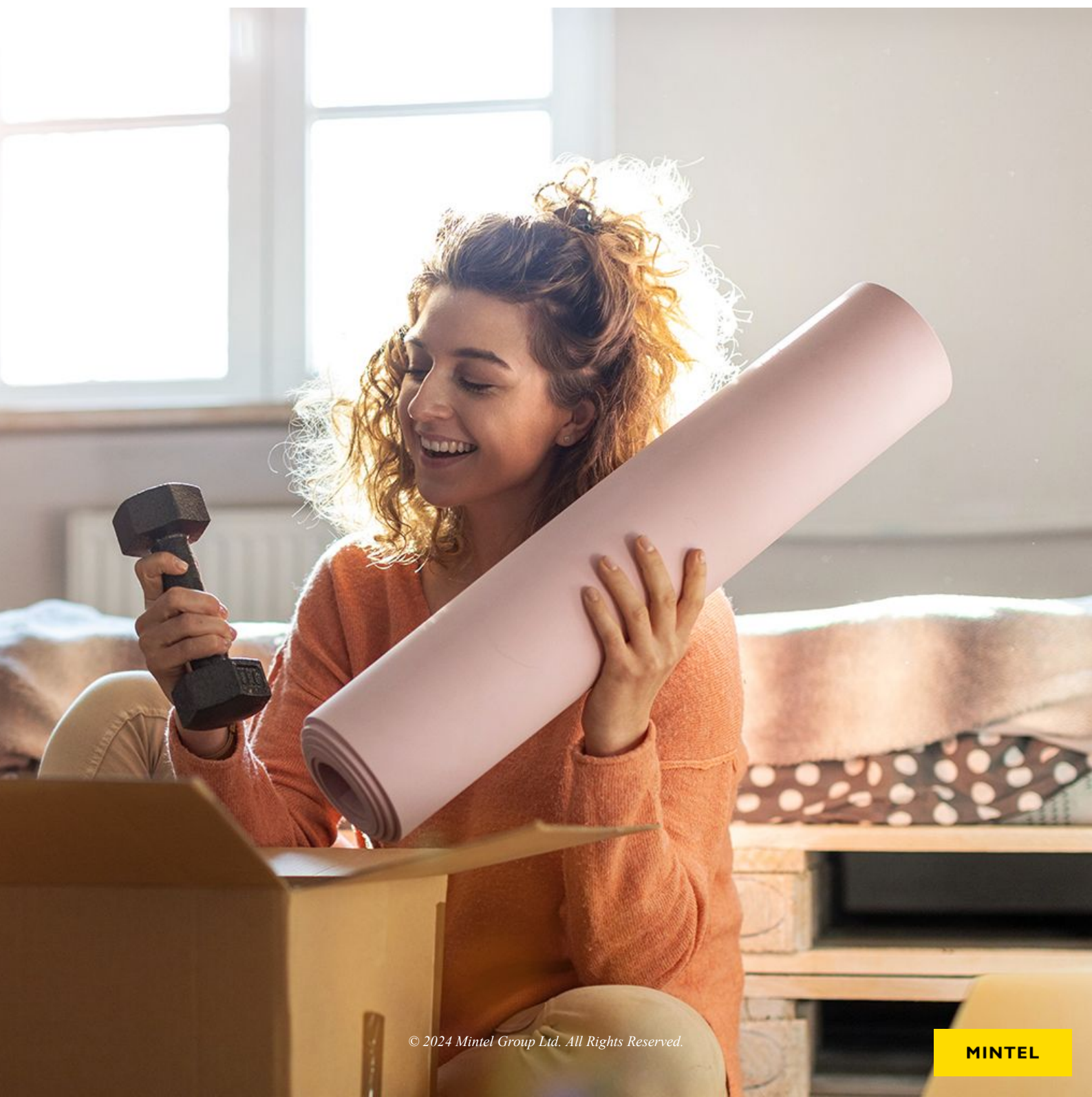


SPORTS GOODS RETAILING – GERMANY – 2024

Consumers' health and wellbeing concerns are driving the sports goods market, but retailers will be challenged to capitalise on their interest during 2024 sports events.



Armando Falcao,
Associate Director -
Retail Reports



Sports Goods Retailing - Germany - 2024

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
- **Key purchase drivers** for sportswear and sports goods
- **Leading retailers** used to purchase sportswear
- The relevance of **athleisure** and stronger pursuit of **health & wellbeing**
- Interest in **sports goods services** and **product development** from sports retailers



Consumers' health and wellbeing concerns are driving the sports goods market, but retailers will be challenged to capitalise on their interest during 2024 sports events.

Overview

Whilst consumers have become **increasingly concerned about their health and wellbeing** since the pandemic, driving sales of sports goods, exercising remains strongly **skewed towards the young and the wealthy**, with **51% of shoppers aged above 65** and **43% of lower-income shoppers** not having exercised in the last 12 months.

Despite the higher cost of living, **consumer spending on sports goods increased** by 10.4% in 2022 and is estimated to have risen by another 6.7% in 2023, with specialist sports goods retailers' sales rising at similar levels.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com | store@mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

MINTEL

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.



Although the last major football event hosted in Germany, the [2006 World Cup](#), sparked mass [euphoria](#), current [viewer numbers for football events are shrinking](#). Indeed, only [41% of Germans](#) plan to watch the 2024 UEFA European Championship hosted in Germany, so **to what extent consumer excitement can be boosted** will depend strongly on how well the team performs and whether retailers manage to engage with viewers.

Major sporting events in 2024 could result in sports goods retailers seeing another boost in sales, especially if brands can find ways to capitalise on the events by **engaging with buyers and attracting them to stores** through their interest in community hubs and in-store workout sessions to try new brands and products.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com | store@intel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Report Content



EXECUTIVE SUMMARY

- Overview

Key issues covered in this Report

- The five year outlook for sports goods retailing

Market context

- Retail sales grew 3% in 2023 mainly due to inflation
 - Graph 1: total retail sales, online and in-store (excl VAT), 2014-23
- Demand remains constrained due to high inflation
- Inflation has slowed but continues to impact consumption in Germany
 - Graph 2: harmonised consumer price index, by category, 2021-23
- Support Germans in sustaining healthier lifestyles

Mintel predicts

- Market size & forecast
- Spending on sports goods will see healthy growth moving forward
- Consumers' stronger interest in wellbeing will drive the sports goods market forward
- Cater to consumers' specific needs in health, wellness and exercise

Opportunities

- Encourage higher engagement with sports while supporting social health
- Target young men by combining exercise with gaming
- Entice parents with in-store try-outs and workouts with products from popular brands
- Appeal to those who exercise outside with higher circularity and rewards for sustainable behaviour
- Drive loyalty and sales by creating a buzz around the large sports events in 2024

The competitive landscape

- The two leading specialists attract 44% of consumer spending on sports goods
 - Graph 3: leading specialist retailers' estimated share of the sport goods retail market*, 2023
- Specialists enjoy strong pandemic-driven growth

MARKET DRIVERS

The German economy

- 2024 is expected to be more challenging than initially predicted
 - Graph 4: key economic data, in real terms, 2019-25

Sports Goods Retailing – Germany – 2024

- The inflation rate is slowly bouncing back to more-conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 5: financial confidence index, 2022-24
- Retail sales increased but Germans actually bought less in 2023
 - Graph 6: retail sales excluding fuel (excl VAT), 2016-24

Health and wellbeing

- Support shoppers to lead a more holistic healthy lifestyle
- Health becomes a greater priority even for cash-strapped consumers
- Health-conscious shoppers want fashionable clothing designed for physical activities
- Germans continue to face high obesity rates
 - Graph 7: proportion of those considered overweight and obese, by gender, 2021
- Offer inclusive sizing in sportswear to appeal to intimidated shoppers

2024 - a year of sport

- Football Championships present an opportunity to engage shoppers
- Great for hotels, food and drinks, challenging for retail footfall

eCommerce

- Online retail declined in 2023 but should grow again in 2024
 - Graph 8: online retail sales in selected categories, 2016-23

MARKET ACTIVITY

Sector size and forecast

- Sports goods retail sales continue to see healthy growth
 - Graph 9: specialist sports goods retailers' sales (exc VAT), 2016-23
- Despite the rising cost of living, specialists' sales surged in 2022 and rose a further 5% in 2023
- Sports goods retail will continue to see strong growth in coming years

Consumer spending

- Consumer spending on sports goods has been growing steadily
 - Graph 10: consumer spending on sports goods categories (incl VAT), 2014-23
- Sports equipment represents the largest portion of consumer spending on sports goods
 - Graph 11: consumer spending on sports goods categories (incl VAT), 2014-23
- Consumer interest in health and wellbeing is driving spending on sports goods
- Spending on sports goods to rise as Germans pursue more-active lifestyles

Channels of distribution

- Online is the preferred channel to buy sports goods in Germany
 - Graph 12: channels used to purchase sports goods, by age group, 2023
- Sports goods specialists can dazzle shoppers with their in-store experience

WHAT CONSUMERS WANT AND WHY

Exercise locations

- Sports and exercise play an important role in consumers' lives
 - Graph 13: whether and where consumers exercise, by age group, 2023
- Exercising and sports are strongly skewed towards the young
- Exercising is strongly skewed towards the young and wealthy
 - Graph 14: where they exercise, by monthly household income, 2023
- Women and older men are more likely to work out at home over other locations
 - Graph 15: where consumers exercised or practiced sports, by age and gender, 2023
- Entice home exercisers with equipment and accessories that help improve their performance
- Target young men by combining sports with gaming

Items purchased at sports goods retailers

- Trainers and jogging bottoms are the most popular sports goods categories
 - Graph 16: products consumers buy at sports goods retailers, 2023
- Even those who don't exercise will purchase sportswear and footwear
 - Graph 17: sports goods categories purchased, by where consumers exercise, 2023
- Target gym-goers and those who exercise in other fitness venues with exciting gear, accessories and equipment
- Entice women who exercise at home with versatile and fashionable sportswear to combine with leggings and jogging bottoms
 - Graph 18: sports goods categories purchased, by gender, 2023

Channels used to buy sports goods

- The omnichannel experience is essential for sports goods buyers
 - Graph 19: channels used to purchase sports goods, by age group, 2023
- Combine the online convenience of buying sports goods with dazzling experiences in-store
- Target those who exercise outdoors with exciting products in-store
 - Graph 20: channels used to purchase sports goods, by where they exercise, 2023
- Capitalise on enhancing the shopping experience across channels
- Entice online equipment buyers to add performance-boosting accessories and sportswear to their purchase
 - Graph 21: sports goods categories purchased, by channel, 2023
- Target online sports goods shoppers with sustainable sportswear from well-known brands

Where they buy sportswear and footwear

- Amazon is the most widely used retailer to purchase sports goods
 - Graph 22: retailers used to purchase sports goods, 2023
- Amazon is particularly popular to buy sports goods among Boomers
 - Graph 23: retailers used to purchase sports goods, by generation, 2023
- Shoppers enjoy the convenience of buying sports goods online, especially sportswear and equipment
- Target women who shop at fashion retailers with trendy, affordable sportswear
 - Graph 24: retailers used to purchase sports goods, by gender, 2023
- Entice women who shop at fashion retailers with trendy and affordable sportswear
- Branded specialists are strongly skewed towards wealthier sports goods shoppers
 - Graph 25: leading retailers' positioning by shoppers' average age and household income, 2023
- Health becomes a greater priority even for cash-strapped consumers
- Over half of sportswear shoppers stick to a single retailer
 - Graph 26: repertoire of sports goods retailers used, by age group, 2023

Where they wear sportswear

- Sportswear is worn predominantly outdoors but also at home
- Germans continue to wear sportswear even when they are not exercising
 - Graph 27: where sportswear is worn, by where consumers exercise/practice sports, 2023
- Tap into athleisure opportunities in clothing and footwear
- Explore Millennials' interest in sportswear for work
- Captivate men and wealthier shoppers with more versatile sportswear
 - Graph 28: repertoire of locations where consumers wear sportswear, by gender and monthly household income, 2023

Behaviours towards sports and exercising

- Two thirds of sports goods shoppers prefer branded sportswear
 - Graph 29: consumer behaviours towards sports and exercising, 2023
- Target gym-goers with branded sportswear that boosts their confidence
 - Graph 30: behaviours towards sportswear, by where consumers exercise/practice sports, 2023
- Confidence-boosting, branded sportswear will also attract younger shoppers
 - Graph 31: behaviours towards sportswear, by age group, 2023
- Charm parents with in-store workout sessions to try exciting new products tailored to families
- Appeal to younger men with versatile branded sportswear
 - Graph 32: consumer behaviours towards sportswear, by age and gender, 2023
- Branded specialists attract those who favour well-known brands and feel confident wearing their sportswear
- Target shoppers who favour well-known brands and feel confident wearing their sportswear
- Excite fitness venue-users with sustainable products for them to try in-store
 - Graph 33: consumer behaviours towards sportswear, by where they exercise/practice sports, 2023

Sports Goods Retailing – Germany – 2024

- Excite fitness venue-users with sustainable products for them to try in-store

What consumers want from sports goods retailers

- Offer sustainable products with inclusive sizing, in-store recycling and exciting loyalty schemes
 - Graph 34: what consumers would like to see at sports goods retailers, 2023
- Combine these elements to boost consumer interest and purchase
- Successful loyalty schemes must go beyond points, discounts and special offers
- Sustainability is crucial to attract younger sports goods shoppers
 - Graph 35: what consumers would like to see at sports goods retailers, by age group, 2023
- Bring wealthier sports goods buyers to the store with exciting new technology
 - Graph 36: what consumers would like to see at sports goods retailers, by monthly household income, 2023
- Target those who exercise outdoors with in-store recycling schemes and sustainability-linked loyalty rewards
 - Graph 37: what consumers would like to see at sports goods retailers, by where they exercise, 2023
- Engage with indoor fitness venue-goers by offering exciting product try-outs and promoting community exchange in-store
 - Graph 38: what consumers would like to see at sports goods retailers, by where they exercise, 2023
- Loyalty schemes and sustainable products are particularly important for branded sports goods specialists

RETAILER ACTIVITY

Leading retailers

- After overtaking Intersport in 2022, Sport 2000 saw sales decline in 2023
- Intersport and Sport 2000 performed differently in 2023, facing fiercer competition from Decathlon
- Intersport holds on to aggressive growth plan
- Sport 2000 maintains positive outlook despite seeing turnover decrease in 2023
- The "sports goods discounter" is gradually conquering the market with more sustainable products and services

Market share

- Together, the two leading specialists attract 44% of total sports goods sales
 - Graph 39: leading specialist retailers' estimated share of the sports goods market*, 2023
- Market share evolution

Retail innovation

- Globetrotter brings bicycle dealers into the store
- Decathlon offers Buy Back service in Germany
- Adidas combines innovation and sustainability in "Laundromat" concept store...
 - ...and opens a virtual pop-up store in partnership with Roblox
- Zalando is expanding its sports offering
- Enhance the in-store experience with technology and workout sessions
- Reebok is bringing experiential retail to new heights

Advertising and marketing activity

- Adidas Originals supports young creatives in finding their own way to exercise and play sports
- Intersport appeals to ski touring aficionados with Tour & Safety Days weekend in Obertraun
- Peloton's campaign with German football manager Jürgen Klopp engages with those who seek personalised exercise solutions

APPENDIX

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

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

Appendix – repertoire analysis methodology

- Repertoire analysis methodology

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value – consumer spending on sports goods
- Market size – value – specialist sports goods retailers' sales
- Market forecast and prediction intervals – consumer spending on sports goods
- Market forecast and prediction intervals – value – specialists' retail sales of sports goods

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com | store@mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850