

**Deloitte.**



Sports Retail Study 2020  
Findings from a Central  
European consumer survey

**Sports Business Group**

**The data presented in this report are based on a survey conducted in December 2019. Nevertheless, we briefly address the dramatic developments in relation to the global COVID-19 pandemic that is also heavily affecting Central Europe.**

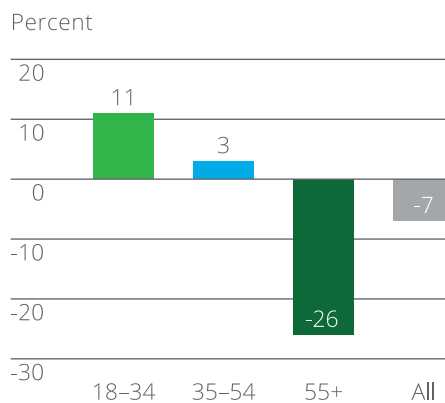
When this report was published, in the middle of May 2020, major lockdowns initiated throughout March 2020 were still in place in most European countries and around the world. Despite first minor steps back towards normality, major restrictions still constrain the economy and social life. Even though the final effects cannot yet be determined, the COVID-19 pandemic is having an unprecedented impact on the sports retail sector as well as the personal life of each and every one of us.

The lockdowns and restrictions initiated by governments throughout the world have also had a major impact on sporting behaviour. While gyms, clubs and associations were mostly closed and social distancing regulations were introduced, people were highly limited in their selection of sports activities. Nevertheless, many have resorted to digital offerings and individual non-contact sports.

In order to grasp the impact on consumer behaviour, Deloitte is conducting a longitudinal biweekly survey of consumers across 13 countries from April till the end of September 2020. The results are presented online in a Consumer Tracker. As of 29th April 2020, 28% of respondents in Germany were concerned about losing their job while 53% were concerned about the health of their family. Such concerns necessarily have an effect on consumer behaviour. For example, 38% of respondents in Germany indicated to be delaying large purchases.

Among other product categories, the Deloitte Consumer Tracker analyses information with regard to apparel and footwear. This being the parent category of sports apparel, the results can give initial indications for the sporting goods industry. The share of consumers intending to reduce their expenditure on apparel and footwear in the next four weeks (as of 29th April 2020) outweighs the share of consumers intending to increase their expenditure by 7%. However, as demonstrated in the figure below, there are major differences between the age groups.

**Net spending intent<sup>1</sup> of respondents in Germany over the next four weeks compared to the past four weeks for apparel/footwear as at 29th April 2020**



Note: 1) Net spending intent defined as the share of consumers intending to increase their expenditure minus the share of consumers intending to decrease their expenditure.  
Source: Deloitte Consumer Tracker

Furthermore, 46% of respondents indicated to intend purchasing apparel/footwear products online. In the survey underlying the present Sports Retail Study conducted in December 2019, only 39% of respondents who do sports on a regular basis indicated to prefer the online channel for purchasing sports related goods. This suggests that the online channel gained importance amidst the COVID-19-crisis.

As you will find in this report, the sports retail market showed strong performance indicators as of December 2019 and the majority of respondents were planning to maintain or even increase their level of spending for sports related goods.

The data presented in this report are thus based on pre-COVID-19-conditions. All questions posed regarding sports behaviour and consumption behaviour of sporting goods do not reflect the current crisis.

The good news is that sports remain essential to society and, due to a lack of access to sports facilities many have switched to physical activity in and/or from home. In turn, this brings along new opportunities for the sporting goods industry.

We encourage everyone to stay strong and wish you all the very best in these challenging times.

**Karsten Hollasch and Stefan Ludwig**



# Executive summary

In December 2019, Deloitte conducted a survey of sports consumers in eight Central European countries. A total of 6,028 people aged between 18 and 65 were surveyed on their levels of sports activity and sports consumption. For each country, the distribution of respondents approximately corresponds to the gender, age and geographic distribution of the underlying population.

**Level of activity:** Of the total number of respondents, 3,911 (64,9%) reported being active in at least one type of sport ("actives"). Poland has the highest share of actives (76.2%), followed by France (69.7%), Austria (67.8%) and Germany (64.8%). On average, actives in Bulgaria spend approximately 9 hours per week on sports, which is about three hours more than actives in France. Running, fitness and swimming are the top three sports among the countries surveyed.

**Sports expenditure:** On average, actives in Austria spend most on sports apparel (€154 annually) and equipment (€141) among the countries surveyed. In all countries, more money is spent on sports apparel than on sports equipment. Further analysis shows that even non-actives (i.e. respondents who reported being not active in at least one type of sport) have significant spending on sports apparel.

**Preferred shopping channel:** In all countries surveyed, the majority of actives purchase their sporting goods and services preferably in stationary stores. In France, Austria and Bulgaria, the share of these "Stationary shoppers" is above 70%, while "Online shoppers" are most prevalent in the Czech Republic (42.9%) and Germany (38.6%).

**Sustainability:** Across all countries surveyed, environmentally friendly materials and manufacturing processes have the potential to influence shopping decisions for sporting goods<sup>1</sup>. Overall, with 63,1%, actives in Austria are most likely to pay premiums for environmentally friendly materials and processes. On average, they are also willing to pay the highest premium (€20.24). At the other end, in Germany (48.9%) and France (48.4%) the lowest share of actives indicated their willingness to pay a premium. Please note that premiums are not adjusted to local price levels.

Note: 1) We asked respondents to imagine purchasing new sports shoes worth €100. They were given the choice between two almost identical pairs (in terms of brand, design, fit, etc.). Pair 1 only differed from Pair 2 by the environmentally friendly materials and manufacturing process used. Respondents were then asked how much of a premium they were willing to pay for the more environmentally sustainable Pair 2.

Country	Level of activity	Most popular sport	Sports expenditure <sup>2</sup>	Preferred shopping channel	Sustainability
<b>Germany</b>	64.8% share of actives <sup>1</sup>	Fitness (42.4%)	€135 on sports apparel	 61.4%	48.9% willing to pay premium
	6.1h/week time spent on sports		€71 on sports equipment	 38.6%	€13.34 average premium
<b>France</b>	69.7% share of actives <sup>1</sup>	Running (29.2%)	€135 on sports apparel	 76.2%	48.4% willing to pay premium
	5.8h/week time spent on sports		€72 on sports equipment	 23.8%	€19.26 average premium
<b>Poland</b>	76.2% share of actives <sup>1</sup>	Running (58.9%)	€106 on sports apparel	 61.5%	62.1% willing to pay premium
	8.6h/week time spent on sports		€87 on sports equipment	 38.5%	€9.56 average premium
<b>Romania</b>	63.7% share of actives <sup>1</sup>	Running (44.9%)	€120 on sports apparel	 63.4%	62.9% willing to pay premium
	8.2h/week time spent on sports		€69 on sports equipment	 36.6%	€8.47 average premium
<b>Czech Republic</b>	55.7% share of actives <sup>1</sup>	Fitness (42.1%)	€96 on sports apparel	 57.1%	52.4% willing to pay premium
	7.6h/week time spent on sports		€69 on sports equipment	 42.9%	€14.40 average premium
<b>Hungary</b>	57.0% share of actives <sup>1</sup>	Running (38.4%)	€54 on sports apparel	 69.8%	56.7% willing to pay premium
	6.5h/week time spent on sports		€41 on sports equipment	 30.2%	€12.72 average premium
<b>Austria</b>	67.8% share of actives <sup>1</sup>	Fitness (49.9%)	€154 on sports apparel	 74.1%	63.1% willing to pay premium
	7.0h/week time spent on sports		€141 on sports equipment	 25.9%	€20.24 average premium
<b>Bulgaria</b>	59.6% share of actives <sup>1</sup>	Fitness (44.4%)	€96 on sports apparel	 70.7%	59.8% willing to pay premium
	8.9h/week time spent on sports		€72 on sports equipment	 29.3%	€14.68 average premium

 stationary  online

Notes: 1) Active = does sports on a regular basis.

2) If applicable, local currencies were converted into EUR using the average exchange rate as of 17 December 2019.

# Sports Business Group

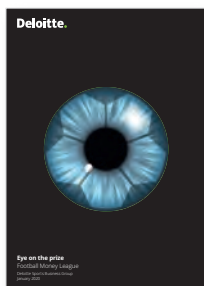
## Selected Services

Within our international network we offer a wide range of services, including:



## Selected Studies

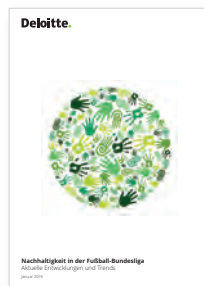
In order to further increase the level of transparency in the sports and leisure industry, Deloitte publishes market reports on a regular basis.



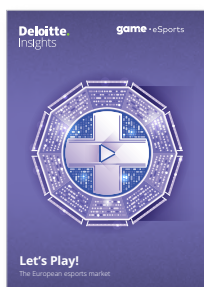
**Football Money League**  
(23<sup>rd</sup> edition)



**Annual Review of Football Finance**  
(28<sup>th</sup> edition)



**Sustainability in the German Bundesliga**  
(1<sup>st</sup> edition)



**Analysis of the German eSports-Market**  
(4<sup>th</sup> edition)



**European Health & Fitness Market Report 2020**  
(7<sup>th</sup> edition)

For over 20 years, Deloitte has been analyzing and consulting the sports and fitness industry.

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# Retail Practice

## Selected Services

Deloitte's Global Retail, Wholesale & Distribution team helps companies identify, understand and respond to changing trends, business models and opportunities in the rapidly evolving retail landscape. Our global, integrated team finds innovative solutions to solve complex retail challenges.

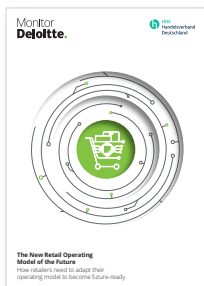
Today's retailers are confronted by savvy, smartphone-toting consumers and an uncertain economic future. Shifts in the supply chain require wholesale distributors to operate more efficiently. Our Deloitte network offers insights and tailored services to help global brands get closer to consumers and create winning strategies for the near future.



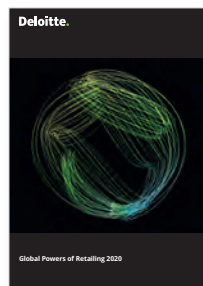
## Selected Studies

We strive to provide insights to our customers for them to always be well-informed in regard to critical trends. Deloitte publishes a range of reports on many relevant topics in the field of retail and consumer business.

We are keeping up with the latest developments in the areas of retail, wholesale and distribution and aim to be an innovative thought leader.



**The New Retail Operating Model of the Future**



**Global Powers of Retailing 2020**



**2020 retail industry outlook**

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# Survey design and sample

In December 2019, Deloitte surveyed consumers in Germany, France, Poland, Romania, the Czech Republic, Hungary, Austria and Bulgaria. A total of 6,028 individuals, aged between 18 and 65, participated in the survey. For each country, the distribution of respondents approximately corresponds to the gender, age and geographic distribution of the underlying population.

Among the respondents, 64.9% reported exercising on a regular basis in at least one type of sport. Throughout this report, these are referred to as “actives”, while the opposite group is referred to as “non-actives”. Overall, every country has a share of actives higher than 55.0%. Poland has the highest share (76.2%), followed by France (69.7%), Austria (67.8%) and Germany (64.8%).

Please note that figures in this study are rounded with either two, one or no decimal places depending on the context. Therefore, in some cases sums may display discrepancies.

Country	Total respondents	Level of activity		Gender		Age			
		Non-active	Active	Male	Female	18-34	35-44	45-54	55-65
Germany	1,208	35.2%	64.8%	49.0%	51.0%	22.5%	21.8%	25.5%	30.2%
France	1,201	30.3%	69.7%	48.4%	51.6%	34.6%	23.6%	23.1%	18.7%
Poland	600	23.8%	76.2%	49.7%	50.3%	40.3%	20.5%	18.2%	21.0%
Romania	601	36.3%	63.7%	50.4%	49.6%	37.9%	26.6%	20.6%	14.8%
Czech Republic	610	44.3%	55.7%	45.9%	54.1%	36.1%	21.0%	19.3%	23.6%
Hungary	604	43.0%	57.0%	47.5%	52.5%	37.9%	26.3%	16.9%	18.9%
Austria	603	32.2%	67.8%	48.8%	51.2%	34.2%	22.7%	23.9%	19.2%
Bulgaria	601	40.4%	59.6%	48.1%	51.9%	39.6%	25.6%	18.6%	16.1%



# Core results across countries

## Sports behaviour of actives<sup>1</sup>

Note: 1) Active = does sports on a regular basis.

### Demography of actives<sup>1</sup> by country

In Germany, France, Poland and the Czech Republic, there are no significant gender differences among actives. In Romania (55.6%), Bulgaria (57.0%), Austria (54.3%) and Hungary (59,6%) more males reported to be active than females. Across all countries surveyed, the age group 18-34 represents the largest share of actives. Except for Germany, at least 60% of all actives are younger than 45 years across all countries.

Country	Actives	Gender		Age			
		Male	Female	18-34	35-44	45-54	55-65
Germany	64.8%	49.6%	50.4%	27.2%	24.4%	25.8%	22.6%
France	69.7%	51.5%	48.5%	39.9%	23.9%	19.6%	16.6%
Poland	76.2%	51.0%	49.0%	46.0%	24.3%	15.3%	14.4%
Romania	63.7%	55.6%	44.4%	43.9%	25.1%	18.5%	12.5%
Czech Republic	55.7%	50.0%	50.0%	40.9%	24.7%	17.9%	16.5%
Hungary	57.0%	53.8%	46.2%	40.7%	27.9%	17.7%	13.7%
Austria	67.8%	54.3%	45.7%	39.9%	22.5%	20.3%	17.4%
Bulgaria	59.6%	57.0%	43.0%	45.3%	26.8%	18.7%	9.2%

Note: 1) Active = does sports on a regular basis.

### Most popular sports<sup>1</sup> and average time spent on sports

Across all countries, the top sports comprise running, fitness, swimming, hiking/walking and football. Notably, in five of the eight countries surveyed, running, fitness and swimming represent the top three sports practiced by actives. Actives spend on average between 5.8 (France) and 8.9 hours (Bulgaria) per week on sports, with an average of 7.1 hours per week across all countries surveyed.

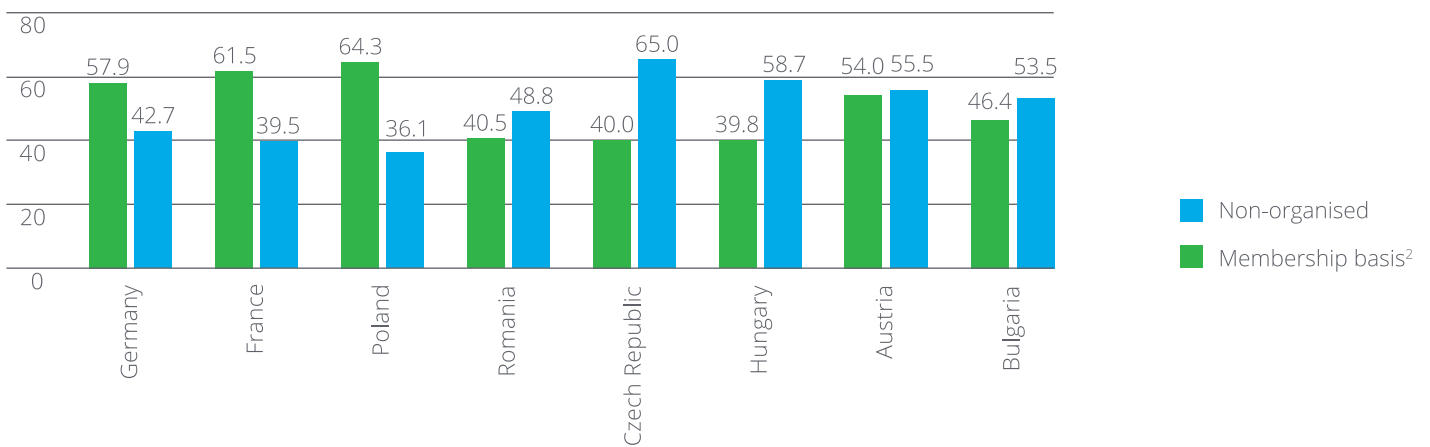
Country	Hours per week	Most popular sport   percentage					
		1 <sup>st</sup>		2 <sup>nd</sup>		3 <sup>rd</sup>	
<b>Germany</b>	6.1	Fitness	42.4%	Running	38.2%	Swimming	28.6%
<b>France</b>	5.8	Running	29.2%	Fitness	27.6%	Swimming	23.4%
<b>Poland</b>	8.6	Running	58.9%	Fitness	48.4%	Swimming	38.9%
<b>Romania</b>	8.2	Running	44.9%	Football	35.8%	Hiking/Walking	33.2%
<b>Czech Republic</b>	7.6	Fitness	42.1%	Hiking/Walking	41.5%	Swimming	37.6%
<b>Hungary</b>	6.5	Running	38.4%	Fitness	30.8%	Swimming	20.6%
<b>Austria</b>	7.0	Fitness	49.9%	Swimming	44.0%	Running	42.8%
<b>Bulgaria</b>	8.9	Fitness	44.4%	Running	40.2%	Football	26.5%

Note: 1) Multiple answers possible.

### Organisation of sports activity<sup>1</sup>

In five out of the eight countries surveyed, non-organised sports (i.e. at home or outdoors) are more popular than organised/membership based sports<sup>2</sup>. This is particularly the case in the Czech Republic (+25.0 percentage points) and Hungary (+18.9 percentage points). In Poland, Germany and France, an organised/membership setting is of larger importance among the actives surveyed.

Percent of actives



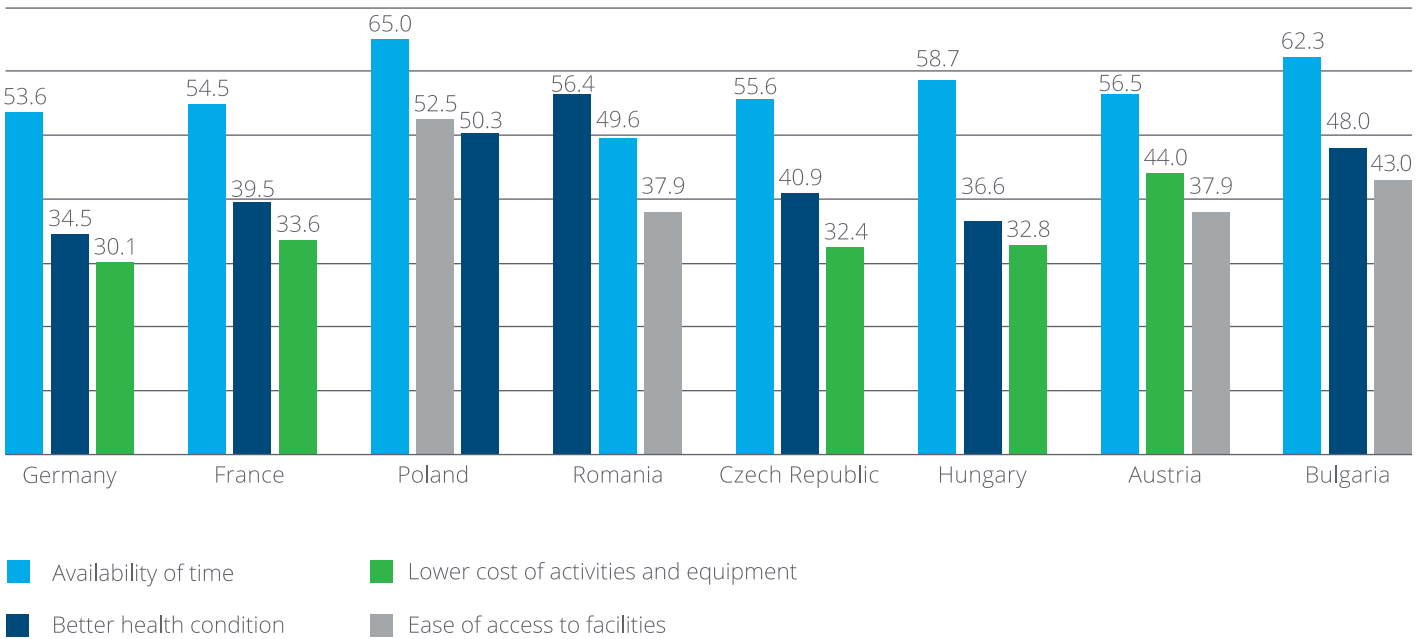
Notes: 1) Multiple answers possible.

2) Membership basis = fitness clubs, sports associations or intermediaries.

### Reasons to do more sports<sup>1</sup>

The main reason to increase the amount of sporting activities given by respondents in all countries, would be the availability of time, except Romania, where a better health condition is the primary incentive. Other reasons are a lower cost of activities and equipment as well as ease of access to sports facilities.

Percent of actives



Note: 1) Multiple answers possible.

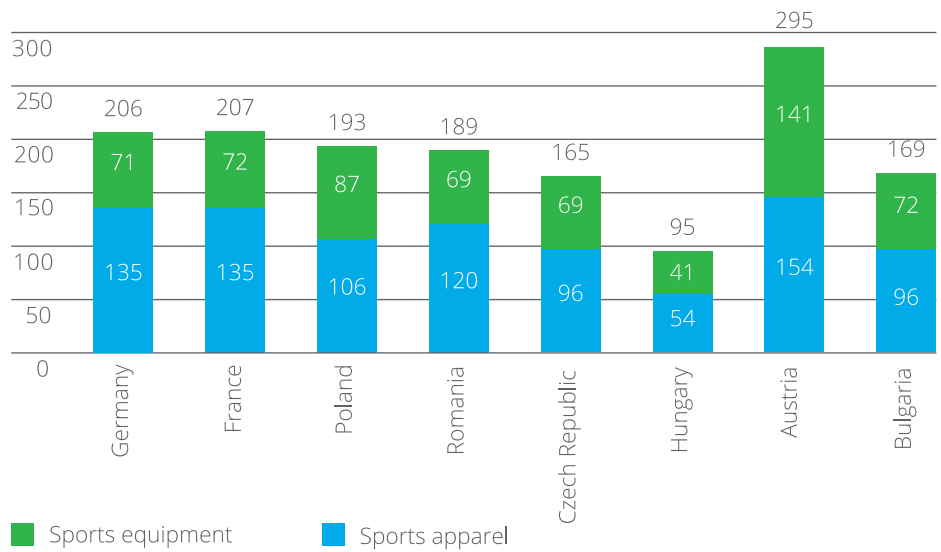
# Core results across countries

## Sports consumption of actives<sup>1</sup>

### Expenditure on sports apparel and equipment<sup>1,2</sup>

Across all countries surveyed, respondents spend on average between €95 (Hungary) and €295 (Austria) per year on sports apparel and equipment. Actives in Germany and France spend only about half as much on sports equipment as on apparel (expenditure on equipment/apparel = 53.1% and 53.0%, respectively), while actives in Austria spend on average almost as much on sports equipment as on sports apparel (91.8%).

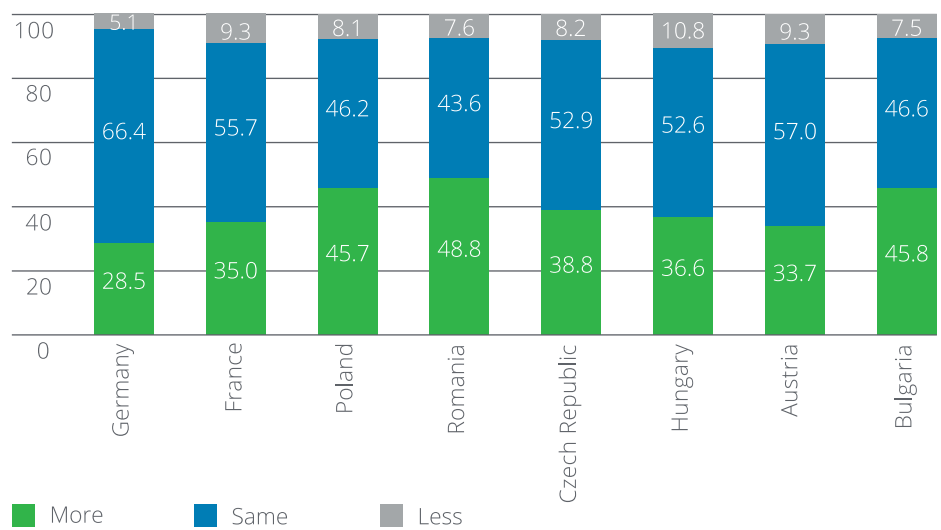
Expenditure on sports apparel and equipment of actives (€)



### Expected change in total sports-related expenditure next year vs. current year<sup>3</sup>

While the largest share of actives in Romania expects an increase in their total sports-related expenditure in future, the largest share of actives in all other countries anticipates no change at all. Only between 5.1% and 10.8% intend to reduce their sports-related expenditure.

Percent of actives

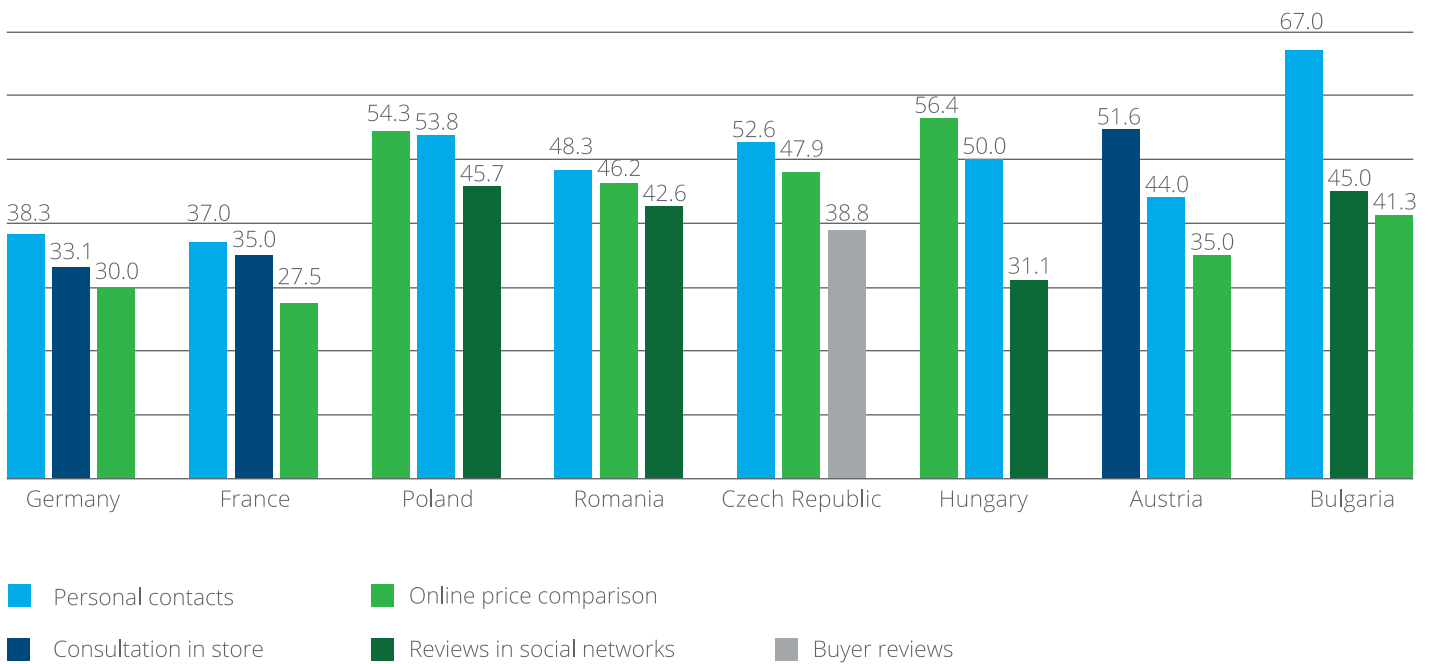


Notes: 1) If applicable, local currencies were converted into EUR using the average exchange rate as of 17 December 2019.  
 2) Please note the survey results do not account for differences in local price levels.  
 3) More = answer choices significantly more and rather more; less = answer choices significantly less and rather less.

### Sources for purchase-relevant information<sup>1</sup>

While personal touchpoints (e.g. personal contacts and in-store consultation) rank highest as information sources in Germany, France, the Czech Republic, Romania, Austria and Bulgaria, online touchpoints (e.g. online price comparisons, reviews in social media and buyer reviews) are among the top three sources for purchase-relevant information in all countries surveyed.

#### Percent of actives



Note: 1) Multiple answers possible.



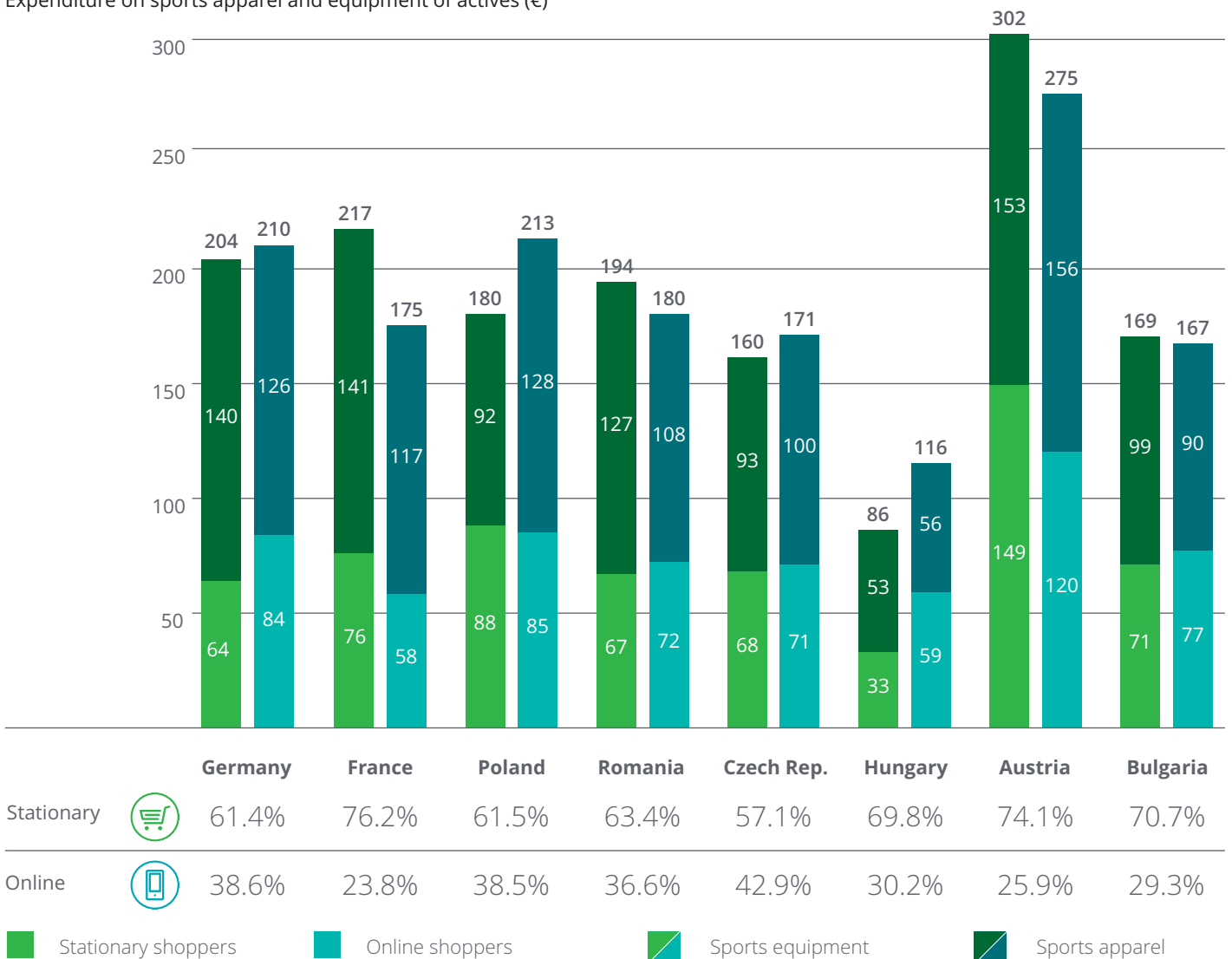
**Channel distribution:  
online vs. stationary<sup>1,2</sup>**

In all countries surveyed, the majority of actives purchase their sporting goods primarily in brick and mortar stores ("Stationary shoppers").

In France, Austria and Bulgaria, the shares of Stationary shoppers are above 70%, while "Online shoppers", on the other hand, are most prevalent in the Czech Republic (42.9%) and Germany (38.6%).

In four of the eight countries surveyed, the average spending of Online shoppers on sports apparel and equipment is higher than that of Stationary shoppers.<sup>1,2</sup>

Expenditure on sports apparel and equipment of actives (€)

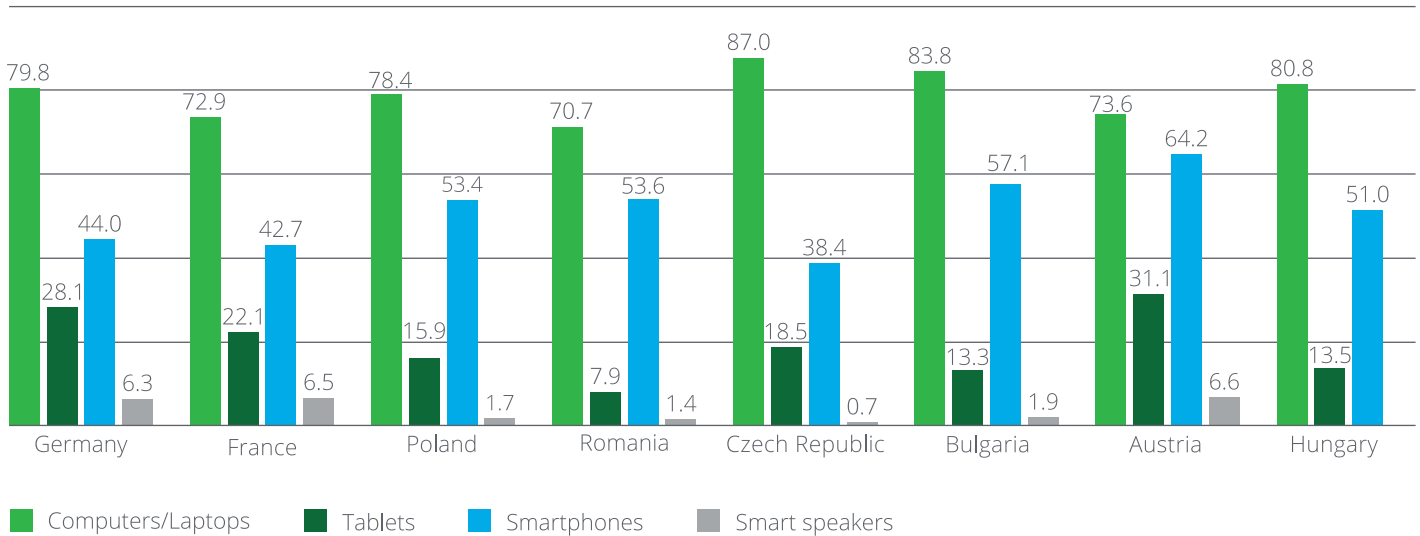


Notes: 1) If applicable, local currencies were converted into EUR using the average exchange rate as of 17 December 2019.  
2) Please note the survey results do not account for differences in local price levels.

### Devices used by Online shoppers<sup>1</sup>

In all countries surveyed, computers/laptops represent the primary device of choice for online purchases of sporting goods, followed by smartphones and tablets. Smart Speakers only represent a relevant purchase device in Germany, France and Austria.

Percent of actives



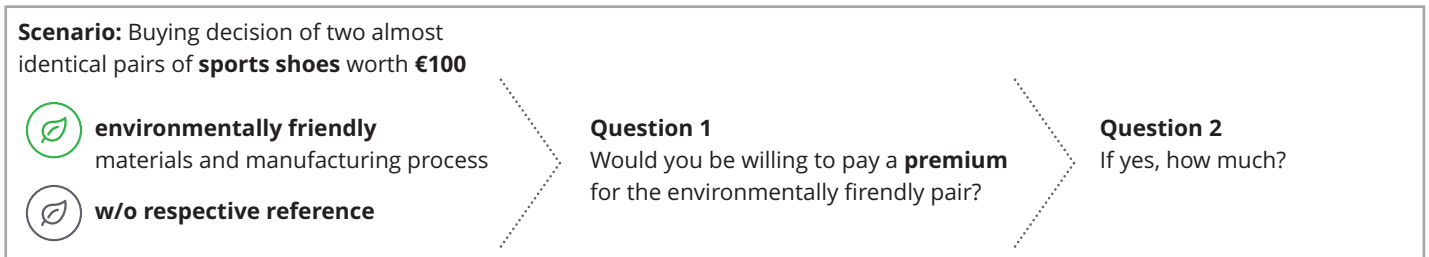
Note: 1) Multiple answers possible.

**Sustainability as decision criterion<sup>1,2</sup>**

We asked respondents to imagine purchasing new sports shoes worth €100. They were given the choice between two almost identical pairs (in terms of brand, design, fit, etc.).

Pair 1 only differed from Pair 2 by the environmentally friendly materials and manufacturing process used. Respondents were then asked how much of a premium they were willing to pay for the more environmentally sustainable Pair 1.

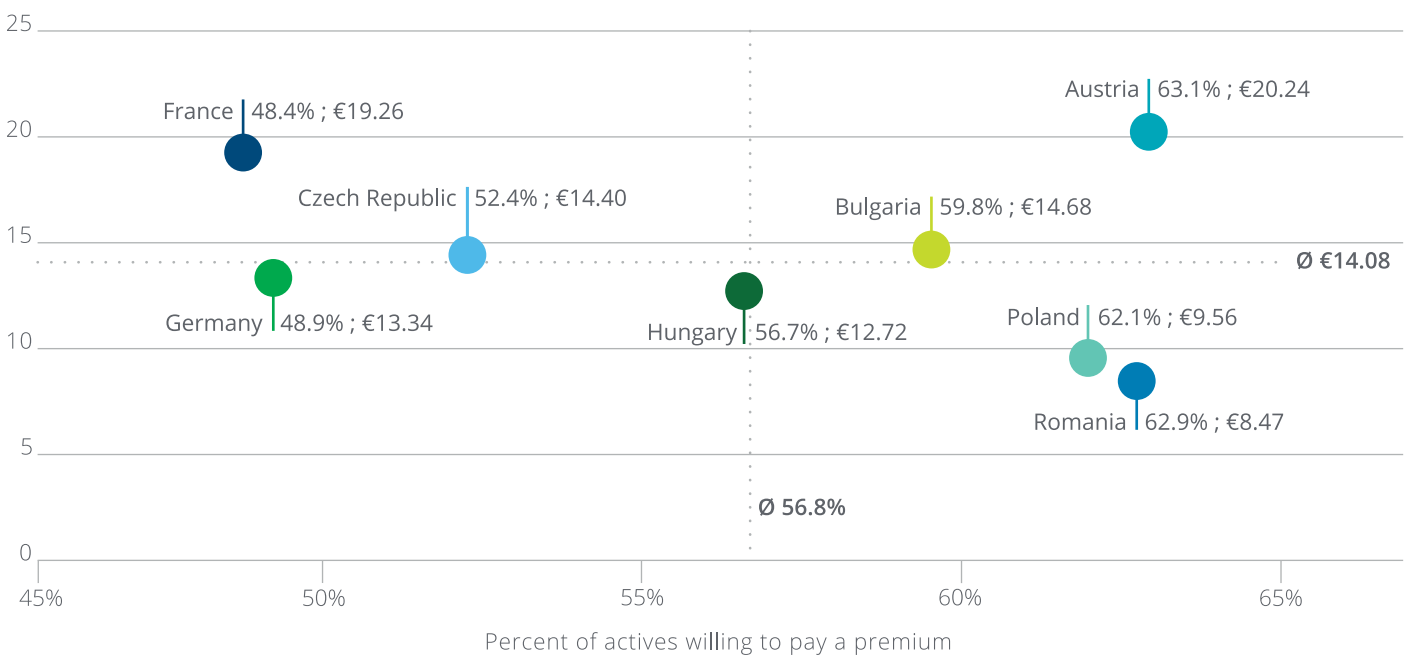
Across all countries surveyed, environmentally friendly materials and manufacturing processes have the potential to influence shopping decisions for sporting goods.



Overall, actives in Austria show the highest percentage willing to pay a premium (63.1%) while also willing to pay the highest premium on average (€20.24).

At the other end, in Germany (48.9%) and France (48.4%) the lowest share of actives reported willingness to pay a premium among the eight countries surveyed.<sup>2</sup>

**Average premium (€)<sup>1</sup>**



Notes: 1) If applicable, local currencies were converted into EUR using the average exchange rate as of 17 December 2019.  
2) Please note the survey results do not account for differences in local price levels.

# Core results across countries

## Sports behaviour and consumption of non-actives<sup>1</sup>

Note: 1) Non-active = does not do sports on a regular basis.

### Demography of non-actives<sup>1</sup> by country

Across all countries surveyed, more women reported not practicing sports on a regular basis (non-actives) than men. The age group 55-65 represents a comparatively large share of non-actives, particularly in Germany (44.2%) and Poland (42.0%).

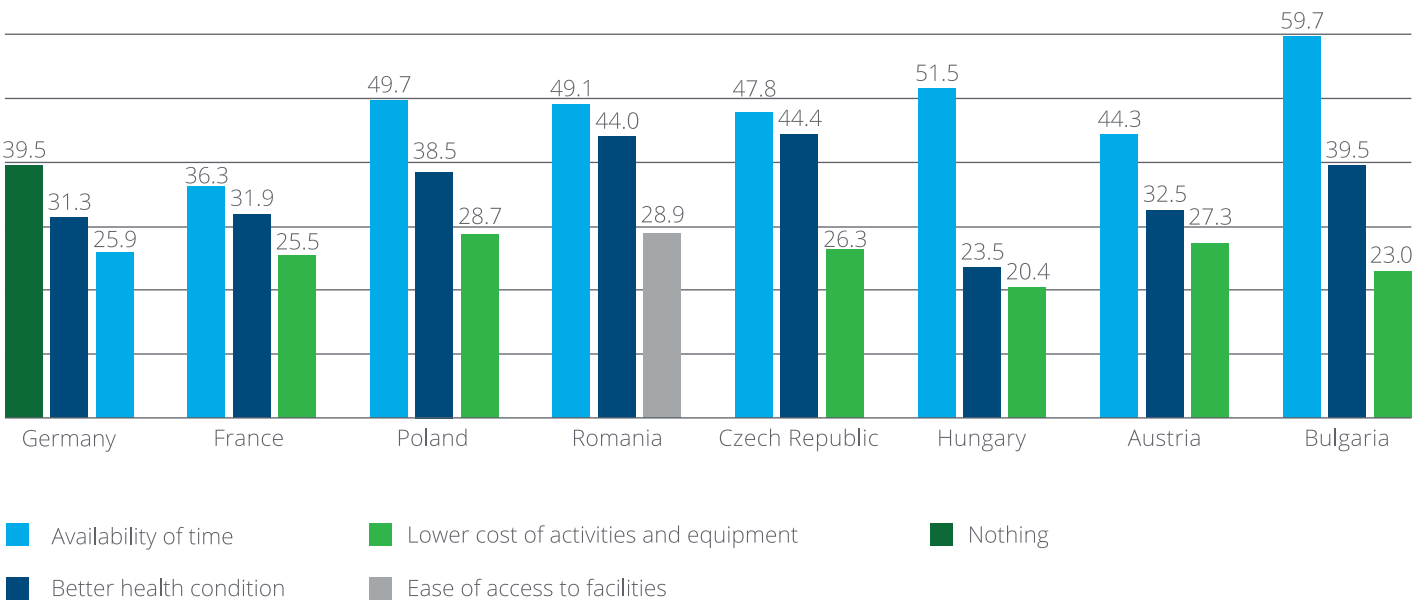
Country	Non-actives	Gender		Age			
		Male	Female	18-34	35-44	45-54	55-65
Germany	35.2%	48.0%	52.0%	13.9%	16.9%	24.9%	44.2%
France	30.3%	41.2%	58.8%	22.3%	23.1%	31.0%	23.6%
Poland	23.8%	45.5%	54.5%	22.4%	8.4%	27.3%	42.0%
Romania	36.3%	41.3%	58.7%	27.5%	29.4%	24.3%	18.8%
Czech Republic	44.3%	40.7%	59.3%	30.0%	16.3%	21.1%	32.6%
Hungary	43.0%	39.2%	60.8%	34.2%	24.2%	15.8%	25.8%
Austria	32.2%	37.1%	62.9%	22.2%	23.2%	31.4%	23.2%
Bulgaria	40.4%	35.0%	65.0%	31.3%	23.9%	18.5%	26.3%

Note: 1) Non-active = does not do sports on a regular basis.

### Reasons to do (more) sports<sup>1</sup>

Similar to actives, the availability of time, better health and lower costs of activities and equipment are the top three incentives for non-actives to start or increase their sporting activities. However, 39.5% of non-actives in Germany indicated that nothing would incentivise them to do sports while this response was not among the top 3 in any of the other countries considered.

Percent of non-actives



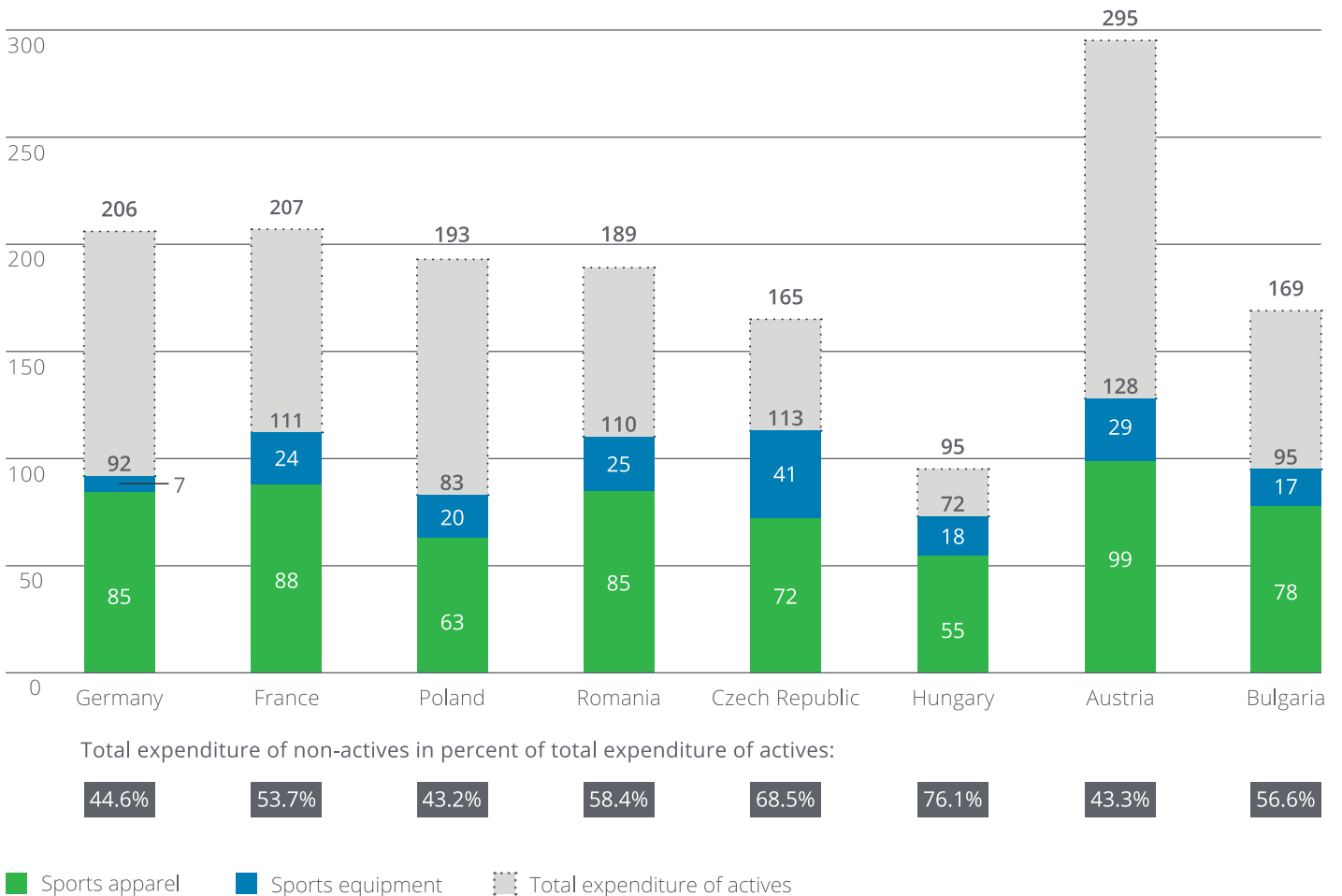
Note: 1) Multiple answers possible.

### Expenditure on sports apparel and equipment<sup>1,2,3</sup>

Despite not practicing sports on a regular basis, 41.7% of non-actives reported expenditure on sports, especially on sports apparel. Like their active counterparts, Austrian non-actives spend the most on sports apparel and equipment among those surveyed.

On average across all countries, the expenditure of non-actives amounts to 55.6% of the amount spent by actives. However, the expenditure for sports equipment relative to apparel (29.7%) is much lower than that of the actives (70.0%).

Expenditure on sports apparel and equipment of non-actives compared to actives (€)



Notes: 1) If applicable, local currencies were converted into EUR using the average exchange rate as of 17 December 2019.  
 2) Please note the survey results do not account for differences in local price levels.  
 3) Averages calculated based on non-actives who indicated having at least some expenditure on sports-related goods within the last year.

# Country profiles



# Germany

## Most popular sports

Fitness is the most popular sport practiced by actives in Germany, followed by running and swimming. On average, actives in Germany spend 6.1 hours per week on sports.

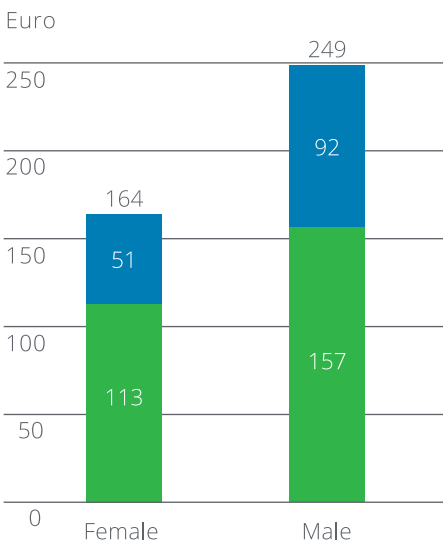
1	Fitness (42.4%)
2	Running (38.2%)
3	Swimming (28.6%)
4	Hiking/Walking (21.3%)
5	Football (19.5%)

## Expenditure on sports apparel and equipment

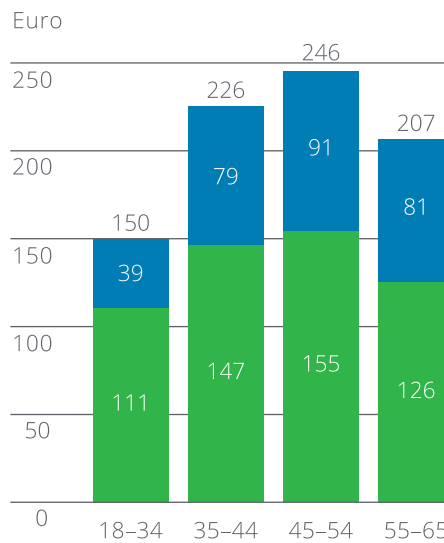
On average, actives in Germany spend €206 p.a. on sports apparel and equipment. Active males in Germany report higher expenditure on sports apparel and equipment than active females (€249 and €164, respectively). Expenditure on sports apparel and equipment is highest for the age group 45-54 and lowest for the age group 18-34.

Individuals with a net household income above €3,000 per month spend more than four times the amount on sports apparel and equipment than individuals with a net household income below €1,000. Expenditure on sports apparel and equipment can therefore be described as income-elastic.

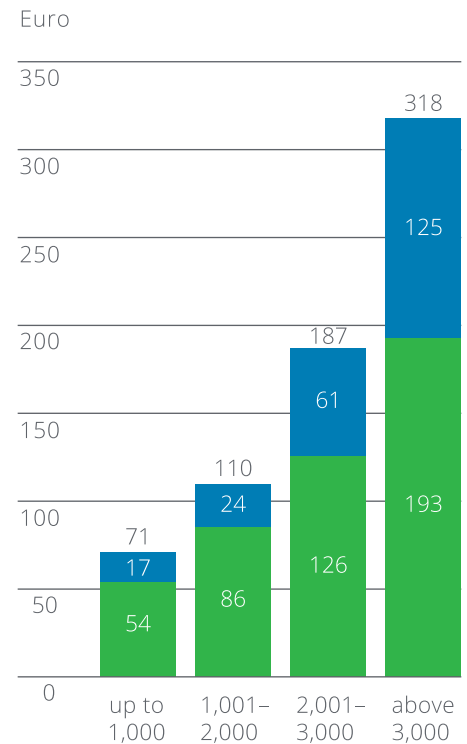
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



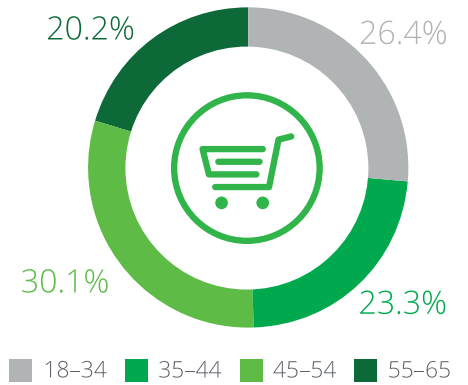
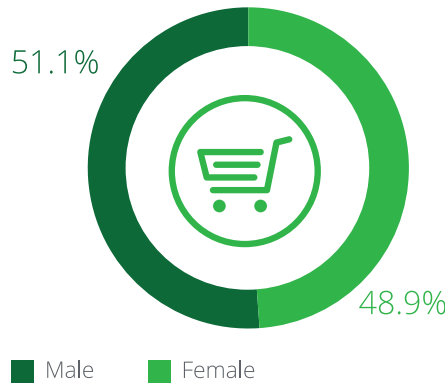
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in Germany prefer to shop their sporting goods in stationary stores (61.4%). On average, Stationary shoppers spend €203 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 45 and 54 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Possibility to try on/out (1.8)
2	Large assortment (2.0)
3	Price (2.0)

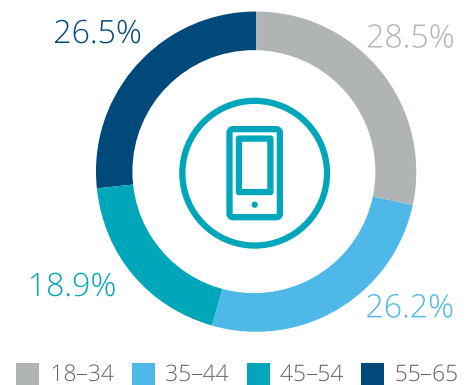
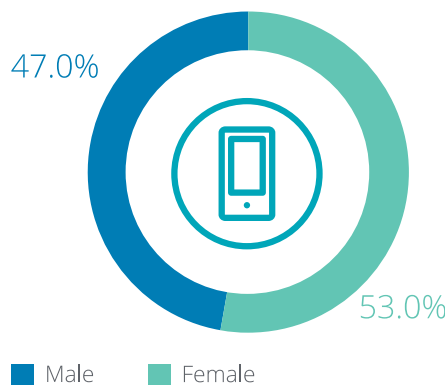
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (38.0%)
2	Special offers (32.8%)
3	Simple & free returns (31.6%)

### Online shoppers

38.6% of actives in Germany prefer to shop their sporting goods online. On average, Online shoppers spend €210 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be female, with the largest group of Online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Convenient ordering & home delivery (1.8)
2	Price (1.8)
3	Payment options (2.0)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (47.0%)
2	Proximity/accessibility (42.7%)
3	Special offers (41.1%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# France

## Most popular sports

Running is the most popular sport practiced by actives in France, followed by fitness and swimming. On average, actives in France spend 5.8 hours per week on sports.

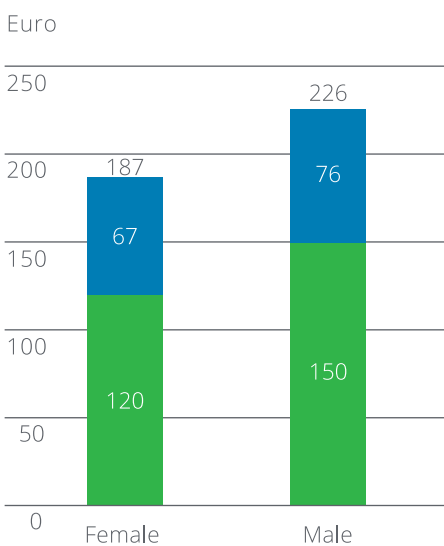
1	Running (29.2%)
2	Fitness (27.6%)
3	Swimming (23.4%)
4	Football (20.9%)
5	Hiking/Walking (19.2%)

## Expenditure on sports apparel and equipment

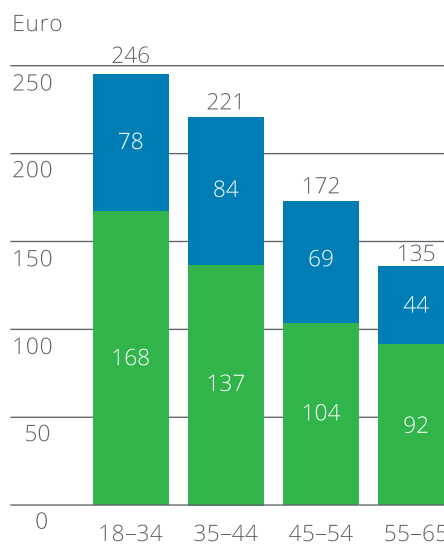
On average, actives in France spend €207 p.a. on sports apparel and equipment. Active males in France report higher expenditure on sports apparel and equipment than active females (€226 and €187, respectively). Expenditure on sports apparel and equipment is highest for the age group 18-34 and lowest for the age group 55-65.

Individuals with a net household income above €3,000 per month spend more than double the amount on sports apparel and equipment than individuals with a net household income below €1,000. Expenditure on sports apparel and equipment can therefore be described as income-elastic.

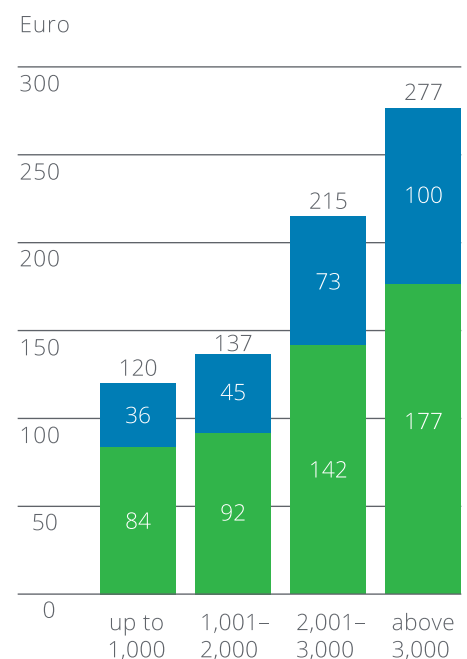
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



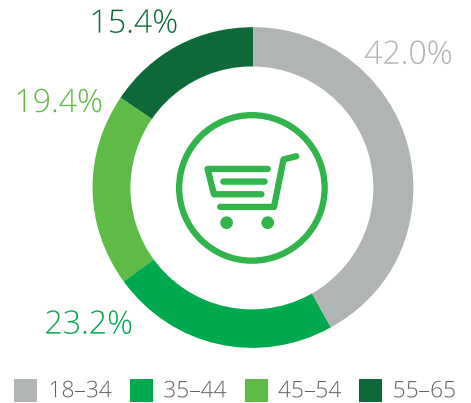
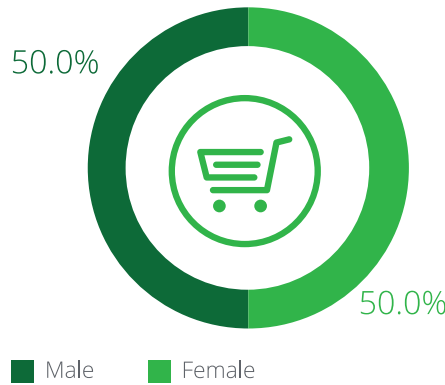
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in France prefer to shop their sporting goods in stationary stores (76.2%). On average, Stationary shoppers spend €217 p.a. on sports apparel and equipment. They are equally distributed in gender, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Price (1.8)
2	Large assortment (1.9)
3	Possibility to try on/out (2.0)

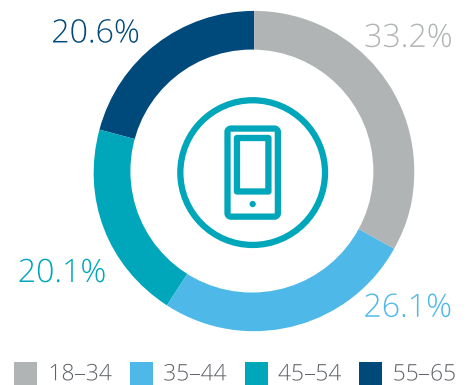
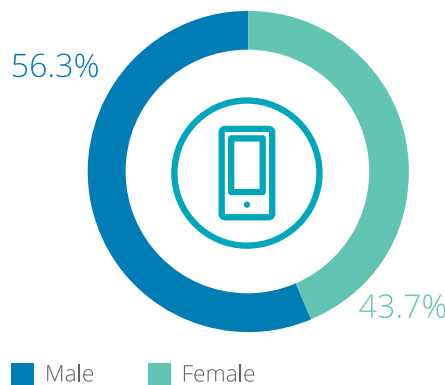
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (51.9%)
2	Simple & free returns (43.1%)
3	Special offers (36.2%)

### Online shoppers

23.8% of actives in France prefer to shop their sporting goods online. On average, Online shoppers spend €175 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be male, with the largest group of Online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Price (1.8)
2	Large assortment (1.8)
3	Simple and free returns (2.0)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (56.3%)
2	Proximity/accessibility (37.2%)
3	Large assortment (35.7%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# Poland

## Most popular sports

Running is the most popular sport practiced by actives in Poland, followed by fitness and swimming. On average, actives in Poland spend 8.6 hours per week on sports.

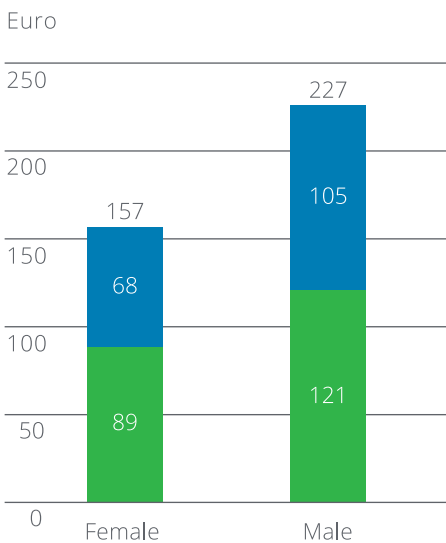
1	Running (58.9%)
2	Fitness (48.4%)
3	Swimming (38.9%)
4	Football (32.8%)
5	Volleyball (24.3%)

## Expenditure on sports apparel and equipment

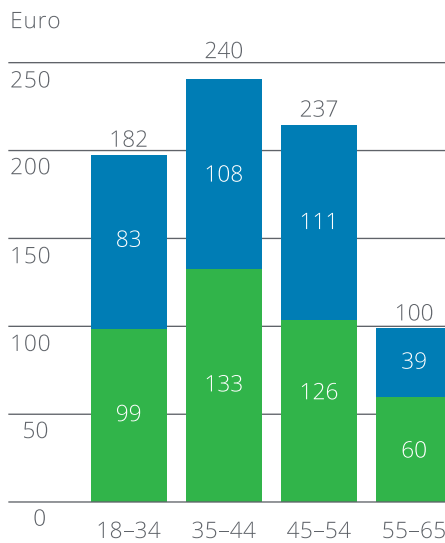
On average, actives in Poland spend €193 p.a. on sports apparel and equipment. Active males in Poland report higher expenditure on sports apparel and equipment than active females (€227 and €157, respectively). Expenditure on sports apparel and equipment is highest for the age group 35-44 and lowest for the age group 55-65.

Individuals with a net household income between €2,000 and €3,000 per month spend the highest amount on sports apparel and equipment, while individuals with a net household income below €1,000 spend the least.

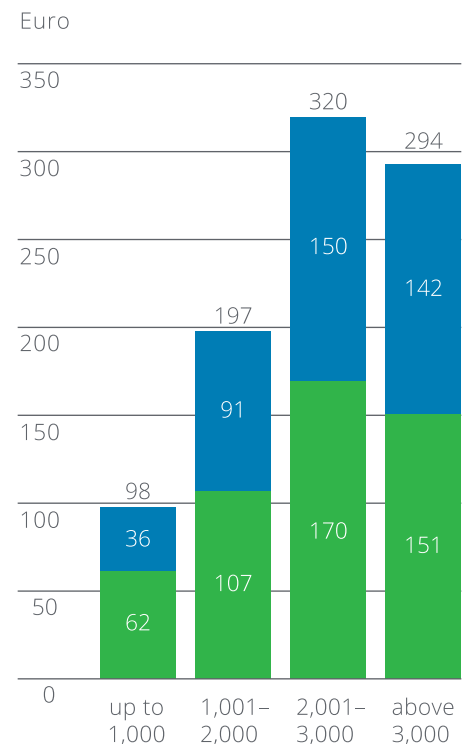
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



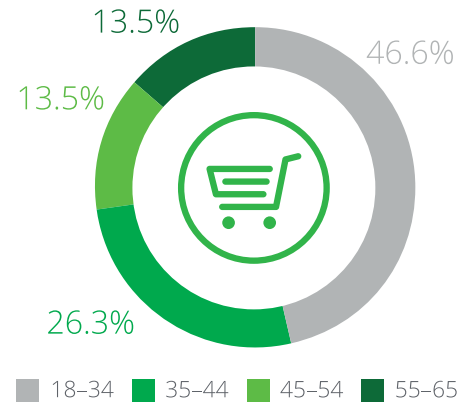
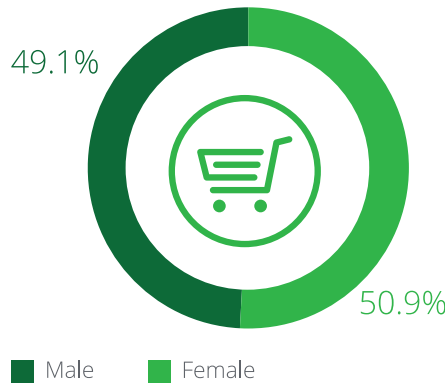
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

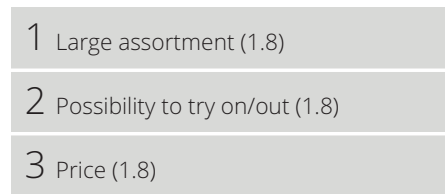
### Stationary shoppers

The majority of actives in Poland prefer to shop their sporting goods in stationary stores (61.5%). On average, Stationary shoppers spend €180 p.a. on sports apparel and equipment. They are slightly more likely to be female, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>



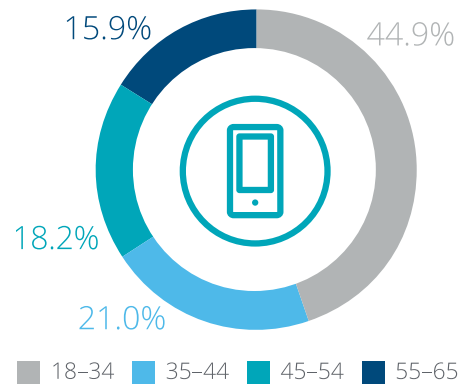
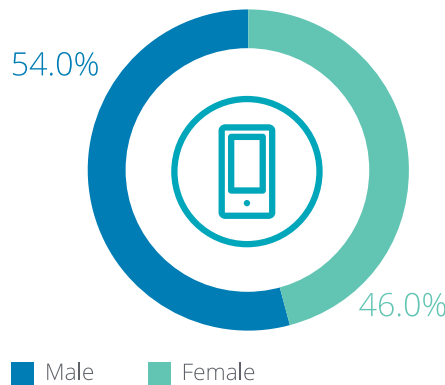
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>



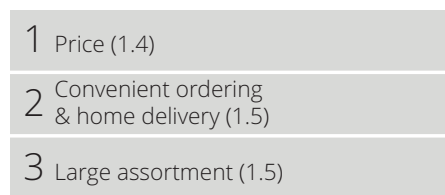
### Online shoppers

38.5% of actives in Poland prefer to shop their sporting goods online. On average, Online shoppers spend €213 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be male, with the largest group of Online shoppers between 18 and 34 years old.

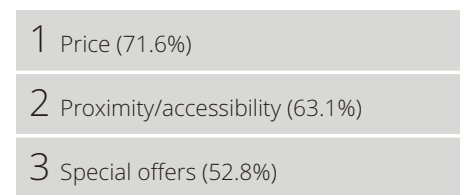
Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>



Switching reasons for Online shoppers to stationary shopping<sup>2</sup>



Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# Romania

## Most popular sports

Running is the most popular sport practiced by actives in Romania, followed by football and hiking/walking. On average, actives in Romania spend 8.2 hours per week on sports.

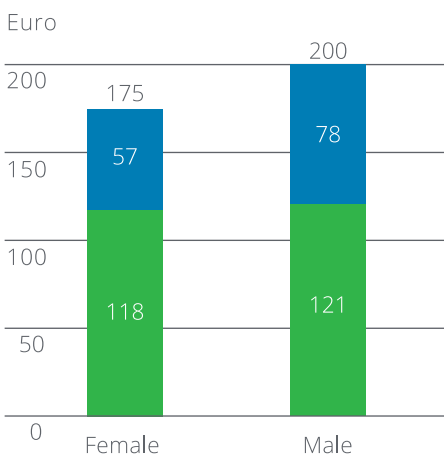
1	Running (44.9%)
2	Football (35.8%)
3	Hiking/Walking (33.2%)
4	Fitness (32.9%)
5	Swimming (26.9%)

## Expenditure on sports apparel and equipment

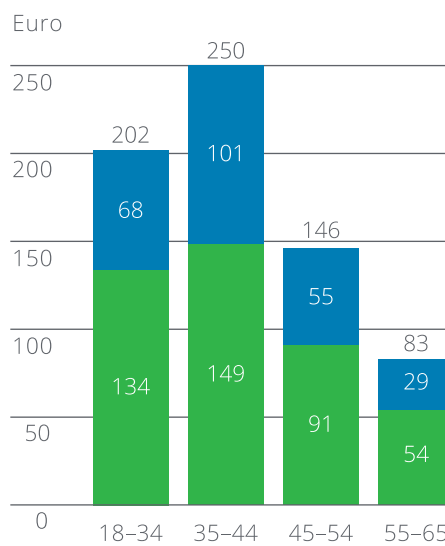
On average, actives in Romania spend €189 p.a. on sports apparel and equipment. Active males in Romania report higher expenditure on sports apparel and equipment than active females (€200 and €175, respectively). Expenditure on sports apparel and equipment is highest for the age group 35-44 and lowest for the age group 55-65.

Individuals with a net household income above €3,000 per month spend more than double the amount on sports apparel and equipment than individuals with a net household income below €1,000. Expenditure on sports apparel and equipment can therefore be described as income-elastic.

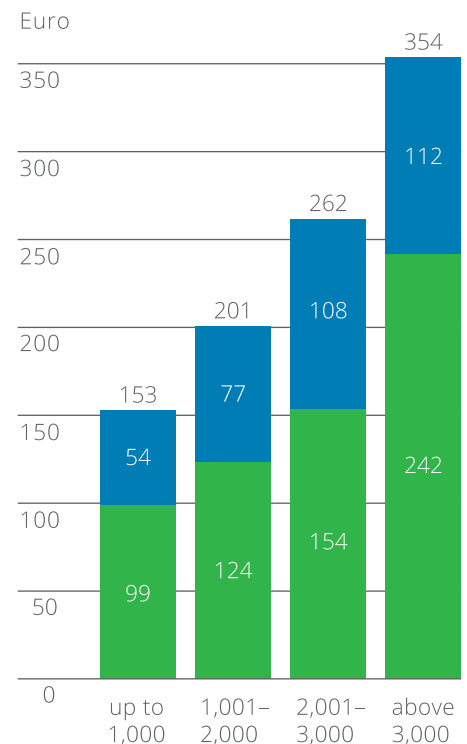
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



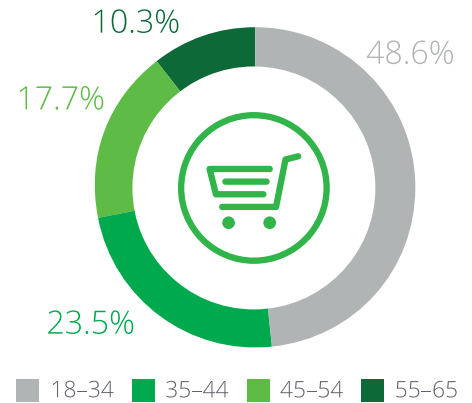
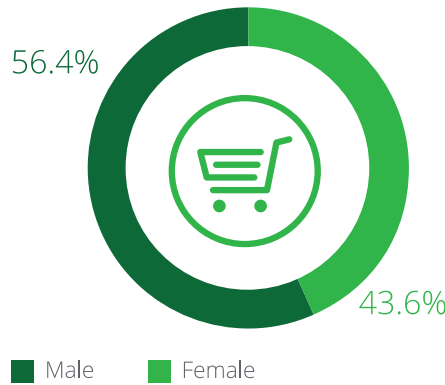
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in Romania prefer to shop their sporting goods in stationary stores (63.4%). On average, Stationary shoppers spend €194 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Large assortment (1.6)
2	Price (1.7)
3	Possibility to try on/out (1.8)

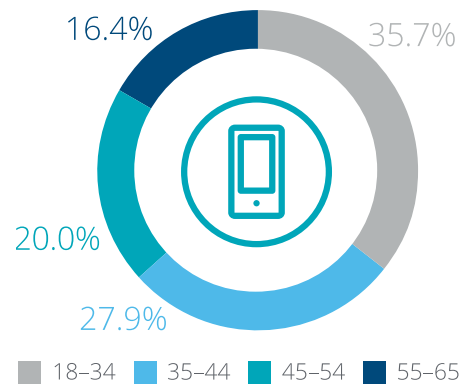
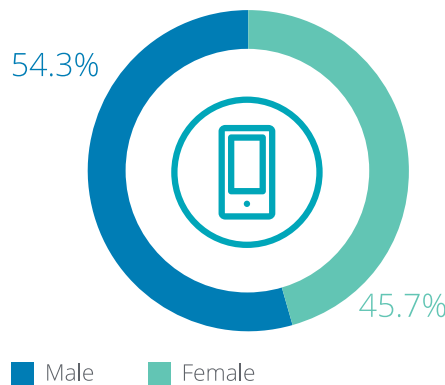
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (61.7%)
2	Special offers (52.7%)
3	Simple & free returns (49.8%)

### Online shoppers

36.6% of actives in Romania prefer to shop their sporting goods online. On average, Online shoppers spend €180 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be male, with the largest group of Online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Price (1.6)
2	Transparency in price comparisons (1.7)
3	Large assortment (1.8)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (62.9%)
2	Special offers (60.0%)
3	Possibility to try on/out (47.9%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.



# Czech Republic

## Most popular sports

Fitness is the most popular sport practiced by actives in the Czech Republic, followed by hiking/walking and swimming. On average, actives in the Czech Republic spend 7.6 hours per week on sports.

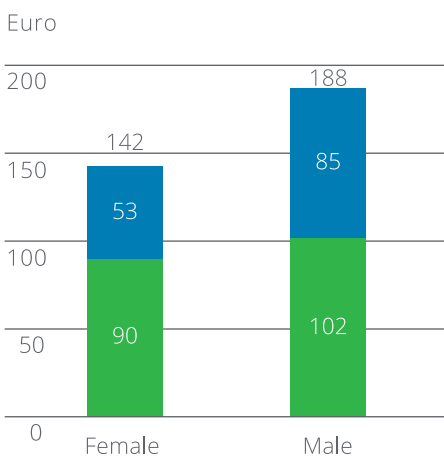
1	Fitness (42.1%)
2	Hiking/Walking (41.5%)
3	Swimming (37.6%)
4	Running (34.7%)
5	Mountainbiking (28.2%)

## Expenditure on sports apparel and equipment

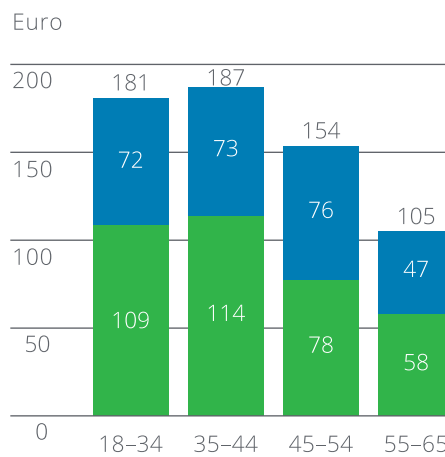
On average, actives in the Czech Republic spend €165 p.a. on sports apparel and equipment. Active males in the Czech Republic report higher expenditure on sports apparel and equipment than active females (€188 and €142, respectively). Expenditure on sports apparel and equipment is highest for the age group 35-44 and lowest for the age group 55-65.

Individuals with a net household income above €3,000 per month spend the highest amount on sports apparel and equipment, while individuals with a net household income below €1,000 spend the lowest. Expenditure on sports apparel and equipment can therefore be described as income-elastic.

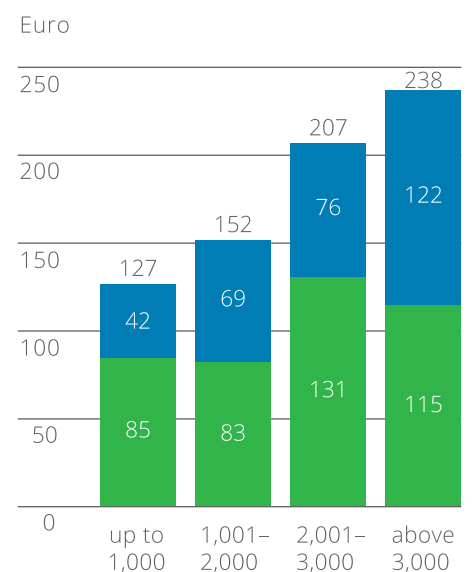
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



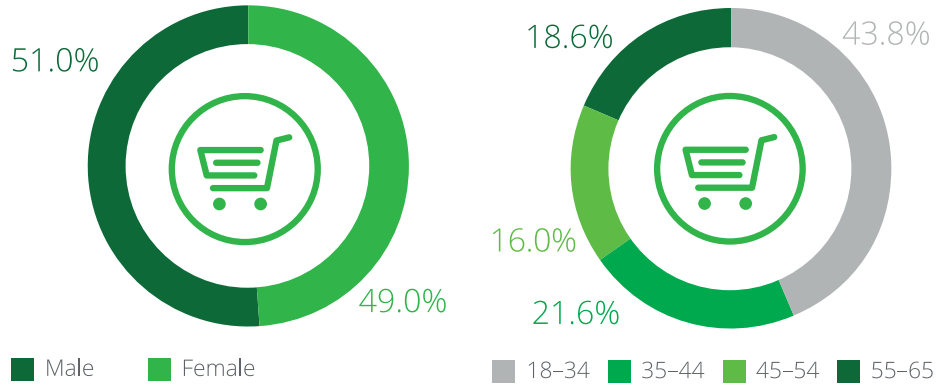
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in the Czech Republic prefer to shop their sporting goods in stationary stores (57.1%). On average, Stationary shoppers spend €160 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Possibility to try on/out (1.8)
2	Price (1.8)
3	Return options (2.0)

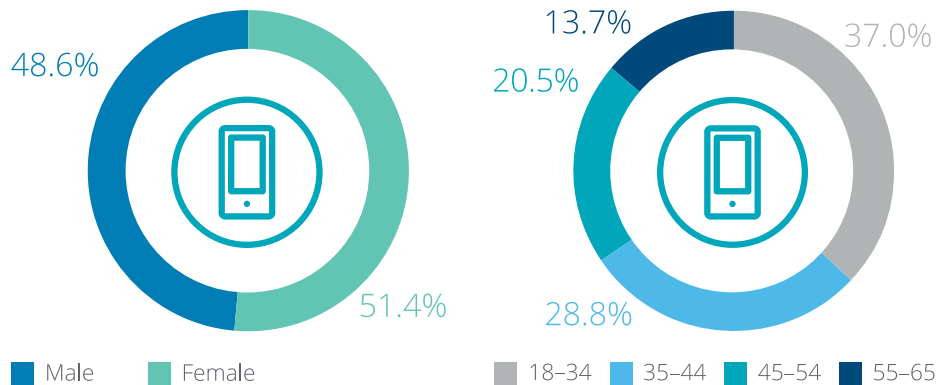
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (65.5%)
2	Special offers (46.9%)
3	Simple & free returns (43.8%)

### Online shoppers

42.9% of actives in the Czech Republic prefer to shop their sporting goods online. On average, Online shoppers spend €171 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be female, with the largest group of Online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Price (1.7)
2	Simple & free returns (1.9)
3	Convenient ordering & home delivery (1.9)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (60.3%)
2	Proximity/accessibility (48.6%)
3	Special offers (46.6%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# Hungary

## Most popular sports

Running is the most popular sport practiced by actives in Hungary, followed by fitness and swimming. On average, actives in Hungary spend 6.5 hours per week on sports.

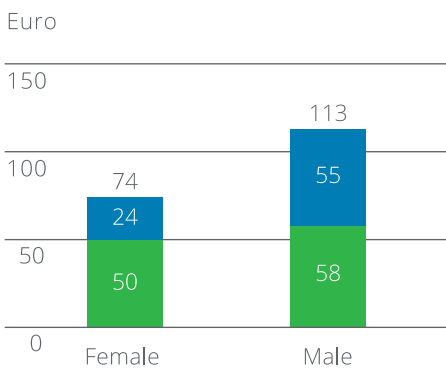
1	Running (38.4%)
2	Fitness (30.8%)
3	Swimming (20.6%)
4	Hiking/Walking (20.1%)
5	Gymnastics (16.0%)

## Expenditure on sports apparel and equipment

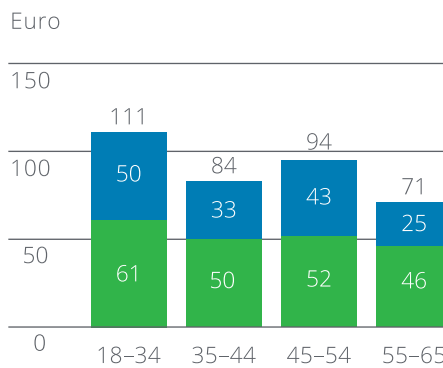
On average, actives in Hungary spend €95 p.a. on sports apparel and equipment. Active males in Hungary report higher expenditure on sports apparel and equipment than active females (€113 and €74, respectively). Expenditure on sports apparel and equipment is highest for the age group 18-34 and lowest for the age group 55-65.

Individuals with a net household income between €2,000 and €3,000 per month spend the most amount on sports apparel and equipment, while individuals with a net household income below €1,000 spend the least.

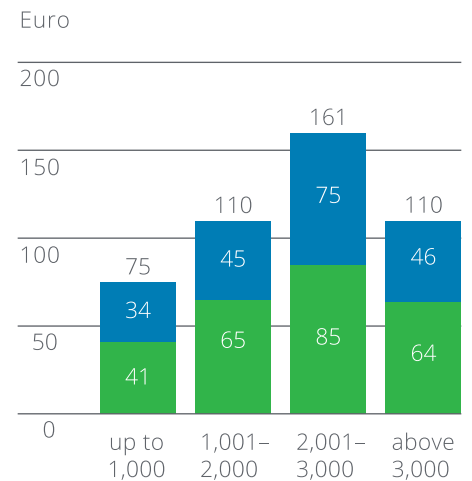
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



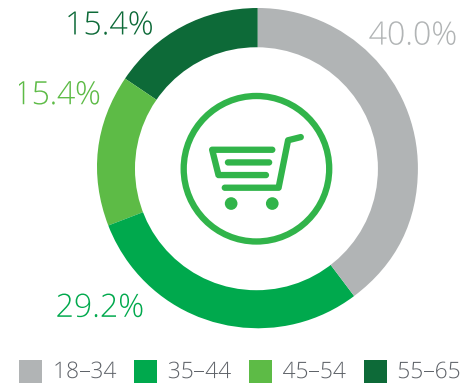
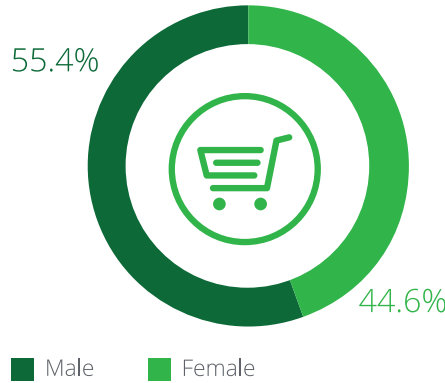
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in Hungary prefer to shop their sporting goods in stationary stores (69.8%). On average, Stationary shoppers spend €86 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Price (1.7)
2	Large assortment (1.8)
3	Transparency in price comparisons (2.0)

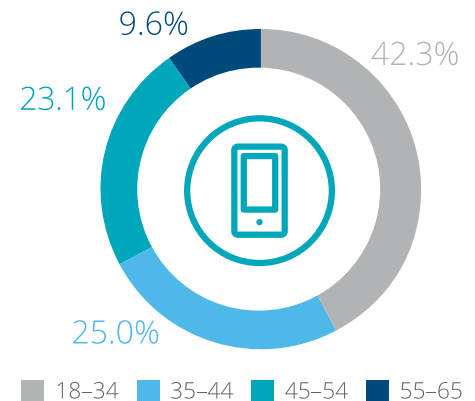
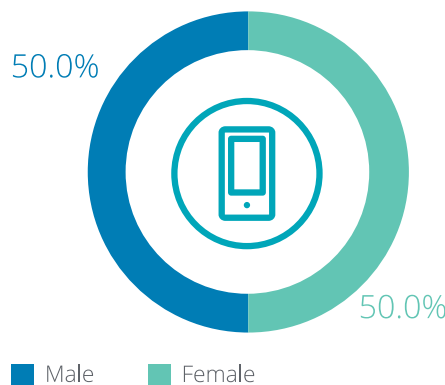
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (63.8%)
2	Simple & free returns (47.1%)
3	Convenient ordering & home delivery (41.7%)

### Online shoppers

30.2% of actives in Hungary prefer to shop their sporting goods online. On average, Online shoppers spend €116 p.a. on sports apparel and equipment. Online shoppers are equally distributed in gender, with the largest group of online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Price (1.5)
2	Large assortment (1.6)
3	Convenient ordering & home delivery (1.6)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (56.7%)
2	Proximity/accessibility (54.8%)
3	Large assortment (34.6%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# Austria

## Most popular sports

Fitness is the most popular sport practiced by actives in Austria, followed by swimming and running. On average, actives in Austria spend 7.0 hours per week on sports.

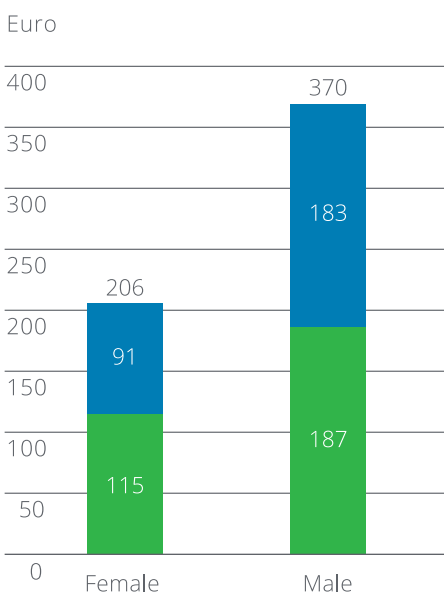
1	Fitness (49.9%)
2	Swimming (44.0%)
3	Running (42.8%)
4	Hiking/Walking (38.4%)
5	Alpine skiing (29.3%)

## Expenditure on sports apparel and equipment

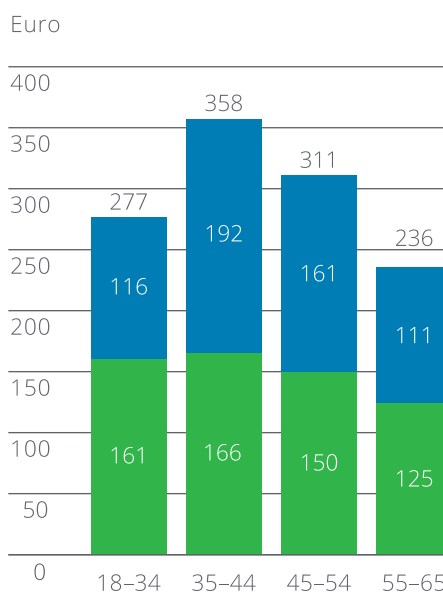
On average, actives in Austria spend €295 p.a. on sports apparel and equipment. Active males in Austria report higher expenditure on sports apparel and equipment than active females (€370 and €206, respectively). Expenditure on sports apparel and equipment is highest for the age group 35-44 and lowest for the age group 55-65.

Individuals with a net household income above €3,000 per month spend more than three times the amount on sports apparel and equipment than individuals with a net household income below €1,000. Expenditure on sports apparel and equipment can therefore be described as income-elastic.

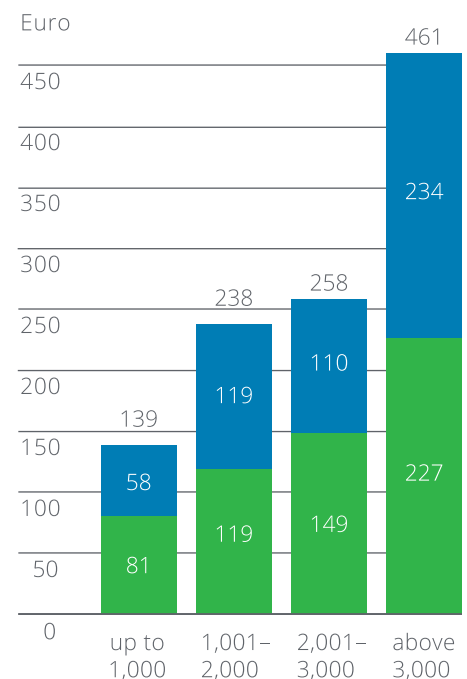
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



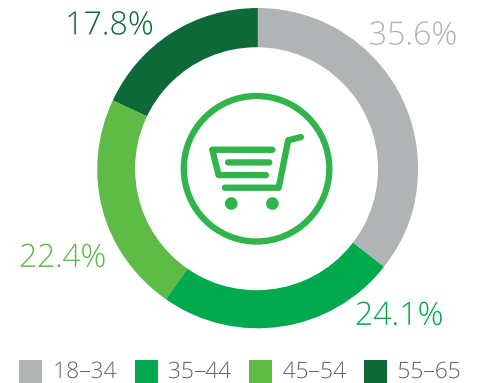
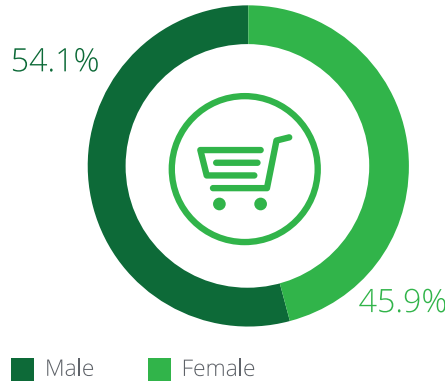
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in Austria prefer to shop their sporting goods in stationary stores (74.1%). On average, Stationary shoppers spend €302 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 18 and 34 years old.

#### Demography of Stationary shoppers



#### Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Possibility to try on/out (1.6)
2	Quality of advice (1.8)
3	Price (1.9)

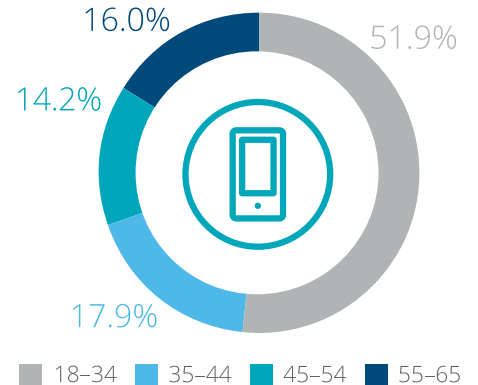
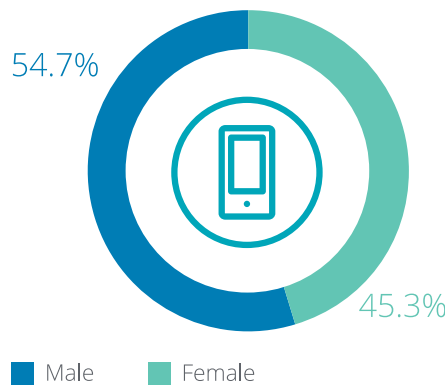
#### Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (45.2%)
2	Special offers (41.3%)
3	Simple & free returns (37.6%)

### Online shoppers

25.9% of actives in Austria prefer to shop their sporting goods online. On average, Online shoppers spend €275 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be male, with the majority of Online shoppers between 18 and 34 years old.

#### Demography of Online shoppers



#### Relevant decision criteria for Online shoppers<sup>1</sup>

1	Convenient ordering & home delivery (1.7)
2	Price (1.7)
3	Simple & free returns (1.8)

#### Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Special offers (62.3%)
2	Price (61.3%)
3	Proximity/accessibility (51.9%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.

# Bulgaria

## Most popular sports

Fitness is the most popular sport practiced by actives in Bulgaria, followed by running and football. On average, actives in Bulgaria spend 8.9 hours per week on sports.

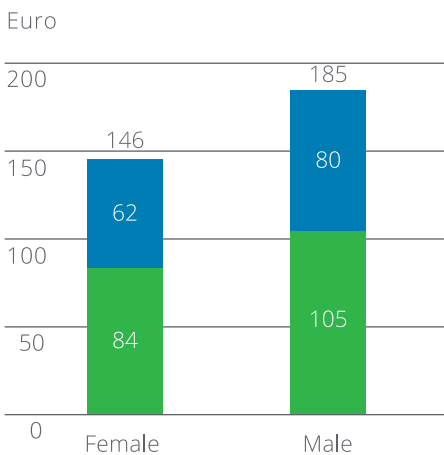
1	Fitness (44.4%)
2	Running (40.2%)
3	Football (26.5%)
4	Swimming (20.1%)
5	Table tennis (18.4%)

## Expenditure on sports apparel and equipment

On average, actives in Bulgaria spend €169 p.a. on sports apparel and equipment. Active males in Bulgaria report higher expenditure on sports apparel and equipment than active females (€185 and €146, respectively). Expenditure on sports apparel and equipment is highest for the age group 18-34 and lowest for the age group 45-54.

Individuals with a net household income between €2,000 and €3,000 per month spend the highest amount on sports apparel and equipment, while individuals with a net household income below €1,000 spend the least.

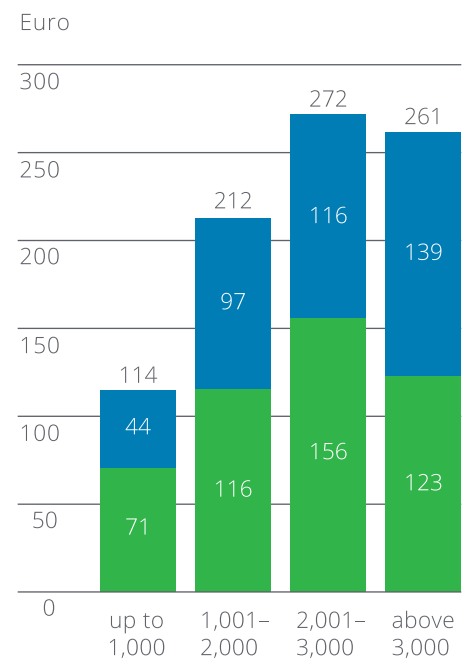
Expenditure on sports apparel and equipment of actives by gender



Expenditure on sports apparel and equipment of actives by age



Expenditure on sports apparel and equipment of actives by income



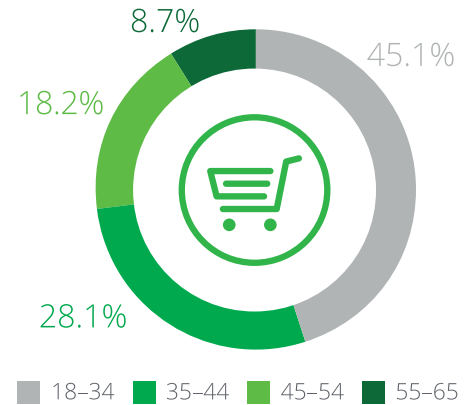
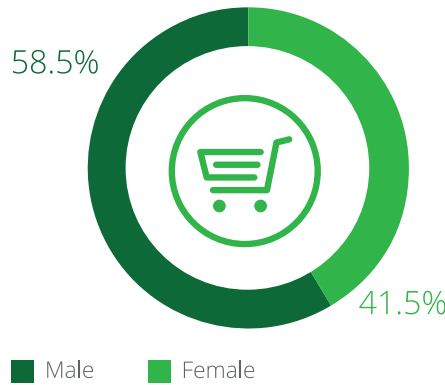
Note: 1) Multiple answers possible.

■ Sports apparel ■ Sports equipment

### Stationary shoppers

The majority of actives in Bulgaria prefer to shop their sporting goods in stationary stores (70.7%). On average, Stationary shoppers spend €169 p.a. on sports apparel and equipment. They are slightly more likely to be male, with the largest group of Stationary shoppers between 18 and 34 years old.

Demography of Stationary shoppers



Relevant decision criteria for Stationary shoppers<sup>1</sup>

1	Price (1.7)
2	Large assortment (1.8)
3	Possibility to try on/out (1.8)

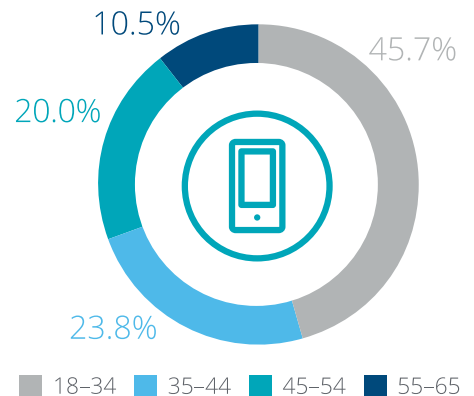
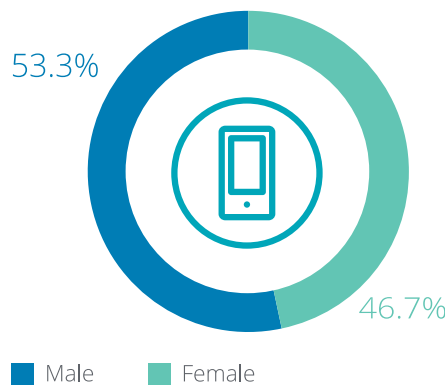
Switching reasons for Stationary shoppers to online shopping<sup>2</sup>

1	Price (65.2%)
2	Simple & free returns (55.7%)
3	Special offers (53.8%)

### Online shoppers

29.3% of actives in Bulgaria prefer to shop their sporting goods online. On average, Online shoppers spend €167 p.a. on sports apparel and equipment. Online shoppers are slightly more likely to be male, with the largest group of Online shoppers between 18 and 34 years old.

Demography of Online shoppers



Relevant decision criteria for Online shoppers<sup>1</sup>

1	Price (1.6)
2	Large assortment (1.8)
3	Purchase independent of time of day (1.9)

Switching reasons for Online shoppers to stationary shopping<sup>2</sup>

1	Price (63.8%)
2	Special offers (58.1%)
3	Proximity/accessibility (52.4%)

Note: 1) Multiple answers possible. Scale from 1 to 5 with 1 representing "very important" and 5 representing "not important at all".

2) Multiple answers possible.



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