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Bachelor of Arts Degree

The Setup of the Fitness Industry and the Allegedly  
Contemporary Propositions by Fitness Studios in  
Modern Day Germany

in the course of study Media Management  
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## Abstract

The fitness studio industry in Germany is a growing market, offering a density of locations to members and potential members. The presented scientific paper examines the setup and development of German fitness studios and reviews whether it is contemporary, according to the progress of technology and customer preferences.

This paper hypothesizes that the setup of the fitness industry is contemporary and meets the needs of the people in modern day Germany. In order to test the hypothesis, first, relevant secondary literature sources available on this topic, are reviewed and reported. Second, an online survey is conducted to answer the hypothesis from the potential customer's perspective and scrutinize whether there is a need for change within the German fitness industry.

Based on the reviewed secondary literature, it is exposed that the different aspects, upon which fitness studios compete, seem to be stagnating since the beginning of the development of the modern fitness studio surrounding. Examples of the current setup are chosen and elaborated in depth, concerning the offerings of individual fitness studio chains. The history of the development of knowledge and interest in sports and the fitness environment is investigated in a previous point of this paper.

For the cause of receiving first hand statements and insights of a test group, which stands representable for the rest of the German people, the questionnaire is constructed and placed on an online media channel. The main findings of the survey are the following: 1. A large number of participants visit or are members of fitness studios in Germany. 2. Depending on the frequency of physical exercising, the mostly young participants are willing to pay a certain amount per visit. 3. The majority of the test group has a wish for more flexibility in the fitness studio environment.

In the conclusion of this research paper the hypothesis is rejected. The decisive analysis concludes that the system of the fitness studio industry is growing, but no innovations are included to provide a contemporary user experience to the German sports people. As a final step, examples for minor changes in the system, with a possible major outcome for the industry as well as the person active in sports, are given as a future outlook.

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# 1 Introduction

The pay per use model plays an important and growing role in modern day society. The fitness industry in Germany has experienced a great change and growth concerning the offerings to the end consumer. A broad mass of people is signed up in contracts with fitness studios for a set period of time. This offers them the same system in usage since the beginning of fitness studios. But does the fitness industry in Germany meet the needs of modern day society in the days of pay per use? As fitness became more and more popular in Germany, various fitness studio chains and independent fitness studios emerged competing by price and the services, courses and training tools they offer. A change in the way people started structuring their personal lives over the last years with the use of modern day media tools, leaves the classic system of propositions and price structures of fitness studios behind.

But how to teach an old dog new tricks? In the days of pay per use, the fitness industry in Germany does not seem to meet the needs of modern day society. Companies like DriveNow, a car sharing organization, are a good example of how a service is provided to the end customer, charging solely the amount of time the service is utilized. This gives the customer flexibility, which nowadays is a main factor to a lot of people.

In order to achieve a reliable outcome, an appropriate standard of knowledge needs to be obtained. The research is supposed to show the development from the beginnings of the fitness trend and its way to the German people, as well as the offerings made by fitness studios and possible development. In addition to that representation of current conditions of the market and conceptualities that are relevant to further research, are described in detail.

Following the fundamental research on the basis of scientific sources, a survey is supposed to contribute to the clarifying of the research question. As a research method, a quantitative survey with a valid basic population is to be conducted. The survey created as an online questionnaire is supposed to reach a preferably broad mass of people. Connected to this, a cooperation with companies within the German fitness industry is possible in order to achieve a higher reach of the survey and therefore obtain a more valid result. The evaluation of the questionnaire shall then lead to new insights concerning the posed question and deliver a result within the scope of the research.

## **2 Research Question**

In this chapter an explanation of the research question is presented, which was designed as a basic question to test if Germany offers a contemporary fitness experience to the people. With regards to the change in the pace of an individual life and the awareness of a healthy living in the German population, the question of “How fit is Germany?” was developed in order to scrutinize the current situation. The question does not only point towards the status quo concerning the health of the individual inhabitant, but also brings the current setup in the offerings of fitness studios into question. This leads to the hypothesis that the setup of the fitness industry is contemporary and meets the needs of the people in modern day Germany. The research in this paper is supposed to offer a basis for further actions to possibly change the structure of fitness offerings today and provide a more accurate and personalized setup to the individual person wanting to pursue physical health.

## **3 Historical Background**

The science of sports and physical activities with the human body can be traced back to the ancient Greek. What we know as sports science today began with a change and systemization of thinking. Platon, Aristoteles and other great thinkers started describing philosophy, which during time developed into the science concerning the topic of sports as we know it nowadays. (Güllich & Krüger, 2013, p. 10)

The understanding of the science of sports as it is now known, developed starting during the Renaissance. According to Immanuel Kant (1724-1804) the human being should be educated towards the idea of using their minds. Several other philosophers questioned the sense of the physical education and how it was supposed to aid with a reasonable education. The main concentration point was that it was assumed that the physical education, the combined rational thinking and acting accordingly played together to provide a chance to become a productive individual. (Güllich & Krüger, 2013, p. 10)

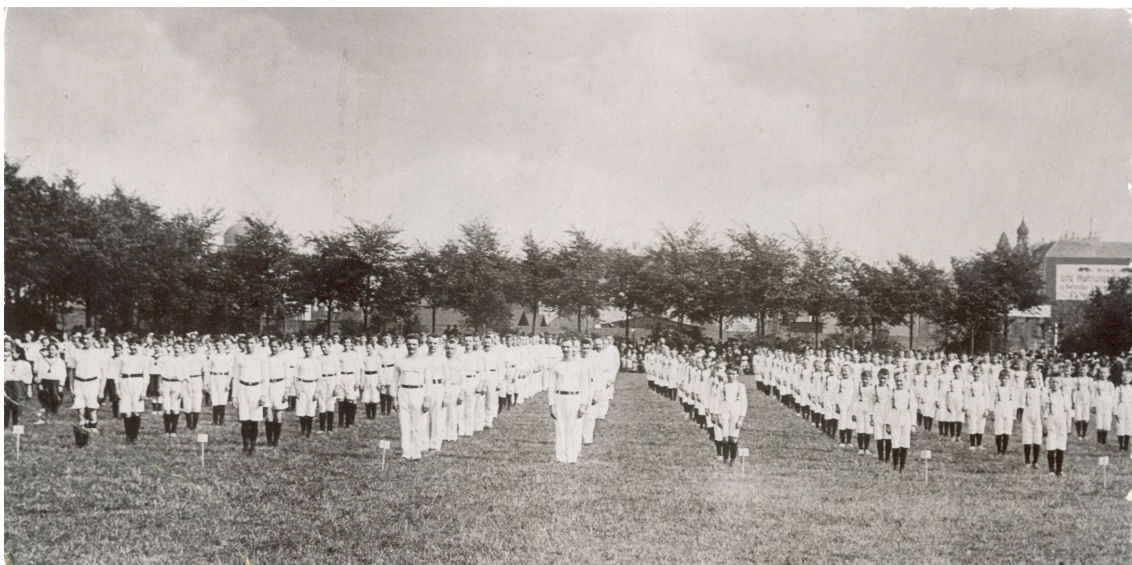
In Germany, sports, meaning gymnastics and physical exercises concerning the human body, developed mainly during the second half of the nineteenth century. In order to be able to pass on the information about the positive effects of sports to the people,

seminaries for gymnastic teachers were first established in Prussia, Württemberg, Bavaria, Saxony and Baden. Teachers were taught the importance of this new topic with the assignment to pass on that information. The professor Otto Heinrich Jäger, who was head of the school for gymnastics education in the department in Stuttgart, as well as the professor Konrad Koch from Braunschweig can be seen as pioneers in the field of sports education in Germany. Professor Koch was the first to introduce the soccer game to German schools. Gymnastics was the umbrella term for everything that had to do with physical movements and games in physical manners, as sports is nowadays. This includes all physical exercises, competitions and games of any sort. (Güllich & Krüger, 2013, p. 11)

This set the foundation to the gymnastics philologists Hugo Rothstein and Adolf Spieß. Mr. Rothstein was the head of the main gymnastics center in Berlin and Adolf Spieß led the education of gym teachers in Darmstadt. Both accomplished the establishment of gymnastics as an own class of education at schools and made the topic transparent and popular within the public and academic surrounding in Germany. (Güllich & Krüger, 2013, p. 11)

Although this setting did not provide sports education as a science to be studied at universities, the idea of being physically active to increase the overall performance of the human being was born.

At this point in time, the physical education and the performance of physical exercises was often carried out in large groups, as they seemed to have a great influence on the psychological ways of functioning of the individual human being. This is also shown in the following picture.



ill. 1: Schauturnen des TV Jahn Neukölln auf dem Hertzbergplatz 1912.

Source: Nippe, 2013.

As illustrated above, it can be seen that a large number of people are performing exercises in a structured manner. The picture shows a presentation of the sports capabilities of all individuals together, sort of like we would see a large team nowadays.

Growing since the beginning of the twentieth century, more and more institutions have arisen to offer the people, already convinced of a growth in personal performance, the opportunity and places to pursue sports activities in their recreational time. It took until the 1970s for sports to be acknowledged for what it is and it was subsidized in different ways to be able to provide enough well taught athletes for the Olympic games in Munich in 1972. (Güllich & Krüger, p. 11)

But since the development of sports interest until the 1970s, there were a lot of people taking on the role as an influencer in that field. The next chapters demonstrate a few of these sports influencers.

### **3.1 Leni Riefenstahl**

Leni Riefenstahl, born in August of 1902 in Berlin, was a German filmmaker and actress. She started out studying the art of painting and commenced dancing afterwards. She was very successful and famous for her dancing skills, but had to change her career plans due to an injury in her knee. Not wanting to let her injury drag her down, she became famous worldwide as an actress, movie director, film producer and photo reporter. (Leni Riefenstahl Produktion, 2000-2003)

As mentioned above, sports had been around for quite some time before Leni Riefenstahl was born and took professional interest in dealing with that subject. Although she could not be part of the sports community as an athlete anymore, due to her knee injury, it seems though, that she had a large influence in turning a leisure time activity into a popular topic for men and women equally.

The Olympic games of 1936 that were held in Berlin, gave Leni Riefenstahl the opportunity of dealing with a topic that through her dancing career, she was interested in from the beginning. This gave her the chance of still being part of the sports community, even though it was from a different perspective.



ill. 2: **Olympia – Fest der Voelker.**

Source: Leni Riefenstahl Produktion 2000-2003.

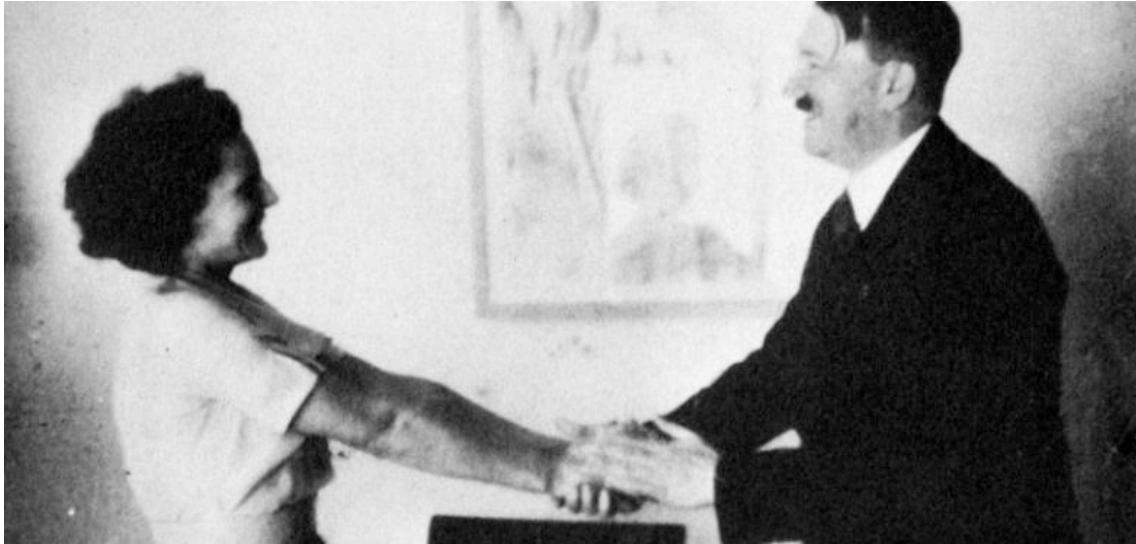


ill. 3: **Olympia – Fest der Schönheit.**

Source: Leni Riefenstahl Produktion 2000-2003.

As can be seen in the two pictures above, Leni Riefenstahl produced two movies, “Olympia – festival of the peoples and festival of beauty”, both concerning the Olympic games 1936 in Berlin. The two movies were finalized in the year of 1938 and aired on April 20<sup>th</sup> 1938. Ms. Riefenstahl was very successful with her movies and they reached worldwide popularity. She received the highest awards. 1937 she won the gold medal in Paris. One year later she won the first prize of Venice as the best movie worldwide and in 1939 the Olympic diploma of the International Olympic Committee. In 1956 the movies were even classified as one of the top ten movies of the world by the United States of America. (Leni Riefenstahl Produktion, 2000-2003)

This was an interesting development as Leni Riefenstahl as a person was disputed due to the time of the production and the influences she took on. Some of her work was classified as Nazi-propaganda and the point in instant of the first airing of these movies points toward that direction. The first airing took place on Hitler’s birthday. Riefenstahl was officially announced film director of the Third Reich (WeltN24 GmbH, 2010).



ill. 4: **Leni Riefenstahl and Adolf Hitler Shake Hands.**

Source: WeltN24 GmbH, 2010.

The picture illustrated above shows Leni Riefenstahl and Adolf Hitler shake hands in a friendly manner, but not every smile is smiled because of happiness, it might have had other reasons. Riefenstahl was often accused to be part of the Nazi regime but she was never prosecuted as such. “My life became a tissue of rumors and accusations”, Riefenstahl wrote in her memoirs. (Lawrence, 2016)

However, Leni Riefenstahl brought the Olympic games to the rest of the world and the image of healthy and physically fit young women and men spread. Apart from the rest of the world her work had an influence on the way people in Germany thought about physical activities and demonstrated that large goals can be reached through hard training.

Another example for achieving great goals is presented in the next chapter.

## **3.2 Arnold Schwarzenegger**

Arnold Schwarzenegger is a world famous bodybuilder and actor. He was born in Thal, Austria in 1947. In 1967, at the age of 20, he became the youngest human being ever to win the Mr. Universe title, a title that was held by competitive bodybuilders. Schwarzenegger turned himself into a product of sports and generated an international audience, becoming an icon to the people interested in bodybuilding and sports in general. As the field of bodybuilding did not develop for a certain time after he was born, he decided to move to the United States of America, where the trend already



started to emerge. Arnold Schwarzenegger won five Mr. Universe and seven Mr. Olympia titles during his active bodybuilding time after he went to the United States in 1968. He knew how to move the masses and set high goals for himself, not trying to persuade people that what he was doing was good, but opening their eyes when it comes to improving the individual human being. (Oak Productions Inc., n.d.)



ill. 5: **Arnold Schwarzenegger Pumping Iron.**

Source: Muscle & Strength LLC, 2005-2017.

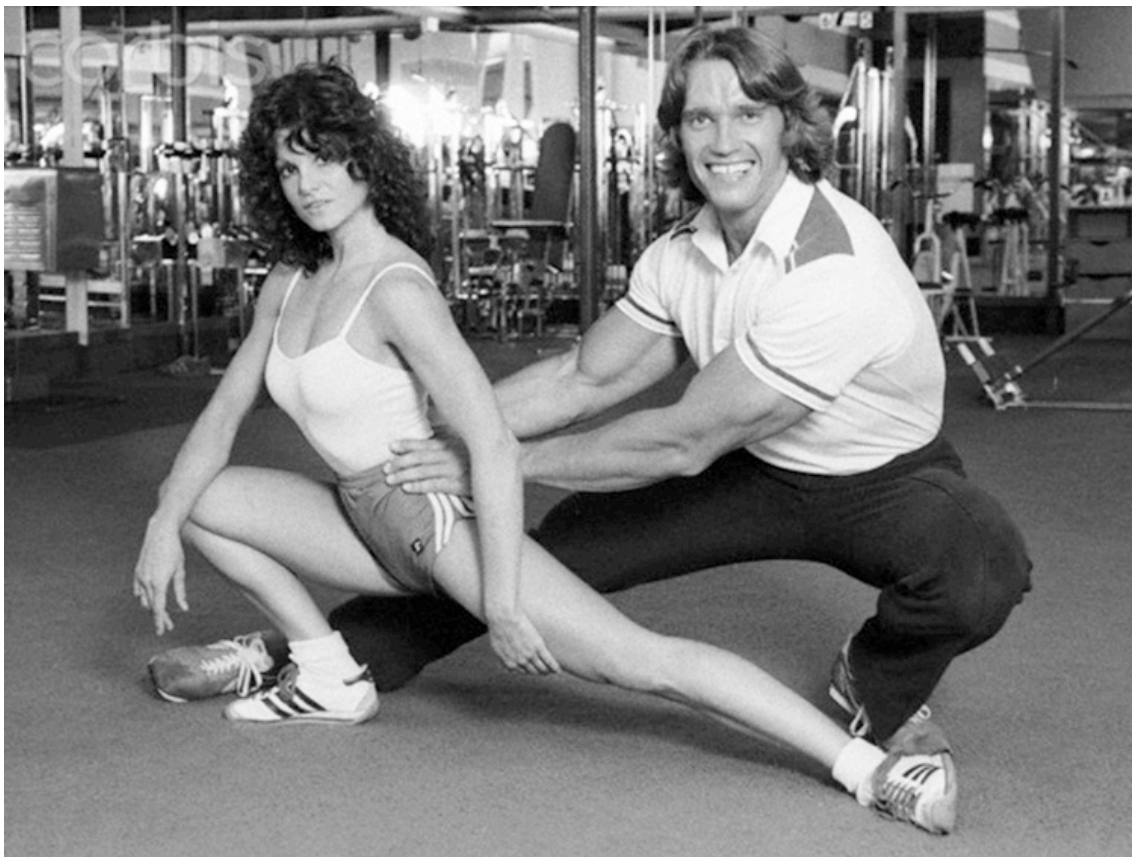
The picture of Arnold Schwarzenegger demonstrated above, shows him at the fitness studio or gym as it is mostly called in the United States. Schwarzenegger did not have an easy time growing up. His father Gustav was said to be an alcoholic in the service of the police as a chief. On top of that, Gustav Schwarzenegger, who as well as Leni Riefenstahl was said to be a part of the Nazi Party, had a second son who he seemed to favor over Arnold. Gustav abused Arnold in form of beatings and intimidations. He compared him to his other son and made fun of Arnold and his dreams of becoming a bodybuilder. (A&E Television Networks LLC, 2017)

This could have strengthened Arnold's wish and determination to fulfill his dreams in the pursuit of becoming a professional bodybuilder and moving to the United States of America, where he saw the platform for that intention.

Only three years before Schwarzenegger moved to the United States, Joe Weider created one of the first bodybuilding events, the Mr. Olympia competition amongst bodybuilders. That was the grappling hook Schwarzenegger had been looking for all throughout his youth. He became Weider's protégé and said: "He was the godfather of fitness who told all of us to be somebody with a body. He taught us that through hard work and training we could all be champions." (Bodybuilding.com LLC, 2016)

Influenced by the positive turn in his life, Arnold Schwarzenegger himself became an idol of fitness to people. "Equally significant, Schwarzenegger, who had immigrated to the United States in 1968, helped propel the sport into the mainstream, culminating in the 1977 documentary, *Pumping Iron*, which tells the tale of Schwarzenegger's defense of his Mr. Olympia crown." (A&E Television Networks LLC, 2017)

Having established a name for himself in the field of fitness, Schwarzenegger started working with women in order to show that the scene of bodybuilding was not limited to men. Schwarzenegger stood not only for bodybuilding itself, but the personal and mental health and satisfaction of the individual human being.



ill. 6: **Arnold Schwarzenegger Exercising with a Female Bodybuilder.**

Source: Greatest Physiques, n.d.



The picture that can be seen in illustration number six, shows Arnold Schwarzenegger exercising with a woman in a fitness studio. This was a large step, as men saw bodybuilding as a domain for men only up until a certain stage in time.

Contrary to the Mr. Olympia contest, which Joe Weider created in 1965 it took an additional 15 years for a contest to be designed for women, the Ms. Olympia. (Independent Digital News and Media Ltd., 2013)

### 3.3 Lisa Lyon



ill. 7: **Lisa Lyon Biceps Pumping.**  
Source: Greatest Physiques., n.d.



ill. 8: **Lisa Lyon Military Press.**  
Source: Greatest Physiques., n.d.

Lisa Lyon was one of the first and most successful female bodybuilders of her time. She was born in 1953 in Los Angeles, California. At the age of 18 she started studying at the University of California where she developed a large interest in Kendo, which she started practicing. (Greatest Physiques, n.d.)

Kendo is a modern version of the classical swordfight technique of the Samurai, where the fight ended deadly at least for one of the participants. Since the modern development of Kendo, the rules have changed and both participants leave the fight alive. This is due to the change from real Japanese Samurai swords called Katana, to bamboo swords called Shinai. (Deutscher Kendo Bund e.V., 2015)

After practicing for a couple of months Lyon realized that she was physically not strong enough to compete in her group of training. In order to improve in strength, she entered Gold's Gym, a fitness studio, which was managed by a friend of hers and started exercising. (Everts, 2009, p. 109)

The pictures seven and eight from the previous page show Lisa Lyon working on her body. Picture seven shows her exercising her biceps and improving her lifting strength. The picture marked with the number eight demonstrates that she used to work out by doing combined muscle exercises to strengthen her upper body, covering the stomach, the chest, the shoulders, her triceps and the top part of her back.

During that point of her life, she saw an advertisement for the IFBB, the International Federation of Bodybuilding and Fitness. With her goal set on taking part in the Women's World Pro Bodybuilding Championship and winning, she trained as hard as she could. On her way to the championship, she took part in the AAU Junior Ms. America, the Amateur Athlete Union, where she came out third place. After constant exercising she then took part in the IFBB Women's World Pro Bodybuilding Championship and impressed the judges with her body. It was then, in 1979, that she became the first female world champion of the IFBB. After achieving that goal she continued training but did not compete again. With her appearance and the won title she made history and the world had its eyes on Lisa Lyon. (Greatest Physiques, n.d.)

"[...] she was the first woman to promote female bodybuilding." (Everts, 2009, p. 110) In 1985, eight years after the success of Arnold Schwarzenegger's "Pumping Iron" movie a second movie "Pumping Iron II: The Women" came to the cinemas, demonstrating that the era of exclusively men working on their bodies had come to an end. Lisa Lyon was not featured in the movie as she was not as muscular as the presented women in the movie, but it is said that through her advance in bodybuilding from the start, she had a great influence in the decision making of the production. (McGough, 2014)

“Lisa also sought out top-name photographers like Helmut Newton and Robert Mapplethorpe, and their photos of her were the introduction many people had to the aesthetically developed muscular female body.” (Schwarzenegger, 1985, 1998, p. 45)

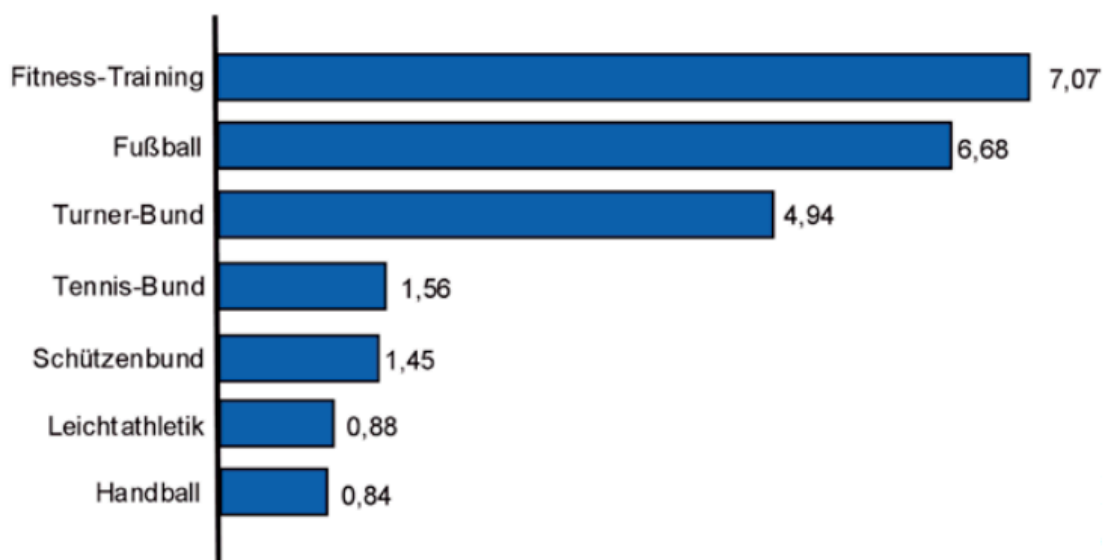
As mentioned before, Lisa Lyon exercised at Gold’s Gym in Los Angeles, California. To demonstrate the close connection between Arnold Schwarzenegger and Lisa Lyon, the picture in illustration number six in chapter 3.2 shows Arnold exercising not with just any woman, but with Ms. Lyon.

After having mentioned important influencers to the world of sports, the next chapter will demonstrate the resulting setup of fitness studios in Germany.

## 4 Fitness Studios in Germany

In comparison to former times where physical health was needed to fight man versus man wars, fitness in combination with healthy nourishment transferred to become a part of a healthy lifestyle. But how exactly is the structure of fitness studios nowadays and does it meet the needs of the individual German inhabitant?

According to the DSSV (Deutscher Sportstudio Verband), the German fitness studio association, the fitness studio industry surrounding has increased during the last two decades.



ill. 9: **Popular Movement Fitness.**

Source: DIFG e.V., 2010.

The statistic from 2009/2010 shown above, gives an insight of the number of people being physically active within Germany. The numbers behind the bars represent the number of people exercising in different ways and is given in million. It can be seen that 7.07 million people are signed up for fitness studios, which shows that almost every tenth person in Germany is working on becoming or staying fit and taking care of their personal health.

Refit Kamberovic, the CEO of the DSSV says: “Der Wunsch der Menschen, sich sportlich zu betätigen beziehungsweise eine aktive Gesundheitsvorsorge zu betreiben, beflügelt die Fitnessbranche, was nach unseren Prognosen 2017 in 10 Millionen Mitglieder in deutschen Fitness- und Gesundheitsanlagen münden wird“. (free translation: the wish of the people, to participate in sports respectively taking active measures towards preserving health, inspires the fitness industry, which according to our prognoses for 2017 will result in ten million members of German fitness studios.) (Deloitte GmbH, 2017)

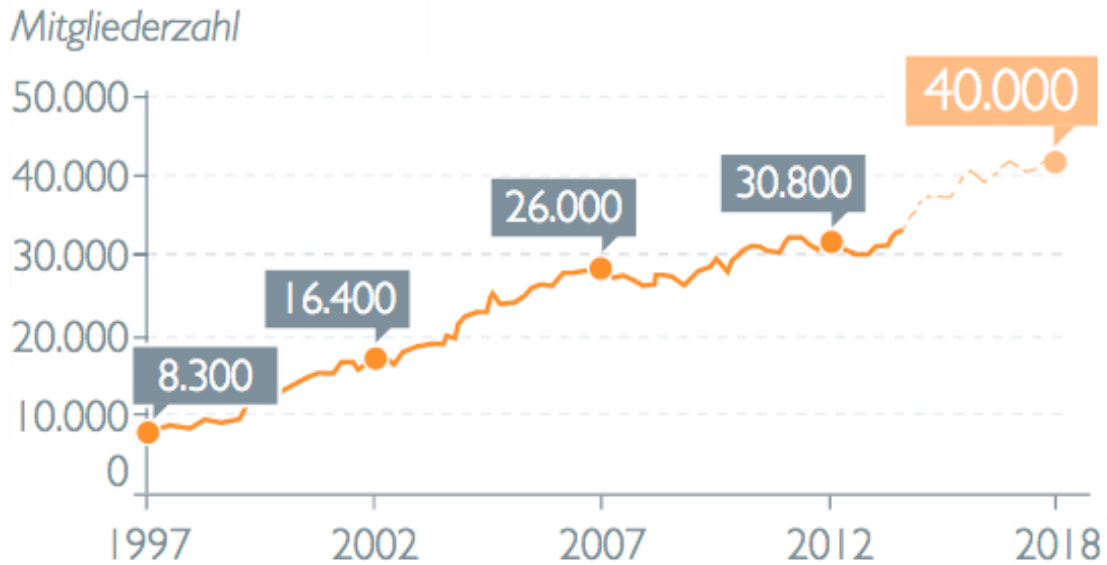
After having secured that information, it is necessary to look at the different fitness studio offerings within Germany, which will take place in the following chapters. To assure a certain comparability, only fitness studio chains were taken into consideration.

## **4.1 Premium Fitness Studios**

There are several different fitness studio chains and individual fitness studios in Germany competing on multiple levels within certain price ranges. In this chapter two of the premium fitness studios are listed.

One of the premium fitness studios in Germany is the MeridianSpa. The MeridianSpa opened its doors in 1984 in Germany and is situated in eight locations within the country. The fitness studio is not only there for physical fitness, but for a general wellbeing of the individual, offering workout areas, cardio devices, several fitness classes, individual exercising help by professionals and a large wellness area with saunas, massage treatments and swimming pools.

The following graph demonstrates the number of members since the end of the 1990s up to a prognosis for the upcoming year.

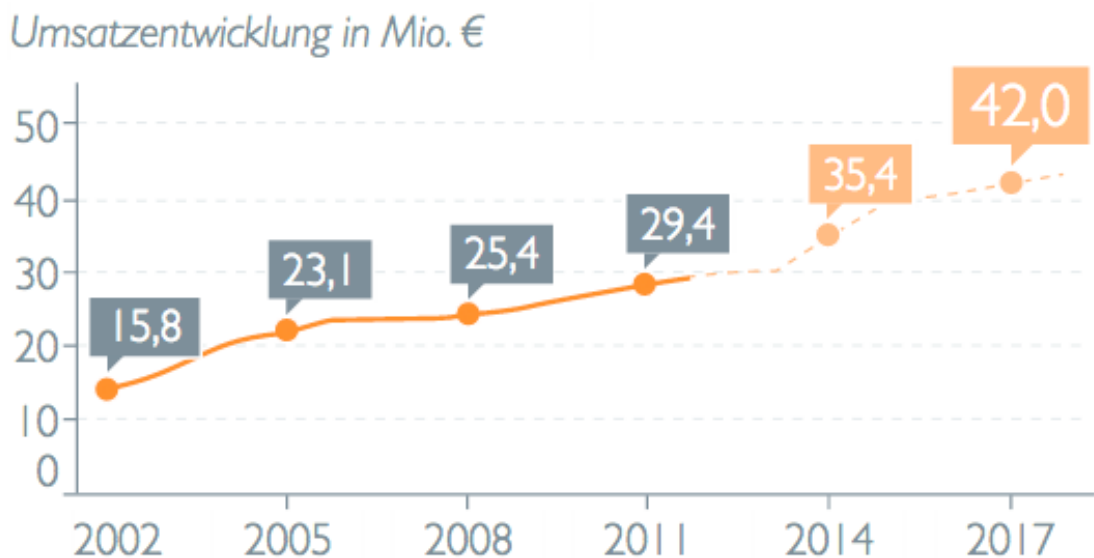


ill. 10: **Amount of Members.**

Source: MeridianSpa Deutschland GmbH, 2013.

According to the graph shown above the member numbers of the MaridianSpa have changed a lot during the last 20 years of the existence of the fitness club. From counting 8.300 members in the year of 1997, the numbers have more than quadrupled until today. The contracts between the MaridianSpa and its members are signed in a yearly manner and provide the individual with an all-inclusive package when it comes to the use of the studio's amenities. The price starts at 92 euros per month after entering the club for an additional entrance fee of 100 euros (Oberhuber, 2016).

Due to the rather high price that needs to be paid per month, one would assume the member numbers to stagnate at a certain point, but that does not seem to be the case.



ill. 11: **Sales Trend in Million Euros.**

Source: MeridianSpa Deutschland GmbH, 2013.

The graph above marked as illustration number eleven, gives an impression of the sales trend of memberships of the MeridianSpa from the year 2002 until the current year of 2017. It shows that although the monthly rates are one of the highest within Germany, it does not necessarily mean that the climax is already reached, but rather leans toward the direction of further development.

As a second example of a premium fitness studio chain, the Aspria comes to mind. The Aspria counts to one of the most exclusive fitness studios in Germany. Not everybody can become a member of the Aspria clubs. Aside from two locations in Hamburg, there is one in Hannover and one in the capital of Germany, Berlin (Aspria Holding BV, n.d.). In order to become a member of the exclusive club, one has to apply to the Aspria. After the potential member is declared suitable to the club, she or he signs a contract to pay a membership fee of 125 euros per month (Oberhuber, 2016). In this surrounding bodybuilding is not the focus of the facility. It is more about offering a health protection plan to the customer working on individual needs and urges. The CEO of the Aspria, Brian Morris, even says: "Wir sind kein Fitnessstudio". (Free translation: We are not a fitness studio) „Uns liegt vielmehr die Gesundheit der Club-Mitglieder am Herzen.“ (Free translation: We are more interested and concerned with the health of the club members.) This shows that the focus of the individual studios varies which might dictate the atmosphere within those studios. (Schönege, n.d.)

Aside from diversified wellness opportunities, these clubs offer lounge areas to relax, meet other members or even work, due to a wifi system available to the members. The MeridianSpa as well as the Aspria stand representative for several other fitness studios in this price range and class throughout Germany.

## **4.2 Semi-Premium Fitness Studios**

Simultaneously there are fitness studios in Germany, which offer a similar program to their members. These are clubs in a medium price range, costing around the half of the previously mentioned fitness studios in the premium segment. In this case Kieser Training was chosen as one of the two represented clubs within the semi-premium fitness studio segment of this research paper. In the following illustration, the different locations of the Kieser Training fitness studios can be seen distributed throughout Germany.





ill. 12: Locations Kieser Training.

Source: Kieser Training AG, n.a.

Kieser Training contains 113 training locations in Germany. Similar to the premium fitness studios, Kieser Training focuses on the health aspect of physical exercises. Before starting training at one of the offered locations, a body check is done to analyze the needs and goals of the individual person. Following that an individual plan of exercises is constructed and checked up upon during the different stages of training. (Kieser Training AG, n.d.)

Contrary to the premium fitness studios, which seem to offer the overall package when it comes to the well being of the human body, Kieser Training does not offer a wellness area. The concentration rests on the core strength of the body and the best possible solutions when it comes to reaching or preserving a healthy living.

Starting at 45 euros per month the membership rate is placed in the middle of the price segments offered by the fitness industry in Germany (Oberhuber, 2016).

As second fitness studio provider within the segment of semi-premium fitness studios, Fitness First plays a major role in the fitness industry. Established in 1993 in Great Britain, Fitness First is the largest fitness studio chain worldwide. With around 80 locations in Germany, Fitness First offers vast varieties of contracts and training opportuni-

ties to its clients. (Fitness First Germany GmbH, 2016) The contract prices vary from 45 to 130 euros, depending on the possibilities included in the fitness contract. (Oberhuber, 2016)

The different programs offered, go from exclusively using weights and training appliances, to also using fitness classes and, depending on the location, also providing a wellness surrounding to the customer. Using different locations within the Fitness First environment also results in a higher monthly contribution. Therefore, the setup of Fitness First can be understood as a setup offering a standard, intermediate and a premium package all by itself. At the company of Fitness First those different propositions to the customer are defined as “Lifestyle”, “Platinum” and “Black Label” clubs. (Fitness First Germany GmbH, 2016)

The prices concerning the different levels of membership seem to be not set in stone though. Personal research has shown that the prices are a matter of negotiation. Depending on recommendations and special offerings the prices may go down as far as 25 euros per month. This leaves the potential clients with a certain non-transparency, which could leave an insipid aftertaste.

### **4.3 Standard Fitness Studios**

As a third area within the fitness studio surrounding in Germany, there are the standard fitness studios. These studios seem to be popular due to the fact of good distribution of prices combined with offerings. Contrary to the previously named categories of fitness studios, the standard studios do not offer any kind of wellness areas equipped with spas, saunas or swimming pools.

One example for a standard fitness studio is FitX. The FitX Deutschland GmbH, founded in Essen, entered the German fitness market in the year 2009. With its 49 locations within the country the company provides an average amount of fitness studios compared to the competition in Germany. (FitX Deutschland GmbH, n.d.) With a monthly payment of 15 euros, the company offers its members the lowest rate in this ranking so far, keeping in mind that there are no wellness amenities. Aside from that, FitX has a lot to offer to its clients besides the low monthly rate. The following picture gives a list of areas within the fitness studios of FitX, which are provided. (Oberhuber, 2016)





ill. 13: Our Training Areas.

Source: FitX Deutschland GmbH, n.d.

Illustration 13 gives an overview of the amenities to the client of FitX. Aside from the large training area providing a variety of exercising devices, there is a cardio zone with rowing machines, different sorts of treadmills, spinning fitness bikes and similar. As one of only a few companies within the German fitness industry at this price range, FitX offers a course room, where different classes are held, in which the members can participate. This is already included in the monthly price of 15 euros. Furthermore, one part of the studios is equipped with weights for lifting in all different shapes and hefts. Focusing on to the training area, there are devices setup in a circle to be exercised upon one after the other, to focus on specific body parts and muscle zones. As another service, which is rare at this price level, a separated area for exercising is provided to the female members of FitX, where a more private climate is provided to the individual. The seventh zone within the fitness studios is the free exercising area. This area is constructed and equipped in a way that the sportswoman or sportsman uses the own bodyweight to exercise linked muscles in the human organism. As well as in the fitness studios in the previously mentioned categories, FitX provides new members with exercising schedules and introduces the fitness studio. Help of the trainers can be expected at any time. (FitX Deutschland GmbH, n.d.)

The second provider of fitness studios on this price level to be named in this research paper is the fitness studio chain with the most members of all fitness studios within Germany, McFIT. The McFIT company was founded by Rainer Schaller in the year 1997 in Würzburg, Germany, and spread throughout the country and the rest of Eu-

rope, to now reach a membership number of 1.4 million in 243 locations. (McFIT Global Group GmbH, n.d.)

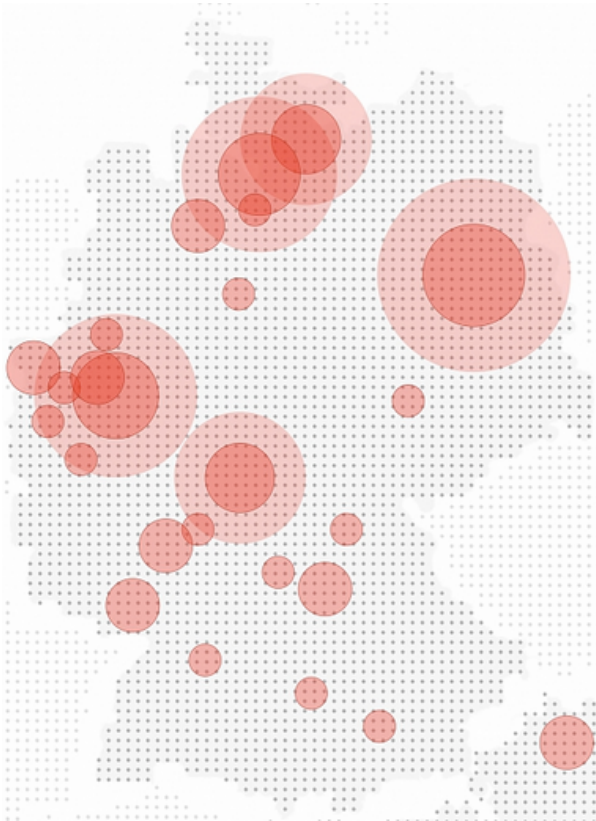
169 of those 240 locations are said to be in Germany, which lets the company provide a good reachability to the members (Nadine Oberhuber, 2016). As well as FitX, the McFIT fitness studios are available 24 hours per day. This around the clock opening service is not provided by the premium or semi-premium fitness studio companies, but gives more potential customers the possibility of fitting a training session into their daily routines, no matter how they are structured. Contrary to FitX, McFIT does not offer any training classes performed in groups within their studios. Aside from that the concepts of the two direct competitors are similar. McFIT offers the same exercising devices and cardio surroundings. Although missing the extra area of class exercises, McFIT asks for a monthly contribution of 19.90 euros of its customers. (McFIT Global Group GmbH, n.d.)

Probably having noticed the difference to the competition, McFIT had to think of new ways of securing potential and existing clients within this price level. In the next chapter, a possible method is listed.

#### **4.4 Low Cost Fitness Studio**

Undercutting the competition in the German fitness studio surrounding, the High5 Sports GmbH was created in 2015. It is a subsidiary of McFIT, which was created to have an even bigger reach and enter a new field of user experience when it comes to providing service in connection to training possibilities. The High5 gyms are equipped the same way as the previously mentioned fitness studios concerning exercising devices, free weight lifting areas and cardio zones. They do not provide any wellness areas, group course rooms of further service opportunities though. The fitness studios seem to be similar to the setup of McFIT, but there are major differences when taking a closer look. When becoming a High5 member in one of the studios, no further advice is given by the staff when it comes to personalized training plans. The gym itself is presented and the new member can start exercising right away. When it comes to the training though, the staff must not give any advice on how to exercise or perform certain workout techniques. This is due to the fact that the staff does not contain of schooled trainers, but is mainly there to manage the corresponding location. (High5 Sports GmbH, 2015)

The High5 Sports GmbH has 30 fitness studio locations within Germany. Memberships start as low as 9.90 euros per month. (Oberhuber, 2016)



ill. 14: **High5 Fitness Studio Locations.**

Source: High5 Sports GmbH, 2015.

Illustration 14 shows the locations of the High5 fitness studios within Germany and parts of Austria. It can be seen that the concentration of studios mainly focuses on larger German cities, overall giving McFIT the chance of creating its own, self-controlled competition. Different forms of contracts allow for members of High5 to not be limited to the one location or even have access to all locations within the company, but to have the chance of visiting all McFIT locations in addition to that. This form of contract would result in a monthly payment of 19.90 euros for the member. (High5 Sports GmbH, 2015)

After having analyzed all sections of the topic point four, Fitness Studios in Germany, it can be said that there is a certain ground offering to the potential member of a fitness studio. Having the possibility of lifting weights, using exercising devices and cardio training tools seem to be this ground offering. Aside from that, a certain service cannot be expected at every company. Having trainers around to ask for advice or new possibilities of training creates higher prices to the fitness studio operators, but also an allegedly better user experience for the member. All mentioned fitness studios have an

admission charge, which resembles the amounts of the monthly rates. After that the rates often depend on the type of package that is chosen, or varies from location to location, like it is with the company Fitness First. The duration of the contract as well is a factor that influences the according rates. Overall there are a lot of additional factors like opening hours or special offerings to potential members that need to be taken into consideration. But how do the women and men throughout Germany determine where they want to exercise and which fitness studio within the industry they should choose?

The next chapter analyzes the opposite side of the industry, not the fitness studio side with what it has got to offer, but the side of the client with her or his needs and wishes, when it comes to choosing a fitness studio and including exercise slots into a daily routine.

## **5 Survey: How Fit is Germany**

The goal of this chapter is the description of the empirical study conducted in this paper. It is necessary to test the hypothesis that the setup of the fitness industry is contemporary and meets the needs of the people of modern day Germany. In the following an evaluation and interpretation of the results delivered by the questionnaire takes place. The starting point of the research is the frequency of German inhabitants when it comes to practicing sports, and especially doing so in a fitness studio. It is to be determined which aspects of fitness studios influence the decision of people concerning their choice of location for exercising.

### **5.1 Methodical Approach**

“Survey research involves the collection of information from a sample of individuals through their responses to questions”. “[...] it is an efficient method for systematically collecting data from a broad spectrum of individuals [...]”. (SAGE Publications, 2017) The examination is ensued in form of an anonymized questionnaire created online. This questionnaire was created with the use of the Internet platform Google Docs and provided to a broad audience utilizing the social network Facebook. The questionnaire contains 15 questions and is held in German, due to the target group. At the beginning, demographic questions about gender, age, size of village or city lived in and the net monthly income were posed. Following that, the question whether the participants

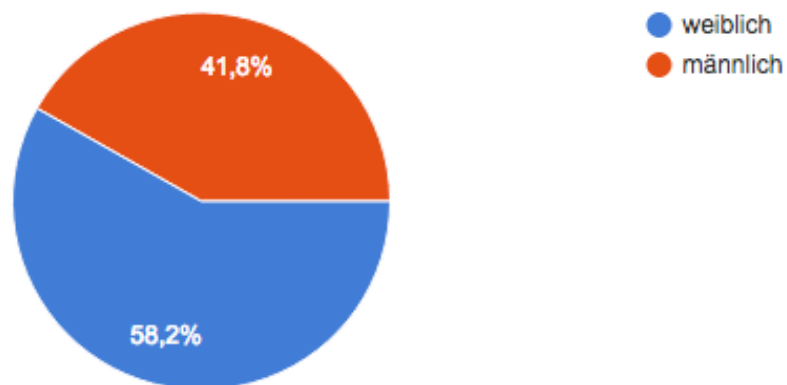
practice any sports at all, was crucial for the main part of the questionnaire. This way it was possible to provide a certain reliability for the further questions. The survey can also be found attached in the appendix. The possible answers to the questions were not created in an open manner, due to the fear of a loss in participation. In order to increase the motivation of the participants they were given three to four possibilities of response. In order to achieve a valid analysis of the results, one question asked for multiple answers. This supported an emphasis to represent the participant's tendencies. A detailed analysis and interpretation of the results is provided in the following chapter.

The questionnaire was available to potential participants for a period of one month. It was posted to Facebook company groups such as the Fitness First Germany group or Fitness22 – Health & Fitness Community and public Facebook pages of private people of interest like Sophia Thiel. In addition to that, all existing Macromedia Facebook groups were provided with the survey as well. Overall 122 people took part. The goal was to reach mostly people that share an interest in sports in order to expect more qualified results and getting to know the potential customers needs. Due to the positioning on an online social network, the goal was difficult to achieve from the beginning. An introduction to the survey was the only way to provide the participants with a hint towards its direction. During the survey it became obvious that the question about whether sports is done in general, was an essential exclusion question. A participation in the rest of the survey after answering with “no” could have led to false conclusions. For those answering with “no” there was a follow up question, asking for the reasons of not participating in any kind of sports. That result was informative because of the origin of the situation, whether the industry does not provide the desired or there is no desire to be part of the industry.

## **5.2 Analysis and Interpretation of Results**

The results for the individual questions of the survey are explained in the following with the help of diagrams. Amongst the 122 participants the graph below shows the distribution of gender.

## Du bist (122 Antworten)

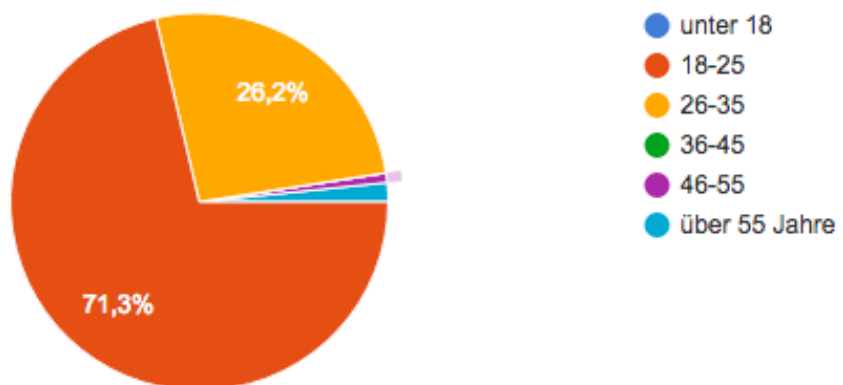


ill. 15: **Gender of Participants.**

Source: Own Illustration, 2016.

It can be seen, that 41.8 percent of the participants is male, while 58.2 percent is female. This equals 71 women and 51 men. All together were then obliged to give a response to the age of the individual.

## Wie alt bist du? (122 Antworten)



ill. 16: **Age of Participants.**

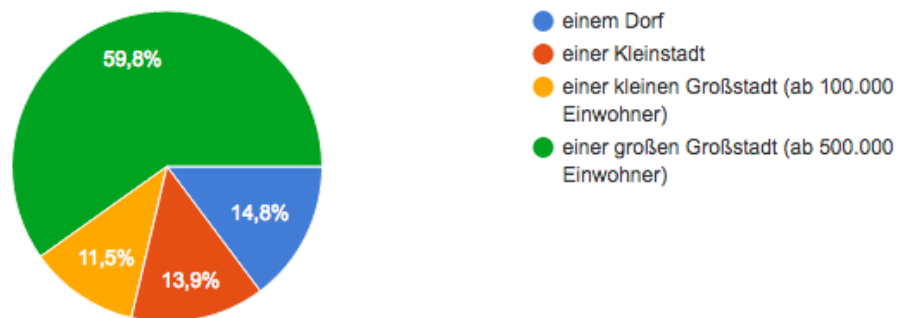
Source: Own Illustration, 2016.

Illustration 16 shows the distribution of the age of the participants of the survey. The majority of women and men lies between the ages of 18 to 25 years. This group sums up to 87 people and represents 71.3 percent of all attendees. None of them were under 18 years of age. The second largest group within all participants is the group between the ages of 26 to 35 years. This group covers 26.2 percent, which stands for 32 people. The next group was provided to the 36 to 45 year old. This assemblage did not receive any participation. Following that the ages 46 to 55 years represent a minority

with only one person being in that group. The last slot for participants beyond the age of 55 found two attendees. The distribution of the age within the survey can be concluded to be leaning extremely toward the young ages. This might be due to the choice of the publishing channel as well as the fact that the switch, when it comes the decision of developing to be physically active or not, is set in younger ages and then carried through life in an ideal case.

In order to be able to learn about the circumstances people practicing sports are confronted with, in terms of distance to potential fitness studios, the following question was pointed toward the place of residence.

### Du wohnst in (122 Antworten)



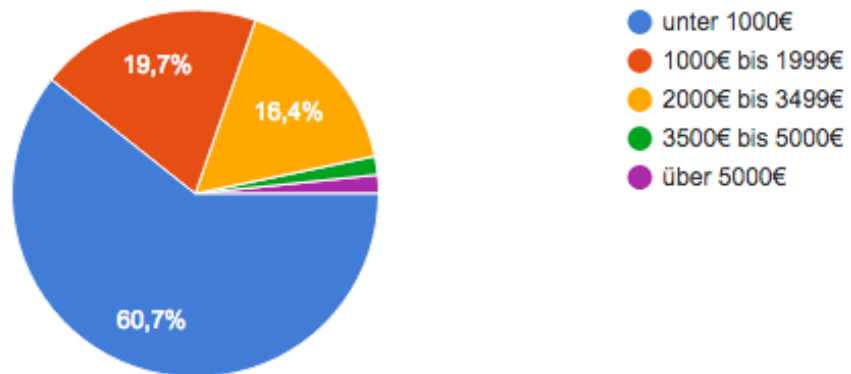
#### ill. 17: Place of Residence.

Source: Own Illustration, 2016.

As the actual location within Germany was irrelevant, the participants were only asked about the size, concerning inhabitants of the location they live in. By finding out about the place of living, it is possible to evaluate the effort of the individual to access sports facilities. The majority of the participants are situated in a large metropolis counting at least 500,000 inhabitants. This equals 73 people and overall 59.8 percent. Following that the second largest part of attendees live in villages. This part represents 14.8 percent. The villages are closely followed by small cities with less than 100,000 people. That part of the group is displayed in red and stands for 17 people, which is 13.9 percent. The minority of the participants in the survey lives in smaller metropolises having between 100,001 and 499,999 inhabitants. This minority is covered by 11.5 percent.

For the availability of information concerning the financial possibilities of the individuals partaking in the survey, the next question dealt with their net monthly income.

## Wie hoch ist dein monatliches Nettoeinkommen? (122 Antworten)



ill. 18: **Monthly Net Income.**

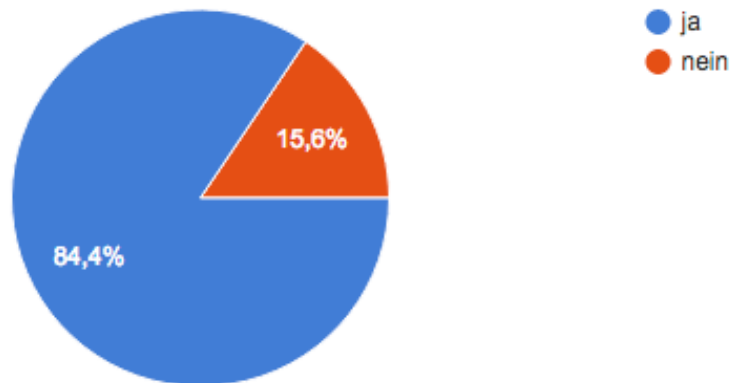
Source: Own Illustration, 2016.

Probably due to the fact that the majority of the participants is between 18 and 25 years old, most of them also stated to be equipped with a monthly income of under 1,000 euros, as can be seen on the graph in illustration number 18 marked in blue. 74 participants, who equal 60.7 percent, fall under this category. Taking its origin in the previously named reason, the next most earned net income showed to be 1,000 to 1,999 euros with 19.7 percent. Not far behind that the next category comes into place with 16.4 percent marked in yellow. These 20 participants have a net income of between 2,000 and 3,499 euros at their command. Only two of all attendees indicated to earn between 3,500 and 5,000 euros per month. This represents a minority of one point six percent. The same amount declared to have over 5,000 euros available. Both last named groups also seem to be described by the age and stage of life of the participants of the questionnaire.

After having covered the demographic questions, it was now time to get to the topic of finding out, whether the fitness industry in Germany meets the needs and wishes of the attendees of the survey. In order to divide the test group into people who practice sports and people who do not, an exclusion question was posed shown in the following illustration.



## Treibst du Sport? (122 Antworten)



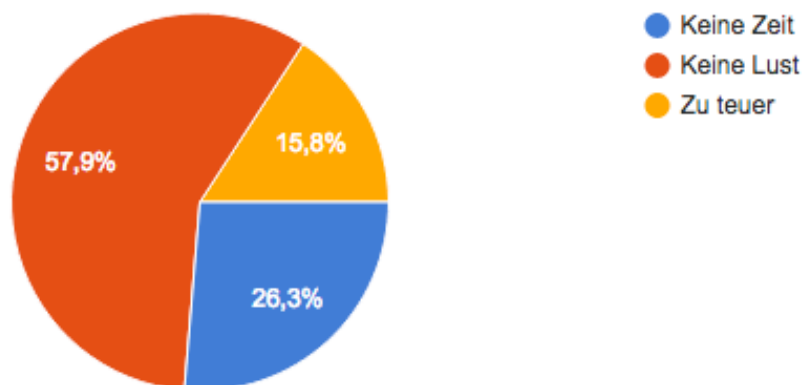
ill. 19: **Yes or No to Sports.**

Source: Own Illustration, 2016.

As can be seen on the graph presented in illustration number 19, the question whether the participants practice sports or not, gave a clear trend and represents a high active interest in physical exercises of different kinds. With 84.4 percent, 103 of the 122 answers stand for “yes”, marked in blue. The other 19, marked in red stand for a clear minority of 15.6 percent.

Only the ones having answered with “yes” were then forwarded to the increasingly concrete questions investigating the user behavior, when it comes to the topic of physical fitness. The 19 participants who answered with “no” were led to a follow up question, asking for the reason for not participating in any sports activities though, which is displayed next.

## Warum treibst du keinen Sport? (19 Antworten)



ill. 20: **Reason for no Sports.**

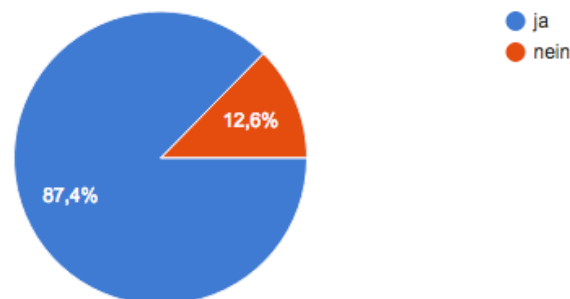
Source: Own Illustration, 2016.

Three answering possibilities were given, as can be seen in illustration number 20, namely having no time for sports, no inclination toward sports or sports being simply too expensive. In the survey, 57.9 percent stated that they have no inclination. This is the majority of the smaller part of the split test group. The individual reasons for not being interested were not asked during the survey. Following that a rather large number of people seem to not have any time to practice sports. Exactly 26.3 percent of the people not being physically active, name this as the reason of influence. Nevertheless, 15.8 percent of the 19 participants gave the answer of sports being too expensive to them, which is marked in yellow.

For the rest of the 122 initial attendees of the survey, the next step was their sixth question. The pursuing image shows its results.

**Der DSSV, Europas größter Arbeitgeberverband für die Fitness-Wirtschaft sagt in einer Studie: „Der Wunsch der Menschen, sich sportlich zu betätigen beziehungsweise eine aktive Gesundheitsvorsorge zu betreiben, beflügelt die Fitnessbranche, was nach unseren Prognosen 2017 in 10 Millionen Mitglieder in deutschen Fitness- und Gesundheitsanlagen münden wird“. Kannst du diesen wachsenden Fitness-Trend bestätigen?**

(103 Antworten)



ill. 21: **Study by DSSV.**

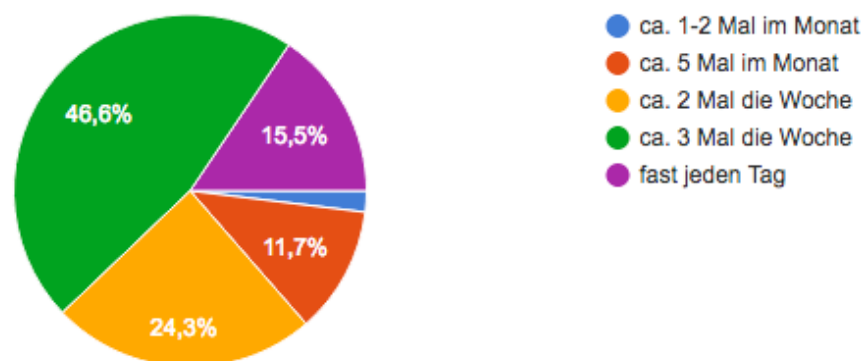
Source: Own Illustration, 2016.

The statement and question posed in the illustration number 21 is freely translated in the following. “The DSSV (German Sports Studio Association), Europe’s largest employer in the fitness industry states in a study: ”The wish of people, of being active in sports respectively participating in active preventative health care, inspires the fitness branch, which according to our prognoses will lead to 10 million members in German fitness and health centers in 2017”. Can you support this growing fitness trend?” Almost 90 percent of the participants, exactly 87.4 percent, answered with “yes”, declaring their support for the statement. Only 12.6 percent answered with “no”, showing that

they perceived the trend in a different way. The question gives disclosure on the topic of whether the fitness market is a progressive industry.

After having that clarified, the survey needed to collect information on how often the participants practice sports in of any kind and duration, in order to receive a measurement frequency and therefore the occupancy rate in fitness studios.

### Wie häufig treibst du Sport? (103 Antworten)



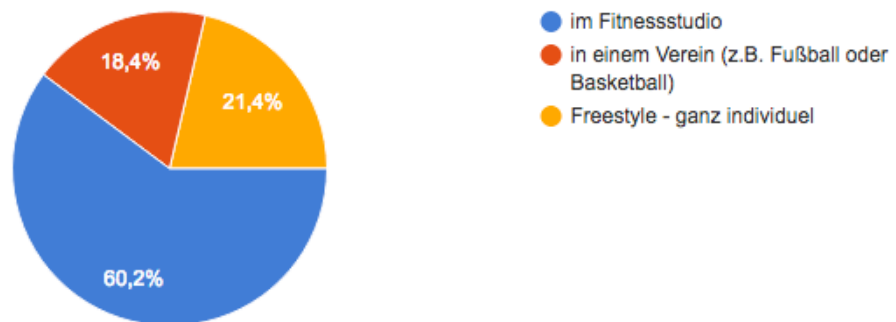
ill. 22: **Frequency of Exercising.**

Source: Own Illustration, 2016.

Starting with the least often, with one to two times per month, the result came to show that also the least number of participants have such a low frequency. This result, marked in blue, was given by two attendees, representing 1.9 percent of the group. Rising equally to the amount of times sports is practiced during a month, in this case around five times, 11.7 percent stated to be within that range, shown in red color. Twice per week, equaling in eight times per month, was the number of times 24.3 percent allegedly go and practice sports of some kind. The majority of the participants of the questionnaire are physically active around three times per week. It contains of 48 people representing 46.6 percent overall. The third most popular answer out of five possibilities, being practicing sports almost every day, was chosen by 15.5 percent. Looking at the graph, it can be concluded that the group, participating in the survey, has a rather high frequency, when it comes to being active in physical fitness.

To be more precise and steering toward information about fitness studios, the next question gave three different choices of answer.

### Wie treibst du Sport? (103 Antworten)



ill. 23: **Way of Practicing Sports.**

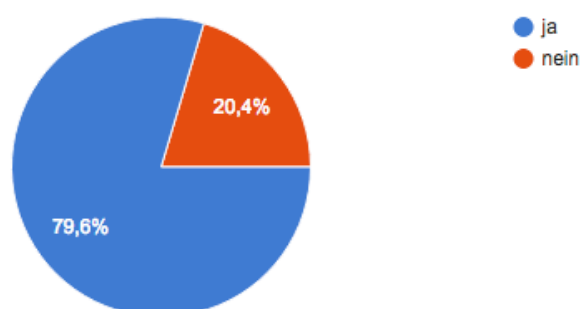
Source: Own Illustration, 2016.

The question shown in illustration number 23 is aimed at providing a number of people, who are exercising in fitness studios. Therefore, the fitness studio was one of the possible answers given to the participant. The information about the other two possibilities, being “in a club (e.g. Soccer or Basketball)” and “freestyle – individually”, is secondary to this research paper. That being said, 60.2 percent of the participants said to be exercising in fitness studios. This results in 62 of 103 people. As a third choice of answer, 21.4 percent state to be physically active individually, meaning outdoor running or free athletics at home for example. The rest of the group with 18.4 percent, are shown to do sports in a sports club.

As a next question the attendees of the survey were asked about their wish for freedom, when it comes to the situation of being attached to certain fitness studios.

### Würdest du je nach Angebot (z.B. bestimmte Kursangebote) gerne flexibel entscheiden können in welche Fitnessstudios du gehst und welche Übungen oder Kurse du für dich beanspruchst?

(103 Antworten)



ill. 24: **Flexibility Concerning Use of Fitness Studios.**

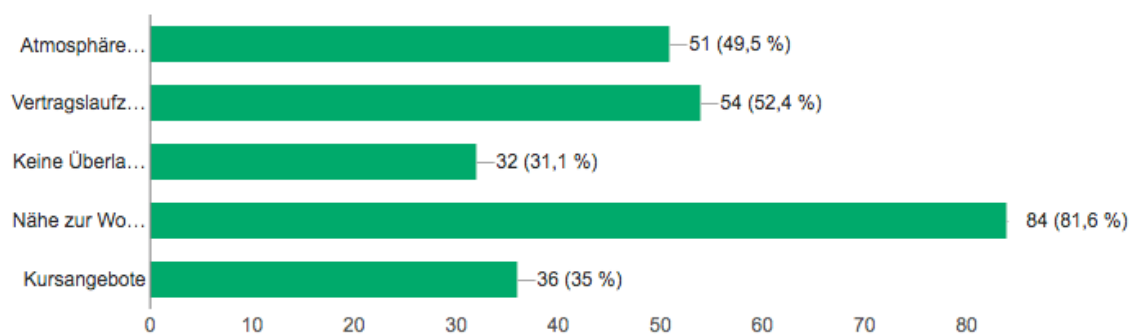
Source: Own Illustration, 2016.

In the following a free translation of the question shown in illustration number 24 is given. “Would you like to be able to decide in a flexible manner, which fitness studios to visit and which exercises and classes to choose, according to the offerings (e.g. certain course offerings).” The question was set up to examine the wish for more individuality concerning the use of fitness studios. Overall 82 people, equaling 79.6 percent of the test group, answered with “yes” marked in blue. The rest with 20,4 percent does not define that possibility as necessary.

After having asked about the wish for individuality when visiting fitness studios, it was essential to scrutinize the origin of the persons’ choice of supplier and location. The following question was designed to provide this information.

### Welches sind für dich die zwei wichtigsten Faktoren, die die Wahl deines Fitnessstudios beeinflussen?

(103 Antworten)



ill. 25: Influencing Factors.

Source: Own Illustration, 2016.

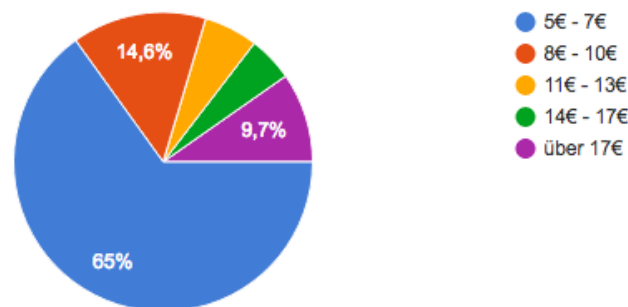
The participants were asked to choose the two most important factors that influence their choice of fitness studio. The five possibilities of response were the atmosphere in the studio, the length of the contract combined with the monthly fee, no overcrowding by too many members, the proximity to home or work and the course offerings. The graph in illustration 25 shows, that the location of the fitness studio plays the most important role to the participants. With 81.6, percent it exceeds the other preferences by far. The second most important factor can be seen to be the length of the contract and the height of the respective rate per month. Over half of all attendees chose this to have a large influence, resulting in 52.4 percent. This answer is shortly followed by the wish for a good atmosphere in the fitness studio. Furthermore, 49.5 percent seem to be influenced by outer influences within the studios and want to develop a certain feeling of comfort. Fourth and fifth in this ranking are the course offerings and the wish for no overcrowding. Here, 35 percent say that the course offerings play an important role in

the choice of fitness studios. Keeping this in mind, it has to be said that the information about which areas of those studios are utilized by the participants, was not asked, leaving it open whether people exclusively visit classes or lift weights. For those visiting the classes, it is comprehensible that course offerings play a major role. For 31.1 percent overcrowding of fitness studios is something that should be prevented. This could also be part of the overall atmosphere supplied as one of the responses. In retrospect, the importance of the duration and form of the contract with the fitness studios shows, that there should have been a question asking about the different types of contracts, in terms of cost and offerings.

Not having that information, the survey still provides information about the willingness of the physically active person, when it comes to paying for fitness studio offerings and visits. The following question helps clarify.

### Wieviel wärst du bereit für die flexible Nutzung verschiedener Fitnessstudios pro Besuch zu bezahlen?

(103 Antworten)



ill. 26: **Pay per Visit.**

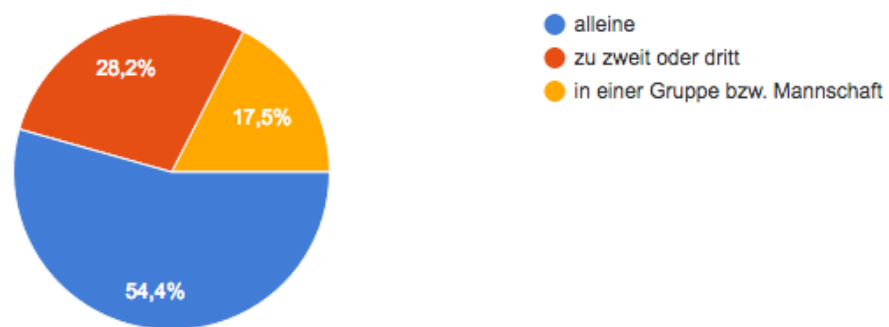
Source: Own Illustration, 2016.

The attendees of the survey were asked how much they are willing to pay per visit for a flexible usage of different fitness studios. As previously mentioned, the outcome of willingness to pay a certain amount might be affected by the rather low income of the young test group. The majority of 65 percent state to be willing to pay five to seven euros per time they visit a fitness studio. This is followed by 14.6 percent who find eight to ten euros affordable. Interestingly enough the third price category is the one of over 17 euros. Ten people equaling 9.7 percent of all participants said that sum to be a price they would be willing to pay. This can be seen marked in purple on the graph shown in illustration number 26. The rest of the group is divided into 5.8 percent for the eleven to 13 euros, and 4.9 percent for the 14 to 18 euro category. This points toward a high willingness to pay for individual visits to fitness studios in general. The height of the

payment might well depend on the offerings. Nevertheless, the number of times people visit fitness studios also influences the amount customers are willing to pay. At a certain point, it could be more sensible to choose a form of contract with specific fitness studios.

In order to be able to find out about the training habits of the attendees with regards to exercising by themselves or in different forms, the subsequent question was posed to the group.

### Wenn du dich sportlich betätigst, tust du dies dann (103 Antworten)



ill. 27: **Alone or Together.**

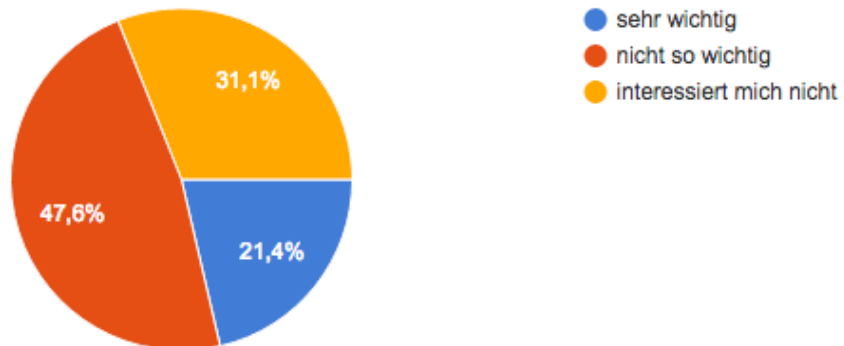
Source: Own Illustration, 2016.

Illustration number 27 shows the question about the manner, in which the participant exercises. It was designed to discover information about a possible need, of linking people active in sports to one another, in order to achieve an optimal user experience. The possible answers were, alone, in a party of two or three and in a group or team. The majority of all attendees, with a percentage of 54.4, stated to perform their physical exercises alone. Almost a third, with 28.2 percent, seem to be active in a smaller group of two to three people. This might be due to habits and support the motivation of the individual person. The lowest result was achieved by the answer of exercising in groups or teams. Only 17.5 percent fall within that category.

Directly linked to the question about the manner of practicing sports, the next question asked for the importance of the word of mouth concerning fitness studios by fellow sportsmen.

## Wie wichtig sind dir Bewertungen von Fitnessstudios durch andere Sportlerinnen und Sportler?

(103 Antworten)



ill. 28: **Fitness Studio Customer Rating.**

Source: Own Illustration, 2016.

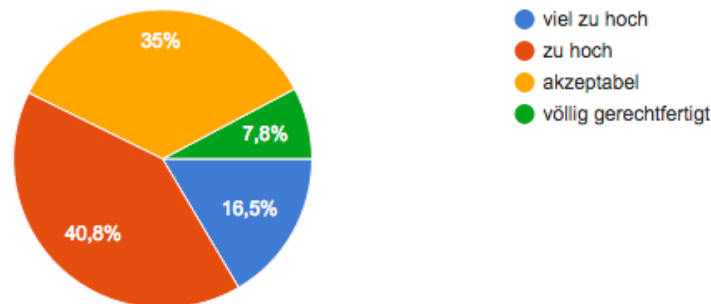
“How important are ratings concerning fitness studios by other sportspeople to you?” is a free translation of the question displayed in illustration number 28. It is posed in order to develop an idea about how groups could be formed and choices of fitness studios are made. Overall 69 percent of all participants seem to be thinking that those ratings would at least be nice to have. For 21.4 percent ratings are very important. Aside from that 47.6 percent state that ratings are not that important, leaving it open whether they would like to have them available rather than not. The rest of the test group with a percentage of 31.1 say, that they are not interested in ratings at all and therefore do not seem to be influenced by them.

Coming to an end of the survey a last question was constructed to receive another opinion on which price equals the limit of what people would be willing to pay for a membership in a fitness studio. In order to achieve a starting amount, a study from the German daily newspaper “Handelsblatt” was utilized.



Laut Handelsblatt zahlt der durchschnittliche Besucher eines Fitnessstudios in Deutschland 44,71€ netto im Monat. Im Verhältnis zur Anzahl deiner Fitnessstudiobesuche pro Monat, findest du den Durchschnittsbeitrag gerechtfertigt?

(103 Antworten)



ill. 29: Average Monthly Payment for Fitness Studio Membership.

Source: Own Illustration, 2016.

According to the “Handelsblatt”, the average visitor of a fitness studio in Germany pays 44.71 euros per month. The question to the participant was whether that price is justified correlated to the amount of times the individual visits a fitness studio. A minority of 7.8 percent finds the price to be totally justified. The part marked in yellow with 35 percent, stands for the people who think that it is an acceptable sum. The majority of attendees of the questionnaire with a total of 57.3 percent indicate that the amount of 44.71 euros is either too high or way too high, as can be seen in the graph shown in illustration number 29, adding the parts marked in red and blue.

The conclusion originates from the results of the executed survey as well as the presented setup of fitness studios throughout Germany.

## 6 Conclusion

At the beginning of the research for this paper, the question whether the setup of the German fitness studio industry meets contemporary needs of the individuals interested in practicing sports, was developed. Going through the development of knowledge about and interest for sports, examples for historical milestones are listed. After having analyzed parts of the historical background, the current setup of the German fitness studio environment is explained with the use of specific companies as examples. Following that, an empirical study was undertaken to provide information about the way fitness studios are visited nowadays and how the individuals set their preferences.

In conclusion of this paper it can be said, that the hypothesis of the setup of the fitness industry, being contemporary and meeting the needs of the people in modern day Germany, developed at the beginning and tested throughout the work, cannot be supported. The mixed result is explained in the following. Throughout the years, the fitness studio industry has established a functioning and growing environment for potential members. Several fitness studio chains and individual fitness studios stand ready for the customer's demand. The overall thought is the same, physical fitness. That is the one factor that all fitness studios have commonly to offer. By providing weights and exercising devices, the foundation for the possibility of training is set.

Studying the different previously listed fitness studio services and opportunities, it can be said that it is not easy to find the fitness studio most suited for the individual sports person. Some want the whole package making use of the wellness area, the free weight zone, the offered fitness courses, the personal consultations and the swimming pool for example. Others might only want to go to a fitness studio, which is not overcrowded, in order to use the cardio and some of the exercising devices. To meet and anticipate potential customers' needs, providing the areas and services they want, the fitness studios compete on many different levels. Taking a user journey through a visit in a fitness studio, many aspects are important. The opening hours of the fitness studios presented in this paper vary a lot. Not necessarily during daytime, as most of them have similar core hours, but especially when certain chains provide around the clock access to the studios. The physically active of the German people who work night shifts, have a completely different structure of a day for example. They could have a personal timeslot of two hours for exercising available, starting at ten p.m. for example, which would prevent them from having the chance of becoming a member at all chains, only providing access during the day. Having clean bathrooms and changing facilities should be standard, which it seems to be for most of the fitness studios. Not all provide free showers or showers in general though. Offering a hygienic environment becomes more elaborate depending on the occupancy rate.

Once these basic factors are reviewed, it would be suitable and convenient to have access to a fitness studio within the surrounding of home or the place of work, in order to be able to include the physical exercises into the daily routine. Having to commute long distance between the habitual areas of life and the fitness studio can cause barriers on multiple levels. Another main point is the membership fee, which in most cases is paid on a monthly basis. Different packages of offerings result in different prices, between and even within fitness studio chains.

Potential members of fitness studios throughout Germany are offered several opportunities to be physically active and pursue preventative health. One may ask how these people distribute their emphasis, when it comes to covering all personal preferences. Based on the outlined findings, the perspective and opinion of the test group of the survey helped to arrange for a better understanding and whether the fitness studio industry is contemporary.

Studying the previously presented survey conducted for this paper, it can be said that the participants are mostly at young ages between 18 and 35. This must be the reason for the outcome that the majority of earns less than 2,000 euros per month. The gender wise almost equally distributed test group mostly lives in larger cities starting at 500,000 inhabitants. Being at a young age with a limited amount of money at hand, puts the women and men in the position of vast choice. Starting considerations for fitness studios, the potential members have to go research individual conditions and try to match them with the personal preferences. Flexibility concerning use of different locations of fitness studios is limited to non-existent. The less flexibility is offered, the lower the monthly payments seem to be. This flexibility does not only concern the location of exercise, but also the membership contract conditions. The longer the contract, in most cases up to 24 months, the lower the monthly rate to the member. This leaves little room for flexibility in the use of different offerings.

Having established the information that almost 85 percent of all participants perform physical exercises of some kind, and the fact that over 60 percent of that group said to be members of fitness studios, the findings shown in illustration 21, support and exceed the study done by the DSSV. In this case, under all previously named conditions of the test group, it even achieved six times the number of people that were listed in the study. This might also be due to the choice of publication channel for the questionnaire but nevertheless shows for a lot of potential to exist when looking toward the future of the German fitness studio industry.

As modern life has a fast pace, a certain flexibility is wished for by the person being physically active in fitness studios. One of the most important answers was the one concerning the flexibility when it comes to the use of different fitness studios according to the offerings. Around 80 percent of all participants beyond the exclusion question, seem to hold the urge of being provided with such possibilities. This opens thoughts toward a new system in the fitness industry, offering the potential member exactly what is wanted. It is time for fitness studios to go beyond being held up with member num-

bers and how many studio locations are offered. This way of counting and competing against other chains in the same field of service is outdated and does not reflect the wishes of the current generation of sportspeople. Not to mention that the urge for flexibility will accordingly increase, given that life itself seems to be accelerating. Flexibility is needed in order to distribute time the way it is needed in everyday life. This leads to the fact that the most important aspect to the participants, concerning factors that influence the choice of fitness studio, is the proximity to home or the work place. In actuality the fitness studio should always be closest to where the individual sportsperson is located at that point of time. Short distances cater for more time, as less is lost commuting. The setup of the fitness industry in Germany could provide such a user experience to the member. The basis of the structure has not changed since the beginning of fitness studios in Germany. More fitness companies, more locations, more members and the same offerings, cover the German market. Solely the health care aspect has moved into some of the chains systems, which led to a shift or actually an addition of a target group.

Due to that fact that a contract with a fitness studio over the longest possible period, mostly represents the cheapest possibility of visiting a fitness studio regularly, it is the most chosen form of contract. Although the participants of the survey mostly said the 44.71 euros per membership and month, given by the study of the "Handelsblatt", to be too expensive, the willingness to pay a certain amount of money per use of a fitness studio is present. Obviously, the sum people who are willing to pay, depends on the number of times fitness studios are visited. Illustration 26 in chapter number four gives an impression of acceptable prices to the test group, which stands representable for Germany. A person exercising once to twice a week could be willing to pay more per visit and want to use an extensive offering, while another might not be open to high per use prices, due to the fact that she or he works out almost every day. The frequency of visiting fitness studios therefore is also crucial for the willingness of paying per use.

Having proved this, it can be seen that the fitness studio industry in Germany provides various forms of setup, but does not develop equivalent to the progress in different sectors and markets. Everything possible, established within that setup is currently offered to the interested fitness studio member. Perhaps though, it is time to catch up to the development of paying for a service or product for the period it is utilized, narrowing the borders between the fitness studio companies, in terms of transparency, and the potential members or regular visitors. Opening this possibility to the customer might result in a loss of fixed memberships for the fitness studios in total, but clients returning on a

regular basis could then again lead to a superior occupancy rate overall and provide a win-win situation. A better occupancy rate for the fitness studios and a more suitable user experience to the sports member would be the results of this new development.

As can be seen, the surrounding of the fitness studio industry in Germany offers a lot of room for improvement concerning fulfilling customer wishes and needs of today. The industry should work on common grounds, making it more transparent and accessible to potential and existing members. Offering an application for technical devices, providing extensive and reliable information on all fitness studios within a certain range of the person wanting to practice sports, would secure easy access and comparability. Receiving additional information, on which classes are to take place at what time, and fitness studio, would open new possibilities of combining several different exercise forms and fitness studios in the daily routine. Setting reasonable prices for the payment per use of a fitness studio, according to the expected occupancy rate, would be an important step to take in order to lift the industry to the next level.

The most recent past has shown that a new service as previously implied is already being worked on. Start-up companies have taken on the quest of improving the system of the fitness studio surrounding in Germany, to benefit the potential customers. Keeping this in mind, it is desirable to achieve an overall great and unlimited user-experience to the people the fitness industry is made for. The future of the German fitness studio setup is happening now.

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## **8 Appendices**

8.1 Survey Questions

8.2 Survey Answer Graphs

## 8.1 Survey Questions

Introduction:

### Wie fit bist du?

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Hallo liebe Sportskanonen und Couchpotatoes, im Zuge einer wissenschaftlichen Studie zur Optimierung des Fitnessangebotes in Deutschland benötige ich eure Mitarbeit. Seit Jahrzehnten entstehen deutschlandweit zunehmend unterschiedliche Fitnessstudios. Sie unterscheiden sich durch Lage, Kursangebot und Vertragsdauer sowie der Gebühren. In meiner Studie untersuche ich die Zeitgemäßheit dieses Systems und ob dem Verbraucher im heutigen Zeitalter mehr Flexibilität geboten werden müsste.

Die Ergebnisse dieser Umfrage verbleiben im Rahmen dieser wissenschaftlichen Arbeit und werden nicht an Dritte weitergegeben. Die Antworten werden vertraulich und anonym behandelt.

Vielen Dank im Voraus!

Opening Picture:



Survey Question 1:

**Du bist**

- weiblich
- männlich

Survey Question 2:

**Wie alt bist du?**

- unter 18
- 18-25
- 26-35
- 36-45
- 46-55
- über 55 Jahre

Survey Question 3:

**Du wohnst in**

- einem Dorf
- einer Kleinstadt
- einer kleinen Großstadt (ab 100.000 Einwohner)
- einer großen Großstadt (ab 500.000 Einwohner)

Survey Question 4:

**Wie hoch ist dein monatliches Nettoeinkommen?**

- unter 1000€
- 1000€ bis 1999€
- 2000€ bis 3499€
- 3500€ bis 5000€
- über 5000€

Survey Question 5:

**Treibst du Sport?**

- ja
- nein

Survey Question 6:

**Warum treibst du keinen Sport?**

- Keine Zeit
- Keine Lust
- Zu teuer

Survey Question 7:

Der DSSV, Europas größter Arbeitgeberverband für die Fitness-Wirtschaft sagt in einer Studie: „Der Wunsch der Menschen, sich sportlich zu betätigen beziehungsweise eine aktive Gesundheitsvorsorge zu betreiben, beflügelt die Fitnessbranche, was nach unseren Prognosen 2017 in 10 Millionen Mitglieder in deutschen Fitness- und Gesundheitsanlagen münden wird“. Kannst du diesen wachsenden Fitness-Trend bestätigen?

- ja
- nein

Survey Question 8:

**Wie häufig treibst du Sport?**

- ca. 1-2 Mal im Monat
- ca. 5 Mal im Monat
- ca. 2 Mal die Woche
- ca. 3 Mal die Woche
- fast jeden Tag

Survey Question 9:

**Wie treibst du Sport?**

- im Fitnessstudio
- in einem Verein (z.B. Fußball oder Basketball)
- Freestyle - ganz individuell

Survey Question 10:

Würdest du je nach Angebot (z.B. bestimmte Kursangebote) gerne flexibel entscheiden können in welche Fitnessstudios du gehst und welche Übungen oder Kurse du für dich beanspruchst?

- ja
- nein

Survey Question 11:

Welches sind für dich die zwei wichtigsten Faktoren, die die Wahl deines Fitnessstudios beeinflussen?

- Atmosphäre im Studio
- Vertragslaufzeit und Monatsbeitrag
- Keine Überlastung durch zu viele Mitglieder
- Nähe zur Wohnung oder Arbeitsstätte
- Kursangebote

Survey Question 12:

Wieviel wärst du bereit für die flexible Nutzung verschiedener Fitnessstudios pro Besuch zu bezahlen?

- 5€ - 7€
- 8€ - 10€
- 11€ - 13€
- 14€ - 17€
- über 17€

Survey Question 13:

Wenn du dich sportlich betätigst, tust du dies dann

- alleine
- zu zweit oder dritt
- in einer Gruppe bzw. Mannschaft

Survey Question 14:

Wie wichtig sind dir Bewertungen von Fitnessstudios durch andere Sportlerinnen und Sportler?

- sehr wichtig
- nicht so wichtig
- interessiert mich nicht

Survey Question 15:

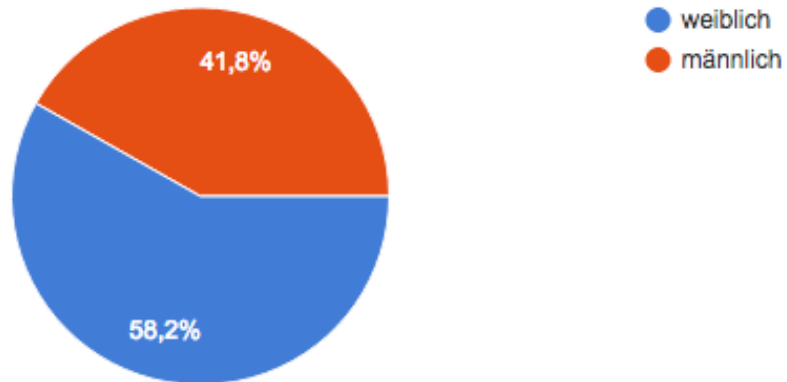
Laut Handelsblatt zahlt der durchschnittliche Besucher eines Fitnessstudios in Deutschland 44,71€ netto im Monat. Im Verhältnis zur Anzahl deiner Fitnessstudiobesuche pro Monat, findest du den Durchschnittsbeitrag gerechtfertigt?

- viel zu hoch
- zu hoch
- akzeptabel
- völlig gerechtfertigt

## 8.2 Survey Answer Graphs

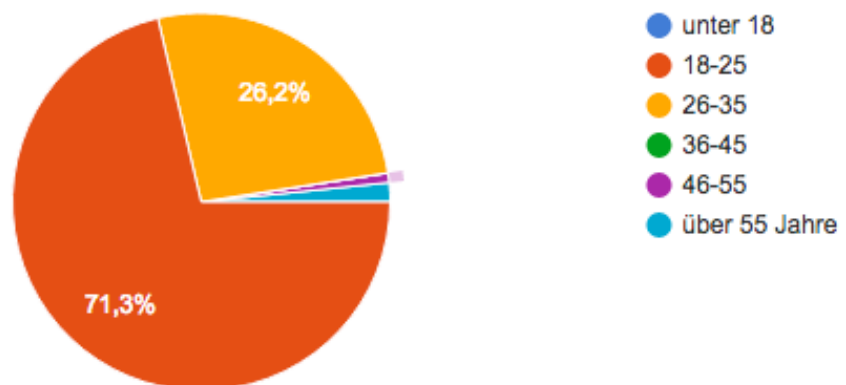
Survey Answer Graph 1:

**Du bist** (122 Antworten)



Survey Answer Graph 2:

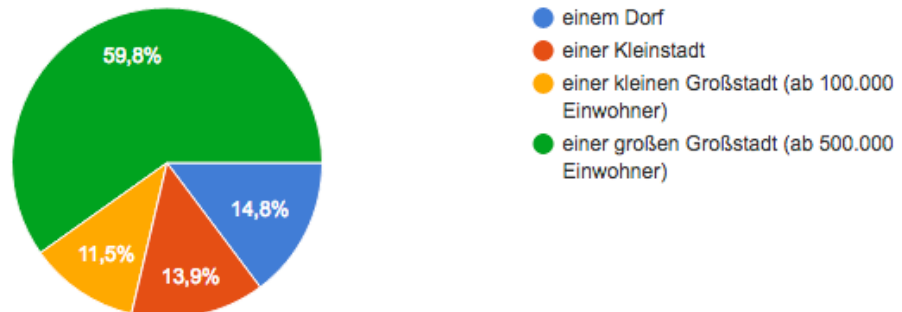
**Wie alt bist du?** (122 Antworten)





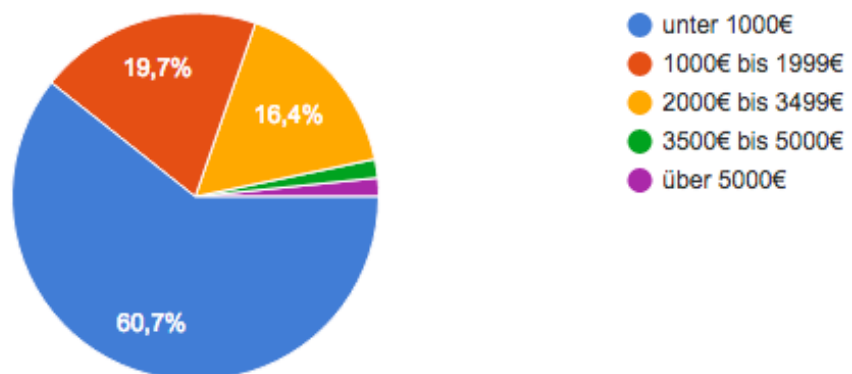
Survey Answer Graph 3:

**Du wohnst in** (122 Antworten)



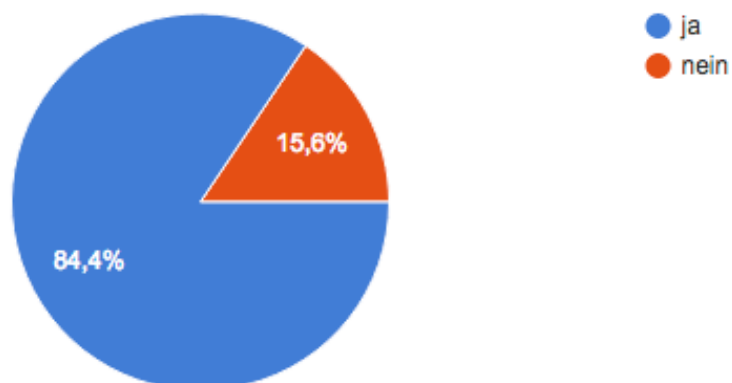
Survey Answer Graph 4:

**Wie hoch ist dein monatliches Nettoeinkommen?** (122 Antworten)



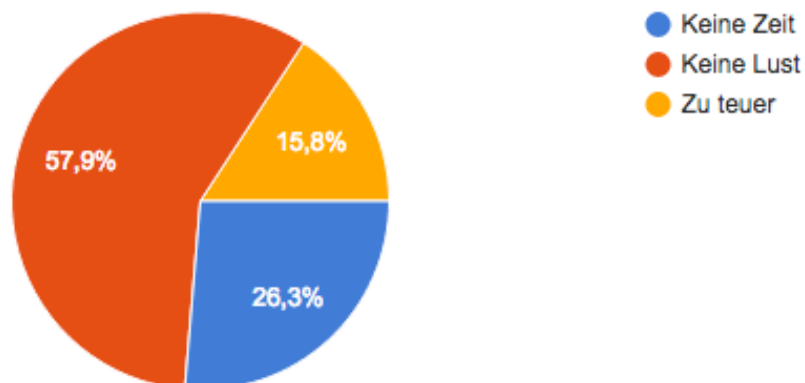
Survey Answer Graph 5:

**Treibst du Sport?** (122 Antworten)



Survey Answer Graph 6:

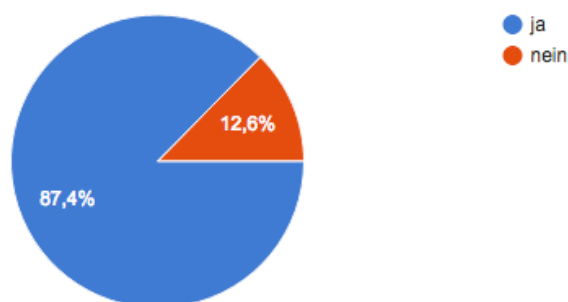
### Warum treibst du keinen Sport? (19 Antworten)



Survey Answer Graph 7:

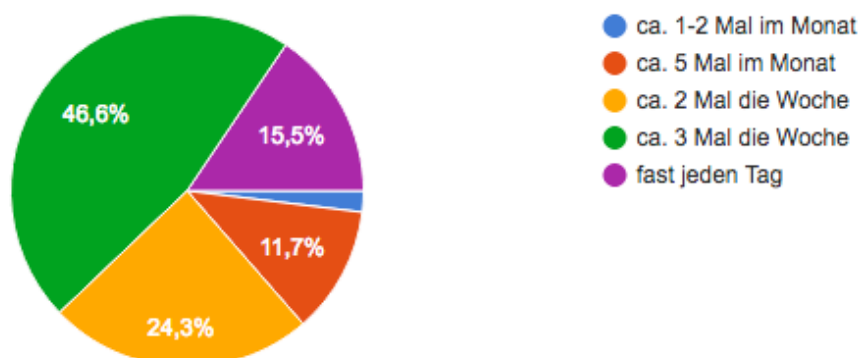
Der DSSV, Europas größter Arbeitgeberverband für die Fitness-Wirtschaft sagt in einer Studie: „Der Wunsch der Menschen, sich sportlich zu betätigen beziehungsweise eine aktive Gesundheitsvorsorge zu betreiben, beflügelt die Fitnessbranche, was nach unseren Prognosen 2017 in 10 Millionen Mitglieder in deutschen Fitness- und Gesundheitsanlagen münden wird“. Kannst du diesen wachsenden Fitness-Trend bestätigen?

(103 Antworten)



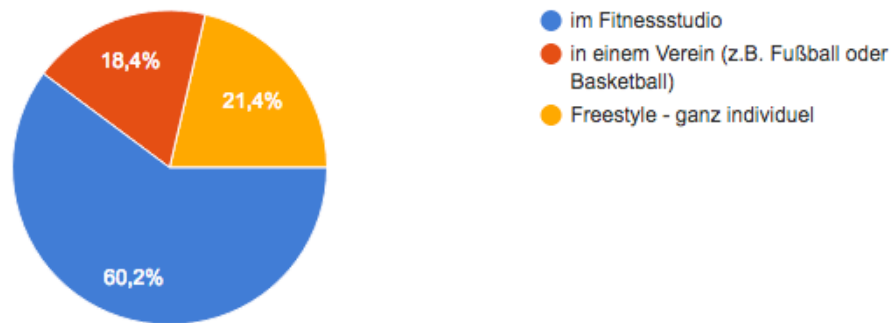
Survey Answer Graph 8:

### Wie häufig treibst du Sport? (103 Antworten)



Survey Answer Graph 9:

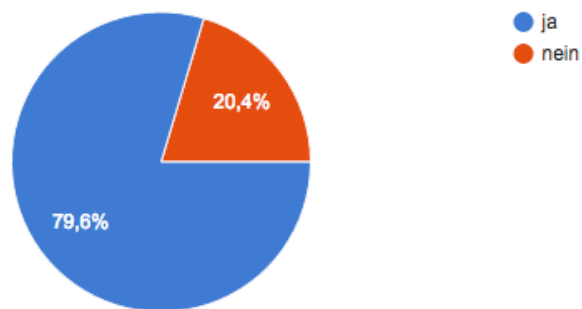
**Wie treibst du Sport?** (103 Antworten)



Survey Answer Graph 10:

**Würdest du je nach Angebot (z.B. bestimmte Kursangebote) gerne flexibel entscheiden können in welche Fitnessstudios du gehst und welche Übungen oder Kurse du für dich beanspruchst?**

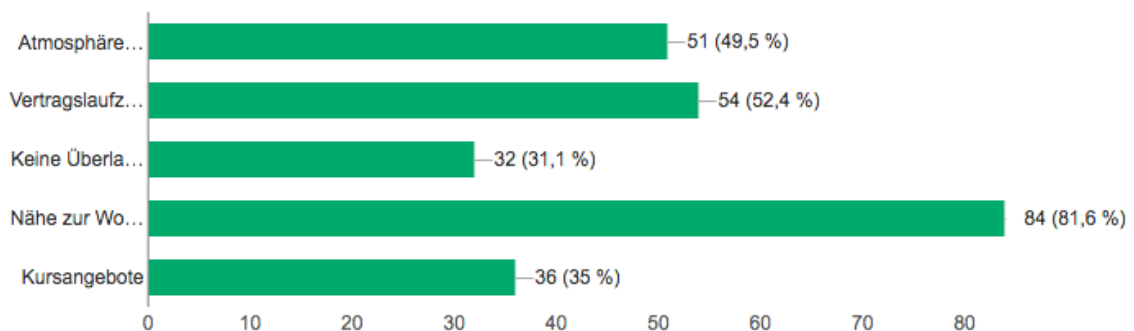
(103 Antworten)



Survey Answer Graph 11:

**Welches sind für dich die zwei wichtigsten Faktoren, die die Wahl deines Fitnessstudios beeinflussen?**

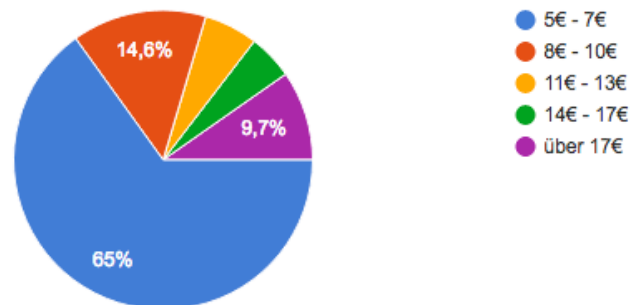
(103 Antworten)



Survey Answer Graph 12:

**Wieviel wärst du bereit für die flexible Nutzung verschiedener Fitnessstudios pro Besuch zu bezahlen?**

(103 Antworten)



Survey Answer Graph 13:

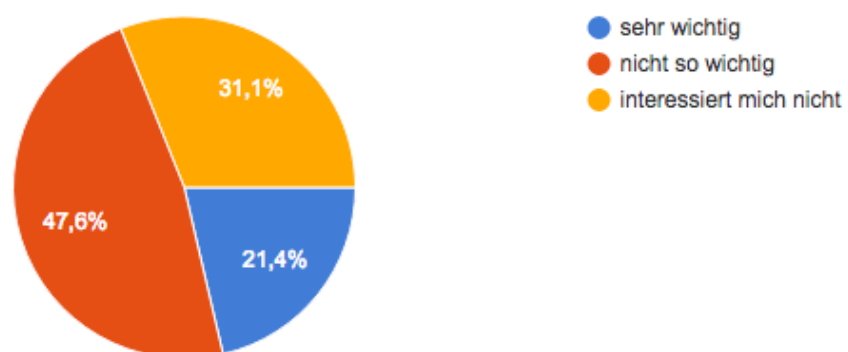
**Wenn du dich sportlich betätigst, tust du dies dann** (103 Antworten)



Survey Answer Graph 14:

**Wie wichtig sind dir Bewertungen von Fitnessstudios durch andere Sportlerinnen und Sportler?**

(103 Antworten)



Survey Answer Graph 15:

Laut Handelsblatt zahlt der durchschnittliche Besucher eines Fitnessstudios in Deutschland 44,71€ netto im Monat. Im Verhältnis zur Anzahl deiner Fitnessstudiobesuche pro Monat, findest du den Durchschnittsbeitrag gerechtfertigt?

(103 Antworten)

