

# ATTITUDES TOWARDS EXERCISE TRENDS – GERMANY – 2022

While still recovering from the pandemic's impact, fitness providers can tackle the cost-of-living crisis by showing their value through social circles and unique exercise types exclusively accessible at facilities.



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# Attitudes Towards Exercise Trends - Germany - 2022

## This report looks at the following areas:

- Implications of the growing cost-of-living crisis on the German fitness market
- Exercise frequency, comparison with typical behaviour pre-pandemic
- Exercise location, outlook on return to indoor facilities vs home/outdoor workouts
- Past and future engagement with exercise types
- Purchase intentions for sports goods and services
- Attitudes towards exercise and consumer segmentation analysis



While still recovering from the pandemic's impact, fitness providers can tackle the cost-of-living crisis by showing their value through social circles and unique exercise types exclusively accessible at facilities.

## Overview

In response to inflation and the energy crisis, **exercising goods and services are becoming more expensive**. Sports goods prices increased by **11%** between Jan 2020 and Jun 2022; gym membership fees increased more moderately (4%) due to long-term contracts and the strong position of discounter gyms.

Fitness providers are in a **balancing act between increasing prices and reducing their service quality**. As **Germans' spending power** declines, the fitness market faces the **threat of exercisers switching to low-cost exercises**, such as home workouts. **29% of Germans** would cancel gym/other subscriptions if forced to make savings.

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Fitness facilities can address exercisers' demand to return to exercise facilities. Even **56% of exercisers who plan to purchase an online exercise programme/app** in the next 12 months **agree that online workouts/classes are less fun than in-person workouts/classes**. Brands can focus on creating **welcoming spaces that stimulate the mind and the body** to address the existing gender gap in gyms or provide **exclusive twists on popular home workouts**, such as aerial yoga, to further showcase their value.

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# Report Content



## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for exercise facilities and services

### Market context

- Fitness industry at risk of consumers' cutbacks
- Rising energy costs – the new challenge for fitness providers
- Rise in obesity during the pandemic ties in with lower exercise levels

### Opportunities

- Keep financially concerned exercisers engaged with home workouts
- Entice exercisers' return to venues with exclusive twists on home workouts
- Showcase mental health benefits of in-person workouts for holistic consumers
  - Graph 1: exercise frequency by consumer segmentation, 2022
- Quick download resources

## MARKET DRIVERS

- Strong post-COVID-19 bounceback followed by a period of slower growth
  - Graph 2: key economic data, in real terms, 2019-24
- Economic slowdown fueled by conflict in Ukraine
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

### The impact of the economy on exercise trends

- Fitness industry at risk of consumers' cut backs
- Exercising goods and services becoming more expensive
  - Graph 3: consumer price index for sports goods and services, 2020-22
- Rising energy costs create the need for enhanced efficiency
- Balancing act between price increases and quality reductions
  - Graph 4: preferences for changes due to rising prices, 2022
- Balancing act between price increases and quality reductions

### Public health

- Regular physical activity crucial for health

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- Half of the nation faces obesity or overweight
- Rise in obesity during the pandemic correlates with lower exercise levels
- Demographic reality takes shape
  - Graph 5: share of maximum adult population projections, by age group, 2022-32
- Motivate seniors to exercise for growth opportunities among an ageing population

## Health and fitness clubs

- Devastating impact of gym closures on the value of health & fitness clubs
- Devastating impact of gym closures on the value of health & fitness clubs
- Continued investment in exercise facilities from health & fitness club chains

## The new normal

- Hybrid workers driving exercise participation
  - Graph 6: exercise frequency, by work location – NET, 2022
- Hybrid workers driving exercise participation

## WHAT CONSUMERS WANT AND WHY

### Exercise frequency

- Room for growth on current exercise participation levels
- Exercise frequency seems to recover ahead of participation levels
- Attract older men with social events
- Gamify to get consumers moving
- Non-exercisers hugely critical of potential benefits from sports
  - Graph 7: agreement with attitudes towards exercising, by exercise participation, 2022

### Exercise location

- Create welcoming spaces to address gender gap
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- Make outdoor workouts accessible to various types of exercise

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- Endurance workouts set to lead the ranking of types of exercise again
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  - Graph 10: types of exercise in the last 12 months\*, 2022
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- Combine exercise types to help exercisers achieve workout goals
  - Graph 11: flexibility and strength workout participation in the last 12 months\*\*, by gender and age, 2022

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- Graph 12: typical flexibility and strength workout participation before the pandemic\*, by gender and age, 2020
- Promote engagement across different exercise types for improved results
- Drive up exercise frequencies by promoting variation in exercise types

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- Imprint athletic appearance in consumers' lifestyles
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- Imprint athleticism in consumers' lifestyles
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- Entice exercisers' return to venues with exclusive twists on home workouts

## Attitudes towards exercise

- Health benefits of exercise stand out to Germans
  - Graph 14: attitudes towards exercising, 2022
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- Showcase mental health benefits of group workouts for holistic consumers

## LAUNCH ACTIVITY AND INNOVATION

- Outdoor fitness across rooftops, landmarks and festivals
- Prescribing movement to tackle ill health
- Comfort meets style as sportswear hits high street fashion
- Utilise digital solutions to drive consumer spend
- Tailor exercise recommendations with personalised tech features
- New product launches in consumer goods tap into holistic wellbeing

## Advertising and marketing activity

- John Reed partnering with local artists for an inspiring look
- Clever fit launched brand movie advocating for inclusivity
- Urban Sports Club showing off the benefits of flexibility

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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