



*Australian Sporting Goods
Association Inc.*

**AUSTRALIAN SPORTING GOODS ASSOCIATION (ASGA)
MARKET INTELLIGENCE SURVEYS 2011/12**

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INTRODUCTION



ASGA conducts Market Intelligence surveys of the sporting goods and active lifestyle industry. Data is collected from across industry participants.

The surveys are undertaken by a third-party specialist provider. Utilising a third-party maintains confidentiality of the raw data and ensures accuracy. In 2011/12 our survey provider is 10ThousandFeet. www.10thousandfeet.com.au



In 2011/12 Market Intelligence surveys will be conducted across the following categories;

| | |
|-------------------------------|--|
| Cricket Equipment | Annual Survey |
| Racquet Sports Equipment | Annual Survey with quarterly snapshots |
| Golf Equipment Australia | Annual Survey with quarterly snapshots |
| Golf Equipment New Zealand | Annual Survey |
| Compression Garments | Quarterly |
| Footwear Surveys | Quarterly |
| Apparel | Quarterly |
| Retail sales Footwear Apparel | Quarterly |

New additions to ASGA's survey offerings in 2011/12 will include;

- An improved data collection portal utilising a specialist email tool.
- Improved survey outputs with data displayed in new and improved formats.
- Insights and commentary on external factors and economic circumstances that affect sales.
- Retail surveys to collect both online and in-store sales data.
- Apparel surveys will be increased to quarterly.
- Retail surveys will be quarterly.
- Survey data outputs to be accompanied by written snapshots and overviews.
- The cost of some surveys will decrease.
- A new compression garment survey will be introduced in 2011/12.

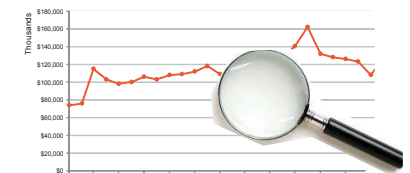
Email Summary



Succinct email summary of the most important findings



Reporting with excel tabs and up to two graphs per category



Secondary research on external factors

2 SUBSCRIPTION COSTS



ASGA Members can subscribe to Market Intelligence surveys. Members who take out a Sport Development Fund (SDF) Membership receive a 10% discount off the cost of their survey subscriptions.

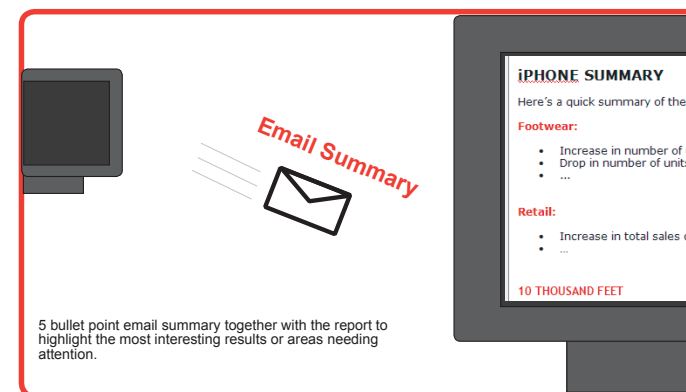
A full suite of surveys can be purchased at a discounted rate saving over \$1,300.

Survey subscription costs for 2011/12 (GST inc.)

| | Industry Member Price | SDF Member Price |
|----------------------|-----------------------|------------------|
| Cricket | \$550 | \$495.00 |
| Racquet Sports | \$550 | \$495.00 |
| Golf (Aust) | \$2000 | \$1800 |
| Golf (NZ) | \$687.50 | \$618.75 |
| Compression Garments | \$1,650 | \$1,485 |
| Footwear Surveys | \$2,860 | \$2,574 |
| Apparel Surveys | \$2,860 | \$2,574 |
| Retail | \$2,860 | \$2,574 |
| Full access | \$12,650 | \$11,385 |



Email Summary



By purchasing full access you save over \$1300.

SDF Members receive the 10% Discount on surveys.

* Subscription period runs from 1 July to 30 June

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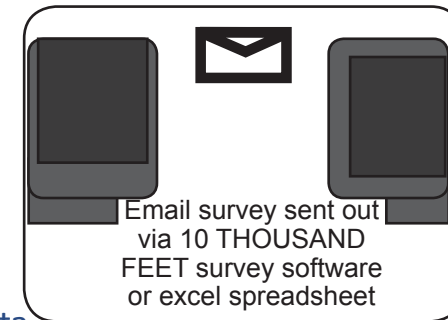
HOW IT WORKS



Once you subscribe to an ASGA survey your survey subscription will be coded to the Member's section of the ASGA website. You will be provided with a username and password by the ASGA office and access will be granted for the surveys you have subscribed to and paid for.

Data Collection:

- If you subscribe to a survey you agree (if appropriate) to submit your company's data to the survey at the intervals appropriate for each survey.
- Data submitted late will incur additional costs and participants must agree to adhere to time lines at the time of subscription.
- ASGA will ask you for the names of the people in your company who should receive the request to provide data.
- At the end of each nominated collection period (either quarterly, half yearly or annually) ASGA's third party provider, 10ThousandFeet, will email those people you have nominated in your company to be responsible for provision of data and they will provide the raw data directly to 10Thousand Feet.
- ASGA, nor any other industry participant will see the raw data you input, so the confidentiality of your data is secure. Only ASGA's third-party provider receives the raw data.
- 10ThousandFeet will compile the data, checking accuracy of the figures and then compile the report.



Completed Surveys:

- Once all survey data has been provided and is analysed and compiled into a report, 10ThousandFeet provide ASGA the finalised survey. ASGA does not see the raw data.
- ASGA will upload the finalised survey results to the secure section of the ASGA website and will advise subscribers by email that the completed surveys are available for download.
- The secure members section of the ASGA website will only allow access to survey subscribers who have signed up and paid for a subscription.
- Subscribers will be asked to provide ASGA with all the names of staff who need to access the completed surveys and we will ensure the necessary username and password and permissions are provided.

4 SURVEY OUTPUT



ASGA has taken additional steps to improve the output of its surveys. When you receive the final survey you will receive the information in new and improved formats. You will also receive other information such as ABS statistics and other information about economic impacts on our industry.

EXAMPLE FOOTWEAR SURVEY

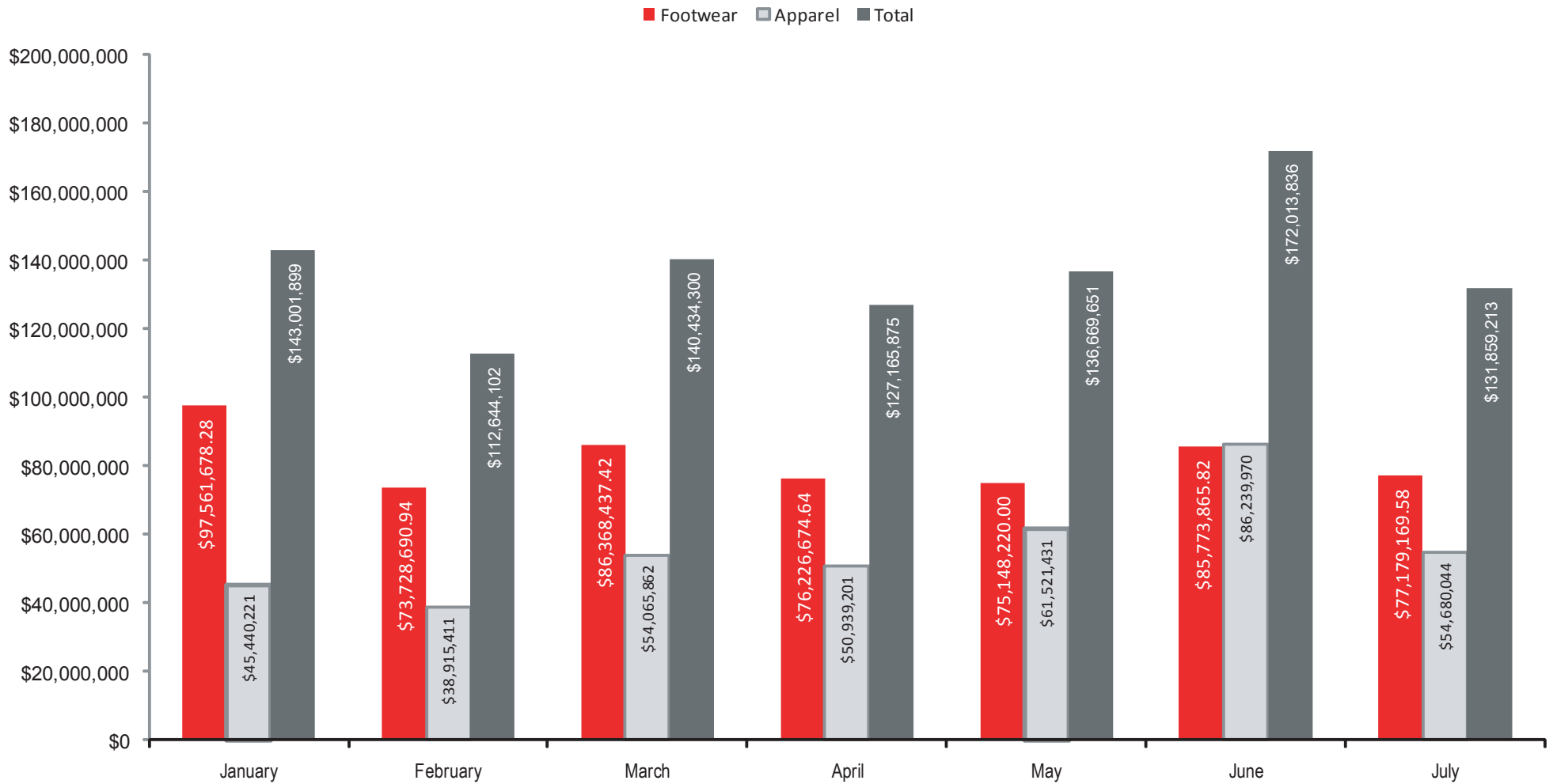
| Category | Units Dispatched from Warehouse(s) | | | | \$\$\$ Dispatched from Warehouse(s) | | | | ASP |
|--------------------------|---------------------------------------|----------------|----------------|------------------|--|---------------------|---------------------|---------------------|----------------|
| | Men | Women | Children | TOTAL | Men | Women | Children | TOTAL | |
| Cross Training | 120,795 | 72,726 | 96,666 | 290,187 | \$6,589,796 | \$4,145,011 | \$3,270,408 | \$14,005,215 | \$48.26 |
| Running | 366,788 | 285,112 | 129,833 | 781,733 | \$25,143,764 | \$20,320,870 | \$4,887,498 | \$50,352,133 | \$64.41 |
| Basketball | 20,895 | 98 | 5,934 | 26,927 | \$1,407,555 | \$4,753 | \$273,936 | \$1,686,243 | \$62.62 |
| Court - Indoor | 2,406 | 930 | 0 | 3,336 | \$150,947 | \$69,553 | \$0 | \$220,501 | \$66.10 |
| Court - Outdoor | 10,079 | 4,419 | 6,420 | 20,918 | \$690,682 | \$225,159 | \$259,104 | \$1,174,945 | \$56.17 |
| Football - Moulded Sole | 52,571 | 79 | 12,886 | 65,536 | \$3,090,204 | \$6,136 | \$384,386 | \$3,480,726 | \$53.11 |
| Football - Screw in Sole | 776 | 0 | 89 | 865 | \$80,247 | \$0 | \$1,477 | \$81,724 | \$94.48 |
| Turf Shoes | 2,680 | 782 | 91 | 3,553 | \$155,353 | \$55,447 | \$5,401 | \$216,202 | \$60.85 |
| Netball | 0 | 14,302 | 4,496 | 18,798 | \$0 | \$1,111,083 | \$212,392 | \$1,323,474 | \$70.41 |
| Cleated | 135 | 0 | 3 | 138 | \$6,795 | \$0 | \$82 | \$6,877 | \$49.83 |
| Ath/Leisure | 272,554 | 60,709 | 114,441 | 447,704 | \$13,040,724 | \$2,791,360 | \$2,835,100 | \$18,667,183 | \$41.70 |
| Walking | 15,024 | 25,101 | 0 | 40,125 | \$749,255 | \$1,258,462 | \$0 | \$2,007,718 | \$50.04 |
| Outdoor | 4,693 | 1,563 | 4,572 | 10,828 | \$224,340 | \$77,108 | \$106,582 | \$408,030 | \$37.68 |
| Track and Field | 2,241 | 282 | 511 | 3,034 | \$141,843 | \$11,430 | \$12,137 | \$165,410 | \$54.52 |
| Sandals | 9,427 | 7,035 | 6,394 | 22,856 | \$198,336 | \$128,417 | \$113,702 | \$440,456 | \$19.27 |
| Total Market | 881,064 | 473,138 | 382,336 | 1,736,538 | \$51,669,843 | \$30,204,790 | \$12,362,204 | \$94,236,837 | \$54.27 |

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SURVEY OUTPUT



EXAMPLE RETAIL SURVEY OFFLINE V ONLINE

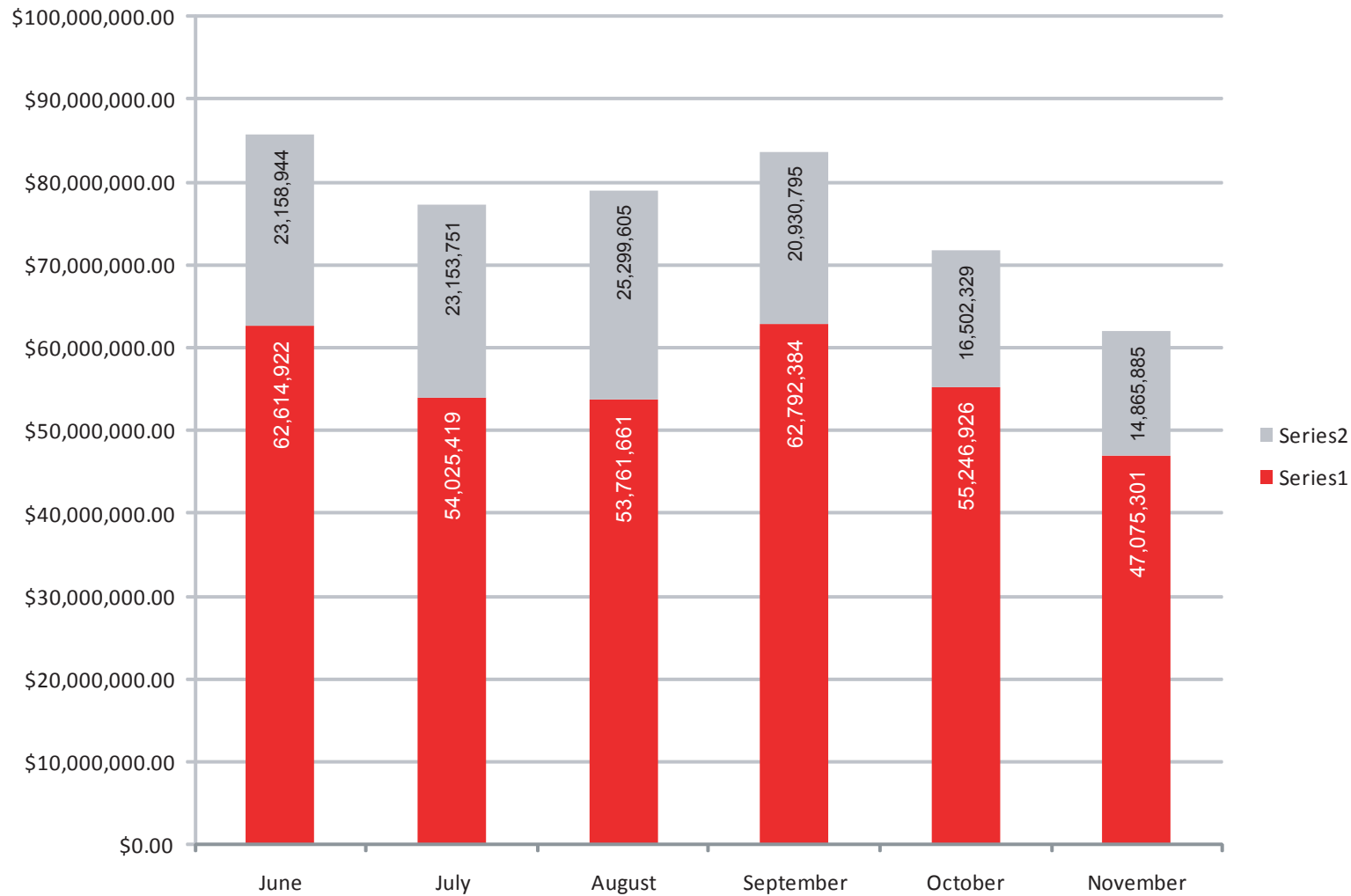


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SURVEY OUTPUT



EXAMPLE RETAIL SURVEY OFFLINE V ONLINE



7

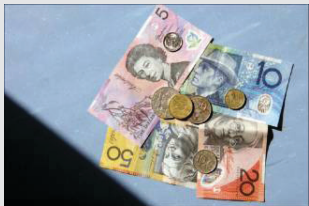
SURVEY OUTPUT



Trends and External Factors

Hypothetical example

Government Stimulus Package



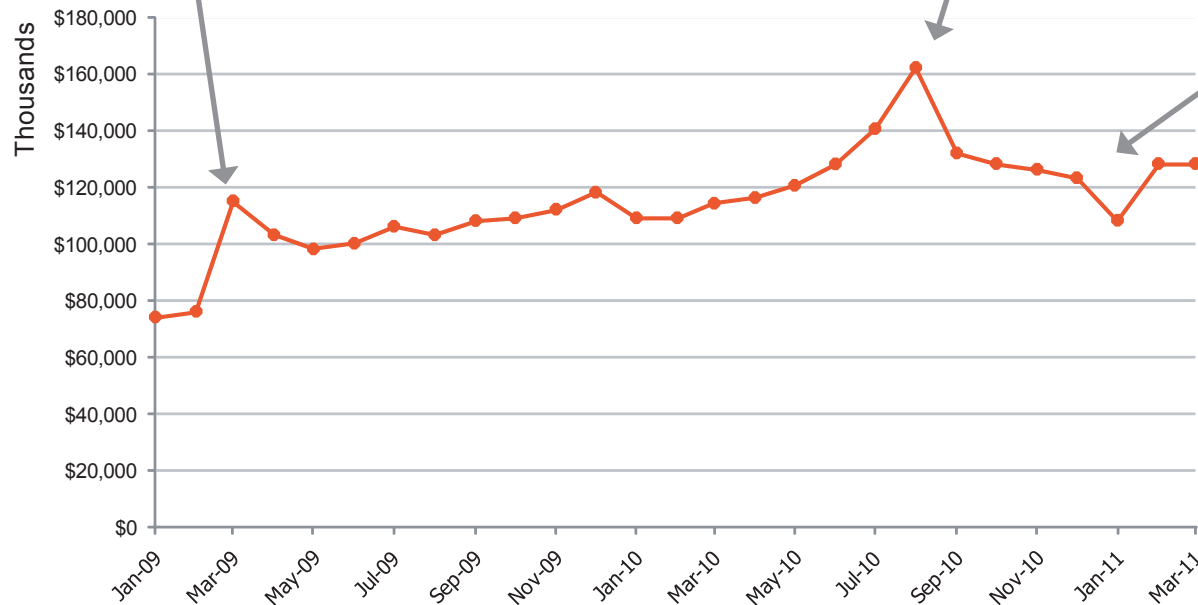
South Africa World Cup



Queensland Floods



Footwear Sales



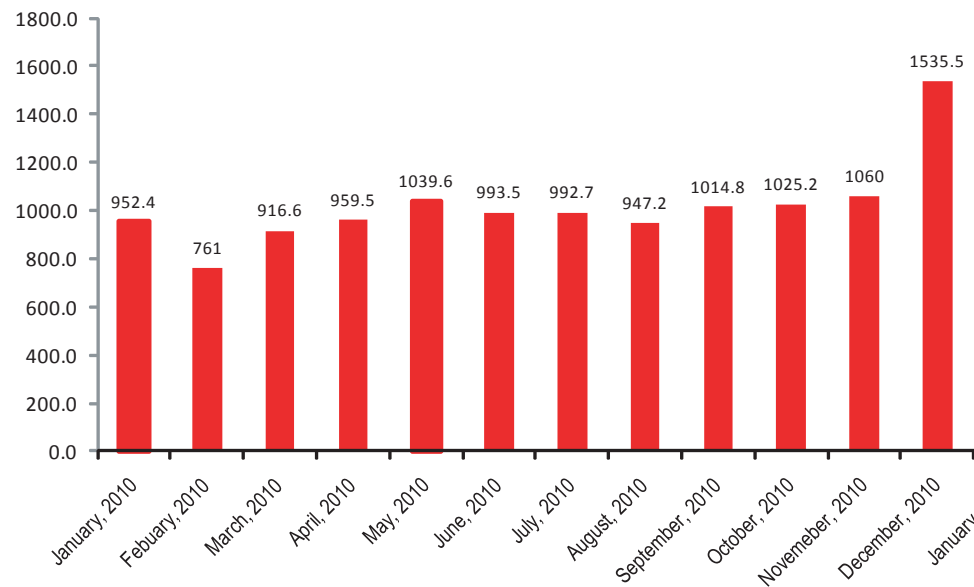
Other Influencing Factors

| | |
|----------|--|
| Aug 2010 | Federal Election |
| Mar 2011 | NSW State Election |
| Mar 2011 | ICC Cricket World Cup |
| Apr 2011 | Australian dollar highest value ever compared to US dollar |
| Sep 2011 | Rugby World Cup |

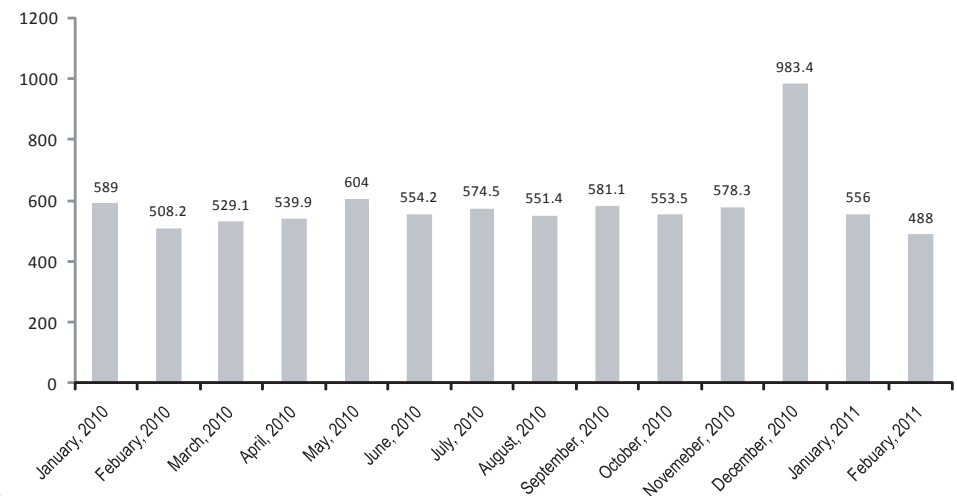
ABS Statistics included in the report

(Added value for members who will have everything in one place)

ABS - Clothing retailing (in millions)



ABS - Footwear and Accessories (in millions)





CRICKET EQUIPMENT SURVEY



The ASGA Cricket Survey occurs as an annual survey and costs \$550 for Members or \$495 for Sports Development Fund (SDF) Members.

The Cricket Survey is a comprehensive analysis of the cricket equipment industry. ASGA has access to this information dating back to 2001 and can demonstrate the fluctuations of sales in cricket equipment during this time. A subscription to this survey will give you access to historical data.

The categories for the Cricket Survey are determined by consultation with the industry and those who subscribe to the surveys. If a category of information needs to be altered or added agreement is sought from the majority of survey participants. Please contact the ASGA office if there are categories of data that you believe need to be amended.

The Cricket Survey is conducted across the following areas and information is collected and results provided for both units per item and dollar value.

The categories for the cricket equipment survey for 2011/12 are:

- BATS Senior (English Willow)
- Senior (Kashmir)
- Junior (English Willow, 3 harrow)
- Junior (Kashmir, 3 harrow)

- BALLS (DOZENS)
- Leather
- Synthetic

NB (Information is provided in both units dispatched from warehouse and in dollars. Sales are pre GST invoiced value)

- PROTECTIVE EQUIPMENT
- PADS
- Senior
- Wicket Keeping
- Junior (Youth)

- GLOVES
- Senior
- Wicket Keeping
- Junior (Youth)

- HELMETS (ALL Helmets)
- BAGS (All Bags)

- FOOTWEAR
- Men's Spiked
- Men's Rubber
- Women's Spiked
- Women's Rubber
- Children's Spiked
- Children's Rubber

- APPAREL
- Shirts
- Tops
- Trousers
- Caps
- Wide brimmed hats

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RACQUET SPORTS EQUIPMENT SURVEY



The ASGA Racquet Sports Survey is an annual survey with snapshots provided after every quarter. The cost is \$550 for Members or \$495 for Sports Development Fund Members.

The Racquet Sports Survey **covers both tennis and squash** racquets and equipment. The data in the Racquet Sports Survey dates back to 1998 and subscription to this survey provides you with access to historical data.

The categories and price points for the Racquet Sports Survey are determined by consultation with the industry and those who subscribe to the surveys. If a category of information needs to be altered or added agreement is sought from the majority of survey participants. Please contact the ASGA office if there are categories of data that you believe need to be amended.

The survey is conducted across the following areas and information is collected and results provided for both units per item and dollar value. The categories for the Racquet sports equipment survey for 2011/12 are:

*WASP = Wholesale Average Selling Price)

TENNIS RACQUETS

ADULT GRAPHITE

- Super premium (more than \$240 WASP)
- Premium Plus (more than \$180 less than WASP)
- Premium (more than \$120 less than \$180 WASP)
- Medium (more than \$60 less than \$120 WASP)
- Value (Less than \$60 WASP)

OTHER

- Adult Fused
- Adult aluminium
- Junior

TENNIS BALLS

- Pressurised Club quality (Dozens)

SQUASH RACQUETS

ADULT GRAPHITE

- Super premium (more than \$240 WASP)
- Premium Plus (more than \$180 less than WASP)
- Premium (more than \$120 less than \$180 WASP)
- Medium (more than \$60 less than \$120 WASP)
- Value (Less than \$60 WASP)

OTHER

- Adult Fused
- Adult aluminium
- Junior

SQUASH BALLS (Dozens)

- STRINGS (All strings, tennis, squash, badmitton)



GOLF EQUIPMENT SURVEYS - AUS & NZ



The Golf Australia survey occurs as an annual survey with snapshots provided after every quarter. The Golf NZ Survey occurs annually.

The cost for the Golf Australia Survey is \$2000 for Members or \$1800 for Sports Development Fund Members.

The cost for the Golf NZ Survey is \$687.50 for Members or \$618.75 for Sports Development Fund Members.

The data in the Golf Australia Survey dates back to 2001 and the Golf NZ Survey dates back to 2005. Subscription to these surveys provides you with access to historical data.

The categories and price points for both surveys are determined by consultation with the industry and those who subscribe to the surveys. If a category or price point needs to be altered or added agreement is sought from the majority of survey participants. Please contact the ASGA office if there are categories of data that you believe need to be amended.

The survey is conducted across the following areas and information is collected and results provided for both units per item and dollar value. The categories for the Golf Australia Survey for 2011/12 are:

NON LICENCE BRANDED

- Polos Long and Short Sleeve (Under \$45)
- Polos Long and Short Sleeve. (\$30-\$45)
- Polos Long and Short Sleeve (Under 30)
- Vests
- Jumpers/Windsheaters
- Windbreakers/Windshirts
- Wet Weather Jackets
- Wet Weather Pants
- Shorts

ACCESSORIES

- Caps
- Other head wear
- Socks (gender specific pairs)
- Socks (unisex pairs)
- Gift packs)

GOLF SHOES (both men and women's collected and reported separately)

- Under \$112
- \$90-\$120
- \$60-\$90
- \$45- 60
- under \$45

BALLS

15 BALL PACKS

Over \$12
 \$10- \$12
 Under \$10

12 BALL PACKS

Over \$36
 \$30 - \$36
 \$24 - \$30
 \$18 - \$24
 Under \$12

OTHER BALLS

Bulk Loose (Dozens)
 All Range Balls (Dozens)
 Ball Gift Packs

EQUIPMENT

GOLF CLUBS

INDIVIDUAL WOODS

DRIVERS

Under \$300
 \$150 - \$300
 \$50 - \$150
 Under \$150
 Junior (any WASP)

FAIRWAY WOODS

Over \$150
 \$100 - \$150
 \$50 -\$100
 Under \$50
 Junior (any wasp)

HYBRIDS

Over \$150
 \$100 - \$150
 \$50 -\$100
 Under \$50
 Junior (any wasp)

INDIVIDUAL IRONS

Over \$100
 \$75 - \$100
 \$50 - \$75
 Under \$50
 Junior (any WASP)

INDIVIDUAL WEDGES

Over \$100
 \$75 - \$100
 \$50 - \$75
 Under \$50
 Junior (any WASP)

INDIVIDUAL PUTTERS

Over \$150
 \$100 - \$150
 \$50 -\$100
 Under \$50
 Junior (any wasp)

SETS

(Any combination of clubs not
 Including bag or buggy)
 Over \$300
 \$200 - \$300

PACKAGE DEALS

Mens/Ladies -
 (any combination club and bag)
 Juniors
 (any combination club and bag)

GOLF GLOVES

Over \$12.50
 \$10 - \$12.50
 \$7.50 - \$10
 \$5 - \$7.50
 Under \$5

GOLF BAGS

Over \$200
 \$130 - \$200
 \$100 - \$130
 \$70 - \$100
 \$50 - \$70
 Under \$50
 Junior (any WASP)

GOLF BUGGIES

Over \$90
 \$60 - \$90
 \$30 - \$60
 Under \$30

GOLF SHOES

(Men's and Women's broken down
 separately)
 Over \$90
 \$75 - \$90
 \$60 - \$75
 \$40 - 60
 Under \$45

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COMPRESSION GARMENTS SURVEY



The ASGA Compression Garment survey is a new survey being introduced in 2011/12 to capture and report data on the growing compression garment market in the industry. The cost for the ASGA Compression Garment Survey is \$1650 for Members or \$1485 for Sports Development Fund (SDF) Members.

The Compression Garment survey will be a quarterly survey and the categories will be determined by consulting with subscribers and industry participants.

It is envisaged that the categories will be broken down along the following draft lines.

MENS

- Long Sleeve tops
- Short Sleeve tops
- Singlets and sleeveless tops
- Long Tights
- Half Tights
- Shorts Tights
- Gloves
- Calf Tights
- Other

WOMEN'S

- Long Sleeve tops
- Short Sleeve tops
- Singlets and sleeveless tops
- Long Tights
- Half Tights
- Shorts Tights
- Gloves
- Calf Tights
- Other

Information will be collected from interested industry participants to assist ASGA and 10ThousandFeet in developing this survey.



FOOTWEAR SURVEY



The ASGA Footwear Survey occurs quarterly. The cost for the Footwear Survey is \$2860 for Members or \$2574 for Sports Development Fund (SDF) Members.

The data in the Footwear Survey dates back to 1995. Subscription to these surveys provides you with access to historical data.

The categories are determined by consultation with the industry and those who subscribe to the surveys. If a category of information needs to be altered or added agreement is sought from the majority of survey participants. Please contact the ASGA office if there are categories of data that you believe need to be amended.

The survey is conducted across the following areas and information is collected and results provided for both units per item and dollar value. Categories are broken down to both Men's and Women's

The categories for the Footwear Survey for 2011/12 are:

- | | |
|--------------------------|-----------------|
| Cross Training | Track and Field |
| Running | Cricket Rubber |
| Basketball | Cricket Spikes |
| Court - Indoor | Sandals |
| Court - Outdoor | |
| Football - Moulded Sole | |
| Football - Screw In Sole | |
| Turf Shoes | |
| Netball | |
| Cleated | |
| Ath/Leisure | |
| Walking | |
| Outdoor | |

NB (Information is provided in both units dispatched from warehouse and in dollars. Sales are pre GST invoiced value)



APPAREL SURVEY



The ASGA Apparel Survey occurs quarterly in 2011/12 increasing in frequency. In previous years it has been a half yearly survey however feedback from members indicated a desire to increase the frequency of data collection and reporting. The cost for the Apparel Survey is \$2860 for Members or \$2574 for Sports Development Fund (SDF) Members

The data in the Apparel Survey dates back to 1997. Subscription to these surveys provides you with access to historical data.

The categories are determined by consultation with the industry and those who subscribe to the surveys. If a category of information needs to be altered or added agreement is sought from the majority of survey participants. Please contact the ASGA office if there are categories of data that you believe need to be amended.

The survey is conducted across the following areas and information is collected and results provided for both units per item and dollar value. Categories are broken down to both Men's and Women's

The categories for the Apparel Survey for 2011/12 are:

| | | | |
|--|----------------------------|------------------------------|-----------------------------------|
| NON-LICENSED BRANDED LIFESTYLE FASHION | NON-LICENSED BRANDED OTHER | Running shirts | Football tops |
| Track Suits | Track Suits | Running tops | Football shorts |
| Separate pants | Separate pants | Fitness shorts | |
| Jackets | Jackets | Fitness workout pants | LICENSED |
| Hoods | Hoods | Fitness crop/bra/top singlet | AFL jumpers and guernseys |
| T-shirts | T-shirts | Tennis Tops | AFL other licensed apparel |
| Polos | Polos | Tennis Shorts | NRL Jumpers and guernseys |
| Singlets/tanks | Singlets/tanks | Tennis Shirts | NRL other licensed apparel |
| Sweat tops | Sweat tops | Tennis Dresses | ARU jumpers and guernseys |
| Shorts | Shorts | Basketball Shorts | ARU other licensed apparel |
| | Running Singlets | Basketball singlets | Soccer domestic and international |
| Accessories (bags, caps, socks) | Running Shorts | Basketball shooting Shirts | NBA |
| | | Basketball warm ups | Cricket Australia |
| | | | Other |

In 2011/12 the ASGA Retail Survey will be conducted on a quarterly basis. Finalised results will be reported at the end of every quarter following submission and compilation of subscriber data. The cost of the Retail Survey is \$2860 for Members or \$2574 for

Sports Development Fund (SDF) Members

The Retail Survey is conducted across Footwear and Apparel and provides an indication of the fluctuation in the sporting goods retail market.

The surveys are designed to quantify, as accurately as possible, the size of the internationally branded wholesale footwear and apparel markets by detailed category within Australia.

Uplift data is calculated with the assistance of retailer panels. Retailers are asked to fill out a questionnaire that is in the same format as that filled out by the wholesalers. However, the wholesalers provide information relating to their sales only whereas the retailers provide information on a proportional basis according to guidance they are provided by 10ThousandFeet as to the wholesalers that have chosen not to participate in a given survey. The information is provided for three categories of wholesalers:

- Category 1 - those that have provided data;
- Category 2 - those that have not provided data but would be considered part of the survey frame;
- Category 3 - those that have not provided data and would not be considered part of the survey frame (eg. skate shoe & apparel wholesalers who may be added to surveys at some stage in the future).

For example, Retailer A in the apparel survey may determine that 85% of men's tracksuits were sold by Category 1 wholesalers, 10% by Category 2 wholesalers and 5% by Category 3 wholesalers.

The information is then weighted on the basis of the total wholesale purchases of the retailer for the given period. Retailer A may have reported total apparel sales of \$10 million and Retailer B may have total sales of \$5 million. For a two-member panel, this means that Retailer A's overall weighting would be 0.67 (i.e. 10/15) retailer A's uplift contribution for men's tracksuits would then be calculated as

$$\begin{aligned} &= (\% \text{ Category 2 sales}) / (\% \text{ Category 1 sales}) * \text{weighting} \\ &= 0.1 / 0.85 * .67 \\ &= 0.078 \end{aligned}$$

17 RETAIL SURVEY CONT.



= 7.8%

The individual retailers' weighted uplifts are then added together to calculate the uplift factor.

Uplift factor = Retailer A uplift + Retailer B uplift

= 7.8% (from above) + 4.4% (say)

= 12.2%

The 'raw' total of sales reported by Category 1 wholesalers is then multiplied by the total uplift factor to arrive at an estimate of the actual category size.

Total category size = Sum of Category 1 wholesalers' sales \times (1 + uplift factor)

= \$500,000 (say) \times (1 + .122)

= \$610,000

Implications

Use of the uplift factor process is an excellent method to produce accurate data when both the Category 1 wholesalers and the retailer panel account for a reasonably large proportion of sales.



CONTACTS



For information or queries about the ASGA Market Intelligence Surveys please contact the ASGA office. Sales enquiries, questions about subscriptions and access to the data should be directed directly to ASGA.

If the query is of a technical nature that cannot be answered by the ASGA team it will be directed by ASGA to the third-party provider 10ThousandFeet. All matters must be addressed to ASGA in the first instance. Queries or questions raised directly with 10ThousandFeet that have not first been directed to ASGA will be referred back to ASGA by 10ThousandFeet.

If you have subscribed to a survey and require access to your username or password or have a query about payment of your subscription please contact ASGA and speak to Nikki Wynd.

If you have queries about changes to the surveys, suggestions for improvements, alterations of categories please contact Brad Kitschke.

ASGA CONTACT INFORMATION

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