

The SGMA Report:

Sports Participation Topline Report

2004 Edition

(rev. 8/2004)

Statistical Highlights from
the Superstudy® of
Sports Participation



SGMA SPORTS PARTICIPATION TRENDS

U.S. Population, 6 years of age or older, at least once per year (thousands)

Released April 2004

^[1] Thirteen-year change ^[2] Ten-year change ^[3] Six-year change ^[4] Five-year change ^[5] Four-year change ^[6] Three-year change

^[7] Two-year change ^[8] 2003 figure is elevated due to change in category definition from "Pistol" to "Handgun."

Bold type face indicates statistically significant change at 95% confidence level

	1987	1993	1998	2001	2002	2003	1 Year % Change (2002-2003)	16 Year % Change (1987-2003)
	<u>Benchmark</u>	<u>1993</u>	<u>1998</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>		
<u>Fitness Activities</u>								
Aerobics (High Impact)	13,961	10,356	7,460	6,401	5,423	5,875	+8.3	-57.9
Aerobics (Low Impact)	11,888	13,418	12,774	10,026	9,286	8,813	-5.1	-25.9
Aerobics (Step)	n.a.	11,502	10,784	8,542	8,336	8,457	+1.5	-26.5 [2]
Aerobics (Net)	21,225	24,839	21,017	16,948	16,046	16,451	+2.5	-22.5
Other Exercise to Music	n.a.	n.a.	13,846	13,076	13,540	14,159	+4.6	+2.3 [4]
Aquatic Exercise	n.a.	n.a.	6,685	7,103	6,995	7,141	+2.1	+6.8 [4]
Calisthenics	n.a.	n.a.	30,982	29,392	26,862	28,007	+4.3	-9.6 [4]
Cardio Kickboxing	n.a.	n.a.	n.a.	6,665	5,940	5,489	-7.6	-27.8 [5]
Fitness Bicycling	n.a.	n.a.	13,556	10,761	11,153	12,048	+8.0	-11.1 [4]
Fitness Walking	27,164	36,325	36,395	36,445	37,981	37,945	-0.1	+39.7
Running/Jogging	37,136	34,057	34,962	34,857	35,866	36,152	+0.8	-2.6
Fitness Swimming	16,912	17,485	15,258	15,300	14,542	15,899	+9.3	-6.0
Pilates Training	n.a.	n.a.	n.a.	2,437	4,671	9,469	+102.7	+444.5 [6]
Stretching	n.a.	n.a.	35,114	38,120	38,367	42,096	+9.7	+19.9 [4]
Yoga/Tai Chi	n.a.	n.a.	5,708	9,741	11,106	13,371	+20.4	+134.3 [4]
<u>Equipment Exercise</u>								
Barbells	n.a.	n.a.	21,263	23,030	24,812	25,645	+3.4	+20.6 [4]
Dumbbells	n.a.	n.a.	23,414	26,773	28,933	30,549	+5.6	+30.5 [4]
Hand Weights	n.a.	n.a.	23,325	27,086	28,453	29,720	+4.5	+27.4 [4]
Free Weights (Net)	22,553	28,564	41,266	45,407	48,261	51,567	+6.9	+128.6
Weight/Resistance Machines	15,261	19,446	22,519	25,942	27,848	29,996	+7.7	+96.6
Home Gym Exercise	3,905	6,258	7,577	8,497	8,924	9,260	+3.8	+137.1
Abdominal Machine/Device	n.a.	n.a.	16,534	18,692	17,370	17,364	0	+5.0 [4]
Rowing Machine Exercise	14,481	11,263	7,485	7,089	7,092	6,484	-8.6	-55.2
Stationary Cycling (Upright Bike)	n.a.	n.a.	20,744	17,483	17,403	17,488	+0.5	-15.7 [4]
Stationary Cycling (Spinning)	n.a.	n.a.	6,776	6,418	6,135	6,462	+5.3	-4.6 [4]
Stationary Cycling (Recumbent Bike)	n.a.	n.a.	6,773	8,654	10,217	10,683	+4.6	+57.7 [4]
Stationary Cycling (Net)	30,765	35,975	30,791	28,720	29,083	30,952	+6.4	+0.6
Treadmill Exercise	4,396	19,685	37,073	41,638	43,431	45,572	+4.9	+936.7
Stair-Climbing Machine Exercise	2,121	22,494	18,609	15,117	14,251	14,321	+0.5	+575.2
Aerobic Rider	n.a.	n.a.	5,868	3,918	3,654	2,955	-19.1	-49.6 [4]
Elliptical Motion Trainer	n.a.	n.a.	3,863	8,255	10,695	13,415	+25.4	+247.3 [4]
Cross-Country Ski Machine Exercise	n.a.	9,792	6,870	4,924	5,074	4,744	-6.5	-25.8 [1]
<u>Team Sports</u>								
Baseball	15,098	15,586	12,318	11,405	10,402	10,885	+4.6	-27.1
Basketball	35,737	42,138	42,417	38,663	36,584	35,439	-3.1	-0.8
Cheerleading	n.a.	3,257	3,266	3,844	3,596	3,574	-0.6	+17.6
Ice Hockey	2,393	3,204	2,915	2,344	2,612	2,789	+6.8	+16.5
Field Hockey	n.a.	n.a.	1,375	1,249	1,096	n.a.	n.a.	n.a.
Football (Touch)	20,292	21,241	17,382	16,675	14,903	14,119	-5.3	-30.4
Football (Tackle)	n.a.	n.a.	n.a.	5,400	5,783	5,751	-0.6	+16.6 [5]
Football (Net)	n.a.	n.a.	n.a.	19,199	18,703	17,958	-4.0	-4.1 [5]
Lacrosse	n.a.	n.a.	926	1,099	921	1,132	+22.9	+22.2 [4]
Rugby	n.a.	n.a.	546	573	n.a.	n.a.	n.a.	n.a.
Soccer (Indoor)	n.a.	n.a.	n.a.	n.a.	n.a.	4,563	n.a.	n.a.
Soccer (Outdoor)	n.a.	n.a.	n.a.	n.a.	n.a.	16,133	n.a.	n.a.
Soccer (Net)	15,388	16,365	18,176	19,042	17,641	17,679	+0.2	+14.9
Softball (Regular)	n.a.	n.a.	19,407	17,679	14,372	14,410	+0.3	-25.7 [4]
Softball (Fast-Pitch)	n.a.	n.a.	3,702	4,117	3,658	3,487	-4.7	-5.8 [4]
Softball (Net)	n.a.	n.a.	21,352	20,123	16,587	16,020	-3.4	-25.0 [4]
Volleyball (Hard Surface)	n.a.	n.a.	n.a.	12,802	11,748	11,008	-6.3	-14.0 [7]
Volleyball (Grass)	n.a.	n.a.	n.a.	10,330	8,621	7,953	-7.7	-23.0 [7]
Volleyball (Beach)	n.a.	13,509	10,572	7,791	7,516	7,454	-0.8	-35.5 [1]
Volleyball (Net)	35,984	37,757	26,637	24,123	21,488	20,286	-5.6	-43.6
<u>Racquet Sports</u>								
Badminton	14,793	11,908	9,936	7,684	6,765	5,937	-12.2	-59.9
Racquetball	10,395	7,412	5,853	5,296	4,840	4,875	+0.7	-53.1
Squash	n.a.	n.a.	289	n.a.	302	473	+56.6	n.a.
Tennis	21,147	19,346	16,937	15,098	16,353	17,325	+5.9	-18.1

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	Benchmark							
Personal Contact Sports								
Boxing	n.a.	n.a.	n.a.	932	908	945	+4.1	+4.5 [5]
Martial Arts	n.a.	n.a.	5,368	5,999	5,996	6,883	+14.8	+28.2 [4]
Wrestling	n.a.	n.a.	n.a.	2,360	2,026	1,820	-10.2	-28.5 [5]
Indoor Sports								
Billiards / Pool	35,297	40,254	39,654	39,263	39,527	40,726	+3.0	+15.4
Bowling	47,823	49,022	50,593	55,452	53,160	55,035	+3.5	+15.1
Darts	n.a.	n.a.	21,792	19,460	19,703	19,486	-1.1	-10.6 [4]
Table Tennis	n.a.	17,689	14,999	13,239	12,796	13,511	+5.6	-32.7 [1]
Wheel Sports								
Roller Hockey	n.a.	2,323	3,876	2,733	2,875	2,718	-5.5	+17.0 [2]
Roller Skating (2x2 Wheels)	n.a.	24,223	14,752	11,443	10,968	11,746	+7.1	-56.7 [1]
Roller Skating (Inline Wheels)	n.a.	13,689	32,010	26,022	21,572	19,233	-10.8	+309.6 [1]
Scooter Riding (Non-motorized)	n.a.	n.a.	n.a.	15,796	13,858	11,493	-17.1	-17.2 [6]
Skateboarding	10,888	5,388	7,190	12,459	12,997	11,090	-14.7	+1.9
Other Sports/Activities								
Bicycling (BMX)	n.a.	n.a.	n.a.	3,668	3,885	3,365	-13.4	-9.8 [5]
Bicycling (Recreational)	n.a.	n.a.	54,575	52,948	53,524	53,710	+0.3	-1.6 [4]
Golf	26,261	28,610	29,961	29,382	27,812	27,314	-1.8	+4.0 [4]
Gymnastics	n.a.	n.a.	6,224	5,557	5,149	5,189	+0.8	-16.6 [4]
Swimming (Recreational)	n.a.	n.a.	94,371	93,571	92,667	96,429	+4.1	+2.2 [4]
Walking (Recreational)	n.a.	n.a.	80,864	84,182	84,986	88,799	+4.5	+9.8 [4]
Outdoors Activities								
Camping (Tent)	35,232	34,772	42,677	43,472	40,316	41,891	+3.9	+18.9
Camping (Recreational Vehicle)	22,655	22,187	18,188	19,117	18,747	19,022	+1.5	-16.0
Camping (Net)	50,386	49,858	50,650	52,929	49,808	51,007	+2.4	+1.2
Hiking (Day)	n.a.	n.a.	38,629	36,915	36,778	39,096	+6.3	+1.2 [4]
Hiking (Overnight)	n.a.	n.a.	6,821	6,007	5,839	6,213	+6.4	-8.9 [4]
Hiking (Net)	n.a.	n.a.	40,117	37,999	37,888	40,409	+6.7	+0.7 [4]
Horseback Riding	n.a.	n.a.	16,522	16,648	14,641	16,009	+9.3	-3.1 [4]
Mountain Biking	1,512	7,408	8,611	6,189	6,719	6,940	+3.3	+359.0
Mountain/Rock Climbing	n.a.	n.a.	2,004	1,819	2,089	2,169	+3.8	+8.2 [4]
Artificial Wall Climbing	n.a.	n.a.	4,696	7,377	7,185	8,634	+20.2	+83.9 [4]
Trail Running	n.a.	n.a.	5,249	5,773	5,625	6,109	+8.6	+16.4 [4]
Shooting Sports								
Archery	8,558	8,648	7,109	6,442	6,650	7,111	+6.9	-16.9
Hunting (Shotgun/Rifle)	25,241	23,189	16,684	16,672	16,471	15,232	-7.5	-39.7
Hunting (Bow)	n.a.	n.a.	4,719	4,435	4,752	4,155	-12.6	-12.0 [4]
Paintball	n.a.	n.a.	5,923	7,678	8,679	9,835	+13.3	+66.0 [4]
Shooting (Sport Clays)	n.a.	3,100	2,734	3,324	3,017	3,867	+28.2	+31.9 [1]
Shooting (Trap/Skeet)	5,073	n.a.	3,800	3,904	3,696	4,496	+21.6	-11.4
Target Shooting (Rifle)	n.a.	n.a.	14,042	13,979	14,336	15,176	+5.9	+8.1 [4]
Target Shooting (Handgun) ^[8]	n.a.	n.a.	12,110	11,402	11,064	13,836	+25.1	+14.3 [4]
Target Shooting (Net) ^[8]	18,947	23,498	18,330	17,838	17,558	19,788	+12.7	+4.4
Fishing								
Fishing (Fly)	11,359	6,598	7,269	5,999	6,034	6,033	0	-46.9
Fishing (Freshwater-Other)	50,500	50,198	45,807	43,547	42,605	43,819	+2.8	-13.2
Fishing (Saltwater)	19,646	18,490	15,671	13,871	14,874	15,221	+2.3	-22.5
Fishing (Net)	58,402	55,442	55,488	53,137	51,426	52,970	+3.0	-9.3
Winter Sports								
Ice Skating	n.a.	n.a.	18,710	16,753	14,530	17,049	+17.3	-8.9 [4]
Skiing (Cross-Country)	8,344	6,489	4,728	4,123	4,080	4,171	+2.2	-50.0
Skiing (Downhill)	17,676	17,567	14,836	13,202	14,249	13,633	-4.3	-22.9
Snowboarding	n.a.	2,567	5,461	6,797	7,691	7,818	+1.7	+269.5 [1]
Snowmobiling	n.a.	n.a.	6,492	6,451	4,515	5,509	+22.0	-15.1 [4]
Snowshoeing	n.a.	n.a.	1,721	2,042	2,006	2,479	+23.6	+44.0 [4]

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	1987						1 Year % Change	16 Year % Change
	Benchmark	1993	1998	2001	2002	2003	(2002-2003)	(1987-2003)
Water Sports								
Boardsailing/Windsurfing	1,145	835	1,075	537	496	779	+57.1	-32.0
Canoeing	n.a.	n.a.	13,615	12,044	10,933	11,632	+6.4	-14.6 [4]
Kayaking	n.a.	n.a.	3,501	4,727	5,562	6,324	+13.7	+80.6 [4]
Rafting	n.a.	n.a.	5,570	4,580	4,431	4,553	+2.8	-18.3 [4]
Jet Skiing	n.a.	n.a.	11,203	10,593	9,806	10,648	+8.6	-5.0 [4]
Sailing	6,368	3,918	5,902	5,230	5,161	5,232	+1.4	-17.8
Scuba Diving	2,433	2,306	3,448	2,744	3,328	3,215	-3.4	+32.1
Snorkeling	n.a.	n.a.	10,575	9,788	9,865	10,179	+3.2	-3.7 [4]
Surfing	1,459	n.a.	1,395	1,601	1,879	2,087	+11.1	+43.0
Wakeboarding	n.a.	n.a.	2,253	3,097	3,142	3,356	+6.8	+49.0 [4]
Water Skiing	19,902	16,626	10,161	8,301	8,204	8,425	+2.7	-57.7

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About This Report

When it comes to analyzing the size of sports product markets, participation figures form the most crucial data. While they may complement consumer, point-of-sale and retail trade studies, participation data are more important in defining the size of a market.

For example, during the 1990s, there were mammoth gains in golf product sales and industry stock prices, which contradicted participation tracking research that showed golf enjoyed only modest growth in that decade. A closer inspection revealed that the growth of golf companies was based on increasingly expensive new products that prompted multiple 'discretionary' purchases from the existing participant base. The reality: the growth of golf participation was unremarkable.

For such reasons, sports participation defines the size, composition, and ultimately the trend of the product market. It is, in effect, the 'gold standard' to which all markets eventually return.

This report is based on the Superstudy® of sports participation conducted by American Sports Data, Inc. in January 2004, monitoring an

unprecedented 103 sports and fitness activities.

Current year data (calendar 2003) are based on a nationally representative sample of children and adults age 6+, drawn from the consumer mail panel of NFO Worldwide, the largest mail panel research company in the world, with a U.S. panel comprised of 500,000 households.

During the period January 5-6, 2004, four-page self-administered questionnaire booklets were mailed to 25,000 NFO households across the county. Only one individual in each household was targeted as a respondent, thus enhancing the quality of the data collected.

At the conclusion of the fieldwork, 15,495 questionnaires had been returned for a response rate of 62%. A total of 15,015 usable questionnaires comprised the final sample, which was balanced to reflect the latest U.S. Census parameters of Age within Gender, Race, Household Income and Geographic Region. The weighted data were then projected to the U.S. population of 260,382,000, so each respondent in the study represents 17,341 people.

About SGMA

When six equipment manufacturers met in 1906 to found the Sporting Goods Manufacturers Association, their goal was simple: "To create better feeling and good fellowship among the manufacturers."

Ever since those early days, the association has been involved in serving the sporting goods industry, whether it's by conducting valuable, in-depth research, organizing trade show, lobbying on the industry's behalf in Congress or serving as a catalyst to stimulate market growth, getting more people to participate in sports.

As our trade group has evolved, so has our mission: "To represent and support members

through programs and strategies for sports participation, market intelligence, public policy and The Super Show®." And as our reputation for integrity has spread, so has our ability to serve as valued liaison between manufacturers and amateur sports.

SGMA continues to actively foster the industry's health and growth by promoting collective action and taking a leadership role. Sports and fitness manufacturers, suppliers, reps and others interested in sport, fitness and recreation are welcome to partner with us in securing a future that both promotes and protects the business of sport.



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