



# **Consumer Insights Report 03/2021**

**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.

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

**Contact us for more advice: [rapp@ispo.com](mailto:rapp@ispo.com)**

Christoph Rapp,  
Product Owner ISPO Collaborators Club



# Summary

Edition:  
 Participants:  
 Focus countries:  
 Most represented age group:  
 Second most represented age group:  
 Gender distribution:

**02 | Quarter 3/2021**  
**328**  
**DE, AT, IT, CH** (inclusion of further countries planned)  
**31-40 years**  
**20-30 years**  
**38% female**  
**62% male**  
**0% diverse or not specified**

## Top 5 sports brands in the past three months:



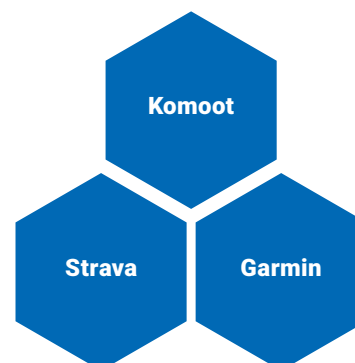
## Top brands per key megatrend in the past three months:

Q3 / 2021	Sustainability	Digital & Connectivity	Healthstyle
Top brand	<b>Patagonia</b>	<b>Garmin</b>	<b>Garmin</b>
Emerging newcomer	<b>Pyua</b>	<b>Coros</b>	<b>Peloton</b>

## Trend sport of the past three months:



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



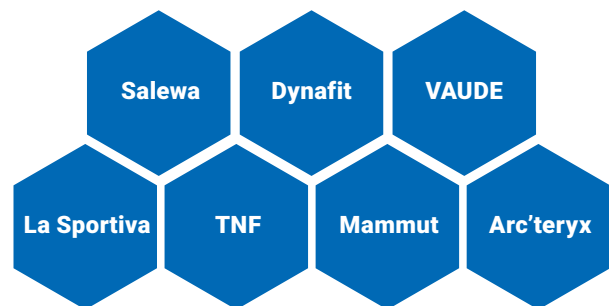
## Top 5 sports brands in the past three months:

**The top 5 sports brands for the quarter 3/2021 are adidas, Nike, Ortovox, Patagonia and Salomon.**

### The chase groups:

In chase group one, there are minor changes in positions. The only significant change is Arc'teryx, which has worked its way up in the chase groups.

The third chase group consists of some high-turnover international heavyweights, among others. These include, for example, Puma, Under Armour and Asics. The addition of Schöffel and Norrøna is also new here.





**Outdoor continues to have a tailwind and the market seems to be changing significantly and above all very quickly.**

The trend continues. Outdoor is still on the rise, and smaller mid-sized brands have overtaken some higher-revenue market players in terms of importance. That was quick.

Current industry discussions confirm this trend, with Puma ("only" in third place) now also wanting to devote much more attention to this growing market segment. According to ISPO experts, the efforts in the direction of sustainability and the associated certification are showing the first signs of success, which confirms the increasing importance of Patagonia, VAUDE, Schöffel and others.



# High Potentials & Newcomer per Lifestyle

Sports cannot be divided into product categories if you focus on the consumer.

**The Consumer Insights Report identifies the newcomers and high potentials within these lifestyles every three months.**



## 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:

adidas remains at the top in close company with Nike.

Patagonia and The North Face remain close to the top two. Interestingly, VAUDE and Salomon have positioned themselves ahead of Under Armour and Vans. The overall development is further proof that Urban Outdoor is growing.





### High Potentials in Connected Athletics:

Garmin still clearly represented and established in almost every sport with its current product portfolio. Suunto hot on its heels with a slight gap.

Apple as a consumer electronics giant, but still a newcomer in sports, is positioned between Suunto and Polar and thus established in the segment as a so-called "non-endemic" brand in sports with high relevance. Samsung is also represented; all in all, this area in particular is very influenced by non-endemic brands from the consumer electronics segment.







### High Potentials in Teamsport & Spirit:

As already observed in the last Consumer Insights Report, the trend of strong communities outside of classic team sports continues. Under Armour is now represented more prominently, which may be evidence of its increasingly successful efforts to reach out to the running community.





### High Potentials in Adrenaline & Adventure:

The high potentials in Adrenaline & Adventure are incredibly outdoors-driven, adding a slight mountain-oriented touch to the current ranking.

The formerly well-known Action Sports brands are also missing here, but this may also be due to the surf-heavy image of many of these brands. Due to the pandemic, there were significantly fewer surf trips from the so-called "landlocked" regions of Europe and the severe travel restrictions in North America did the rest.





### High Potentials in Nature Escapes:

The outdoor trend is more than evident here, and Patagonia and VAUDE continue to retain their top positions, which is probably due to the high appreciation of nature in the "Nature Escapes" segment.

Schöffel is also once again positioned more strongly than before, which is probably also due to its efforts in the area of sustainability. In addition, the modernization of the Schöffel brand is becoming ever more apparent, and is now likely to be increasingly well received in the market.





### High Potentials in Performance, Body & Mind:

As in the last Consumer Insights Report, the top 3–Powerbar, BLACKROLL and Nike–dominate the field, which (as already mentioned in the last Insights Report) is also perfectly plausible considering the strong presence of these brands in fitness studios.

Peloton is now represented somewhat more strongly here, which could be seen as a sign of establishment for the still young brand and is probably also due to the introduction of the treadmill "Peloton Tread". The also still quite young fitness food brand foodspring has also become visible, taking up the "Health" megatrend in a very contemporary way and utilizing it for their benefit.





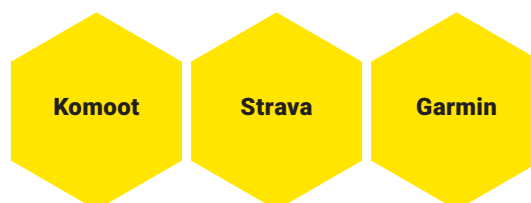
## Apps & Digital Communities

The charts in the app stores have changed significantly compared to the last quarter, which is probably due to seasonal factors. The clear winners are Komoot and Strava, mainly fueled by the bike, outdoor, and still ongoing running boom.



Apps and their communities have one characteristic in particular: the more they grow, the more relevant they become for users. It is very difficult to turn users into rivals or motivators for each other, and thus into a community—once successful, however, the growth curve is initially very steep.

### Top apps in quarter 3/2021





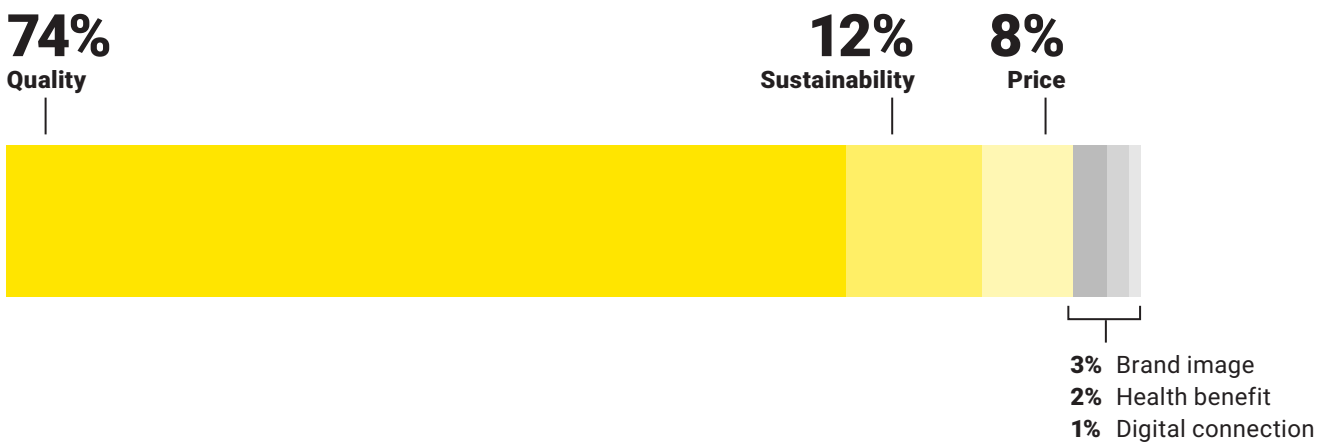
### Success drivers among consumers

Quality is by far the most important product and brand characteristic, not(!) followed by price, but by sustainability. It is well known that when buying, the average consumer usually decides on the basis of price.

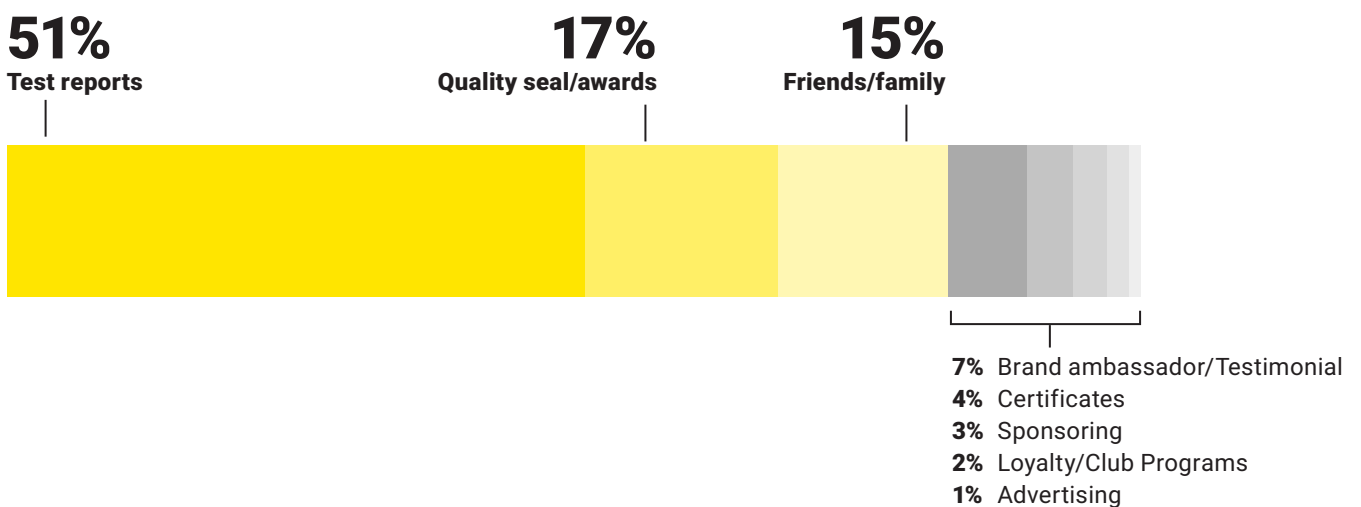
**Consequently, it can be said that the more enthusiastic a consumer is about sport and the higher their level of involvement is, the more sustainability becomes a purchasing factor ahead of price.**

It is therefore only a question of time before this circumstance becomes so important that this will also be the case for the average buyer.

#### The most important product/brand characteristics when making a purchase



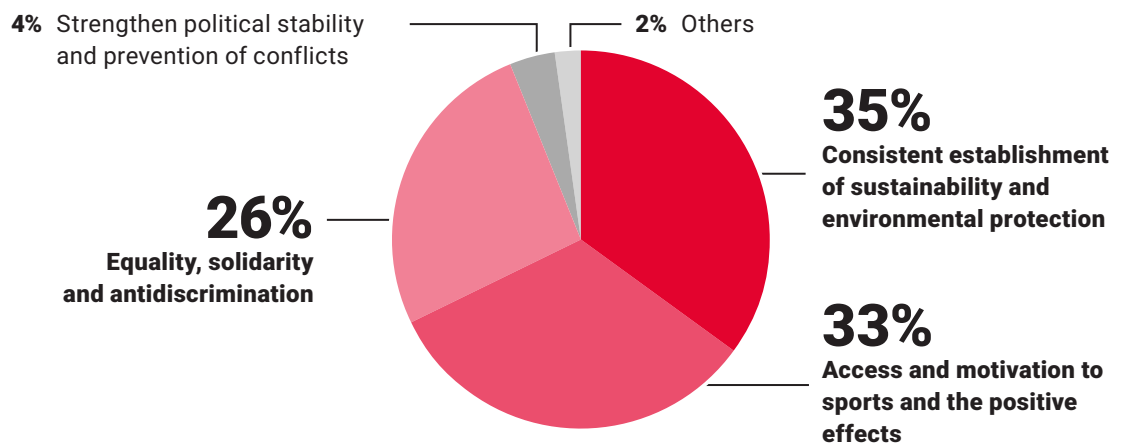
#### The biggest sources of inspiration are mainly test/experience reports as well as quality seals and awards



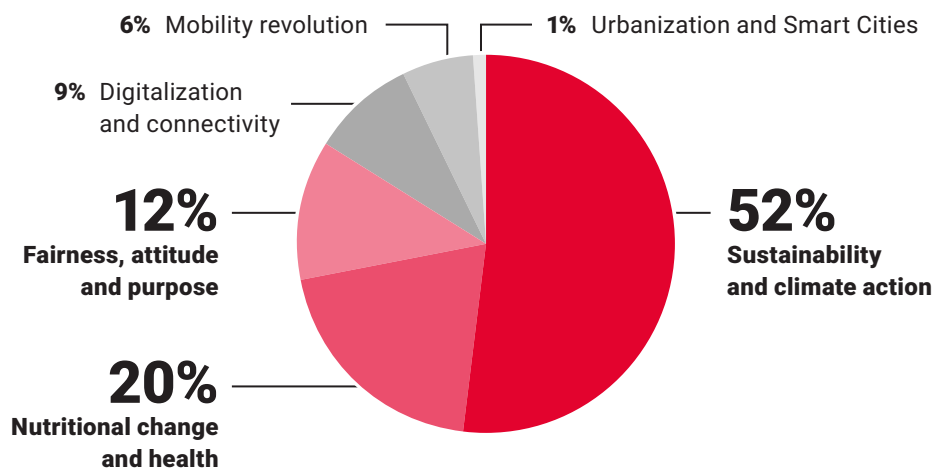
## Values in Sport

Sport is a driver, motivator and language of values and megatrends. This is particularly true in the areas of health and nutrition, society and the environment. This suggests that activations and projects in this area have a high relevance. At the same time, it also means that sports in particular are highly attractive for "non-endemic" brands from all industry sectors, especially nutrition (FMCG).

**Sports and outdoor have the opportunity to be a strong positive driver in the following global challenges**



**Trends considered as relevant for this**

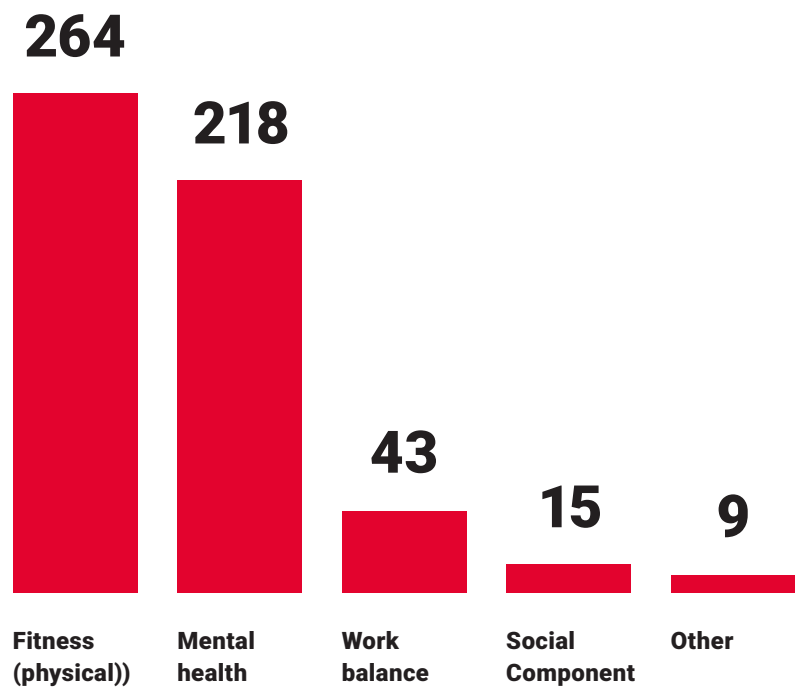




## Motivation and Benefits

Sport has long been equated with physical exercise. In recent years, it has become increasingly apparent that mental fitness will become a strong trend. In contrast to other industries, the sports business activates this driver comparatively little–this reveals an enormous potential to grow strongly, quickly and, above all, authentically.

**Motivation to do sports/be active**  
(multiple answers possible, n=328)







Messe München

Connecting Global Competence

# Imprint

## Consumer Insights Report

**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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