

# 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.



Hannah Sandow, Health & Wellbeing Principal Analyst, Germany



# 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.

**BUY THIS REPORT NOW**


**€2600.00 | £2195.00 | \$2995.00\***

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

**MINTEL**

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.



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.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

# 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

# Attitudes towards Exercise Trends – Germany – 2022

---

- 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
  - Graph 8: exercise location in the last 12 months, by gender, 2022
- Keep financially concerned exercisers engaged with home workouts
- Increase comfort levels in gyms for more body positivity
- Make outdoor workouts accessible to various types of exercise

### Types of exercise

- Endurance workouts set to lead the ranking of types of exercise again
  - Graph 9: types of exercise planned in the next 12 months\*\*, 2022
  - Graph 10: types of exercise in the last 12 months\*, 2022
- Promote endurance workouts by pushing for a gradual increase of intensity in low- impact workouts
- 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

# Attitudes towards Exercise Trends – Germany – 2022

---

- 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

## Purchase intentions for exercise

- Imprint athletic appearance in consumers' lifestyles
  - Graph 13: purchase intentions for sports goods and services, 2022
- Imprint athleticism in consumers' lifestyles
- Encourage higher spend in fitness venues with diet and nutrition products
- 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
- Simplify exercise recommendations to anchor frequent exercise habits
- Promote exercise as much sought-after stress relief

## Consumer segmentation

- German fitness consumer segments
- Generational differences in attitudes towards exercise
  - Graph 15: consumer segmentation, by age and gender, 2022
- Group 1: the social fitness consumer (28%)
  - Graph 16: social fitness consumer segment, by gender, 2022
  - Graph 17: social fitness consumer segment, by age, 2022
- Group 2: the results-driven fitness consumer (25%)
  - Graph 18: results-driven fitness consumer segment, by gender, 2022
  - Graph 19: results-driven fitness consumer segment by age, 2022
- Exercise frequency determined by motivational drive
  - Graph 20: exercise frequency by consumer segmentation, 2022
- Group 3: the sceptical fitness consumer (24%)
  - Graph 21: sceptical fitness consumer segment by age, 2022
  - Graph 22: sceptical fitness consumer segment by gender, 2022
- Draw sceptics in with enjoyable exercise
- Group 4: the holistic fitness consumer (23%)
  - Graph 23: holistic fitness consumer segment by age, 2022
  - Graph 24: holistic fitness consumer segment by gender, 2022
- 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

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850