Sports Goods Retailing - UK - May 2011

Report Price: £1500 / $2310 / €1793

What is this report about?

The UK sports goods retailing market has in recent years benefited from rising levels of sports participation and regular one-off boosts to trade from major events such as football's FIFA World Cup. Alongside this, the continued contribution of fashion and general leisurewear purchasing has also helped insulate sales against the worst of the recent recession.

What have we found out?

- The sports goods retailing market has recovered from the recession faster than anticipated, with World Cup buying and a spike in recession-deferred purchases of higher-ticket items in the equipment sector enabling the £6 billion barrier to be breached in 2010.
- Although all market sectors saw an extension in replacement buying cycles during the recession, fashion and general leisure purchases offered the clothing segment a greater degree of insulation than was enjoyed by either its footwear or equipment counterparts. As a result, clothing now commands the majority share of consumer expenditure in this market.
- The recent upward trend in the number of Britons exercising through sport has stalled and growth in sports club membership – which may be expected to deliver more committed players and, consequently, buyers – has slowed similarly.
- Independent retailers continue to account for around 40% of the UK's sports goods retail outlets, but are estimated to generate only about 10% of revenue. Sports Direct continues to dominate the mainstream, multiple sector and its position is set to strengthen further over the short term as JJB Sports – its main competitor on participation goods – looks to close 89 outlets by April 2013.
- JJB's core demographic is older and with a heavier male bias than that of Sports Direct, but not to the extent of the independent sector, which may be well placed to attract the 'grey market', which values the old school customer service approach these retailers typically offer.
- Men are significantly more likely than women to wear particular brands for particular sports, but would be less likely to buy a brand they didn't know on the recommendation of a retailer. Customers of non-specialist stores are most likely to take brand advice from shop staff, suggesting that assistance is now more valued at entry rather than expert level, where participants have the knowledge to research products themselves online.

If you have any questions or require further information, send an email to **oxygen@mintel.com** or call one of our regional offices:

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