Sports Retail Study 2022
Results from a European consumer survey

MARCH 2022

Deloitte.

MAKING AN IMPACT THAT MATTERS since 1845

Executive summary

The Sports Retail Study 2022 at a glance

55 % actives[1]
Overall, physical activity among actives decreased during the pandemic (65 % in 2019).

31 % running[1]
Running has been the most popular sports activity. Actives focused more on activities in non-organized settings 55 % (48 % in 2019).

37 % shop online[1]
The preference for online shopping among actives increased during the pandemic (33 % in 2019).

239 € average spent
Despite pandemic-related restrictions, actives still spend a significant amount on sporting goods (sports apparel + sports equipment).

64 % sustainable[1]
Sustainability is becoming increasingly important for actives (57 % in 2019).

In August and September 2021, 9,500 people from a total of 19 European countries were surveyed on behalf of Deloitte. The samples are representative in terms of age and gender for each individual country. The survey was conducted through an online questionnaire with 500 people per country.

The following countries were included in the survey:

DEU AUT CHE UK FRA ITA ESP PRT NLD BEL

DNK SWE NOR CZE FIN POL HUN ROU SVK

Notes: 1) Actives = do sports on a regular basis

Content

Survey design and sample

9,500 people from 19 European countries were surveyed in August and September 2021 regarding their sports activities and sporting goods consumption.

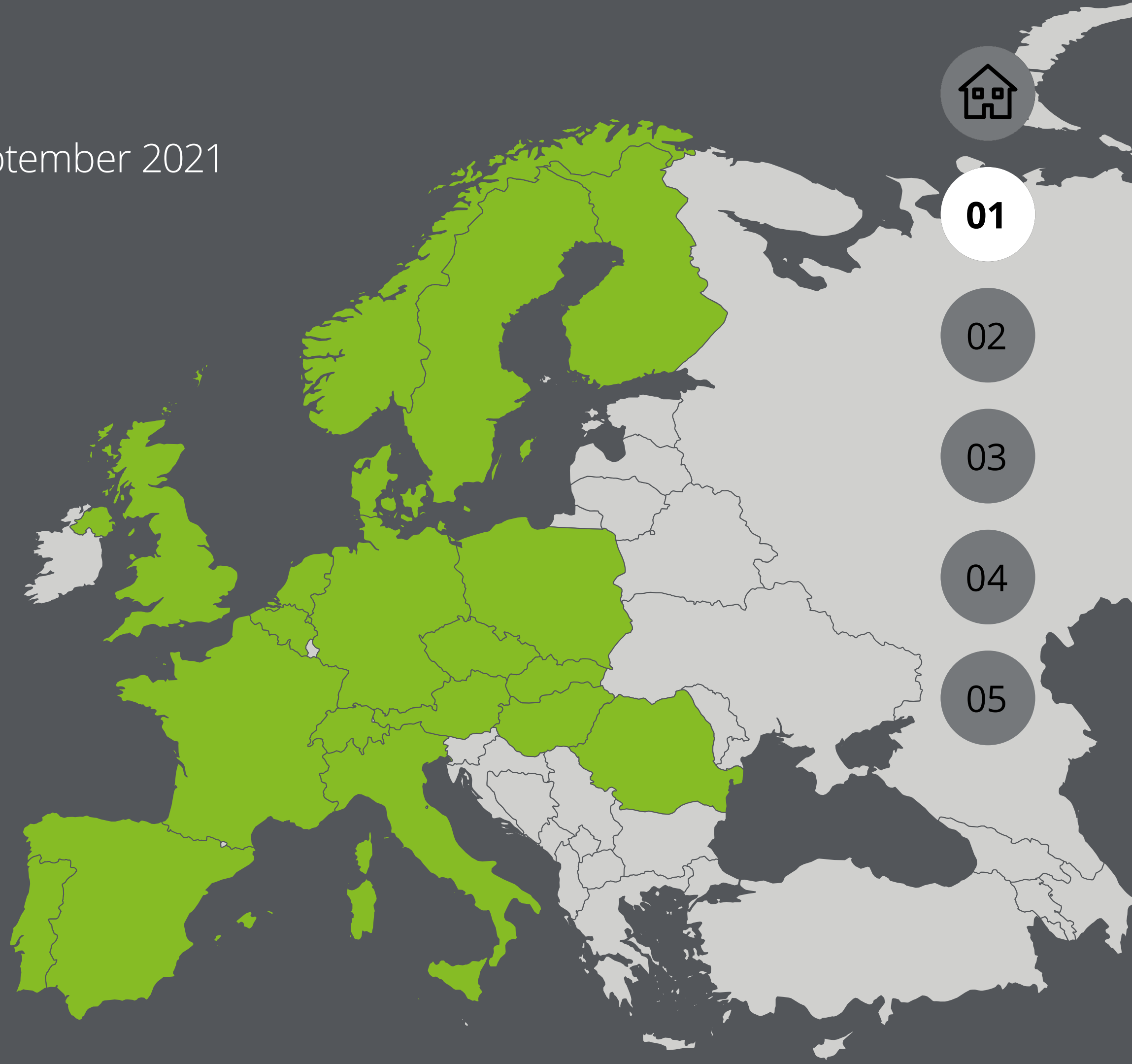
Survey methodology

A total of 9,500 people from a total of 19 European countries took part in a survey conducted on behalf of Deloitte in August and September 2021. The samples are representative in terms of age and gender for each individual country. The survey was conducted online with 500 people aged 16 and above.

In some cases, we compare the figures in this study with the results of the Sports Retail Study 2020, based on a survey conducted before the pandemic hit. The 2019 survey included participants from eight European countries (Germany, France, Poland, Romania, Czech Republic, Hungary, Austria and Bulgaria) with a total sample size of 6,028. You can access the full Sports Retail Study 2020 here.

Fig. 1 – Countries included in the survey
n = 500 per country, aged 16 and above

Surveyed countries



In addition to the primary research, we have included a variety of information derived from publicly available and other direct sources. We did not do any additional verification in the preparation of this report, nor did we audit any of the financial information contained in these sources. Please note that amounts are typically rounded to the nearest whole number in this report, which may in some cases result in sums, shares or growth rates that cannot be recalculated due to the more precise (non-rounded) values used in the underlying calculation. To allow for international analysis and comparison, we have converted all financial figures into € where necessary, using the exchange rate from August 31, 2021. No adjustments were made for differences in local price levels.

Survey design and sample

The age and gender profile of the sample in each country is approximately in line with that of the underlying population based on the most recent census data. The sample also includes participants from all levels of education.

Fig. 2 – Gender
“Please indicate your gender.”;
n = 9,500

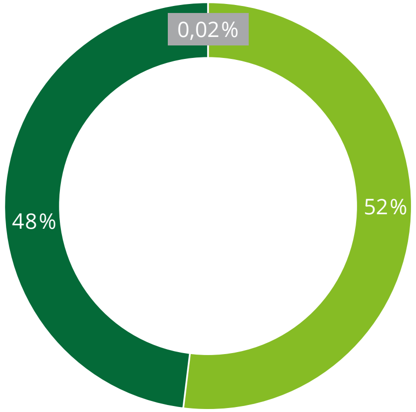


Fig. 3 – Age
“Please indicate your age.”;
n = 9,500

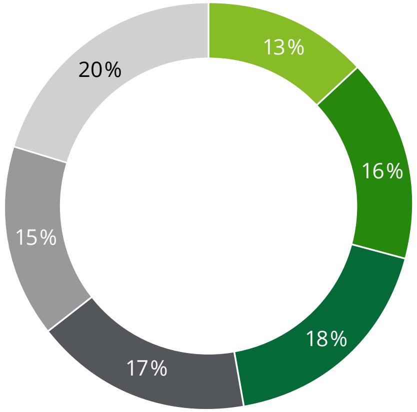
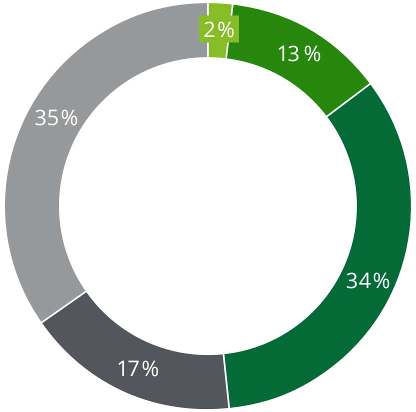


Fig. 4 – Level of education
“What is the highest level of education you attained?”;
n = 9,500



Sports behavior of actives

Compared to non-actives, actives are, on average, younger (58 % are between 16 and 44) and have a high educational level (54% have post secondary or tertiary education).

Fig. 5 – Gender distribution of actives (outer circle) vs. gender distribution of non-actives (inner circle)
“Please indicate your gender.”;
Actives: n = 5,190;
Non-actives: n = 4,310

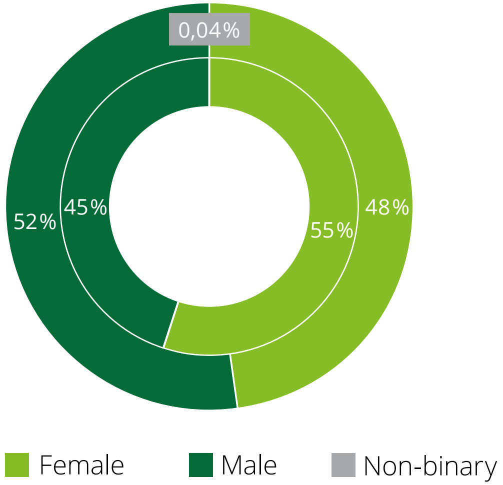


Fig. 6 – Age distribution of actives (outer circle) vs. age distribution of non-actives (inner circle)
“Please indicate your age.”;
Actives: n = 5,190;
Non-actives: n = 4,310

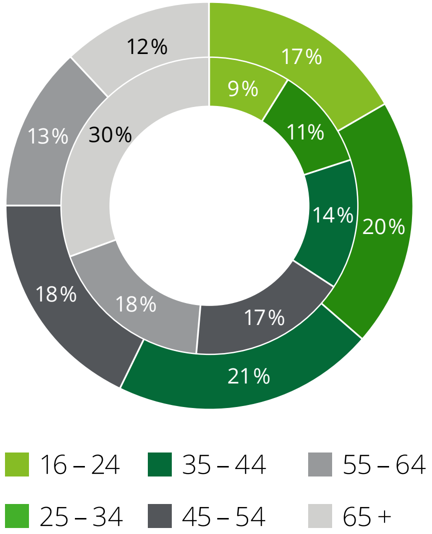
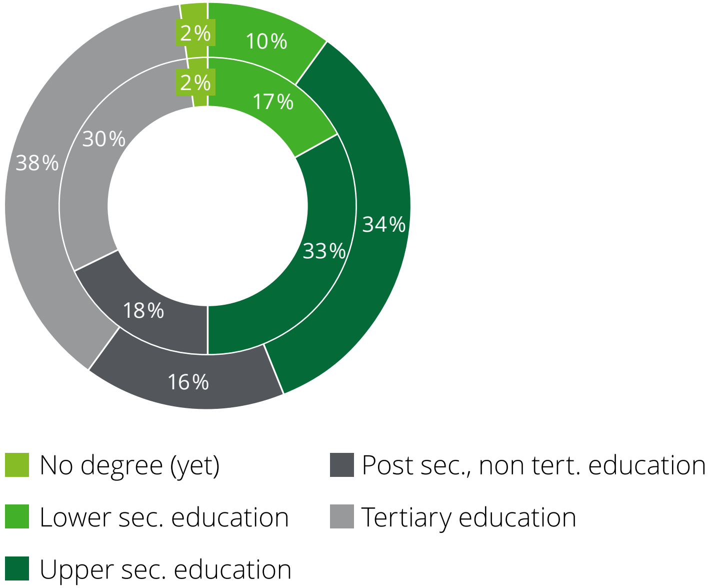


Fig. 7 – Educational level distribution of actives (outer circle) vs. educational level distribution of non-actives (inner circle)
“What is the highest level of education you attained?”;
Actives: n = 5,190;
Non-actives: n = 4,310



Sports behavior of actives

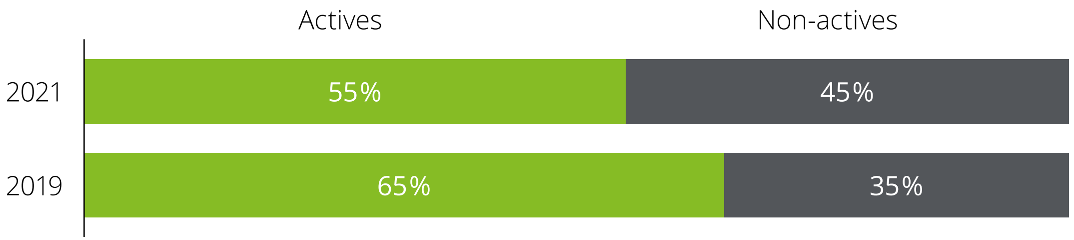
Fewer actives engaged in sports activities during the pandemic, down 10 percentage points between 2019 and 2021. Respondents say they expect their activities to return to previous levels following the pandemic.

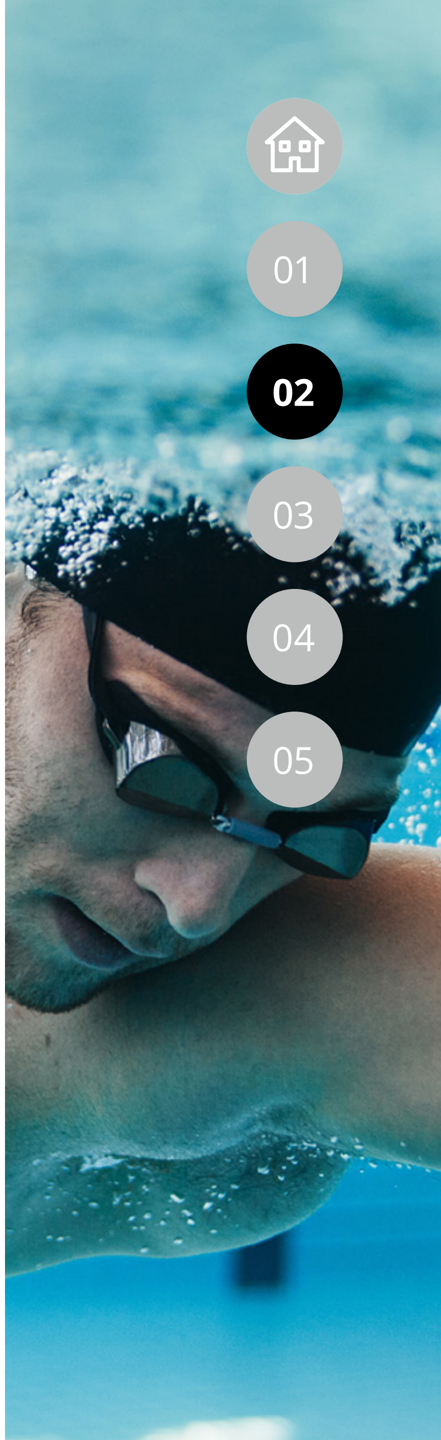
Less actives and most popular sports

Compared to the 2019 survey, the share of actives regularly participating in sports activities has decreased (-10 pp), due in part to pandemic-related restrictions on sports and leisure activities. The temporary closure of gyms and other sports facilities as well as restrictions regarding social interaction meant that sports enthusiasts had only limited options. Thanks to the high uptake of vaccinations and partial lifting of restrictions, people across most of Europe were able to return to a "new normal" during the summer of 2021. On average, respondents expect to return to their previous level of activity following the pandemic.

Fig. 8 – Share of actives in 2021 compared to 2019

"Do you do sports regularly?";
n = 9,500

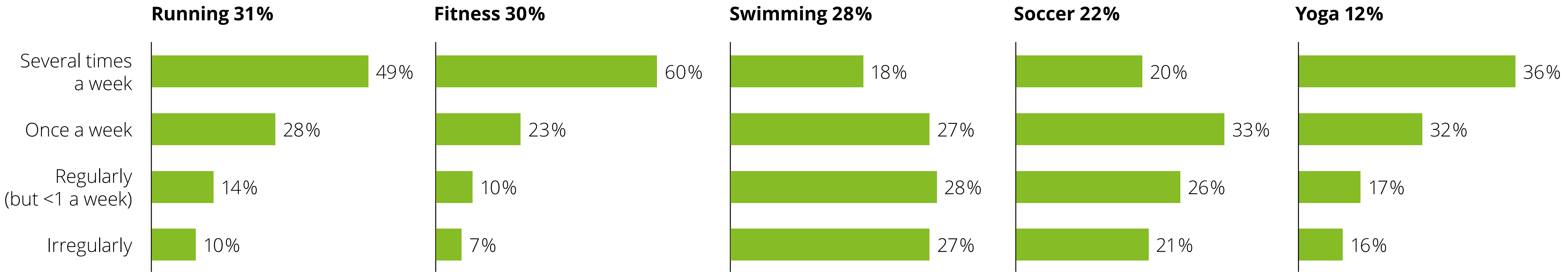




Sports behavior of actives

Running, fitness and swimming remain the most popular sports across Europe.

Fig. 9 – Most popular activities and frequency
"Which sports have you done within the past twelve months and in which frequency?"[1, 2];
n = 5,190



Notes: 1) Multiple answers possible; 2) List of all sports activities available for selection included in the appendix.

Sports behavior of actives

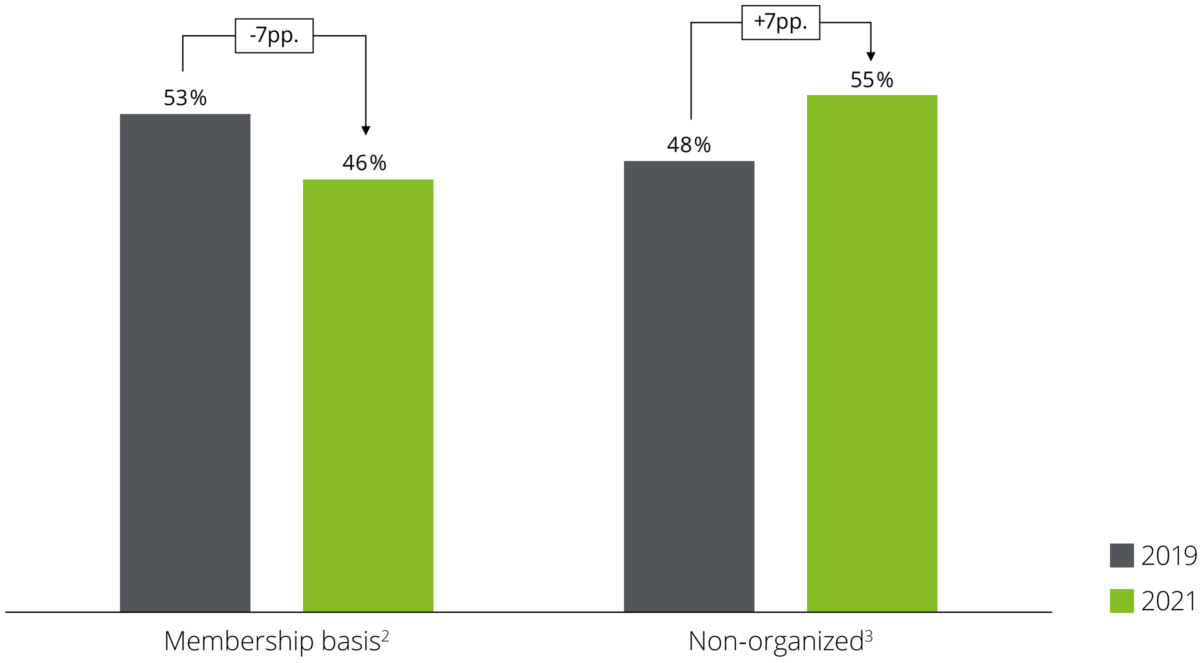
The pandemic has impacted how people engage in sports activities. While there was a 7 percentage point drop in the share of actives participating in organized sports on a membership basis (i.e., in a gym, in club sports or with a trainer), the share of actives doing sports in a non-organized setting (i.e., at home or outdoors) increased by 7 pp.

Non-organized sports activities have become more popular under pandemic-related restrictions
With the temporary closure of gyms and pandemic-related restrictions on club sports, engaging in sports in a non-organized setting has become increasingly popular. People feel compelled to exercise on their own at home or outdoors instead.

The challenge now facing gyms, clubs and trainers is how to persuade those members who left during the pandemic to come back. Initial indications from the "European Health & Fitness Market Report 2021" suggest that members did indeed return to gyms and other facilities after they reopened in spring/summer 2021, thanks to high vaccination uptake and low infection rates.

What motivated them to come back, among other things, were the range of equipment available, the social interaction, the change in scenery as well as the guidance provided. For further information, please refer to our other publications on the health and fitness market.

Fig. 10 – Organization of sports activity
"How are you organized in your sports activities?"[1]; n = 5,190

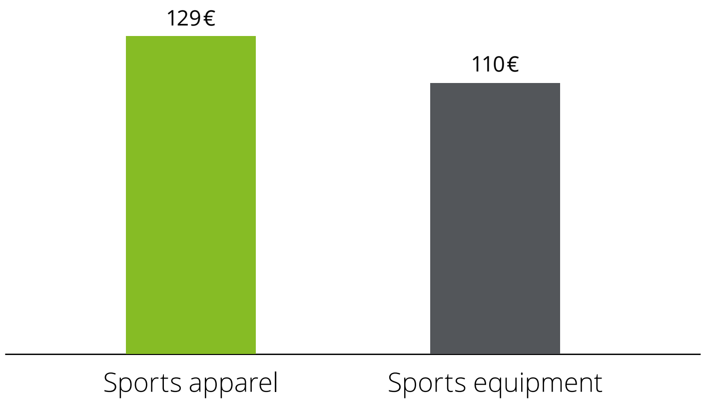


Notes: 1) Multiple answers possible; 2) Membership basis = fitness clubs, sports associations or intermediaries; 3) I.e., at home or outdoors.

Sports consumption among actives

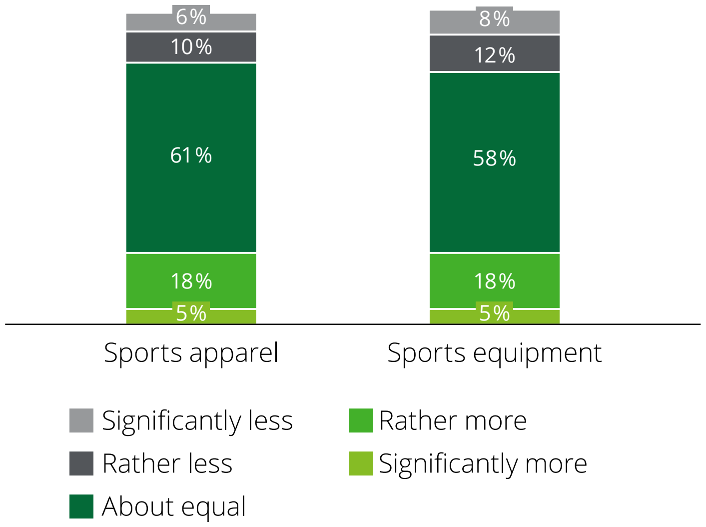
Despite the pandemic-related restrictions, actives still spent a significant amount on sports apparel and sports equipment during the past twelve months. They expect their expenditure to increase rather than decrease in future.

Fig. 11 – Average expenditure on sports apparel and equipment of actives[1,2]
"In the past twelve months, how much money have you spent on sports apparel and sports equipment?"; n = 5,190



Despite not engaging in sports on a regular basis, non-actives also report spending money on sports apparel and equipment. The main reason for this is the popular "athleisure" trend, i.e., wearing activewear in non-sports settings.

Fig. 12 – Expected change in total sports-related expenditure next year vs. current year
"Do you expect to spend more or less on sports apparel and equipment in the next twelve months?"; n = 5,190



Lower spending on sports apparel and equipment
In Deloitte's sector briefing on "Sports Behaviour and Sports Consumption during the COVID-19 Pandemic", about 30 percent of respondents report having cut back their spending on sporting goods during the pandemic (survey conducted in February and March 2020), driven in part by lower levels of sports activity.

One of the key drivers for this effect is a reduction in spending on apparel and equipment for club sports. The pandemic-related restrictions impacted spending in this area more severely than for individual sports or outdoor pursuits.

That said, once restrictions are lifted, the level of expenditure on sports apparel and equipment is expected to return to pre-pandemic levels.

Notes: 1) The research did not take the different price levels in the countries in our survey into account; 2) Including those who spent 0€ on sports apparel and equipment.

Sports consumption among actives

Brick-and-mortar stores remain the preferred purchasing channel for the majority of sporting goods consumers. However, online retailers benefitted from the switch to online shopping during temporary closures of sporting goods stores.

Brick-and-mortar stores remain the channel of choice

The share of actives buying a majority of their sporting goods online increased from 33 % in 2019 to 37 % in 2021, due in part to the temporary closure of stores across Europe during the pandemic.

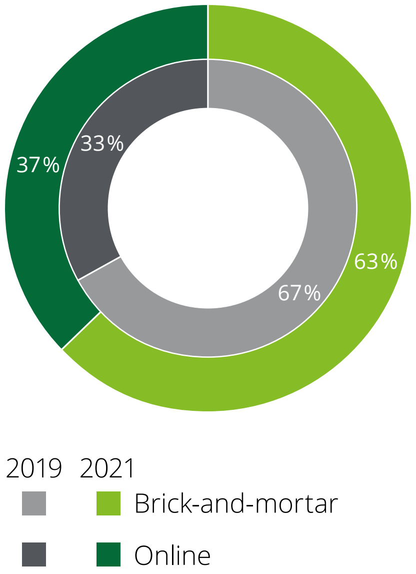
That said, when it comes to buying sporting goods, brick-and-mortar stores remain the preferred channel for the majority of actives. There are multiple reasons for this, above all: consumers value the expert advice and the opportunity to try on and test the products before buying them.

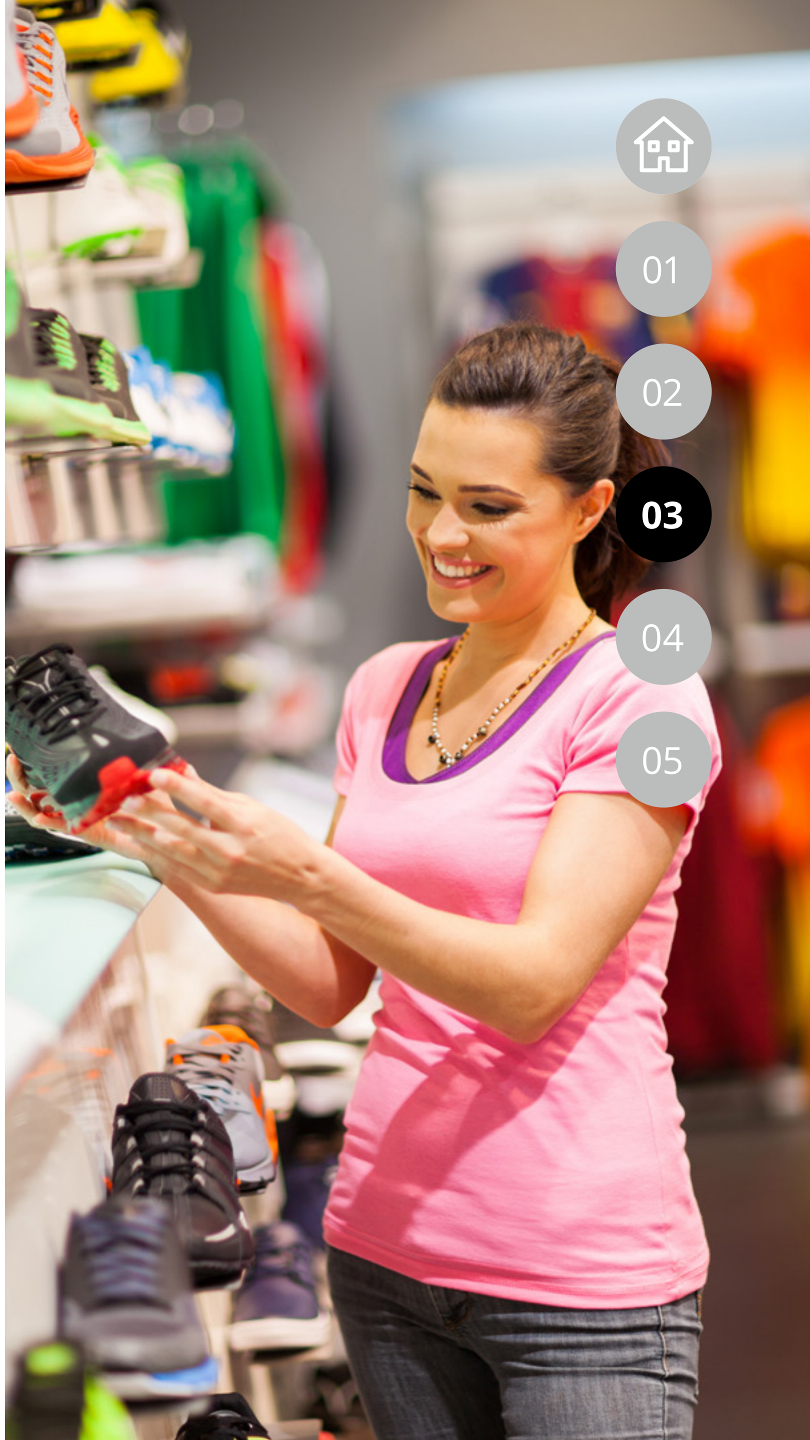
The preference for brick-and-mortar retail is particularly strong when it comes to high-value items such as e-bikes and skis.

The data from Deloitte's sector briefing on "Sports Behaviour and Sports Consumption during the COVID-19 Pandemic" indicates that a share of the consumers who switched to the online channel during the pandemic expect to return to brick-and-mortar stores following the pandemic.

Fig. 13 – Preferred purchasing channel of actives in 2021 (outer circle) vs. 2019 (inner circle)

"How do you predominantly purchase sporting goods?"; n = 5,190





Compared to 2019, more online shoppers are using their smartphones to buy sporting goods (+9 pp), while the use of a Laptop / Computer has decreased (-9 pp). More than two-thirds of these smartphone shoppers are below the age of 45.

Fig. 14 – Devices used by online shoppers
"Which device have you already used for purchasing sporting goods online?"[1];
Online shoppers among actives: n = 1,912

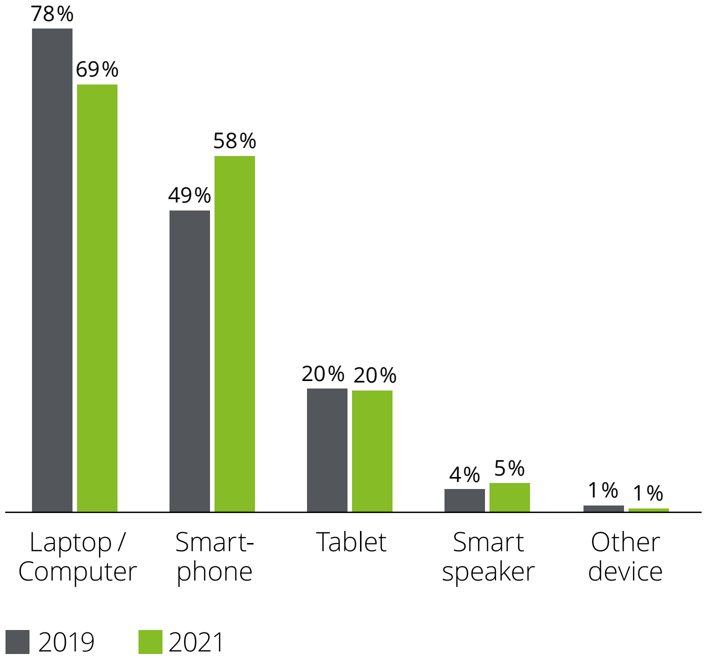
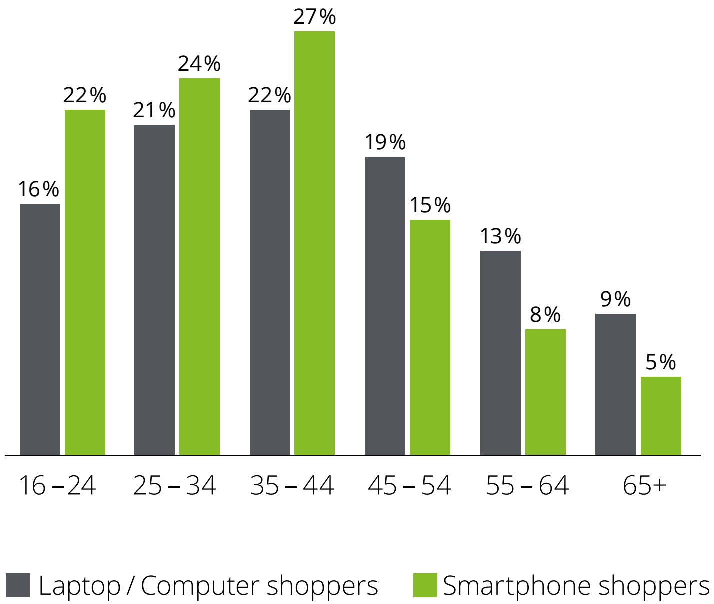


Fig. 15 – Age distribution of computer / laptop and smartphone shoppers in 2021
"Please indicate your age.";
Smartphone users: n = 1,102;
Laptop / Computer users: n = 1,322



Online shopping on smartphones is becoming more common

Among those consumers who purchase sporting goods mainly online, an increasing share are shopping on their smartphones (+9 pp vs. 2019).

Mobile shopping is especially relevant for the younger age profile, with more than two-thirds of smartphone shoppers below the age of 45.

Although the majority of online shoppers still shop on their Laptops / Computers, their share has decreased relative to the overall sample (-9 pp vs. 2019).

Notes: 1) Multiple answers possible.

About 64 % of actives are willing to pay a premium for a product that is more sustainable, an increase of 7 percentage points compared to 2019. Almost 50 % of actives would even be prepared to pay a 'green premium' of 20 % or more.

Sustainability gains relevance

The fact that actives are willing to pay a premium for sustainable sporting goods is further evidence of the increasing importance of sustainability today.

Approximately two-thirds of the actives in our survey (64 %) are willing to pay a premium for athletic footwear made with environmentally-friendly materials and sustainable manufacturing methods – an increase of 7 percentage points compared to 2019.

Almost half of them (47 %) are prepared to pay a premium in excess of 20 % of the purchase price; 12 % of them would even be willing to pay a 'green premium' of more than 50 %.

Fig. 16 – Willingness to pay a premium for sustainable products in 2021 (outer circle) vs. 2019 (inner circle)

"If you wanted to buy new sports shoes worth € 100, would you be willing to pay a premium for an identical pair with environmentally friendly materials and produced with sustainable manufacturing?";
n = 5,190

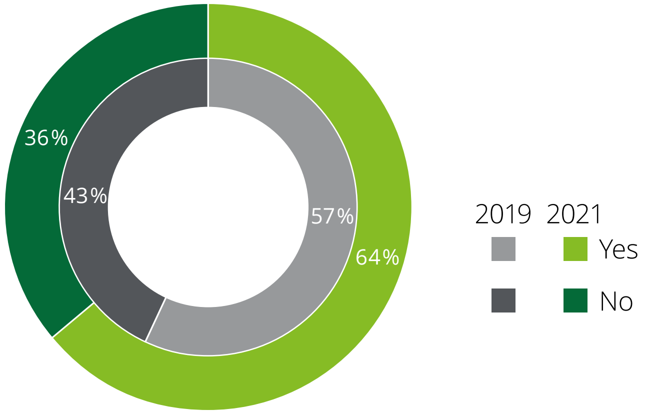
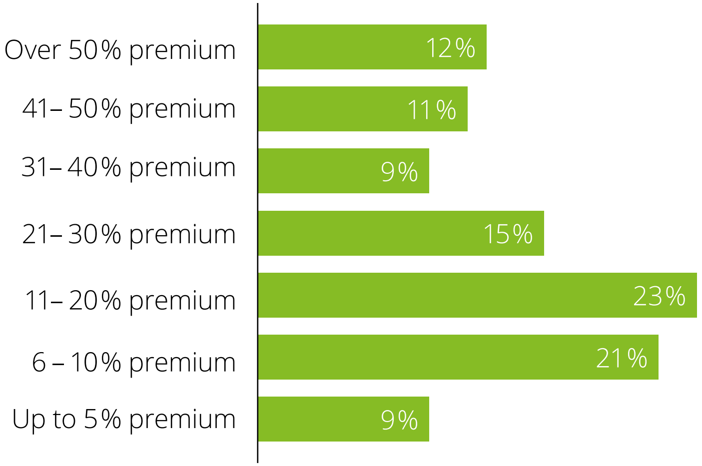


Fig. 17 – Premium prepared to pay for sustainable hiking shoes[1]

"What would the maximum premium be that you would be willing to pay for the sustainable pair of hiking shoes?";
n = 3,312



Notes: 1) The research did not take the different price levels in the countries in our survey into account.

Appendices

Sports activities

Sports activities to choose from in the underlying survey

- Alpine skiing
- American football
- Badminton
- Basketball
- Bouldering
- Dancing
- Diving
- Esports
- Fencing
- Fitness
- Golf
- Gymnastics
- Handball
- Field hockey
- Ice hockey
- Ice skating
- Rollerblading
- Martial arts
- Pilates
- Road bike racing
- Rowing
- Running
- Snowboarding
- Soccer
- Squash
- Swimming
- Table tennis
- Tennis
- Track & field
- Triathlon
- Volleyball
- Waterskiing/Wakeboarding
- Yoga
- Others
- I have not done any sports

Appendices

Your contacts

Stefan Ludwig
Partner
Head of Sports Business Groups
ludwig@deloitte.de

Karsten Hollasch
Partner
Head of Consumer Business
khollasch@deloitte.de

Dr. Felix Mutter
Senior Manager
Sports Business Group
fmutter@deloitte.de

Christian Rump
Manager
Sports Business Group
crump@deloitte.de

Sports Retail Study 2022
Results from a European consumer survey
Authors: Stefan Ludwig, Karsten Hollasch, Dr. Felix Mutter, Christian Rump, Tobias Henneke, Tim Seibert
Publication date: March 2022

Sports Business Group

More than twenty years of experience in the sports and fitness industry

Our sectors

Sports Business Group

Sports

Football

Esports

Sports Retail

Health & Fitness

Our international network offers a wide range of services, including:

- Business and financial advice
- Support with IT / digital transformation processes and business models
- Consulting and implementation of digital marketing and commerce activities
- Support for organisational development and change processes
- Transaction advisory services
- Financial, commercial, vendor and tax due diligence
- Business plan development and review
- Valuation of sports and fitness companies
- Market and location analyses
- Benchmarking analyses
- Provision of comprehensive industry knowledge
- Audit, tax and legal advisory services

Contact

Deloitte GmbH
Wirtschaftsprüfungsgesellschaft
Sports Business Group
Rather Straße 49 g
40476 Düsseldorf
Germany

Tel. +49 211 8772 4701
sportbusiness@deloitte.de

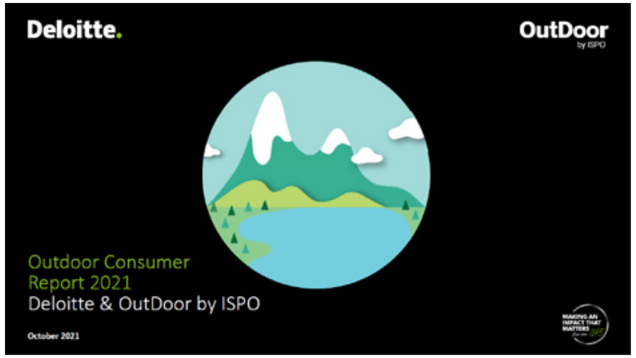
Use our QR code to find out more about Deloitte's Sports Business Group:

Sports Business Group

The latest publications of Deloitte's Sports Business Group on the retail and outdoor market

Outdoor Consumer Report 2021

A presentation of the latest developments in the behavior and spending of outdoor consumers as well as trends and drivers in the European outdoor market and recent M&A activity. As the first report of its kind, the Outdoor Consumer Report 2021 was published in cooperation with ISPO in October 2021.

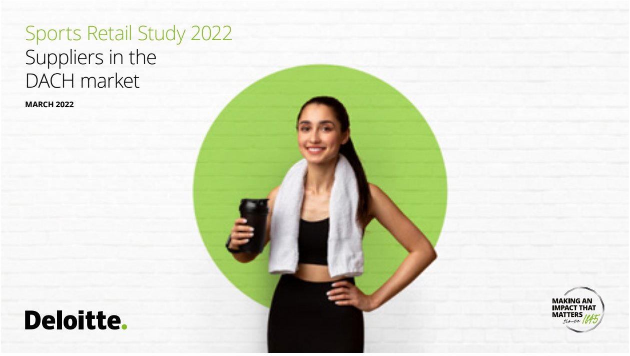


Deloitte Sector Briefings

Deloitte sector briefings analyze topics that are moving and impacting today's industries, with two briefings focused on the sports retail sector: "E-bikes on the Fast Track" and "Sports Behaviour and Sports Consumption during the COVID-19 Pandemic".

Sports Retail Study 2022 – Suppliers in the DACH market

In addition to this version of the Sports Retail Study, Deloitte also publishes a report covering the supplier market in the DACH region, which analyzes key suppliers, outlines key industry trends and highlights recent M&A activity.



03 / 2022