



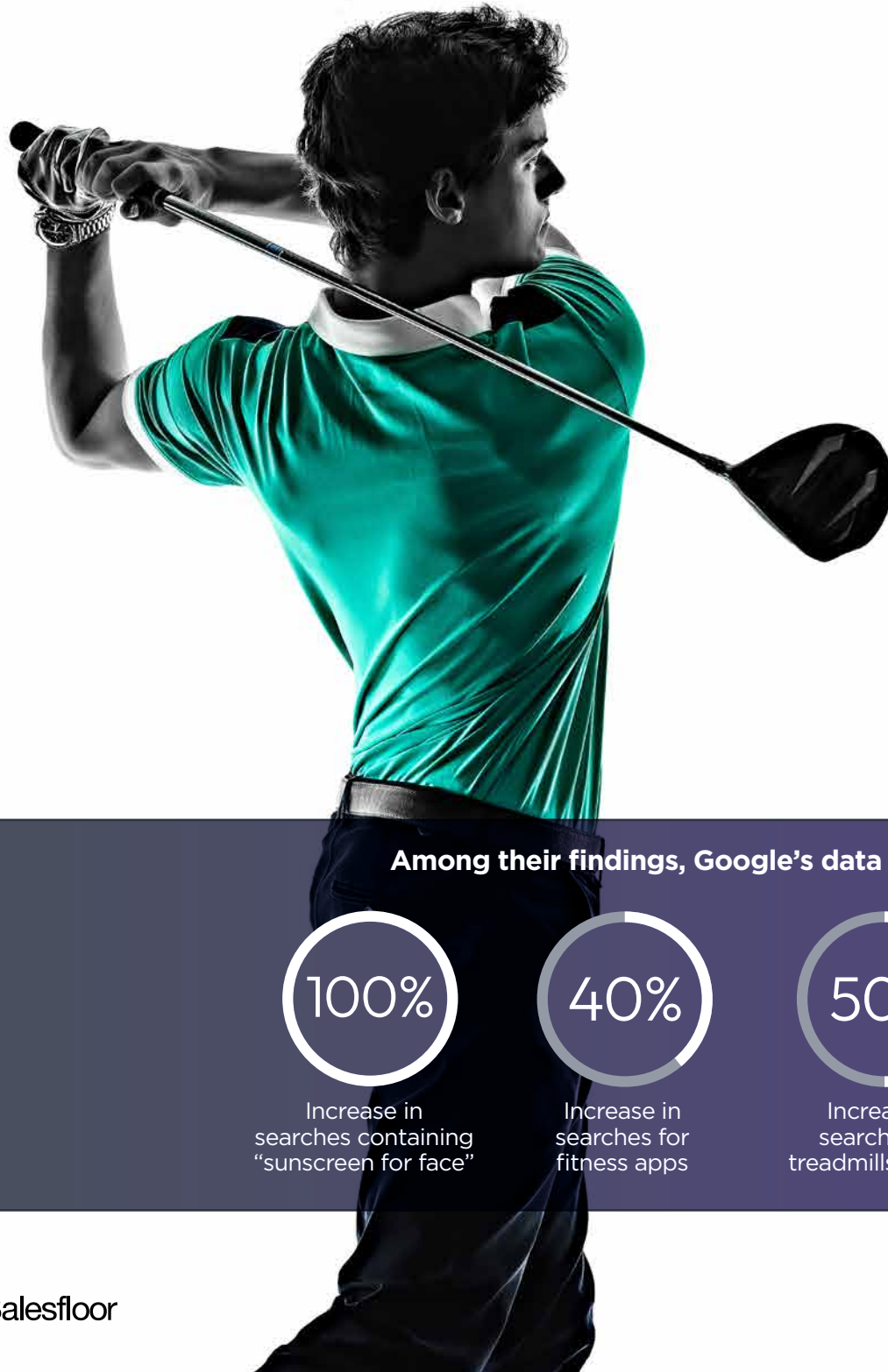
# SPORTING GOODS RETAIL REPORT

 Salesfloor



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## INTRODUCTION

Amidst the backdrop of global uncertainty, a cultural shift is underway. Isolated from the creature comforts and distractions that defined the time before, we have, as a global society, had to adjust to a new normal where the boundaries between work, family, and play are blurred. To combat boredom and in the hopes of waging a stronger defense against Covid-19, an unseen threat that turned the high streets into ghost towns, a new focus on health and fitness emerged.

The sporting goods industry experienced exponential growth during the past two years. Gyms and group sports activities were necessarily closed, prompting long-time fitness enthusiasts and those newly taking up a healthier lifestyle to find alternative ways to incorporate fitness into their lives. In October 2020, trade credit insurance leader Euler Hermes observed that global web searches for sporting goods and activities saw “a peak in demand related to fitness, yoga and Pilates workouts...with interest still up 40% to 80% from last year”.

2021 marked a new hope and, with it, a new wave of societal shifts. Wide scale vaccination efforts resulted in a significant drop in new Covid-19 infections and dramatically reduced the likelihood of severe infections, making it safe for us to cautiously reunite with friends and family in social settings. That said, the new interest in at-home fitness and wellbeing has not diminished. Google’s Year in Search 2021 reports that people have continued to invest in self-improvement and are “enlisting brands as partners in the process”.

Among their findings, Google’s data suggests year over year (YoY) increases in searches for:



Increase in searches containing “sunscreen for face”



Increase in searches for fitness apps



Increase in searches for treadmills for sale



Increase in searches for swimming lessons



Increase in searches containing “best time to take vitamin”



Increase in searches for skincare products

# THIS REPORT SEEKS TO IDENTIFY WAYS FOR THE SPORTING GOODS RETAILER TO TRANSFORM THEIR IN-STORE DIFFERENTIATORS INTO DIGITAL BUSINESS RESILIENCE.

”

Despite continued growth expected in the market, sporting goods retailers are facing a new challenge. The pandemic forced consumers online, and in doing so, pitted retailers against direct to consumer brands. These DTC brands like Nike and Puma have strong e-commerce platforms which consumers were drawn to during lockdown.

In order to stay resilient going into the post-pandemic era of immersive virtual shopping, sporting goods retailers should not to recreate these e-commerce models. Instead, they need to invest in technology that lets them leverage the high touch customer service that sets them apart across online channels.

This report provides a snapshot of the sporting goods industry and seeks to identify ways that retailers can transform their in-store differentiators into digital business resilience.





# SPORTING GOODS RETAIL OUTLOOK 2022

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 [Speak to a Sporting Goods Retail Strategist](#)

The sporting goods vertical is unique in the retail sector because customers rely on expert advice to make their final purchase decisions. Until recently, this guidance was only available in offline channels. As such, sporting goods retailers have invested heavily in optimizing the in-store experience.

During 2020 and 2021, consumers became more conscious of health and were actively seeking out fitness regimens that could be done either at home or outdoors and which were self-directed. For that reason, the sporting goods vertical enjoyed significant sales growth. In McKinsey & Company's Sporting Goods Report 2022, the authors reported that the sporting goods industry experienced a 14% year-on-year growth which is "more than double the average annual growth rate (CAGR) between 2015 and 2019 (5%)".

The same report projects that this growth will continue in 2022 with projected growth of 8-10% a year until 2025. In order to achieve that growth, however, sporting goods retail leaders must capitalize on opportunities to expand their differentiating unique selling propositions and leverage the strength of their existing business model in new channels.



## THE IN-STORE EXPERIENCE DIFFERENTIATES THE SPORTING GOODS SEGEMENT FROM OTHER RETAIL VERTICALS

The McKinsey report identified 5 key themes that executives will prioritize in 2022:



Consumer  
behavior habits



Social selling



Sustainability



Shifts in channel  
ecosystem

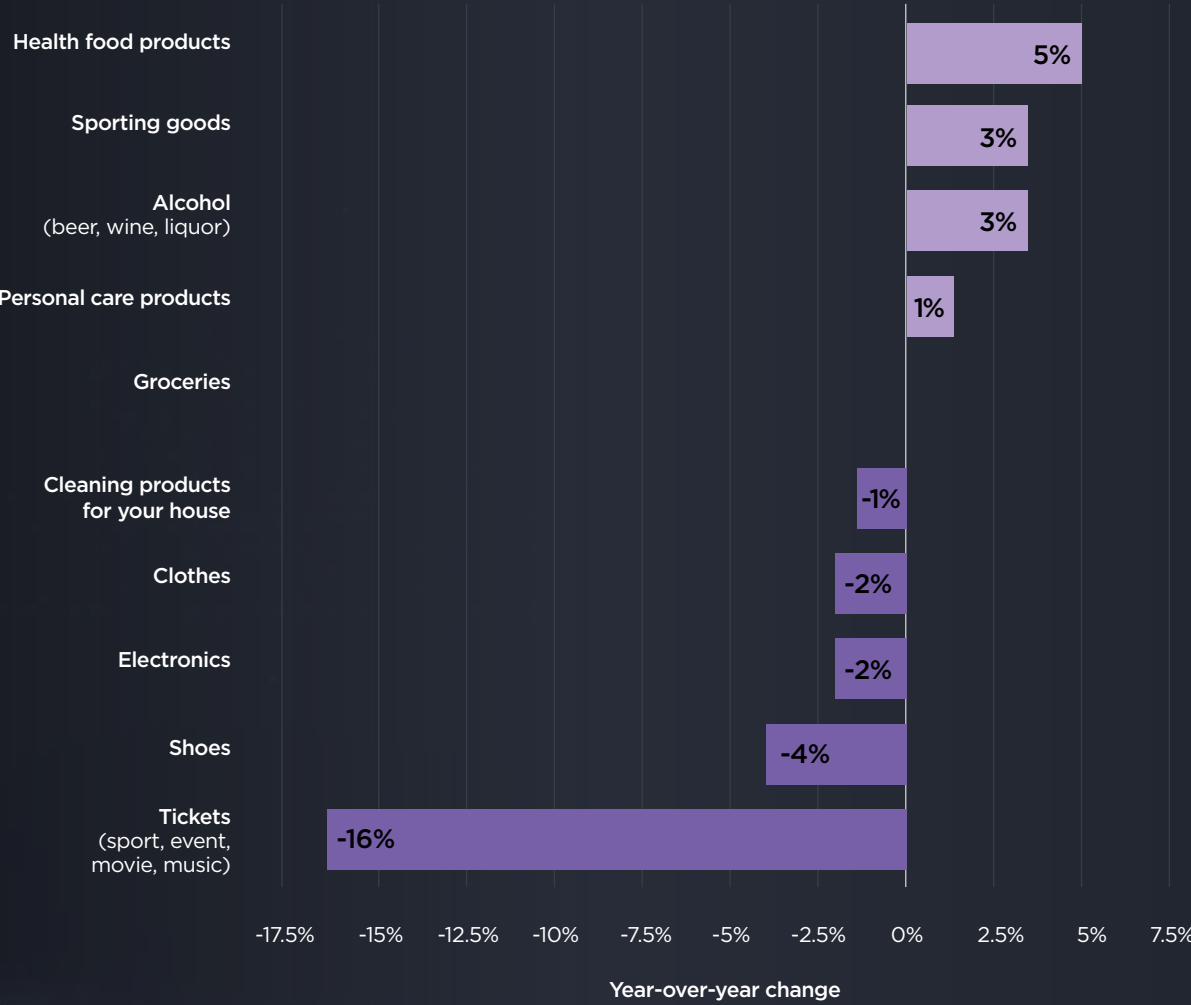


Supply chain  
turmoil

While these are topics that have been top of mind as priorities have continued to shift throughout the pandemic, they will come more clearly into focus as we enter what is hopefully its final iteration and the "new normal" becomes simply normal.



# YEAR-ON-YEAR CHANGE IN SHARE OF U.S. CONSUMERS SHOPPING SELECTED PRODUCT CATEGORIES BETWEEN 2020 AND 2021, BY PRODUCT CATEGORY



Source  
Sponsorpulse © Statista 2021

Additional information  
United States, February 2021, 8,000, 13 years and older



# A LEAGUE OF ITS OWN: SPORTING GOODS RETAIL CUSTOMER EXPERIENCE

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**In her article, “Insights into customer experience in sports retail stores”, Elisabeth Happ analyses the motivations of sporting goods consumers and looks at what they consider when evaluating their overall satisfaction when shopping for sports apparel, shoes, and equipment. She found that consumers in this space are task-oriented and approach shopping for sports products with more gravity than is seen in other verticals. She also found that successful retailers addressed those elements important to customers intentionally when designing their in-store experiences. This successful in-store experience design is a road map for sporting goods retailers looking to win across digital shopping channels.**

The pandemic prompted a paradigm shift in consumer sentiment towards online shopping. In July 2021, Forrester reported a large shift in consumer perception in the role of brick-and-mortar stores and the in-store shopping experience.

The Forrester survey reported that customers feel frustrated with breakdowns in the online shopping supply chain. More importantly, however, the consumers they polled feel a deep-seated desire to reconnect with community, and are mourning the loss of what in-store shopping represents in the wider context of society.

A survey conducted by Eurostat showed that customers prefer in-store shopping over digital channels for the ability to interact with the product and receive support from sales associates when shopping for products they are not familiar with. Sporting goods retailers have long been ahead of the curve in re-thinking the physical store’s role in customer experience. Their stores have designed to fulfill their customers’ desire for community. The in-store experience sporting goods customers enjoy has been intentionally designed to appeal to the task-driven consumer and satisfy their need for expert guidance and community.

Sporting goods customers have rewarded retailers for excellent in-store experiences with high brand loyalty, even during the pandemic when they were denied the luxury of that in-store shopping experience.

## EXPERIENCE THE HOUSE OF SPORT

Sporting goods retailers have begun designing experiential spaces for niche sports markets. Dick's Sporting Goods, for example, has designed a 100,000-square-foot concept store called "House of Sport" that was designed to satisfy four pillars: Product, Service, Community, and Experience. House of Sport is more than a store. It is the epitome of sports-loving experience that is sure to be a destination for sports fans akin to the field in Field of Dreams.

House of Sport has an "outdoor turf field and running track, a rock-climbing wall, batting cages, and golf hitting bays" and will be used as research and development labs to test new customer experience concepts, products, and other strategies that will be rolled out nationwide. The experience designers behind the impressive House of Sport concept believe that the future of in-person retail will be experiential and consumer perception of the experience can be broken down into four pillars: **product, service, community, and experience.**

Underpinning those four pillars are "passionate and skilled employees and enhanced technology for ease of connection with the brand", says Toni Roeller, SVP of In-Store Experiences & Visual Merchandising at Dicks Sporting Goods.



### PRODUCT

- Interact with equipment like golf clubs, sports balls
- Touch the fabric and test apparel
- Try on athletic shoes and equipment
- Test treadmills, stationary bikes



### SERVICE

- Interact with store employees
- Offer opinions to store employees
- Receive advice from store employees
- Ask store employee opinions



### COMMUNITY

- Advise other customers
- Ask opinions of other customers
- Feel like a member of a community of customers at the store
- Interact with other customers



### EXPERIENCE

- Teach me interesting things
- Awaken curiosity
- Inspire creativity
- Bring interesting ideas to mind

As the boundaries between in-store and online channels continue to blur, sporting goods retailers will need to learn how to leverage these differentiating strengths- immersive, multisensory brand experience and high touch, guided support from sales associates- in digital channels in order to maintain customer loyalty and market share.



# THE SPORTING GOODS CUSTOMER: PROFILE & PREFERENCES

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[👉 Speak to a Sporting Goods Retail Strategist](#)

Despite the massive shift towards online shopping across verticals, customers still by and large prefer to shop in-store when looking for sporting goods. As reported in the McKinsey report, consumers in 2022 will continue to “be active in different ways, amid rising health awareness and a greater commitment to digital, community-led exercise”. These new sporting goods consumers will be looking to retailers and their sales associates for guidance on finding the right athletic apparel, footwear, and equipment to facilitate their rising interest in fitness.

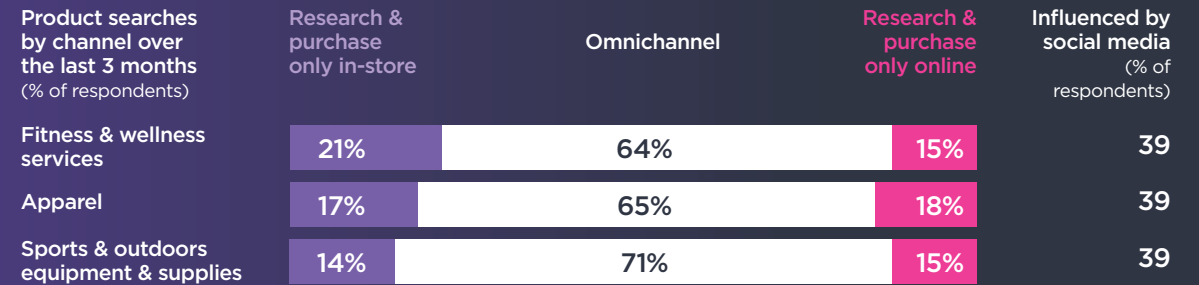
The rising popularity of digital fitness apps indicates an acceptance of the immersive and persistent virtual reality we are moving towards in the realm of sporting goods. Social media influencers on Instagram and TikTok who create fitness and sports related content are adding thousands of new followers every week as consumers seek out inspiration, tips and tricks, and seek to find a community of like minded people to accompany them on their fitness journey.

Moreover, while customers are keenly aware of new products and trends through social media, the reviews of influencers and others on social media do not sway these customers into buying online. Instead, they prefer to wait until the trending item is available in-store.

Happ observed in her article a direct correlation between experience level and appreciation for the in-store experience amongst sporting goods consumers. For these newly converted fitness aficionados, their journey to improved health begins online in forums devoted to inspiring the newly committed. But as they become more seasoned, these consumers will, like others before them, begin to trust their own judgment and the guidance of experts offline as well as via social media. This desire for hands-on support is unique in retail, and a differentiator that many traditional offline sporting goods retailers have built their brands supporting.

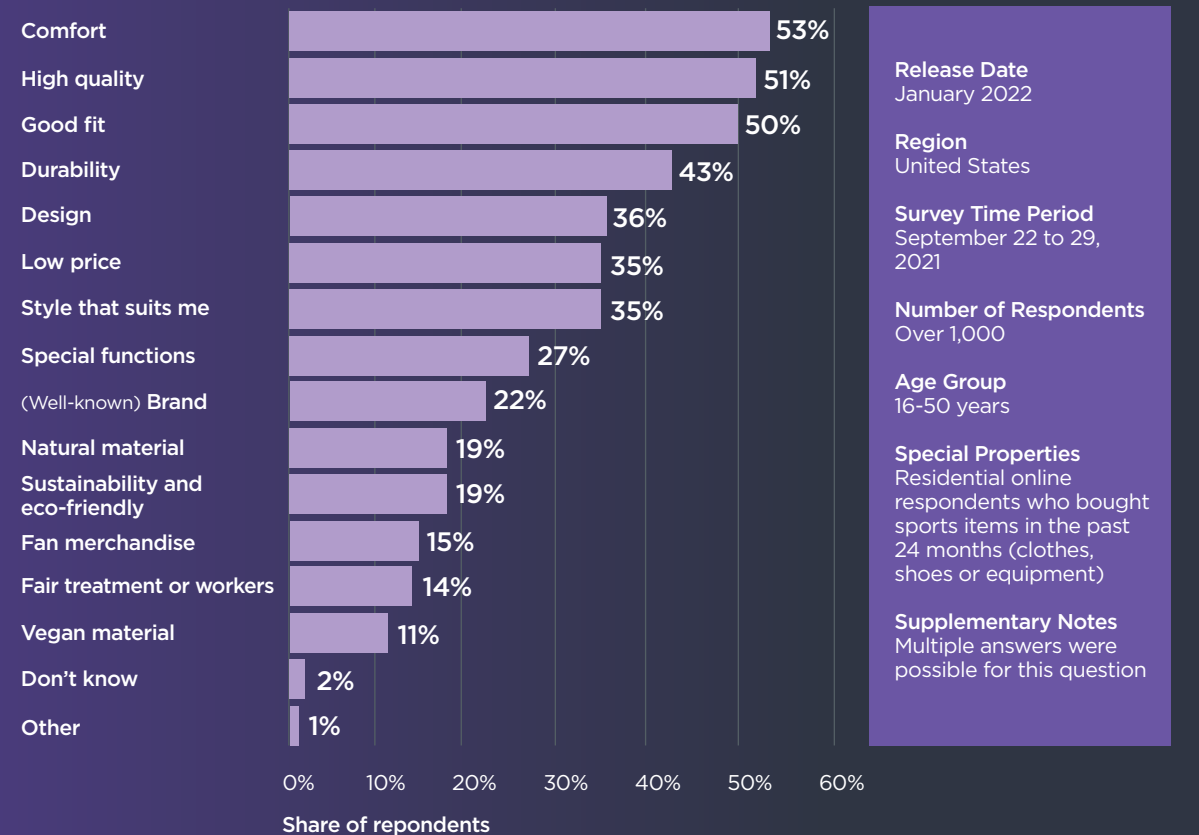
So, why is the in-store experience so important when purchasing sporting goods? The answer is complex, but for sporting goods customers it boils down to three points: the ability to interact with products, exceptional customer service, and-- most importantly-- community.

### 36-40% OF CUSTOMERS ARE INFLUENCED BY SOCIAL MEDIA



Source: McKinsey & Company COVID-19 US Consumer Pulse Survey 8/25 - 8/31/2021, n=2,004, sampled and weighed to match the US general population 18+ years

### WHAT IS MOST IMPORTANT TO YOU WHEN PURCHASING SPORTING GOODS, SUCH AS SPORTSWEAR, SHOES AND EQUIPMENT?



## PRODUCT

Because sporting goods are functional purchases as well as fashionable (as in the case of athleisure wear and sneakers), sports consumers want to see, touch, and try items in store before they make a final decision and purchase. As Happ observed, this becomes increasingly more important the more experienced the customer is in a particular sport.

In a focus group conducted by Elisabeth Happ, one participant said, “I want to know what the product feels like, how the freedom of movement is, and whether the function meets my requirements.” Ultimately, the decision to buy one product over another, particularly when it comes to sporting goods, comes down to the confidence the customer has in the products ability to keep up with their athletic goals.

In this vertical, buying the wrong product can have dire consequences for the customers ability to indulge in their sport of choice. This is why customers do not rely on the word of influencers or promises made in reviews or by product makers. Their perception of the quality and usefulness of the product outweighs any messaging they might receive from social media and trendsetters.

## SERVICE

The role of the sales associate in sporting goods buying decisions cannot be overstated and are a major contributing factor to the continued preference of sports customers to shop in-store. In her article, Elisabeth Happ identified a direct correlation between the customer’s expertise in their chosen sport and a desire to shop in-store with a sales associate.

Where customers may not believe influencers, they do trust the advice and guidance of experienced sales associates helping them in-store. Sporting goods retailers understand the value their sales associates offer to customers and ensure that employees are not only well trained, but that they have an innate passion for sport that their customers can relate to.

In all sports, but particularly more extreme ones, it is important that your equipment will function as advertised because any malfunction could lead to serious injury. The knowledge that sales associates bring to their role is important because they ask pointed questions about when, where, and how the product is going to be used, how proficient the user is, and others that help them to guide the customer to the best product. The overall experience results in the customer making an informed decision that they feel confident in making and reinforces brand loyalty.





## THE SHOPPING EXPERIENCE FOR THE SPORTING GOODS CUSTOMER BOILS DOWN TO THE IN-STORE ENVIRONMENT, THE PRODUCT AND THE SERVICE



### Community

In addition to excellent service they receive from sales associates, sporting goods customers enjoy interactions with each other in-store. They are excited to share product recommendations, ask advice, and offer opinions to other shoppers while in-store. Those passionate about their sport are always eager to meet others with the same passion, forming the foundation of a community anchored by the in-store environment.

Community forms the foundation of any sports event or activity. Whether it's Pop Warner or Crossfit, what makes athletics and sport so compelling is the friendships, the mentors, the satisfying feeling of inclusion that taking part in a sport provides. Sporting goods retailers understand this and have done an excellent job of inviting that sense of community into their stores at every touchpoint.

As previously mentioned, these community building exercises are anchored by the sales associates who customers trust to support them on their journey. Each sales associate has their own loyal customer base, creating micro-communities within the larger communal eco-system of the store. That sense of community and feeling of belonging drives loyalty, reinforces trust and confidence, and increases brand net promoter scores (NPS) among customers and employees alike.

### The In-Store Experience

As seen in previous sections, sporting goods retailers have invested significant resources to create an in-store environment that supports the needs of their customers and generates brand loyalty. The displays, employee training, and intentional community building have reinforced for customers their satisfaction and trust in brands they are loyal to.

Since sporting goods customers appreciate the ability to interact with products, the displays and layout of sporting goods stores are designed to encourage customers to touch, try, and otherwise interact with the products they are considering. When they are given the freedom to try products, customers feel more confident in the purchases they make and form a positive relationship with the brand that keeps them coming back.

Retailers like LuluLemon understand the importance of community for their customers. As the consumer world becomes more digitally fluent, the role of the brick-and-mortar store has evolved to be something more than a simple point-of-sale. At a corporate level, these retailers have re-imagined the way that customers interact in their physical spaces and empower local store leaders to implement and actively encourage community building initiatives like workshops, fitness classes, product training, and meet and greets with notable sports personalities.



# DIGITAL ACCELERATION

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Before the pandemic the use of technology to research products was already firmly established. In stores everywhere, customers could be observed scrolling their smartphones or showing sales associates an item for help finding it on the racks. Since the pandemic, this behavior has only increased and is now habitual across demographics. This trend is only going to continue and the persistent virtual reality we are moving towards is something that retailers must consider when designing both their in-store and online spaces.

Interestingly, the generations most skeptical of online shopping are the ones least willing to return to uni-channel shopping once the pandemic wanes. According to Forrester again, “more than demographics like gender or income, consumer age shapes shopping choices.”

They found that:

- Gen X consumers are the most jaded by in-store shopping, with 47% saying they enjoy shopping in stores far less than they did two years ago.
- Millennials are the generation most inclined to shop online and don't see a need to shop in-store when online options are readily available and more convenient for them.
- Interestingly, Gen Z feel the most positively about in-store shopping and express excitement about shopping sprees and the social and emotional aspects of this activity.

Despite all of this, sporting goods retailers have realized a new threat to their sustained viability in the new normal. Throughout the pandemic, sporting goods customers were forced to shop online and found that the online experience with brands they were loyal to did not live up to what they appreciated about their in-store experience. This disconnect ultimately resulted in DTC sporting goods retailers and brands that supply products to sports stores chipping away at the market share once strongly held by sporting goods retail brands.

Having a functional e-commerce site and online presence are no longer enough to ensure market success in this vertical. In 2022, sporting goods retailers will be investing in technology that will improve their online sales model and win back shoppers lost to brands leveraging all of the digital channels available to them in order to reach and engage with customers.

McKinsey reports that despite overall growth in the global sporting goods market, “on an individual company level, there was less performance mobility than in other industries, with the strongest players continuing to outperform”. Their ability to outperform is due to a strategic focus on strengthening their digital operating models.

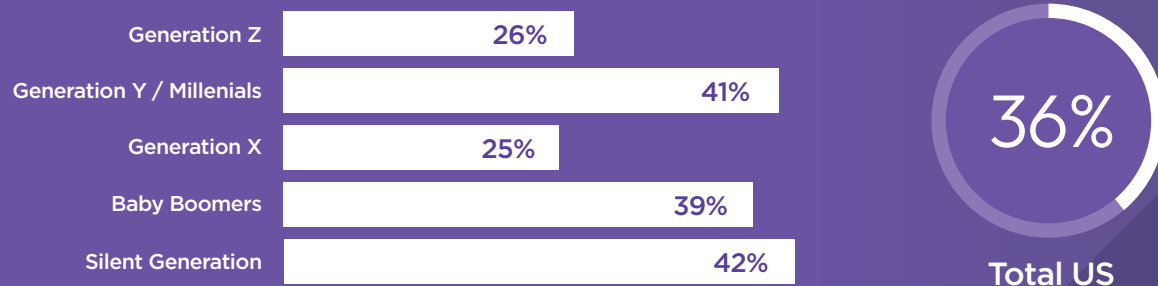
The report shows that the strongest players:

- Developed their DTC operating models
- Worked diligently to create and nurture communities
- Introduced agile approaches to mitigate and manage supply chain disruptions

For sporting goods retail executives looking to invest in digital acceleration, replicating the successes of players like Adidas and Nike may not be practical or find purchase within their operating models. Instead, these retailers should look to invest in technology which will allow them to extend their differentiating advantage into the virtual space and more fully leverage the Internet of Things to digitally enhance the in-store experience, as well.



### THE PANDEMIC HAS DRIVEN CONSUMERS TO REEVALUATE THE PURPOSE OF PHYSICAL STORES



Base: 528 US online adults  
Source: Forrester's June 2021 Consumer Energy Index and Retail Pulse Survey

**AFTER THE PANDEMIC IS OVER, I WILL NOT HAVE A NEED TO RETURN TO IN-STORE SHOPPING**



# THE RISE OF SOCIAL SELLING AND INFLUENCER CULTURE

As previously established, sporting goods customers are actively engaged on social media and follow influencers who inspire them and introduce them to new techniques and products related to their shared sport of choice. These influencers are perceived as trustworthy and act as focal points around which highly engaged communities are built.

According to McKinsey:



of people follow sporting influencers on social media



of the group polled are receptive to product recommendations made by these influencers



of the group made purchases based on an influencer's recommendation



of customers actively seek out user reviews before making purchases

Brands recognize the epic power that influencers have over buying decisions for their customers and have responded by partnering with influencers and athletes. In addition to collaborating with celebrities, brands have also seen the power of micro-influencers in promoting their products to more niche audiences.

McKinsey observes that “more sophisticated players are adopting a cluster approach to influencer marketing, aiming to create network effects by bringing together diverse influencers over a limited period of time”. These brands have significant bandwidth and human capital dedicated to influencer outreach and management in order to coordinate efforts across such a wide spectrum of personalities and platforms. Unlike spokesmodels, actors, and traditional sponsorship deals, influencers are less easily controlled by the brands and their lack of formal media training is largely why they are trusted by their followers. However, influencer missteps make for salacious viral content and have lasting impacts on the reputation and performance of associated brands.

Sporting goods retailers employ a legion of trusted experts who, if enabled with the right technology, are primed and ready to assume the mantle of micro-influencer. By looking at in-store associates through the influencer lens, smaller players can achieve a similar impact while also arguably avoiding the potential pitfalls of influencer sponsorships.





# WINNING THE HEARTS AND MINDS OF DIGITAL SPORTS CONSUMERS

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As the digital acceleration continues, there will continue to be clear winners and losers across industries. Whereas before when a reluctance to embrace omnichannel was the game winning deciding factor, now the game will be won or lost based on how authentically conveyed the brand experience is across touchpoints. Consumers want and expect a consistent, seamless brand experience regardless of where they are shopping- in-store, online, or both simultaneously as the case most often is now.

DTC brands like Nike or Puma have digital acceleration goals which apps, virtual in-game apparel, and numerous impersonal, albeit advanced, digital shopping channels. Traditional sporting goods retailers may feel like competing for digital sports consumer loyalty requires modeling the same tech investments as their DTC counterparts. This could not be further from the truth.

In order for retailers to win the digital consumer market, they need to leverage their differentiators in the digital space. This means supplying their in-store sales associates with the right tools to connect with customers online and ensuring that customers can reach out easily to local sales associates for product support, appointment booking, advice, and community resources like they do in-store.

## PLAY TO YOUR STRENGTHS

The need for sporting goods retailers to strengthen their digital brand presence is an undisputed high priority. The strongest online players right now are brands like Nike and Adidas which are both retailers and vendors for sporting goods retailers like Champs Sports and Dick's. The strategies that Nike and Adidas leverage so successfully do not translate well for wider athletic retailers.

Comparing these two business models is akin to comparing the games of basketball and football. They're both widely popular sports, but the similarities end there. Extending the analogy and narrowing the focus, a game plan that wins a championship for one team will not guarantee a championship if applied by another team. This is because game plans, like business plans, are designed to leverage the strengths of each individual player and the dynamics between all players on the field.

Sporting goods retailers already have a winning strategy that they have been putting into play on their home field for years. Just like playing an away game, the same game plan applies and can win the day provided you are flexible and make agile adjustments to accommodate an unfamiliar field.



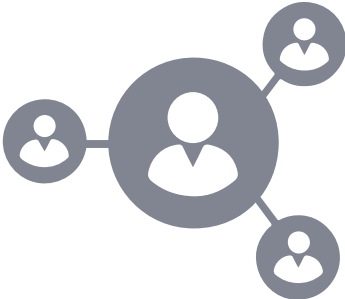
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**THE NEED FOR RETAILERS  
TO STRENGTHEN THEIR DIGITAL  
PRESENCE IS AN UNDISPUTED  
HIGH PRIORITY.**

# CREATE YOUR WINNING GAME PLAN

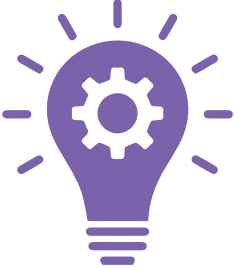
WHAT CUSTOMERS APPRECIATE THE MOST WHILE SHOPPING FOR SPORTING GOODS ARE...



The ability to interact with products



The sense of community, the store, other customers and employees create



The expertise and product knowledge of local sales associates

## INTERACT WITH PRODUCTS

- Virtual product demonstrations
- Video calls with sales associates
- Post purchase follow-up email/text with instructions to ensure good fit, etc

## COMMUNITY

- Social media
- Challenges, streaming events, virtual classes
- Reviews
- Associate StoreFronts

## SALES ASSOCIATE

- Live chat
- Video and text messaging
- Appointments
- Customer insights

## THE HOME FIELD ADVANTAGE

Bring the in-store customer experience to online shoppers with Salesfloor's immersive virtual retail platform.

Speak to a Sporting Goods Retail Strategist

Salesfloor's virtual shopping, customer outreach, and sales automation tools enable associates to offer online shoppers the in-store customer experience.

### Up Your Sales Game

Automated tasking boosts AOV by helping associates to offer the right products at the right time to customers.

### Boost Customer Engagement

Retailers using Salesfloor report significant lifts in customer engagement as seen by the 78% increase in email open rates and a 50% increase in customer response rates.

### Soaring Conversion Rates

Retailers have generated an average 10x increase in online conversions with Salesfloor's video chat, live chat, text messaging, email, and social media outreach tools.

### Better Customer Engagement

 **50% INCREASE**  
in online AOV

 **50% INCREASE**  
in first time buyers

 **40% DECREASE**  
in returns

 **OUTREACH**  
**\$115 NEW REVENUE**  
per associate per day

Download the e-book

## CONCLUSION

The digital acceleration is about more than just consumer preferences. It is a cultural shift towards a more persistently connected reality where our work and personal lives are being played out in both digital and analog channels simultaneously. We are rethinking our relationship with our homes and taking our health into more consideration than ever before.

For sporting goods retailers, staying competitive will mean leveraging their unique differentiators in a new channel. While this may seem like a complex challenge, it doesn't need to be. Salesfloor has assisted enterprise retailers across the globe in implementing strong digital retail programs that enable sales associates to connect with, serve, and sell to digital customers. With help from Salesfloor, retailers are increasing their AOV, increasing online conversions, and seeing higher satisfaction levels from both customers and their sales associates.

Let Salesfloor's sporting goods strategists assist you in designing a digital game plan that will leverage your differentiators and win the day for your online customers.

## ABOUT THE AUTHOR

**Jennifer Mullen** is Salesfloor's resident content manager. She is a seasoned industry reporter and analyst who has written reports read by leaders across industries, including manufacturing, environmental sciences, retail, and financial technology.

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