

MultiSport Research

Market insight & consulting for the global endurance sport industry



Data captured in Jan 2015, 2016, 2017 and now 2018

9 key data points for industry confidence index; shared back with survey respondents

Customer demand

Staffing levels

Annual profits

Competition

Business conditions

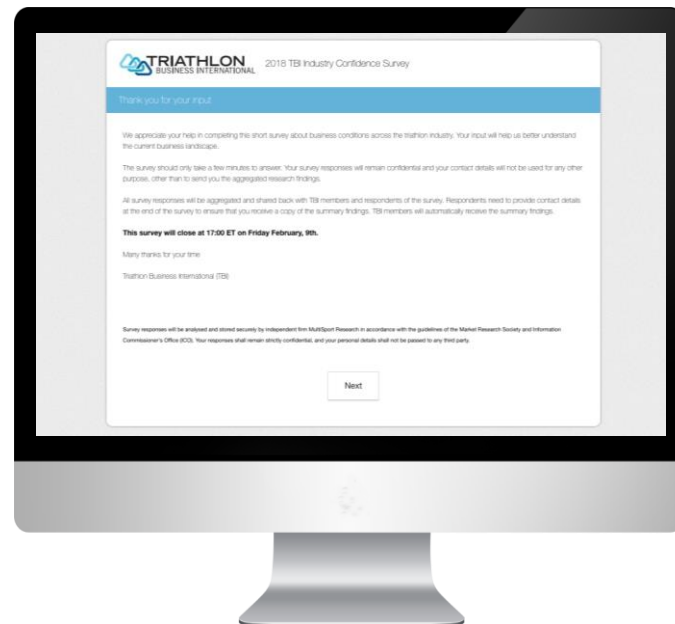
Prices

Household finances

USA economic conditions

Sport of triathlon (participation)

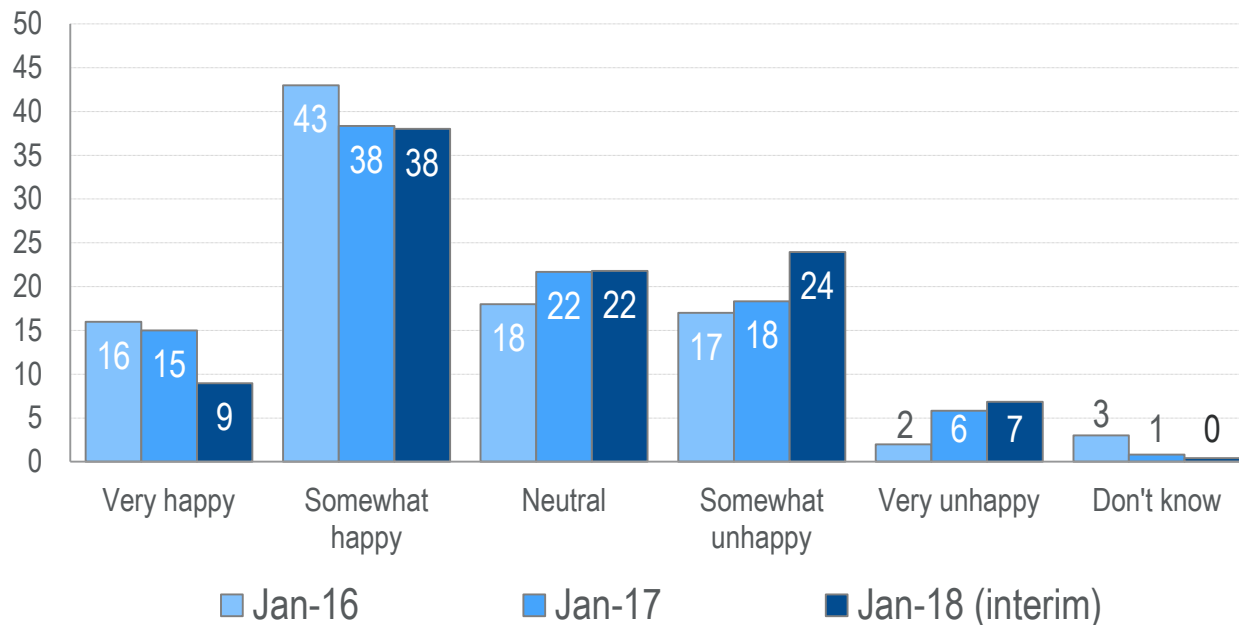
Survey live on bit.ly/TBI_2018
closes at 17:00 ET on Friday February, 9th



How do you feel about current levels of customer demand?

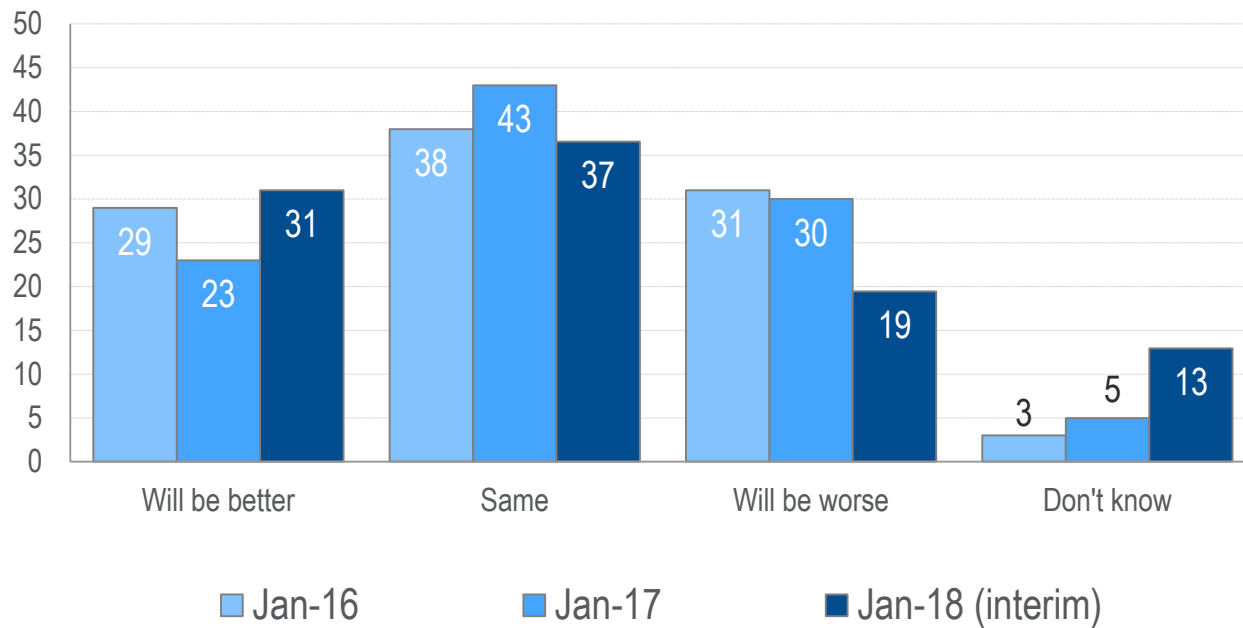
(Demand for respondents' products/services, B2C & B2B as a marker of sentiment)

- Customer demand was the most positive data point in the 2016 TBI Industry Confidence Survey.
- Jan 2016 to Jan 2017: saw drop in those 'happy' with levels of customer demand (59% to 53%). Interim data for Jan 2018 sees the 'current happiness' mood subdued at 47%.
- Respondent(s) indicate mixed fortunes:
 - 'Market seems saturated'
 - 'Crowded'
 - 'Technology demands increasing'



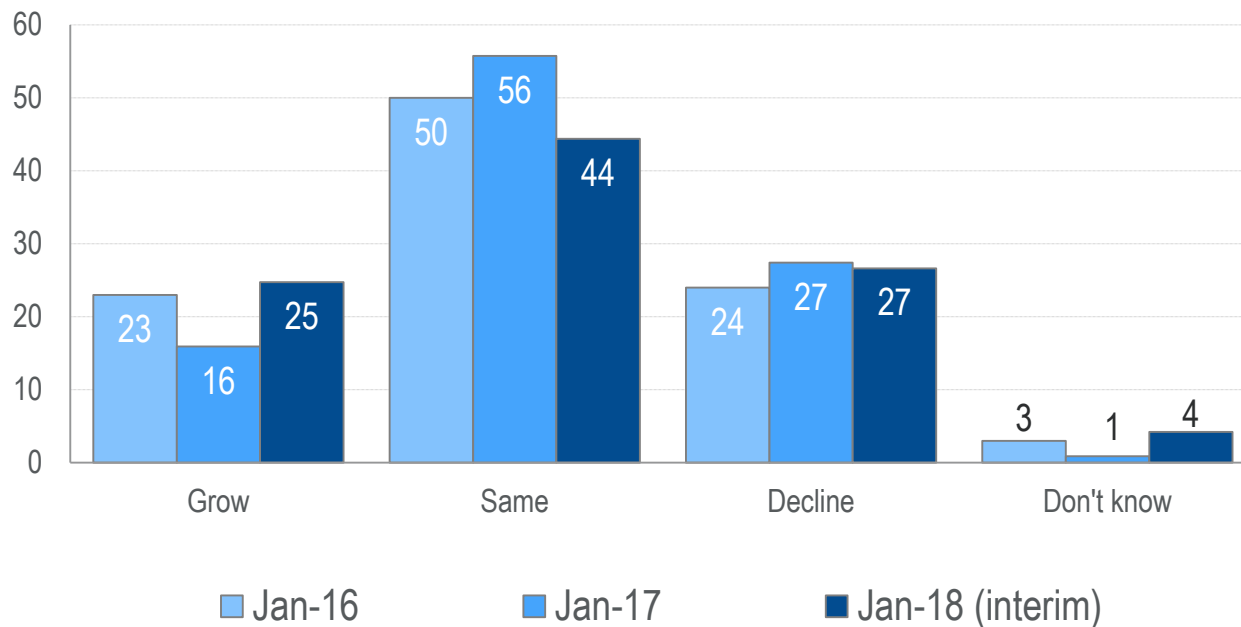
Do you think that business conditions for triathlon over the next 12 months will be better, worse, the same, or not sure in comparison to the past 12 months?

- The sentiment on business conditions was firmly in the bottom half of the ranked industry confidence index this time last year.
- Into 2018, there is a notable pick up in sentiment about business conditions over the next 12 months: 31% state things will be better (vs 23% in 2017).
- Respondent(s) indicate:
 - 'Hope it will be better'
 - 'Younger triathletes coming in'
 - 'Business conditions are what you make them!'



Over the next 12 months, do you feel that the sport of triathlon (participation) in the USA will grow, decline, or stay about the same?

- Following a high-point mood on growth back in 2015 (where 28% expected an uplift in participation) the mood on tri participation dropped in 2016 & 2017.
- In Jan 2018, as with expected business conditions over the next 12 months, there is a pick up in sentiment: 25% expect triathlon participation to grow (vs 16% in 2017).
- Respondent(s) indicate:
 - 'Feels like more folks are talking about [tri] again'
 - '[Need] passionate, grass roots support and raving fans to spread the word'



MultiSport Research

specialist research & consulting for the international endurance sport industry



At MultiSport Research, our consulting and insight services are: independent, vigorously researched & strictly confidential. We offer five core services:

Category & Market Quantification – modelling and quantifying value; analysis of athletes & sports participation by category

Consumer Insight – specialism in quantitative and qualitative methods; from athlete surveys to interviews and focus groups

Benchmarking & Competitor Analysis – tracking brand price points, social media activity and competitor brand positioning

Event Services – independent analysis of athletes, spectators, sponsorship effectiveness and event economic impact

Consulting – strategic advice; target searches for mergers & acquisitions; channel introductions; and marketing support

Thank you!

Thank you very much for your time.

For any questions or follow up requests, please contact:

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