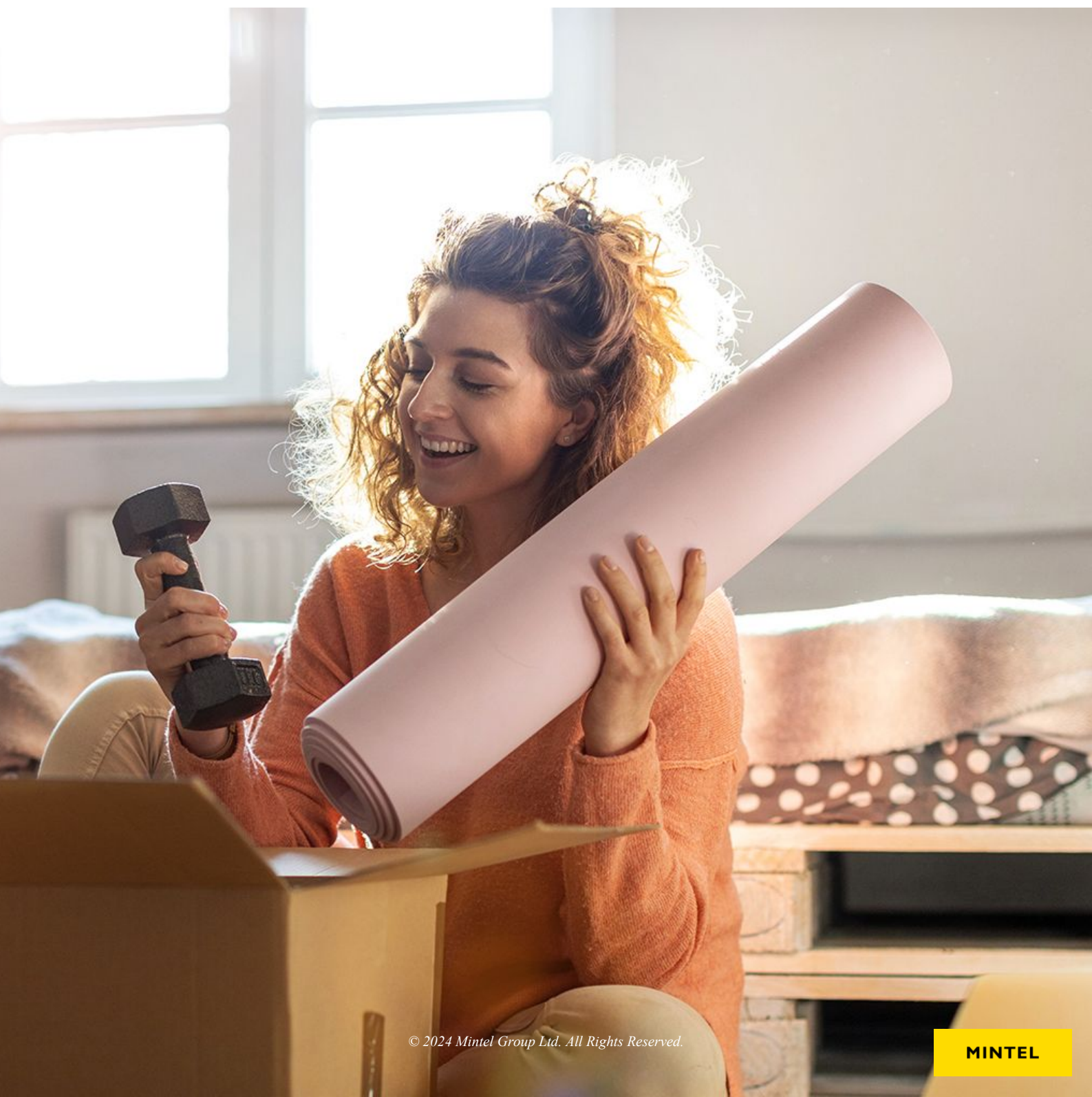


SPORTS GOODS RETAILING – GERMANY – 2024

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.

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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.

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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

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- Health-conscious shoppers want fashionable clothing designed for physical activities
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 - Graph 7: proportion of those considered overweight and obese, by gender, 2021
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2024 - a year of sport

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- 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
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 - Graph 10: consumer spending on sports goods categories (incl VAT), 2014-23
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 - Graph 11: consumer spending on sports goods categories (incl VAT), 2014-23
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- Spending on sports goods to rise as Germans pursue more-active lifestyles

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 - 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

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 - Graph 13: whether and where consumers exercise, by age group, 2023
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- Exercising is strongly skewed towards the young and wealthy
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- Target young men by combining sports with gaming

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 - Graph 16: products consumers buy at sports goods retailers, 2023
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 - Graph 17: sports goods categories purchased, by where consumers exercise, 2023
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- Entice women who exercise at home with versatile and fashionable sportswear to combine with leggings and jogging bottoms
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 - Graph 19: channels used to purchase sports goods, by age group, 2023
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 - Graph 22: retailers used to purchase sports goods, 2023
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 - Graph 29: consumer behaviours towards sports and exercising, 2023
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 - Graph 31: behaviours towards sportswear, by age group, 2023
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- Excite fitness venue-users with sustainable products for them to try in-store

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- 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
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- Sustainability is crucial to attract younger sports goods shoppers
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 - Graph 36: what consumers would like to see at sports goods retailers, by monthly household income, 2023
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 - 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

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