

THE FUTURE OF SPORT, HEALTH & RETAIL

- > Where sport and health merge
- > The era of health in retail
- > 9 Mindshifts for the sports industry

The future of sport, health & retail

BACKGROUND

What belongs together comes together. Sport and health are growing ever closer together. Fueled by the health megatrend, the understanding and definition of sport is changing – and this affects almost every aspect of a person's life. Exercise and the absence of illness do not define sport or good health – it is much more about a holistic view and a change in self-care and expectations from the consumer. This changes everything: consumption, the workplace, prevention and purchasing behavior. This presents opportunities – even or especially for traditional sports retailers.

OBJECTIVE

Clarity and orientation on the changing and future role of sport in interaction with health as well as the effects and expectations of the consumer towards the industry. It provides a pan-European

view of future trends through the eyes of people and consumers. The white paper looks at the interaction between sport and health ([Chapter 1, from page 4](#)) and the impact on touchpoints such as retail and how it will evolve ([Chapter 2, from page 14](#)).

WHAT MAKES THIS WHITE PAPER SO VALUABLE?

This is the only pan-European survey of over 1,800 people that focuses specifically on the interaction between sport and health in order to provide information and guidance for decision-makers in sport and healthcare. The white paper also clarifies the potential in retail, why corporate health is important and where the sports and healthcare industry need to address the unfulfilled expectations and deficits of the healthcare system.

Parameters

PARTICIPANTS	n=1,816
COUNTRIES	DE, AT, CH, NOR, DK, SE, FIN, ES, FR, IT, GB
AGE DISTRIBUTION	14 – 19 years of age: 4.2 % 20 – 24 years of age: 7.9 % 25 – 29 years of age: 9.1 % 30 – 34 years of age: 9.4 % 35 – 39 years of age: 12.0 % 40 – 44 years of age: 11.4 % 45 – 49 years of age: 11.5 % 50 – 54 years of age: 11.3 % 55 – 59 years of age: 11.3 % 60 – 65 years of age: 11.8 %
GENDER DISTRIBUTION	48.6 % female 51.2 % male 0.2 % diverse or not specified

PLEASE NOTE

The survey was conducted with a sample size of n=1,816 across Europe. When recruiting test persons, equal distribution of gender and countries was ensured. The survey was conducted anonymously using an online panel and is not statistically modeled. The white paper is based on these results and description as well as learnings are interpretation and curation by ISPO experts to enable the classification and use of the results.

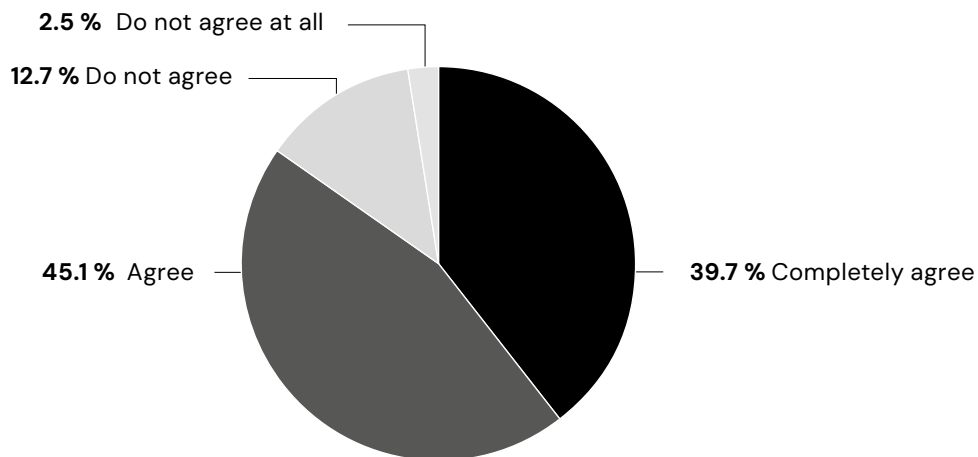
MINDSHIFT #1

Health needs sport and sport needs health

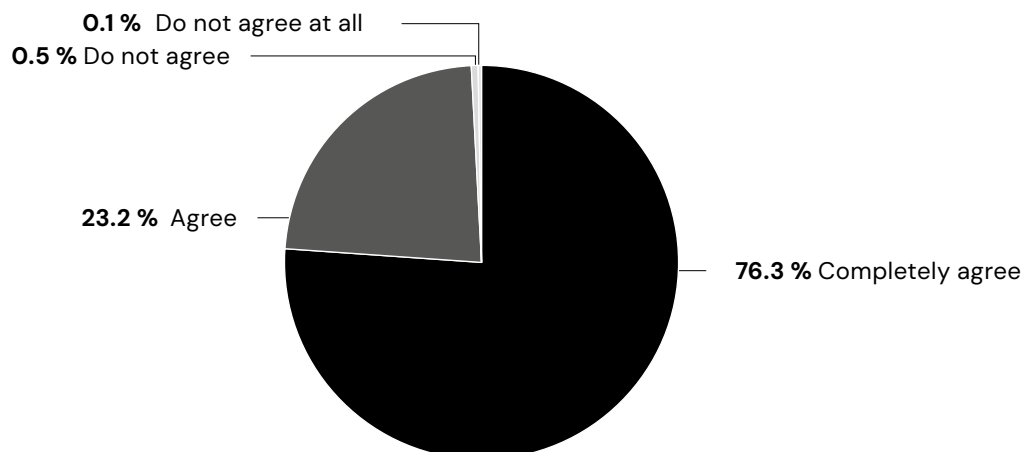
Health cannot be achieved without sport, with mental health being just as important as physical health. As the following results show, the understanding of health is multifaceted and defined holistically. Sport, of course, is an integral component – and this component also serves holistic health.

This is particularly evident in the reasons for doing sport/fitness. Improving/maintaining health is the primary goal here – and mental health is clearly as much the focus as physical health.

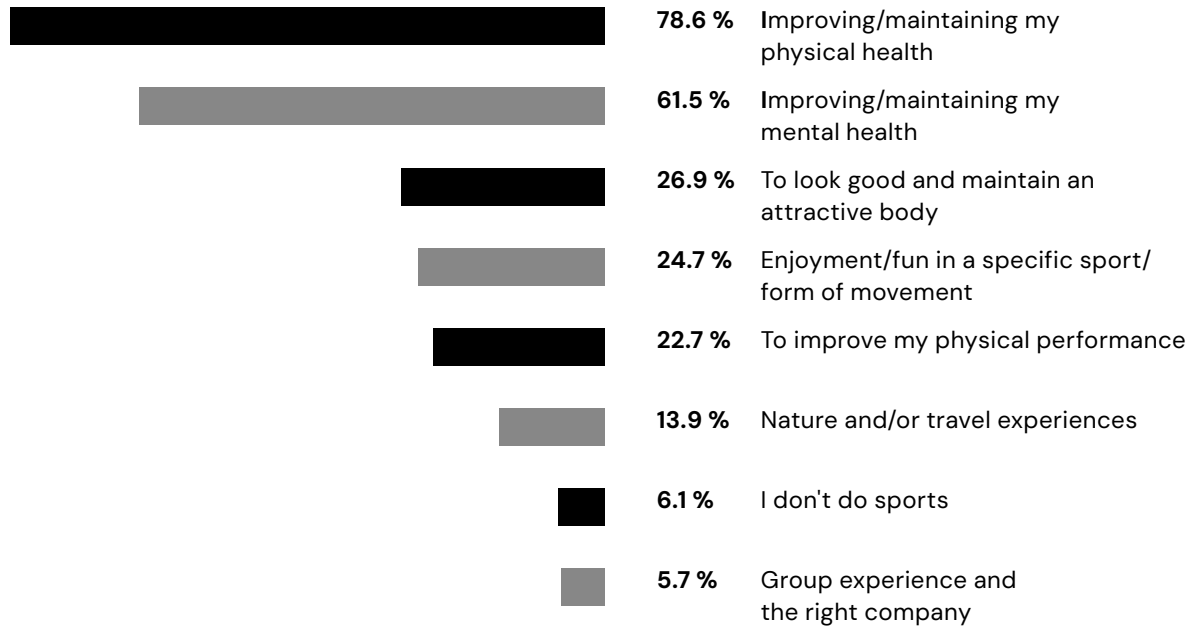
I CONSIDER SPORT TO BE AN INTEGRAL PART OF MY HEALTH MANAGEMENT



MENTAL HEALTH IS JUST AS IMPORTANT AS PHYSICAL HEALTH



WHAT ARE THE MAIN REASONS YOU DO SPORTS/FITNESS?
PLEASE SELECT A MAXIMUM OF THREE ANSWERS



n=1,816

KEY LEARNING

The focus for consumers is clearly on health. However, this is almost only utilized by fitness brands, and they tend to focus solely on physical health. Considering that health – including mental health – is an absolute priority for consumers, there is still considerable potential in this area. This potential can also be activated by sports brands outside the pure fitness sector. A creative campaign can also address the topic indirectly.

MINDSHIFT #2

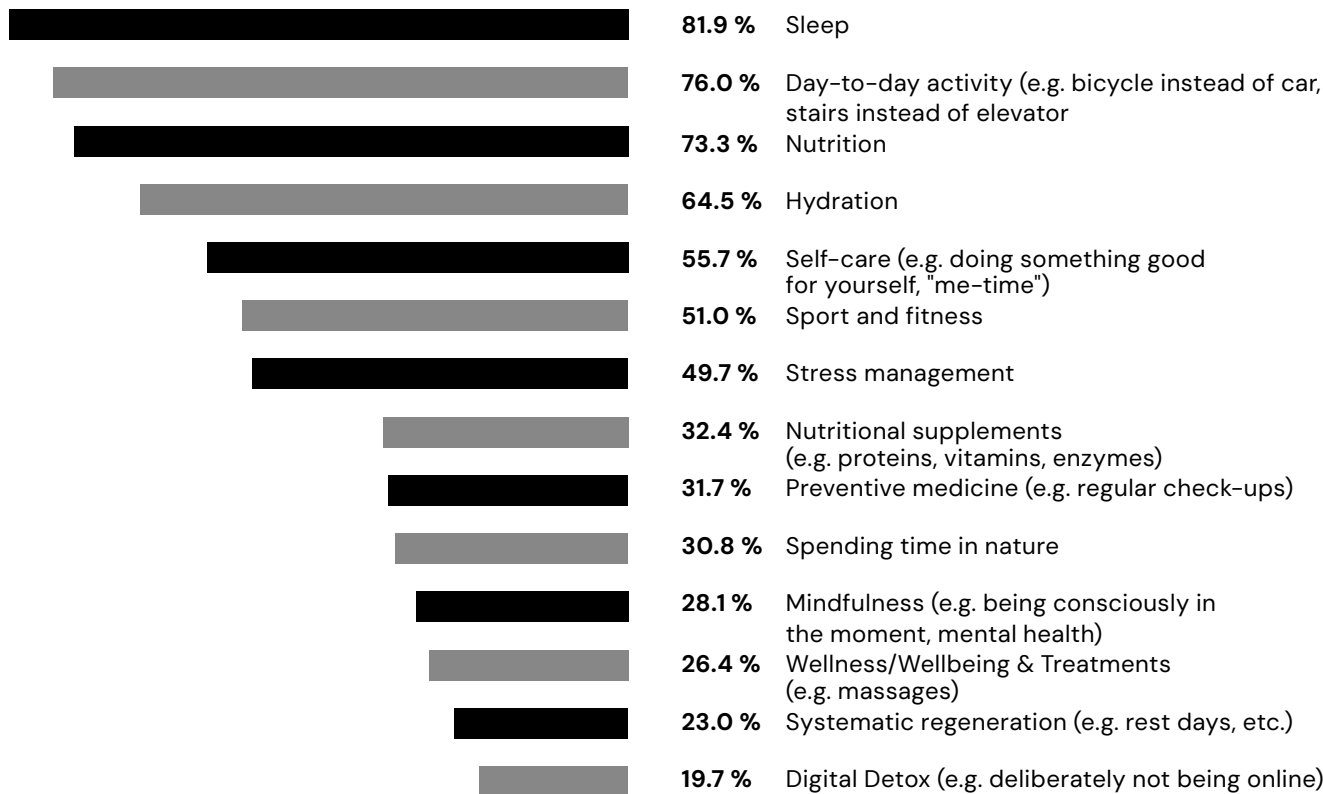
Be a multitool in the toolbox of health

There are many different ways to improve your health, and they affect all aspects of everyday life. Everyday life is an important keyword here. Suitability for everyday use is important, so it is not surprising that day-to-day exercise is the second most important tool in the health management toolbox. The trending topic, however, is sleep. Good sleep, exercise in everyday life and nutrition are the three "top health boosters". Good sleep, stress management and conscious time-outs or self-care also appear to be the elements that bridge the gap between

physical health and mental health. It is much more important for people to regenerate both body and mind.

At the same time, it is important not to make the mistake of focusing exclusively on these three trend topics. For example, spending time in nature is almost as important in individual health management as preventive medicine – in other words, it is an essential part of people's lives.

WHICH OF THE FOLLOWING ISSUES DO YOU CONSIDER TO BE PART OF YOUR PERSONAL HEALTH MANAGEMENT?



n=1,816

KEY LEARNING

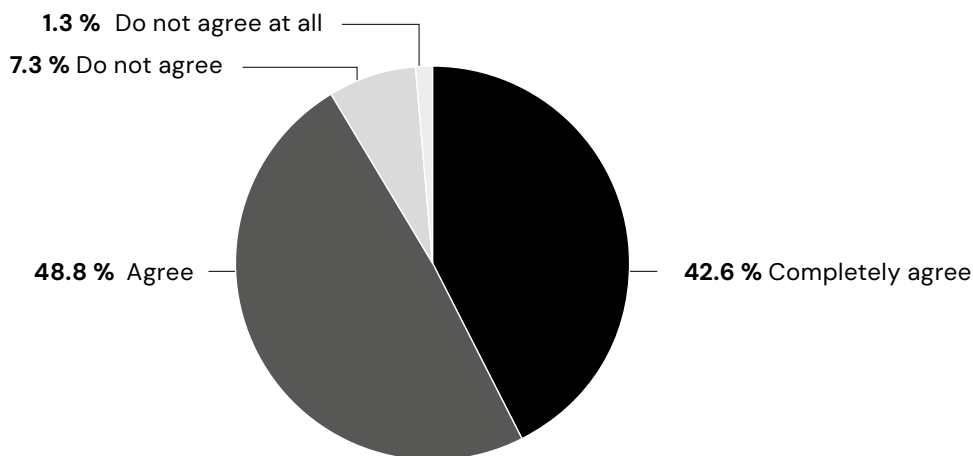
Anyone wanting to play a leading role in the health management toolbox should approach the topic holistically. Health management is multifaceted and should be addressed as such to consumers. After all, life is not just about peak performance and brands can intentionally address this.

MINDSHIFT #3

Nobody likes to walk alone. Let's jump in then

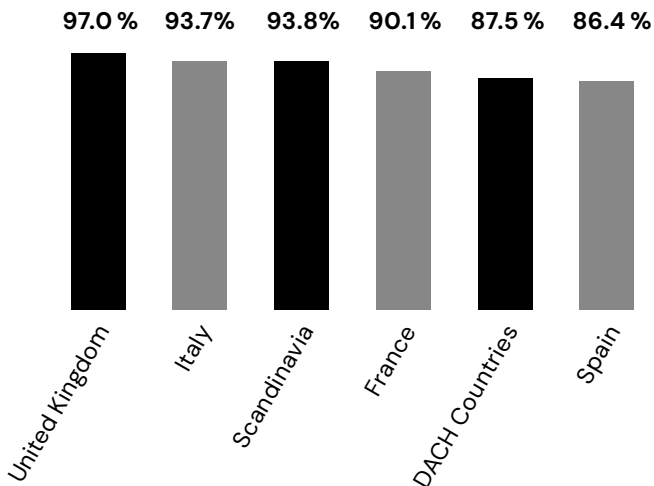
Trust in healthcare systems is declining internationally and across countries. The individual is now much more in demand.

I BELIEVE THAT EVERYONE WILL HAVE TO TAKE MORE RESPONSIBILITY FOR THEIR OWN HEALTH AND CARE FOR THEMSELVES BECAUSE THE HEALTHCARE SYSTEM IN MY COUNTRY IS INCREASINGLY REACHING ITS LIMITS



n=1,816

COMPARISON OF LOW TRUST IN THE HEALTH CARE SYSTEM

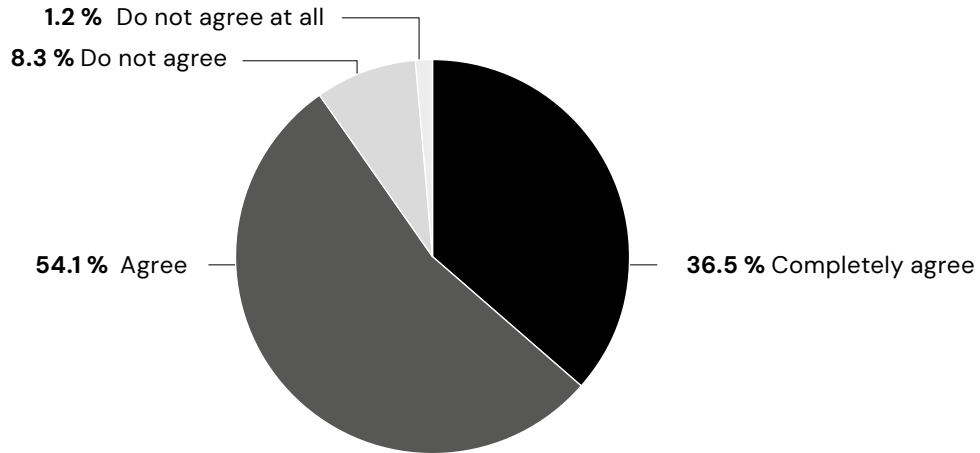


In an international comparison, there are only minor differences. An overwhelming majority do not believe that the healthcare system is adequate and that citizens will have to take much more responsibility for health, prevention and care in the future. At the same time, this creates space and opportunities for the sports and health industry. The so-called second healthcare market is likely to grow and change significantly in the future.

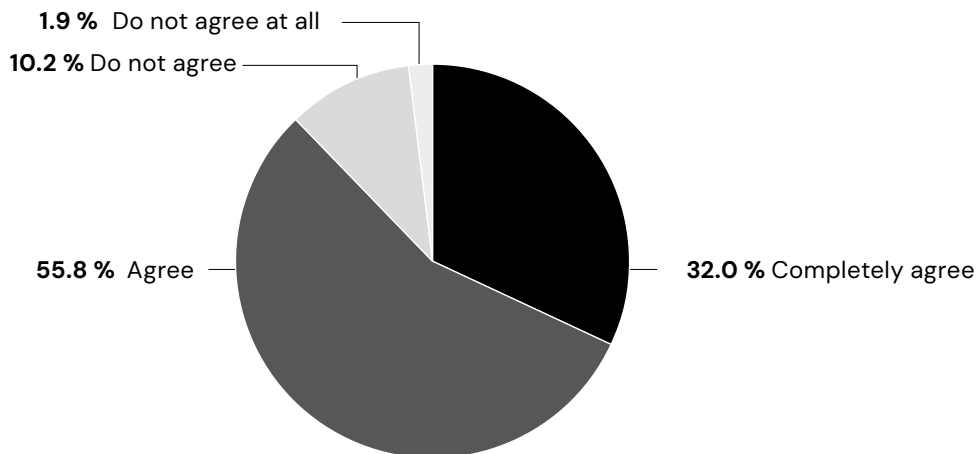
The sports industry's desire to play a stronger role here and to "close the gap" is enormous and the "reason why" is evident in the highly innovative nature of the sports industry. As there is

strong competition and a high pace (due to several collections and many product releases per year), this is quite understandable.

I WOULD LIKE THE SPORTS INDUSTRY TO TAKE ON MORE RESPONSIBILITY IN THE FUTURE AND PLAY A GREATER ROLE REGARDING HEALTH AND PREVENTION



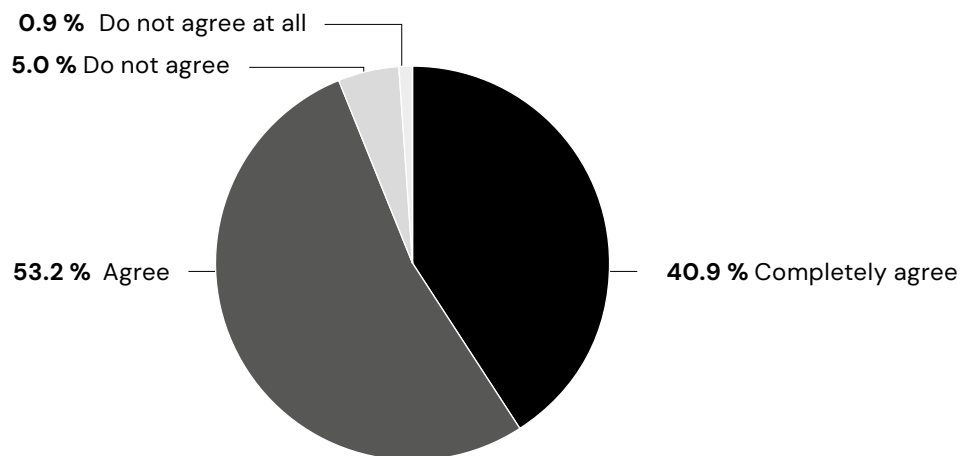
I THINK IT MAKES SENSE FOR THE SPORTS INDUSTRY TO DEVOTE MORE ATTENTION TO THE TOPIC OF HOLISTIC HEALTH, BECAUSE I EXPECT MORE INNOVATIONS AS A RESULT



The increasing overlap between the sports and health sectors is not only a fact, it is also intentional and extends into the regulated medical sector. Consumers explicitly want sport, health and medicine to interact much more closely with each

other. This is reflected, for example, in the idea that health data (through wearables or similar) could be used and applied in a variety of ways.

I WOULD LIKE TO SEE THE MEDICAL AND HEALTHCARE SECTORS WORKING MORE CLOSELY WITH THE SPORTS AND HEALTH INDUSTRY, AS THERE ARE MANY OVERLAPPING AREAS (E.G. ON THE SUBJECT OF PREVENTIVE CARE, USE OF TRACKED HEALTH DATA, ETC.)



n=1,816

Key Learning

The call for the sports and health industries to interact more closely with each other is actually a potential growth driver and a clear imperative from the consumer. Those who position themselves strategically in this area and are prepared to develop and establish stronger cross-industry standards will be able to grow into an enormously strong market of the future.

The application and vision of this fusion clearly extends into the regulated medical sector – this requires an exchange between industry and politics. The playing field and the rules of the game can be redefined and modernized.

MINDSHIFT #4

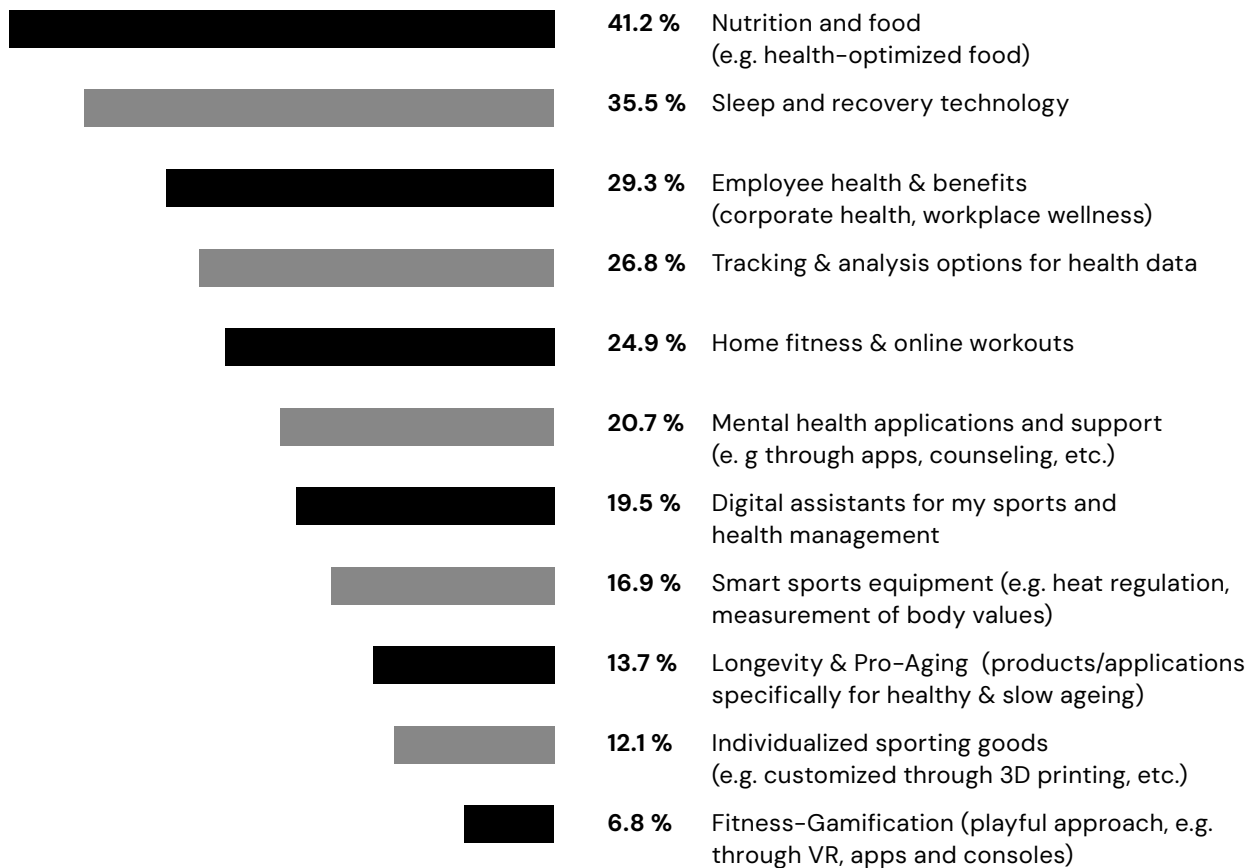
Eat. Sleep. Work. Repeat

Health innovations from the sports industry are in demand (see Mindshift #3). But where are the trends and what do consumers want? The winners are in the areas of nutrition, sleep and relaxation as well as the promising corporate health sector (see also Mindshift #5). However, home fitness and online workouts

as well as the "quantified self" phenomenon, i.e. the comprehensive tracking of body and health data, are also very popular – and this is directly linked to the topics of digital assistants and smart sports equipment. But the field of mental health is also relevant.

IN WHICH AREAS DO YOU HOPE TO SEE THE MOST DEVELOPMENT IN SPORT AND HEALTH?

PLEASE SELECT A MAXIMUM OF THREE ANSWERS



n=1,816

Key Learning

The holistic view of sport and health offers many opportunities to enter new markets in an authentic way and identify growth drivers. It is worth taking a closer look at the trending topics to consider what fits authentically with the core of your own brand.

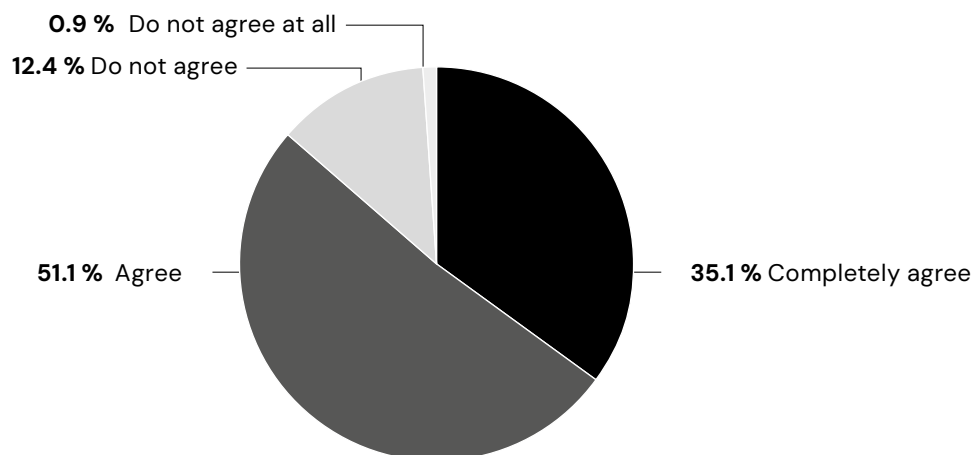
MINDSHIFT #5

Fight for talents? Win with health!

Corporate health is a topic that is already well-established outside of Europe due to the differences in the healthcare sector. But also in Europe, the declining trust in the healthcare system (see above) is increasingly being absorbed by companies.

Corporate health benefits are now a stronger argument than ever in the recruitment of highly sought-after specialists and talent – and rightly so and with great relevance.

I BELIEVE THAT TOO LITTLE IS DONE FOR THE HEALTH OF EMPLOYEES IN COMPANIES IN MY COUNTRY

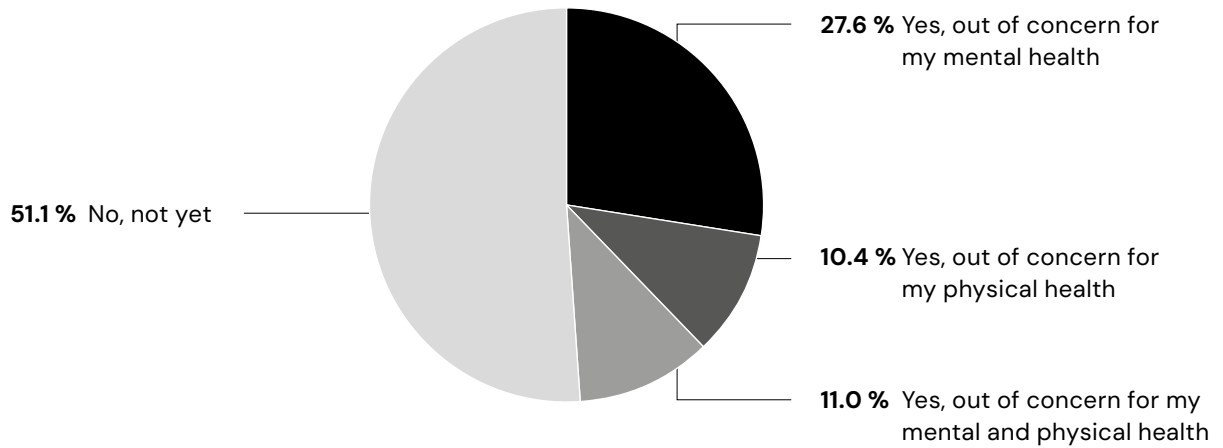


n=1,816

Almost 50 % of all respondents had resigned due to concerns about their health. Of these, just under two thirds of resignations could have been avoided by offering appropriate

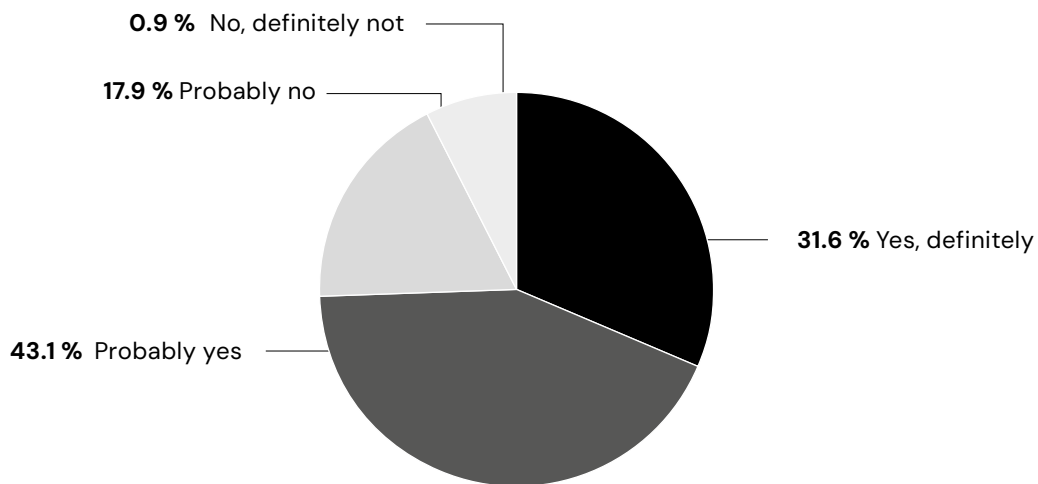
corporate health programmes. This is an underutilised lever for employers – especially in the current shortage of professionals and the war for talent.

HAVE YOU EVER QUIT A JOB BECAUSE IT WAS MENTALLY OR PHYSICALLY HARMFUL TO YOU?



n=1,816

WOULD A BETTER HEALTH AND WELLNESS PROGRAM AT THIS EMPLOYER HAVE PREVENTED YOU FROM QUITTING?

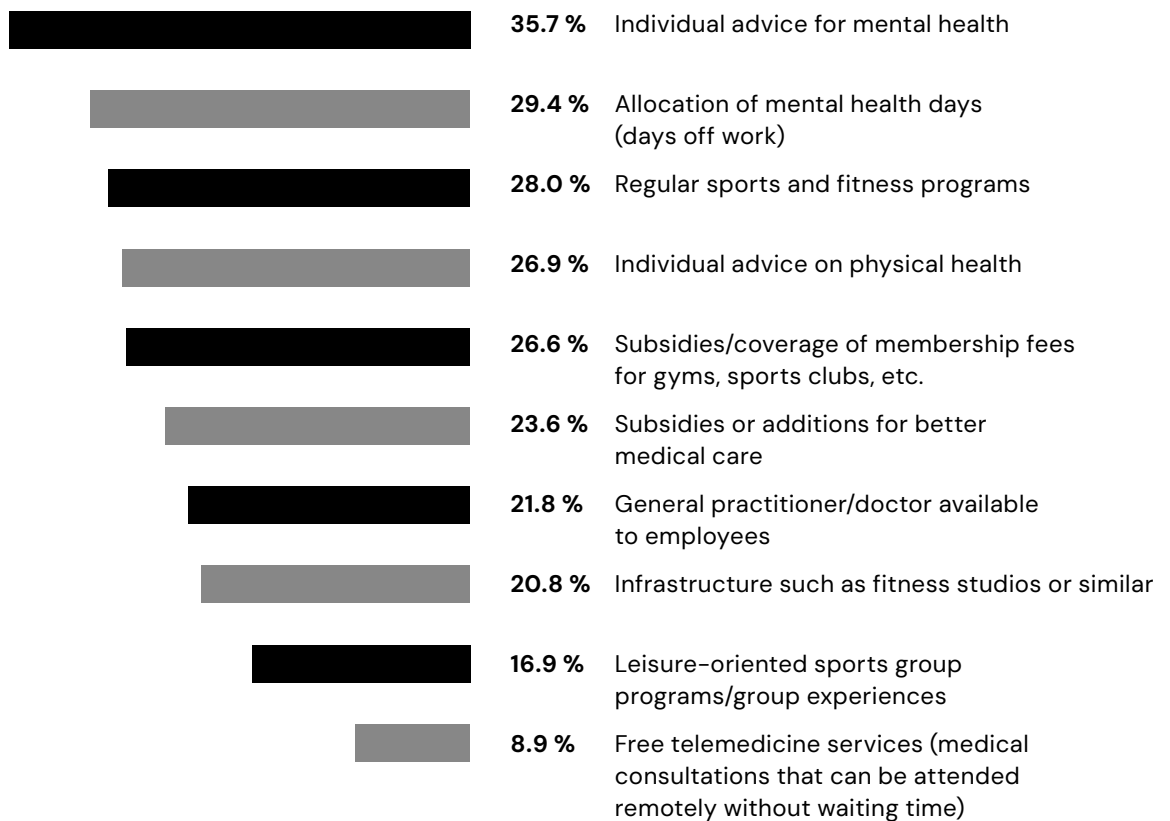


n=889

The possibilities and desires are diverse and almost equally relevant. This offers employers the advantage of being able to score points everywhere and approach this topic, which is still new in Europe, without any major risks.

WHAT OFFERS OR PROGRAMS WOULD YOU LIKE MOST FROM YOUR EMPLOYER?

PLEASE SELECT A MAXIMUM OF THREE ANSWERS



n=1,816

KEY LEARNING

The good news is that employers can't make many mistakes at the moment. Anyone offering health and wellness services is met with a high level of relevance and at the same time almost all offers are accepted with appreciation. This shows that the topic is still young and that both employers and employees still have little experience in this area.

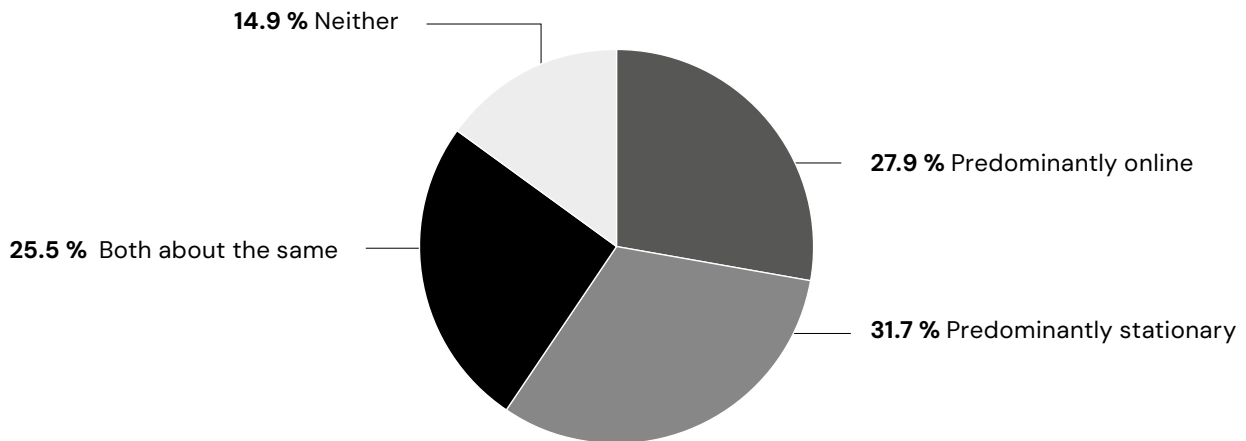
This is likely to change in the future, which is why it is worth introducing corporate health – especially in the highly competitive field of recruitment. Because the relevance of corporate health will continue to grow.

MINDSHIFT #6

The dead live longer

The end of bricks-and-mortar retail has often been conjured up. But it turns out that the omnichannel approach is the successful way forward. The health megatrend is not bringing about any significant change in the POS-mix either. Bricks-and-mortar retail seems to be a touch more popular and (as you can see from Mindshift #8) a revolution in physical retail may also be imminent.

HOW OFTEN DO YOU BUY SPORTS AND HEALTH PRODUCTS ONLINE COMPARED TO STATIONARY STORES?



n=1,816

KEY LEARNING

Anyone questioning their distribution network and POS strategy will be reassured to see that the omnichannel approach is still the right mix for the majority of market participants.

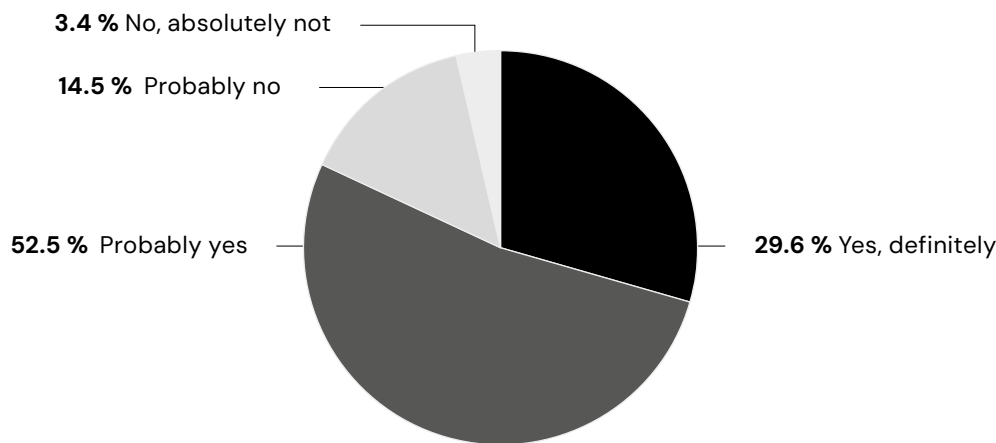
MINDSHIFT #7

If health is also sport, then what is a sports retailer?

Supermarkets, pharmacies and drugstores have long been leading the way. They are already dedicated to the sports-oriented health trends. Sports nutrition, orthotics, nutritional supplements and much more can be found there much more

than in specialist sports retailers. It makes sense to use the existing network of touchpoints and retail partners, because it is in the interests of the consumer.

WOULD YOU LIKE SPORTS STORES TO OFFER MORE THAN JUST SPORTING GOODS AND OFFER PRODUCTS, SERVICES AND ADVICE SO THAT CUSTOMERS CAN FIND EVERYTHING THEY NEED FOR THEIR HEALTH AND WELL-BEING IN ONE PLACE – TO BECOME “HOLISTIC HEALTH CENTERS”, SO TO SPEAK?



n=1,816

KEY LEARNING

If holistically defined health has sport at its heart, then sports retailers are also authentic health touchpoints. This means that the development towards a POS for holistic health would be a logical development that other retail structures (see supermarkets, drugstores) are already demonstrating – with promising opportunities, as this is what consumers want.

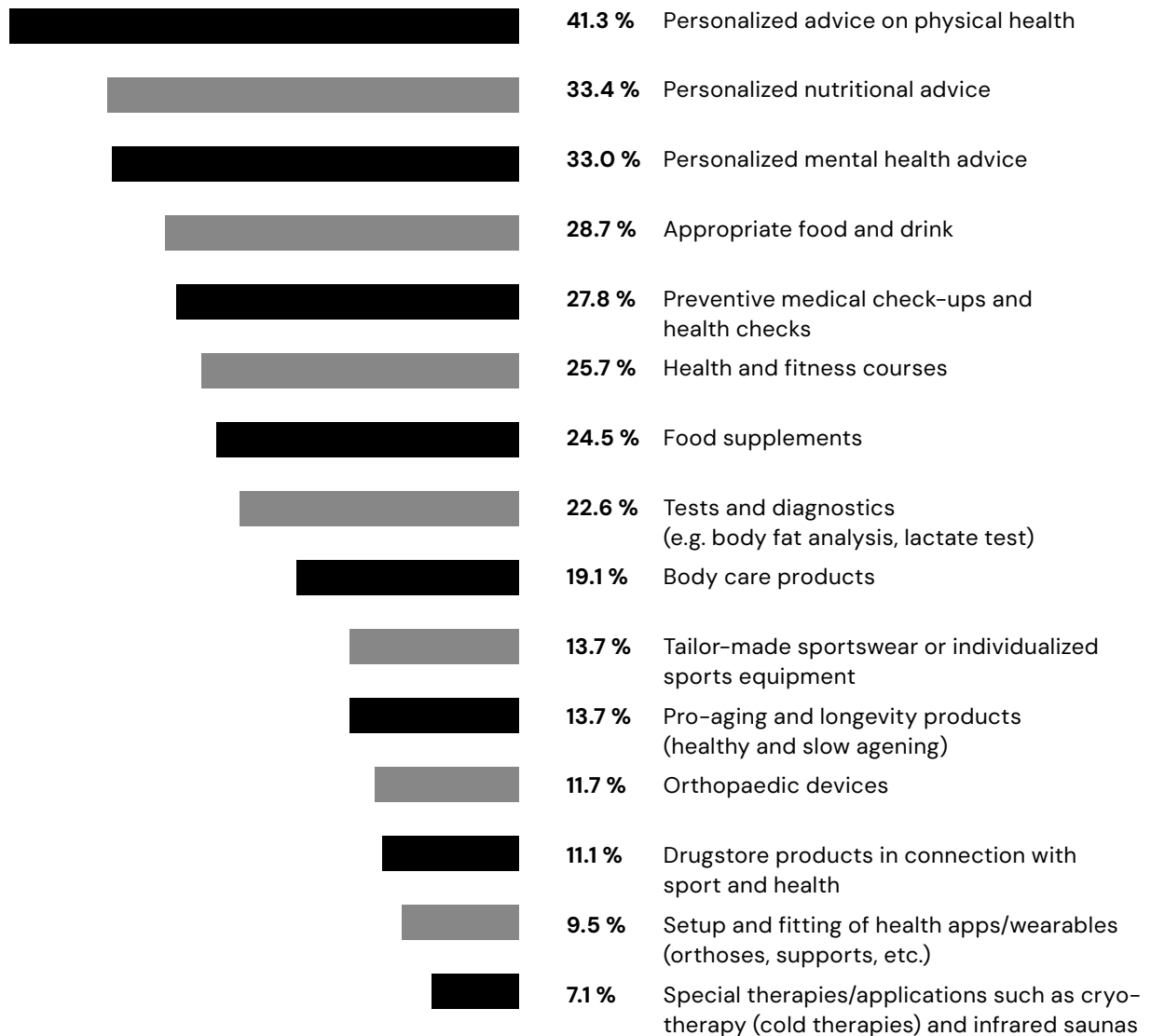
MINDSHIFT #8

You ask health. We answer advice

Sports retailers (especially bricks-and-mortar retailers) have a very clear expertise that consumers also want to take advantage of when it comes to health – their advisory skills. It is noticeable that, among the desired services, sales advice is the most

popular. There are also signs of new and very exciting opportunities, such as the very strong desire for advice on mental health or preventive medical check-ups, tests and diagnostics

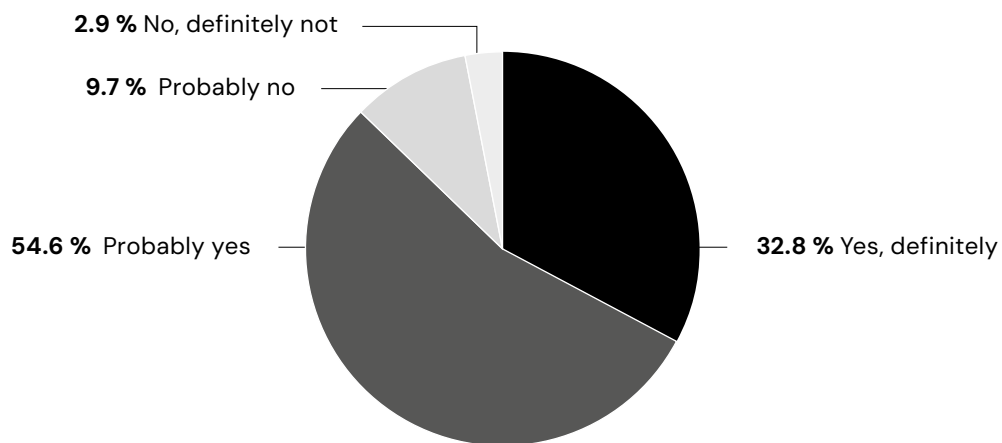
WHAT ADDITIONAL SERVICES OR OFFERS WOULD YOU LIKE TO SEE FROM SPORTS RETAILERS TO OPTIMALLY SUPPORT YOUR HEALTH AND FITNESS?



n=1,816

The potential for brick-and-mortar retailers under pressure to try out the above offers is enormous. Almost 90 % of those surveyed stated that this would make them visit the physical POS more often. This could herald a small revolution in sports retail.

WOULD YOU VISIT STATIONARY SPORTS SHOPS MORE OFTEN IF THE OFFERS YOU SELECTED ABOVE WERE AVAILABLE THERE?



n=1,816

KEY LEARNING

Sports retail can really transform itself (see Mindshift #6) into a health center with a lot of tailwind and relevance. But there is also great potential in the areas of nutrition as well as health and fitness courses.

Sports retailers are also seen as having far more advisory expertise than usual. It gives the impression that consumers are actually just waiting for holistic, health-oriented advice.

MINDSHIFT #9

Love. Every. Contact

Health and sport are growing together like never before at ISPO Munich 24. At the same time, there have never been so many opportunities for participation and for almost every budget.

We all live from selling in one way or another and we all know: there is no business without contact and exchange. No transaction without interaction. So, what is it all about?

Exactly: contact. The neuralgic point that makes everything possible.

Almost 60,000 visitors from around 120 countries come together with 2,400 exhibitors in one place for three days – you won't find this anywhere else. They all look at exciting solutions and hot innovations, introduce each other to the latest trends and premieres from the fields of sport, health and fashion, engage in heated discussions about the pressing issues and challenges of our time, but also celebrate as a community

DON'T MISS OUT.



ISPO WHITE PAPER

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IMPRINT
LOVE EVERY CONTACT

PUBLISHED BY
Messe München GmbH
ISPO Group
Messegelände
81823 München

VERÖFFENTLICHT AM
August 19, 2024

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Claudia Siebenweiber Design, Design
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Online-Panel, horizoom
Christoph Beaufils, Concept, Analysis & Author