Executive Summary

THE SPORTS GOODS MARKET IN INDIA

A detailed Federation of Sports and Play Associations (FSPA) research project conducted by EDM Publications.

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Size: Nearly 300 pages of text and charts
120 Topics: The general context – Sports participation – Production and trade in sporting goods – Market size and growth – Analysis of all the major sports categories (except bicycles) – The supply chain at the wholesale and retail levels – Consumers – Marketing – Market entry issues, etc.
Extra: Profiles of 47 companies and listings of more than 150 companies in India
Sources: More than 160 industry executives and government officials + 800 consumers + magazines, newspapers and websites
Collaborators: A senior journalist from SGI Europe and a team of 18 journalists and researchers in seven Indian metropolitan areas.
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With some important adaptations, this exclusive report follows largely the successful and proven methodology and the outline of previous reports compiled since 2004 by the Federation of Sports and Play Association (FSPA), on the sporting goods market in all the European countries, starting with the emerging markets of Eastern Europe, Russia and other parts of the former Soviet Union. These reports have been appreciated by numerous large and small companies in all the segments of the sporting goods market.
Benefits: The main purpose of these reports, has been to assist sporting goods companies in improving their market penetration in every country.

- by recognising their development potential in each market
- by knowing all the aspects of each market, including economic, demographic, consumption and sports participation trends and the structure of the supply chain
- by benchmarking their performance in each country against that of other companies
- by learning more about the major players in each market, including local competitors and local distributors and retailers
- by identifying potential new distribution partners
- by taking inspiration from the strategies and moves of other companies in the region
- by defining the best possible market entry and penetration strategies
- by avoiding possible mistakes

All the country reports that we have published are still for sale, country by country or volume by volume, at reduced prices. Comparable or higher benefits can probably be expected from a better market knowledge about the major emerging markets, which are growing much faster, offering plenty of opportunities for all sorts of brands.

Six years after launching our successful report on the sporting goods sector in Russia, we are tackling here another important emerging sports market with our brand-new report on India. This country has been chosen because it offers much more room for growth than any individual western market and because very little reliable information has been published so far about it.

To help clarify the market situation in India, we have decided that we could not limit ourselves to the consultation of the available documentation and to a vast number of executive interviews, which have required a lot of time and travel expenses. Thus, as we did with the Russian market six years ago, the report on the Indian sporting goods market also contains the findings of a unique consumer survey carried out by our Indian research partners, Indian Business News Agency, among 800 urban consumers in five Indian metropolitan areas. The sample consists mainly of university students and people shopping at sporting goods stores, who constitute the main targets for sports brands, and our analysis delivers a detailed picture of their habits, preferences and spending patterns.

INTRODUCTION TO THE REPORT

Some sporting goods companies have preferred to invest first in the larger and more mature Chinese sporting goods market, but they have often stumbled against strong local competition and some cultural hurdles. The Indian sporting goods market has its hurdles, too. It is currently smaller and less developed, but foreign entrants enjoy the advantage of lower local competition, greater respect for intellectual property rights by local producers and a widespread knowledge of the English language. Furthermore, the Indian sporting goods market may be more rewarding in the longer term because of demographic and other trends.

A figure of just over €500 million a year has been recently aired for the size of the branded Indian sporting goods market, making many executives in the industry wonder whether they should really make a go for it, but this figure doesn’t give an accurate picture of the actual size of the market or its potential. The more thorough research that we have conducted in the past six months indicates that the market is probably five times bigger based on a broader definition, like the one that we adopted for Russia, and that it is growing very fast, partly under the impulse of a strong new nucleus of modern, western-oriented sporting goods retailers who are looking for foreign sports brands as alternatives to the majors.
As a matter of fact, we have run into numerous sporting goods suppliers who have entered the Indian market only in the last few months, anxious to team up with the most promising partners and to plant their seeds early enough to reap the benefits of market entry ahead of their competitors. They have been partly attracted by the sheer size of the Indian population, its rising middle class and the fast-growing economy of the country.

**Growing young and urbanised middle class**
India’s population has tripled in the last few decades, and it should soon overtake the population of China, where the one-family-one-child policy has led to a marked increase in the average age of the people. More than 1.2 billion people live in India, and nearly half of them have less than 25 years of age.

In India, the development of the sports market is being partly fostered by the fact that the new generations are becoming increasingly urban, educated and affluent. It is estimated that the country’s urban population will soar to about 590 million people by 2030.

India’s Gross Domestic Product increased by 10.4% in 2010, according to the IMF, and is likely to rise by another 8.2% in 2011. Some economists predict that, based on the youth of its population and the stimulant of democracy, among other factors, India’s economic growth could lastingly outpace China’s in a few years’ time.

While its benefits have not been evenly spread, with an estimated 40% of the population still living in poverty, this economic growth has given rise to a growing Indian middle class, which is expected to encompass some 580 million people by 2015 – more than the total population of the European Union. Highly attracted by western lifestyles and brands, they are the driving force behind a rise in discretionary spending that has already started to take place in the country, as shown in the first part of our study.

**Weak but rising sports participation**
Unfortunately, only a small proportion of Indians practice sports, mainly due to low disposable income and the shortage of adequate sports facilities. Official sources suggest that, if we exclude physical education in school, only 13.6 million Indians regularly engage in sports in their leisure time – with a preference for cricket, football and badminton, as well as basketball – although other studies seem to point to higher sports participation rates. The Indian government has launched several large-scale schemes for the promotion of sports, but this is hardly a priority in the country’s budget, and the efficiency of the government’s investments is highly debatable.

Nevertheless, our consumer research has shown that many people are interested in purchasing sports clothing and sports shoes if they have the money, even if they don’t practice sports. Growing disposable income and shifts in lifestyles, particularly in urban India, have also begun to change people’s leisure habits and promoting more physical exercise, particularly through running and membership in fitness clubs. Interest in sports is also being bolstered by numerous grassroots initiatives by the major sports brands and by new players in the market such as Decathlon.

**Market layers**
The Indian sporting goods market is relatively small and, like the country itself, it should be split into several layers. The organised segment of the market mainly consists of the major international sports apparel and footwear brands that have moved into the country in the last two decades and spread by opening hundreds of mono-brand stores. Their distribution is complemented by their sales to a few integrated retailers and many more independent stores serviced by wholesalers.
This organised and branded market for sports apparel and footwear has been estimated at about €550 million in 2010 and it has been growing at an annual rate of about 15% in the last years. This segment is uncharacteristically led by Reebok, trailed by Adidas, Puma and Nike, which are all investing heavily in the market, hoping to see major returns in the near future. Unlike the situation in China, the Indian market has not yet seen the emergence of any Indian brand competing directly with these international heavy-weights. The largest Indian brands mostly operate at much lower price levels.

The market for sports equipment is mostly handled by small independent retailers. This business is estimated to be worth about €380 million annually, again with a growth rate in the range of 10% to 15% in the last years. Among the most promising categories are fitness, badminton and tennis, along with some team sports.

Several Indian companies have been stepping up their investments in the equipment market in the last years. Most of them are Indian manufacturers who used to focus on production for international brands, but started investing more in the distribution of their own brands in their own market. Some of them are making use of their Indian sales network to take up distribution deals for foreign brands as well.

Then again, the wider Indian sports market comprises a less organised layer, with thousands of small (and sometimes unregistered) sports and footwear retailers selling mostly Indian brands and unbranded products, mostly from China. This market could be estimated at about €1,650 million, with the inclusion of millions of pairs of cheap sports shoes that cannot used for sports.

**Sports retailing: under construction**

In the coming years, the development of the Indian sports market should be strongly influenced by far-reaching changes in retailing. Currently, Indian retailing as a whole is still ruled by small independent retailers, with less than 10% of all retail trade going through integrated chains. The same applies to sporting goods retailing, with thousands of independent sports and footwear retailers offering sports products. These little outlets are efficient in reaching consumers but they are small stores requiring intensive service, with regular replenishment and often consignment.

They work mainly with regional wholesalers, which play a very important role in the market. These wholesalers, whose way of operating is very special, buy their products firmly from some major sports brands and their distributors.

The growing interest of foreign companies in the Indian sports market has started to alter the traditional retail structure. Although foreign investment rules prevent international retailers from opening multi-brand stores in India, sports brands have hundreds of franchised mono-brand stores around the country.

Furthermore, several Indian retailers have raced ahead to open supermarkets, department stores and other integrated chains before international investment is allowed to pour in. So far, the only large-scale investment in sports retailing has come from the Future Group, owner of Planet Sports, which has 70 stand-alone stores around the country. However, at least three regional sports retailers have mapped out plans to open more stores in the coming years.

Supermarkets and hypermarkets sell certain types of sporting goods in India, carrying western brands in some cases. Cash-and-carry warehouses sell them, too. Various types of sports shoes, including some sophisticated models, are sold by some big footwear retail chains.
Market entry and distribution
The business models followed by foreign sporting goods suppliers to reach out to the retailers vary widely from exclusive deals with some retailers, to licensing agreements, joint ventures, classical distribution contracts and the establishment of company-owned subsidiaries. All these models are analysed in the report through case studies and profiles of different companies.

In general, partnerships with local companies are of the essence when entering the market. They can turn out to be particularly useful in dealing with the numerous complexities of the Indian business environment, including relations with customs authorities and rapidly changing regulatory and taxation issues. In some cases, particularly for sports equipment, Indian manufacturers can offer a good platform to enter the market, provided they have developed their own domestic sales sufficiently.

Low margins
Rising income levels and the growing sophistication of the Indian sports retailing landscape should create more opportunities for foreign sports brands to reach Indian consumers and, just as importantly, help them to operate more profitably, in a market where few foreign entrants have managed to obtain any substantial profits so far. The few companies that are already making a profit from their presence in India are following a rather safe licensing mode or “have learnt the ropes.”

Foreign companies that move into the Indian market are often taken aback by the consumers’ focus on price, even among the middle class. While investments are being made in sports marketing and other types of brand-building strategies, branding is less important for a large chunk of the population at this stage of the country’s development, making it hard to compete against the much cheaper Indian offerings.

At the same time, while staff costs are relatively low and traditional retailers take only a small mark-up, other distribution costs are relatively high, due in part to poor infrastructures and problems with the bureaucracy. Furthermore, while more and more shopping malls are springing up all over the country to accommodate the single-brand stores of the major brands and the more modern multi-sport retailers, many have empty spaces and many of the better locations are saddled with very high rental costs.

Combined with the consumers’ focus on price, which is very often a subject of bargaining inside the store itself, the relatively high cost of doing business in India leads distributors to bargain with foreign suppliers for stronger discounts. In turn, franchised retailers get a lot of help from the brands in marketing, staff training and clearance of excess stock.

The price structure and the distribution structure are amply described in our report, which also compares the prices charged for certain items in India with those charged in China and in Europe.

The report provides detailed analysis of the intricacies of the supply chain in the Indian sports market. Numerous examples and company profiles bring practical insights into the mechanisms of the market.

Prospects
The Indian sporting goods market does not lend itself to a “gold rush” approach. The foreign sports companies that have been most successful in India so far are those that have been willing to take a more educated and involved long-term approach, using a maximum of flexibility to make far-reaching adjustments in their strategy and their offerings for the Indian market. To this end, they have been willing to understand the intricate workings of this
diverse and multi-layered market, and to cope with them. In some cases they have learnt from their own mistakes, but we hope that this report will help our readers to avoid them.

OUTLINE/SUMMARY OF THE REPORT

1. MAIN PURPOSES OF THE RESEARCH PROJECT

   1.1. Providing information about the situation and trends in the market for sports goods in India that may be relevant to foreign companies wanting to enter this market or do more business there in the near, medium-term or long-term future.
   
   1.2. Providing information about the attitudes of Indian distributors, retailers and consumers towards foreign sports goods in general, and British sports goods in particular, in contrast with local brands and products that compete with their offerings.

2. OTHER OBJECTIVES OF THE PROJECT

   2.1. Getting general data on the market for sports goods in India, including general social and economic data such as imports, exports and production statistics for various types of sporting goods.
   
   2.2. Getting general information about the lifestyle trends and preferred sports activities.
   
   2.3. Obtaining information about any local production of sports goods and its possible future evolution.
   
   2.4. Obtaining information about the major local players at the wholesale and retail stages.
   
   2.5. Analyzing the chain of distribution in the sports goods in each region covered by the Project - its structure, mark-ups, promotional facilities used and trends. Providing examples of cases of market entry and market development for some major foreign sports goods industry operators.
   
   2.6. Analyzing the ways in which suppliers go about finding their trading partners in the areas covered by the Project.
   
   2.7. Analyzing the factors that may influence the choice of setting up a wholly-owned sales subsidiary or going through distributors or agents, as viewed also from a historical and geographical perspective, the advantages of covering one single country or more of them through one or more of these types of intermediaries, and of going direct to some key retail partners or to the consumers.
   
   2.8. Obtaining extensive information about the retail structure for sports and leisure goods in each country, Analyzing the various retail channels and their structure, mark-ups, promotional tools used and trends.
   
   2.9. Getting information about the preferences and attitudes of consumers in relation to sports goods in the major urban centers, Analyzing their social, economic and lifestyle characteristics, their purchasing behavior, the factors influencing their purchases of the products covered by the Project, and the places and the frequency of these purchases.

3.0 Determining the most desirable and effective types of actions that the FSPA should undertake to help promote British sports goods in India.
3. SPORTS PRODUCTS COVERED BY THE RESEARCH PROJECT

The Project will be focused in particular on sports footwear, apparel and equipment items that are used in the following types of sports:

3.1 Fitness (includes home fitness, aerobics, strength and cardio training, and Nordic fitness)
3.2 Team Sports (including cricket, football, rugby, hockey, basketball, volleyball, handball, etc.)
3.3 Golf & Racket Sports (tennis, badminton, squash, table tennis)
3.4 Running and exercise walking
3.6 Action & Fun Sports (skateboarding, inline skating, BMX cycling, extreme sports, but not snowboarding, which is linked to the availability of resorts for snow sports)
3.7 Water Sports (swimming, surfing, kite surfing, scuba diving, rowing, canoeing, rafting etc.)
3.8 Hiking and other Outdoor Sports (trekking, climbing, fishing, camping, but not hunting)
3.9 Cue Sports (bowling, darts, archery, etc., but not shooting)

4. TARGETS OF THE RESEARCH PROJECT

4.1. Manufacturers of sports goods in the countries covered by the Project.
4.2. Distributors and agents of sports goods in the countries covered by the Project.
4.3. Retailers of sports goods in the countries covered by the Project.
4.4. Consumers of sports goods in the major urban centers.
4.5. Exhibitors at the Ispo trade show in Munich in February 2011
4.6 Other experts among:
   4.5.1. governmental bodies;
   4.5.2. organizers of exhibitions related to the industry;
   4.5.3. publishers of journals and magazines related to the industry;
   4.5.4. sports associations and similar organizations
   4.5.5. national trade associations;
   4.5.6. local industry consultants, including fashion consultants;
   4.5.7. developers of shopping centers and other retail experts;
   4.5.8. tour operators specializing in sports and adventure travel.

5. RESEARCH INFORMATION SOUGHT

5.1. Social and economic situation in the country since 2005
   5.1.1. basic data on currency exchange rate, type of government, VAT rate etc.
   5.1.2. statistics on the population, its geographical spread, percentage of urban population and list of the cities with more than 100,000 inhabitants
   5.1.3. latest and projected growth rates GDP and GDP per person
   5.1.4. evolution of average wages, working schedules and unemployment
   5.1.5. evolution of life expectancy, smoking and obesity
5.1.6. consumer spending levels and patterns, with details on trends for durable items (automobiles, housing) and fast-moving items including apparel, footwear and other relevant purchases, inflationary trends

5.1.7. factors that are likely to influence the growth and the stability of economic progress and of the consumption of sports goods in the future, including possible political risks, etc.

5.2. Sports participation in the country. Frequent and occasional participation. General participation statistics, where available, and/or participation broken down by groups of sports activities, attempting to use common definitions throughout the continent for each activity, such as walking (exercise walking) or exercising (exercising with equipment), and the level of intensity (at least once a week, once a month, once a year).

5.2.1. General statistics on sports participation, where they exist, possibly broken down by age and gender, providing historical quantitative information wherever possible.

5.2.2. The effects of macro-economic, cultural and other trends on participation in various kinds of sports.

5.2.3. New trends in sports participation, especially by gender. The shifting balance between competitive, team and individual sports, and between urban and outdoor sports. Review of the different categories of sports goods which are declining or growing as a result of these trends in sports participation, popularity or for other (probably lifestyle-related) reasons.

5.2.4. The importance of such sports-related concepts as fitness and wellness and closeness to nature in different segments of the population, partly based on cultural, educational, professional and income characteristics.

5.2.5. Changes in the amount of free time devoted to sports as compared to other leisure activities at different stages of the person’s life.

5.2.6. The most popular spectator sports.

5.2.7. The initiatives of governmental and non-governmental institutions in favour of sports participation

5.2.7.1. Development policies and programs for the construction and management of infrastructures related to sporting activities, including fitness clubs, team sports clubs, tennis clubs, swimming pools, golf courses, ski resorts, etc.. The existence and development of free access policies for these facilities.

5.2.7.2. The importance of sport in the school curriculum. Structure and dynamics of physical education programs for the general population and for future champions.

5.2.7.3. National and local governmental initiatives aimed at fighting obesity, encouraging cycling, promoting healthy lifestyles and raising participation in various kinds of sports, with a focus on those that are also popular in the UK. The share allocated to sports in the national, regional and local budgets and their tendency to increase or to decline.

5.2.7.4. Legislation that hinders or encourages the development of sports or the sale of sports goods in certain countries (import duties and special regulations on packaging, contents of hazardous substances, warranties, etc.).

5.2.7.5. The role and development of tour operators in the organization of hiking expeditions, ski tours, golf holidays and other travel/tourism packages related to sporting activities.
5.3. Trends in manufacturing and trade for sports goods
5.3.1. Statistical information on annual production (where it still exists),
exports and imports of various kinds of sports goods in the European Union as a
whole and in certain countries covered by the Project since 2004, in terms of volume
and value.
  5.3.1.1. Production and export figures, where available and
significant, and their analysis including prospects for future production and interest in
joint venture, distribution and licensing deals
  5.3.1.2. Import figures and their analysis
  5.3.1.3. Description of major national manufacturers and brands of
various types of sports goods, including profiles of selected companies that have a
significant place in the local or international market or an interesting development
strategy

5.4. Market size
5.4.1. Best possible estimates of the size and growth rate of the sports goods
market in volume and value, particularly at the retail level. Evolution since 2004, with
an in-depth analysis based on multiple sources and on different parameters.
5.4.2. The estimated market shares taken by footwear, apparel and
equipment in the national sports goods market. Estimated sales of certain types of
sports goods, with a breakdown for some specific segments and indication of the
market leaders in these product categories.
5.4.3. The estimated market shares taken by the different sales channels.
5.4.4. A review of each of the sports categories covered by the Project, one by
one, with details on the venues, development of participation levels, market size and
growth, major brands, retail development, local champions and marketing actions
(some of this information may be repeated and analyzed from different angles and in
different contexts in subsequent sections):
  5.4.4.1. Fitness (includes home fitness, aerobics, strength and
cardio training, and Nordic fitness)
  5.4.4.2. Team Sports (including cricket, football, hockey, rugby,
basketball, volleyball, handball, etc.)
  5.4.4.3. Golf & racket Sports (tennis, badminton, squash, table
tennis)
  5.4.4.4. Running and exercise walking
  5.4.4.6. Action & Fun Sports (skateboarding, inline skating, BMX
cycling, extreme sports)
  5.4.4.7. Water Sports (swimming, surfing, kite surfing, scuba
diving, rowing, canoeing, rafting etc.)
  5.4.4.8. Hiking and other Outdoor Sports (trekking, climbing,
fishng, camping, but not hunting)
  5.4.4.9. Cue Sports (bowling, darts, archery, etc., but not shooting)

5.5. Structure and development of the chain of distribution for sports goods
at the wholesale stage
5.5.1. Structure and forms of distribution for sports goods (sales subsidiary,
distributorship, agency) that are most common, illustrated by a few significant
examples of successful market penetration by foreign companies.
5.5.2. The development of the various functions and roles assumed by the different types of companies and individuals involved in the supply chain over time (distributors, agents, wholesalers, retailers).

5.5.3. The sales and distribution structures and policies adopted by the major global sports brands (Nike, Adidas, etc.). Data or estimates about their sales, their growth, their market shares or rankings of these brands. Information about their market positioning and their marketing activities.

5.5.4. The sales and distribution structures and policies adopted by other national or international brands in each country or region.

5.5.5. Profiles of some major national and regional distributors and agents of foreign brands. Ways in which they operate. Examples of successful or unsuccessful market penetration by certain brands.

5.5.6. Trends in distributor discounts, wholesalers’ margins and agents’ commissions.

5.5.7. Recent changes in distribution resulting from mergers, acquisitions, divestitures and major changes in trade flows.

5.5.8. Trends in the proportion of re-orders made by retailers for certain sports items and related logistic issues.

5.5.9. Methods of payment adopted by national sports goods vendors and distributors with retailers, and ways of securing the payment of invoices.

5.5.10. The important issue of consignment and its future.

5.5.11. The price structure for sporting goods

5.6. Structure and development of the chain of distribution for sports goods at the retail stage

5.6.1. The growth or decline in total retail sales, and the place taken by sports goods in this pattern.

5.6.2. The general evolution of retailing, including the situation of the open markets and preferences for downtown or suburban shopping. Location of sports goods stores and bases for selection, including trends in the spread between urban and suburban locations for sports goods stores.

5.6.3. Lease rates in urban and out of town locations, the cost of sales personnel and other factors affecting the cost structure, the pricing of sports goods and the profitability of retail operations.

5.6.4. The development of the shopping malls, with a description of some of them, and their impact on the retailing of sports goods.

5.6.5. The development of factory outlets and other ways of clearing stocks of unsold merchandise.

5.6.6. The structure of retailing for sports goods. Estimated shares of different types of retail channels trading in sports goods, including organised and non-organised forms of retailing, as part of the total volume of retail sales of sports goods and the evolution of these shares.

5.6.7. The major retail players in the sports goods market and profiles of some of them. Their estimated market shares. The way in which they position themselves against their competitors in the market. The presence of international retailers or suggested reasons for their absence.

5.6.8. The role and evolution of the integrated chains and of the buying groups.
5.6.9. The role and evolution of supermarkets, hypermarkets and other mass merchants in the sporting goods retail trade.

5.6.10. The challenges to the specialty trade from the fashion sector (fashion boutiques and shoe shops), and the specialty retailers’ reactions.

5.6.11. The role and evolution of the different types of outlets including general specialty sporting goods stores, specialized sporting goods stores (particularly in the outdoor sector), department stores, hypermarkets and supermarkets, single-brand stores and shop-in-shops (company-owned or franchised), etc.

5.6.12. The changing role of mail order houses and electronic commerce, particularly in the area of sports goods.

5.6.13. The role, evolution and scope of the private label programs developed by the retailers and by the buying groups. Price differential with branded products.

5.6.14. Trends in retailers’ mark-ups and pricing for different types of products and in different circumstances. Dynamics in the evolution of average selling prices since 2004 and macro-economic and micro-economic factors influencing these trends.

5.6.15. Equipment rentals.

5.6.16. Programs for the training of store personnel and successful examples of incentives adopted for their performance.

5.7. Consumers’ attitudes towards sports goods

The market for sports goods in terms of the socio-economic characteristics of the population.

5.7.1. Fashion trends affecting the consumption of sports goods.

5.7.1.1. Observation of the sports and fashion items that consumers of the two sexes and of various age, professional and income groups are wearing at school, at work and in other circumstances. Attitudes towards sports clothing and footwear as a fashion item. The use of sports outerwear and sports footwear by consumers for sporting activities, for protection against the cold and as casual sportswear at work or for leisure.

5.7.1.2. Attitudes of consumers towards the sports brands as compared to the fashion and casual brands, and related dynamics. Effects of these attitudes on the growth of certain types of sports goods.

5.7.2. Factors that influence the consumer’s decision-making process as far as sport-related purchases are concerned

5.7.2.1. Personal factors: parents versus children, wives versus husbands, peer pressure, etc..

5.7.2.2. Grounds for consumers’ preferences for certain sports goods among different age group and other socio-cultural-economic groups including the price, the look, the technical features, the brand name and their relative importance.

5.7.2.3. Brand awareness for sports goods brands and banners: The difference in the importance of global and other brands. Big brands versus lower prices for little known brands or unbranded item.

5.7.2.4. Some major sports and fashion icons who appeal to the local youth.
5.7.2.5. The share taken up by sports goods in the total spending budget of consumers as compared to other important items.

5.7.2.6. The importance of the issue of counterfeited products for consumers and the basis of distinctions made by them between authentic and counterfeited products. Estimated extent of the counterfeiting process in the sports goods sector. What the sports brands are doing about this.

5.7.3 The women's market for sports goods

5.8. Marketing
5.8.1. Exhibitions for trade operators and consumers in the country and relative importance of international trade shows.

5.8.2. Other sources of information about the sports goods industry used by trade customers and end users: publications, websites, etc.

5.8.3. Other forms of marketing and communication used for the promotion of sports goods including various types of advertising, sales promotion, direct marketing, merchandising, PR, sports sponsorships, etc.. Actions and methods that have worked well for certain vendors or retailers.

5.8.4. The effect of various forms of discounting.

5.8.5. Evaluation of the overall average IMC (integrated marketing communications) budget required to enter the market in certain cases.

5.9. Ways of entering the market and of optimizing brand penetration
5.9.1. Retailers' demand for certain foreign sports products in little supply and other business opportunities in the country.

5.9.2. Attitudes of those involved in the distribution of sports goods towards foreign products, particularly those of British vendors and those of other European countries.

5.9.3. Main handicaps in doing business in the country.

5.9.4. Ways of finding sports goods suppliers used by distributors and retailers. Problems and practices in establishing contacts with them.

5.9.5. Recommendations about licensing and franchising, or the establishment of a sales subsidiary, a joint venture or another form of foreign direct investment (FDI), as alternatives to the choice of a distributor or of direct sales to retailers as modes for market entry.

5.9.6. Customs and logistics issues.

5.9.7. The role of the British Chambers of Commerce.

5.9.8. Recommendations for programs and measures that the Federation of Sports and Play Industries could undertake to improve the success of British industry in India.
6. OUTLOOK AND FINAL REMARKS

6.1. General Conclusions and Outlook
6.2. Commission History – Illustration of the different stages of development of the research process.
6.3. Methodology – Details on the methods used, the subjects interviewed and the problems encountered in the process.

7. APPENDICES

Appendix 1
List of all the companies, associations and governmental bodies interviewed as part of the Project in the country

Appendix 2
List of other major distributors of sports goods in the country

Appendix 3
List of other major retailers and buying groups for sports goods in the country

Appendix 4
Contact details (name and address) of top government officials responsible for programs aimed at raising sports participation in the country

Appendix 5
Other useful contacts in the country, including lawyers, shipping agents, etc.

Appendix 6
Magazines, newspapers, market studies, websites and other primary sources of market information used in the country report
FSPA REPORT ORDER FORM

THE INDIAN SPORTS GOODS MARKET

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Card Number: ………………………………………………… Security Code: ……………………………
Today’s Date: …………………………… Cardholders’ Signature: ……………………………………………

You will be charged in pounds sterling and you will get an invoice.

Contact the FSPA
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