MESSE MÜNCHEN

Consumer Insights Report 04/2023

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.

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.

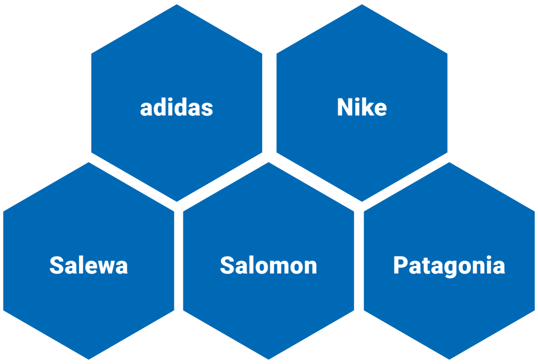
Contact us for more advice: rapp@ispo.com
Christoph Rapp,
Product Owner ISPO Collaborators Club

MESSE MÜNCHEN

Summary

Issue:	**08 | Quarter 4/2023**
Participants:	**92**
Focus countries:	**DE, AT, CH, IT**
Most represented age group:	**31–40 years of age**
Gender distribution:	**30% female** **70% 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:

Q4/2023	Sustainability	Digital & Connectivity	Healthstyle
Top brand	**Patagonia**	**Garmin**	**adidas**
Emerging newcomer	**Picture Organic Clothing**	**Coros**	**runamics**

MESSE MÜNCHEN

Top 5 sports brands in the past three months:

The top 5 sports brands of quarter 4/2023 are adidas, Nike, Salewa, Salomon and Patagonia.

adidas

Nike

Salewa

Salomon

Patagonia

The chase groups

Ortovox

Puma

VAUDE

Dynafit

Mammut

ON

Arc'teryx

La Sportiva

Peak Performance

Outdoor labels are becoming the universal brand for every occasion.

adidas and Nike are once again leading the field of top brands. However, this has not always been the case in the past.

Chasers such as ON and Patagonia have repeatedly challenged the two megabrands for the top position. Patagonia is still very steady in the top 5, ON has slipped slightly but is still in a very good position.

Looking at the top rankings over the past quarters, the current situation provides a very good final picture that shows how well-established outdoor brands have become. The top ranking of adidas is probably mainly due to the high acceptance of TERREX.

Brands such as Salewa, Salomon, Mammut and Ortovox have consistently (with only slight fluctuations) developed into the most popular brands in the community; this is probably mainly due to the fact that the brands claim urban outdoor for themselves and the collections are now structured in a way that they meet fashion and functional requirements and thus also create an image with which many active people generally identify.

Conversely, it is therefore only logical that fashion brands are developing increasingly sports-oriented collections and also launching functional textiles.

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:**

adidas and Nike are almost on a par in this ranking, which means that Nike has caught up slightly.

Patagonia has also established itself further. VF can be pleased and is not only represented by The North Face, but also by Vans; Vans in particular has managed to overtake The North Face by a barely visible margin. Nevertheless, Vans has positioned itself very well here, especially in the second half of 2022 and in 2023.

High Potentials in Connected Athletics:

Wahoo was the biggest winner and can look forward to significantly higher purchasing intentions, having made huge leaps among the high potentials.

Samsung, on the other hand, has completely disappeared from the field, while Apple has improved slightly. Otherwise, Garmin remains the undisputed leader and can continue to look forward to good purchasing intentions.

High Potentials in Teamsport & Spirit:

adidas remains at the top in terms of purchasing intentions for the next three months. Nike is also very well positioned, but adidas is significantly more popular with buyers. It is striking that the two brands dominate the field almost completely on their own.

The gap between them and the next high potentials Puma, asics and the other brands is very significant. However, it has been shown that purchase intentions are heavily dependent on the upcoming major events in the respective sports. The big learning here is that being a sponsor and outfitter pays off–even for less dominant sports such as soccer.

High Potentials in **Adrenaline & Adventure:**

The topic of "alternative outdoor" has already been considered several times in this lifestyle segment and the mix of outdoor brands with brands from the former so-called action sports sector speaks volumes: brands from surfing, biking and mountaineering are closely associated with outdoor brands–including Patagonia and VAUDE, as clear representatives of sustainability and environmental awareness.

High Potentials in **Nature Escapes:**

The time has come for what has been apparent throughout 2023: VAUDE and Patagonia are on a par in this lifestyle segment for the first time, i.e. VAUDE has once again caught up a little.

Fjällräven has positioned itself better in terms of purchasing intentions. In this outdoor-oriented lifestyle, it is very apparent how diverse the brand landscape is compared to other lifestyle segments. Many small and medium-sized brands share the market.

High Potentials in
Performance, Body & Mind:

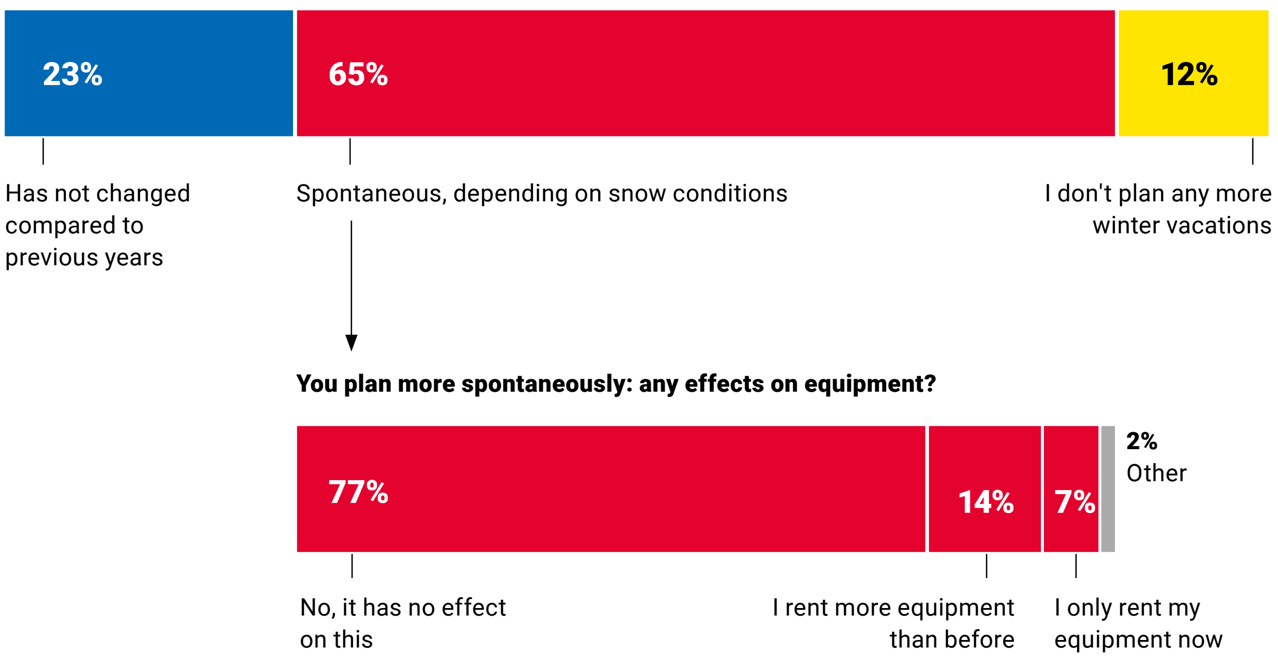
The holistic understanding of health is also reflected in the high potentials: nutrition, regeneration and fitness are all represented with the corresponding brands. Lululemon, which is at the top of consumers' purchase intentions, can be particularly pleased. But Powerbar can also be happy and is continuing its success story.

Behavior, values & trends: Winter sports becomes on-demand business

When it comes to winter sports, there is good news and bad news. The bad news is that the traditional and firmly established winter vacation will soon be a thing of the past. The good news is that they are still very popular–but are planned spontaneously.

Many consequences can be derived from this. The rental market is likely to continue to be a major beneficiary. The Consumer Insights Report from Q2/2023 already showed that consumers now want to rent more than just the familiar classic ski/snowboard, bike or surfboard. Tourism destinations that can also offer alternatives in poor snow conditions will be able to plan their sales and capacities better. A good example of this is the Austrian region of Ötztal with Area 47, which now offers an indoor bike park.

How do you plan your winter sports vacation?



ISPO Accelerating Sports

Behavior, values & trends: Major events in Europe

UEFA EURO 2024 and Paris 2024 Olympics met with acceptance.

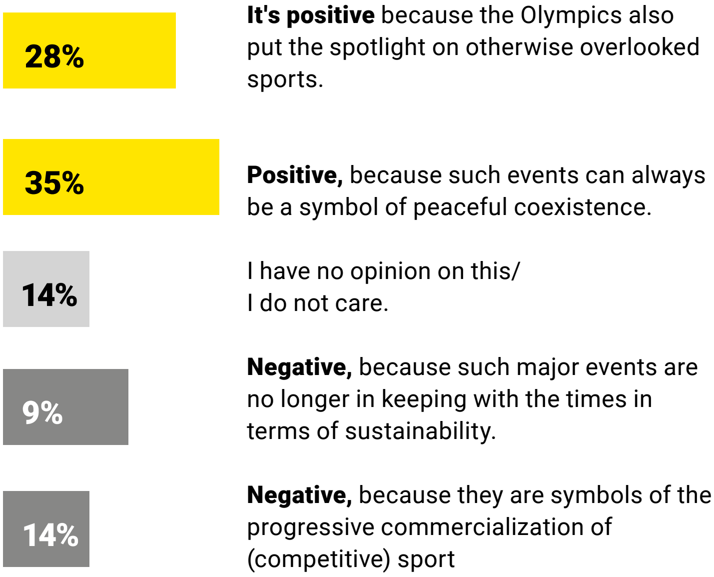
Of course, it is clear that sports enthusiasts, such as those represented in the ISPO Collaborators Club, tend to react more positively to major sporting events than the general population. Nevertheless, the example of the World Cup in Qatar and the strong criticism of the Winter Games in China have shown that there is also a lot of resistance among sports fans. In this respect, the sports year 2024, with the two mega events of the Summer Olympics and the European Championships, bodes very well. There are two reasons for this, one very rational and one very emotional:

#1 The infrastructure is already in place and there are no critical construction projects being rushed through by autocratic governments.

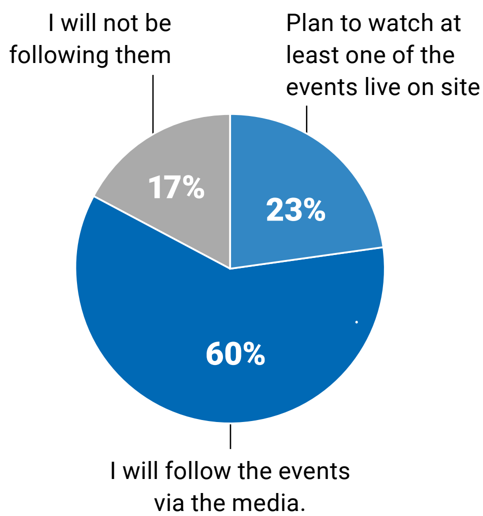
#2 In times of conflict and war, the "Olympic idea" of peaceful confrontation through sport becomes much more relevant and important.

Above all, it is clear that niche sports, which usually only earn a lot of attention through the Olympics, as well as brands and outfitters in the Teamsports & Spirit sector can benefit from this and exploit the high level of acceptance of these major events for themselves–this does not always have to happen through official sponsorships but can also happen through creative campaigns for the events. Brands whose athletes take part in these events can look forward to the following results in particular.

How do you feel about two major sporting events taking place in Europe in 2024?



How will you follow the major events I just mentioned?



Behavior, values & trends: Credibility of brands

Athletes and social commitment are success drivers for credibility, but it's the mix that makes the difference.

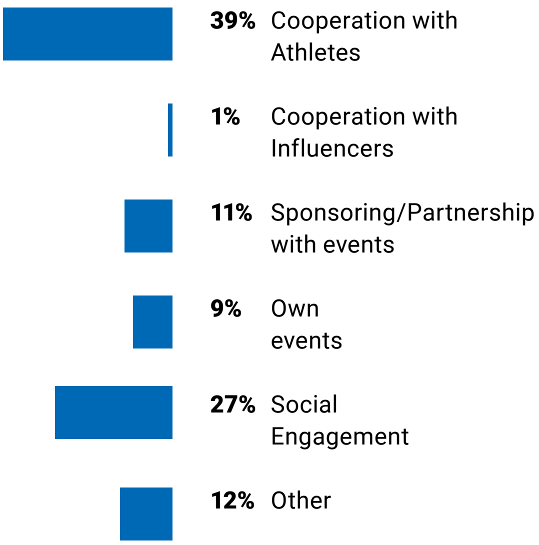
The big questions for brand strategists and sponsorship managers always revolve around the issue of successful brand positioning, the prerequisite for which is a high level of credibility. This is where it becomes particularly clear that the recipe for success is still cooperation with athletes and social commitment.

What is surprising, however, is that collaboration with influencers has almost no direct influence on the credibility of the brand–at least not with a very select and sports-savvy target group. However, anyone who has already mentally removed influencers from their marketing and sponsorship mix must be careful. Influencers can still be an important part of a brand's communication strategy, because what they can do more than almost any other tool is reach in a relevant target group. At the same time, influencers can also do things that athletes cannot. For example, they can directly support sales and promotions, support product launches in terms of reach and the like.

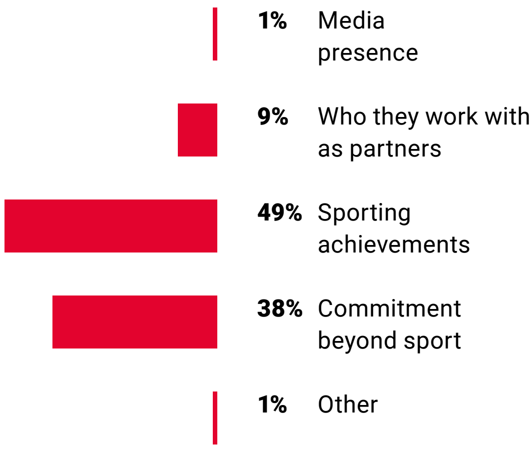
In summary, influencers are more important for product communication than for brand communication–and this in turn is important information for building a go-to-market plan.

Sponsorship and events are also important, although it must also be clear here that these mostly serve to give the athletes and other communication ideas a stage. So it's the mix that makes the difference.

What makes a brand credible for you?



What makes an athlete credible for you?



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.

Published by:
Messe München GmbH
ISPO Group
Messegelände
81823 München

Published on:
November 28, 2023

Team:
Christina Rabl, Technical setup and evaluation
Christoph Rapp, Product Owner ISPO Collaborators Club
Claudia Siebenweiber, Design
Valentin Ramser, Translation
Christoph Beaufils, Author & Analysis

ISPO Collaborators Club
ispo.com/collaborators-club

ISPO
Accelerating Sports