Consumer Insights Report 02/2021

by ISPO Collaborators Club
Quarterly brand ranking, insights survey, trend forecasting and current mindset assessment based on the consumer community of the ISPO Collaborators Club.

ISPO Consumer Insights Report

Background

The Consumer Insights Report regularly records the current mindset and trends on an international basis, as well as brands that are in pioneering positions here or are on the way to becoming one.

Objective

With the Consumer Insights Report, the members of the ISPO Collaborators Club regularly provide information about the perception of brands and trends in order to review their strategy, to directly incorporate customer feedback from opinion leaders, and to better classify their own and other brands' positioning.

What makes this report so valuable?

As the international community consists of sports enthusiasts with a high level of diversity and opinion leadership, the surveys can, for example, identify trends that will also become important for the broader sport and outdoor fan community in the future. In addition, ISPO experts curate and interpret the results based on the additional open responses given and classify them for you in a brief, compact, and comprehensive way.

BLACKROLL is exclusive partner of the current Consumer Insights Report

As one of the founding members of the ISPO Collaborators Club, BLACKROLL uses the insights and the opportunity as a panel partner to contribute additional individual questions, which are not published.

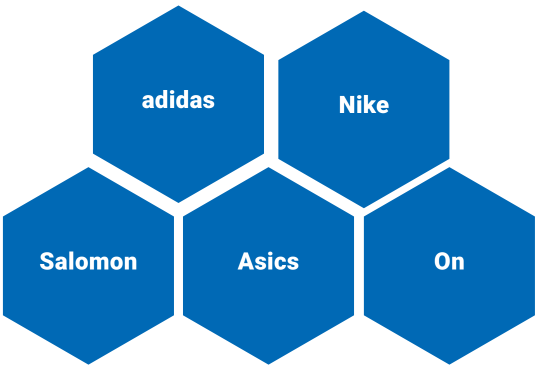
The basic membership as ISPO Business-Member is non-binding, free of charge and qualifies to become an exclusive panel partner f or a quarterly report.

We will gladly advise you: rapp@ispo.com
Christoph Rapp,
Product Owner ISPO Collaborators Club

Summary

Edition: **01 | Quarter 2/2021**
Participants: **599**
Focus countries: **DE, AT, CH, IT** (inclusion of further countries planned)
Most represented age group: **31–40 years**
Second most represented age group: **20–30 years**
Gender distribution: **37% female**
63% male
0% diverse or not specified

Top brands per key megatrend in the past three months:

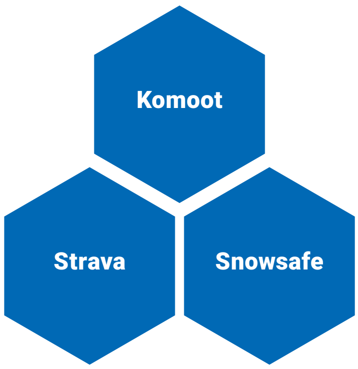


Top brands per key megatrend in the past three months:

Q2 / 2021	Sustainability	Digital & Connectivity	Healthstyle
Top brand	**Patagonia**	**Garmin**	**BLACKROLL**
Emerging newcomer	**Picture Organic Clothing**	**Hammer-head**	**Garmin**

Trend sport of the past three months:

Three most popular sports apps (smartphone, smartwatch) in the past three months:



Top 5 sports brands in the past three months:

The top 5 sports brands of quarter 2/2021 are adidas, Nike, Salomon, Asics and On.

The ISPO Brandnew winner from 2010 now with Roger Federer on the team is shaking up the market. The recently launched sneaker subscription model may have helped, neatly alongside Roger Federer's celebrity status.

The chase groups:
Patagonia and VauDe are on par. This may be due to the D/A/CH-heavy focus of the survey. Nevertheless, VauDe has caught up mightily.

The direct chase group are almost all on the same level and are called Salewa, Puma, Ortovox, Dynafit, VauDe and Patagonia.

Slightly behind comes the third group with K2, The North Face, Mammut, Brooks, Odlo, Garmin, Blackroll, Gore Wear and LaSportiva.

Not individual brands win the race, outdoor wins the race.

A slight surprise: We expected the so-called "big five" (Nike, adidas, Puma, Skechers, Under Armour) would come out on top, as they do in almost every survey. But the Coronavirus effect is clearly visible in our opinion and outdoor has received an even stronger tailwind during the pandemic than it already did before.

The big brands occupy this sector only partially authentically and especially medium-sized brands, which continue to inspire the new target groups with not too "overwhelming" offers and an easy and fun entry, now have the chance to sustainably assert themselves against the big five. The outdoor pie has become bigger.

High Potentials & Newcomer per Lifestyle

Sports can't be divided into product categories if you focus on the consumer.
The Consumer Insights Report identifies the newcomers and high potentials within these environments every three months.

Urban Culture
The importance of sports for the urban lifestyle is increasing. Sports, music, art, fashion, urban mobility–everything flows into one another.

Connected Athletics
Whether solo or as part of an energizing online community, indoors or outdoors, sports increasingly have a digital component.

Performance, Body & Mind
Mindfulness in relation to body, mind and athletic performance continues to be a growing segment. Competition and self-reflection, nutrition, exercise and quality of life are viewed holistically.

Team Sports & Spirit
Organized team sports continue to be a strong sector, but there are also more and more informal groups in which like-minded people come together. Sport as a group experience.

Nature Escapes
Out into nature, as far away from the daily routine as possible–this is becoming increasingly important for a growing number of people.

Adrenaline & Adventure
Exhausting your strengths and abilities, daring to try something new–that's what Adrenaline & Adventure is all about. A very special type of person is enthusiastic about this.

Emerging relevance of brands per lifestyle.

Newcomers and high potentials are identified according to the "evoked-set principle". In this case, the respondents were explicitly asked about relevant brands of which they had not yet been a buyer in the last three months.

High Potentials in **Urban Culture:**

Nike still ahead of adidas and almost on par with the rising star On and competitor Puma.

However, the segment is being stirred up by Patagonia, Vans and The North Face and one can already see the increasing importance in this lifestyle of VauDe, Maloja, Veja and Picture Organic Clothing, which shine either through attitude embodied in products and/or clear collections and connection to chosen themes.

High Potentials in **Connected Athletics:**

It is easy to see that this segment has long since become a cross-industry segment. Strongly growing, but also highly competitive. Here you can find more established sporting goods manufacturers, consumer electronics brands and pure software and app operators; giants such as Apple and Samsung meet newcomers such as Vaha and Peloton.

The top three are Polar, Garmin, and Suunto, which are likely to be driven primarily by the strong "quantified-self" idea (tracking oneself continuously as part of the health and fitness boom) as well as the outdoor boom (need for navigation for running, biking, hiking, etc., and tracking).

High Potentials in **Teamsport & Spirit:**

The position of well-known soccer club outfitters can be seen quite clearly here, with adidas asserting itself clearly ahead of Nike and Puma in first place. Another very interesting phenomenon can only be seen at second glance: in line with the lifestyle category "Team Sport & Spirit", brands are also ranked highly that are absolutely not known from classic team and club sports but are represented by a strong community behind them.

Many running brands stand out here, but also "digitally rooted communities" such as Freeletics, which are already clearly present in the "Connected Athletics" segment–it will be interesting to see whether Peloton can develop the community idea over time in the same way as pioneering Freeletics has already done.

High Potentials in **Adrenaline & Adventure:**

Interestingly, the big action sports brands of the past are no longer the leaders here, which is probably due to a complete redefinition and change in perception of the "action sports" genre. The fusion with outdoor is abundantly clear, and clear winners here are Salewa, Mammut and Patagonia. Both Salewa and Mammut have modernized significantly in recent years, and this may well have contributed to their top positioning.

Of the "big five", only Nike and adidas are worth mentioning here. With adidas Terrex, adidas has scored very strongly in industry circles–but since some of the collections have a strong "urban outdoor" influence, it can be assumed that consumers have already taken this into account in the 'urban culture' lifestyle mentioned above. ION plays with the "surfing elements" of water and bike and is the most visible of the brands that probably still come closest to the former classic action sports brands. This is probably mainly due to its strong establishment in the booming mountain bike segment.

High Potentials in Nature Escapes:

It is interesting to see how the position of brands such as Patagonia and VauDe have changed compared to Adrenaline & Adventure. Since awareness and appreciation of nature are at the forefront of this mindset, it is obvious that Patagonia and VauDe score here with their strong positions in their respective brands and as pioneers for sustainability and fairness.

It should be emphasized once again that this is a matter of high relevance and not of current buyers–consequently, VauDe can look forward to a high potential and is thus probably one of the few brands that manage to retain their existing brand fans as well as to increasingly inspire new target groups through their consistently applied attitude.

High Potentials in Performance, Body & Mind:

The top 3 brands, Powerbar, BLACKROLL and Nike have very different backgrounds but still have one thing in common. It would be hard to imagine a gym without any of the brands and this says a lot about the holistic approach to fitness, health and nutrition.

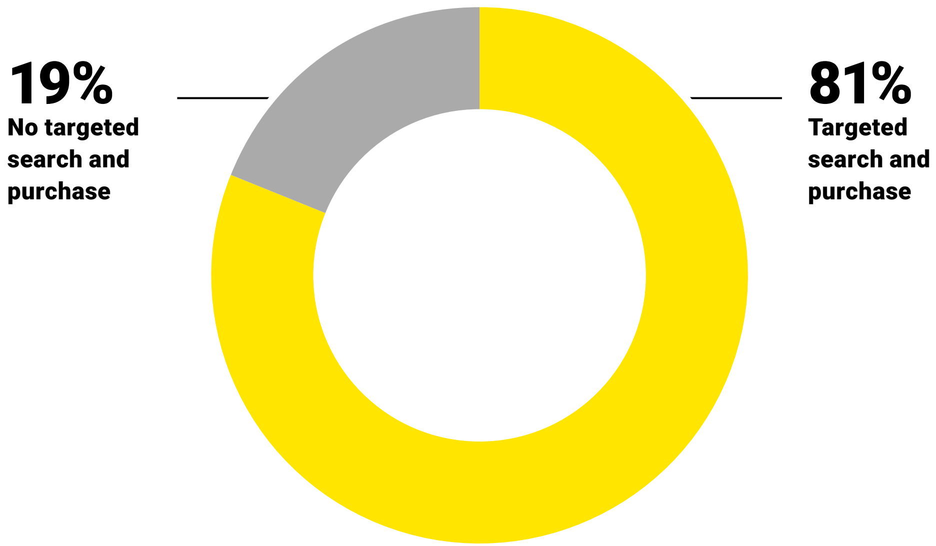
With brands like Headspace, 7mind and Calm in this set, it's also clear how much mental and physical health belong together. Garmin (as a clearly present brand) and Suunto (as a somewhat less present brand) are also interesting in this segment–which is probably due (see Connected Athletics) to the strong monitoring needs of health-conscious users.

Brand preference

Many brand experts believe that there is a general decline in brand loyalty among consumers. However, this probably has no influence on the fact that, at least in the sports, outdoor and lifestyle sectors, the targeted search for a brand is very prevalent.

It can be deduced from this that there is less and less of one brand for everything, but rather different brands perform for each lifestyle and segment–trend awareness for each lifestyle. Especially established and very large brands, which are at home in many areas, could be negatively affected by this gradual process.

Very specific search and conscious selection of a brand when buying sports articles (in the past three months).

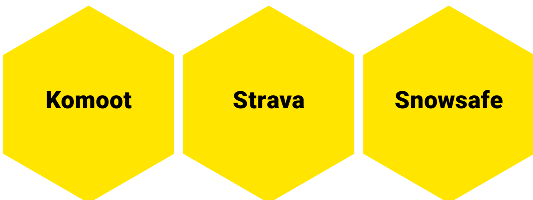


Sports Behavior & Trends

There is, the one big winner. Ski touring is by far the winner among the trend sports of the last quarter–it's easy to see that it's a winner of the Coronavirus pandemic. It is closely followed by yoga.
At a slight distance, the bike boom in various variations becomes clear. But climbing, running and hiking are also high on the list.

But trail running and stand-up paddling (SUP) are also currently still seen as trend sports. Currently, the Covid-19 effect can be clearly identified here. Beginner sports or individual outdoor sports are very popular. The course of this chart will be one of the most exciting for upcoming Consumer Insights Reports.

The charts in the app stores also have a few Coronavirus winners. Zwift, Gymondo and Peloton are on the bright side of the download rankings. The main winners are Komoot and Strava but weather and safety apps (which clearly reflect the outdoor and bike boom) are also represented. Mental health has also become much more important–as evidenced by the visibility of 7mind and the like.



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Please note:
The Consumer Insights Report is used to identify trends and sentiment and is not statistically modelled. Due to the high level of involvement, the panel participants also do not reflect the actual representative buyer landscape but come from a peak segment of consumers.

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