

# Sports Goods Retailing - Europe - 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 on the sports goods retailing sector and how it is recovering from this
- The impact of rising living costs on European consumers and how this is affecting the sports goods retailing sector
- The winners and losers in the sports goods retailing sector as we emerge into the post-COVID recovery phase
- How people shop for sports goods and which retailers they use
- Interest in sports goods innovations among sports goods buyers
- The development of the online channel within the sports goods category and the boost given to it by the COVID-19 outbreak

Driven by fewer restrictions and also investment made in expanding online operations in response to the pandemic store closures, European sports retailing recorded a strong performance in 2021. Sports goods retailers benefitted from the increased focus on health and wellbeing that is one of the legacies of the pandemic, recording double-digit sales growth across the big 5 European countries in 2021.

Spending on sports goods is mostly discretionary and so the sharp rise in the cost of living seen during 2022 in Europe presents challenges to both consumers and retailers, going forward.

Our consumer research confirms that Amazon has become an important player in most of the leading markets in terms of penetration. In Germany it is the top retailer in terms of penetration levels, while in all other countries apart from France, it is the second-most popular choice among consumers purchasing sports goods. The online giant is now a significant threat to sports goods retailers.

There are opportunities for retailers to tap into, such as growing sustainability awareness, the rising popularity of second hand and rental, experiential in-



"The European sports retail market recovered strongly in 2021 across the five leading economies in Europe as it benefitted from fewer restrictions and also investment made in expanding online operations in response to the pandemic store closures. As a discretionary spending area, the cost of living crisis could potentially hold back sales."

– Utku Tansel, European Retail Analyst

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Sports Goods Retailing - Europe - 2022

Report Price: £3195 | \$4400 | €3850

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

store retailing as well as increasing tech usage.

According to our survey, over a third of consumers in all countries tracked (ranging from 35% in France to 42% in Spain) would be interested in sportswear made from sustainable materials and retailers can cater to this through greater sustainability initiatives in-store.

Furthermore, a substantial share of European consumers (37% French, 35% Spanish, 28% Germans as well as Italian, and 26% British) would be interested in technology that provides an accurate size estimate when shopping online for sports goods. Additionally, some Europeans are also interested in using virtual/augmented reality in-store to try products – the highest being Spain with almost one fifth (18%).



### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- **Areas covered in this Report**
- **Key issues covered in this Report**
- **Financial definitions**
- **Research methodology and Products covered in this Report**
- **Consumer spending – Mintel's sports goods market size**
- **Leading retailers**
- **Abbreviations**
- **VAT rates**

Figure 1: VAT rates around in Europe big 5 markets, 2017-22

### EXECUTIVE SUMMARY – EUROPE – THE MARKET

- **The five-year outlook for sports goods retailing**  
Figure 2: Outlook for sports goods retailing, 2022
- **The market**
- **Market size and performance**  
Figure 3: Europe: estimated consumer spending on sports goods (incl VAT), 2017-21
- **Cash-strapped consumers may restrict sports goods spend**  
Figure 4: Europe: financial impact of the COVID-19 pandemic, 2022
- **Retail sector size and forecast**  
Figure 5: Europe: sports goods specialist retailers' sales (excluding VAT), 2017-23  
Figure 6: Europe Big 5: changes to spending habits as a result of the COVID-19 pandemic, 2022
- **Companies and brands**  
Figure 7: Europe: top sports & leisure goods specialists, sales, 2016/17-2020/21  
Figure 8: Europe: top sports & leisure goods retailers, outlets, 2016/17-2020/21
- **Market shares**  
Figure 9: Europe: top sports & leisure goods specialist retailers' estimated share of total sports goods spending, %, 2016/17-2020/21

### EXECUTIVE SUMMARY – EUROPE – THE CONSUMER

- **What they buy**  
Figure 10: Sports goods bought in the last 12 months, by country, 2022
- **Online vs in-store**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Europe: proportion of sports goods buyers shopping in-store and online, by country, 2022

Figure 12: Europe: proportion of sports goods buyers shopping in-store, through a device (online) and other, by country, 2022

- **Where they shop**

Figure 13: Europe: where they shopped for sports goods in the last 12 months, leading two players, by country, 2022

- **Interest in innovations in sports goods retailing**

Figure 14: Europe: those agreeing with statements about shopping for sports goods in the last 12 months, by country, 2022

## EXECUTIVE SUMMARY – EUROPE – INNOVATIONS AND LAUNCH ACTIVITY

- **Sustainability moves higher up on the agenda**

Figure 15: Emilie Burfeind's 'Sneature' combining trainers with nature, 2022

- **Rental offers affordable and environmentally-friendly alternative**

Figure 16: Decathlon and Hirestreet, 2022

- **Outdoors and sport brands maximise in-store experiential retailing**

- **Pop-ups generate buzz and excitement**

Figure 17: Marks & Spencer's Goodmove menswear collection, 2022

- **Increased focus on DTC**

- **Experimenting with new formats & collaborations to stand out**

Figure 18: Decathlon – One of the most innovative specialist retailers in Europe, 2022

- **Non-specialists step into activewear**

Figure 19: Mango active range, 2022

- **Expanding into new categories and sectors**

- **Using technology to enhance service**

Figure 20: Decathlon's 'scan & go' service, 2022

## FRANCE

- **Overview**

- **Key issues covered in this Report**

- **Market context**

- **Areas covered in this report**

- **Products covered in this Report**

- **Consumer spending – Mintel's sports goods market size**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Executive Summary**
- **The five-year outlook for sports goods retailing**  
Figure 21: Sports goods retailing outlook, 2022-27
- **The market**
- **Spending on sport bounced back in 2021**  
Figure 22: France: estimated consumer spending on sports goods (including VAT), 2017-21
- **Economic conditions could hold back spending**
- **Government support for participation in sport**
- **A vibrant retail sector**  
Figure 23: France: sports goods specialist retailers' sales (excluding VAT), 2017-23
- **Well positioned to benefit from trends in health and wellness**
- **Channels to market**
- **The consumer**
- **Younger people (especially men) shop most**  
Figure 24: France: demographic breakdown of buyers of any sports goods in the last 12 months, 2022
- **Clothing and footwear are most popular categories**
- **Potential for growth in the fitness equipment categories**  
Figure 25: France: sports goods bought in the last 12 months, 2022
- **Half of sports goods buyers had made a purchase online over the last year**  
Figure 26: France: channels used to buy sports goods, selected demographics, 2022
- **Decathlon dominates**
- **Direct to consumer is growing**  
Figure 27: France: retailers used for sports goods shopping, 2022
- **Sustainability is gaining traction**  
Figure 28: France: interest in sports goods-related innovations, selected demographics, sustainability, 2022
- **Rentals could appeal to more affluent people**  
Figure 29: France: interest in sports goods-related innovations, selected demographics, rentals, 2022
- **Finding ways to improve accurate sizing**  
Figure 30: France: interest in sports goods-related innovations, technology, 2022
- **An opportunity in sportswear subscriptions**  
Figure 31: France: interest in sports goods-related innovations, subscriptions, 2022

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Companies and brands**
- **Decathlon and Intersport dominate**  
Figure 32: France: leading sports goods specialists, shares of all sports goods specialists' sales, 2021
- **Issues and insights**
- **The impact of rising prices on sports goods retailers**
- **Price**
- **Services**
- **Payment**
- **The circular economy**
- **The opportunities in cycling**
- **E-bikes/vélos à assistance électrique (VAE)**
- **Government support**
- **Sustainability, the pandemic and the cost of living crisis have all increased interest**
- **The opportunity**
- **Market size and performance**
- **Sports goods spending was €12.7 billion in 2021**  
Figure 33: France: estimated consumer spending on sports goods (including VAT), 2017-21
- **COVID-19 has boosted interest in wellbeing**
- **Retailers could benefit from the Olympic Games in France in 2024**
- **Retail sector size and forecast**
- **COVID-19 caused uncertainty but retailers responded well online**  
Figure 34: France: sports goods specialist retailers' sales (excluding VAT), 2017-23
- **Channels to market**
- **Market drivers**
- **Ukraine represents a shock to the French economy**
- **The government's shield on energy price rises**  
Figure 35: France: key economic projections, % annual change, 2019-24
- **Employment has been resilient**
- **Inflation is rising on sports goods**  
Figure 36: France: consumer prices\* of categories relevant to sports goods, annual % change, 2017-21  
Figure 37: France: consumer price inflation (HICP\*) of equipment for sport, annual % change, 2020-22
- **Consumer confidence has slipped from its recent high point**  
Figure 38: France: trends in levels of consumer confidence\*, 2020-22

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **People are increasingly worried about the cost of living**  
Figure 39: France: consumer concerns about household finances, 2022
- **The conflict in Ukraine will hurt the French economy**  
Figure 40: France: expected impact of the Ukraine crisis on French consumers, 2022
- **Government support for participation in sport**
- **Engagement in sport is highest amongst the young**  
Figure 41: France: engagement in out-of-home pastimes and activities, 2022
- **The consumer**
- **Sports goods purchased in the last year**
- **Concern for wellbeing is a positive driver for sports goods retailers**  
Figure 42: France: demographic breakdown of buyers of any sports goods in the last 12 months, 2022
- **Trainers and clothing dominate**
- **Potential for growth in the fitness equipment categories**
- **Men buy more equipment, women more clothing**  
Figure 43: France: sports goods bought in the last 12 months, 2022
- **Younger men buy most**  
Figure 44: France: sports goods bought in the last 12 months, by selected demographics, 2022
- **Online and in-store shopping for sports goods**  
Figure 45: France: channels used to buy sports goods, 2022  
Figure 46: France: channels used to buy sports goods, selected demographics, 2022  
Figure 47: France: usage of a smartphone to buy sports goods, selected demographics, 2022  
Figure 48: France: channels used to buy sports goods, in-store and online, by products bought, 2022
- **Where sports goods are purchased**
- **Decathlon dominates**
- **Direct to consumer is growing**
- **Fashion ahead of the grocers**
- **Amazon is less influential than in other countries**  
Figure 49: France: retailers used for sports goods shopping, 2022
- **Demographic profiles**  
Figure 50: France: age demographics of shoppers at selected sports goods retailers, 2022

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 51: France: age demographics of shoppers at selected sports goods retailers, 2022

- Interest in innovations in sports goods retailing**

Figure 52: France: interest in sports goods-related innovations, 2022

- Sustainability is gaining traction**

Figure 53: France: interest in sports goods-related innovations, selected demographics, sustainability, 2022

- Rentals could appeal to more affluent people**

Figure 54: France: interest in sports goods-related innovations, selected demographics, rentals, 2022

Figure 55: France: interest in sports goods-related innovations by retailer shopped, 2022

- Technology will drive interest**

Figure 56: France: interest in sports goods-related innovations, technology, 2022

Figure 57: France: interest in sports goods-related innovations by retailer shopped, 2022

- An opportunity in sportswear subscriptions**

Figure 58: France: interest in sports goods-related innovations, subscriptions, 2022

Figure 59: France: interest in sports goods-related innovations by retailer shopped, 2022

- Companies and brands**

- Leading players**

- Recent restructuring**

- Decathlon, the innovator**

- Ambitious Intersport**

- Sport 2000 filling in the gaps**

- Smaller niche players are challenging the generalists**

- Services are being added to the offer**

Figure 60: France: leading sports goods specialists, sales, 2019-21

Figure 61: France: leading sports goods specialists, outlets, 2019-21

- Market shares**

Figure 62: France: leading sports goods specialists, shares of all sports goods specialists' sales, 2019-21

- Online**

- Online activity**

- Online sales of sports goods**

- Leading online players**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Appendix – Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**
- **INSTITUT NATIONALE DE LA STATISTIQUE ET DES ÉTUDES ÉCONOMIQUES (INSEE) – Paris**
- **FEVAD – La Fédération du e-commerce et de la vente à distance – Paris**
- **EUROSTAT – Luxembourg**
- **FÉDÉRATION NATIONALE PROFESSION SPORT & LOISIRS (NATIONAL SPORTS & LEISURE PROFESSION FEDERATION) – La Rochelle**
- **MINISTÈRE CHARGÉ DES SPORTS**
- **L'INSTITUT NATIONAL DE LA JEUNESSE ET DE L'ÉDUCATION POPULAIRE (INJEP)**

## ITALY

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this Report**
- **Products covered in this Report**
- **Consumer spending – Mintel's sports goods market size**
- **Executive summary**
- **The five-year outlook for sports goods retailing**  
Figure 63: Italy: Sports goods retailing outlook, 2022-27
- **The market**
- **Market size and forecast**  
Figure 64: Italy: consumer spending on sports goods (incl VAT), 2017-21
- **Retail sector size and forecast**  
Figure 65: Italy: sports goods specialist retailers' sales (excluding VAT), 2017-23
- **Market drivers**
- **The consumer**
- **Sports goods purchased**  
Figure 66: Italy: sports goods purchased in the last 12 months, 2022
- **Channels used to purchase sports goods**  
Figure 67: Italy: channels used to purchase sports goods in the last 12 months, 2022
- **Where sports goods are purchased**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 68: Italy: where sportswear or sports footwear purchased in last 12 months, 2022

- **Interest in sports goods innovations**

Figure 69: Italy: interest in sportswear or sports footwear innovations, 2022

- **Companies and brands**
- **Decathlon consolidates market leadership with online expansion and continuous innovation**

Figure 70: Italy: leading sports goods specialists, shares of all sports goods retailers' sales, 2021

- **Issues & Insights**
- **How can sports goods retailers stay relevant for their customers during the cost of living crisis?**
- **Disposable incomes are being squeezed**
- **Honesty and transparency is the best policy**
- **Making it easier to pay for goods**
- **Flash deals can create a sense of urgency**
- **The cost of living crisis does not affect all Italians the same way**
- **How can sports goods retailers add value to their offer?**
- **Expectations for customisation and personalisation are increasing**
- **Decathlon points the way forward when it comes to sustainability**
- **Accurate online sizing could unlock much stronger online sales**
- **Rapid delivery services offer the chance to further segment fulfilment propositions**
- **Pop-ups can test water or meet seasonal/temporary demand**
- **A new type of relationship with customers**
- **There is scope for more and deeper third party partnerships**
- **Market size and performance**

Figure 71: Italy: consumer spending on sports goods (incl. VAT), 2017-21

- **Retail sector size and performance**

Figure 72: Italy: sports goods specialist retailers' sales (excl. VAT), 2017-23

- **Channels to market**
- **Market drivers**
- **The economy**
- **Inflation**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 73: Italy: consumer price inflation\*, annual % change, 2017-21

Figure 74: Italy: consumer price inflation\* for sports equipment annual % change, 2020-22

Figure 75: Italy: issues affecting consumers over the last two months, 2021 and 2022

- **The conflict in Ukraine will hurt the Italian economy**
- **Consumer confidence falters after recovery**

Figure 76: Italy: trends in levels of consumer confidence\*, 2020-22

- **The continuing influence of COVID**

Figure 77: Italy: changes in spending habits since the start of the outbreak, 2021-22

- **Technology ownership and usage**

Figure 78: Italy: activities done on household computers and smartphones in last three months\*, 2021

- **Sports participation**

Figure 79: Italy: trends in sports participation, 2017-21

Figure 80: Italy: sports participation among men, by age group, 2021

Figure 81: Italy: sports participation among women, by age group, 2021

Figure 82: Italy: sports participation, by broad region, 2021

Figure 83: Italy: participation in outdoor activities and visiting gym/leisure centre in last 12 months, 2022

- **The consumer**
- **Sports goods purchased**

Figure 84: Italy: sports goods purchased in the last 12 months, 2022

- **Shopper demographics**
- **Channels used to purchase sports goods**

Figure 85: Italy: channels used to purchase sports goods in the last 12 months, 2022

- **Channel demographics**

Figure 86: Italy: sports goods purchased in the last 12 months, by channels used to purchase sports goods in the last 12 months, 2022

- **Where sports goods are purchased**

Figure 87: Italy: where sportswear or sports footwear purchased in last 12 months, 2022

- **Retailer demographics**
- **Amazon leads online channel but Decathlon is competing well**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 88: Italy: where sportswear or sports footwear purchased in last 12 months, by channels used to purchase sports goods in the last 12 months, 2022

- **Retailer appeal by products bought tends to match demographic strengths**

Figure 89: Italy: where sportswear or sports footwear purchased in last 12 months, by sports goods purchased in the last 12 months, 2022

- **Shift to D2C on part of Adidas and Nike may pull some customers away from Decathlon?**

Figure 90: Italy: where sportswear or sports footwear purchased in last 12 months, by where sportswear or sports footwear purchased in last 12 months, 2022

- **Interest in innovations in sports goods retailing**
- **Italians interested in sustainable sportswear...**
- **...as well as alternatives to outright ownership**
- **Technology to enable customisation and personalisation also appeals**
- **A growing opportunity for sportswear incorporating wearable technology**
- **Virtual reality offers opportunity for try-outs without using too much space**

Figure 91: Italy: interest in sportswear or sports footwear innovations, 2022

- **Existing sports equipment buyers are keen on renting equipment**

Figure 92: Italy: interest in sportswear or sports footwear innovations, by sports goods purchased in the last 12 months, 2022

- **Amazon and other online shoppers most interest in sizing technology**

Figure 93: Italy: interest in sportswear or sports footwear innovations, by where sportswear or sports footwear purchased in last 12 months, 2022

- **Companies and brands**
- **Decathlon**
- **Intersport**
- **Sport Alliance**
- **Other players**
- **D2C players**

Figure 94: Italy: leading sports goods specialists, sales, 2019-21

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 95: Italy: leading sports goods specialists, outlets, 2019-21

- **Market shares**

Figure 96: Italy: leading sports goods specialists, shares of all sports goods retailers sales, 2019-21

- **Online**
- **Online activity**
- **Online sales of sports goods**
- **Leading online players**

Figure 97: Italy: trends in Google searches for Decathlon and Cisalfa in last 12 months, 2022

- **Appendix – Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**
- **ISTITUTO CENTRALE DI STATISTICA (ISTAT) – Rome**
- **EUROSTAT – Luxembourg**

**SPAIN**

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this report**
- **Products covered in this Report**
- **Consumer spending – Mintel’s sports goods market size**
- **Executive summary**
- **The five-year outlook for sports goods retailing**

Figure 98: Spain: outlook for sports goods retailing, 2022-26

- **The market**
- **Market size and forecast**

Figure 99: Spain: estimated sports market size including VAT, 2017-21

- **Retail sector size and forecast**
- Figure 100: Spain: sports goods specialist retailers’ sales (excluding VAT), 2017-21

- **Market drivers**
- **Channels to market**
- **The consumer**
- **Sports goods purchased**

Figure 101: Spain: sports goods purchased in the last 12 months, 2022

- **In-store and online shopping for sports goods products**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 102: Spain: channels used to buy sports goods in the last 12 months, 2022

- **Where sports goods are purchased**

Figure 103: Spain: retailers used to purchase sports goods in the last 12 months, 2022

- **Interest in services and products relating to sports goods**

Figure 104: Spain: interest in services and products relating to sports goods, 2022

- **Companies and brands**

- **Leading players**

- **Market shares**

Figure 105: Spain: leading sports goods specialists, estimated shares of all sports goods retailers sales, 2019-21

- **Online**

- **Issues and insights**

- **Cost of living crisis putting a strain on the most prolific lifestyle purchasers of sports goods**

- **Local ethical trainer brand taking on the global sneaker giants**

- **Market size and performance**

Figure 106: Spain: estimated sports market size including VAT, 2017-21

- **Retail sector size and forecast**

Figure 107: Spain: sports goods specialist retailers' sales (excluding VAT), 2017-23

- **Channels to market**

- **Store-based specialists the largest channel of distribution**

Figure 108: Spain: channels used to buy sportswear or sports footwear in the last 12 months, 2022

- **Market drivers**

- **Economic growth downgraded amid spiralling inflation**

Figure 109: Spain: key economic projections, % annual change, 2019-23

- **Inflation on the rise**

Figure 110: Spain: consumer prices\* of categories relevant to sports goods, annual % change, 2017-21

- **Sports equipment price hike**

Figure 111: Spain: consumer price inflation (HICP\*) of equipment for sport, annual % change, 2020-22

- **Consumer confidence plummets to a level almost as low as in the first COVID-19 wave**

Figure 112: Spain: trends in levels of consumer confidence\*, 2020-22

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Pressure on household budgets reflected in sports goods purchasing levels**

Figure 113: Spain: financial impact of the COVID-19 pandemic, 2022

- **Affluent consumers fuelling additional discretionary spending on hobbies/pastimes**

Figure 114: Spain: additional discretionary spending priorities, 2022

- **The conflict in Ukraine will hurt economy**

- **Sporting and outdoor activity participation highest among women and younger people**

Figure 115: Spain: out-of-home pastimes and activities, 2022

- **The consumer**

- **Sports goods purchased**

- **Athleisure items the most popular purchases**

Figure 116: Spain: sports goods purchased in the last 12 months, 2022

- **Men the most prolific sports goods buyers**

Figure 117: Spain: sports goods purchased in the last 12 months, by gender, 2022

- **Sports goods purchasing peaks among Gen Z, but opportunity to target ageing consumer market**

Figure 118: Spain: sports goods purchased in the last 12 months, by age, 2022

- **In-store and online shopping for sports goods products**

- **Majority of sports goods purchases occur in-store, but brands cannot ignore online**

Figure 119: Spain: channels used to buy sports goods in the last 12 months, 2022

- **A blend of clicks-and-bricks key to attracting the sector's biggest purchasers**

Figure 120: Spain: usage of stores vs online when buying sports goods in the last 12 months, 2022

- **Laptop/desktop PC currently the most popular method for online purchasing, but momentum shifting to smartphone**

Figure 121: Spain: methods used for online purchasing of sports goods, in the last 12 months, 2022

- **Where sports goods are purchased**

- **Decathlon the single most popular retail destination for sports goods purchasing**

Figure 122: Spain: retailers used to purchase sports goods in the last 12 months, 2022

- **Interest in innovations in sports goods retailing**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Sustainability, personalisation and virtual reality opportunities**

Figure 123: Spain: interest in services and products relating to sports goods, 2022

- **Demand for sustainably-sourced sportswear**

Figure 124: Spain: interest in services and products relating to sports goods, 2022

- **Over a third of buyers feeling unsatisfied with uniformity**

Figure 125: Spain: interest in services and products relating to sports goods, 2022

- **Perfect fit first-time is key to unlocking higher online sportswear sales**

Figure 126: Spain: interest in services and products relating to sports goods, 2022

- **Consumers need convincing sportswear/accessories that include wearable technology is a genuine must-have**

Figure 127: Spain: interest in services and products relating to sports goods, 2022

- **Virtual reality experiences an opportunity to boost sales**

Figure 128: Spain: interest in services and products relating to sports goods, 2022

- **Sports equipment rental can be a cost-effective and eco-friendlier alternative**

Figure 129: Spain: interest in services and products relating to sports goods, 2022

- **Companies and brands**

- **Leading players**

- **Décathlon betting on Amazon-style marketplace and enhanced in-store offering**

- **Adidas bolstering its Spanish operations by opening more branded stores**

- **Intersport brings physical and digital together**

- **Forum Sport accelerates on the net**

- **Iberian Sports Retail Group strengthens digital presence with acquisition of Deporvillage**

- **Décimas unveils new digitally-enhanced store concept post-lockdown**

- **Foot Locker introduces new casual fashion trainer chain**

- **Nike bolsters physical presence with new eco-focused flagship in Barcelona**

Figure 130: Spain: leading sports goods specialists, sales, 2019-21

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 131: Spain: leading sports goods specialists, outlets, 2019-21

- **Market shares**

Figure 132: Spain: leading sports goods specialists, estimated shares of all sports goods retailers sales, 2019-21

- **Online**
- **Online activity**
- **Online sales of sports goods**
- **Appendix – Data sources, consumer research methodology and abbreviations**
- **Abbreviations**
- **Consumer research methodology**
- **Data sources**
- **INSTITUTO NACIONAL DE ESTADISTICA (INE) – Madrid**
- **EUROSTAT – Luxembourg**

## UK

- **Overview**
- **Key issues covered in this Report**
- **Market context**
- **Products covered in this Report**
- **Executive summary**

- **The five-year outlook for sports goods**

Figure 133: Category outlook for sports goods retailing, 2022-27

- **The market**
- **Industry growth to normalise as cost pressures rise**

Figure 134: Market forecast sports goods, 2016-26

- **Fewer active adults**

Figure 135: Number of UK adults aged 16+ taking part in sport at least twice in 28 days, 2016-21

- **Participation in sports has risen...**

Figure 136: Adult participation (aged 16+) in leisure/sporting activity in England, 2016/17-2020/21

- **...but consumers are still wary of gym and sports activities**

Figure 137: Consumer attitudes towards participation in activities, 2021-22

- **Advertising spend accelerates in 2021**

Figure 138: Total above-the-line, online display and direct mail advertising expenditure on sports goods, 2018-21

- **Companies and brands**

Figure 139: Key metrics for selected brands, 2022

- **Sports goods brands and their active innovations**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **JD Sports and Sports Direct come out on top as specialists**  
Figure 140: Sports goods specialists revenues, 2017-21
- **The consumer**
- **At-home exercise remains high even after restrictions end**  
Figure 141: Sports participation over the last 12 months, 2022
- **Consumer comfort drives purchasing**  
Figure 142: Types of sports goods purchased in the last 12 months, 2022
- **Online shopping remains the preference for sports goods**  
Figure 143: Channels used to purchase sports goods, 2022
- **Amazon and Sports Direct compete for most used sports goods retailer**  
Figure 144: Retailers used to purchase sports goods, 2022
- **Athleisurewear and versatility driving consumer purchasing**  
Figure 145: Attitudes towards sportswear and sports goods, 2022
- **An emphasis on sustainability for sports goods**  
Figure 146: Interest in sports goods innovations, 2022
- **Issues and insights**
- **The cost-of-living squeeze on the sports goods market**
- **Increasing interest in health and wellbeing since the COVID-19 pandemic**
- **Opportunities for growth in the sports goods market**
- **Sports and sustainability**
- **In-store and immersive experiences can connect retailers and consumers**
- **Athleisure trend remains strong**
- **eCommerce and e-sports**
- **Market size and performance**
- **Strong performance for sports goods in 2021**  
Figure 147: Market size for sports goods, 2016-2021
- **Growth expected to continue for sports goods**
- **Market forecast**
- **Five-year outlook for sports goods**  
Figure 148: Category outlook for sports goods, 2022-27
- **Growth to normalise for sports goods**  
Figure 149: Market forecast sports goods, 2016-26
- **Sales to dampen as cost pressures rise**  
Figure 150: Consumer spending on sports goods, 2016-26
- **Market drivers and assumptions**  
Figure 151: Key drivers affecting Mintel's market forecast, 2016-26
- **Forecast methodology**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Market drivers**
- **Saving still a priority for consumers**  
Figure 152: Trends in what extra money is spent on, 2022
- **Fewer active adults**  
Figure 153: Number of UK adults aged 16+ taking part in sport at least twice in 28 days, 2016-21
- **Participation in sports has risen...**  
Figure 154: Adult participation (aged 16+) in leisure/sporting activity in England, 2016/17-2020/21
- **...but consumers are still wary of gym and sports activities**  
Figure 155: Consumer attitudes towards participation in activities, 2021-22
- **GDP reached pre-pandemic levels in November 2021...**
- **...but the post-COVID-19 bounceback will be followed by a period of slower growth**
- **Employment has held up better than expected**
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
- **Consumers' financial wellbeing has slipped from its recent high point...**  
Figure 156: Household financial wellbeing index, 2019-22
- **...and inflation has become the key concern for consumers and brands**  
Figure 157: Consumer concerns about household finances, 2021-22
- **The conflict in Ukraine will hurt the UK economy**
- **Key demographics to be impacted by rising inflation**  
Figure 158: Real wage growth – Average weekly earnings vs inflation, 2016-22
- **Launch activity and innovation**
- **Brand and product launches**
- **Vuori launches in the UK**
- **Lululemon launches first ever shoe collection**
- **Sportswear platform Apparelle launches**
- **Adidas launches 'extensive' new sports bra collection**
- **Peloton extend Strive Score to app-only users**
- **Missguided launches new activewear range**
- **New Balance partners with District Vision to launch activewear and micro-courses on mental health**
- **Stores and in-store concepts**
- **Gymshark London store set to open summer 2022**
- **Niketown London gets children involved in experiential sports through PLAYLab**

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Lululemon to open 20th UK store**  
Figure 159: Lululemon's latest UK store, Brighton, 2022
- **M&S open pop-up to showcase latest Goodmove activewear range**  
Figure 160: Marks and Spencer's Goodmove menswear collection, 2022
- **Decathlon open shop-in-shop in Tesco**
- **German sportswear brand BSTN opens in the UK**
- **Sustainable sports**
- **Decathlon moves into the rental market with Hirestreet partnership**  
Figure 161: Decathlon and Hirestreet, 2022
- **Nike football kits made from 95% recycled plastic water bottles**
- **Brompton expand pay-as-you-go scheme to include subscription service**
- **Patagonia's Worn Wear Tour returns to Europe**
- **Into the metaverse**
- **Nike acquires metaverse brand RTFKT**
- **Alo Yoga enters Roblox with virtual wellness experience**
- **Mergers/collaborations**
- **Adidas partners with Bored Ape Yacht Club**
- **Adidas and Pharrell Williams launch Humanrace premium basics collection**
- **Zara partners with TRX Training Club to stock new sportswear product**
- **Innovations in materials**
- **Carbon38 launches a new technical fabric in its collection**
- **Nike's latest shoe glueless for easier recycling**
- **Adidas reveal Futurecraft Strung technology to construct trainers**
- **Advertising and marketing activity**
- **Advertising spend accelerates in 2021**  
Figure 162: Total above-the-line, online display and direct mail advertising expenditure on sports goods, 2018-21
- **Growth in digital spend bolstered by online-heavy campaigns**  
Figure 163: Percentage of total above-the-line, online display and direct mail advertising expenditure on sports goods, by media type, 2018-21
- **Peloton continues to be the majority ad spender**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 164: Total above-the-line, online display and direct mail advertising expenditure on sports goods, top 10 spenders, 2018-21

- **Brands increase their digital ad spend, but some still rely on TV**

Figure 165: Total above-the-line, online display direct mail advertising expenditure on sports goods, top 10 spenders percentage by media type, 2021

- **Latest campaigns**
- **Nike launches “Own The Floor” dance campaign**
- **Adidas releases latest chapter of “Impossible is Nothing” campaign**
- **Asics “Mind Race” campaign showcases the link between movement and mental health**

Figure 166: Asics Mind Race campaign, 2022

- **Peloton campaign highlights formerly sceptical members**
- **Sports Direct launches “Save The Bumblebees” campaign**
- **Nielsen Ad Intel coverage**
- **Brand research**

Figure 167: Attitudes towards and usage of selected brands, 2022

- **Key brand metrics**

Figure 168: Key metrics for selected brands, 2022

- **Brand attitudes: Sports Direct viewed as good value**

Figure 169: Attitudes, by brand, 2022

- **Brand personality: Gymshark viewed as ethical and fun**

Figure 170: Brand personality – Macro image, 2022

- **Lululemon and Sweaty Betty stylish, yet pricey**

Figure 171: Brand personality – Micro image, 2022

- **Brand analysis**
- **Gymshark viewed as diverse and fun**
- **Lululemon perceived as more expensive**
- **Sweaty Betty considered a stylish brand**
- **JD Sports holds the most awareness**
- **Sports Direct most well-known and accessible**

- **Leading retailers**

- **Sports retailers: JD Sports and Sports Direct come out on top**

Figure 172: Sports goods specialists revenues, 2017-21

- **Leading specialists store numbers**

Figure 173: Sports goods specialists outlet numbers, 2017-21

- **Sports participation**
- **At-home exercise remains high even after restrictions end**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 174: Sports participation over the last 12 months, 2022

- **Sports goods purchased**
- **Footwear and athleisurewear the most purchased products**

Figure 175: Types of sports goods purchased in the last 12 months, 2022

- **Generation Z the main purchasers of sports goods**  
Figure 176: Types of sports goods purchased in the last 12 months, by demographic, 2022
- **Young males the top purchasers of fitness equipment**  
Figure 177: Fitness equipment purchased in the last 12 months, by gender and age group, 2022

- **Channels and retailers used**
- **Online shopping remains the preference for sports goods**  
Figure 178: Channels used to purchase sports goods, 2022
- **Amazon and Sports Direct compete for the most used retailer**

Figure 179: Retailers used to purchase sports goods, 2022

- **Attitude towards sports goods**
- **Crossover between sports goods and fashion drives purchasing of sportswear**  
Figure 180: Attitudes towards sportswear among consumers, 2022

- **Males show more interest in the latest sportswear trends**  
Figure 181: Attitudes towards buying the latest sportswear trends, by gender, 2022

- **Interest in innovations**
- **Sustainable sportswear peaks consumer interests**  
Figure 182: Interest in sports goods innovations, 2022

- **Opportunities within personalised items and the rental space**
- **Appendix – Data sources, abbreviations and supporting information**
- **Abbreviations**
- **Consumer research methodology**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.