comparisons between this report and data collected prior to 2007. However, we believe trend data continues to be beneficial to determine general trends.

A weighting technique was used to balance the data to reflect the total U.S. population ages six and above. The following variables were used: gender, age, income, household size, region, population density and panel join date. The total population figure used was 290,000 people ages six and older.
If you have specific questions regarding methodology or data points, please contact Sports Marketing Surveys USA:

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For more information about team sports and the sporting goods industry visit: www.sfia.org - Copyright © SFIA, October 2014
HOW TO READ THE DATA

**PARTICIPANTS**
Individual people (could be members of multiple teams). This is the number of people playing team sports.

**PARTICIPATION**
(Productant) x (Number of sports each participant plays). This is the count of players occupying a spot on a team (one participant could be a team member in multiple team sports).

**PARTICIPATION RATE**
Percentage of the general population that participates in a particular team sport.
EXECUTIVE SUMMARY

by Tom Cove
President/CEO
Sports and Fitness Industry Association

Team Sports participation has long been woven into the fabric of American life; nearly 62 million people in the United States played at least one Team Sport in 2013. Yet, overall Team Sports participation has declined by 9.4% since the economic recession took hold in 2008.

This year’s report takes stock of Team Sports’ health post-recession – have declining Team Sports participation and related spending been temporary, or do they reflect changes in participation habits for which we must account? As we present in the pages that follow, some sports have thrived during this period of economic turbulence. We look to those sports for inspiration, and to their leaders for innovation. For this report, we feature discussions with three industry leaders at the forefront of participation growth amongst both emerging and traditional sports. We caught up with Jason Goger, president of STX, to learn more about his company’s success in one of the fastest growing sports over the past six years. We also spoke with Amy Cleveland of San Diego Sol Basketball club and Chris Price of Xara Soccer to learn more about the innovative ways they have retained participants in traditional sports that have otherwise seen declines. We hope that you will see their viewpoints, along with the data and analysis presented in this report, as a launchpad to think more about how you are positioned for long-term and sustainable prosperity in our evolving industry.

The SFIA is committed to fostering the growth of Team Sports participation. We recently announced the advent of the SFIA Increase Participation Plan, the largest industry effort of its kind to date. We intend to get 1 million children active by 2020, which will help to ensure the long-term health of our industry and its participants. To do this, we will rely in part on high quality youth sports coaching to ensure that children have safe, positive Team Sports experiences. Youth sports coaches are valuable assets to our industry, especially those of whom played youth sports themselves in the past. In this report we explore the state of youth sports coaching, highlighting trends in who exactly is coaching which sports, and what types of skills and safety training coaches have.

In focusing on Team Sports’ growth and retractions over the past six years, we also continue last year’s emphasis on changes in casual vs. core participation. There has been a growing trend in adult sports league participation as people work to fit play into their busy schedules, and we provide key insights into this phenomenon.

We hope you enjoy - and can apply learning from - the 2014 U.S. Trends in Team Sports Report. We at SFIA view this report as an opportunity for assessment and anticipation of future growth. As always, we remain committed to providing you balanced, honest, and well-documented insights and analysis to help you and your business make decisions. We encourage you to let us know how we’re doing.