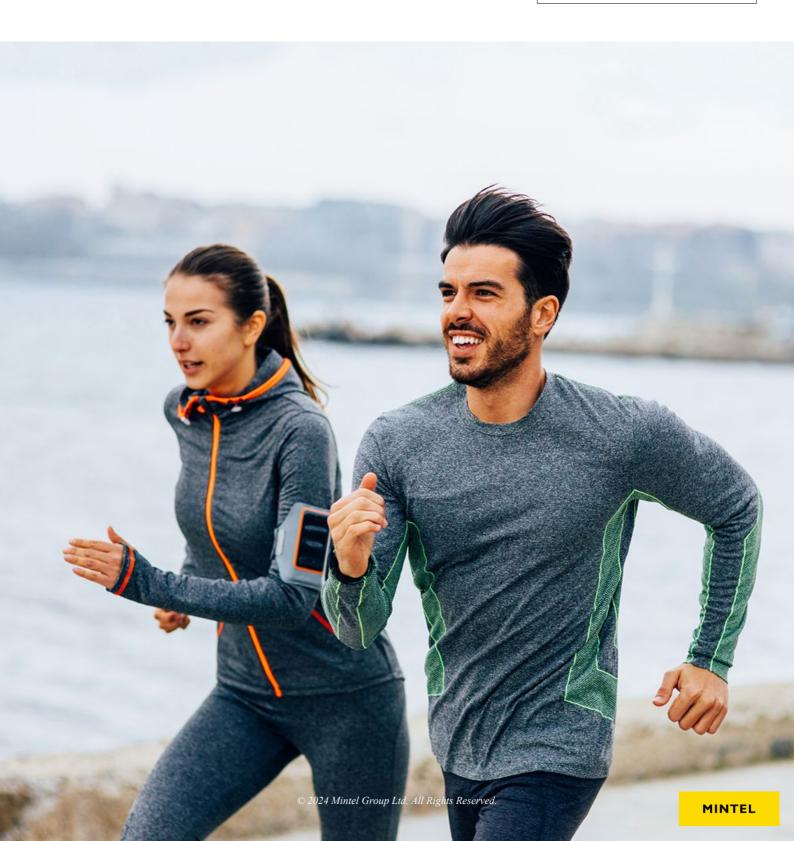
SPORTSWEAR – GERMANY – 2023

Sportswear has become an increasingly important segment in the fashion sector, due in part to the rising use of sportswear in everyday life.





Sportswear - Germany - 2023

This report looks at the following areas:

- Exploration of the lasting effects of the pandemic and of the rising cost of living on the sportswear market
- Development of sports participation and the effect on sportswear purchases
- Types of sportswear bought and activities they were bought for
- Analysis of purchase drivers for sportswear
- Leading retailers and competitive strategies for sportswear
- The growing importance of sportswear in everyday fashion
- Interest in innovations in sportswear including the use of technology, new strategies for sustainability and virtual marketing tools



Almost a quarter (24%) of Germans who bought sportswear in the past year did not buy it for exercising but to wear in daily life. **Sportswear was bought for daily wear more often than for biking or team sports and almost exactly as much as for yoga or fitness** (26%).

The sportswear industry has demonstrated resilience in spite of escalating prices of raw materials and inflation. Even with the increased cost of living, **consumers continue to** (cautiously) spend on sportswear as the trend towards healthy lifestyles strengthens and the lines between sportswear and fashion continue to blur.



Sportswear has become an increasingly important segment in the fashion sector, due in part to the rising use of sportswear in everyday life.

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Despite the growing market, **the rising cost of living is leading more consumers to switch** to cheaper offers and no name brands. About half of 16-34 year olds have already switched to cheaper brands and more may follow, even though two thirds of that group actually prefer well-known sports brands.

Sportswear that is worn for exercise indoors and outdoors should prioritise functionality and customisation to individual preferences as well as introducing new and sustainable fabrics and technologies. Updating sportswear basics with materials that are recycled, made from plants or offer wellness benefits like cooling properties are a way to stay relevant and on top of the game.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- · The five year outlook for sportswear

Market context

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 - Graph 1: sales of clothing and sportswear at specialist retailers, 2018-23
- Growth anticipated in sportswear and sporting goods market despite economic challenges
 - Graph 2: turnover from retail sales of sporting goods, 2014-22
- · Rising prices and inflation affect the sportswear industry and its customers
 - Graph 3: price index, selected sports clothes, 2020-22

Mintel predicts

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 - Graph 4: active participants in selected sports, 2017-20
- Sportswear will continue to blend into everyday fashion
 - Graph 5: activities for which sportswear items have been bought in the past 12 months NET, 2023
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 - Graph 7: interest in smart sportswear that tracks training results, by gender and age, 2023
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 - Graph 8: activities sportswear was bought for, by age, 2023
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- · ...impacting financial wellbeing and consumer expenditure

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- Target higher income consumers with sportswear that offers personalised features
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- · Decathlon to become multi-brand marketplace
- · adidas counts its losses after Yeezy crisis
- · Leading retailers

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- · Strengthen consumer bonds through performance-base rewards
- · Link popular topics like gender equality to sports to take a stand
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- Appeal to older consumers by using older models as athletic role models

Sportswear – Germany – 2023

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- · Use the metaverse and games as a marketing platform

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

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