

The image shows the front cover of a market research report. The background is a vibrant red. In the upper left corner, there's a vertical white line followed by the text "EDM Publications". To its right is the "SGI Europe" logo, which consists of a blue square containing stylized white letters "S", "G", and "I" stacked vertically, with the word "Europe" written below it. The main title, "The Sports Goods Market in China", is centered in a large, bold, black font. Below the title is a graphic of a map of China, where the landmass is outlined in white and filled with numerous small white icons representing various sports items such as basketballs, soccer balls, tennis rackets, golf clubs, skis, and bicycles. Behind the map, a faint, larger-scale version of the Chinese national flag (red field with five golden stars) is visible. At the bottom left, the website "www.edmpublications.com" is printed in white. At the bottom right, there is a white banner area containing the text "in partnership with:" above two logos: "ISPO" (with a colorful geometric icon) and "EMILYON business action" (with a red and white logo).

A new research report by EDM Publications, in partnership with ISPO and EMLyon

- Release date:** January 2015
- Size:** 330+ pages of text and charts.
- Main Topics:** Introduction – Demography, Society and Economy – Sports Participation – Market Size, Dynamics and Issues – Analysis of Selected Sports Categories - Distribution – Sporting Goods Retailing – Consumer Behavior - Prospects
- For each category:** Infrastructure – Participation - Market size and development - Market leaders - Specialist retailers - Marketing (trade fairs, specialist publications, etc.)
- Extra:**
- Comprehensive listings of all people interviewed in the course of the research (brands, distributors, retailers, officials, etc.), other distributors and a selection of important retailers
 - 58 company profiles
 - A consumer survey whose raw data are available separately
- Methodology:** A combination of primary research and interviews with key players to produce quantitative and qualitative information on the market. With some important improvements, this exclusive report largely follows the successful and proven methodology and the outline of previous reports compiled since 2004 by the editorial teams of SGI EUROPE and THE OUTDOOR INDUSTRY COMPASS on the sporting goods market in all the European countries.
- Sources:** 175+ industry executives and government officials interviewed + about 75 store managers, consultants and other knowledgeable people + lots of magazines, newspapers and websites
- Authors:** Two senior journalists for SGI Europe, in cooperation with local researchers
- Project partners:** ISPO (www.ispo.com) and EMLyon (www.em-lyon.com)
- Price:** Prices in euros (and before VAT) in the chart below. Contributors to this research project get 30% off. Subscribers to Sporting Goods Intelligence Europe and The Outdoor Industry Compass get 40% off.

	Price	-40% for subscribers	-30% for contributors
Hard copy	2,600	1,560	1,820
Soft copy (pdf - brand licence)	3,000	1,800	2,100
Consumer survey raw data	1,000	600	700

- Place your order:** You can either use the order form on the last page, or our online order form at www.edmpublications.com/ordernow, or e-mail us at info@edmpublications.com
- Benefits:** All our market research reports are mainly intended to help sporting goods companies to improve market penetration in every country in various ways:
- by recognizing their development potential in each market
 - by knowing all the aspects of each market, including economic, demographic, consumption and sports participation trends and the structure of the supply chain
 - by benchmarking their performance in each country against that of other companies
 - by learning more about the major players in each market, including local competitors and local distributors and retailers
 - by identifying potential new distribution partners
 - by taking inspiration from the strategies and moves of other companies in the region
 - by defining the best possible market entry and penetration strategies
 - by avoiding possible mistakes.

THE FIRST MARKET STUDY ON CHINA

BY EDM PUBLICATIONS

China has become the second-largest sporting goods market in the world, after the U.S., but for many sports brands, it's not even the third-largest one. This is because it's a very complex market. Western brands are gaining market shares thanks to superior products as well as superior market knowledge and good local partners.

After covering all the European countries and all the other BRICs, SGI Europe is putting out the first comprehensive report on the Chinese sporting goods market. Compiled by a team of seasoned international and local researchers and with the collaboration of ISPO, it has been released in January 2015.

This report of more than 330 pages is full of facts and figures that can help sports brands to better penetrate the Chinese sporting goods market. It is largely based on documentary research and on interviews with nearly 250 sources, including more than 100 executives and more than 100 store managers.

The report includes 58 company profiles of major players in this market, and also features the conclusions of a unique survey of more than 500 consumers. It provides contact information for more than 200 potential distribution and retailer partners.

In the next pages of this executive summary, you will find:

- the detailed outline of the report
- the list of the 58 company profiles
- the list of the charts by chapter
- the questionnaire that was used for the consumer survey
- some of the main conclusions of the report
- last but not least, our order form on the last page

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B.C. Sports Group	Life Fitness	Shenzhen Himalaya
Belle International	Li-Ning	Shu Hua
Blue Ice	Lotto	Soccerinworld.com
Burning Ice	Mass Sport City	Sportmaster
Camel Outdoor	Max Sport	Sports Depo
China Dongxiang	Metro	Technogym China
China Hongxing (Erke)	Mizuno	Toread
Decathlon China	Mobi Garden	Tutwo
Fire-Maple	New Balance China	Under Armour
Flyke	Nike China	Warrior
Full Jet	Ozark	Wild Rampage
Good Family	Peak Sport	Xebio
Hosa Fitness	Pou Sheng	Xidelong
Impulse	Power Jump	Xtep
Intersport	Precor	
Jack Wolfskin China	Puma China	

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What is your favorite brand?
If you had extra money, what would you spend it on?

THE QUESTIONNAIRE FOR THE CONSUMER SURVEY

What is your gender?

- Male
- Female

What is your age?

- ≤17
- 18-25
- 25-30
- 31-40
- 41-50
- 51-60
- > 60

Please choose your education

- High school / professional high school
- College
- University
- Master degree and above
- Others

How often do you participate in sports activities?

- Once or more a week
- One to three times a month
- One to six times a year
- Not regularly

Do your family and friends participate in sports ?

- Parents
- Children
- Friends

How much do you spend on sports products every year?

- ≤1,000 RMB
- 1,000-2,000 RMB
- 2,001-5,000 RMB
- 5,001-10,000 RMB
- > 10,000 RMB

Please rank on what product you spend more money? (1=the most)

- Shoes
- Clothing
- Equipment

If you had extra money, what would you spend it on ?

- Traveling
- Clothes
- Electronics
- Cars
- Others

Where do you buy your sports products?

- Mono-brand store in mall
- Mono-brand store in street
- Multi-brand store and specialized dealer
- Low-budget market
- Factory outlets or wholesale market
- Online shop (Internet sale)
- Others

How important are the following factors in your sports products purchase (Very important Important Neutral Not very important Not important at all)?

- Image of brand
- Price-quality relationship
- Quality & Function
- Price
- Design & Color

What sports do you practise?

- | | | |
|----------------|-------------|----------------|
| - Basketball | - Badminton | - Skiing |
| - Football | - Running | - Skating |
| - Volleyball | - Yoga | - Outdoor |
| - Table Tennis | - Golf | - Water sports |
| - Triathlon | - Hunting | - Squash |
| - Boxing | - Fitness | - Others |
| - Tennis | - Diving | |

Which do you prefer to purchase, Chinese sports brands or foreign sports brands?

- Chinese Brand
- Foreign Brand

What is your favorite brand? Please rank the top 5.

- | | | |
|-----------|----------------|---------------|
| - Nike | - Kappa | - Converse |
| - Adidas | - 361° | - New Balance |
| - Puma | - Peak Sport | - Umbro |
| - Reebok | - Xidelong | - Xtep |
| - Anta | - Qiaodan | - Lotto |
| - Asics | - Erke | - Mizuno |
| - Li-Ning | - Under Armour | |

Why do you prefer Chinese/Foreign Brand?

- Price
- Quality and function
- Others

Do you buy sports products for sports activities or just for daily use?

- Sports
- Daily use

What are the factors will help you to make the decision of purchase sports products?

- Brand image or product advertisement
- Test result or the product gets awards

- The consultation of friends or club members
- The consultation in the shop/store
- Research in Internet
- After-sales service
- Image of the shop
- Others

If you replied that you practice team sports...Which of these brands do you know, please rank the top 5.

- | | | |
|----------|--------------|------------|
| - Nike | - Li-Ning | - Kipsta |
| - Adidas | - Peak sport | - Reebok |
| - Puma | - Qiaodan | - Joma |
| - Umbro | - Pro Touch | - Diadora |
| - Anta | - Lanhua | - Carsilia |
| - Mizuno | - Spalding | - Wilson |
| - Lotto | - Mikasa | |

If you replied that you practice action sports... Which of these brands do you know, please rank the top 5.

- | | | |
|--------------|------------|---------------|
| - Quiksilver | - Globe | - Roces |
| - Billabong | - Element | - Rollerblade |
| - Roxy | - Vans | - Converse |
| - Volcom | - Rip Curl | - Fallen |
| - Burton | - O'Neill | - DC |

If you replied that you practice running... Which of these brands do you know? Please rank the top 5.

- | | | |
|-----------|---------------|-------------|
| - Nike | - 361° | - Brooks |
| - Adidas | - New Balance | - Asics |
| - Puma | - Mizuno | - Pro Touch |
| - Li-Ning | - Kalenji | - Skechers |
| - Anta | - Newton | - Polar |
| - Xtep | - Saucony | |

If you replied that you practise outdoor activities.... What belongs to outdoor activity in your opinion?

- | | | |
|-----------------------|-----------------------|----------------|
| - High mountaineering | - Hiking + Trekking | - Fishing |
| - Low mountaineering | - Skiing | - Traveling |
| - Rock climbing | - Kayaking | - Horse riding |
| - Camping | - White water rafting | - Others |
| - Mountain biking | - Trail Running | |
| - Road biking | - Hunting | |

Why do you love outdoor activities?

- I love the nature
- I love mountains
- I like to do something for health
- I am a citizen and I need fresh air
- Others

How do you choose your traveling destinations?

- Landmark and historical place
- Nature and national parks
- Climbing and mountaineering destination
- Looking for cities with excellent shopping location
- Others

What famous outdoor brands do you know? Please rank the top 10.

- | | | |
|-----------------|---------------------|--------------|
| - Aigle | - The North Face | - Acome |
| - Arc'teryx | - Kolumb | - Vaude |
| - Black Tak | - Mammut | - Salewa |
| - Columbia | - Mobi Garden | - Millet |
| - Haglöfs | - Northland | - Fjällräven |
| - SnowWolf | - Ozark | - Carava |
| - Bigpack | - Life Unlimited | - Marmot |
| - High Rock | - Mountain Hardwear | - Quechua |
| - Haski | - Toread | - McKinley |
| - Jack Wolfskin | - Patagonia | - Oakley |
| - Kailas | - Scaler | - Coleman |
| - KingCamp | - Sevlæ | - Suunto |
| - Kolon Sport | - Shehe | - Salomon |
| - Timberland | - Telent | |
| - L.L. Bean | - Lafuma | |

What famous outdoor shoes brand do you know? Please rank the top 5.

- | | | |
|---------------|------------|------------|
| - Meindl | - Scarpa | - WTiger |
| - Salomon | - Lowa | - Hanwag |
| - TrekSta | - Keen | - Adidas |
| - Garmont | - Vasque | - Crispi |
| - Ecco | - Dolomite | - McKinley |
| - Zamberlan | - Clorts | - Quechua |
| - La Sportiva | - Asolo | |
| - HiNature | - Tecnica | |

What famous backpack brands do you know? Please rank the top 5.

- | | | |
|----------------|-----------------|-------------|
| - Deuter | - Onepolar | - Doite |
| - Granite Gear | - Acome | - Karrimor |
| - Bigpack | - Vaude | - Arc'teryx |
| - Berghaus | - Kelty | - McKinley |
| - Osprey | - Mountainsmith | - Quechua |
| - Hard Bone | - Kailas | |
| - Gregory | - Lowe Alpine | |

SOME OF THE MAIN CONCLUSIONS

The NPD Group estimates that the Chinese retail market reached the equivalent of 198 billion yuan renminbi or \$31.9 billion in 2013, which was an increase of 19 percent compared with the previous year. The figure covers retail sales of all sports and sports-inspired products and brands (as perceived by consumers) in all locations. The estimate points to the buoyancy of the Chinese market, despite the pressure that has been reported by some major market players and the predicted slowdown in the growth of the Chinese economy.

We are not disclosing here the numerous facts and figures included in the report about the size and growth of specific categories of the market and its leading players. This is only a very brief summary of some of the topics and trends under discussion.

- The surge of the Chinese economy, the rise of the middle class, urbanization and abundant investments by sports companies to build up supply around the country in the last two decades have turned China into the second-largest global market. Despite the widely publicized inventory issues of the last three years in the sports apparel business, China remains a buoyant growth market, with sales advancing at ample double-digit rates in many sports categories.
- The latest figures by the International Monetary Fund suggest that China has become the largest economy in the world this year, slightly ahead of the United States on the basis of purchasing power parity. China's GDP nearly doubled in the five years to 2012 (although GDP per capita remains at about 15% of the level in Germany). China's economic growth is predicted to slow down in the coming years, but the government has embarked on a gaggle of reforms that should help to achieve more sustainable increases in disposable incomes – with less focus on sheer GDP growth and more on other values that should benefit consumption of sports products.
- Chinese consumption has already been transformed in the last decades but it still made up less than 35% of China's GDP last year (roughly half of the level in the United States). The government's plans call for this rate to increase to 45% by 2020: While the economic expansion of the last decades has come mostly from exports and infrastructure investments, the latest government reforms are chiefly meant to support growth through consumption – including concrete stimulants for the sports business.
- Urbanization is another constant stimulant for the Chinese sports market, due to the higher income levels as well as participation rates among the urban population. China's urban population already rose from less than 20% in 1978 to 52% in 2012, an increase of more than 500 million people. The government's plans call for another 600 million people to move to the cities, through a range of rather bold administrative and land reforms.
- While these factors helped to shape the Chinese sports market, its prospects clearly depend on the development of sports participation. This remains relatively weak, due to a range of factors from the dearth of available infrastructure to lack of training resources and education that focuses almost entirely on academic achievements. A government survey released in August, carried out in urban and rural areas in 10 provinces, put participation at 39.8% for people from 20 years exercising at least once a week and at 31.2% for people playing sports or working out at least three times a week. This is an increase compared with the previous survey, but appears rather optimistic.
- The development of sports participation has become one of the stated priorities of the Chinese government, as part of a significant shift in its approach: it has started to acknowledge that active leisure could be an important means to stave off the social tensions and health issues caused or worsened by unbridled economic growth. A statement issued in September even envisages deregulation of sports events, a bold pronouncement in the Chinese context. The implementation of projects to support sports remains very patchy, but policy statements do matter a lot in China and there is little doubt that they will have a significant impact in the mid-term.

- Fitness is one of the categories that has benefitted most from the government's increased emphasis on physical activity. The number of gyms and the penetration rate of gym memberships are still low but they are both growing at tremendous speed. Again, they are driven by the rise of the middle class and urbanization as well as the practical aspects of fitness.
- Running is another flexible sports activity that has been enjoying momentum in China in the last few years. Estimates for the overall number of runners are still underwhelming, due to the structural issues such as air pollution and the dearth of appropriate infrastructure. Yet the rising enthusiasm transpires most clearly in the soaring number of people who register for running events. It contributes to more visibility for a form of physical activity that is increasingly considered as part of an aspirational urban lifestyle.
- Basketball is the must-cover team sport in China, topping the list of most popular sports with an estimated 300 million Chinese people enjoying the game (albeit not necessarily playing it on a regular basis). Popular interest among Chinese youngsters has shifted markedly away from football, which has been plagued by weak infrastructure and poor results. A radical clean-up in administration and investments in grassroots programs could help to give fresh impetus to the Chinese football market.
- The outdoor category has been drawing much interest in China, enabling the market to more than triple in size in the last five years. It has been driven by sudden enthusiasm for outdoor adventure as a lifestyle and fashion. This is another instance where ongoing interest will have to be fuelled by increased participation – and there are some signs that this is materializing. Our report describes the strategies of the leading players in this category, started almost from scratch ten years ago, and provides detailed analysis of its dynamics and challenges.
- An under-developed category that could well turn into the next trend in some parts of the country is action sports. Most of the leading international players are woefully under-represented in China compared with their position in European markets – even though their emphasis on active lifestyle (rather than sports performance) products appears to match the demand of large numbers of consumers. An (as yet small) action sports community is starting to emerge in urban China, driven by private investments and social media.
- China sets itself apart from other developing markets due to the abundance of Chinese brands. Quite a few of them were launched by companies that formerly focused on manufacturing for international brands and some have attained comparable brand recognition. Others may be less familiar (often carrying only a Chinese name on their store front) but they play an important part in the entry price point segment and in the regional markets that more and more market players are striving to penetrate.
- The Chinese market for sports apparel and footwear was shaped in the last two decades by the opening of thousands of mono-brand stores, in partnership between brands, specialist retail groups and their regional distributors. This form of expansion proved most profitable at a time when supply had to be built up. Fierce competition from fashion brands, soaring rental costs and the saturation of some areas have forced a rethink of the relationship between the brands and their retail partners, in terms of assortment guidance, inventory management, logistical and marketing support. Our report provides an overall picture of this new focus on efficiency and sell-through, and studies some of the most successful examples.
- Experience built up by brand owners over the last twenty years provides insights into the most efficient ways to operate in the Chinese market and the structures that may be most adequate depending on the scope, strategy and specialty of the supplier (from own operations to joint ventures, distribution deals). The intense changes of the last few years, requiring fast decision-making, have helped to expose the advantages and drawbacks of different market approaches analyzed in our report.

- These changes have gone hand in hand with the growing concentration of the sports apparel and footwear market. Two Chinese retailers, Belle and Pou Sheng, have come to jointly account for about 15,200 stores (either their own or franchises). This concentration and the increased focus of these retailers on a handful of top brands has encouraged other companies to come up with alternative forms of distribution. Wholesalers have a more prominent part in the equipment market, which remains much more fragmented.
- Multi-brand sports retailers operating in the same way as in Europe already made their appearance in China with Decathlon in 1998, but the development of such concepts has been strikingly slow in the fast-paced Chinese market. Decathlon still has fewer than 100 stores in China and its rivals have made their way into China only in the last three years. However, the concept appears to be gaining some traction, with Xebio, Intersport, Sports Depot and Sportmaster all starting to open their Chinese stores.
- Brands and retailers are becoming increasingly sophisticated in satisfying the demand of Chinese consumers. The report studies various examples of the ways in which these market players address the specific requirements of the Chinese market in all their variety – not just adjusting the fitting for Chinese consumers but also with distinct assortments depending on regions and the purchasing power of environment around the stores.
- Our analysis of consumer behavior is further supported by a consumer survey that was conducted by SGI Europe in partnership with Intersport. Between July and October 2014, more than 500 Chinese consumers responded to a survey of 25 questions about their sport participation, their purchasing habits and favorite brands in different sports categories. The questionnaire has been administrated both online and in sport shops, with roughly equal levels of response from men and women. The main results of this consumer survey will be featured in the general report, while the raw data will be available separately.

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