




daxueconsulting
beijing shanghai

THE LICENSED SPORTS MERCHANDISE MARKET

IN CHINA

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The licensed sports merchandise are booming in China



The demand for licensed sports merchandise is growing quickly in China



Basketball and football merchandise are the most popular sports goods



Design, quality and price are significant criteria for purchasing licensed sports goods



China's licensed sports merchandise market is dominated by large sports brands



The most popular sales channel of licensed sports merchandise is official websites of sport brands

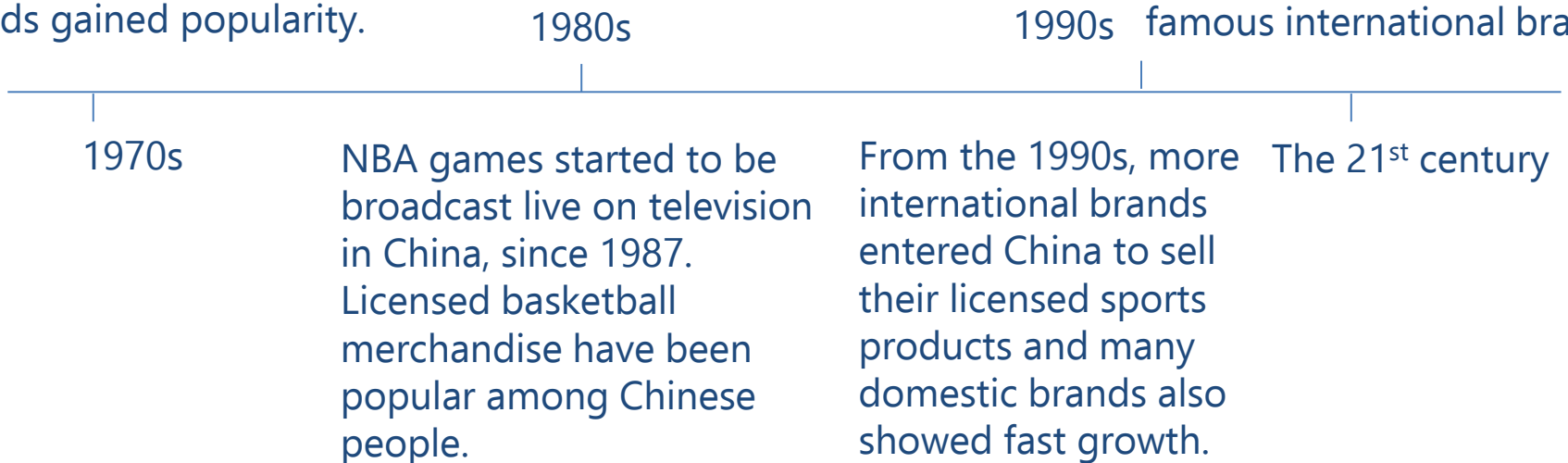
History of the licensed sports merchandise market in China

Licensed sports merchandise have been popular among Chinese consumers since many games started to be broadcasted live on television in China (such as NBA and World Cup).

Large International brands are leading the sports merchandise market in China because they have many famous sports stars as spokespeople. However, Chinese brands also have been developed rapidly in recent years.

Due to the policy support for the sports industry in China, Chinese licensed sports merchandise brands have had the strength to compete with famous international brands

After the reform and opening up, China's teams started to attend the Olympics and sports brands gained popularity.



Market drivers for international brands in China

1.

China's consumption upgrade increases the sales of expensive licensed sports merchandise

2.

International athletes (especially basketball and football) have large fan bases in China

3.

International sports brands are very popular among Chinese consumers for their cool designs and high-end images

4.

Chinese versions of official websites can help many international brands attract local consumers

5.

Social media platforms (Weibo and WeChat) and KOLS are useful to engage with Chinese consumers

CONSUMPTION ANALYSIS

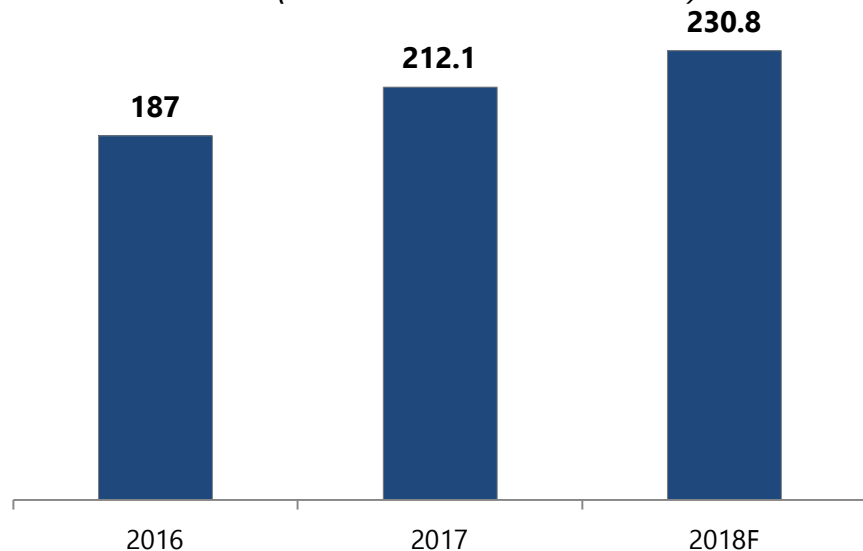


Consumption and market size in China

Sports apparel and footwear are both very important segments of the licensed sports merchandise industry in China.

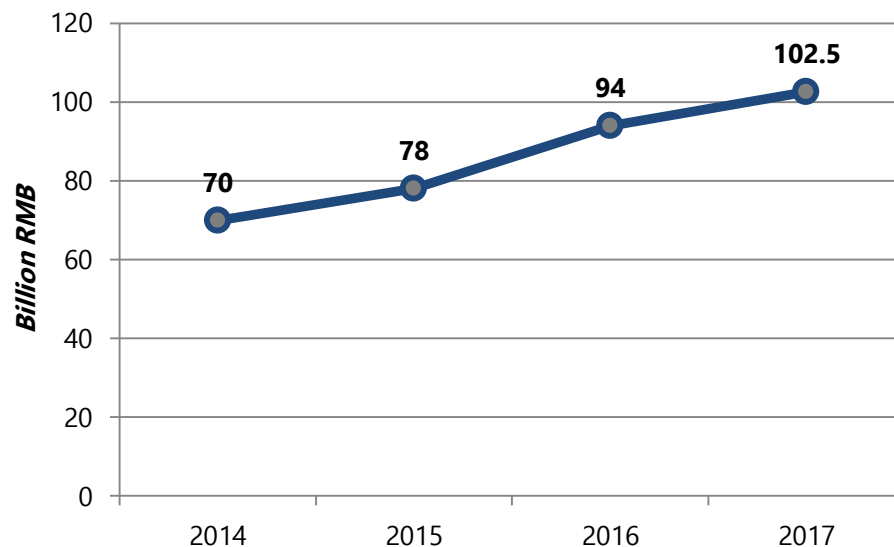
The market size of sports apparel and footwear has been growing rapidly in recent years, since the increasing popularity of sports among Chinese people and China's increasing fan base of famous sports players.

Market size of sports apparel in China (billion RMB – 2016-2018)



Source: Forward-The Economist

Market size of sports footwear in China (billion RMB – 2014-2017)



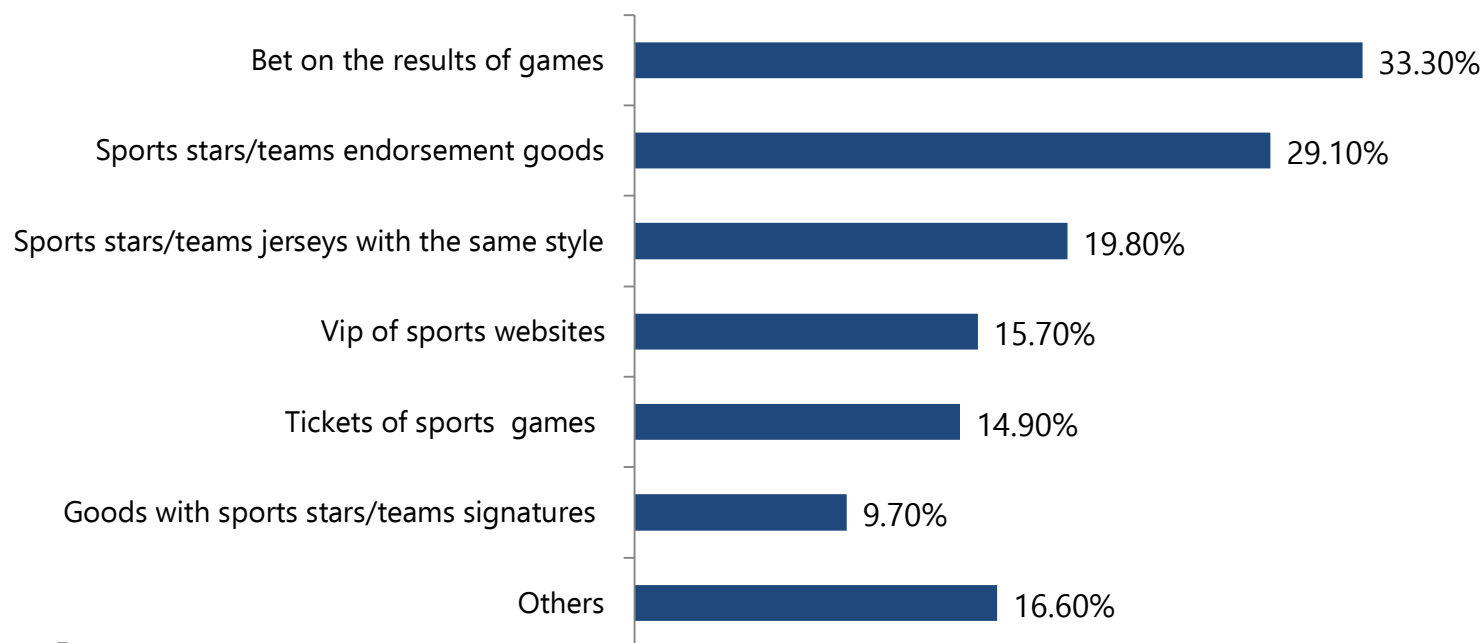
Source: Forward-The Economist

Consumer analysis: Licensed sports merchandise are very popular

Among all types of sporting goods, the most popular sports goods in China are licensed sports merchandise (except bet on the results of games), such as endorsement goods, jerseys and autographed products. It means the demand of licensed sports merchandise is large among Chinese consumers.

Survey about the sports consumptions in China

(2018)



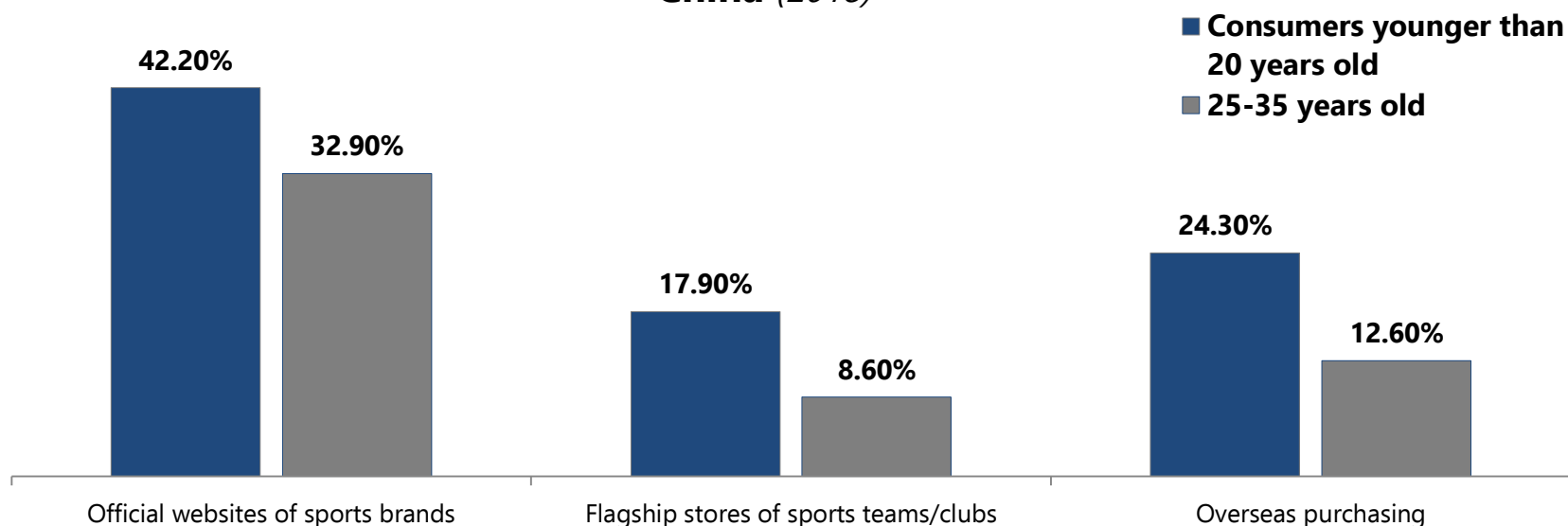
Source: The 2018 white paper of the basketball industry in China

Consumer analysis: Young people buy sports goods mostly from brands' websites

For young Chinese people, sports brand's official websites is the most popular way to purchasing sports merchandise in China.

Overseas purchasing is also important for young consumers and most of them pay great attention to the sports merchandise (mainly jerseys and shoes) that sports stars wear / promote.

The main platforms of young people purchase sports merchandise in China (2018)



Source: The 2018 white paper of the basketball industry in China

Baidu Index – Interest trends toward the segments (1/2)

The number of searches of **sports apparel** increased during the August 2018 because of the BWF World Championships and the Asian Games.

The search index of **sports footwear** sharply increased during February and March 2018, since many brands release new arrivals in the Spring.

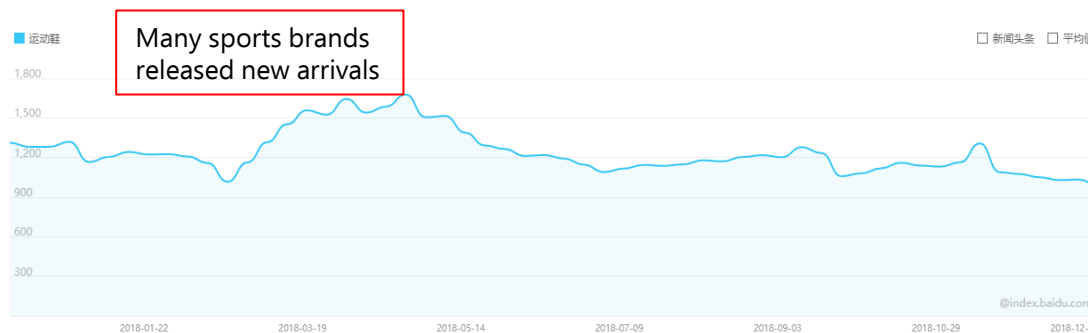


Baidu is the #1 search engine in China. The volume of search (more than ¾ of the total search made on Chinese Internet) exhibits the market digital trends

The search frequency of “sports apparel” in 2018 on Baidu index



The search frequency of “sports footwear” in 2018 on Baidu index



Baidu Index – Interest trends toward the segments (2/2)

The number of searches of “**FC Barcelona football shirts**” rapidly increased from June after the FC Barcelona released its new jersey. The number of searches of “**Kobe basketball shirts**” reached the highest point in December 2017 when the Lakers retired Kobe’s number.



Baidu is the #1 search engine in China. The volume of search (more than ¾ of the total search made on Chinese Internet) exhibits the market digital trends

The search frequency of “FC Barcelona football shirts” in 2018 on Baidu index



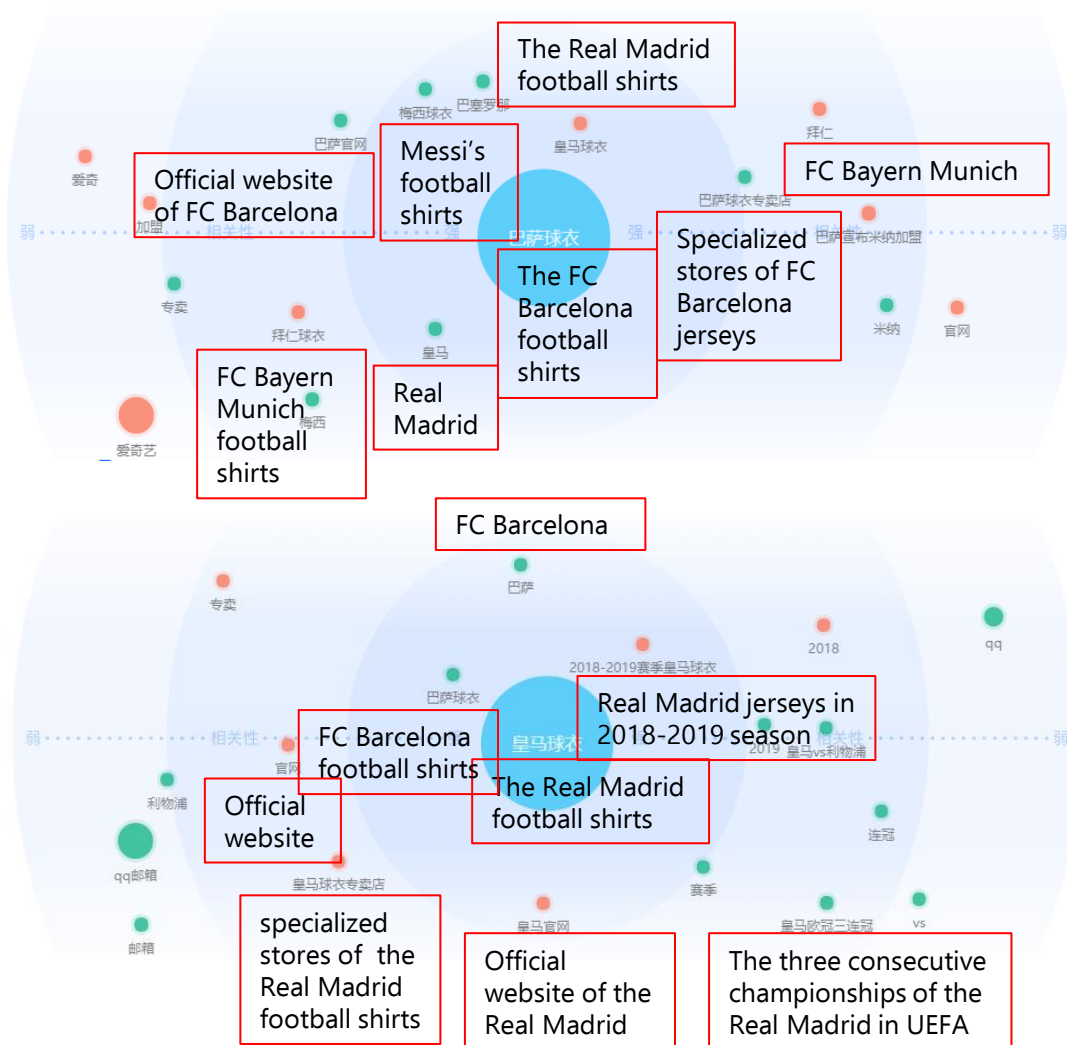
The search frequency of “Kobe basketball shirts” in 2018 on Baidu index



Baidu Index – Semantic analysis (1/2)

The most related keywords to “the FC Barcelona football shirts” are “the Real Madrid football shirts”, “Messi football shirts”, “the official website of FC Barcelona” and “specialized stores of the FC Barcelona football shirts”.

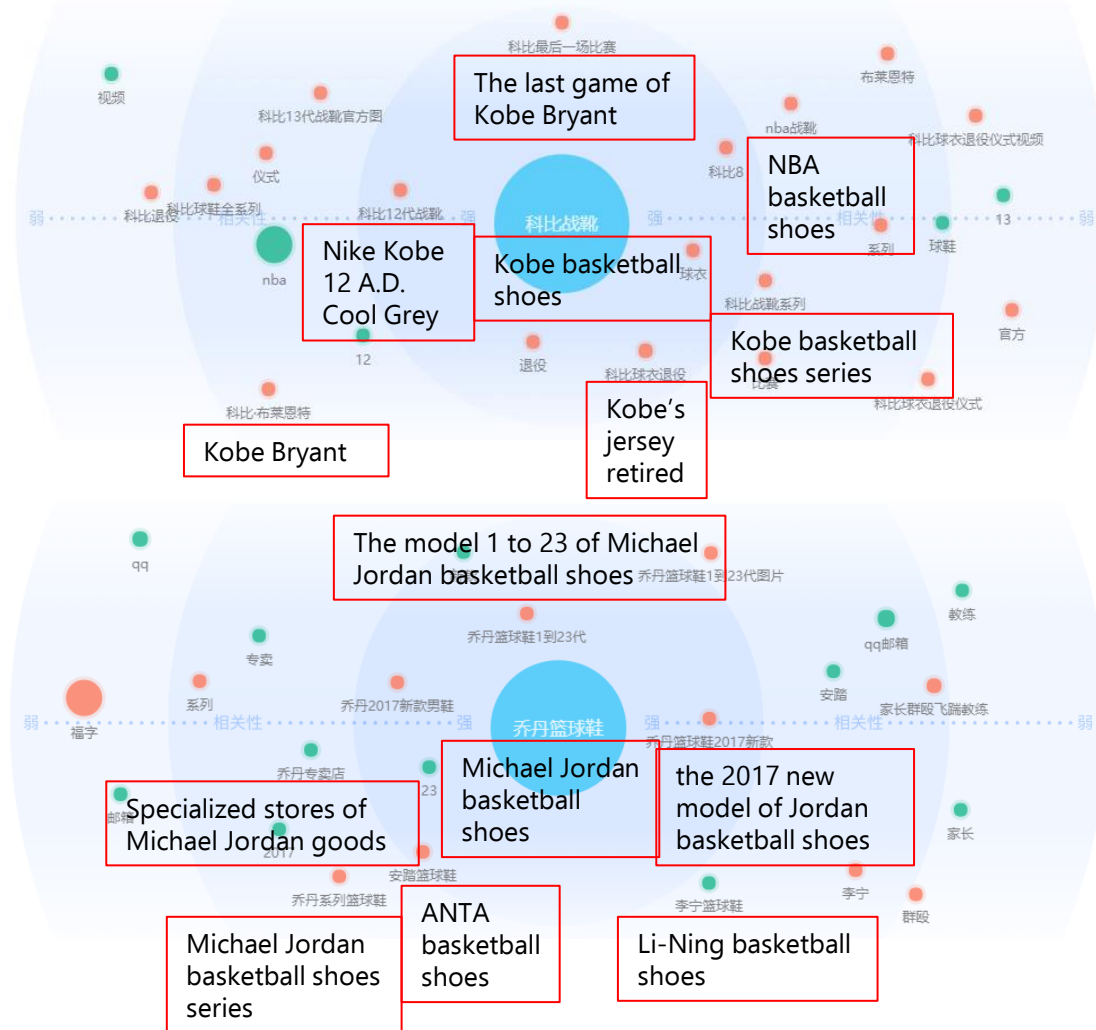
The most related keywords to “Real Madrid football shirts” are “FC Barcelona football shirts”, “2018-2019 season Real Madrid football shirts” and “official website of Real Madrid”.



Baidu Index – Semantic analysis (2/2)

The most related keywords to “Kobe basketball shoes” are “Nike Kobe 12 A.D. Cool Grey”, “Kobe’s jersey retired”, “the last game of Kobe Bryant” and “Kobe basketball shoes series”.

The most related keywords to “Michael Jordan basketball shoes” are “the 2017 new model of Jordan basketball shoes”, “the model 1 to 23 of Michael Jordan basketball shoes” and “ANTA basketball shoes”.



Consumers' the most common Questions

On Zhihu and other platforms the main questions and concerns about licensed sports merchandise consist of the following:

- 1) How / where to buy licensed sports merchandise in China?
- 2) How to figure out the authentic goods (shirts ,shoes and etc.)?
- 3) What are the most popular designs of sports merchandise?

知乎

Zhihu is the first Q&A website. in China, and has transitioned to a social media sharing platform gathering more than 100 million answers on various topics. The platform is especially relevant to reach higher-, well-educated social classes

国内能够买到安德玛 (UA) 库里篮球鞋么?

脆皮小艾, 自己选择的路, 跪着也要把它走完。-Weibo

网上确实有很多fake, 国内专柜也很少打折, 所以价格居高不下。但很多都有从国外回来的货, 成本就会低不少, 但还是不能贪便宜, 往往选择便宜两百的就会是假的。现在安德玛也是可以鉴定的, 自己可以了解一下

发布于 2016-01-06



怎么鉴定巴萨球衣真伪?

区庄蔡澜, 每天为忽悠自己而努力

我觉得鉴别球衣真假有两个好好用的方法 (不是从细节处说)

- 1、吊牌和洗水标的货号能否对得上球衣的货号
- 2、对比X宝有口碑的球衣店的价格



Can I buy the UA Stephen Curry basketball shoes in China?

There are many fake products online and brand counters seldom offer discounted goods. Thus, the price of real products is very high. However, many basketball shoes can be brought abroad and bring back China.

How to authenticate the real and fake FC Barcelona football shirts?

I believe there are two useful methods to figure out the real football shirts.

1. The number of washing label and tag on the shirts, are they the same with the serial number?
2. Comparing the shirts' price with the price from reliably online football clothes stores.

Consumers' feedback

On social media platforms (Weibo and WeChat), the consumers' feedback about licensed sports merchandise mostly focuses on the following aspects:

- Cool designs, including colors and styles
- Quality and new technologies
- Discount activities related to the licensed sports goods



Wechat is the #1 social media in China and an absolute must-have for a market entry promotion. It accounts for over 1 billion active users

全新的Messi16+足球鞋最特色之处是与之前的系列颜色极大不同的是彩用金铜色为主体，搭配黑色点状，球鞋鞋钉顶端则选用了契合绿色狂躁主题的绿色。整双球鞋展示出硬朗的气派，与众不同的尊贵和奢华的气质！超级惹眼和炫耀的视觉冲击！此款



The most special place of new Messi 16+ football shoes is that the shoes are using gold and copper with black as the main color, which is totally different from the earlier series. The top parts of the studs are green. The shoes are showing strong, honorable and luxurious temperament. The shoes have a very strong visual effect.

According to the Football Weekly, the new Real Madrid jersey used intense blue as the main color with bright starlight, which fully showed the good reputation of "Galactic warship" and Real Madrid's glorious history.



本泽马的快乐足球 🏆

足球周刊说“本次皇马球衣主体采用深邃的蓝色，搭配璀璨的星光，充分提现了俱乐部“银河战舰”的美称及辉煌的历史。”👀📍南京·南京林业大学



2018年12月21日 19:38 来自 HUAWEI Mate 9



Context of consumption in China

Based on the info from Chinese social media (Weibo and WeChat), there are 4 main goals for Chinese consumers to buy licensed sports merchandise:

1. Just for sports (such as basketball, football and etc.)
2. Following fashion and trends in China
3. Wearing sports clothes/shoes in daily life
4. Showing they are bright fans of some famous sports stars and teams.



The pictures have been taken from basketball goods stores and taken by a buyers of the Lakers jersey, then shared on Weibo. The buyer is a fan of NBA.



The picture has been taken from a buyer's home and shared on Weibo. The shoes are the C Ronaldo football shoes and the buyer is a fan of him.

Online trends: Consumer perception

On Tmall/Taobao and JD, most positive feedback focused on **good quality, good material, authentic goods, feel comfortable to wear/use** the goods and **fast delivery**. Negative feedback focused more on bad quality, fake products, high price, discoloration and slow delivery.

衣服舒适透气亲肤 面料不错 手感好的那种。可定制logo 质量好设计好看 购买的团购球衣很满意；



The football shirt has good air permeability, its material is also good, I feel smooth to the touch the shirt. Buyers can custom LOGO, its quality and design are both nice. I'm very satisfied with the shirts I purchased.



宝贝穿着很舒服 和图片一样的 质量很好 颜色好看 我很喜欢 跑步走路都很舒服

2018年12月06日 08:18 颜色分类: 白色中邦碎钉 鞋码: 33



I'm comfortable to wear the shoes, they are the same with their pictures, The product's quality and color are nice. It is very comfortable to run and walk with the shoes.



是正品, 质量好的没话说, 以后就你家了, 希望多给点优惠多多

2018年12月16日 21:27 颜色分类: 18款PD Team2#柄买1送7

The product is licensed, its quality is very good. I will buy more goods from this store in the future, hope have discount

前面印制的logo质量很差, 感觉穿不了多少次



The logo on the front side is very bad, I feel I can't wear it for long time.

掉色, 不能洗的衣服。



The shirt is losing colour, I can't even wash it.



物流太慢了, 中途物流停了几天, 快两个礼拜多才回来

2018年11月23日 21:16 颜色分类: AH2216 鞋码: 42[(US 8.5)]

目***则 (匿名)

The delivery is too slow, it was delayed for several days and the product took two weeks to arrive at my place.

COMPETITION ANALYSIS

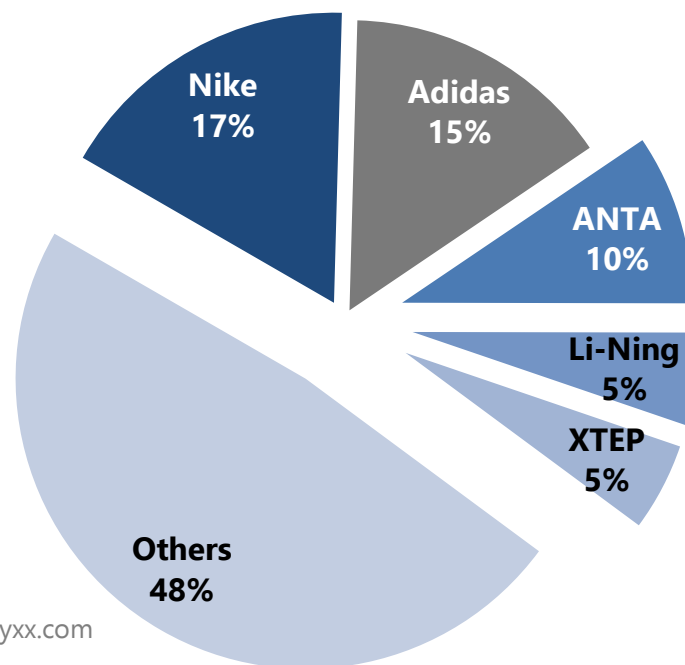


Market shares in China

In China, Nike, Adidas, ANTA, Li-Ning and XTEP are the top 5 leading brands of sports apparel and footwear market and their market shares are still growing.

Among them, international brands (Nike and Adidas) took more than 30% market share, they are more popular than domestic brands. However, the sales of Chinese sports brands also have increased greatly in 2017.

Market share of the leading sports apparel and footwear brands in China (2017)



Source: Chyxx.com

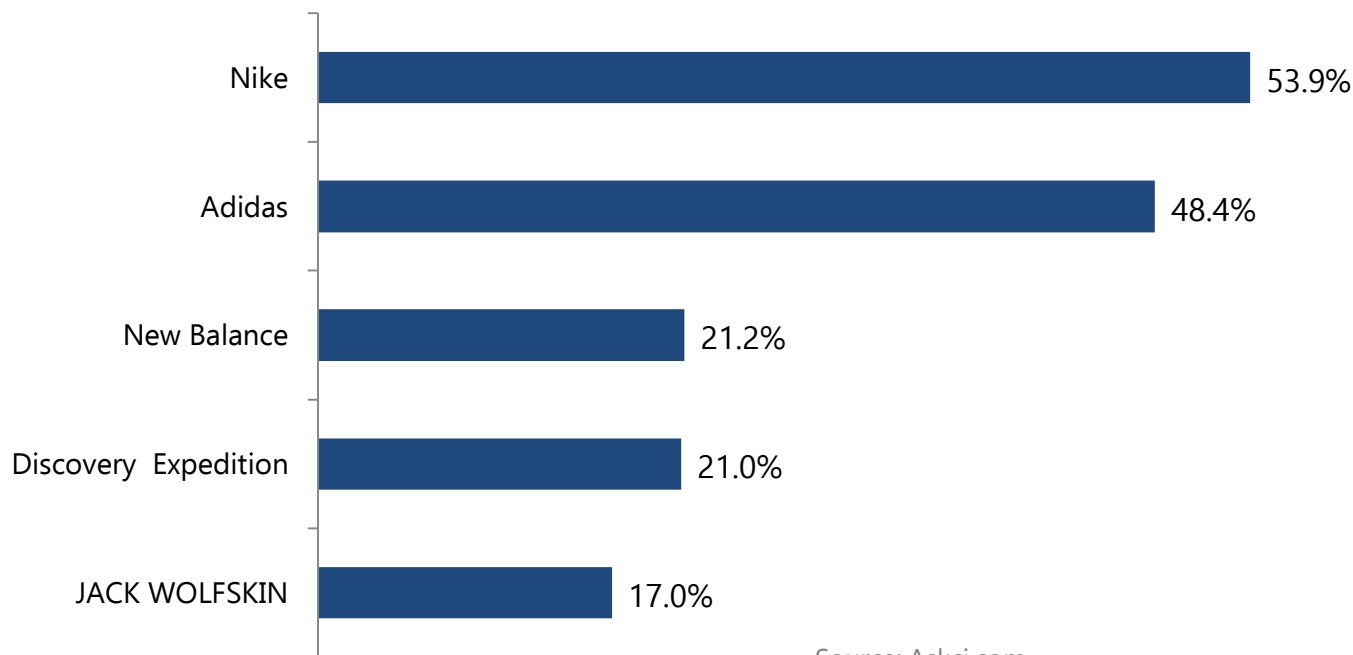
Competition analysis: The most popular foreign sports brands in China

Among large international sports brands, Nike and Adidas are the most popular for Chinese consumers and their popularity is much higher than other international sports brands.

The main reasons are attractive products, early market entry, leading edge technology, and collaborating with popular athletes and teams.

Chinese people's favorite international sports brands

(2017)



Source: Askci.com

Competition analysis: The top brands in China

Among the leading sports brands in China, Nike and Adidas had lots of sales in 2017, which was much higher than Chinese brands (ANTA and Li-Ning).

Basketball, football and running are the main sports sectors that are covered by leading brands, because they are the most popular/common sports among Chinese people.

Brands	International vs Domestic	Number of offline stores in China in 2017	Sales revenue in China, 2017 (RMB)	Sports sectors
Nike (耐克)	International	Around 8,000	217 billion	basketball, football, running, tennis and etc.
Adidas (阿迪达斯)	International	Around 9,000	164.4 billion	running, basketball, football, outdoor and etc.
ANTA (安踏)	Domestic	9,467	16.7 billion	basketball, running, football, tennis and etc.
Li-Ning (李宁)	Domestic	6,262	8.9 billion	basketball, football, running, badminton and etc.

Competition analysis: Basketball merchandise

For the basketball merchandise, most sales come from basketball shoes and NBA/CBA jerseys. The sales of international brands are relatively higher than domestic brands on Tmall/Taobao, for their high-end images, good design/appearance and collaboration with basketball stars who are famous in China.

Brands	International vs Domestic	Presence on Tmall/Taobao and JD	Sales on Tmall/Taobao in December 2018	Top seller price on Tmall	Price range on Tmall/Taobao (RMB)
Peak (匹克)	Domestic	Yes	63,300 items	159 RMB	59 to 4,870
ANTA (安踏)	Domestic	Yes	98,327 items	249 RMB	113 to 1,999
Adidas (阿迪达斯)	International	Yes	199,841 items	234 RMB	215 to 3,279
Air Jordan (乔丹)	International	Yes	149,033 items	159 RMB	99 to 28,650

Competition analysis: Football merchandise

For football merchandise, the prices of international brands are obviously higher than domestic brands on Tmall/Taobao, however, they are still very popular among Chinese consumers for their high-end images, exquisite appearance and collaboration with football stars who are very popular in China.

Brands	International vs Domestic	Presence on Tmall/Taobao and JD	Sales on Tmall/Taobao in December 2018	Top seller price on Tmall	Price range on Tmall/Taobao (RMB)
Li-Ning (李宁)	Domestic	Yes	43,938 items	125 RMB	27 to 1,126
Ucan (锐克)	Domestic	Yes	16,554 items	65 RMB	29 to 1,870
Nike (耐克)	International	Yes	36,029 items	299 RMB	39 to 2,553
Adidas (阿迪达斯)	International	Yes	42,007 items	209 RMB	59 to 2,999

Competition analysis: Swimming merchandise

Most swimming brands have built official stores on the main e-commerce platforms (Taobao/Tmall and JD) in China.

On Taobao/Tmall, the sales of domestic brands are higher than international brands, since their prices are relatively low.

Brands	International vs Domestic	Presence on Tmall/Taobao and JD	Sales on Tmall/Taobao in December 2018	Top seller price on Tmall	Price range on Tmall/Taobao (RMB)
361°	Domestic	Yes	35,928 items	44 RMB	9 to 1,832
Li-Ning (李宁)	Domestic	Yes	157,764 items	59 RMB	47 to 2,192
Arena (阿瑞娜)	International	Yes	31,931 items	129 RMB	29 to 7,150
Speedo (速比涛)	International	Yes	45,960 items	145 RMB	59 to 3,999

E-commerce landscape of basketball jerseys

As one of the most common licensed sport merchandise, basketball jerseys have quite large price range on Tmall.

The price is an important criteria for purchase, Chinese consumers prefer basketball shirts with low price.

Top selling SKU

- Qilifei (琪丽妃)
- 45 RMB

Price range of the category

- 33 RMB
- 2,999 RMB

Average price

- 117.5 RMB

Ratio top selling price vs average price

- 0.38
- Market is still driven by price

Most expensive SKU



Cheapest SKU



Top seller SKU



球衣篮球服套装男学生球服比赛湖人男士定制印字篮球队服背心
多色可选 免费送号 个性彩印 急速发货



Business cases – Nike (耐克)

Digital activity

On its official website, Nike mainly introduces its sports shoes and apparel by using products' pictures (dynamic pictures), design concept, advertising videos and online custom services.

Through the collaboration with well-known sports players and teams (such as the football player Neymar), the brand achieved high sales in China, especially during the Double 11 Shopping Carnival (the largest offline and online shopping day in China, launched by Taobao).



https://www.nike.com/cn/zh_cn/

Platform	Presence	Official account	Volume (sales, product reviews or traffic)
Nike.com.cn	Yes	Yes	67 million visits, monthly
Taobao/Tmall	Yes	Yes	4.91 million items, in November 2018
JD.com	Yes	No	More than 1 million comments
Kaola	Yes	Yes	649,429 followers
Pinduoduo	Yes	No	1,424 items, daily sales

Business cases – Nike (耐克) E-reputation

The most related keywords to “Nike” are “official website of Nike”, “sports”, “sports shoes with special price”, “Adidas” and “Adidas official website”

On social media platforms (WeChat and Weibo), Nike usually posts advertising videos and pictures to promote its main products (sports shoes and shirts), it also releases important sports news/events that related to the brand (some basketball teams start to cooperate with Nike).



Platform	Presence	Followers	Posting frequency in December
Wechat	Yes	83,275	10 posts
Weibo	Yes	1,152,608	0 post

Business cases – ANTA (安踏)

Digital activity

ANTA is one of the most popular domestic sports brands in China. The brand is targeting the mass market and it provides cost-effective sports merchandise to consumers.

The main content of ANTA's official website consists of popular products, technologies (such as enhance the elasticity of sports shoes) used by ANTA and important events/news.

By using Klay Thompson (famous NBA basketball player) as a brand spokesman, ANTA dramatically rose its sales revenue (16.69 billion RMB) in 2017.



<https://www.anta.com/>

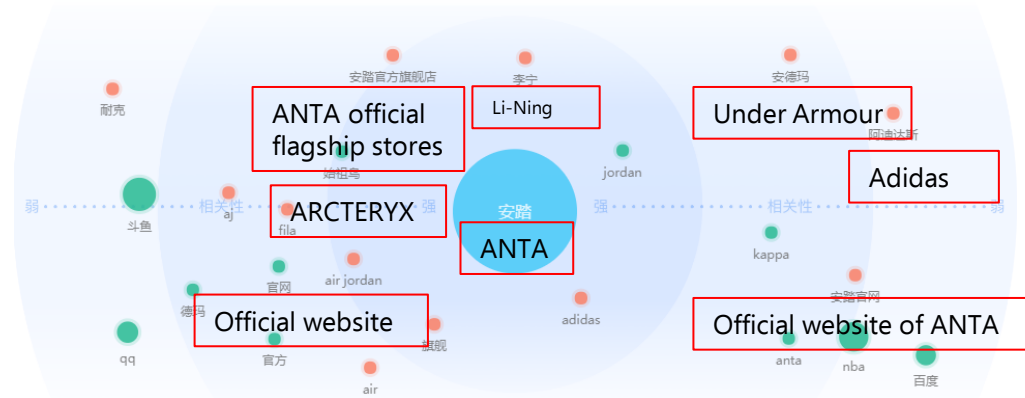
Platform	Presence	Official account	Volume (sales, product reviews or traffic)
Anta.com.cn	Yes	Yes	191,183 visits, monthly
Taobao/Tmall	Yes	Yes	5.21million items, in November 2018
JD.com	Yes	Yes	More than 1.5 million comments
Kaola	Yes	Yes	3,634 followers
Pinduoduo	Yes	Yes	5,240 items, daily sales

Business cases – ANTA (安踏)

E-reputation in China

The most related keywords to "ANTA" are "Adidas", "Air Jordan", "Li-Ning", "ARCTERYX" and "official flagship stores of ANTA".

On Chinese social media platforms (WeChat and Weibo), the brand mainly releases advertising videos, pictures and articles about new arrivals, important events and discount activities on their official accounts.



Platform	Presence	Followers	Posting frequency in December
Wechat	Yes	45,220	1 post
Weibo	Yes	115,285	22 posts

Business cases – Adidas (阿迪达斯)

Digital activity

As a very popular sports brand, Adidas has built close collaboration with many football and basketball teams (such as the Real Madrid) /players (such as Messi).

Adidas is targeting the young athletes, the brand offers sports apparel and footwear that mainly covered three sports sectors basketball, football and running.

The official website of Adidas released information about its products series, new arrivals and discount activities for the upcoming new year.



<https://www.adidas.com.cn>

Platform	Presence	Official account	Volume (sales, product reviews or traffic)
Adidas.com.cn	Yes	Yes	4.7 million visits, monthly
Taobao/Tmall	Yes	Yes	3.56 million items, in November 2018
JD.com	Yes	No	More than 2 million comments
Kaola	Yes	Yes	760,741 followers
Pinduoduo	Yes	Yes	894 items, daily sales

Business cases – Adidas (阿迪达斯)

E-reputation in China

The most related keywords to “Adidas” are “Official website of Adidas”, “Adidas Originals”, “Nike”, “Nike official website” and “Adidas official flagship stores”.

On Chinese social media platforms (WeChat and Weibo), Adidas frequently releases information about its seasonal arrivals, discount activities and brand spokesmen (popular sports stars and celebrities).



Platform	Presence	Followers	Posting frequency in December
Wechat	Yes	34,510	7 posts
Weibo	Yes	451,950	6 posts

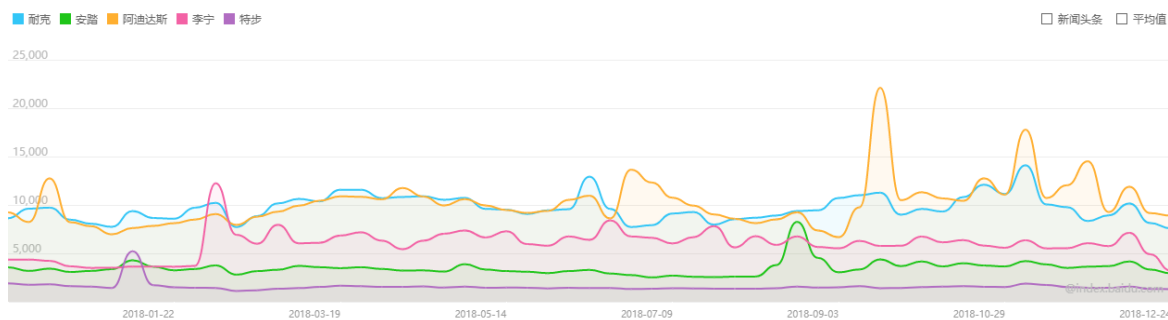
Comparing online interest for leading brands

On Baidu index, Adidas and Nike both showed higher search frequency, Li-Ning also had high search frequency and X-step showed the lowest search number during the past one year.

On WeChat index, Nike also showed the highest search index, which was much higher than other brands in last 90 days.

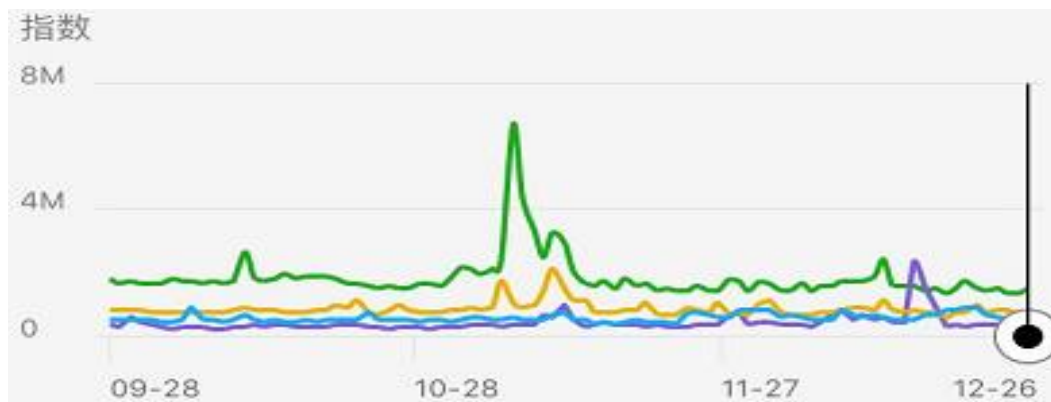
The brands searched are

- Nike
- ANTA
- Adidas
- Li-Ning
- X-step



The brands searched are

- Nike
- ANTA
- Adidas
- Li-Ning



Brand naming – case studies

The Chinese names of licensed sports merchandise usually have two types:

- 1) By using the names of famous sports players and teams, the brand can attract local fans and show their main products.
- 2) Through the names of strong animals (such as lions), international brands built strong and fast images for their products.

科比系列
(Kobe, Nike)

- “科比” is the Chinese name of Kobe (Kobe Bryant, the famous basketball player in NBA, also very popular in China) and “系列” means “series”.
- By directly using a sports star’s name, the brand attracted attention from numerous fans of Kobe.

雄狮
(Lion FG, Anta)

- “雄狮” is the Chinese translation of lion. In China’s culture, lion has the meanings of guarding / defend and strength.
- The name implies users will have enough strength to win the game if they have the products.

猎鹰
(Predator, Adidas)

- “猎鹰” is the Chinese name of “Falcon”.
- The name implies that users will be very fast and have quick acting during the game if they have the Predator shoes.

DISTRIBUTION & PROMOTION ANALYSIS



Online retail: Coverage in China

The number of sports merchandise brands on JD are far more than Tmall, mainly due to the higher requirements and deposit from Tmall for those brands want to enter the platform.

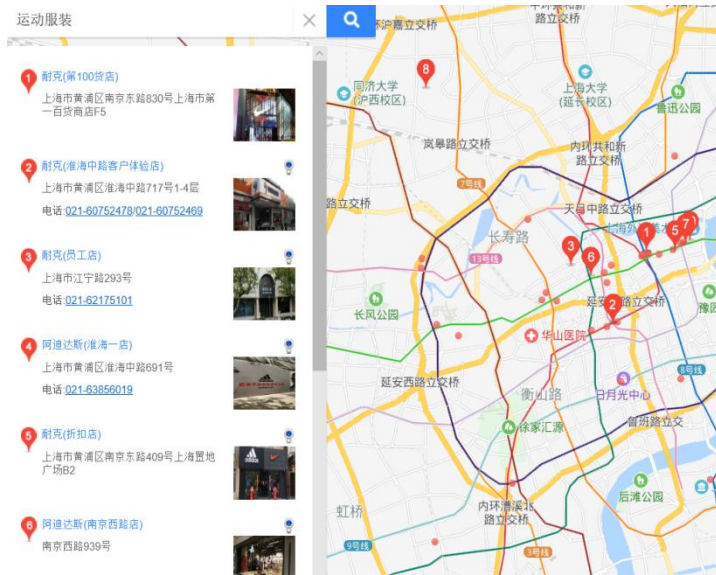
Many brands launched discount activities for the Christmas Day in December and the upcoming Chinese New Year.

Market segments	Number of brands selling on Tmall/Taobao	Number of brands selling on JD
Sports shirts	199	430
Sports shoes	199	426
Sports pants	199	665
Sports gloves	199	800

Offline retail: Coverage in Shanghai

Since the sports apparel is one of the most important segments of licensed sports merchandise, we use it as an example to find the offline distribution channels in Shanghai.

Brand stores are the most typical offline sales channels for sports apparel in Shanghai.



Baidu Map: 515 results



Dianping: 622 results

Brand stores	Number of stores in Shanghai
Adidas	315
Nike	273
ANTA	199
Li-Ning	122

On-the-shelf: representation of the category in stores

In China, people usually buy licensed sports merchandise in brand stores and brand counters in shopping malls.

In those places, licensed sports merchandise are placed on different shelves by different sports leagues (such as NBA and World Cup), famous players and teams. Besides, some stores show their products (sports apparel and shoes) by the Human Body Model.

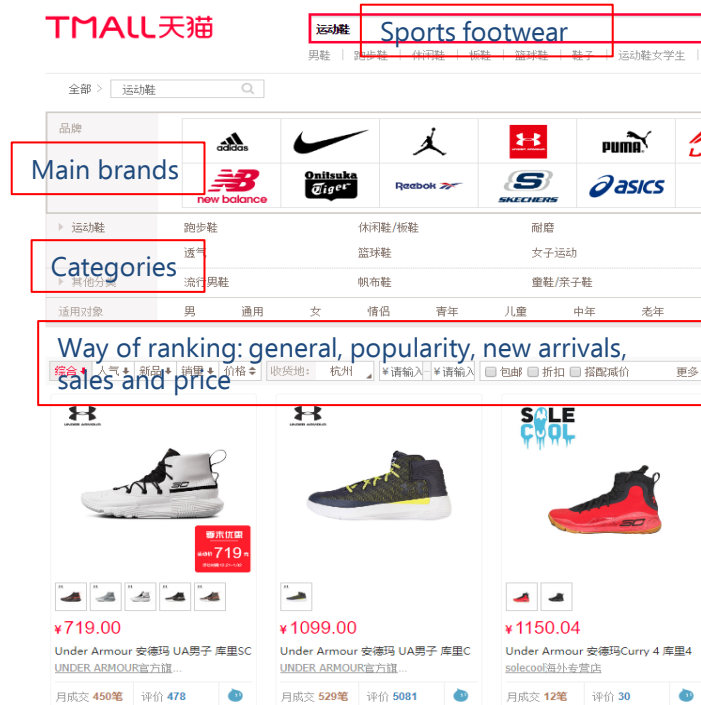


Online sales: volume assessment

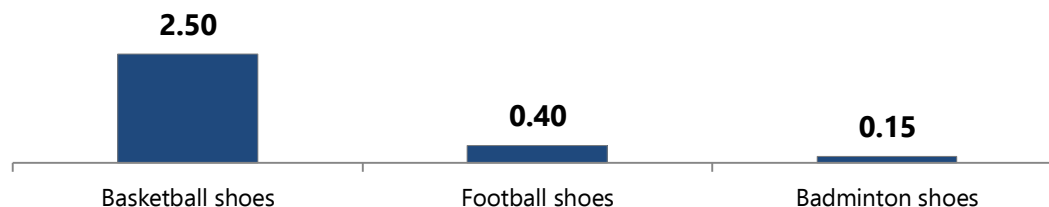


For sports footwear, basketball shoes showed high sales on Taobao/Tmall, which was far more than the sales of football and badminton shoes.

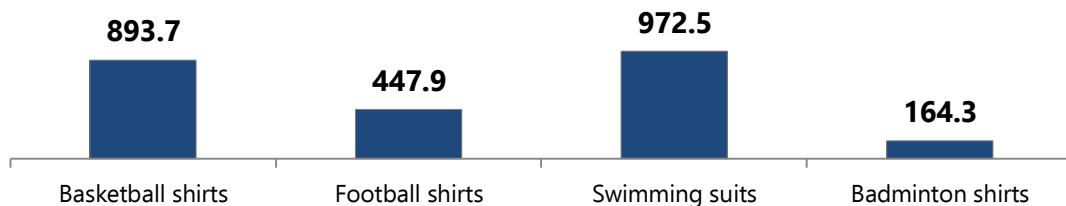
For sports apparel, swimming suits and basketball shirts both has very high sales on Taobao/Tmall in November 2018. Basketball products are the most popular sports merchandise among Chinese consumers.



Sold items of sports footwear on Taobao/Tmall
(million–November 2018)



Sold items of sports apparel on Taobao/Tmall
(thousand –November 2018)



Promotion channels to leverage for international brands in China

Dedicated Websites/Apps:

Ffok.cn (新主场)

X-Kicks.com (新新球鞋网)/ X-

Kicks.com app

Yoger.com (优个网)/

Yoger.com app

S.cn (名鞋库)/S.cn app

Specialized Magazines:

HOOP (灌篮)

Runner's World (跑步运动员的世界)

Digger (掘匠)

Football Weekly (足球周刊)



Ffok.cn (新主场) is a specialized football shirts website, the website mainly provides football teams' jersey to Chinese consumers and fans.



HOOP (灌篮) is an official NBA magazine that offers info about NBA teams and famous players to Chinese readers. Sports apparel and shoes are also mentioned by the magazine.

KOLs landscape in China

For international sports merchandise brands, Chinese KOLs are a huge part of modern Chinese product promotions and local consumers are influenced by KOL's shared introductions and opinions.

KOLs, who frequently post info about licensed sports merchandise, are sports KOLs, journalists, commentator and etc.

The Key Opinion Leader (KOL), or influencers, are a major part of the Chinese online journey, and therefore of the online marketing funnels for international brands in China. KOL will especially be as relevant to target niche audience (micro-KOL) and mainstream consumers (mass-market)



This is the Weibo account of a well-known basketball journalist, commentator and writer. He mainly posts info about famous basketball player, NBA and etc. His Weibo has 2,393,202 followers. One of his posts about Derrick Rose's basketball shoes received 1,311 likes and 3,291 shares.



This is a well-known sports KOL. His Weibo account has 3,158,455 followers. The KOL mainly posts news about football teams (focusing on Real Madrid) and famous football players. One of his posts about the new team uniforms of Real Madrid received 74 likes and 54 shares.

MARKET TREND ANALYSIS



MARKET TRENDS



Increased competition

- Large domestic sports brands have started to work with more international sports stars/teams and sell licensed sports goods, they are fighting for more market share against foreign brands (Nike, Adidas and etc.).



More market segments

- In order to meet the rising demand for sports merchandise, many sports brands have developed sports products target different age groups, such as children, teenagers and adults.



Fashion and sports

- Fashion design is one of the most important criteria for purchasing licensed sports merchandise in China. Chinese consumers usually favor international brands for their cool designs/appearance, thus, more domestic brands are also working on creative designs.

ABOUT US

Daxue Consulting is a market research Company dedicated to providing the best specially tailored, high quality, customer-specific data in one of the most challenging markets in the world; China.

We leverage our unique network of university organizations and professors, business associates, industry experts and foreign and local consultants to find the information you need efficiently, reliably and in a manner that addresses your specific needs. We excel because we're reliable, resourceful and flexible, everything that the Chinese market demands.



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