

The logo for Kinética, featuring the word "KINETICA" in a bold, sans-serif font. The letter "K" is unique, with the top horizontal bar slanted to the right and the bottom vertical stroke ending in a diagonal line pointing up and to the right. The entire logo is set against a dark blue rectangular background that is centered horizontally and covers the middle third of the slide.

KINETICA

DOCUMENT: U.S. Sports & Recreation Consumer Economy Spotlight – July 2025

mal@thekineticagroup.com



Kinetica's National Sport, Recreation and Wellbeing survey - method

Our proprietary survey provides a valuable platform for tracking and understanding of sport, recreation and wellbeing behaviors, attitudes and demographics of US residents. We launched the survey in July 2023, the method employed is summarised below:

Method

- Nationally representative sample of adults aged 16+, kids data captured via parents
- Sample sourced via panel provider
- 20,000 surveys per year
- 20-minute survey
- Conducted online and in-field continuously

Participation data (50+ activities)

- Participation adults & children:- past 5 years, past 12 months & past month
- Frequency of play
- Likelihood to continue
- Place/ location of play
- Whether a member of a local club
- \$ annual participation spend by category
- Junior program awareness and participation
- Interest in playing (non-past 12 months participants – any interest, most interest)

Tennis fandom data (50+ activities)

- Fandom adults and children
- Sports followed
- Sports passion
- Sports competition watching and attendance – any and frequency
- \$ annual fandom spend by category
- Interest in watching / attending sports competitions (amongst non current watcher/ attendees)

Other data

- Health & wellbeing indicators
- Leisure activities
- Psychographics
- Demographics

This deck presents a snapshot of data collected on spend on participating in the sport amongst kids aged 5-15. The data comes from the period May '24 to March '25



Sports consumer spend data capture - method

The data capture and analysis approach we employ is summarised below:

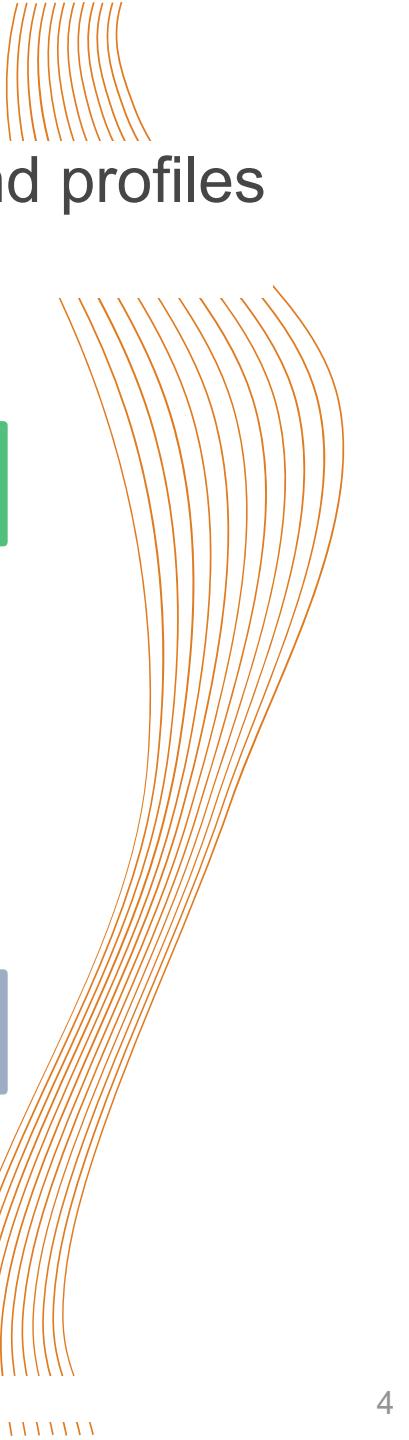
Question

Q4.17. Please indicate how much you spent on behalf of your (INSERT GENDER) child aged (INSERT AGE) over the past 12 months on participating in each of the sport and recreation activities shown in the table below. Please enter a total number of \$ spent for each category shown, if you didn't spend anything for a specific category just type in \$0. Just think about and enter an approximate amounts.

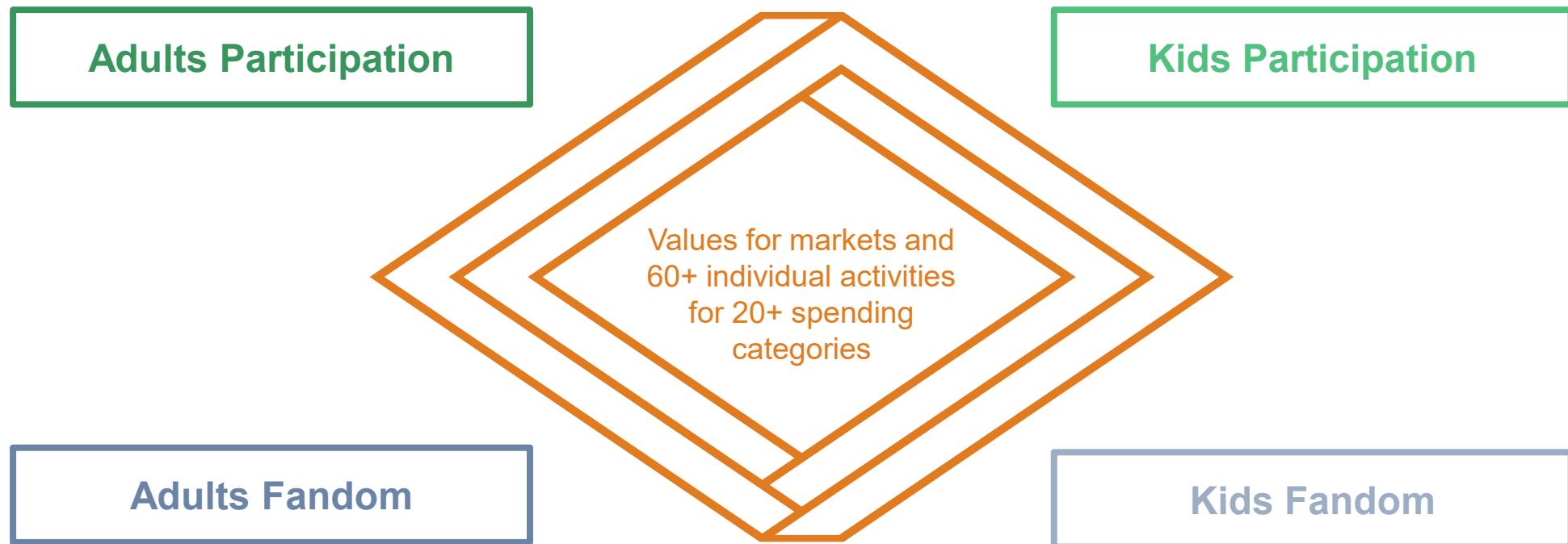
Sports club/ membership	
Fees to play/ participate excluding membership	
Apparel/ Kit/ Uniforms	
Footwear (Sneakers, Boots etc)	
Equipment / accessories	
Competition fees	
Subscriptions to sport media/ publications	
Sport participation programs	
Coaching/ Skill Development	
Mass Participation events	
Participation experiences whilst on holiday, travelling	
Sports technology (e.g. devices, virtual platforms, power meters)	
Other (Please specify)	
Total	

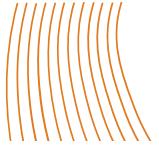
Analysis

1. Removal of any flatliners/ poor quality responses
2. Capping of responses to reduce impact of outliers – responses capped at \$5,000 for all sports bar a selection with consistently higher values capped at \$10,000 e.g. Golf
3. Market values calculated using % incidence rates from the Kinetica survey to generate population sizes per sport. Then applying per capita averages to the population participation base for each sport
4. Further analysis then conducted on categories of spend, demographics and deep-dives into each sport
5. Kinetica will localize the spend data to provide consumer spending values for every single community at an overall level and by individual sports

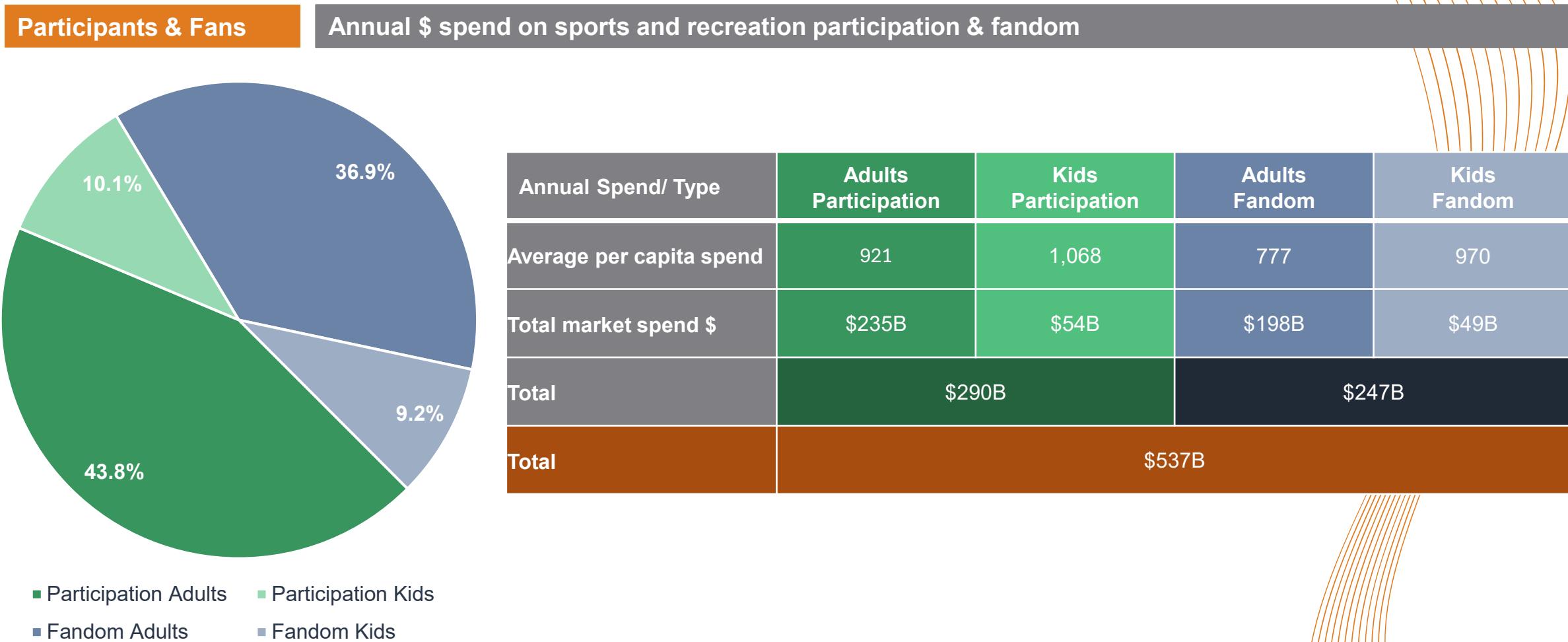


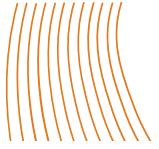
Kinetica has collected over 35,000 individual sports and recreation spend profiles to deliver a detailed breakdown of consumer spending



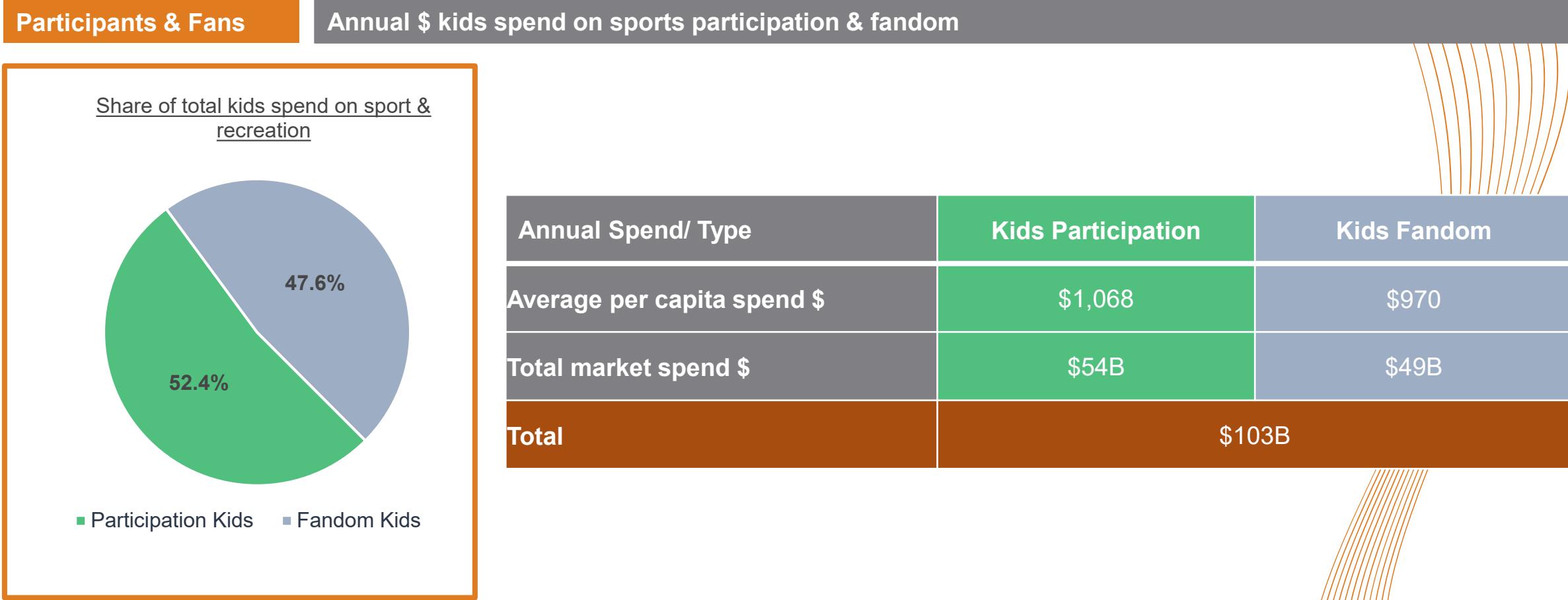


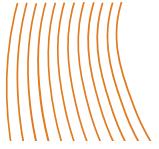
Our data reveals that \$537B is spent annually on sports and recreation participation in the U.S. across participation and fandom



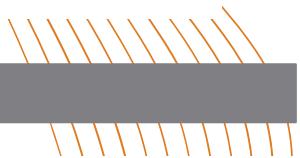


Our data reveals that \$54B is spent annually on Kids sports and recreation participation in the U.S.





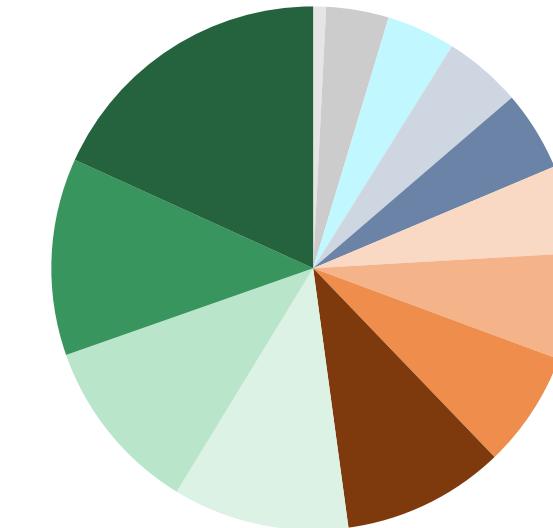
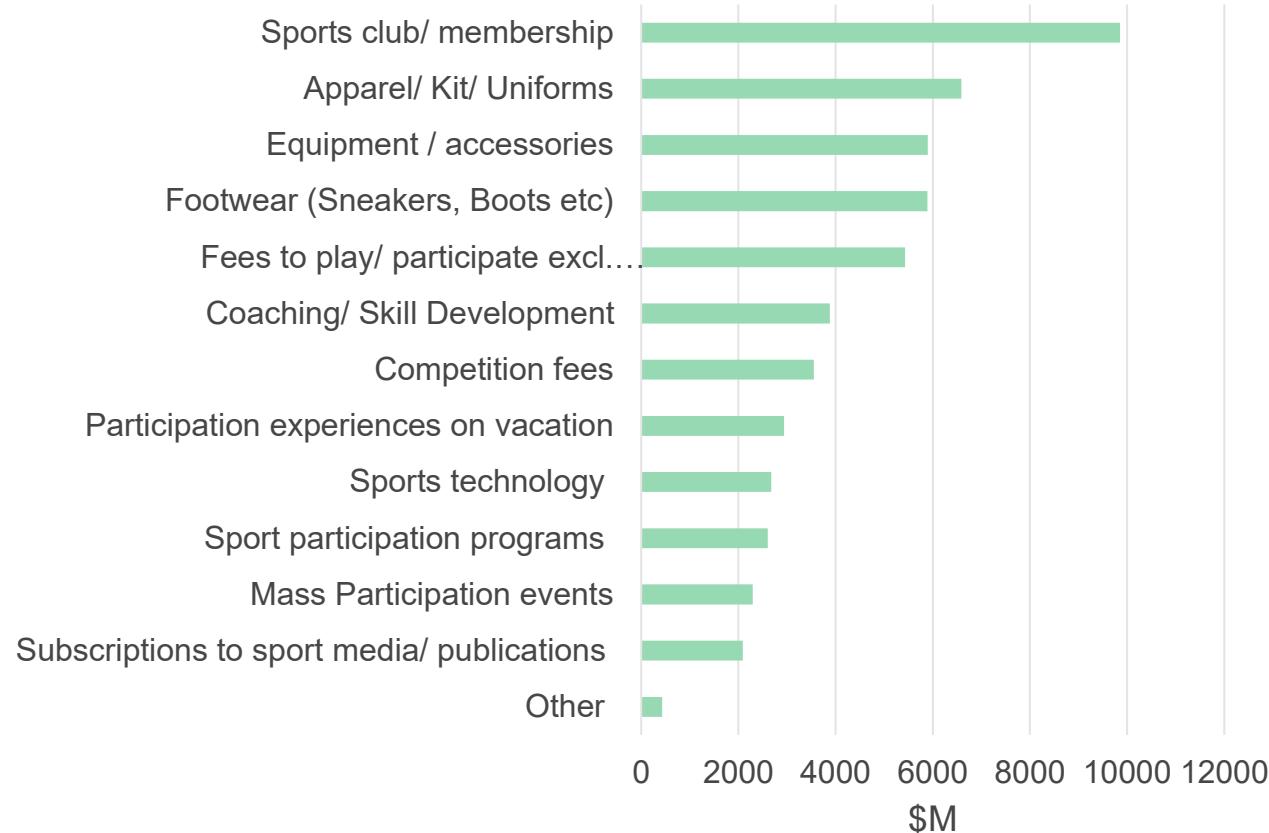
60% of all kids spending on sports and recreation participation activities is accounted for by memberships/ fees, uniforms, equipment and footwear



1

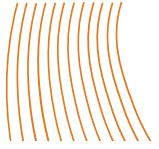
Past 12 Month Participants - Kids

Total Annual Spend & Share of Market by spend category

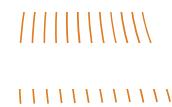
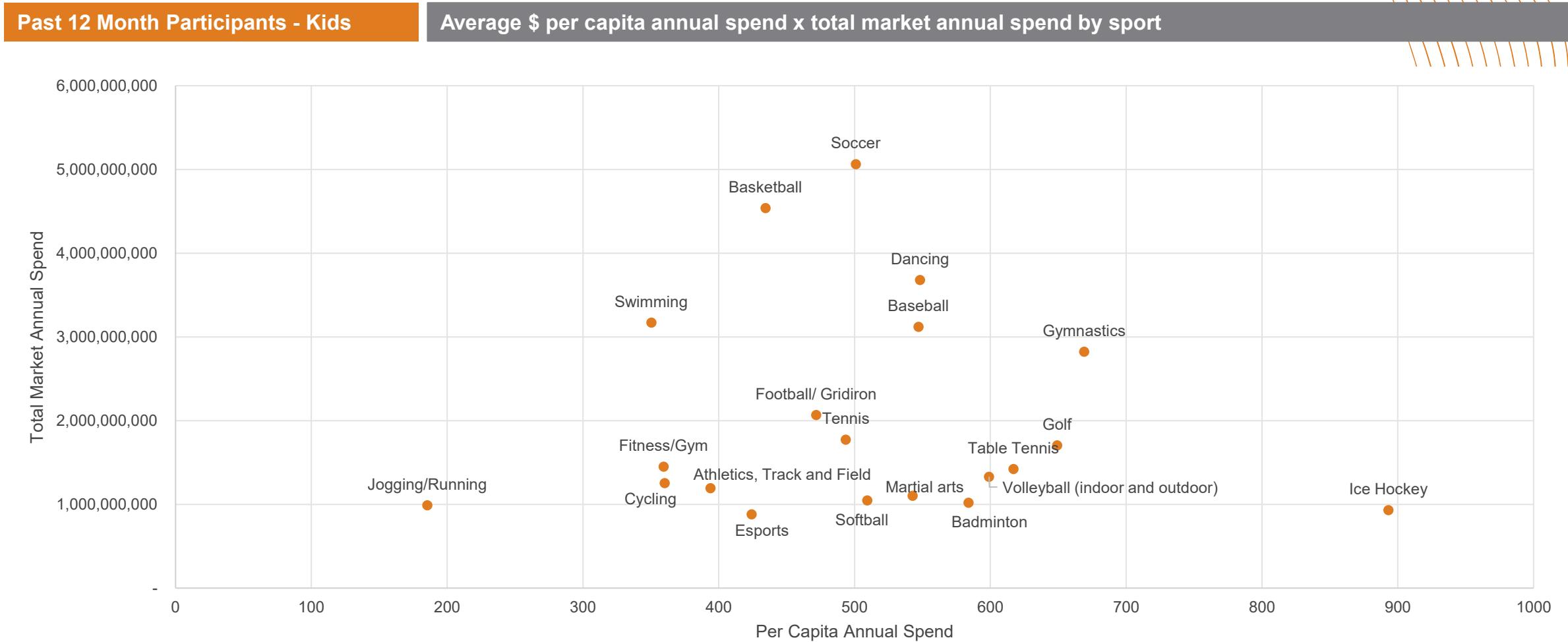


- Other
- Subscriptions to sport media/ publications
- Mass Participation events
- Sport participation programs
- Sports technology
- Participation experiences on vacation
- Competition fees
- Coaching/ Skill Development
- Fees to play/ participate excl. membership
- Footwear (Sneakers, Boots etc)
- Equipment / accessories
- Apparel/ Kit/ Uniforms
- Sports club/ membership



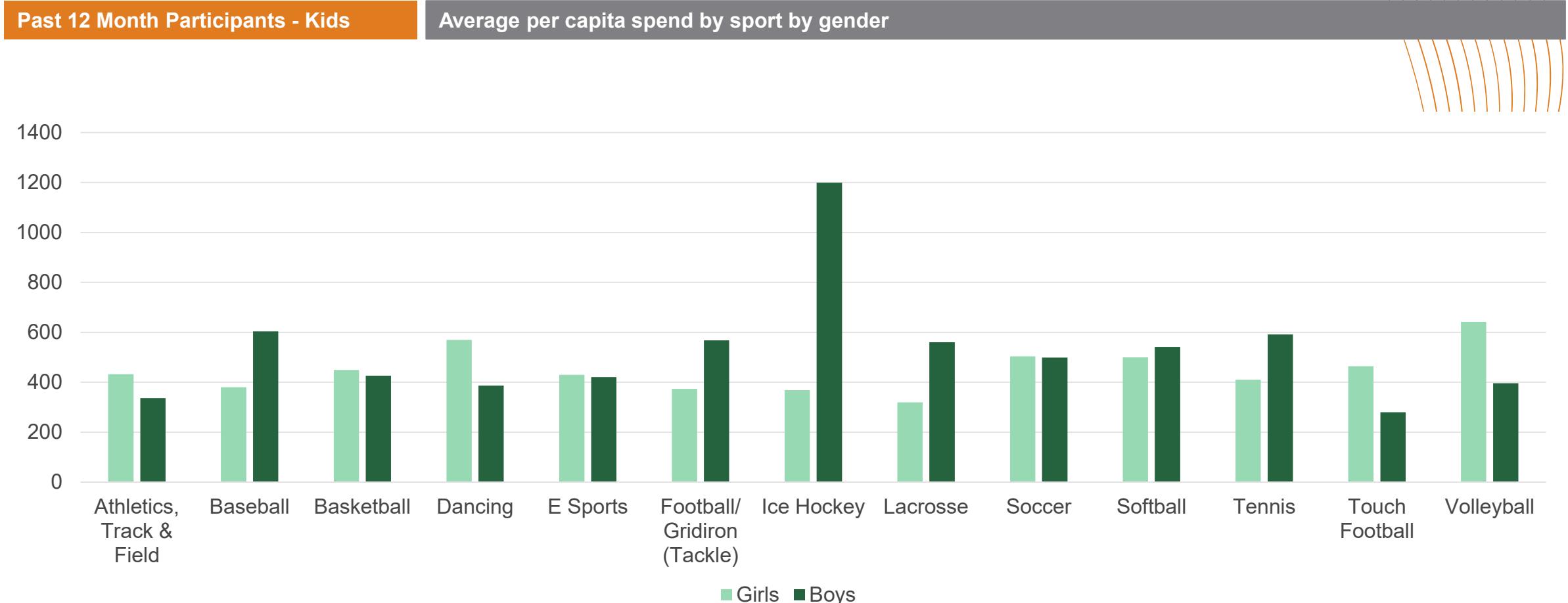


20 sports account for 75% of all kids spending on sports and recreation participation activities



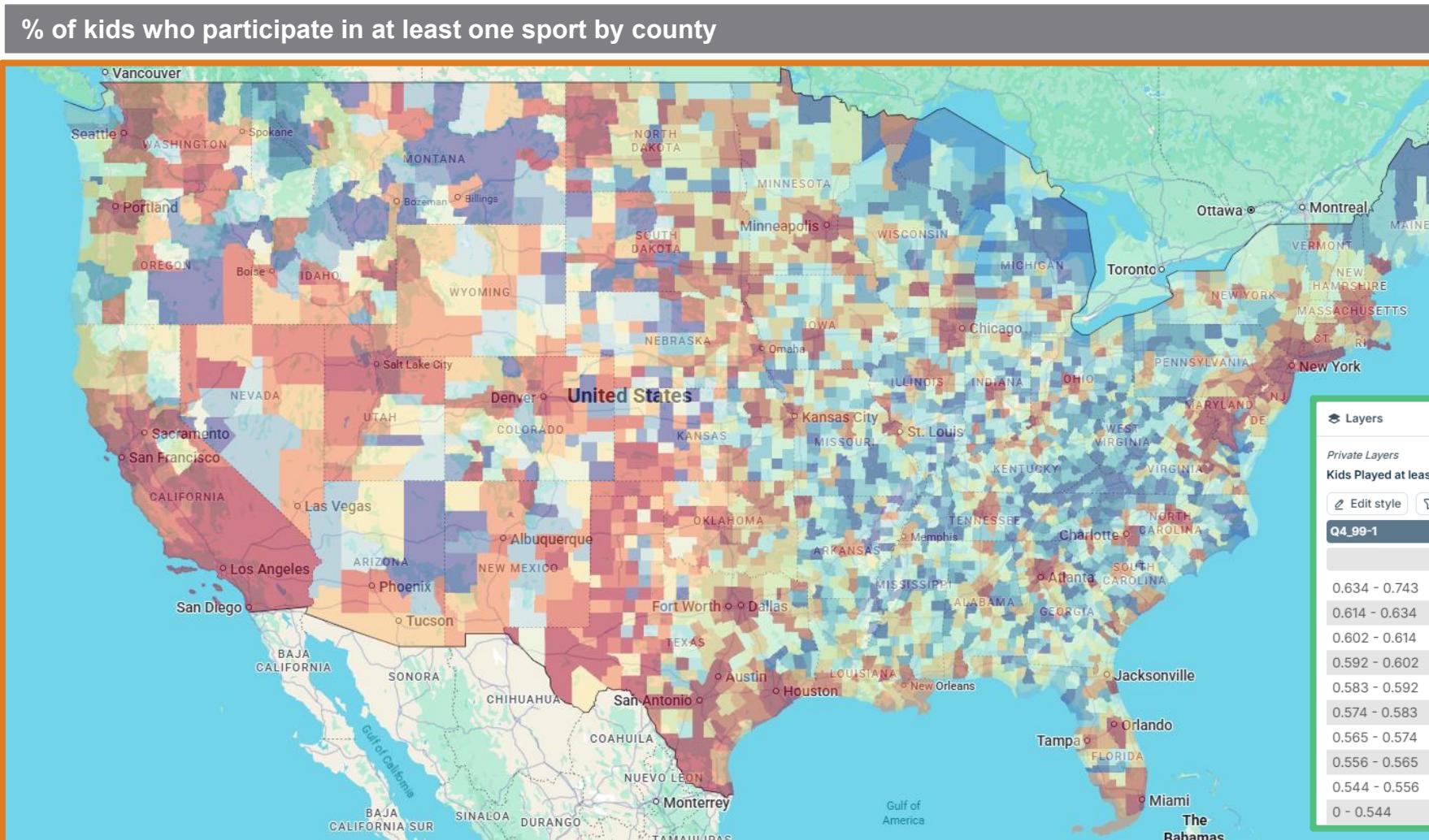


For many sports the per capita spend is relatively similar for both girls and boys



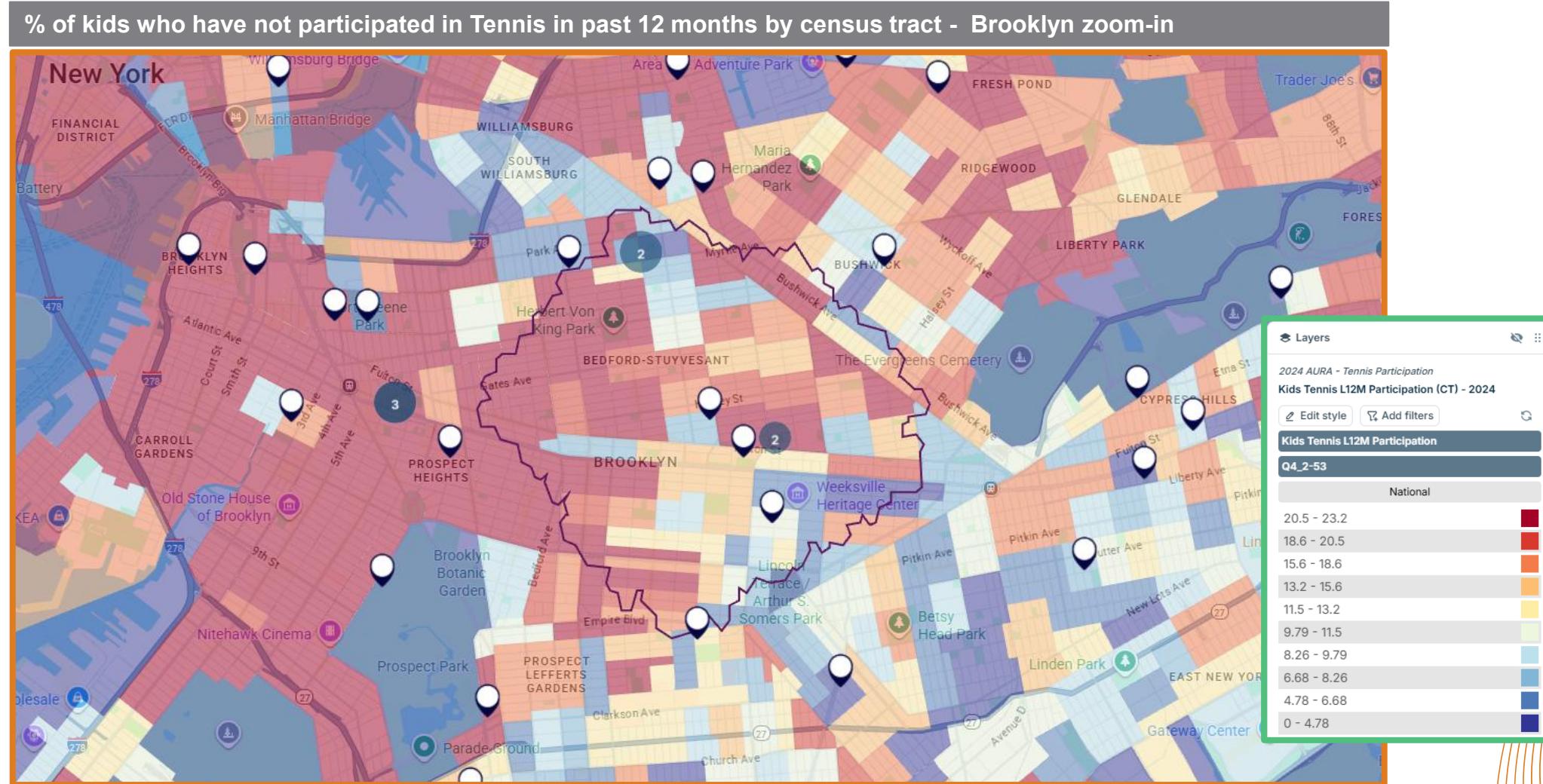


The TAM for youth sports varies significantly across the U.S.



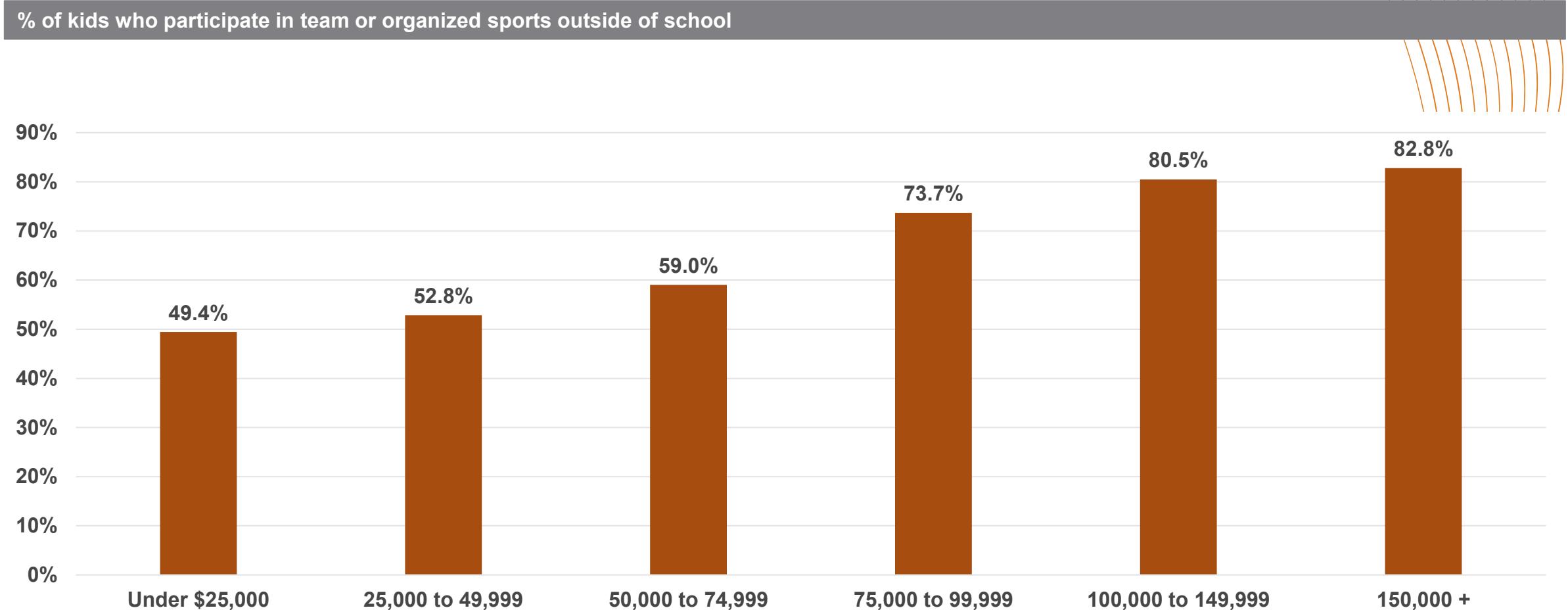


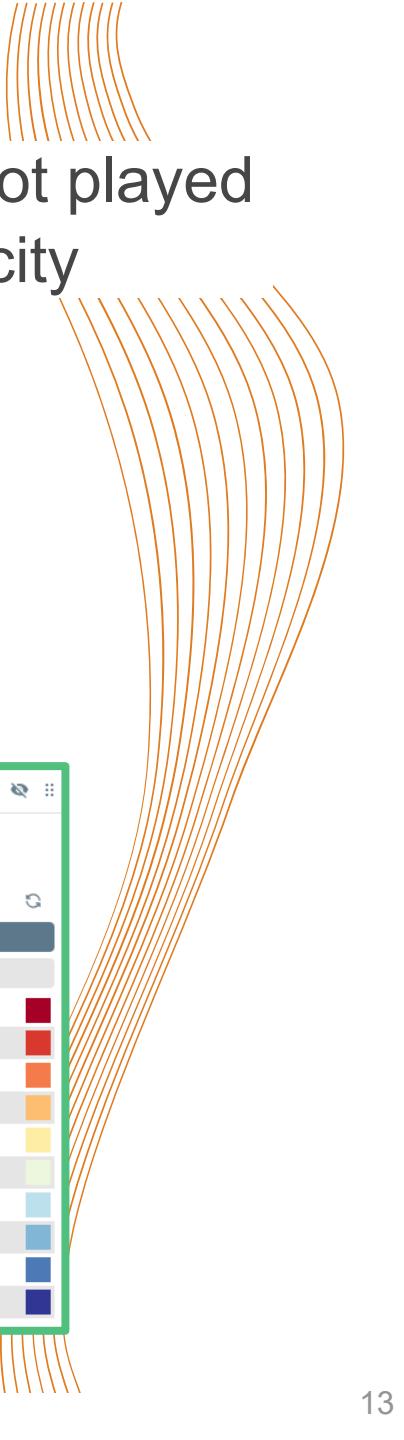
Localized data enables market sizing and targeting opportunities for operators in the youth sports sector for every community across the U.S.



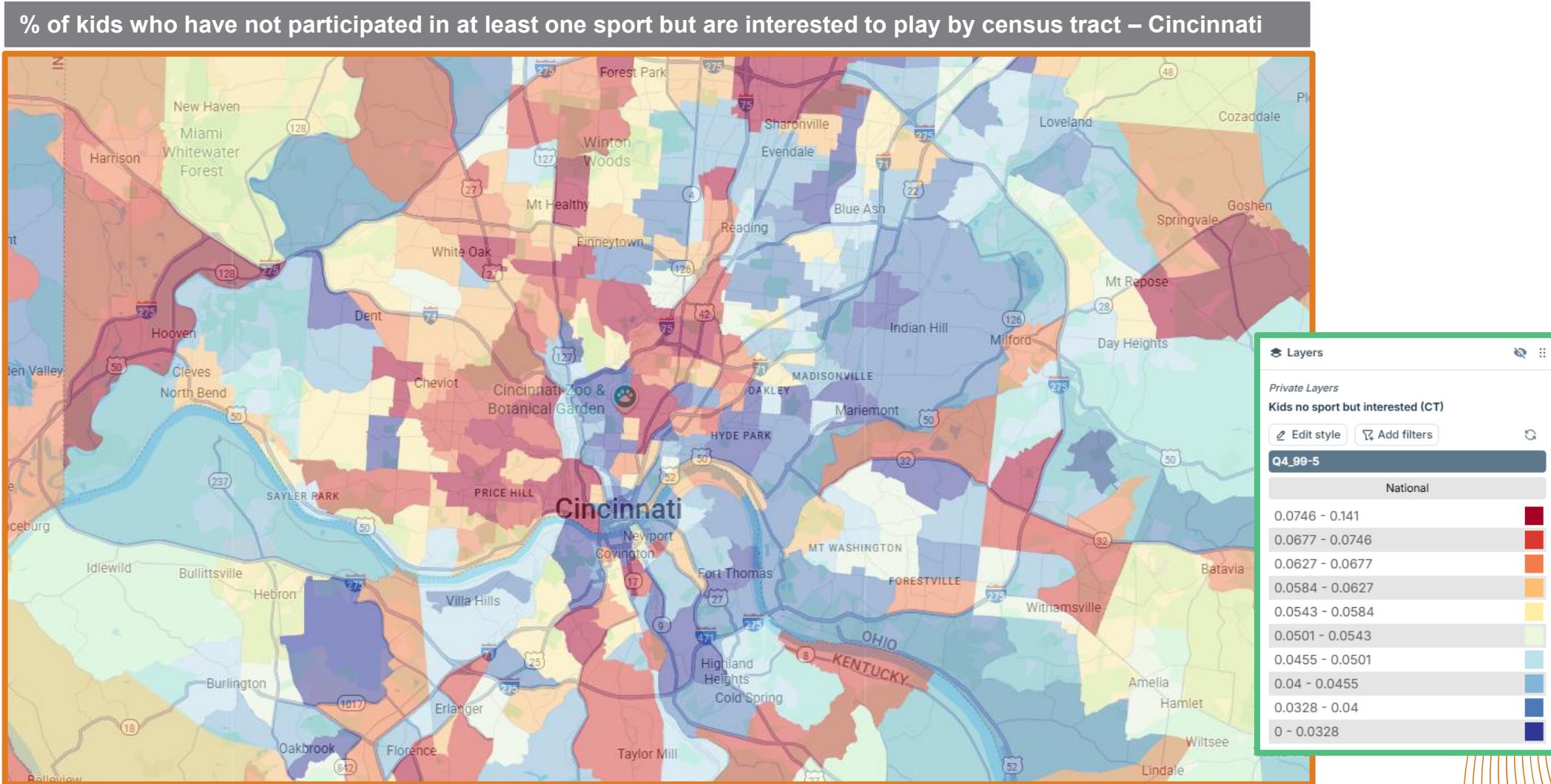


4 in 5 kids from the highest income households participate in sports outside of school compared to only 1 in 2 of kids from lowest income households





Diving into Cincinnati we can see that the proportion of kids who have not played any sports in last 12 months but want to peaks in northern areas of the city



KINETICA
