



# THE UK SPORTS MARKET RESEARCH REPORT



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## **FSPA UK Sports Market Research Report Executive Summary**

The 100 page research report produced exclusively for the Federation of Sports and Play Associations (FSPA) is a timely and detailed snapshot of the current situation facing companies in the £5.7 billion sporting goods industry. It highlights an overall market coming to grips with the longest recession in the UK for a generation and points to bright spots within certain sports while some sports struggle. Written from the perspective of suppliers to the industry, readers of the report will find valuable information on the state of the market in a variety of leading sports.

Featured sports include football, rugby, cricket, golf, hockey, netball, basketball, tennis, badminton, squash, table tennis, swimming, running and triathlon, darts and snooker.

Over 60 interviews were undertaken with suppliers in each of the featured sports, as well as leading retailers, wholesalers, buying groups, trade press and school suppliers. This primary research was supplemented by an extensive review of published information from commercial research organisations as well as sports associations, governing bodies, business and news sources. In addition to this, exclusive consumer research was commissioned into the buying habits and brand awareness of participants and followers in the majority of the featured sports. This provides an interesting insight into the inter-relationships between various sports.

The report sets the sporting goods market in the general economic and demographic context. Its scope ranges from a review of the market sizes of the key segments of sports clothing, footwear and equipment, including a by-product and by-sport breakdown for the years 2009 and 2010, as well as a forecast for 2011, through to a review of the extensive number of initiatives that exist, in terms of private sponsorship and public sector support, for each of the featured sports.

Each sports market covered includes information on the market values of each of the key segments - and further detail in some cases – as well as the key trends and drivers within each sport.

Additional chapters look at the changing nature of sports distribution, with a particular emphasis on the growing importance of the Internet and the evolving role of specialist sports retailers, and information on sports participation and consumer behaviour for each of the featured sports. This highlights differences in participation between men and women, old and young and indicates how knowledgeable consumers are about the products they buy for their chosen sports.

The important school sport market is reviewed for the first time, incorporating the implications of recent changes to funding for school sports, with estimates made of the markets for school teamwear, outdoor and indoor equipment, as well as a review of the various sport-by-sport initiatives to promote sport in schools.

The report ends by drawing conclusions for the overall market and on a sport by sport basis in what is an important time for the industry looking forward to the London Olympic Games in 2012.

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### **Federation of Sports and Play Associations (FSPA)**

The FSPA is the national trade body representing over 18 trade associations and 400 members companies within the UK sport, golf, play and angling industries.

Uniting industry the FSPA's mission is:

*"To work in partnership to represent and promote expertise on behalf of UK sports and play businesses"*

The FSPA membership base consists of over 400 UK manufacturers, wholesalers, and distributors of sports and play equipment and apparel and includes some of the countries leading brands.

This membership base contribute a collective £3.1bn turnover to the UK economy and employ some 15,000+ employees.

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