

Sports Goods Retailing - UK - May 2010

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What is this report about?



This report assesses the pace and direction of these trends, how they interact with other factors impacting on the industry and what they are likely to mean for its prospects of future development and growth. In so doing, it tests the hypothesis that “the increasing focus on active lifestyles in the build-up to the 2012 Olympics is creating an opportunity for sports goods retailers to shift their focus back away from fashion-buying towards the participation-driven sector of the market.”

What have we found out?

- Despite the recession, and against a background of aggressive discounting, the sports goods retail market's value has remained above 2006 levels, at an estimated £5,646 million in 2010 (compared with £5,600 in 2006). It is expected to resume 4-6% annual growth from 2011.
- Parents of under-15s are 50% more likely than non-parents to have bought sports equipment, clothing or footwear in the last 12 months, but this drops off through the secondary school years.
- The sports goods market remains fashion-driven, dominated by clothing and footwear, which account for 75% of market value. Both these segments have held up well during the recession, while equipment sales slipped 12% year-on-year in 2009.
- The number of independent sports shops in the UK has fallen from 4,000 to around 1,000 in recent years. There are still more independent outlets than Sports Direct, JJB Sports and JD Sports combined, but in value terms the independents are estimated to command only around 10% of the market.
- Consumers who browse online but buy in-store are typically younger and more likely to be female, whereas older, male sports participants prefer to try things out in-store but then go online to buy them.
- A fifth of consumers overall say they would happily buy sportswear from fashion clothing shops such as Next or Topshop – this is the case for 23% of women, compared with 15% of men.

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