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KINDER, GENTLER FITNESS TRENDS

CONTINUE TO DISPLACE TRADITIONAL EXERCISE FORMS

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Pilates, Elliptical Trainers, Recumbent Bikes and Yoga

are Fastest-Growing Activities

HARTSDALE, N.Y. -- To accommodate legions of newly-arrived converts who are older, female, or both, less strenuous exercise forms and user-friendly equipment are fanning out over the landscape of physical fitness -- in some cases sweeping aside more vigorous pursuits originally aimed at the "traditional" participant. Since 1998, the top growth activities have been Pilates Training, Elliptical Motion Trainers, Recumbent Cycling and Yoga -- activities with generally older and female constituencies. These were among the findings of the 16th annual Superstudy® of Sports Participation, conducted in January 2003 among 15,063 people nationwide, by American Sports Data, Inc. (ASD).

Pilates, a hybrid resistance/balance/stretching exercise which lay dormant for the better part of a century, has resurfaced to claim 4.7 million participants nationwide -- a 92% increase over the 2001 measurement of 2.4 million. In 2002, the activity continues

to be dominated by women, who account for 90% of all participants; 67% of all Pilates exercisers were first-year participants.

The Elliptical Motion Trainer -- described as a cross between a Nordic Ski Machine and Stairclimber -- is a particularly friendly exercise to those with knee problems. By 2002, it had attracted 10.7 million participants, a surge of 177% over the 1998 benchmark of 3.9 million. Unlike certain short-lived predecessors (i.e. Nordic Skiers, Aerobic Riders) which were sustained by infomercials, Elliptical Trainers have passed the litmus test of health club acceptance -- the imprimatur which guarantees the future of fitness equipment.

According to other ASD research, 26% of the U.S. population claims to be experiencing "a lot of stress" in their lives. It is therefore no surprise that the compound measurement of Yoga/Tai Chi reflects an increase of 95% from 1998 - 2002. Yoga -- emblematic of the new genre of mind-body relaxation techniques which defy traditional categorization as "fitness" activities -- claimed 11.1 million adherents in 2002, 83% of whom were female.

Overshadowed by a far more glamorous younger sibling, Recumbent Cycling has gone virtually unnoticed. Yet, this robust growth activity has exploded to 10.2 million participants -- an increase of 51% from 1998. By contrast, the far more publicized activity of Spinning, has declined by 10% during this period, registering only 6.1 million participants in 2002.

Strength-training, once the exclusive male preserve of muscle-bound jocks, has not only earned universal acceptance, but made its largest gains among women and older fitness enthusiasts. Women now constitute 47% of all people who train with free weights, and command an identical percentage of weight/resistance machine-users -- both vibrant growth categories.

Treadmill exercise epitomizes "kinder/gentler" fitness. From its fledgling measurement of 4.4 million in 1987, a record of 43.4 million participants in 2002 marks 15 years of uninterrupted growth -- a quantum leap of 888%, including a still-vibrant 17% growth rate since 1998. Treadmill usage is the most popular cardiovascular exercise in the U.S.; 59% of its practitioners are female, 38% over the age of 45.

Aerobics and Cardio Kickboxing represent the more "traditional" fitness activities that have lost ground in recent years... arguably victims of newer, less taxing forms of exercise. From its initial measurement of 7.6 million in 1999, Kickboxing has plummeted by 22% to 5.9 million in 2002. All variations of Aerobic Dancing continue their downward spiral, dipping to a low of 16 million participants; the original High-Impact version has plunged to 5.4 million dancers in 2002, down 61% from the 1987 baseline of 14 million.

From 1998 - 2002, major losses have been sustained in three other categories: Stair-Climbers (-23%); Nordic Ski Machines (-26%); Aerobic Riders (-38%).

While the newer, less taxing fitness forms have an "older" skew than traditional "hardbody" pursuits -- Pilates, Yoga, and Treadmill Exercise have the demographic

diversity to absorb youthful defectors from Cardio Kickboxing, Step-Aerobics and other more rigorous but declining activities. For the year 2000, Pilates exercisers registered an average age of 43.6; by 2002 the mean had declined to 35.1 years. Similarly, the average age of a Yoga practitioner had declined from 41.5 in 1998 to 37.1 in 2002.

But regardless of changing exercise preferences, the fitness industry knows it can rely on a perennial ally: the growing consensus among fitness enthusiasts -- tacit or otherwise -- that they need outside motivation, discipline, know-how, and maybe even a little handholding. In 2002, health club membership across the U.S. reached a record-high 36,289,000 -- an increase of 23% over 1998, and a jump of 109% from its 1987 benchmark. 6 million people paid for the services of a personal trainer in 2002, up a full 50% from 1998.

The Superstudy® of Sports Participation was conducted in January 2003 and based on a nationally representative sample of 15,063 people over the age of 6 who were among 25,000 respondents targeted in a sample drawn from the consumer mail panel of NFO Research, Inc. 103 sports and activities were measured along over 20 demographic, attitudinal and behavioral dimensions. Data were also collected on health club membership and other subjects pertinent to physical fitness. This annual tracking study has been conducted by ASD every year since 1987, and sponsored by the Sporting Goods Manufacturers Association of North Palm Beach, Florida. For more information, call (914) 328-8877, or log onto www.americansportsdata.com.

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SELECTED FITNESS ACTIVITIES

Participated at least once
(000)
1998-2002

	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>1-Year Change 2001-2002</u>	<u>4-Year Change 1998-2002</u>
Pilates Training	n.a.	n.a.	1,739	2,437	4,671	+92%	+169% ⁽¹⁾
Elliptical Motion Trainers	3,863	5,081	6,176	8,255	10,695	+30%	+177%
Yoga/Tai Chi	5,708	6,404	7,400	9,741	11,106	+14%	+ 95%
Stationary Cycling (Recumbent)	6,773	9,771	8,947	8,654	10,217	+18%	+ 51%
Weight/Resistance Machines	22,519	22,961	25,182	25,942	27,848	+ 7%	+ 24%
Dumbbells	23,414	24,754	25,241	26,773	28,933	+ 8%	+ 24%
Hand Weights	23,325	25,862	27,086	27,078	28,453	+ 5% ^(†)	+ 22%
Home Gym Exercise	7,577	7,918	8,103	8,497	8,924	+ 5% ^(†)	+ 18%
Barbells	21,263	21,717	21,972	23,030	24,812	+ 8%	+ 17%
Treadmill Exercise	37,073	37,463	40,816	41,638	43,431	+ 4%	+ 17%
Stretching	35,114	35,278	36,408	38,120	38,367	+ 1% ^(†)	+ 9%
Ab Machine/Device	16,534	17,109	18,119	18,692	17,370	- 7% ^(†)	+ 5%

(†) Statistically insignificant at the 95% Confidence Level

SOURCE: AMERICAN SPORTS DATA, INC.

SELECTED FITNESS ACTIVITIES

Participated at least once

(000)
1998-2002
(Continued)

	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>1-Year Change 2001-2002</u>	<u>4-Year Change 1998-2002</u>
Aquatic Exercise	6,685	5,557	6,367	7,103	6,995	- 2% ^(†)	+ 5% ^(†)
Fitness Walking	36,395	35,976	36,207	36,445	37,981	+ 4% ^(†)	+ 4% ^(†)
Running/Jogging	34,962	34,047	33,680	34,857	35,866	+ 3% ^(†)	+ 3% ^(†)
Swimming (Laps/Fitness)	15,258	14,194	14,060	15,300	14,542	- 5% ^(†)	- 5% ^(†)
Stationary Cycling (Spinning)	6,776	6,945	5,431	6,418	6,135	- 4% ^(†)	- 10% ^(†)
Stationary Cycling (Upright Bike)	20,744	18,311	17,894	17,483	17,403	- 1% ^(†)	-16%
Fitness Biking (Outdoors)	13,556	12,307	11,435	10,761	11,153	+ 4% ^(†)	- 18%
Cardio Kickboxing	n.a.	7,607	7,163	6,665	5,940	-11% ^(†)	- 22% ⁽²⁾
Stair Climbers	18,609	16,288	15,828	15,117	14,251	- 6% ^(†)	- 23%
Aerobics (Net)	21,017	19,129	17,326	16,948	16,046	- 5% ^(†)	-24%
X-C Ski Machines	6,870	5,921	5,444	4,924	5,074	+ 3% ^(†)	- 26%
Aerobic Riders	5,868	4,165	3,817	3,918	3,654	- 7% ^(†)	- 38%

(1) 2-year Change

(2) 3-year Change

SOURCE: AMERICAN SPORTS DATA, INC.