

Canadian Sporting Goods Association

Category Report – 12 ME Month

Date (Optional)

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Agenda

1. NPD Group's Solutions

2. Category Overview

- Market Size
- Segment Trends
- Seasonality
- Retail Trend
- Brand Trend
- Purchase Factors
- Demographic Profile

NPD global sports insights



Countries

- Brazil
- Canada
- China
- France
- Germany
- Italy
- Japan
- Mexico
- Netherlands
- Poland
- Russia
- South Korea
- Spain
- Sweden
- Taiwan
- United Kingdom
- United States



Meet Matt



Matt Teeple Canadian Sports Industry Analyst

Matt Teeple covers the Canadian apparel and footwear industries with an emphasis on sports and recreation. He has immersed himself in the Canadian sports landscape, embracing not only Canada’s national pastime, hockey, but also baseball, golf, soccer, and more. Matt provides in-depth insights and industry expertise to many of the leading brands and retailers in the global sports marketplace. He focuses on categories such as running, outdoor, fitness, and athleisure. Matt has been with The NPD Group for more than four years; previously, he was with DirectLink for five-plus years, working on the vendor side of the business.

The NPD Group's Solutions



Tracking Services

Reveal the market! The core and essential data every business needs to understand what's selling, who is buying, and where. We show you not just your performance, but your competitors' too.



Solutions

Are your needs more tactical? Modeling and custom research to drive sales by understanding your customer, evaluating the effectiveness of a marketing effort, uncovering threats, forecasting volume or optimizing pricing strategies.



Advisory Services

We combine our unique data assets and industry expertise to deliver a winning advantage. This extensive analytical experience is applied to multiple data sources to provide a deeper understanding of the competitive landscape.



Results

Our clients use us throughout the business process: strategic planning, product development, marketing, sales, and measuring results. Ultimately aiding in better business decisions.

How It Works

01

SURVEY EMAILED DAILY

Captures 7 day recall.

02

TO THE NPD PANEL

Over 100,000 members representative of the Canadian population.

03

TRACKING CONSUMER PURCHASES

Approximately 30,000 purchases monthly.

04

DATA CALIBRATED TO:

Stats Canada, Financial reporting of retailers, and Client inputs. Data delivered monthly

Category

\$XXX Million

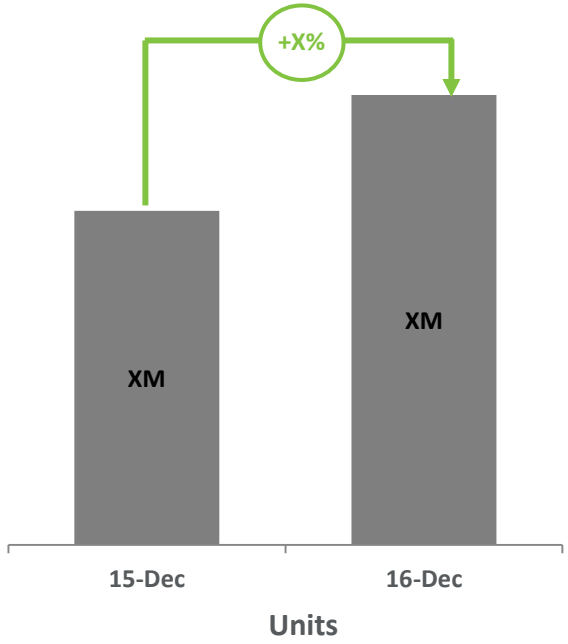
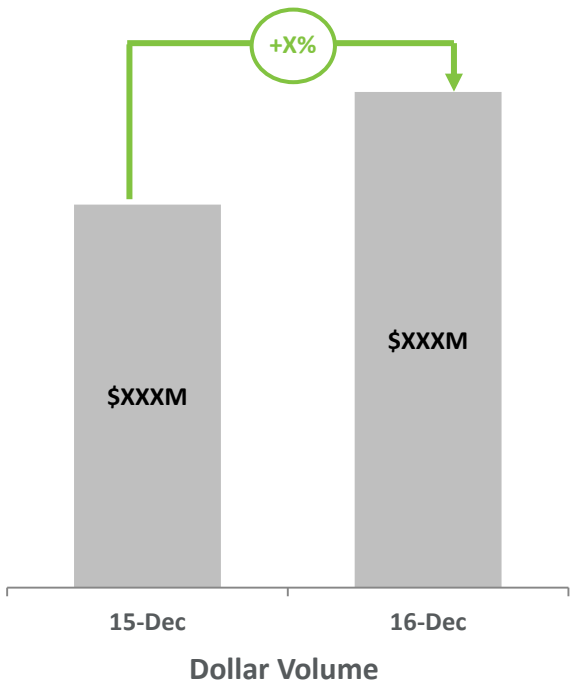
+X%

\$XM per share point gained or maintained

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Category is worth \$XXXM; growth is driven by price and units purchased

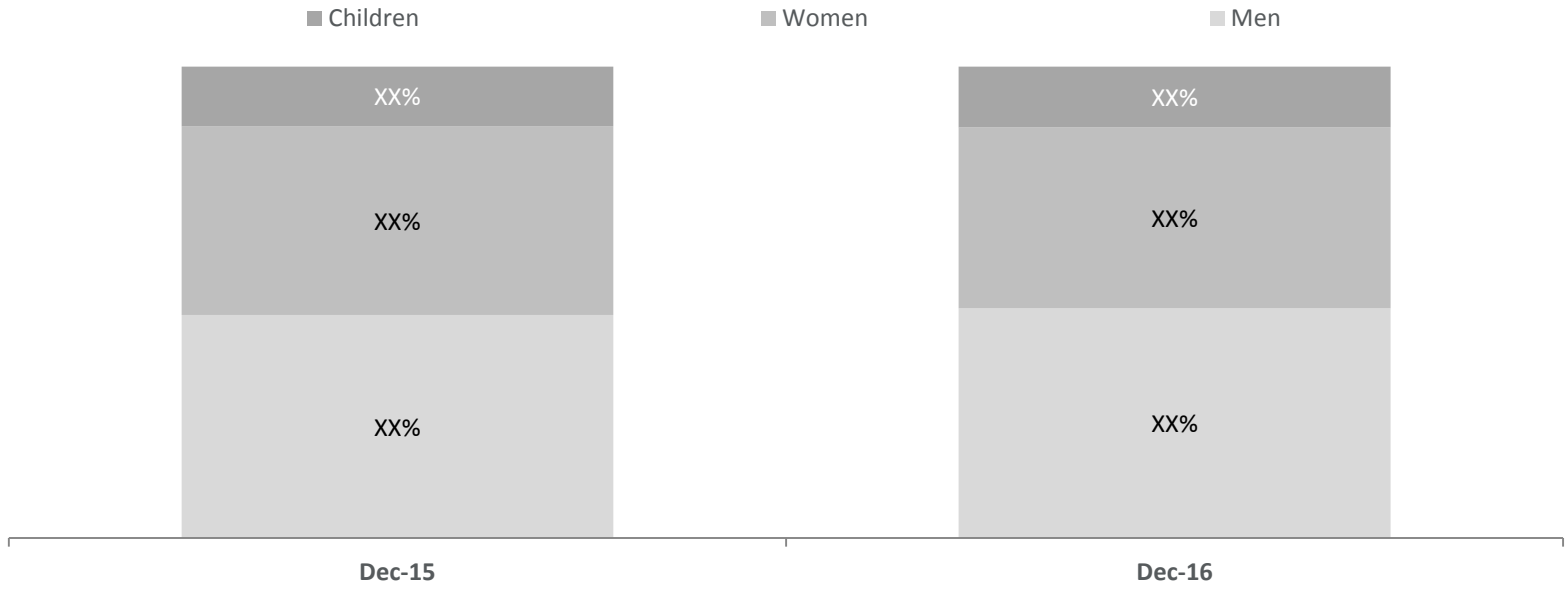
Category: \$ Volume and Unit Trends
12ME December 2015 vs 2016



Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Men gained share and Children's share was flat compared to last year

Category: Consumer \$ Share
12ME December 2016



Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Category sales ramp up in the years second half and peak in December

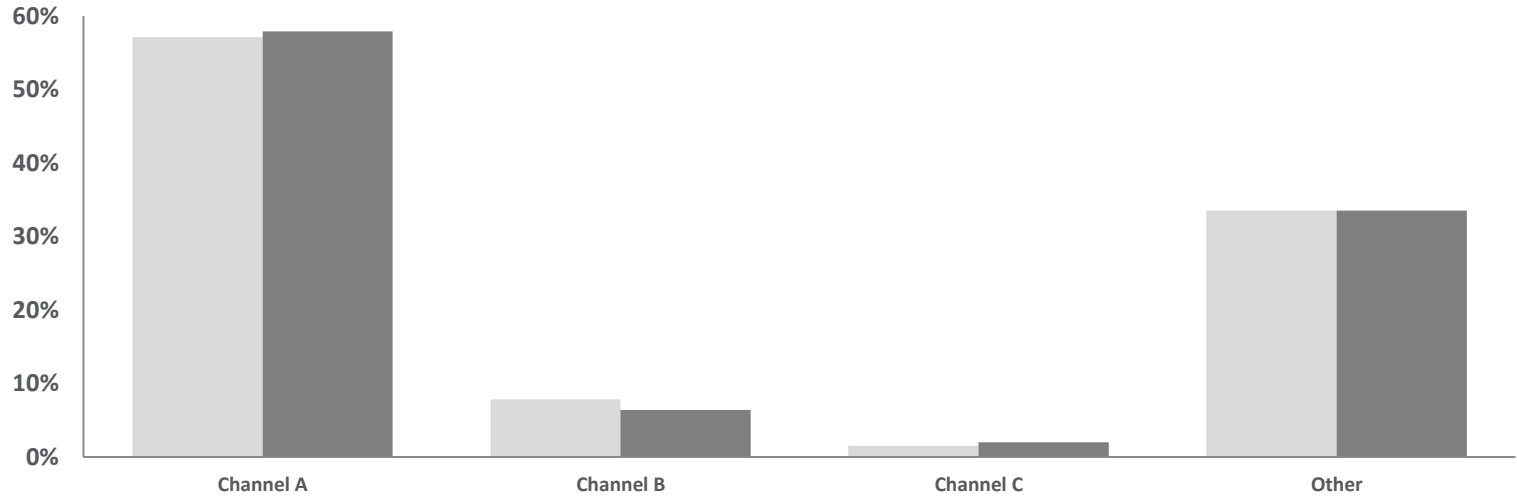
Category: Consumer Unit Shares Seasonality
12ME December 2016



Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Channel A accounts for over half of the consumer spend

Category: Key Channels – Consumer \$ Shares
12ME December 2016

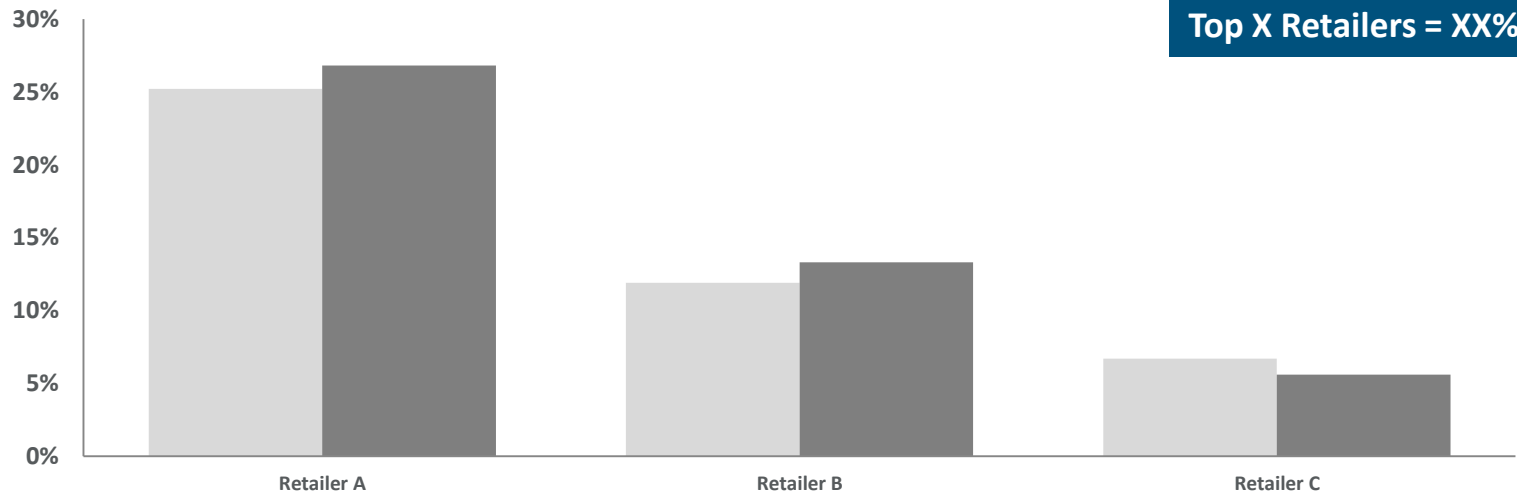


■ Dec 2015	XX	X	X	XX
■ Dec 2016	XX	X	X	XX

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Retailer A and Retailer B are the two largest retailers for Category, they both gained share in the past year

Category: Top 3 Retailers – Consumer \$ Shares
12ME December 2016

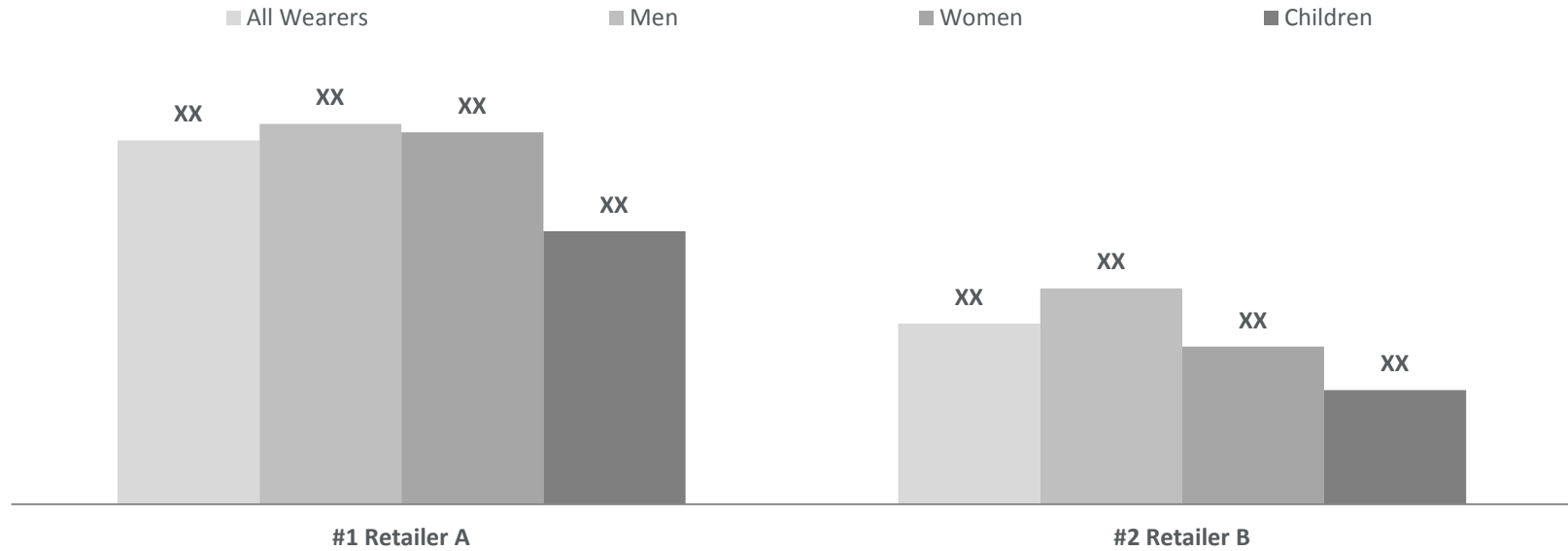


	#1	#2	#3
■ Dec 2015	XX	XX	X
■ Dec 2016	XX	XX	X

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Retailer A out-paces the market in both Men and Women's segments; Retailer B is under-developed in the women's segment

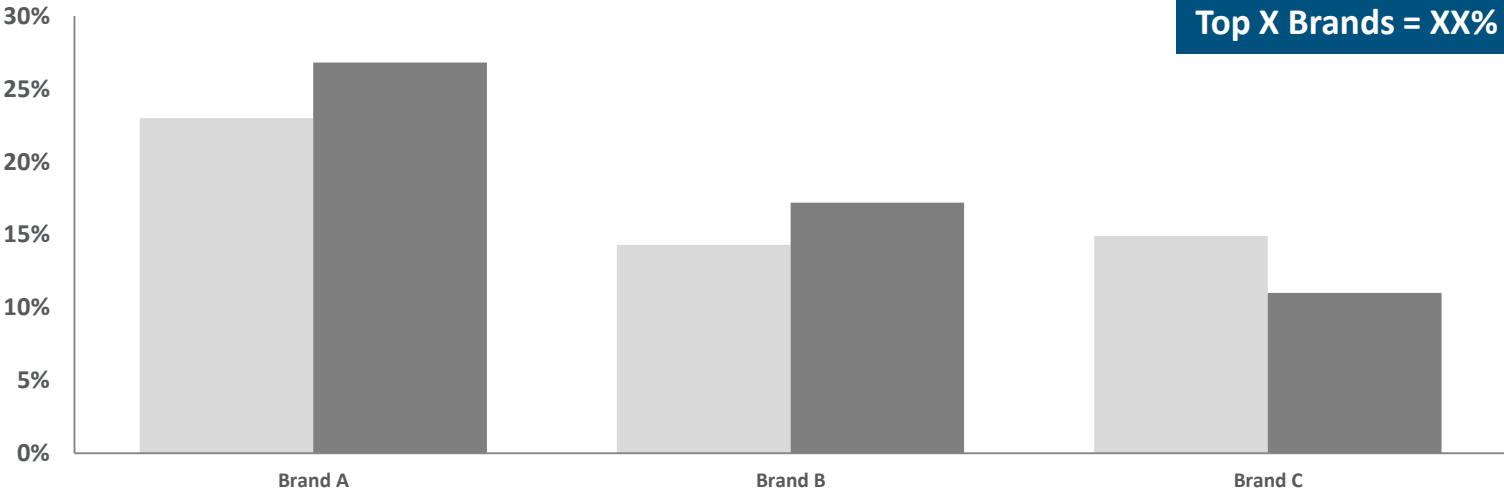
Category: Top Retailers – Consumer \$ Shares Within Key Market Segments
12ME December 2016



Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Brand A and Brand B gained share as the top 2 retailers; Brand C lost share

Category: Top 3 Brands – Consumer \$ Shares
12ME December 2016



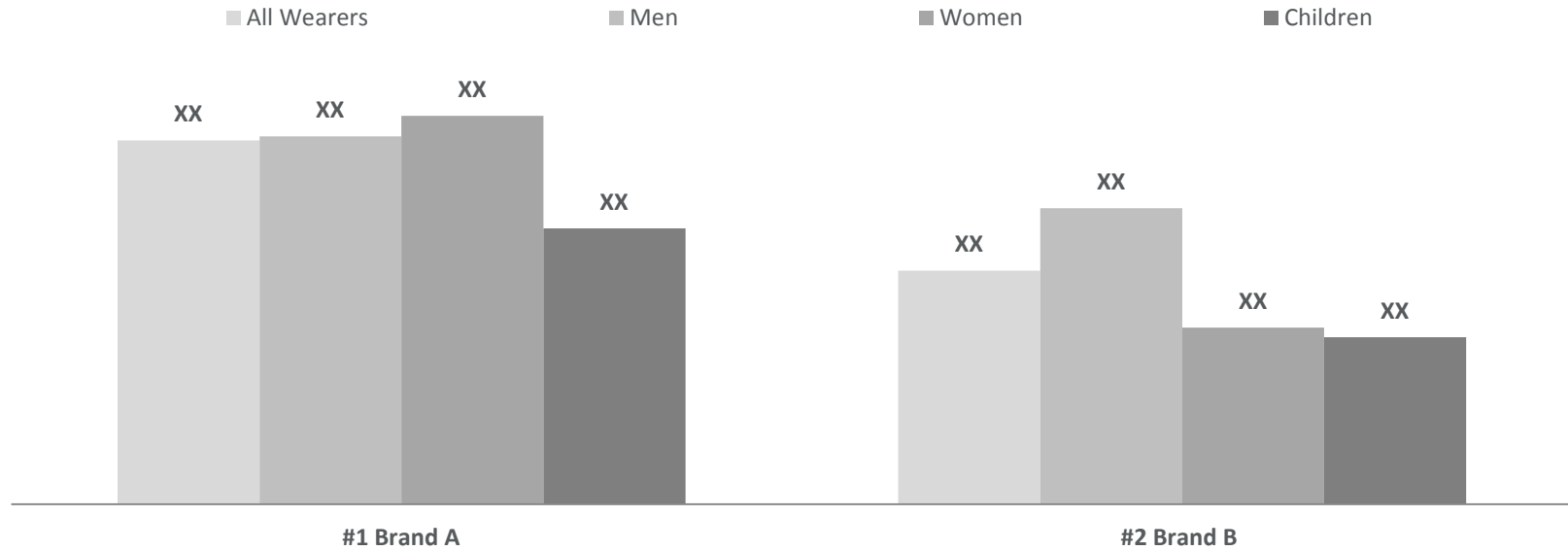
Top X Brands = XX%

	Brand A	Brand B	Brand C
	#1	#2	#3
■ Dec 2015	XX	XX	XX
■ Dec 2016	XX	XX	XX

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Brand A is ahead of the market in the Men's and Women's segment; Brand B is under-developed in the Women's segment

Category: Top Brands – Consumer \$ Shares Within Key Market Segments
12ME December 2016



Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Comfort and Price/Discounting are top reasons influencing Category Purchases

Category: Top factors Influencing Category Purchase
12ME December 2016

Total Market	Male Purchaser	Female Purchaser
<ul style="list-style-type: none">Comfortable	<ul style="list-style-type: none">Comfortable	<ul style="list-style-type: none">Comfortable
<ul style="list-style-type: none">Price/Special Offer	<ul style="list-style-type: none">Price/Special Offer	<ul style="list-style-type: none">Price/Special Offer
<ul style="list-style-type: none">Preferred Brand	<ul style="list-style-type: none">Quality	<ul style="list-style-type: none">Preferred Brand
<ul style="list-style-type: none">Quality	<ul style="list-style-type: none">Fashionable Look	<ul style="list-style-type: none">Functionality (Running, Training, walking, etc.)
<ul style="list-style-type: none">Fashionable Look	<ul style="list-style-type: none">Preferred Brand	<ul style="list-style-type: none">Quality

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Demographics: Category (Top Brands & Retailers)

	Total Category	Retailer			Brand		
		#1 Retailer A	#2 Retailer B	#3 Retailer C	#1 Brand A	#2 Brand B	#3 Brand C
Purchaser Age							
<24	XX%	XX%	XX%	X%	XX%	XX%	XX%
25-34	XX%	XX%	XX%	XX%	XX%	XX%	XX%
35-44	XX%	XX%	XX%	XX%	XX%	XX%	XX%
45-54	XX%	XX%	XX%	XX%	XX%	XX%	XX%
55-64	X%	X%	X%	XX%	X%	XX%	XX%
65+	X%	X%	X%	X%	X%	X%	X%
Purchaser Gender							
Male	XX%	XX%	XX%	XX%	XX%	XX%	XX%
Female	XX%	XX%	XX%	XX%	XX%	XX%	XX%
Household Income							
Under \$25,000	X%	X%	XX%	XX%	X%	X%	X%
\$25 - \$44,999	XX%	X%	XX%	XX%	X%	X%	X%
\$45 - \$54,999	X%	X%	X%	X%	X%	X%	X%
\$55 - \$69,999	XX%	XX%	XX%	XX%	XX%	XX%	XX%
\$70 - \$99,999	XX%	XX%	XX%	XX%	XX%	XX%	XX%
\$100,000+	XX%	XX%	XX%	XX%	XX%	XX%	XX%

Source: The NPD Group/Consumer Tracking Service 12 m/e December 2016

Question & Answer

Contact us



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