

SPORTS GOODS RETAILING – GERMANY – 2022

Sports goods will continue to benefit from consumer interest in health, fitness and athleisure. However, rising inflation levels will impact discretionary spending.



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Sports Goods Retailing – Germany – 2022

This report looks at the following areas:

- The impact of **inflation** and the **cost of living crisis** on the ability of consumers to purchase sportswear and sports goods
- The **importance of the online channel** for the purchase of sportswear and sports goods
- **Sustainability** and the response of the sector in terms of commitment to sustainable production
- **Key purchase drivers** for sportswear and sports goods
- The rise of **athleisure** and the **casualisation** trend
- Current and future **interest in the latest sporting technology innovations**



Sports goods will continue to benefit from consumer interest in health, fitness and athleisure. However, rising inflation levels will impact discretionary spending.

Overview

Driven by pandemic lockdowns and the closure of gyms and fitness studios, **home workouts surged in popularity**. Almost half of German consumers say they exercised/played sports at home in the last 12 months, putting the home significantly ahead of any other location used for exercise purposes.

Rising inflation rates will affect the ability of many German consumers to spend on discretionary categories such as sports goods, with some shoppers choosing to delay purchases or spread the cost of bigger-ticket items (eg treadmills, home gym equipment) over a period of time.

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As consumers focus on obtaining value when shopping, ecommerce giant Amazon will threaten the success of specialist retailers in certain sports goods categories, such as clothing and smaller-ticket sports accessories – particularly across subsectors where **brand is less importance than price**. For specialists, a focus on providing an **omnichannel** customer experience that includes **expert advice**, particularly for more niche sports/activities, will help create a more competitive retail offering.

With **78% of German sports goods shoppers** saying they are more likely to purchase sportswear that is versatile, the **athleisure** opportunity is a significant one, and brands are well placed to succeed if they offer sportswear ranges which are **as versatile as they are functional**.

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Report Content

EXECUTIVE SUMMARY

- Overview

Key issues covered in this Report

- The five year outlook for the sports goods retail market

Market context

- German consumers are being challenged by rising prices
- Obesity levels in Germany are rising
- An ageing population will impact the sports goods retail sector

Mintel predicts

- Market size & forecast
- Specialists recovered in 2021 following a pandemic-induced decline
- The sports goods retail market is expected to grow over the next five-year period

Opportunities

- Focus on opportunities in athleisure and versatile sportswear items
- Invest further in creating sportswear made from sustainable materials
- Utilise the power of social media to drive growth
- Recognise the potential offered by second-hand and product rental schemes

The competitive landscape

- Top two leading sports retail groups own almost half of the specialist market
 - Graph 1: leading sports goods specialists' estimated market share of total sports goods specialist retail sales, 2021
- Top two leading sports retail groups own almost half of the specialist market
- Quick download resources

MARKET DRIVERS

The German economy

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 2: key economic data, in real terms, 2019-23
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- The cost of living crisis is impacting German consumers...
- ...and affecting their spending on discretionary categories

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- Prices for food, fuel and energy are rising steadily
- Interest in health and wellness surges due to COVID-19
- Stock shortages are affecting most retail sectors
- As rising prices squeeze incomes, consumers are changing their spending behaviours

eCommerce

- Online is the most popular sales channel for sports goods
- Strong online growth across several categories

Health

- Germans are increasingly becoming overweight and obese
- Germany's obesity epidemic is worsening
 - Graph 3: trends in body mass index (BMI), 1999-2017
- Sports participation in Germany is generally high...
 - Graph 4: types of sports participated in during the last 12 months, NET, 2021
 - Graph 5: individual/keep-fit sports participated in during the last 12 months, 2021
- ...but gradually decreases with age
 - Graph 6: sports participation per type and age group, 2021
- Interest in leading an active lifestyle varies among German consumers

Population demographics

- Germany's population is ageing steadily
 - Graph 7: development of the old-age dependency ratio, 1991-2020
- Demographic changes will impact the sports goods sector

MARKET ACTIVITY

Sector size

- Following a pandemic-induced decline, specialists are bouncing back
 - Graph 8: retail value sales (€bn, excluding VAT) at sports goods specialists, 2017-21
- Specialists face stiff competition from online-only retailers

Market size and forecast

- The sports goods retail market is expected to grow in value...
- ...driven by consumer interest in health and fitness

Consumer spending

- Consumer spending on sports goods is driven by sales of equipment
 - Graph 9: estimated consumer spending on sports clothing, bikes and sports equipment, 2016-21
- Consumer spending on sports goods is driven by sales of equipment

WHAT CONSUMERS WANT, AND WHY

Places at which consumers have exercised/played sports

- German consumers show preference for exercising at home
 - Graph 10: places at which consumers have exercised/played sports in the last 12 months, 2022
- Almost one third of consumers do not exercise or play sports
 - Graph 11: places at which consumers have exercised/played sports in the last 12 months, NET, 2022
- Exercising at home is overwhelmingly popular among Gen Z consumers
 - Graph 12: places at which consumers have exercised/played sports in the last 12 months, by generation, 2022

Sports goods bought

- Sports goods bought in the last 12 months
 - Graph 13: sports goods bought in the last 12 months, 2022
- Target younger consumers that enjoy working out at home
- Reach older consumers through a focus on hiking gear and equipment

Methods by which sports goods were purchased

- Online is the most popular purchasing method among German consumers
 - Graph 14: methods by which sports goods were purchased in the last 12 months, 2022
- Appeal to younger consumers who are keen smartphone shoppers
 - Graph 15: methods by which sports goods were purchased in the last 12 months, by generation, 2022
- Almost three in four sports goods shoppers in Germany purchase online
 - Graph 16: methods by which sports goods were purchased in the last 12 months, 2022
- Strengthen the attractiveness of online offerings to appeal to shoppers

Retailers used

- Amazon tops the retailer leaderboard
 - Graph 17: retailers from which sportswear or sports footwear has been bought in the last 12 months, 2022
- Tap into opportunities to engage with parents of under-18s
 - Graph 18: retailers from which sportswear or sports footwear has been bought in the last 12 months, by parental status, 2022
- Cater to women that show preference for shopping at fashion retailers
 - Graph 19: retailers from which sportswear or sports footwear has been bought in the last 12 months, by gender, 2022
- Cater to women that show preference for shopping at fashion retailers
- Majority of shoppers stick to one retailer when shopping for sportswear
 - Graph 20: repertoire of number of retailers used to purchase sportswear or sports footwear in the last 12 months, 2022

Places at which sportswear or sports footwear has been worn

- Graph 21: places at which sportswear or sports footwear has been worn in the last 12 months, 2022

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- Recognise opportunities in athleisure
- Engage with shoppers that wear sportswear even when they are not exercising
 - Graph 22: places at which sportswear or sports footwear has been worn in the last 12 months, by places at which consumers have exercised/played sports in the last 12 months, 2022
- Cater to Gen Z shoppers that wear sportswear at work
- Promote the versatility of sportswear
 - Graph 23: repertoire of places at which sportswear has been worn in the last 12 months, 2022

Consumer behaviours in relation to purchasing sports goods

- Versatility is a major purchase driver for German sports goods shoppers
 - Graph 24: consumer behaviours in relation to the purchase of sports goods, 2022
- Appeal to gym-goers that like to buy the latest sportswear trends
- ...and show interest in purchasing from brands that that are affiliated with sports people or sports teams
 - Graph 25: places at which consumers have exercised/played sports in the last 12 months, by sports goods shoppers who have bought from sports goods brands that are affiliated with/endorsed by their favourite sports people/sports teams, 2022
- Capitalise on the strength of brand recognition
- Focus on building a brand reputation that is synonymous with quality
 - Graph 26: key factors* driving consumer behaviour around Value, 2022
- Utilise social media to drive growth...
- ...and create a sense of community
- Target young, urban shoppers that purchase endorsed sports goods through social media

Interest in sport- and sportswear-related innovations

- Interest in innovations is highest where sustainable materials are concerned
 - Graph 27: consumer interest in sport- and sportswear-related innovations, 2022
- Explore possibilities in equipment rental
- Invest further in sportswear made from sustainable materials...
- ...and ensure that shoppers are aware of the sustainability credentials of their purchases
- Respond to consumer interest in personalisation
- Capitalise on opportunities in wearable tech

RETAILER ACTIVITY

Leading retailers

- Intersport is pushed to second place by Sport 2000
- Specialists record strong post-pandemic recovery

Market share

- Two leading retail groups account for almost half of the specialist market

- Graph 28: leading sports goods specialists' estimated market share of total sports goods specialist retail sales, 2021

Online

- The online retail channel has achieved astonishing growth in recent years

Retail innovation

- Patagonia's 'Worn Wear Snow Tour' returns to Europe
- Decathlon moves into the rental market
- Adidas Terrex opens its first European flagship store in Munich
- Experiential retail reaches dizzying new heights
- Swapfiets partners with Levi Jeans
- Decathlon expands its 'Second Use' programme

Advertising and marketing activity

- Decathlon tell shoppers that 'this will be their year'
- Intersport highlights the importance of both equipment and mindset when running

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – CHAID Analysis methodology

- CHAID Analysis methodology

Appendix – market size and forecast

- Market size methodology
- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value

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