

# 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.



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# 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



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

## Overview

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.

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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

- Sportswear is a beacon of resilience amidst fashion industry challenges
  - 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

- Individual outdoor sports to see further growth as people seek to reduce stress and find relaxation in nature
  - 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
- Sustainable innovations will motivate future shoppers

### Opportunities

- Capitalise on increasingly holistic lifestyles
- Collaborating with esport brands and teams can boost sales
  - Graph 6: esport watchers who bought a certain brand's product because of the partnership between a professional video game player/team and a brand, by gender, 2022
- Appeal to young men with smart sportswear
  - Graph 7: interest in smart sportswear that tracks training results, by gender and age, 2023
- Embrace collaborations as a way to capitalise on the athleisure wear trend
  - Graph 8: activities sportswear was bought for, by age, 2023
- Market vintage sportswear as a great way to save and be sustainable

## MARKET DRIVERS

### The German economy

- The German economy slips into a technical recession
  - Graph 9: key economic data, in real terms, 2019-24

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- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

## Inflation in sportswear

- Rising prices and inflation affect the sportswear industry and its customers
  - Graph 10: price index selected sports clothes, 2020-22

## Sports participation

- The pandemic boosted Germans' preference for individual outdoor sports
  - Graph 11: active participants in selected sports, 2017-20

## Health and wellbeing

- Support consumers to fulfil their health and wellness goals

## Athleisure trend

- Monetise the athleisure trend through collaborations
  - Graph 12: activities sportswear was bought for, by age, 2023

## Sustainability

- Highlight the importance of sustainability in sportswear

## Ageing society

- Sports participation declines with age...
  - Graph 13: general and regular sporting activity in total and by socio-demographic characteristics, 2022
- ...but the total number of athletic seniors is going up

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### Market size

- Sportswear more resilient than fashion sector overall
  - Graph 14: sales of clothing and sportswear at specialist retailers, 2018-23
- Sporting goods retailing was able to withstand the pandemic turmoil
  - Graph 15: turnover from retail sales of sporting goods, 2014-22

### Consumer spending

- A robust market with slow but steady growth following a recent boom
- Target higher income classes as they take the lead in sports participation
  - Graph 16: exercise frequency in the last 12 months – NET, by household net-income, 2022
- Expand into the increasingly valuable sneaker business
  - Graph 17: consumer price index, selected values, 2020-22

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- Analyse your customer base to provide the ideal channel mix
  - Graph 18: ways sportswear was purchased in the past 12 months, 2023
- Improve the online experience as buyers go multi-channel
  - Graph 19: channels that sportswear was bought through – NET , 2023
- Target young women with trendy online experiences

## WHAT CONSUMERS WANT AND WHY

### Sportswear items purchased

- Capitalise on the popularity of versatile activewear items
- Financial advantages fuel active lifestyles and sportswear purchases
  - Graph 20: sportswear items bought, by net household income, 2023
- Captivate trend-savvy young men with new sneaker styles
- Offer sports tops and bottoms as must-have fashion basics for every day
- Men outpace women in buying sportswear items
  - Graph 21: repertoire of sportswear items bought in the past 12 months, 2023
- Cater to men with a wide selection of sport-related styles
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- Germans across all age groups often wear sportswear in daily life
  - Graph 23: activities for which sportswear items were bought in the past 12 months, 2023
- Market sportswear for everyday comfort
  - Graph 24: activities for which sportswear items have been bought in the past 12 months – NET, 2023
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### Retailers used

- Focus on well-known sports brands to engage with German consumers
- Form lasting bonds with sportswear consumers at a young age
  - Graph 26: repertoire analysis of number of sportswear retailers bought from, 2023
- Capitalise on the prestige associated with well-known sportswear brands
  - Graph 27: places that sportswear has been bought in the past 12 months, by household net income, 2023

### Attitudes towards sportswear

- Function trumps fashion when Germans shop for sportswear
  - Graph 28: behaviours towards sportswear, 2023

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- Develop new functionalities in sportswear with male consumers in mind
  - Graph 29: attitudes towards "When shopping for sportswear functionality is more important to me than style", by gender, 2023
- Use innovative functional materials to update sportswear basics
- Highlight long-term brand value to prevent consumers migrating to cheaper brands
  - Graph 30: consumers who have switched to cheaper sportswear brands/retailers in the past 12 months, by net household income, 2023
- Target young sportswear buyers with niche stores

## Interest in innovations

- Develop sportswear innovations based on sustainability and specific preferences
- Future-proof collections through sustainable high-tech fabrics
- Target higher-income consumers with sportswear that offers personalised features
- Target higher income consumers with sportswear that offers personalised features
- Introduce sustainable options to connect to eco-conscious sportswear buyers
- Market vintage sportswear to combine value with sustainability
- Offer rentals and repair services alongside second hand as a step towards a circular economy
- Aid eco-conscious and frugal consumers to extend items' lifetime
- Target young men with smart sportswear and gadgets
  - Graph 31: interest in smart sportswear that tracks training results, 2023
- High-tech wear
- Leverage cutting-edge technology and introduce AI-powered virtual try-ons

## RETAILER ACTIVITY

### Leading retailers

- Intersport reveals sustainability strategy
- Sport 2000 excels through outdoor and team sports
- Decathlon to become multi-brand marketplace
- adidas counts its losses after Yeezy crisis
- Leading retailers

### Advertising and marketing activity

- LVMH to sponsor Olympic Games in Paris
- Gain high fashion traction through designer collabs
- Strengthen consumer bonds through performance-base rewards
- Link popular topics like gender equality to sports to take a stand
- Nike and Martine Rose team up to bridge the gender gap in soccer
- Appeal to older consumers by using older models as athletic role models



- Boost sales through partnerships with esports brands and teams
  - Graph 32: esports watchers who bought a certain brand's product because of the partnership between a professional video game player/team and a brand, by gender, 2022
- Strellson cooperates with Ovation
- Connect to younger esports-interested consumers via special releases
- Future-proof businesses by meeting the next generation of consumers in virtual spaces
- Meet your consumers in the virtual world like Nikeland
- 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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