



Messe München

Connecting Global Competence

Consumer Insights Report 01/2022

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.

Polygiene is Partner of the Consumer Insights Report Q1/2022

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

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Product Owner ISPO Collaborators Club



Summary

Issue:

Participants:

Focus countries:

Most represented age group:

Gender distribution:

04 | Quarter 1/2022**207****DE, AT, CH, UK, IT** (inclusion of further countries planned)**31–40 years****35% female****65% male****0% diverse or not specified**

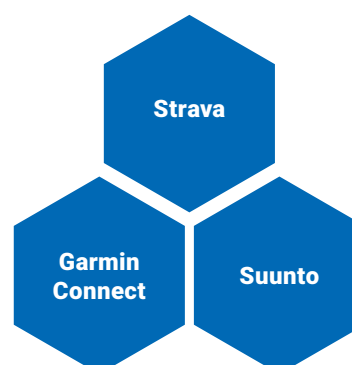
Top brands per key megatrend in the past three months:

Q1/2022	Sustainability	Digital & Connectivity	Healthstyle
Top brand	Patagonia	Garmin	adidas
Emerging newcomer	Pyua	Coros	Urban Sports Club

Top 5 sports brands in the past three months:



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



* both brands received the same number of votes

Top 5 sports brands in the past three months:

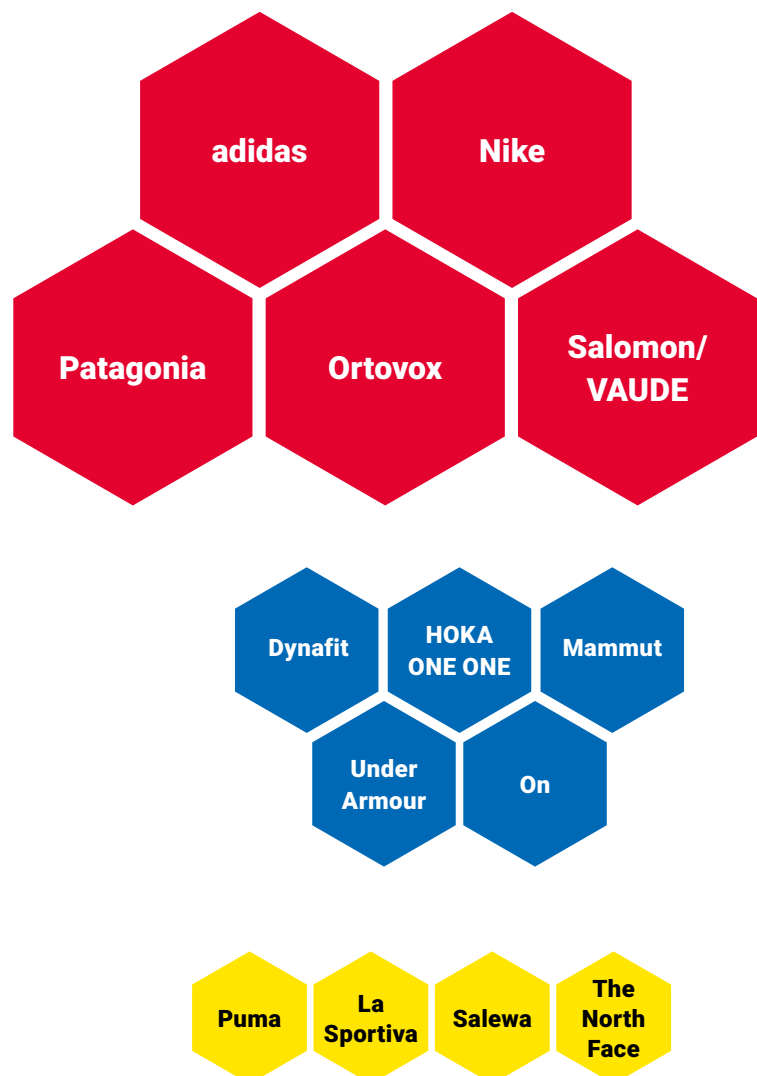
The top 5 or rather six as exception sports brands of the quarter 1/2022 are adidas, Nike, Patagonia, Ortovox and—a small peculiarity—VAUDE on a par with Salomon.

The chase groups:

New to the top rankings is HOKA ONE ONE in the direct chaser group behind the top 5, which also includes Dynafit and Mammüt. Like the other brands, On has also established itself in this direct chaser group.

The time has come: the running season is "on". And the Swiss brand of the same name should benefit from it, despite its increasing fashion/lifestyle orientation. The Swiss brand seems to be doing very well in other respects, too, looking at the most recent ISPO Awards for its innovations Zero Jacket and Cloudmonster. That the running season has finally started is confirmed by HOKA ONE ONE, which has come out of nowhere to join the top 5 chasers.

Running has become one of the most popular global sports at least since the lock-downs, and mountains have also gained in popularity in recent years, both in winter and in summer. These two influencing factors add up to the current picture of the top brands.

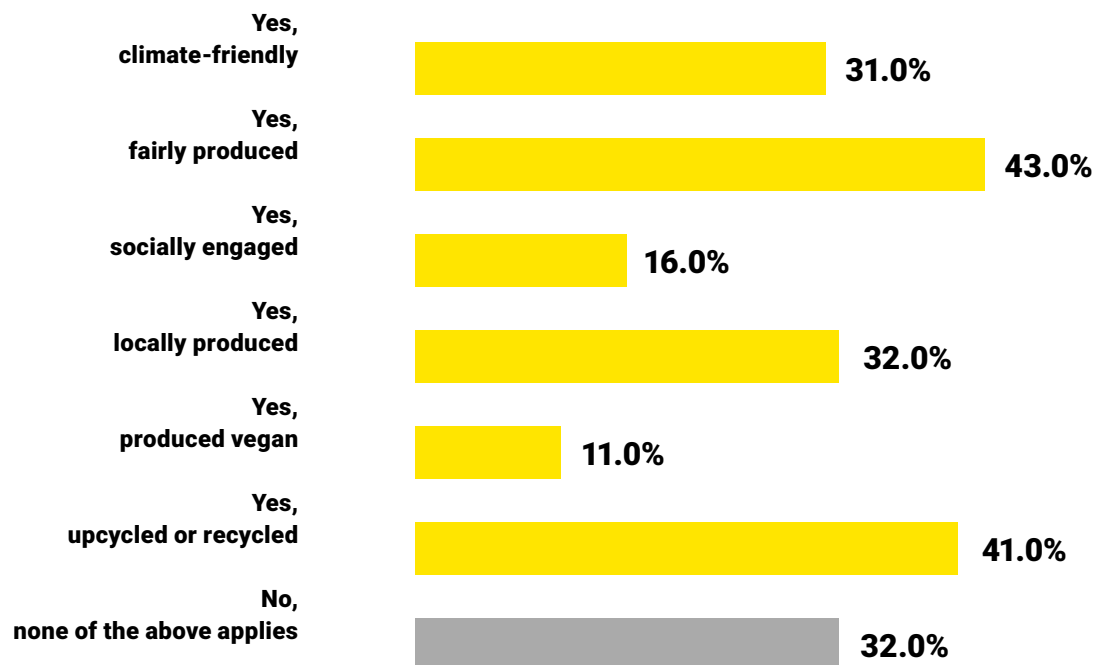




Fair, recycled, local and climate-friendly absolutely on the winning side.

Winning market share in a saturated market is enormously resource-intensive and not an easy task. But if you focus on fair, up-/recycled, local, and climate-friendly production, you have a good chance of persuading customers to switch.

In the last three months, have you switched or decided to switch to a certain brand and/or product for the following reasons?



Percentages,
multiple answers possible



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 continues to be the undisputed leader in urban culture and remains a respectable distance ahead of Nike. And this quarter, for the third time in a row, this has not changed.

Quietly, however, On has placed itself behind Patagonia and The North Face. Step by step, On's relevance in this lifestyle is growing. Just as quietly and constantly, Fjällräven secures more relevance here and pushes ahead of Puma for the first time with a very small lead. VAUDE also remains part of urban culture with slightly increased relevance.





High Potentials in Connected Athletics:

The size of the pack has decreased somewhat, and ISPO Collaborators Club members see even more potential in brands like Garmin, who have pulled well ahead of Suunto and adidas.

Suunto, adidas, Polar, and Apple form a kind of chasing pack and differ only slightly. Adidas still stands out somewhat in terms of its product portfolio.

We can assume that this is due to the company's commitment to eSports, but also to digital campaigns and activities such as "Virtual Running" and the strong focus on the "member-first" strategy, which has resulted in the "Confirmed" app, among other things. Here, members (in the renamed "adiClub" community) can access limited editions and the like before anyone else.

The learning from this is that you can definitely be a digital-focused brand and activate potential - for example, reaching young digital natives - without offering digital/connected products.





High Potentials in Teamsport & Spirit:

adidas is now seen as having even more potential than before. Even if the Winter Olympics were seen critically, the equipment of the German team here may have led to this slight improvement in team sports & spirit lifestyle.

It is obvious that well-known outfitters are represented, even if newcomers like RedBull can be found as well. Whether this is due to the strong fan community and the strong athletes, some of whom were also seen in China for the Winter Olympics, is difficult to judge, but would be an understandable reason.

The fact that Decathlon also appears in this field is as interesting as it is difficult to explain. However, since the retail chain attracts many beginners and less equipment-intensive sports are now becoming feasible thanks to the upcoming summer season, this may be a possible reason that something like a "beginner community" is very delicately emerging here.





High Potentials in Adrenaline & Adventure:

Patagonia is becoming the biggest high potential player in this lifestyle. Followed by modernized mountaineering brands such as Mammut.

The summer season is upon us and the mountains remain the number one adventure destination. Thus, brands with climbing and bouldering roots are now also appearing in the mix; Petzl and Black Diamond, for example, are seen as having high potential in this area. The "mountain outdoor brands" such as Dynafit, Ortovox and Salewa continue to have a tailwind and remain high potentials.

This speaks for the fact that on the one hand they remain true to their roots and yet reinvent themselves. This shows that the collection and the look and feel that they convey probably fit together here and prove the spirit of the times.





High Potentials in Nature Escapes:

Patagonia still the brand with the best future prospects. However, the gap to the other players is narrowing somewhat.

Even though adidas is not yet one of the big high potentials here, its relevance has grown, which is probably mainly due to the growth of the outdoor brand adidas TERREX. Schöffel and Salomon have also gained slightly in potential.





High Potentials in Performance, Body & Mind:

Much change in the performance, body & mind lifestyle. Powerbar is ahead of adidas with a small lead. Adidas' long-term competitor Nike, on the other hand, has also lost potential and is now behind adidas by a slightly larger margin.

Sandwiched in between is newcomer Athletic Greens, which not only enjoys a high opinion among the community of the ISPO Collaborators Club, but is also making a name for itself in Europe with its well-targeted social media paid campaigns and its strong athletes.

However, fitness and wellbeing are also on the rise, driven by the relaxed Covid 19 rules and the upcoming summer. One of the probable reasons why Powerbar was able to take the lead.

An interesting phenomenon is that VAUDE is also once again to be found in this lifestyle. As already mentioned in the last quarter, it can be assumed that the mindful approach to nature is particularly appealing to consumers who generally pursue a very mindful lifestyle.





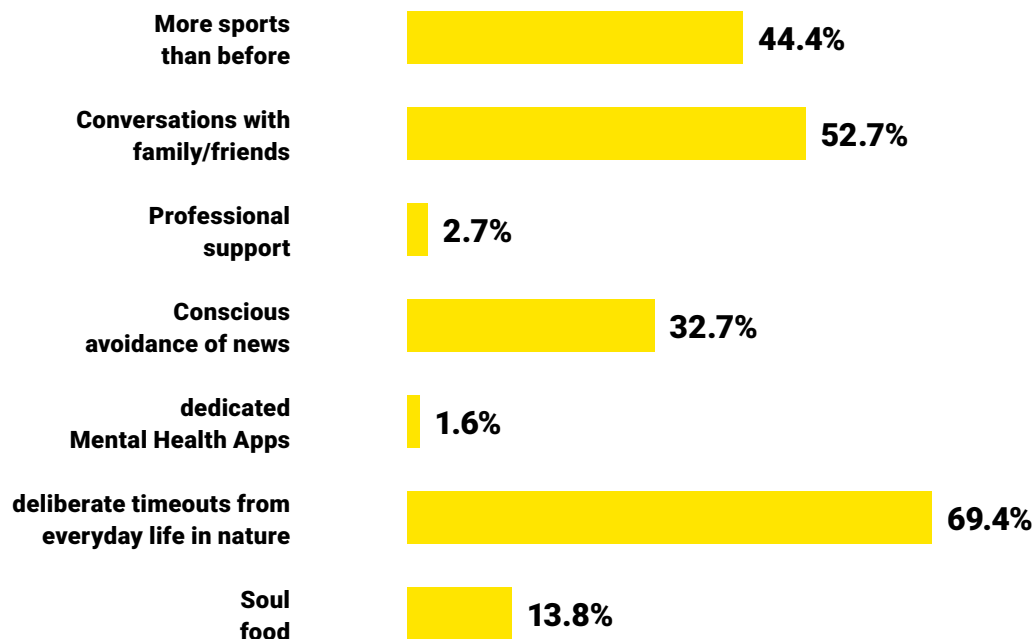
Resilience, stress and relief

In the context of the Performance, Body & Mind lifestyle, ISPO Collaborators Club members were asked how they deal with current challenges.

The past events marked by the pandemic, the current events of war as well as the fundamental challenges such as coping with climate change are taking their toll on people's mental well-being.

This once again shows the enormous potential of outdoor and sports. Access to nature is the most important relief factor for people, as time out in nature is the absolute preferred method of coping. Family and friends are the second most popular choice, followed by more frequent sporting activities in third place.

**The current situation is affecting many people.
How are you dealing with it?**

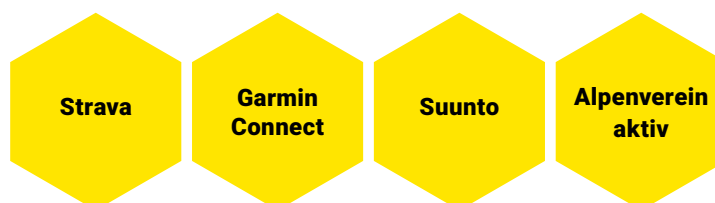


Percentages,
multiple answers possible



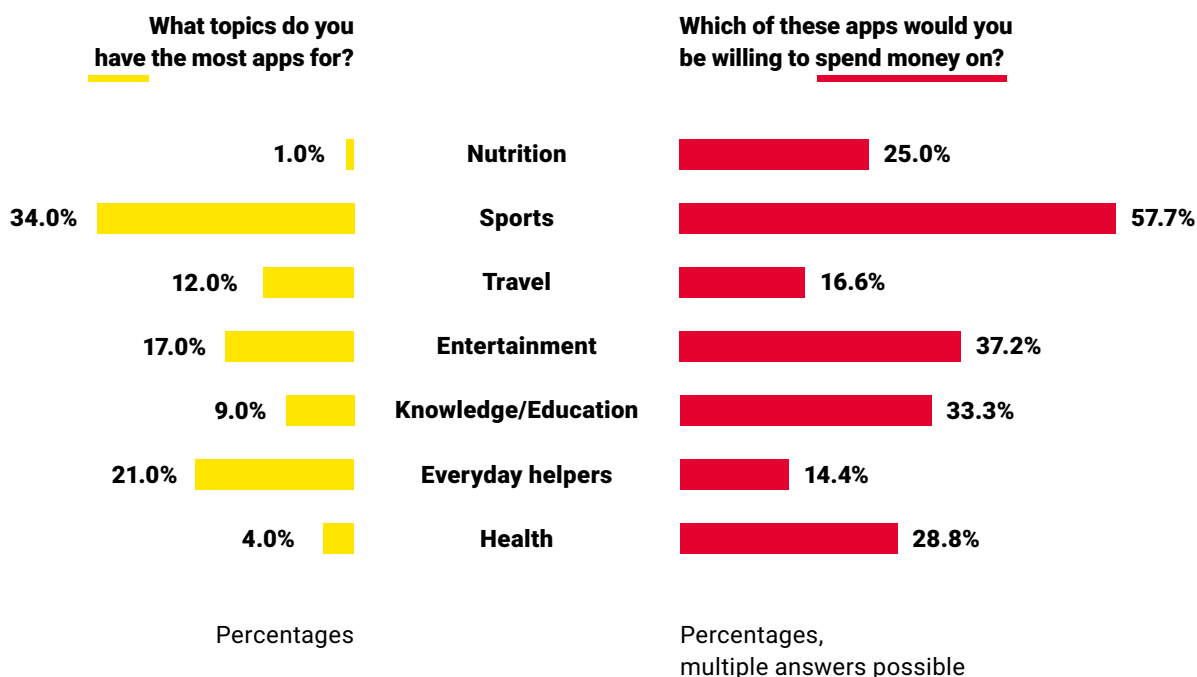
Apps & Digital Communities

Strava overtakes Garmin Connect by a very slight margin compared to the last quarter. A new addition is the "Alpenverein aktiv" app, which is ultimately outdooractive in the guise of the Alpine Club—the partnership seems to be a smart move, considering that outdooractive does not appear in this ranking with its own brand.



The sports app market is enormously promising.

Good news for anyone looking for digital revenue models in sports. The monetization potential for sports apps is very high. On the one hand, sports apps are very widespread and top the list, and on the other hand, the willingness to spend on sports apps is immense. Of course, it must be taken into account here that the ISPO Collaborators Club has a very sports-affine population—nevertheless, the significance and potential compared to competitors, such as those from the entertainment sector, can be classified very well.



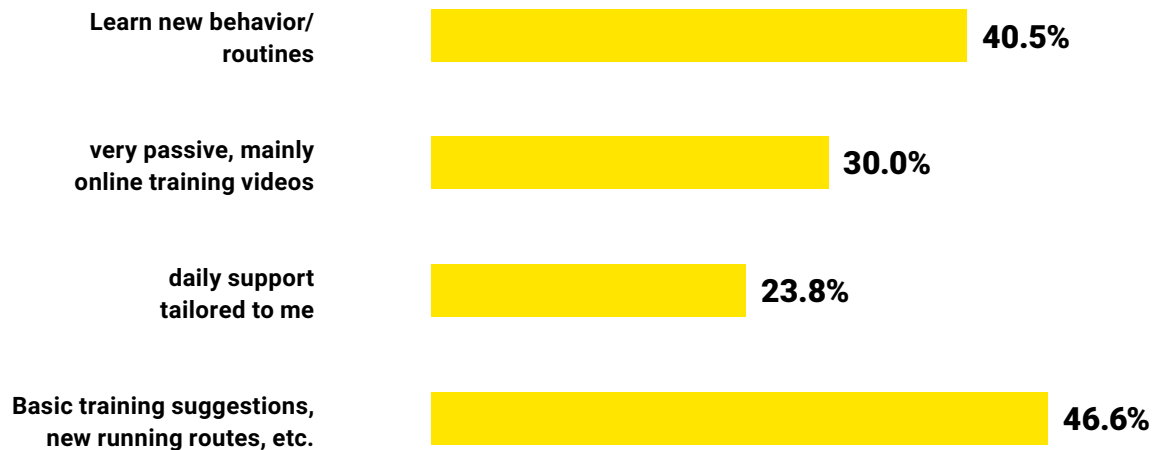


Digital assistants in sports.

Digital assistants are becoming increasingly important thanks to ever-improving AI and connectivity to platforms and marketplaces is on the rise. These have also long since arrived in sports. One of the best-known players in this segment is probably Freeletics.

In general, the willingness to use digital assistants in a wide variety of areas is very high. However, it is highest in the area of inspiration with concretely usable suggestions such as running routes. But the digital assistant may also accompany and guide the learning or integration of sporty/healthy routines into everyday life. Particularly for holistic approaches that combine fitness with nutrition, for example, or support the integration of mental and physical health into everyday life, the conditions are very good.

How do you already use digital assistants in sports or can you imagine using them?



Percentages,
multiple answers possible

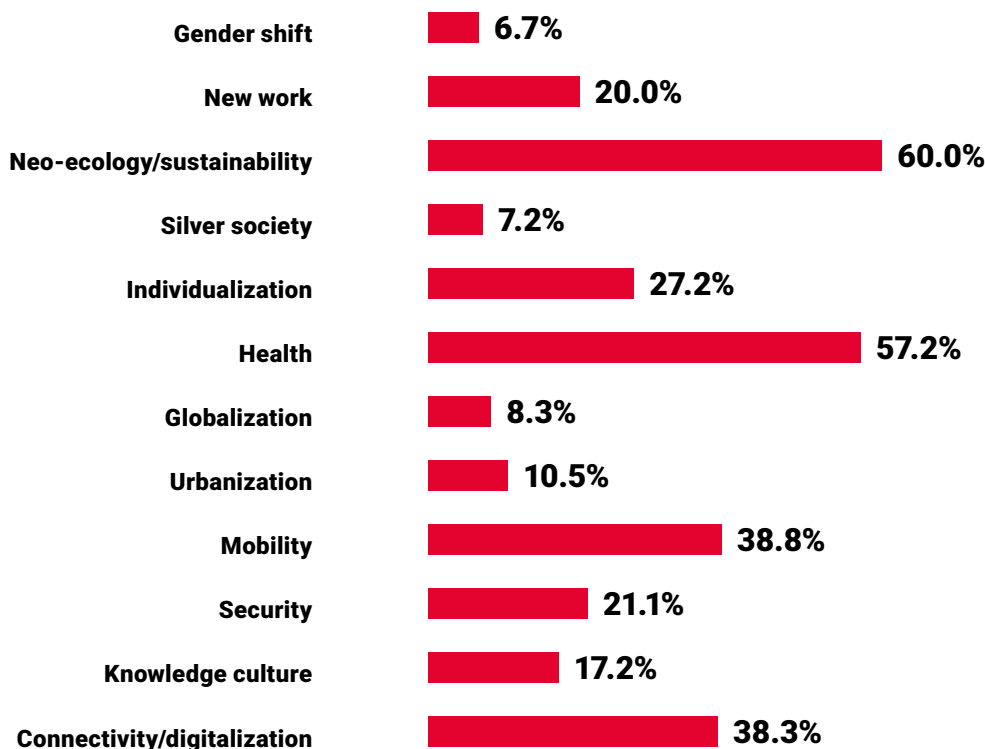


Megatrends drive the sports market

The megatrends of the future present the world with a lot of change. But from a sports perspective, there are very clear distinctions as to which will be the most relevant for consumers. Responsible business in terms of sustainability and fairness are almost as relevant as health. Closely followed by mobility and the digitalization trend.

Considering that the bicycle is driving the mobility revolution and that sports, nutrition and mental fitness are defining the concept of health, it is easy to understand that the sports market will grow in the future.

Which trends do you think will be relevant for you in the future?



Percentages,
multiple answers possible



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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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