



KINETICA

The logo features the word "KINETICA" in a light blue, sans-serif font. The letter "K" is stylized with an orange diagonal line through it. The logo is positioned on the left side of a dark blue horizontal band that spans the width of the slide.

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	Participation data (50+ activities)	Tennis fandom data (50+ activities)	Other data
<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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.

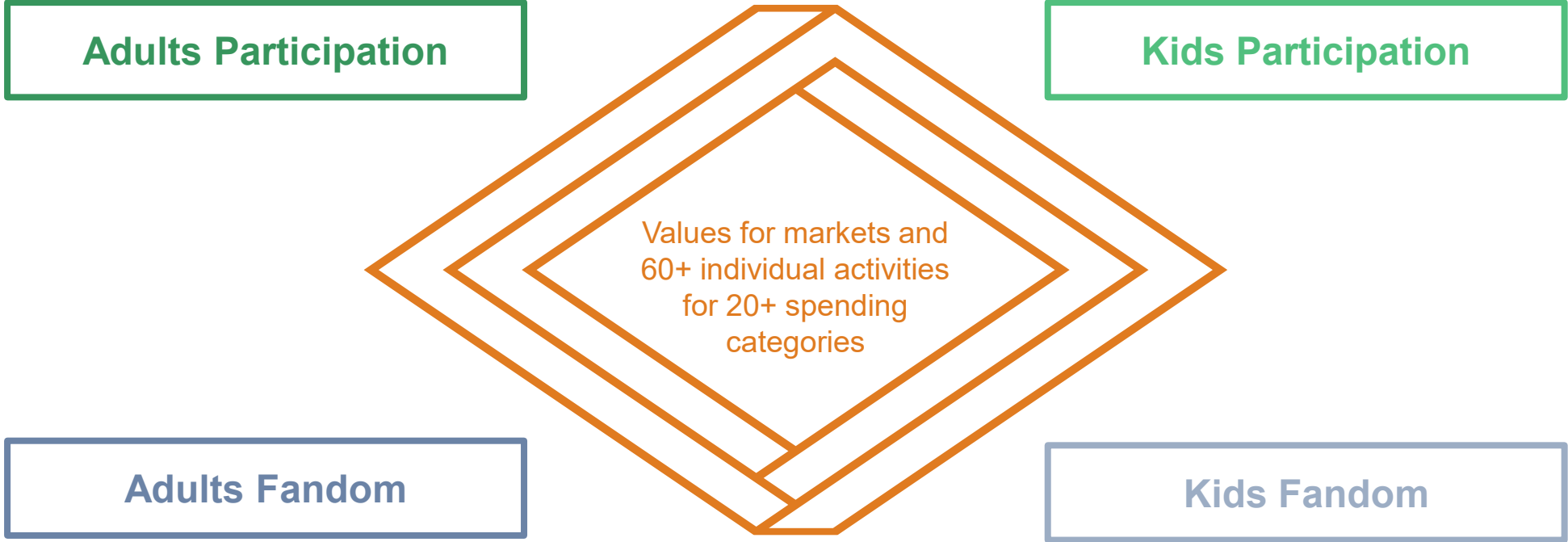
Sports club/ membership	
Fees to play/ participate excluding membership	
Apparel/ Kit/ Uniforms	
Footwear (Sneakers, Boots etc)	
Equipment / accessories	
Competition fees	
Subscriptions to sport media/ publications	
Sport participation programs	
Coaching/ Skill Development	
Mass Participation events	
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

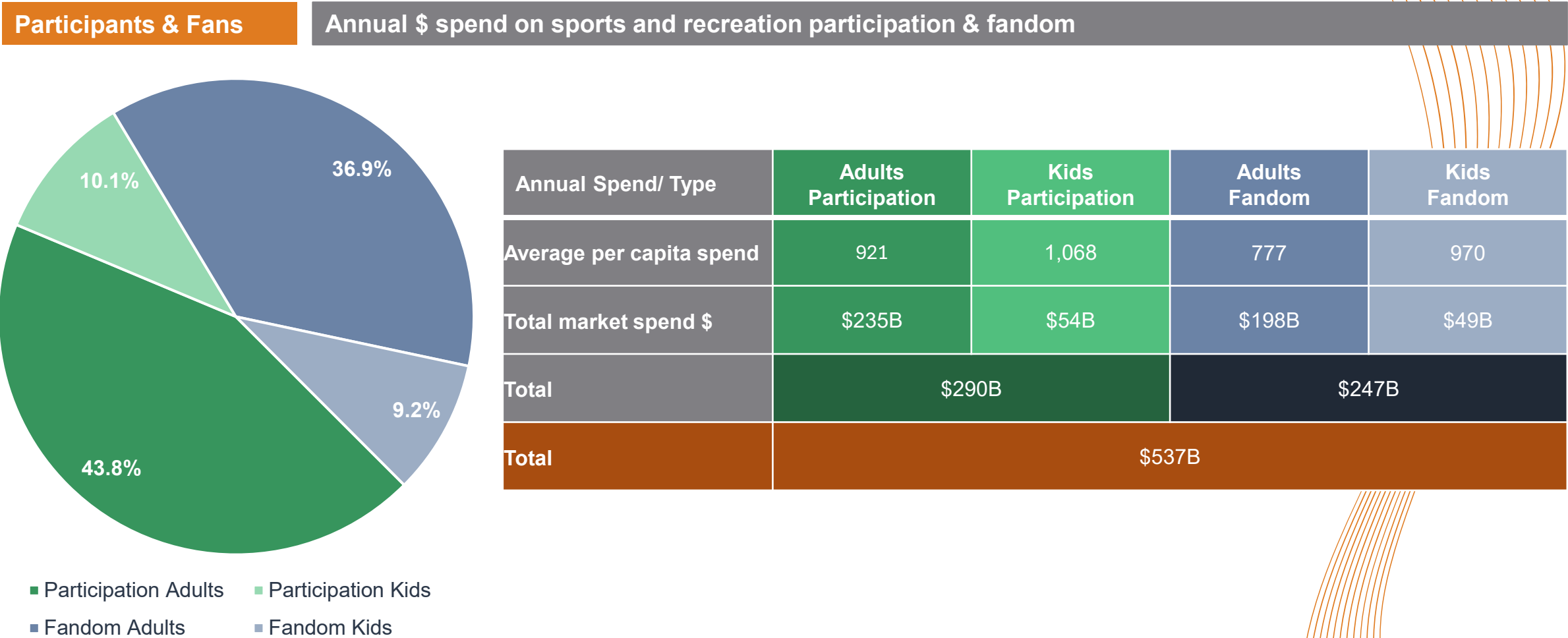


Kinetica has collected over 35,000 individual sports and recreation spend profiles to deliver a detailed breakdown of consumer spending





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

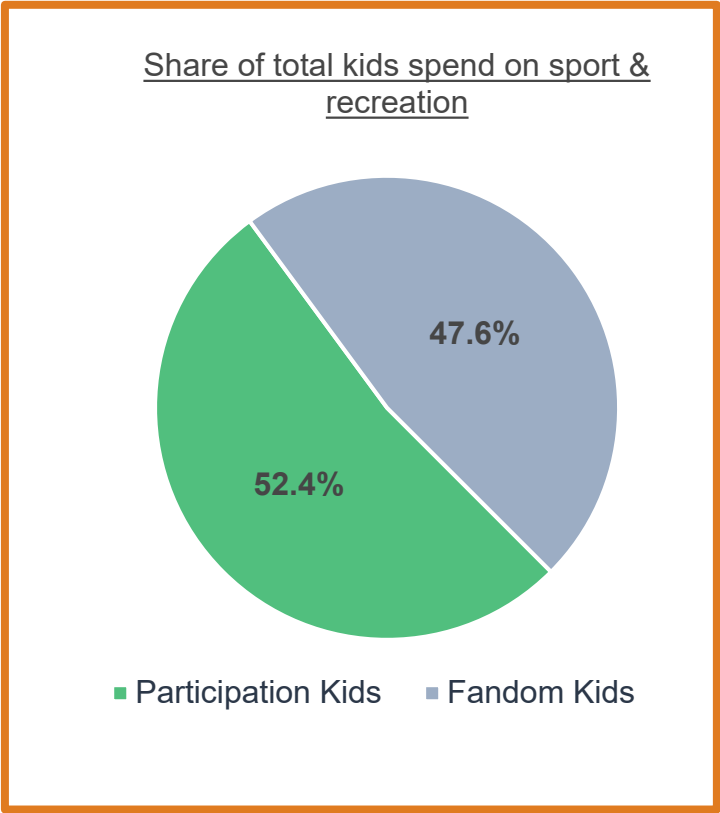




Our data reveals that \$54B is spent annually on Kids sports and recreation participation in the U.S.

Participants & Fans

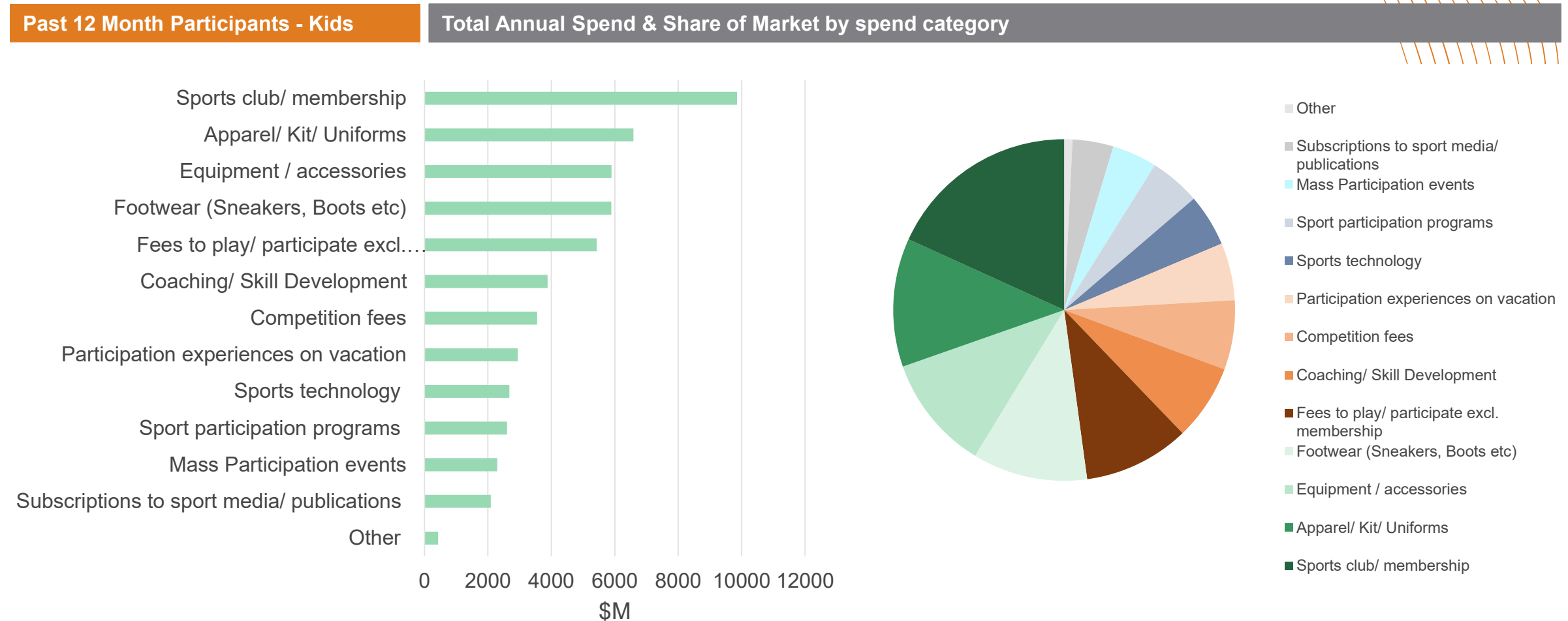
Annual \$ kids spend on sports participation & fandom



Annual Spend/ Type	Kids Participation	Kids Fandom
Average per capita spend \$	\$1,068	\$970
Total market spend \$	\$54B	\$49B
Total	\$103B	



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

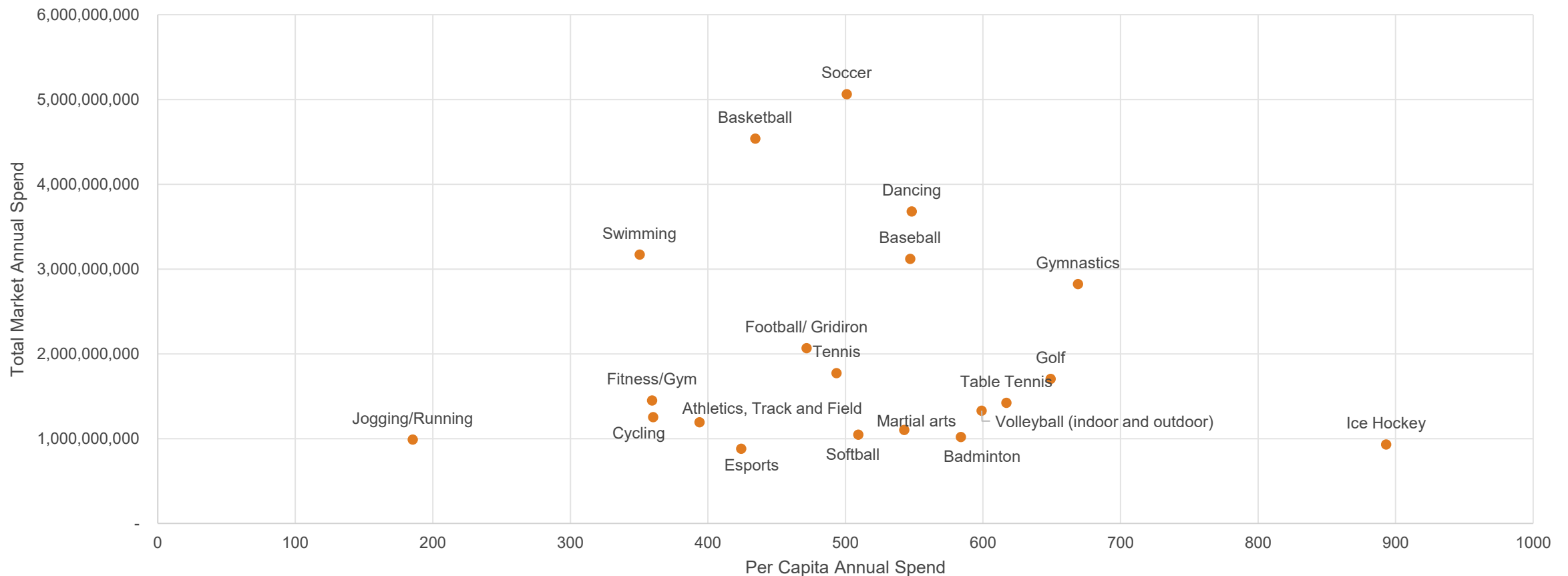




20 sports account for 75% of all kids spending on sports and recreation participation activities

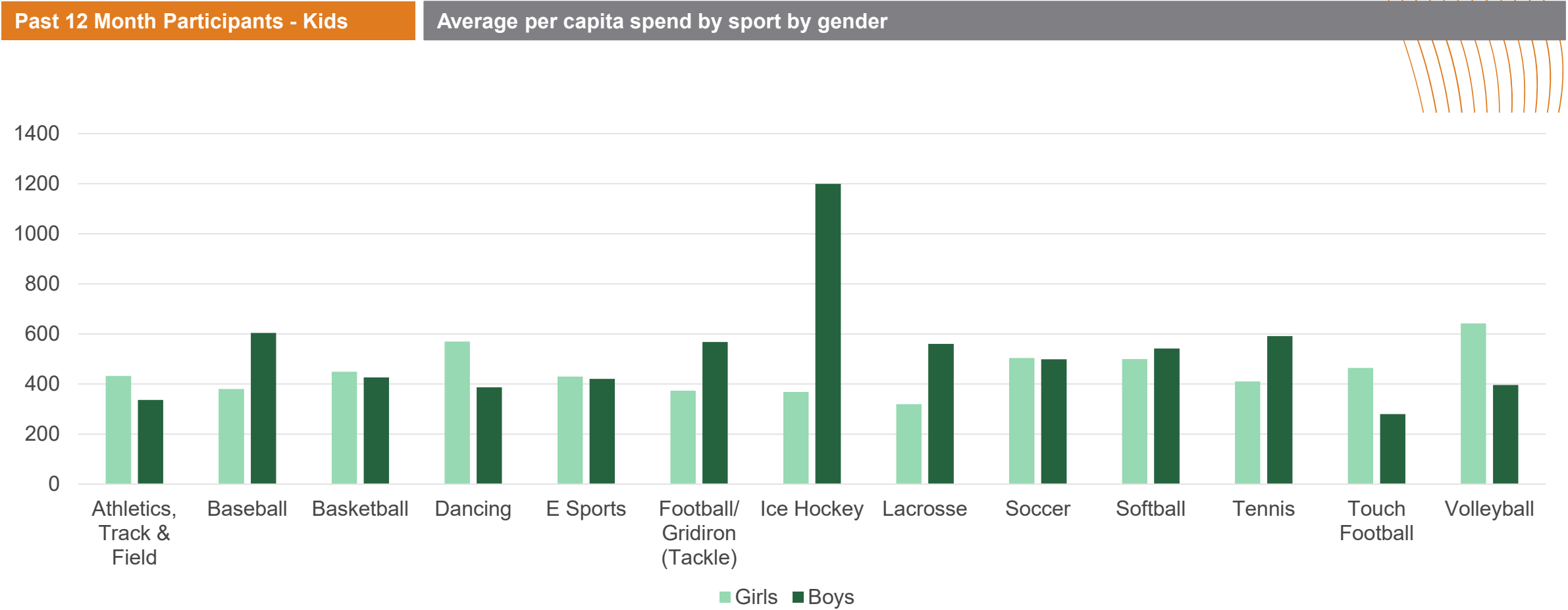
Past 12 Month Participants - Kids

Average \$ per capita annual spend x total market annual spend by sport



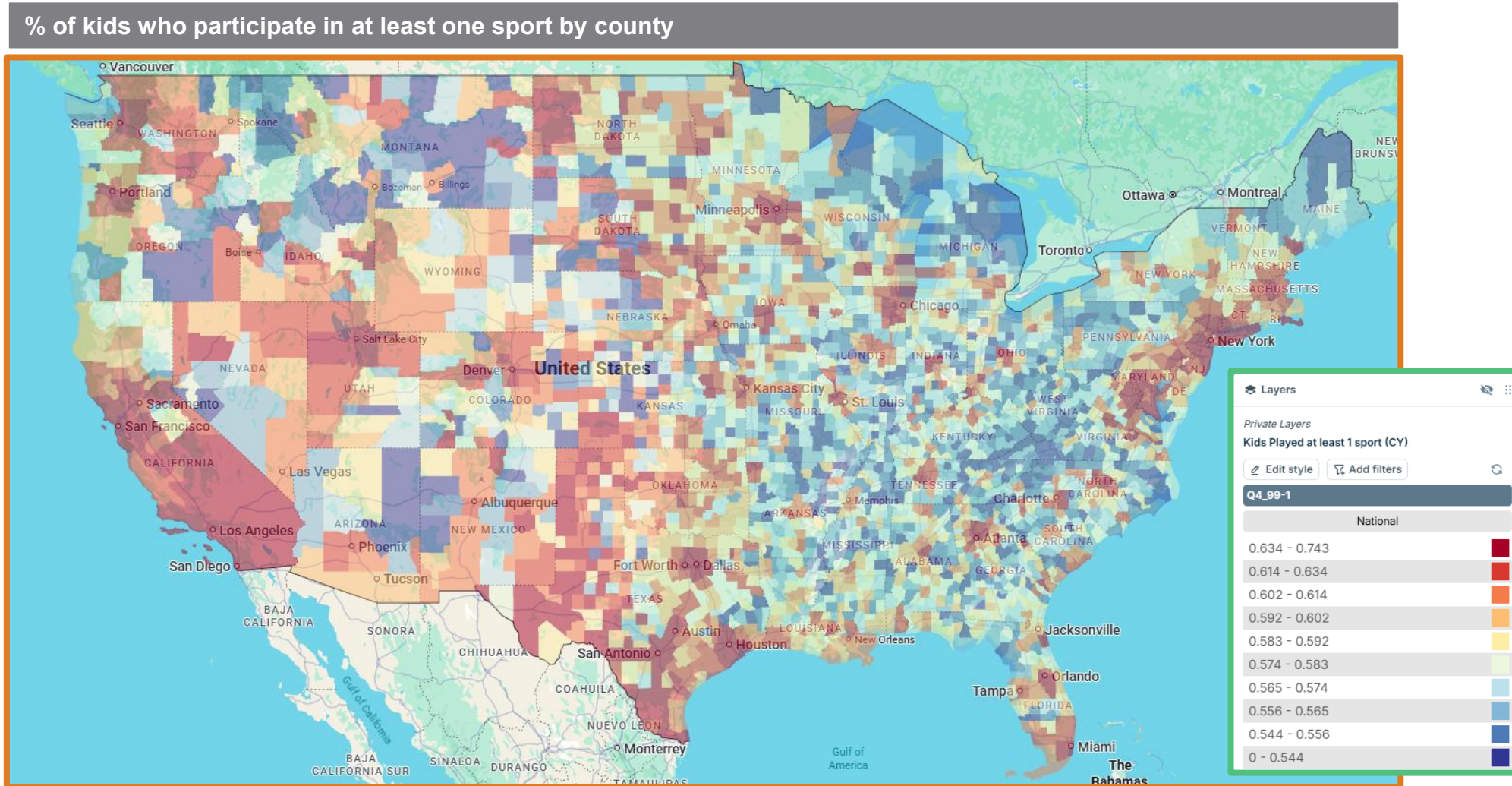


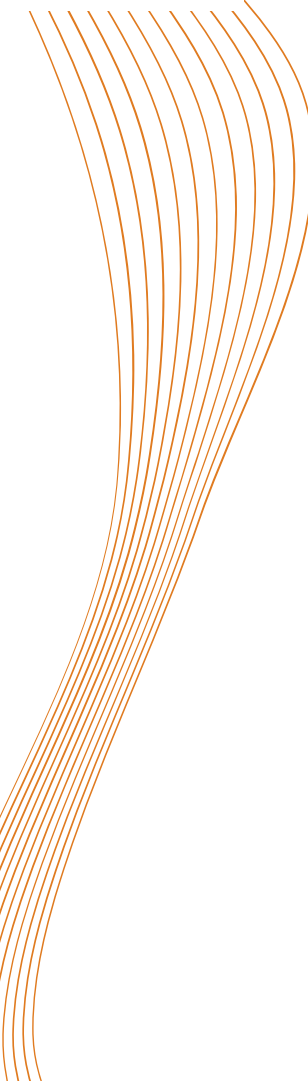
For many sports the per capita spend is relatively similar for both girls and boys





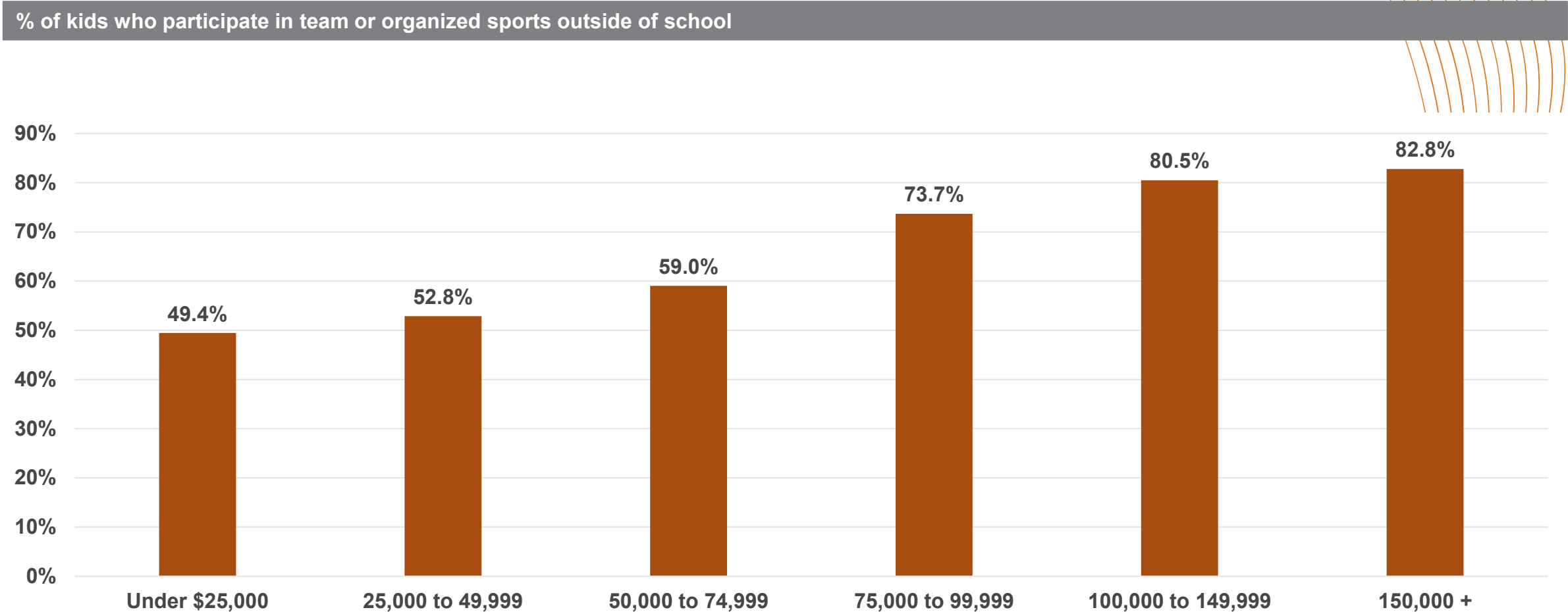
The TAM for youth sports varies significantly across the U.S.



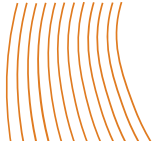




4 in 5 kids from the highest income households participate in sports outside of school compared to only 1 in 2 of kids from lowest income households



Source: Kinetica Aura Survey, Nationally Representative Survey of Adults aged 16+, Adults answer on behalf of their children. Base: March-July '25 n=2,550



KINETICA
