

HEALTH AND FITNESS CLUBS – GERMANY – 2023

While low-cost gyms are set to benefit in times of high inflation, mid-market brands can convince Germans with offers improving total wellbeing (eg medical treatments).



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Health And Fitness Clubs - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on private health and fitness clubs, including changes in consumer behaviour.
- Usage of and interest in private health and fitness clubs, as a member or via a third-party subscription including chains and independent clubs.
- Frequency of health and fitness club visits and monthly costs.
- Barriers to using private health and fitness clubs.
- Interest in additional health and fitness club offers and willingness to pay extra.
- Behaviours towards health and fitness clubs with a focus on Baby Boomers.



While low-cost gyms are set to benefit in times of high inflation, mid-market brands can convince Germans with offers improving total wellbeing (eg medical treatments).

Overview

While **80% of Gen Z** use or is interested to use private health and fitness clubs, only **19% of Baby Boomers** use health and fitness clubs or would be interested to do so. Brands can **target their most engaged consumers, Gen Z via social media**, but they also need to **engage Baby Boomers more strongly**, given the aging society and their poorer health status.

In times of high inflation Germans have to balance their spending, and **spending on health and fitness clubs is at risk as it is non-essential**. As financial confidence for the coming year remains low, low-cost clubs can focus on cheaper deals.

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Clubs in the mid-market are more affected by users who are considering cancelling their membership/third party online subscription service due rising living costs at **68%** (vs 57% of members/subscribers to low-cost clubs). **Mid-market brands need to demonstrate their value** with additional offers included in a membership and can promote **membership options at different price points**.

With Germans putting a higher priority on health, gyms are well placed to **broaden their scope to become more of a lifestyle brand helping users to adopt healthy habits**, instead of solely promoting fitness. Brands can **capitalise on additional offers improving total wellbeing**, such as medical treatments, mental wellbeing classes or nutritional advice, generating sales.

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Report Content

EXECUTIVE SUMMARY

- The five year outlook for health and fitness clubs

Market context

- Consumers need to balance their spending during the enduring cost-of-living crisis
- Germans need help to adopt a healthy lifestyle
- Baby Boomers are becoming a more important target group for health and fitness clubs

Mintel predicts

- Market size & forecast
- An increasing number of health and fitness club users will drive value growth
- Germans' priority on health will foster continuous growth in volume

Opportunities

- Find smart solutions around the topic of price
- Focus on Gen Z short-term and engage Baby Boomers more strongly long-term
- Convey an holistic understanding of health
- Capitalise on the top three offers (potential) health and fitness club users would pay extra for

MARKET DRIVERS

The German economy

- Stagnation follows a technical recession
 - Graph 1: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure

Impact of the economy on health and fitness clubs

- Prices for health and fitness clubs are rising
 - Graph 2: consumer price index*, 2022-23
- Health and fitness clubs need to generate additional income amid the enduring cost-of-living crisis

Healthy lifestyle

- Mintel's approach towards health and wellbeing
- The mind-body connection
- Physical and mental health are a greater priority for Germans

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- Graph 3: top three aspects with higher priority as a result of the cost of living crisis, 2023
- Germans' worsening health status fuelled by multiple crises

Ageing population

- Demographic change in Germany
 - Graph 4: population structure, by age, 2020-30
- Exercising declines among older generations...
- ...but Baby Boomers are keen to improve their health

Consumer protection

- The end of the contract trap

WHAT CONSUMERS WANT AND WHY

Usage of and interest in health and fitness clubs

- Health and fitness clubs face a broad exercising landscape
- Interact with Gen Z on social media...
- ...and tap into content creation and influencer collaboration
- Most Germans use health and fitness clubs as a member
- Collaborate with third-party services without becoming dependent on them
- Generational differences in usage options
 - Graph 5: interest in using a private health and fitness clubs, 2023
- Cater to parents' needs...
- ...and help couples to find a shared hobby
- Chains: find ways to connect your brand to Germans...
 - Graph 6: types of health and fitness clubs used*, 2023
 - Graph 7: types of health and fitness clubs most interested in**, 2023
- ...and leverage the athleisure trend
- Support first timers starting to use health and fitness clubs

Frequency of health and fitness club visits and monthly costs

- Germans use health and fitness club regularly
 - Graph 8: frequency of visiting health and fitness clubs, 2023
- Benefit from loyal and frequent users in tough economic times
- Leverage tracking methods to capitalise on younger Germans...
- ...and guide younger men to integrate different types of exercising in their workout schedule
- Find ways to increase value per user
 - Graph 9: money spend for most expensive health and fitness club membership/third-party subscription per month, 2023
- Premium health and fitness clubs: cooperate with employers

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- Show your value through versatility
 - Graph 10: money spend for most expensive health and fitness club membership/third-party subscription per month, by type of usage, 2023

Barriers to using private health and fitness clubs

- Cost is the main barrier to private health and fitness clubs usage
- Promote membership options at different price points
- Broaden your target group
- Support young women to feel comfortable exercising in health and fitness clubs...
- ...with a focus on diversity and body positivity
- Target interested and uninterested consumers separately
 - Graph 11: barriers to using health and fitness clubs, by interest in using health and fitness clubs, 2023
- Help interested Germans to fight their inner couch potato

Interest in additional health and fitness club offers

- Broaden the scope of health and fitness clubs
 - Graph 12: interest in additional health and fitness club offers, 2023
- Leverage offers that improve total wellbeing...
- ...and show Germans that gyms are more than exercising spaces
- Room to up value per member with additional offers
 - Graph 13: repertoire of additional offers interested in and willing to pay extra for, 2023
- Offer medical treatments to appeal to users seeking convenience
- Offer medical treatments to appeal to users seeking convenience
- Tap into mindfulness exercises to make it more mainstream
- Support exercisers to adapt nutrition to their workout plans
- Capitalise on frequent users...
- ...with gamified fitness and challenges

Behaviours towards health and fitness clubs

- Keep consumers engaged during the enduring cost of living crisis
 - Graph 14: behaviours towards health and fitness clubs, 2023
- Brands in the mid-market need to demonstrate their value
 - Graph 15: agreement with "The rising cost of living has made me consider cancelling my membership/third party online subscription service", by money spend on health and fitness clubs**, 2023
- Help Baby Boomers to holistically improve their health...
- ...and offer a social and supportive atmosphere to them

LAUNCH ACTIVITY AND INNOVATION

- Boutique studios are increasingly entering the German market

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- Product innovations: analysing tools
- Gold's Gym focuses on sustainability
- Digitalisation in health and fitness clubs
- Product launches in sports nutrition

Advertising and marketing activity

- HYROX promotes its competitive events
- Fitness First addresses consumers' motivation
- FitX leverages collaboration with the NFL
- Peloton shows how to target older consumers

MARKET SHARE

- Chains are on their way to become market leader in value and volume terms
 - Graph 16: volume share of types of health and fitness clubs, 2019-22
 - Graph 17: value share of types of health and fitness clubs, 2019-22

MARKET SIZE, SEGMENTATION AND FORECAST

- Rising prices and growing membership numbers lead to market value growth
- Chains are driving volume growth...
- ...and are in a more stable financial position
- Market value growth is driven by rising prices...
- ...and a growing number of members
- An increasing number of health and fitness club users will drive value growth
- Germans' priority on health will foster continuous growth in volume
- Low-cost health and fitness clubs will benefit in the short-term
- Germans will invest more strongly in total health in the mid-term
- Positive outlook in the long-term

APPENDIX

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

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

Appendix – market size and central forecast methodology

- Forecast methodology

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- Forecast methodology – fan chart
- Market size – value
- Market size – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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