



# The beautiful game

Football sales are currently buoyant, but they could take a hit if England fail to reach Euro 2008

Despite the high streets last June being quieter than normal as England fans squeezed themselves into every bar with a TV, sales of football footwear did remarkably well.

The number of pairs purchased in the second quarter of 2006 grew 31 per cent, compared to the same period in 2005, and were sold at a higher average price as manufacturers placed emphasis on premium models like Adidas' Tunit, which was released in the national colours of all teams participating in the World Cup.

**BELOW:** Adidas' Tunit was released in the national colours of all teams participating in the World Cup



## Value

At the end of 2006 the GB football footwear market was valued at £174 million, up more than £30 million on 2005. Compared to the last competition year - 2004 - football footwear sales in value were at the same level in 2006 (fig.1).

Growth in the football footwear market wasn't just restricted to the likes of JJB and Sports World, as increased confidence in the internet helped online retailers like Pro-Direct Soccer, a relative newcomer, to strong performance with its high-end offering.

Puma aimed to enhance its status in football with the launch of the Speed v1.06, timed to coincide with the earlier African Cup of Nations, enabling the company to take a stronger football presence into the World Cup Finals. Puma still

## AT A GLANCE

- Sales of football footwear in the second quarter of 2006 grew 31 per cent, compared to the same period in 2005
- At the end of 2006, the GB football footwear market was valued at £174 million, up more than £30 million on 2005
- Increased confidence in the internet helped online retailers like Pro-Direct to strong performance
- Only 72 per cent of football footwear is used to play football in
- Nike and Adidas account for over two thirds of all football footwear sold
- Six million replica England football shirts were sold across Great Britain in 2006, up four per cent on 2004



has some way to go before it challenges the major football brands in Great Britain, however, as Nike and Adidas increase their dominance and now account for over two thirds of all pairs sold.

### Off-pitch category

A key observation is that not all football footwear is actually used to play in. In fact, only 72 per cent of purchases are used to play the sport. This new 'off-pitch' category has been developed by the major brands to emphasise their core values through promotion of their sponsored players.

The aim is to target the younger football consumers, who base their purchase decisions more on aspiration than actual products, and then tie them into the brand. Nike's 'joga bonito' campaign, celebrating the art of beautiful football, and the more



recent launch of its 10R Ronaldinho signature edition are prime examples of brands attempting to echo players' passion and flair.

### Apparel

In terms of football apparel, sales of replica football shirts are very much dependent on the performance of the team. As England qualified for the 2006 World Cup Finals, sales of England shirts went through the roof, with nearly two thirds of all shirts sold in 2006 passing through the tills in April, May and June - in time for the start of the tournament.

2006 saw around six million replica England football shirts sold across Great Britain, which was up four per cent on 2004 when England were playing in the Euro Championships, indicating growing visible support for the national team.

In non-competitive years, league teams rather than international teams drive the sales of replica kit. Adidas gained a stronger presence in this

sector, increasing its share of the football replica shirt market with the company's newly acquired Liverpool and Chelsea kits boosting its portfolio. Liverpool overcame Chelsea in the Champions League semi-final and now face AC Milan, another Adidas-sponsored team, in a repeat of the 2005 final. This provides strong marketing opportunities for Adidas, whose three stripes will be emblazoned across the shirts of both teams, as well as the ball. However, as far as retailers are concerned, the England qualifying games are the ones to watch as failure here will have a massive impact on their next year's sales.

Data was sourced from The NPD Group's POS and Consumer Panel services. For further information contact The NPD Group sports team on 01932 355580. ❁

**ABOVE:**  
Puma aimed to enhance its football status with the launch of the Speed v1.06

