**Sporting Goods Market 2018**

**Retail Sales Struggling to Escape Red Numbers**

* As the robust economy benefits many other retail sectors, revenues for sporting goods stores (NAICS code: 45111) continue to decline, with 2017’s total of $44.66 billion 5.9% less than 2016’s total of $47.45 billion.
* The same trend held true during Q4 2017, despite the strong holiday shopping season, as revenues decreased 3.5% to $12.46 billion from Q4 2016’s $12.91 billion.
* For Q1 2018, revenues did improve, declining 3.3%, to $9.25 billion, from Q1 2017’s $9.57 billion, which had decreased 7.0% from Q1 2016’s $10.29 billion.

**Total Retail and Sporting Goods Sales, Q4 2017–April 2018**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Month | 2016 | 2017 | % Change | 2018 | % Change |
| Q4 Total | * $12.91 B | * $12.46 B | * -3.5% | * --- | * --- |
| January | * $3.07 B | * $2.90 B | * -5.5% | * $2.68 B | * -7.6% |
| February | * $3.20 B | * $2.97 B | * -7.2% | * $2.92 B | * -1.7% |
| March | * $4.03 B | * $3.70 B | * -8.2% | * $3.65 B | * -1.4% |
| Q1 Total | * $10.29 B | * $9.57 B | * -5.1% | * $9.25 B | * -3.3% |
| April | * $3.75 B | * $3.56 B | * -5.1% | * $3.48 B | * -2.2% |

US Census Bureau, July 2018

**Sector Insights**

* According to analysis from The NPD Group, February–April 2018 activewear sales were largely unchanged. Low single-digit increases in men’s activewear offset low single-digits decline in women’s activewear.
* Performing much better during the February–April 2018 period was US team sports equipment, with sales increases in the mid-single-digits. Composite baseball bats and golf equipment were largely responsible, with retiring Baby Boomers drove golf sales.
* Increases in the high single-digits for women’s athletic footwear primarily accounted for low single-digits increases in dollar and unit sales of all athletic footwear during the February–April 2018 period.

**Athletic Footwear Sales, 2017**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| All Categories | | | Sports Leisure | | | Performance | | |
| Sector | Sales | % Change | * Sector | * Sales | * % Change | * Sector | * Sales | * % Change |
| Total | $19.6 B | +2.0% | * Total | * $9.6 B | * +17.0% | * Total | * $7.4 B | * -10.0% |
| Women | --- | +5.0% | * Running-inspired | * --- | * +39.0% | * Running | * --- | * -7.0% |
| Men | --- | +1.0% | * Casual athletic | * --- | * +24.0% | * Training | * --- | * -15.0% |
| Children | --- | +1.0% |  |  |  |  |  |  |

The NPD Group, February 2018

**Retailers’ Race Card**

* Dick’s Sporting Goods faces a very competitive market, as many specialist and non-specialist stores are more modern and appealing than some of Dick’s older stores, which resulted in a 2.5% decrease in same-store sales during Q1 2018.
* As #2 on *Sports Insights*’ The Power Retailers 2018 list, Amazon has partnered with Nike, Under Armour and Hanesbrand, among others, to grab a larger share of the apparel and footwear markets, especially among adults 18–29.
* Recreational Equipment, Inc. (REI) (#8 on the *Sports Insights*’ list) is a co-op-based business with more than 17 million members and known for its support of social and environmental causes. It distributed $196.3 million in 2017 member dividends.

**Top 10 Sporting Goods Retailers, 2017**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Store | Revenues | Stores | Store | Revenues | Stores |
| #1: Dick’s Sporting Goods | $8.59 B | 721 | #6: Hibbett Sports | $968.2 M | 1,079 |
| #2: Amazon | $6.50 B | 0 | #7: Academy Sports + Outdoors | $4.80 B | 244 |
| #3: Foot Locker | $7.80 B | 2,725 | #8: REI | $2.62 B | 151 |
| #4: Scheels All Sports | NA | 27 | #9: Modell’s Sporting Goods | NA | 158 |
| #5: Bass Pro Shops/ Cabela’s | NA | 177 | #10: Gander Outdoors | $38.2 M | 72 |

Based on analysis of *Sports Insights*, May 2018 issue NA: privately-owned businesses, revenues not disclosed

**Participation Rates Essentially Unchanged**

* Physical activity, whether athletics, organized sports or fitness, drives sporting goods sales and, according to the Physical Activity Council, 72% of the US population six of age and older were active during 2017, but this was essentially unchanged from 2016.
* Fitness sports/activities continue to have the largest participation rate during 2017, or 63.8% of the population 6 and older; outdoor sports, at 49.0% remained #2, but was flat; and winter sports had the largest gain, or 2%, from 2016, to a total rate of 7.7%.
* At 35.4%, Millennials were active to a healthy level, the best participation category; followed by Gen Xers, 35.0%; Baby Boomers, 26.5%; and Gen Zers, 26.3%.

**Physical Activity, by Activity and Generation, 2017**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Gen Z | Millennials | Gen X | Baby Boomers |
| Individual sports | * 45.8% | * 42.4% | * 34.4% | * 23.8% |
| Racquet sports | * 18.7% | * 18.5% | * 11.3% | * 6.3% |
| Team sports | * 57.1% | * 29.5% | * 14.5% | * 5.2% |
| Outdoor sports | * 60.2% | * 57.8% | * 50.6% | * 38.9% |
| Winter sports | * 13.3% | * 11.6% | * 6.7% | * 2.9% |
| Water sports | * 14.9% | * 18.0% | * 12.9% | * 8.4% |
| Fitness sports | * 50.8% | * 66.5% | * 65.4% | * 59.7% |

Physical Activity Council, 2018

**Sporting Goods Shopper Demographics**

* According to The Media Audit’s 2018 Rolling Aggregate Survey of 58 GMAs and representing more than 120 million adults 18+, 59.4% of men and 40.5% of women shopped at a sporting goods store during the past 4 weeks.
* The largest age group was adults 35–44, at 21.7%, with adults 25–34, second, at 19.7%; adults 55–64, third, at 13.3%; and adults 45–49, fourth, at 11.7%; however, they had the highest index, at 129.
* Ethnically, Caucasian Americans were the largest group of sporting goods shoppers, at 64.6%, with Latino Americans, second, at 19.4%, and Asian Americans, third, at 7.2%. They had the highest indices, however, or 117 each, with Caucasian Americans 100.

**Men and Women 18+ Who Shopped at a Sporting Goods Store**

**During the Past 4 Weeks, by Household Incomes, 2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Range of Household Income | Men 18+ | | Women 18+ | |
|  | * Percent | * Index | * Percent | * Index |
| $15,000–$24,999 | * 3.8% | * 51 | * 4.1% | * 41 |
| $25,000–$34,999 | * 5.8% | * 64 | * 7.1% | * 59 |
| $35,000–$49,999 | * 9.5% | * 70 | * 12.8% | * 81 |
| $50,000–$74,999 | * 18.9% | * 96 | * 22.1% | * 108 |
| $75,000–$99,999 | * 19.7% | * 118 | * 18.9% | * 132 |
| $100,000–$149,999 | * 23.3% | * 149 | * 17.5% | * 160 |
| $150,000–$199,999 | * 8.4% | * 158 | * 7.1% | * 180 |
| $200,000–$299,999 | * 4.4% | * 161 | * 3.9% | * 207 |
| $300,000+ | * 2.3% | * 136 | * 1.8% | * 190 |
| $500,000+ | * 1.2% | * 136 | * 0.7% | * 177 |
| $1,000,000+ | * 0.6% | * 170 | * 0.2% | * 161 |

Based on The Media Audit’s February 2018 Rolling Aggregate Survey

**Additional Analysis**

Two other tables of data from The Media Audit’s 2018 Rolling Aggregate Survey should be useful to share with your prospects and clients.

**Men and Women 18+ Who Shopped at a Sporting Goods Store**

**During the Past 4 Weeks, by Occupation, 2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Occupation | Men 18+ | | Women 18+ | |
|  | * Percent | * Index | * Percent | * Index |
| White collar workers | * 46.8% | * 138 | * 41.0% | * 146 |
| Professional/Technical | * 22/3% | * 137 | * 19.1% | * 146 |
| Proprietors/Managers | * 19.1% | * 148 | * 13.3% | * 167 |
| Retired | * 12.9% | * 65 | * 12.0% | * 57 |
| Clerical/Sales workers | * 10.7% | * 113 | * 15.7% | * 118 |
| Blue collar workers | * 10.5% | * 109 | * 5.8% | * 105 |
| Business owners/Partners/Corporate officers | * 9.0% | * 149 | * 6.1% | * 180 |
| Homemakers | * 0.5% | * 73 | * 11.7% | * 103 |

Based on The Media Audit’s February 2018 Rolling Aggregate Survey

**Men and Women 18+ Who Shopped at a Sporting Goods Store**

**During the Past 4 Weeks, by Heavy Media Exposure, 2018**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Heavy Media Exposure | Men 18+ | | Women 18+ | |
|  | * Percent | * Index | * Percent | * Index |
| Radio (180+ minutes avg. day) | * 27.3% | * 124 | * 27.0% | * 130 |
| TV (300+ minutes avg. day) | * 22.3% | * 90 | * 24.0% | * 81 |
| Newspaper (60+ minutes avg. day) | * 26.6% | * 134 | * 23.0% | * 138 |
| Outdoor (200+ miles avg. week) | * 41.4% | * 133 | * 33.1% | * 143 |
| Direct mail (75%+ read weekly) | * 33.4% | * 124 | * 40.9% | * 115 |
| Internet (180+ minutes typical day) | * 40.3% | * 101 | * 44.8% | * 109 |

Based on The Media Audit’s February 2018 Rolling Aggregate Survey

*Sources:* US Census Bureau Website, 7/18; The NPD Group Website, 7/18; Retail Dive Website, 7/18; *Sports Insights* Website, 7/18; Physical Activity Council Website, 7/18; The Media Audit Website, 7/18.

*Updated*: July 2018

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