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Consumer Insights Report 01/2023

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
Accelerating Sports

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.

elan is Partner of the Consumer Insights Report Q1/2023

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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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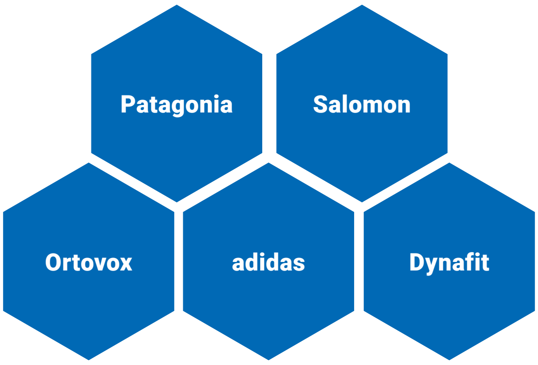
Summary

Issue:	**06 | Quarter 1/2023**
Participants:	**414**
Focus countries:	**DE, AT, CH, FR, IT** (inclusion of further countries planned)
Most represented age group:	**31–40 years of age**
Gender distribution:	**28% female** **72% male** **0% diverse or not specified**

Top-5 sports brands of the past three months:



Top brands per key megatrend in the past three months:

Q1/2023	Sustainability	Digital & Connectivity	Healthstyle
Top brand	**Patagonia**	**Garmin**	**Garmin**
Emerging newcomer	**Revolution Race, Picture Organic Clothing**	**Coros**	**Waterdrop**

Top 5 sports brands in the past three months:

The top 5 sports brands of quarter 1/2023 are Patagonia, Salomon, Ortovox, adidas and Dynafit.

The chase groups:
Patagonia has consistently topped the list of top brands since its high-profile announcement to turn itself into a kind of NGO for the planet.

After that, brands with a strong winter/mountain and running/trail running focus, among others, mix in. Head and Fischer make their way into the top rankings for the first time. The seasonal aspect of a weak winter or a late and long-awaited onset of winter during the survey period certainly plays a role here.

Nike and On have both slipped into the second chasing group and are on par with Arc'teryx, who appear in the top rankings for the first time. Considering that On is still a fairly young brand, the rapid rise and consistent establishment among the top brands continues to be highly impressive.

High dynamic among the most popular brands.

Amer Sports represented with two brands in the top rankings. A lot of movement and new entrants among the most popular brands.

Throughout the survey, it became evident that Salomon and Arc'teryx are the flagship brands of the Amer Sports Group and prove that both have have consistently developed into lovebrands. Arc'teryx was already on the verge of reaching the top rankings during previous issues.

It is also interesting that for the first time hardgoods-heavy brands such as Head and Fischer appear in the top rankings, although these certainly suffer from the extremely weak winter. However, due to the recent snowfall in Central Europe at the end of February they made their way into the minds of winter sports fans–likely accompanied by great relief and joy.

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.

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 pushes slightly ahead of Patagonia once again. Patagonia continues to establish itself with a young and often urban target group, which can be assigned to the so-called "Consciousness Millennials", and is therefore also more of a statement than a "piece of clothing".

Good news also for the VF Corp, for which Vans and The North Face promise to attract high purchasing intentions aamong urban lifestyle enthusiasts. On also remains allocated here.

However, Maloja, whose brand awareness is likely to have risen consistently, is a recent addition. It can be assumed that Maloja's brand DNA makes it particularly popular with city dwellers with easy access to nature.

High Potentials in **Connected Athletics:**

Garmin remains the undisputed top dog and continues to rise in favor among potential buyers. Strava consistently moves up in many small steps and certainly benefits from the constant expansion of its app, which covers more and more sports and functions.

Following close behind is Apple, a consumer electronics giant–from a sports perspective, a so-called non-endemic brand, i.e. not not part of the sports sector. That is interesting as Samsung–another non-endemic brand has lost potential significantly.

In the midst of the field, adidas and Nike continue to be well represented. Both are strengthening their digital offerings and platforms, which is seen by the end consumer.

High Potentials in **Teamsport & Spirit:**

Strava is fairly new to this lifestyle as a high-potential brand, providing strong evidence that digitally layered communities work really well.

Otherwise, adidas has further expanded its top position and managed to pull away somewhat from its pursuer Nike–both continue to be highly dominant in this lifestyle. Hummel is somewhat catching up withPuma, likely benefiting from the Handball World Cup in January. Dynafit is also capitalizing on the community effect among performanceoriented mountain athletes and is expanding the potential.

The appearance of Red Bull is interesting and could be linked to their high level of sponsorship in team sports–especially in German soccer.

High Potentials in **Adrenaline & Adventure:**

Things are getting interesting in the action-oriented lifestyle: Patagonia is taking the lead. This may not only be due to the latest stroke of genius by founder Yvon Chouinard, but also to the so-called "Alternative Outdoor" movement, which is based on the former genre of action sports: Nature awareness, mindfulness paired with experience and adrenaline.

Mountaineering-oriented brands, which of course promise a lot of adventure, are also strongly represented. Trail running is also a driver here.

Norrøna **SALEWA** Nike
Adidas SALOMON RED BULL
BLACK DIAMOND **ORTOVOX**
PATAGONIA
THE NORTH FACE **DYNAFIT** VAUDE
Scarpa
Arc‘teryx **MAMMUT** PETZL
LA SPORTIVA Edelrid
Ouicksilver

High Potentials in **Nature Escapes:**

VAUDE is catching up slightly with Patagonia and with Salewa they are the top three in this segment. Ortovox and Mammut have not declined significantly in purchasing intentions, while Dynafit remains stable in the upper range. Jack Wolfskin is now slightly higher on the list.

What is striking about the Nature Escapes lifestyle is the high diversity of brands that are mentioned. This means that this lifestyle is demanded by a highly heterogeneous group of buyers. This offers many opportunities to shift market shares, but also makes an attractive and clear positioning highly difficult–unless you define yourself through purpose and attitude, as Patagonia does, for example.

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

"Blackroll is back" and takes the lead, closely followed and in good company by adidas, lululemon and Nike. The brand obviously manages to position itself highly successfully with new products around the topic of regeneration, well-being and health and hits a nerve.

Powerbar has also moved very strongly to the front, which are well on track with their updated product range. The same trend is obviously activated by Athletic Greens for themselves as well–the New Zealanders are visible for the first time in this lifestyle. The distribution of the field clearly shows that physical and mental fitness, health and nutrition are considered holistically and even outdoor brands play a relevant role.

Behavior, Values & Trends

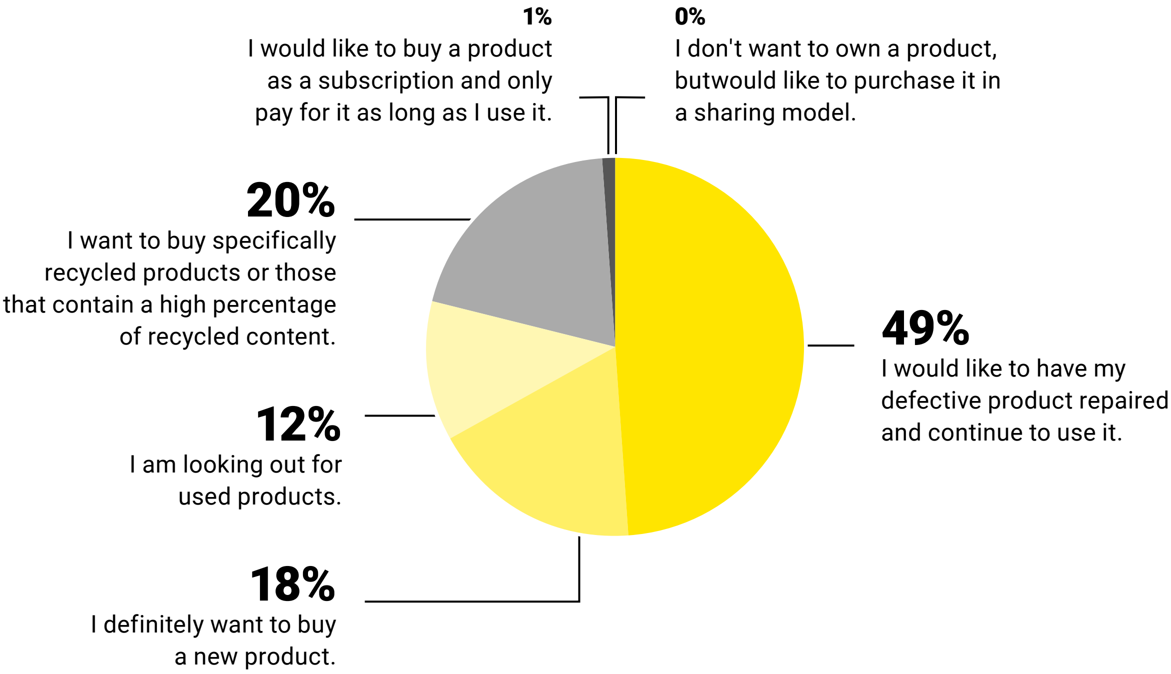
Current prevailing purchasing behavior

The ultimate proof of a changing mindset can be seen impressively in these results. Almost precisely half of the respondents would rather have a product repaired before considering other options.

This is the unconditional imperative for all sporting goods manufacturers to urgently look into repair services and make them part of their range of services. A lifetime repair guarantee as part of the product is well received, as can be seen, for example, in the industry neighbor Fashion (example Nudie Jeans) for years.

The chart also shows that recycled or refurbished products are preferred for new purchases. Second-hand products also represent a solid potential, while subscription models are hardly in the focus of consumers yet.

What best describes your current buying behavior?



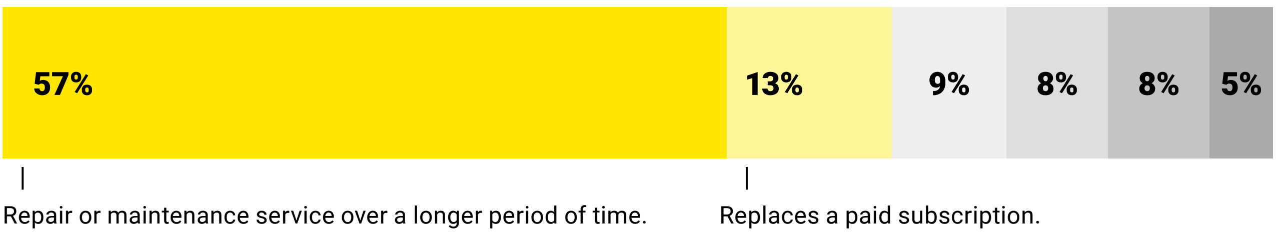
n=414

Access to the ecosystem instead of simple product purchase.

The message is clear: It has to be more than just the product! Brands are less and less just product suppliers, but are increasingly becoming companions to the consumer–whether as coaches, service providers, or by granting special advantages. This is expected, as can be seen here.

Access to a repair and maintenance infrastructure, subscription to an otherwise paid service, or access to unique experiences are the biggest levers to pull the customer into the own ecosystem and to be allowed to be their lifelong companion–actually the ultimate goal for any brand.

An increasing number of products are linked to additional benefits and services.
What criteria should these have for you? n=414



9% Varying benefits and advantages of different kinds.
8% Unique experiences (travel, meet & greet, etc.).
8% Access to certain facilities (wellness, training, etc.).
5% Access to a moderated community that regularly follows the relevant activity.

For more than half of the respondents, relevant additional services are an important purchasing argument! Those who do their homework now and meet these opportunities with a good strategy can win the race in the next few years–because new rules of the game for brands and market shares are being drawn up here.

Would you consider buying a particular brand based on additional services that are relevant to you?
Scale from 1=highly unlikely to 5=highly likely. n=414

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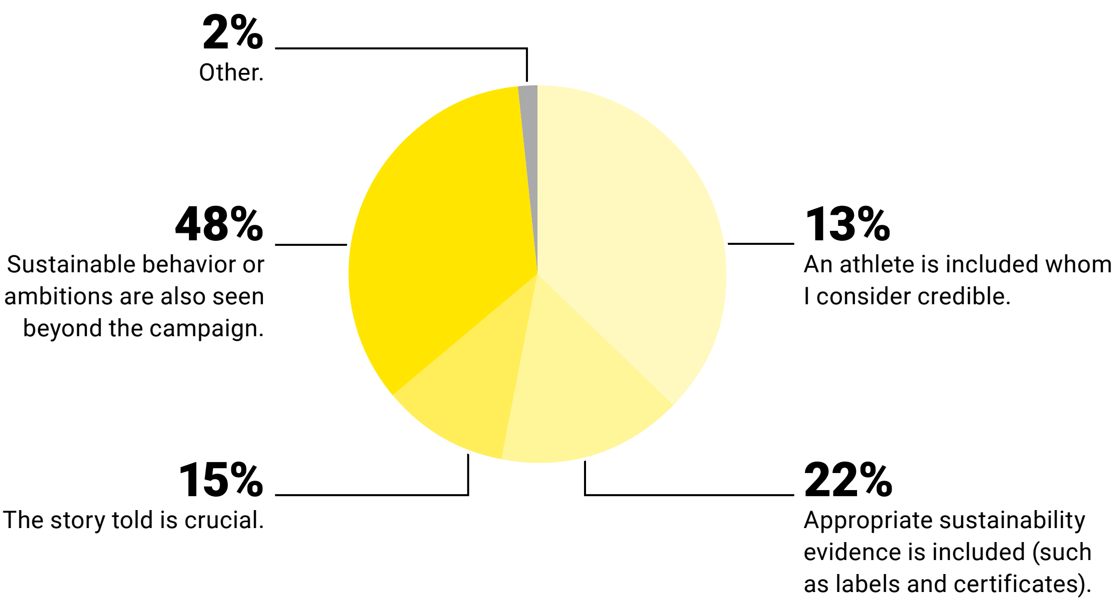
Attitude meets demand for transparency.

„What you do simply proves what you believe in.“ is one of the mantras of Simon Sinek–the US marketing guru par excellence. And that's exactly what seems to be absolutely true in the sports world.

Credibility is also a major issue for brands that are emotionally close to consumers in times of fake news and the question of actual truth–as is the case in the sports, outdoor and lifestyle sectors.

However, the answer is as simple as it is clear. The so-called "enlightened consumer" is no longer a word from marketing seminars and reference books. Rather, the consumer wants a practiced attitude. Consumers look closely at transparency in corporate governance and credible evidence such as labels and certificates. Therein lies a great opportunity.

What does an ad/marketing campaign need to accomplish for you to find it credible?



Multiple answers possible, weighted percentages, n=414

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Vacation, tourism and sports

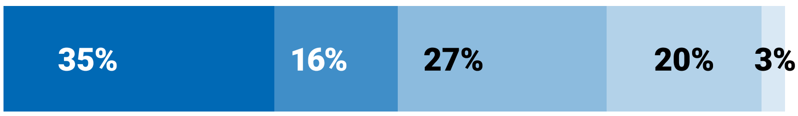
The closer link between tourism and sports brands is worthwhile.

Vacations are once again in high demand, and active vacations are an indispensable part of this. They are not only of great importance for tourism and destinations, but are also becoming increasingly important for sports brands and are therefore an exciting instrument for them. It is clear that not only sports vacations are in high demand, but they are also a highly relevant and opportunity for new purchases.

Those who manage to forge targeted combination packages and linked offers around the vacation or purchase occasion can benefit.

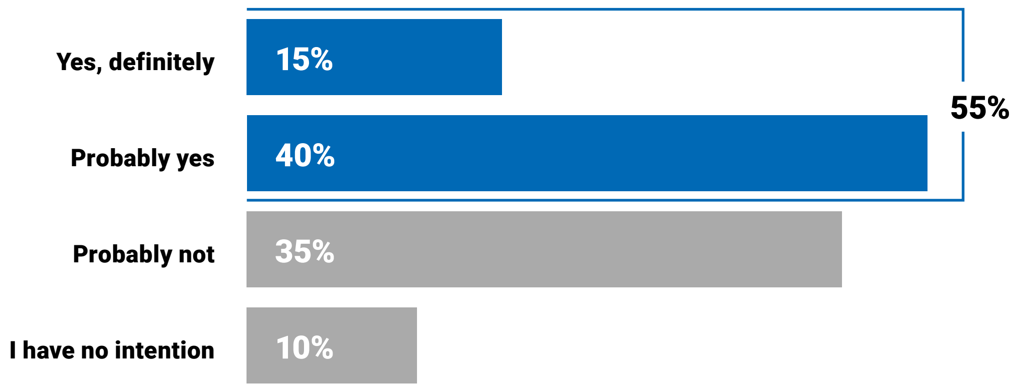
This opens up completely new horizons when it comes to sports brands, tourism destinations and corresponding providers cooperating more closely with one another - also with regard to the "ecosystem thinking" mentioned above.

How many of your vacations do you plan with a specific sport focus? Scale from 1=all of them to 5=none of them.



conditional question, 401 answers

Are you planning to buy new sports equipment for at least one of these vacations?



conditional question, 388 answers

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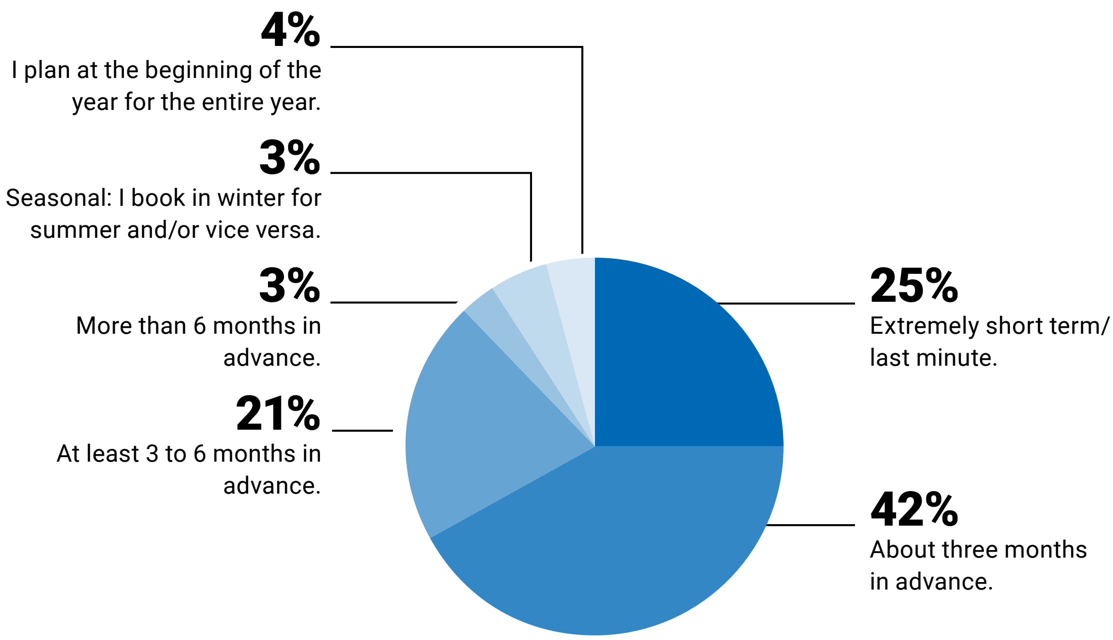
Vacation planning influences new purchases.

When it comes to new purchases and vacations, it's also about the right timing. When does the consumer plan and when is the right moment to place an attractive combination package or overall offer?

As a general rule, it can be deduced that if a vacation is planned at short notice ("last minute" up to three months in advance), ideally the whole package will be offered: Sport, accommodation and equipment as well as coach, so that the purchase can be included in a "Seamless User Journey".

The role models here are airlines and large vacation portals, which are highly proficient at displaying insurance policies, rental cars and additional offers at the right moment.

When/how do you plan your sports vacations? n=414



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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