

# Sports Clothing and Footwear - UK - September 2009

Report Price: £1500 / \$3000 / €2250

## What is this report about?

Sportswear has been through the boom times of the 1990s and is now suffering from a severe bout of consolidation. With many mainstream brands labelled as 'chav fashion', its acceptance as everyday casual clothing is facing a major challenge. In a polarising market, splitting between performance sportswear, casual fashion and comfort clothing those left in the middle in are a very precarious situation.

## Key issues covered in the analysis

- By 2014, the number of 25-34 year olds will have grown by more than 12%. One of the most active groups when it comes to sport, a key focus for NPD should be the group's keen interest in sport as 'me' time rather than as a group activity. Cycling, jogging and aerobic/keep fit are particularly popular.
- Almost 17 million adults only buy sports clothes to replace worn out items. Greater innovation in fashionability and technical performance as well as better in-store promotion of new ranges are needed in this sector.
- Spending on trainers is in decline. But one-off and exclusive ranges in co-operation with brands is persuading customers that sports footwear is a product worth paying extra for.
- The sports casual look appears to have lost some of its appeal among younger consumers: a quarter of all consumers only wear sports clothing for sports participation, rising to more than 40% among 16-24 year-olds. Injecting greater fashionability to ranges and rebuilding sportswear's appeal through greater design differentiation is essential.
- Sports brands and retailers need to develop more entry-price ranges to defend share: more than 7 million adults, especially the middle-aged market, buy sports clothing from value and grocery retailers.
- Cross selling between sports and regular fashion is crucial to building sales as more than 9 million adults like to mix and match.

## Scope of the report

The market for sportswear includes:



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