

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Participating in sports is no longer just for the development of physical strength, but also seen as a trendy lifestyle choice. Driven by fear of missing out, people are eager to splurg on sports gear and apparel, go to fitness centres and build home gyms."

Alina Ma, Associate Director

This report looks at the following areas:

- Fitness should be an holistic, mindful experience
- The rising popularity of smart fitness

The Chinese government has recognised the important role of sports in developing a more prosperous, proud and happy society and building a high profile in the international stage. As a result, health and fitness are placed at the top of the nation's priority list and Chinese people have become involved in fitness and sports participation more than ever. On the other hand, fitness activities are rising to be a popular leisure choice, as an increasing number of celebrities and influencers post their workout selfies on social media. The prevalence of the fitness trend not only benefits the sports gear, apparel and technology (eg wearables) industry but also drives the growth of the market of sports-related food (eg energy bars) and drinks (eg sports drinks, energy drinks).

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this Report

Executive Summary

The consumer

Healthy eating vs exercise, which contributes more to overall health?

Figure 1: Attitudes towards role of healthy eating vs doing sports and health benefits and social benefits of doing sports, January 2018

Do people really love sports or just follow the fitness fever?

Figure 2: Attitudes towards benefits of sports, % any agree, by consumer group, January 2018

Figure 3: Preferences towards varied sports types, % any agree, by consumer group, January 2018

Looking good vs improving fitness, which claim lures people to spend?

Figure 4: Purchase changes of sports-related products and services compared to six months ago, January 2018

Figure 5: Purchase changes of paying to watch live sports, January 2018

How to generate more profits by tapping into the 'right' sports?

Figure 6: Sports that consumers spend time on following vs sports that consumers have played in the last six months, January 2018

Figure 7: Attitudes towards doing varied sports and playing e-sports, January 2018

What prevents people from doing sports (especially in gyms)?

Figure 8: Reasons for reducing frequency of doing sports in the last six months, January 2018

Figure 9: Changes of where to do sports, January 2018

Figure 10: Reasons for reducing frequency of doing sports in sports and exercising venues in the last six months, January 2018

Chinese vs foreign brands, which are people's favourite?

Figure 11: Top 15 favourite brands of sports products, January 2018

What we think

Issues and Insights

Fitness should be an holistic, mindful experience

The facts

The implications

The rising popularity of smart fitness

The facts

The implications

Figure 12: Examples of North-western University's sweat patch and L'Oréal UV sensor

The Consumer - What You Need to Know

Meaning of doing sports is beyond health

Ball games and outdoor sports attract more people

It has been a good year for the sportswear market

Attitudes towards Sports and Exercise

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Involvement in fitness is relatively lower in China

Figure 13: Frequency of participation in sports and fitness activities in the last 6 months, by country, July 2017 in China, July 2016 in the UK, January 2017 in Canada

Eating right is more important than exercising

Figure 14: Attitudes towards role of healthy eating vs doing sports played in staying healthy, January 2018

Health improvement is far more than doing sports

Figure 15: Attitudes towards health benefits of doing sports, January 2018

Sports topics are a new social currency

Figure 16: Attitudes towards social benefits of doing sports, January 2018

Consumer Segmentation

Diversified motivators in life: food, fashion and function

Figure 17: Consumer groups segmented based on their attitudes, January 2018

Consumer profile of Sports Enthusiasts

Strongly hold belief in the great importance of doing physical sports

Figure 18: Attitudes towards benefits of sports, % any agree, by consumer group, January 2018

Focused and single-minded when watching sports events

Figure 19: Sports-related things done in the past 12 months, by consumer group, January 2018

Figure 20: Things done when watching a sports event, by consumer group, January 2018

Prefer playing sports that are popular, diversified and team-oriented

Figure 21: Attitudes towards preferences towards varied sports types, % any agree, by consumer group, January 2018

Tend to go out of home to do sports

Figure 22: Having done sports more often in different locations, by consumer group, January 2018

Have a practical mindset when purchasing sports-related products

Figure 23: Selective sports-related services that are being used now, by consumer group, January 2018

Figure 24: Having spent more money on sports apparel and shoes compared to 6 months ago, by consumer group, January 2018

Figure 25: Attitudes towards the importance of healthy eating vs doing sports, % any agree, by consumer group, January 2018

Figure 26: Having spent more on sports-related food and drinks compared to 6 months ago, by consumer group, January 2018

Most Popular Sports

Badminton and basketball make it a two-horse race

Figure 27: Sports consumers spend time on following, January 2018

Figure 28: Sports played in the last six months, January 2018

Figure 29: The proportion of sports lovers (ie who not only are interested in following news about the sport but also play the sport), January 2018

Marathon and cycling likely to continue to be popular sports

E-sports are not an enemy to a healthy lifestyle

Figure 30: Attitudes towards e-sports, January 2018

Relationship between different sports

Figure 31: Attitudes towards doing varied sports, January 2018

Figure 32: Sports played in the last six months, by sports played, January 2018

Figure 33: Strongly agree that 'Doing different types of sports is better for health than sticking to one type', by sport lover, January

2018

Figure 34: Strongly agree that 'Sports topics are helpful in building friendship', by sport lover, January 2018

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Influencing factors of sports preferences

Figure 35: Sports played in the last six months, by gender, January 2018

Figure 36: Sports played in the last six months, by generation, January 2018

Barriers to Doing Sports

Is cold weather the fundamental barrier to doing sports?

Figure 37: Reasons for reducing frequency of doing sports in the last six months, January 2018

Why people lapse usage of sports/exercising venues?

Figure 38: Reasons for reducing frequency of doing sports in sports and exercising venues in the last six months, January 2018

Figure 39: Examples of workout pod

Where to Do Sports

Prefer outdoor or indoor?

Figure 40: Changes of where to do sports, January 2018

Figure 41: Having done more sports in different locations compared to 6 months ago, by gender, January 2018

The growing market of home gyms

Figure 42: Frequency of doing sports in different locations, December 2017

Figure 43: Examples of exercise desk

Lower motivation to use fitness centres frequently

Figure 44: Frequency of doing sports in different locations, December 2017

Figure 45: Frequency of doing sports in different locations among self-claimed professionals in sports and exercise (eg athlete, coach), December 2017

Sports location preferences across company type

Figure 46: Having done more sports compared to 6 months ago in different locations, by company type, January 2018

Purchase Trends

Most consumers spend the same on varied sports-related categories

Figure 47: Purchase changes of sports-related products and services compared to six months ago, January 2018

Optimisation opportunities for sports-related drinks

Figure 48: Attributes associated with different types of sports-related drinks brands, January 2017

Figure 49: Consumption of different sports-related foods, January 2018

Fitness classes and equipment preferences across age and gender $% \left(1\right) =\left(1\right) \left(1\right) \left($

Figure 50: Having spent more money on home gym equipment vs fitness classes compared to 6 months ago, by age and gender, January 2018

January 2018 Figure 51: Living status, by age, January 2018

Desire for paying for live sports

Figure 52: Purchase changes of watching live sports, January 2018

Figure 53: Having spent more on paid live sports competitions, by consumer group, January 2018

Favourite Sports Brands

The top three brands account for the lion's share

Figure 54: Spontaneous answers to favourite brands of sports products, January 2018

Are Chinese brands doing well?

Figure 55: Top 15 favourite brands of sports products, January 2018

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumer preferences of the top three

- Figure 56: Spontaneous answers to favourite brands of sports products, by age, January 2018
- Figure 57: Personal income, by age, January 2018
- Figure 58: Spontaneous answers to favourite brands of sports products, by number of children, January 2018
- Figure 59: Spontaneous answers to favourite brands of sports products, by city tier, January 2018
- Figure 60: Spontaneous answers to favourite brands of sports products, by occupation, January 2018
- Figure 61: Personal income, by occupation, January 2018
- Figure 62: Lifestyle statement, by occupation, January 2018

Different Sports Lovers' Preferences

Sports programmes watching behaviours

- Figure 63: Sports programmes watching preferences, by ways of watching sports, January 2018
- Figure 64: Having spent more on watching live sports compared to 6 months ago, by sport lover, January 2018
- Figure 65: Sports popularity ranking, January 2018

Social media following behaviours

Figure 66: Sports following preferences, by sport lover, January 2018

Food and drinks purchase

Figure 67: Having spent more on sports-related food and drinks compared to 6 months ago, by sport lover, January 2018

Fitness classes and equipment purchase

Figure 68: Having spent more on fitness classes and equipment compared to 6 months ago, by sport lover, January 2018

Apparel and shoes purchase

Figure 69: Having spent more on apparel and shoes compared to 6 months ago, by sport lover, January 2018

Meet the Mintropolitans

More into sports participation due to passion not social pressure

- Figure 70: Consumer segmentation based on their attitudes, by consumer classification, January 2018
- Figure 71: Having done more sports in different locations compared to 6 months ago, by consumer classification, January 2018
- Figure 72: Having spent more money on fitness classes and equipment compared to 6 months ago, by consumer classification, January 2018

Which sports-related categories will see better performance?

Figure 73: Having spent more money on sports-related clothing and food compared to 6 months ago, by consumer classification, January 2018

Figure 74: Sports played in the last six months, by consumer classification, January 2018

Appendix - Methodology and Abbreviations

Methodology

Abbreviations



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com