

Problems viewing this email? [Click here](#) to view it in your browser.

## Global Participative Sport as Consumption: The New Rules of the Game

With increasing sedentary lifestyles helping to drive rising global obesity rates, a growing number of consumers are becoming increasingly interested in participating in sport as both a way of keeping fit and healthy and a means of self-expression. This shift in behaviour, which spans the generational divide from baby boomer retirees to generation Y and even children, is helping to drive strong demand growth in markets as varied as sports apparel, energy drinks and consumer electronics.

Strategy Briefings offer unique insight into emerging trends world-wide. Aimed squarely at strategists and planners, they draw on The International's vast information resources to give top line insight across markets and within consumer segments. Written by some of our most experienced analysts, they are designed as provocations for senior management to use in their own forum, allowing them to stand back and reflect on the behaviour and motivation driving global markets today and tomorrow

Why buy this report

- Identify factors driving change now and in the future
- Understand motivation
- Forward-looking outlook
- Briefings and presentation should provoke lively discussion at senior level
- Take a step back from micro trends
- Get up to date estimates and comment

For more information please click on:

[http://www.researchandmarkets.com/publication/m77ikeb/global\\_participative\\_sport\\_as](http://www.researchandmarkets.com/publication/m77ikeb/global_participative_sport_as)

Title Index:

GLOBAL PARTICIPATIVE SPORT AS CONSUMPTION: THE NEW RULES OF THE GAME

June 2014

Executive Summary  
Demand Factors  
Consumer Behaviour  
Commercial Impact  
Market Opportunities  
Outlook

Summary 1 Global Participative Sport: Opportunities and Challenges

Demand Factors

Growing Awareness of Obesity Risks Raises the Perceived Payoff From Sport

Table 1 Obese Population (BMI 30kg/m<sup>2</sup> or more), Top 20 Countries 2008/2013

Table 2 Overweight Population (BMI 25-30kg/m<sup>2</sup>), Top 20 Countries 2008/2013

Chart 1 Mean BMI, Top 10 Countries 2013

Table 3 "I am very worried about my health due to my lifestyle" - Selected Countries 2011  
the Changing Shape of Role Models

Female Attitudes Towards Sport Shifting

Table 4 Global Participation in Adventure Sports over the Previous Five Years 2014

Shifts in Family Structure and Life Stages

Chart 2 Fertility Rates 2013 - Top 10 and Bottom 10 Countries

Chart 3 Participation in Surfing by Region over the Previous Five Years 2014

Increasingly Active Retirees

Table 5 Healthy Female Life Expectancy at 60 Years - Top 20 Countries 2008/2013

Table 6 Healthy Male Life Expectancy at 60 Years - Top 20 Countries 2008/2013

Urbanisation and Sedentarism Have Profound Lifestyle Impacts

Table 7 Urban Population - Top 30 Countries 2013

the Rise of Experiential Consumption

Table 8 Importance of Limited Daily Stress - Selected Countries 2011/2013

the Decline of Manual Labour

Chart 4 US: Employment in Selected Sectors 2003-2013

the Internet Lets A Thousand Sporting Flowers Bloom

Table 9 Percentage of the Population Using the Internet - Top 20 Countries 2008/2013

Table 10 Mobile Internet Subscriptions - Top 20 Countries 2008/2013

Sport As Signifier and Status Symbol

Table 11 Importance of Regular Exercise - Selected Countries 2011/2013

in Search of A Fountain of Youth

Chart 5 Median Age of Population - Top 10 Countries 2008/2013/2018

Chart 6 Population by Marital Status - Germany 2008/2013/2018

Chart 7 Participating at a Gym or Sports Facility (hours per week) - Youth in Selected  
Countries 2011-2013

Consumer Behaviour

Surveys

Extreme Sports - in Search of Safe Danger?

Chart 8 Participation in Selected Sporting Activities in the UK 2005/06-2012/13

Chart 9 Participation in Mountaineering/Bouldering by Region over the Previous Five Years  
2014

Adventure Sports - A Lifestyle for Some

Chart 10 Participation in Triathlons in the UK 2009-2012

Table 12 Number of Triathlon Clubs in the US 2000-2012

Chart 11 Participation in Adventure Races over the Previous Five Years by Region 2014

Cycling Revival

Table 13 Proportion of Households with a Bicycle - Top 20 Countries 2008/2013

Table 14 EU27 Bicycle Sales 2007-2012

Chart 12 Participation in Mountain Biking over the Previous Five Years over the Previous Five  
Years by Region 2014

Gyms Still Popular, But Competition Within the Sector Is Hotting Up

Chart 13 Participation in Fitness Activities in Australia 2009/2010

Winter Sports Struggle Against A Difficult Economic Background

Table 15 Participation in Snow Sport in the UK 2005/06-2012/13

Chart 14 Participation in Alpine/Downhill Skiing or Snowboarding by Region over the

Previous Five Years 2014

Chart 15 Participation in Cross-Country Skiing by Region over the Previous Five Years 2014

Emerging Market Running Boom

Chart 16 Participation in Marathons over the Previous Five Years by Region 2014

Chart 17 Running Participation in the US 2012

Increased Emphasis on Structured Play in Childhood

Putting "fun" Into Unemployment

Chart 18 Participation in Open Water Swimming over the Previous Five Years by Region 2014

"geek" and "hipster" Sports - Sport for All?

Commercial Impact

Gyms Seek Specialised Niches

in Search of Peak Performance With Coaching and Training

Sportswear on the Catwalk

Chart 19 Global Value Sales of Sportswear 2008-2013

Chart 20 Sales of Sportswear by Region 2008/2013

Table 16 Global Sales of Sportswear by Category 2008/2013

Middle Aged Men Splash Out on Sports Equipment

Chart 21 Global Value Sales of Sunglasses 2008-2013

Chart 22 Purchase of Specialised Equipment or Apparel 2014

Emerging Markets Drive Growth in Sports and Energy Drinks

Chart 23 Global Off-trade Volume Sales of Sports Drinks 2008-2013

Table 17 Sports Drinks - Top 20 Markets 2008/2013

Chart 24 Global Off-trade Volume Sales of Energy Drinks 2008-2013

Table 18 Energy Drinks - Top 20 Markets 2008/2013

Vitamin and Dietary Supplements - Popular, But Sometimes Controversial

Chart 25 Global Value Sales of Vitamin and Dietary Supplements 2008-2013

Table 19 Vitamin and Dietary Supplements - Top 20 Markets 2008/2013

Table 20 Taking Dietary/Nutritional Supplements, Selected Countries 2011/2013

Sports Nutrition Goes Mainstream

Chart 26 Global Sales of Sports Nutrition 2008-2013

Chart 27 Global Sales of Protein Products in Sports Nutrition 2013

Chart 28 Sales of Sports Nutrition, Selected Countries 2008/2013

Market Opportunities

Luxury Brands Eye Sportswear Market

Tourists Get Active

in the Search of the Food of Champions

Chart 29 Global Sales of Health and Wellness Food and Beverages by Type 2008/2013

Table 21 Sales of Health and Wellness Food and Beverages - Top 20 Markets 2008/2013

Digging Deep To Boost Performance

Gadgets Facilitate the Evolution of the "quantified Self"

Chart 30 Global Sales of Video Games Hardware by Type 2007-2012

Chart 31 Global Sales of HD Camcorders 2007-2012

on the Cusp of An App Revolution

Table 22 Current and Forecast Volume Sales of Smartphones 2007-2017

Table 23 Volume Sales of Smartphones Top 20 Countries 2012

Active Wear for the Sporty Pet  
Outlook and Implications  
An Urban Future Bodes Well for Sports Participation  
Table 24 Urban vs Rural Population - Selected Countries 2013/2030  
Obesity Problem Spreading Beyond Developed Economies  
Chart 32 Mean BMI - Selected Western European Countries 2013/2020  
Chart 33 Mean BMI - Selected Middle Eastern Countries 2008/2013  
Table 25 China: Obese and Overweight Population 2008-2013  
Increased Segmentation in Gym Market?  
Chart 34 Gini Index - Selected Countries 2008/2013  
Diet Is More Important Than Exercise?  
Table 26 Global Sales of Vitamins and Dietary Supplements 2013-2018  
Chart 35 Global Sales of Health and Wellness Food and Beverages 2013-2018  
the Real Tech Revolution Is Yet To Come  
Chart 36 Global Smartphone Sales by Region 2012/2017  
Too Much of A Good Thing?  
Epigenetics Posits Potential Generational Benefits for Exercisers  
A Playful Reaction To Hypercompetitvity?

Pricing:

Electronic (Single User): EUR 1955  
Electronic (Site License): EUR 3910  
Electronic (Enterprisewide): EUR 5864

Ordering - Three easy ways to place your order:

- 1] Order online: Please [click here](#) to order online from our website
- 2] Order by fax: Please [click here](#) to print an order form that you can fax to +353 1 4100 980
- 3] Order by mail: Please [click here](#) to print an order form that you can post to Research and Markets, Guinness Centre, Taylors Lane, Dublin 8, Ireland.

Thank you for your consideration.

Best Regards,

Amy Cole  
Senior Manager  
Research and Markets Ltd  
[amy.cole@researchandmarkets.com](mailto:amy.cole@researchandmarkets.com)

Research and Markets, Guinness Centre, Taylors Lane, Dublin 8, Ireland.