UK Sports Clothing & Footwear

Published on May 2007

Report Summary

Sports clothing and footwear has been an established part of the general apparel market for 20 years. The UK market, worth £4.25bn in 2006 at retail selling prices (rsp), has inevitably shown signs of saturation after such a long period. As a result, between 2002 and 2006, market growth was 4.9%.

A complex relationship between fashion and function characterises the sports clothing and footwear market. Accordingly ' although there are lucrative niches for solely functional apparel, particularly for golf, football and other team sports ' the market is dominated by multipurpose leisurewear that may never see a playing field (e.g. tracksuits, trainers, shorts and T-shirts). Furthermore, the popularity of keeping fit by joining a gym or jogging has increased demand for multipurpose products. As such, it is very difficult to distinguish specific sectors for fashion and function. Therefore, for the purpose of this Key Note Market Report, the market is split into a sports clothing sector and a sports footwear sector, with each sector being split into subsectors defined by the sport for which the type of clothing/footwear was originally designed. Although the items in these subsectors may not
be used functionally at all, these distinctions are the only ones that can feasibly be made.

Sports clothing was worth £3bn at rsp in 2006 and footwear (predominantly trainers) was worth £1.25bn at rsp in 2006, although, in practice, consumers buy into major brands that produce strong ranges of all types of sports clothing and footwear. Nike Inc is the clear UK and world leader, followed by adidas Group, which now also owns Reebok, another global brand. These two global giants are much larger than the UK's leading competitors, which include Pentland Brands, Umbro and Hi-Tec. The globalised marketing of Nike, adidas, Reebok and other sportswear brands fits in with globalised production. Domestic manufacture of sportswear has withered away in Europe, replaced by imports from the Far East (particularly the People's Republic of China and Vietnam).

Although some sportswear lines have maintained their pricing premiums, such as football-club replica shirts and true `performance' sportswear, discounting has been boosted by the battle for market share between the giant, global brands and also at the retail level. Sports World (the main retail fascia of Sports Direct International PLC), which advertises prices `up to 80% off on leading brands', has grown rapidly and the company was partially floated in February 2007. A Key Note consumer survey ' which asked a representative sample of adults where they purchase sports items ' identifies this intense competition for retail market share: while 41.6% of respondents had bought a sports item from JJB Sports, the market leader, in 2006, 25.1% had bought from a Sports World outlet. Supermarkets (36.3%) and online traders (27.7%) have added to the competition.

The next 5 years (2007 to 2011) should see marginally better growth for sportswear, with prices solidifying. However, dramatic growth is unlikely, given the `greying' of the UK population. The run-up to the London Olympics in 2012 should renew interest in a wider number of sports, with a knock-on effect on demand for functional sports apparel.

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