



**DEEP INSIGHTS
ON INDIAN FITNESS TRENDS**

FOREWORD



Over the years, sports sector has evolved as a noticeable segment in the economy, presenting myriad career as well as business opportunities. It includes several segments — sports infrastructure, sports events, training, goods manufacturing and retail. The business of sports is not just limited to the mentioned segments. It has far-reaching implications on the economy due to its close association with other sectors, including education, real estate and tourism. Sports also contributes significantly towards improving the overall health and well-being of a country.

The fitness industry too has evolved rapidly from its nascent unstructured beginning to a comprehensive ecosystem today where it has become an inseparable part of sports, wellbeing and competitive events. Fitness has multiple disciplines under its umbrella like aerobics, yoga, aerial yoga, pilates, MMA, kickboxing etc. which have become fitness trends.

FICCI strongly believes that the launch of FIT INDIA Movement by the Hon'ble Prime Minister, Shri Narendra Modi ji, will provide impetus to the fitness industry, a sunrise sector, which has great a potential and is poised to grow by 22-30 per cent every year. FICCI Sports Committee through TURF, annual flagship summit, provides a strategic platform to deliberate on ways to boost this industry via public-private partnership and make our country a global leader in this area.

The fitness industry in India is evolving with diverse products and service segments by leveraging new technology and digitization. Established players are pursuing revenue maximization through product and service diversification and are exploring new global and domestic markets. Franchising is emerging as a popular option for scaling up. Optimistic about future growth prospects, companies are also actively seeking public and private equity investments.

This report is aimed at understanding the opportunities and challenges, the industry has to offer, by ways of observations, hypothesis and surveys acknowledging the demographic variables. I am grateful to the FICCI Sports Committee and our Knowledge Partner for jointly producing this timely report, which should pave the way for future discussions with all the stakeholders and add value to the industry.

Dilip Chenoy

Secretary General



Message from Director, IISM



I am proud of the fact that IISM has been associated with many a pioneering venture since we entered the realms of Sports Management education in 2010.

Our students and alumni have done themselves well and India's rapidly expanding Sports sector is proud with their enterprise and expertise for the past nine years. This report – a tribute to the phenomenon of Fitness which is steadily and surely capturing the imagination of the nation – is another feather in their cap.

The fitness industry has evolved from an unstructured beginning into a thriving and buzzing ecosystem, where it has become synonymous with Sports.

This report is aimed at understanding the opportunities and challenges that the Fitness industry has to offer. I am grateful to our students and the FICCI Sports Committee for jointly producing this timely report, which should pave the way for future discussions with all the stakeholders and ensure that the industry goes from strength to strength in the years to come.

Nilesh Kulkarni



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EXECUTIVE SUMMARY

The background of the top section is a photograph of a gym. On the left, there are rows of dumbbells on a rack. The rest of the image is a blurred view of gym equipment and people working out. Overlaid on the right side of the image is the text "EXECUTIVE SUMMARY" in a bold, black, sans-serif font. Below the text is a thick blue horizontal bar.

EXECUTIVE SUMMARY

The importance and significance of Fitness has been accepted universally in the 21st century. Digitization and technology have totally changed the way humans live and carry out their daily activities. While technology has made life simpler, it has also made people lazier as well. Life has become fast-paced and people are under tremendous stress to perform at their respective workplaces, balancing work and personal life in every domain. Even as they went about doing so, physical and mental fitness took a back seat, owing to the changed, sedentary lifestyles and a heavy workload. In recent times, we have heard of people in their 30s and 40s suffering from heart attacks, which are backed by evidence from cardiologists. This simply indicates the lack and neglect of fitness.

It is believed in Ayurveda that mental and physical health cannot exist independent of each other. Thus, fitness as a whole broadly comprises mental and physical fitness in tandem.

Physical activity boosts cardiovascular strength, and mental fitness helps improve cognitive functioning and reduces the release of stress hormones. Fitness boosts memory, reduces stress, increase productivity and inculcates a sense of discipline.

Technology has brought worldwide data on our fingertips, which has helped develop a sense of awareness about fitness among the millennials also in recent years, the healthcare sector has become one of the largest in the country, which in turn has contributed to an increasing awareness of physical and mental fitness. Through varied sources like scholars, doctors, researchers and influencers, people are being reminded constantly of the importance of fitness in a person's life.

International brands and gymnasium chains are thus looking to exploit the Indian fitness market and thereby contributing to an increase in fitness awareness and participation of people in physical activities and exercise. With rising disposable incomes, especially of those in Tier 1 and Tier 2 cities, the gym culture is becoming increasingly popular. Each individual has a different motivation and objective to achieve and these gyms just rightly offer them these services, thereby promoting Physical fitness.



FITNESS INDUSTRY



The Fitness industry comprises of gyms, fitness equipment companies, clothing company and so on. The main objective of this industry is to provide services and products that promote health and wellness while drawing a profit from people's participation within the industry. People may find different ways to train. Thus, there is a broad range of organizations which come under the fitness industry.

MEMBERS OF THE FITNESS INDUSTRY:



PORTER'S FIVE FORCES:

Gyms and fitness centres are perhaps the most prominent players of the fitness industry. We have analysed this industry with the help of Porter's five forces.



COMPETITION

Large Number of Franchises

Local Gyms

Healthcare Centre

Easily switchable for the customer

Less customer Loyalty

**THREATS FROM
NEW ENTRANTS**

No barrier for Entry

Lowering of price

Reduced Profit

Technological Advancement

Market Share

**BARGAINING
POWER OF
SUPPLIER**

Do Price setting

Increase Profits

Easily able to substitute

Large Number of supplier

**THREAT OF
SUBSTITUTION**

Easy Traditional Methods

Lack of Mental Strength

No money involved for traditional method

**BARGAINING
POWER OF
CUSTOMER**

Strong Competition

Price sensitivity: High

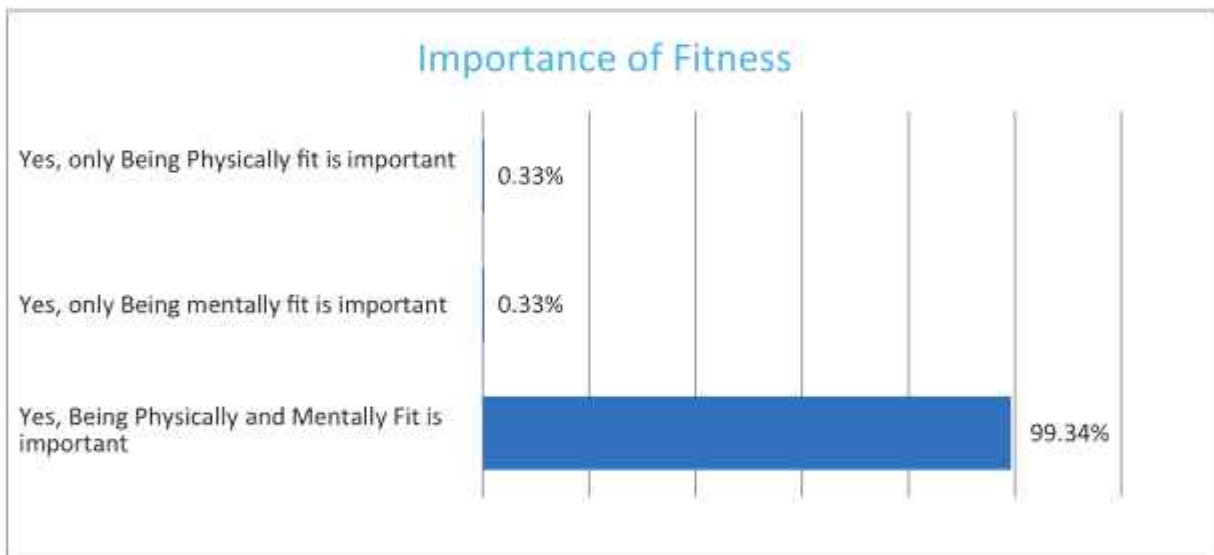
Result Oriented



TREND ANALYSIS



FITNESS INDUSTRY



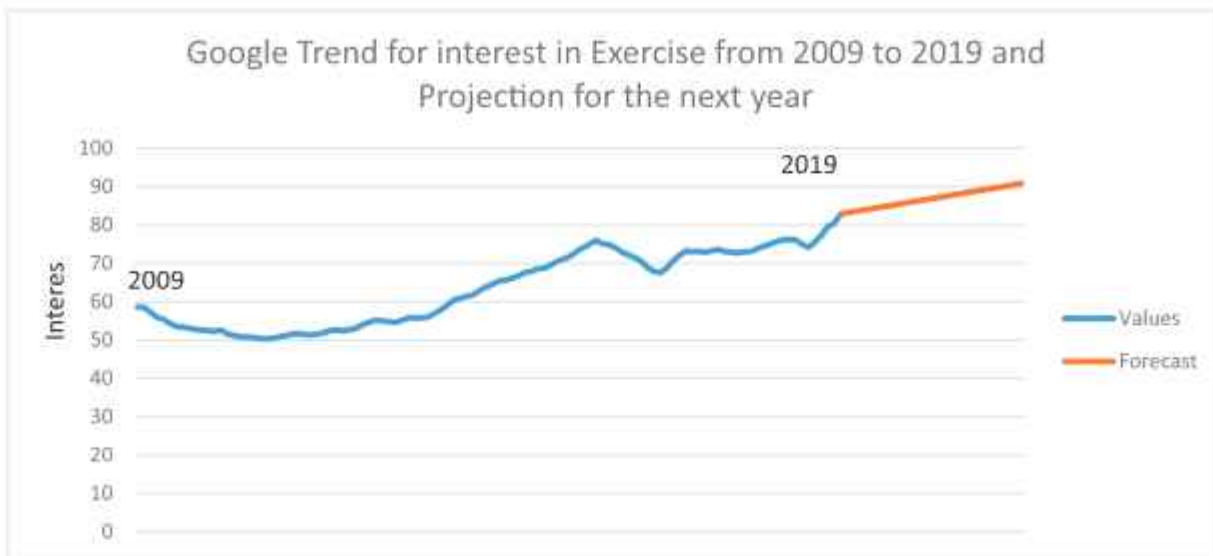
OBSERVATION

Both physical Fitness and Mental Fitness are equally important.

From this it can be inferred that almost everyone is aware that both physical fitness and mental fitness are extremely important.

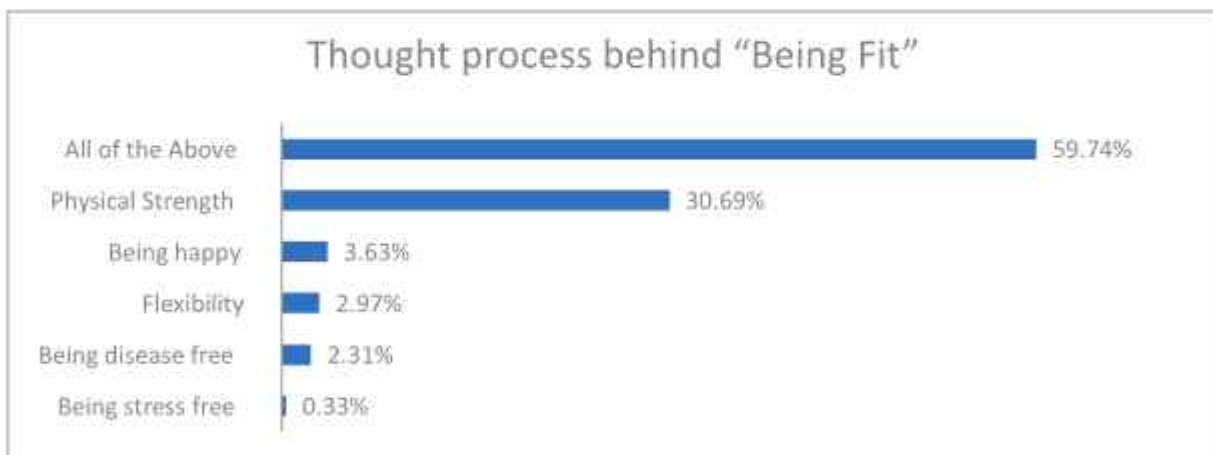
A healthy body and healthy mind are interlinked and the respondents clearly agree with this notion.

People's awareness towards the importance of fitness has increased tremendously. Government initiatives like the Fit India movement, provides an impetus to the people to move towards a healthy, fitter society



Google Searches of the term “Exercise” in India over the last 10 years

It can be seen that there has been a gradual increase in interest in “Exercise”



Physical Strength, Happiness, Flexibility, Physical Health and Mental Health are factors that contribute to Fitness.

Almost 60% of our respondents think they’re all important.

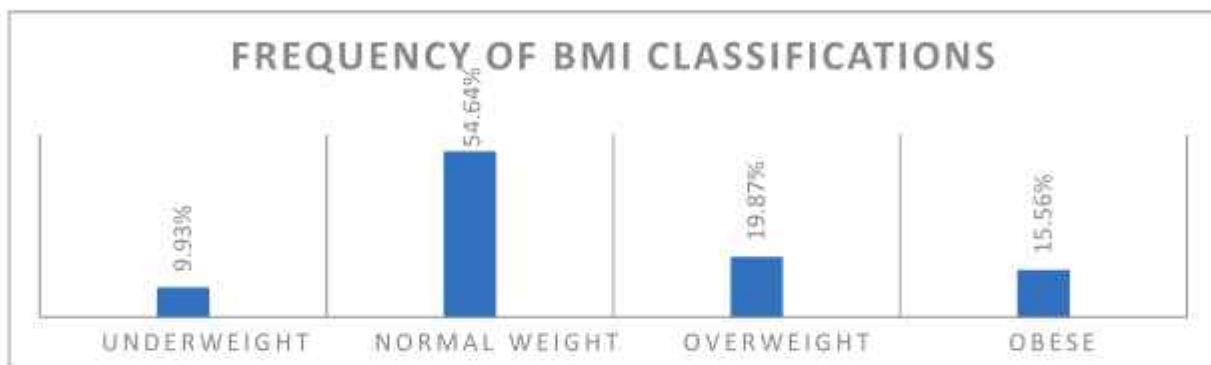
30% of our respondents say Physical Strength is what Fitness is.

WHAT IS FITNESS

- Fitness is a state of good health and well being and the ability to carry out daily activities without undue fatigue.

WHAT IS MENTAL FITNESS

- Mental fitness refers to a state of psychological and emotional well - being, having a positive outlook in daily life.



BMI-Body mass index

Body Mass Index (BMI) is a person's weight in kilograms divided by the square of height in meters. It is tool to measure obesity and over-weight of an individual.

BMI	Classification
< 18.5	Underweight
18.5–24.9	Normal Weight
25.0–29.9	Overweight
30.0 and above	Obese

54.64% of the respondents fall in the normal weight category.

Considering that majority of the respondents are among the youth, the 45% of respondents which do not fall in the normal BMI range is worrisome.

TESTING OF HYPOTHESIS

H0

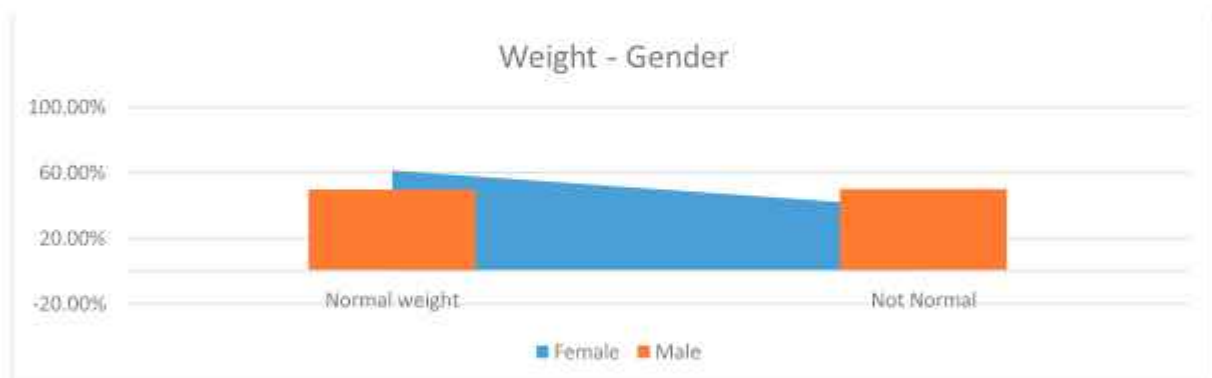
- There is no association between Gender and BMI Classification

H1

- There is association between Gender and BMI Classification

	Normal weight	Obese	Overweight	Underweight	Abnormal Weight*
Female	61.29%	10.48%	14.52%	13.71%	38.71%
Male	49.72%	19.21%	23.73%	7.34%	50.28%

*Abnormal Weight has been calculated as the sum of Obese, Overweight and Underweight



Using Statistical testing we see that the H0 statement is rejected.

But H1 that is relationship between Gender and BMI is established

H0

- There is no association between Marital Status and BMI Classification

H1

- There is association between Marital Status and BMI Classification

	Normal weight	Obese	Overweight	Underweight	Abnormal weight*
In Relationship	41.67%	25.00%	16.67%	16.67%	58.33%
Married	36.36%	25.00%	38.64%	0.00%	63.64%
Single	58.77%	12.72%	17.11%	11.40%	41.23%

*Abnormal Weight has been calculated as the sum of Obese, Overweight and Underweight



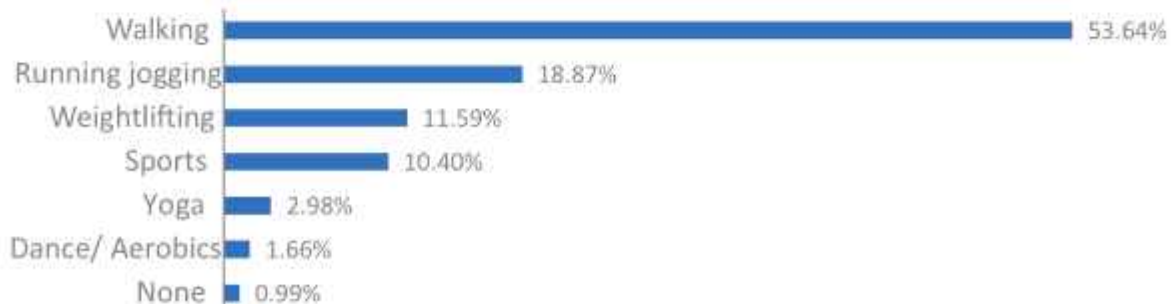
significant number of married individuals (63%) lie in the Overweight and the obese category.

From the single individuals, 30% of individuals fall into the Overweight and Obese category.

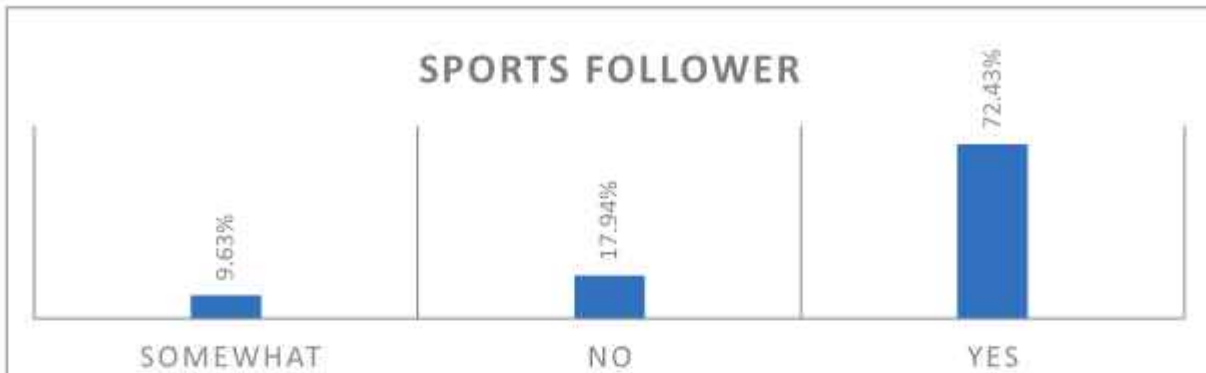
Using Statistical testing we see that the H₀ statement is rejected.

But there is relationship between Marital Status and BMI.

Ways to be fit

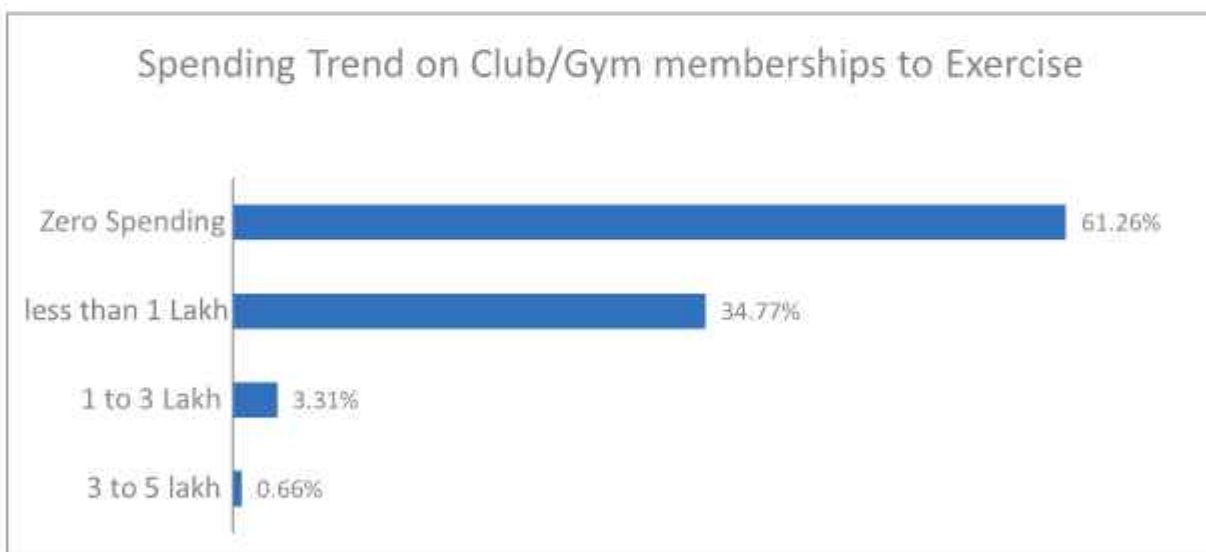


Listed above are ways in which people choose to exercise.



India is a cricket-crazy country. However, sports like Football, Kabaddi, Badminton, Volleyball, etc. are gaining in popularity. India as a country follows sports massively as compared to actual participation.

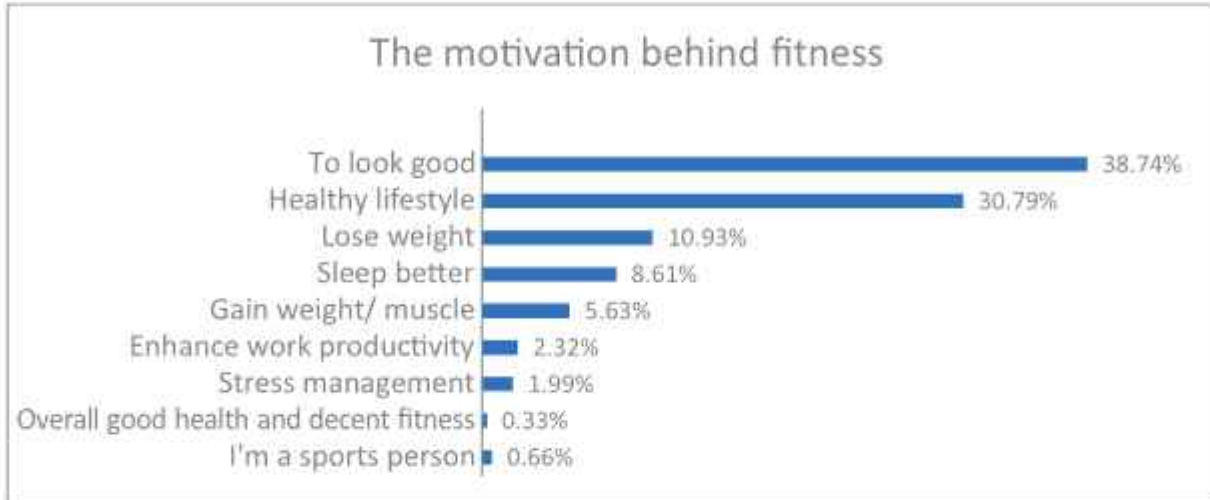
It is an interesting trend to notice in the respondents following sports and its correlation to engage in physical activity. Following a sport and athletes usually has a positive influence on spectators wanting to idolize their favorite athlete's fitness levels.



Investing in your health (physical and mental) is a long-term investment for longevity in life. In metropolitan cities, the daily hustle and bustle creates a stressful environment.

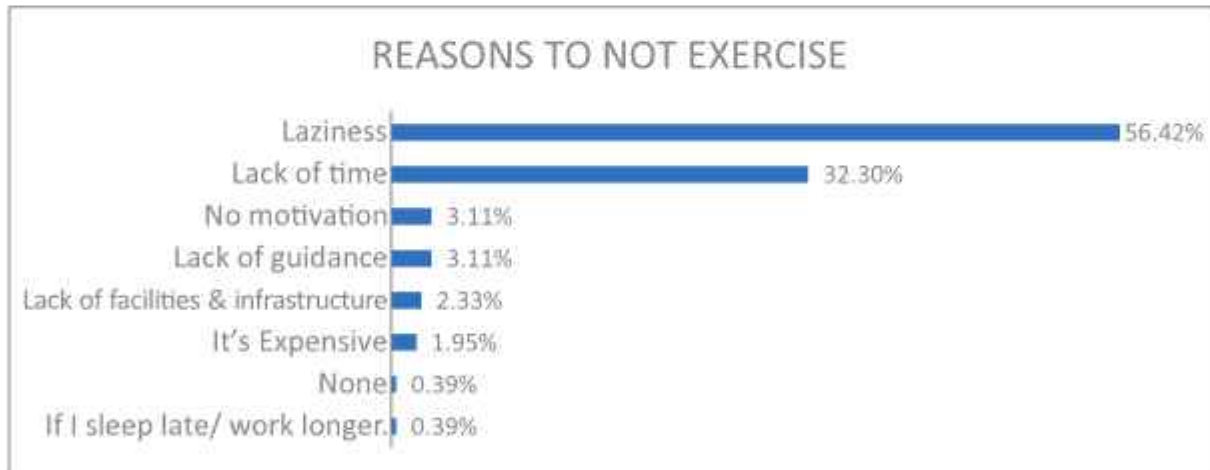
Majority of the people have zero spending on club or gym memberships.

Walking was the most preferred choice of people to maintain physical fitness. It is a very convenient form of exercise with almost negligible expenditure.



Aesthetics and leading a healthy lifestyle are major motivating factors, followed by the motivation to lose weight, to get better sleep, to gain muscle and others.

Most people are motivated to be fit with respect to physical appearance and healthy lifestyle more than for mental aspects like stress management, work productivity.



Laziness is the main reason of lack of Physical Exercise, followed by lack of Time.

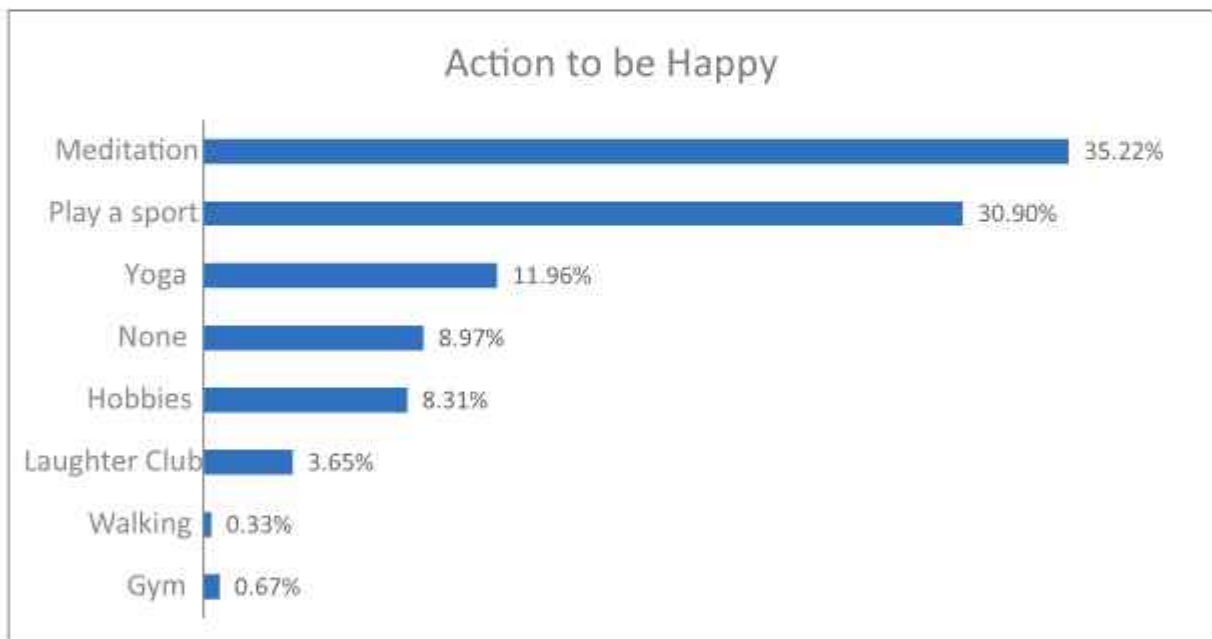
Considering that the respondents belong to major Metropolitans cities in India, living a fast paced life, it's not surprising that lack of time is a significant reason why people don't exercise.

MENTAL HEALTH



81% of the people agrees that stress is a major part of their lives nowadays and this is alarming

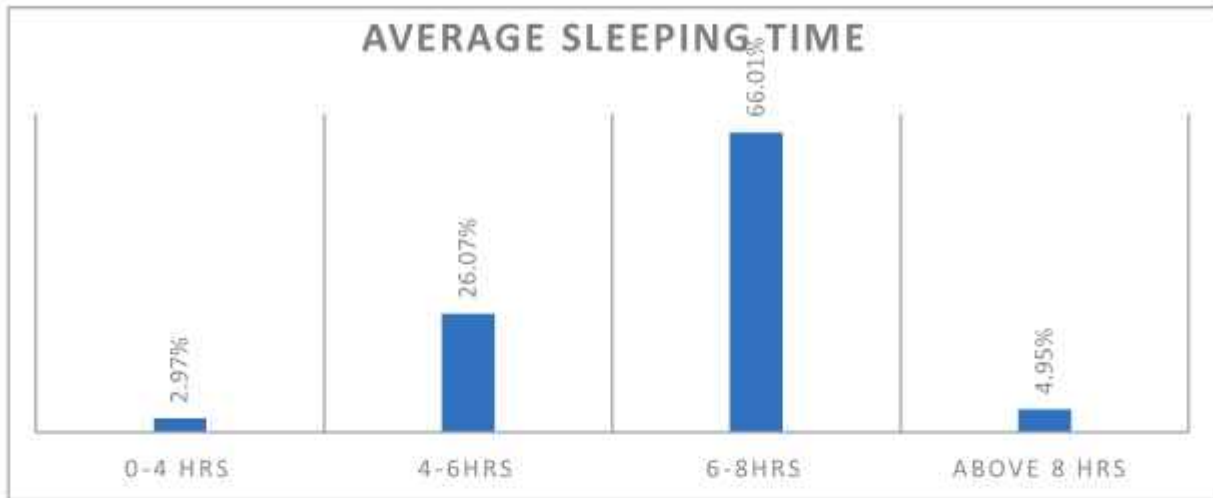
On asking the respondents how they try to beat stress, the following was their response:



Playing Sport is the biggest stress buster after meditation

Another listed option was going to a therapist for dealing with mental health; however, none of the surveyed people thought that going for therapy was a preferred method for improving mental health.

Also nearly 9% accepted that they do not do anything to be mentally healthy.



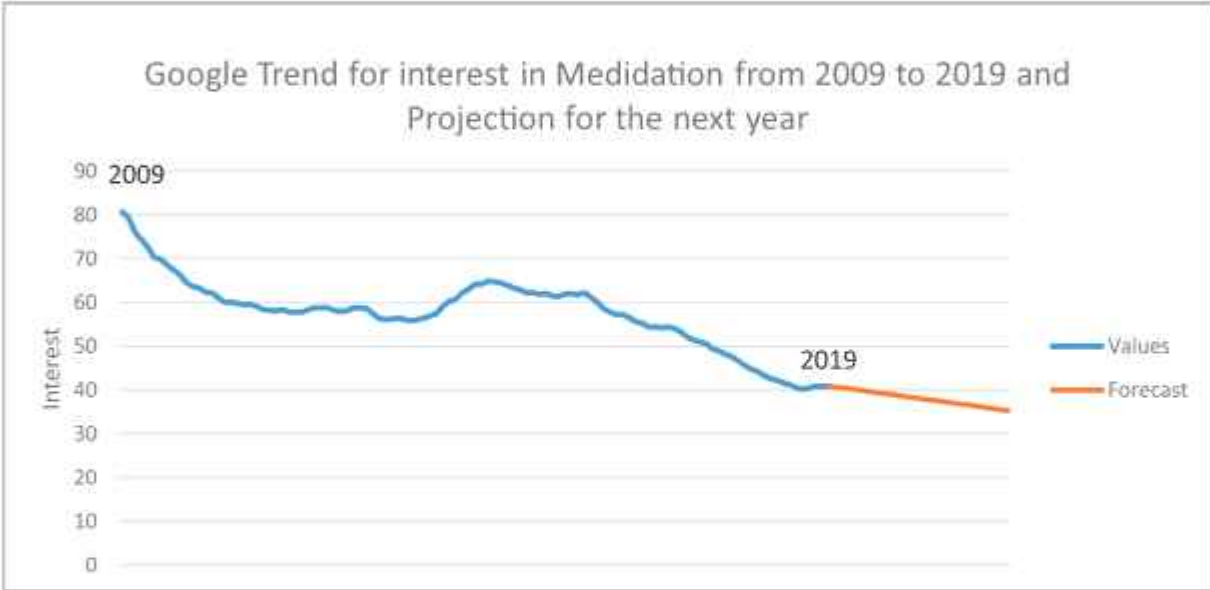
AGE	RECOMMENDED	MAY BE APPROPRIATE	NOT RECOMMENDED
Newborns 0-3 months	14 to 17 hours	11 to 13 hours 18 to 19 hours	Less than 11 hours More than 19 hours
Infants 4-11 months	12 to 15 hours	10 to 11 hours 16 to 18 hours	Less than 10 hours More than 18 hours
Toddlers 1-2 years	11 to 14 hours	9 to 10 hours 15 to 16 hours	Less than 9 hours More than 16 hours
Preschoolers 3-5 years	10 to 13 hours	8 to 9 hours 14 hours	Less than 8 hours More than 14 hours
School-aged Children 6-13 years	9 to 11 hours	7 to 8 hours 12 hours	Less than 7 hours More than 12 hours
Teenagers 14-17 years	8 to 10 hours	7 hours 11 hours	Less than 7 hours More than 11 hours
Young Adults 18-25 years	7 to 9 hours	6 hours 10 to 11 hours	Less than 6 hours More than 11 hours
Adults 26-64 years	7 to 9 hours	6 hours 10 hours	Less than 6 hours More than 10 hours
Older Adults ≥ 65 years	7 to 8 hours	5-6 hours 9 hours	Less than 5 hours More than 9 hours

The above sleep duration recommendations are based on a report of an expert panel convened by the US based National Sleep Foundation and published in 2015 in their journal Sleep Health.

The average amount of sleep an individual requires depend on various factors like age, gender, health conditions, etc.

It is interesting to note that majority of the people who answered the survey do get sufficient sleep.

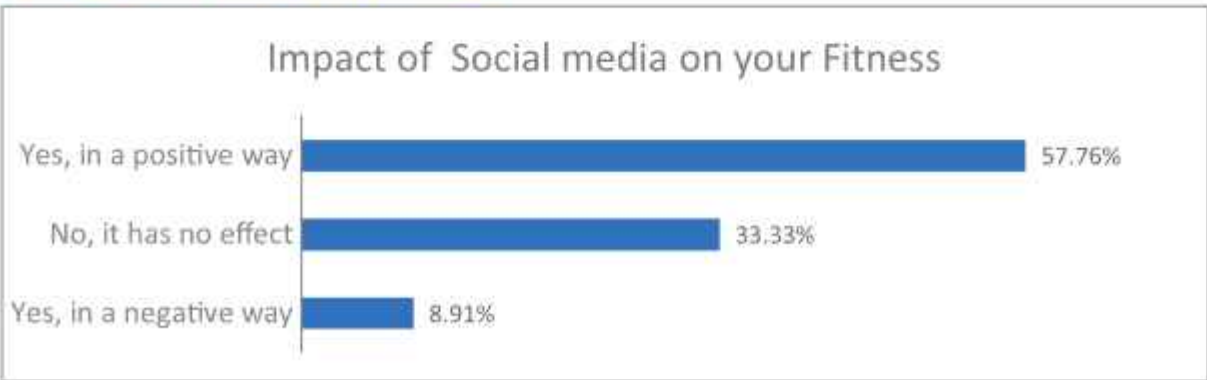
When a person has a good night’s sleep the body undergoes various biological processes and repairs itself. Having healthy sleeping habits ensures that the body recovers from the day’s wear and tear and restores itself physically and mentally for the next day.



People search in Google What they like most and try to find new methods to improve. The trend shows how Indian people have used Google to find out "Meditation" in India over the last 10 years.

It can be seen that there has been a gradual decrease in interest in "meditation"

SOCIAL MEDIA AND FITNESS

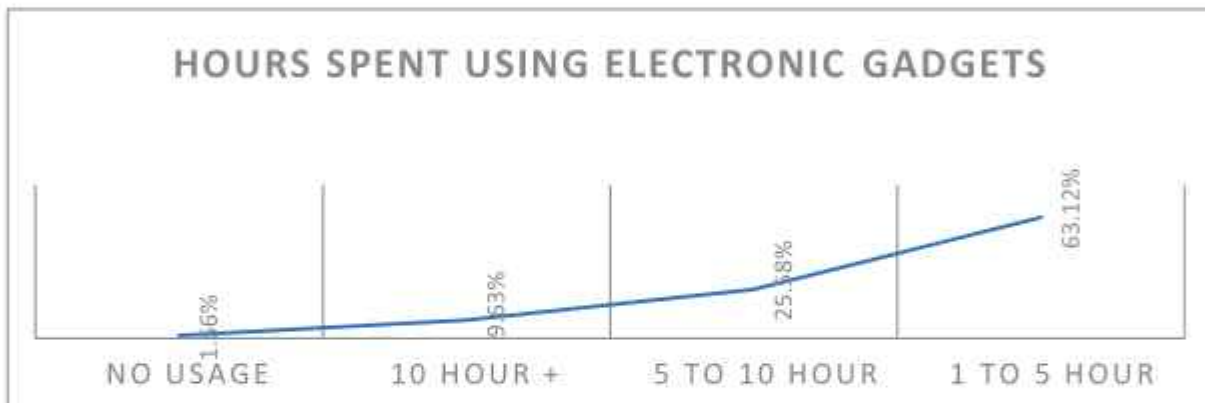


Social media platforms like Facebook, YouTube, and Instagram which are popular, especially among the youth, are flooded with posts consisting of images and content regarding what the “ideal” body types are. With the kind of influence that social media has, such content may influence people to desire “ideal” body types.

It is interesting to note that about 58% the respondents say that these posts are encouraging and give them inspiration to exercise. A third of the respondents felt that they weren’t affected by such content on social media.

Only about 9% of the respondents felt that they were negatively influenced.

Majority of the people believe mental fitness is just as important as physical fitness.

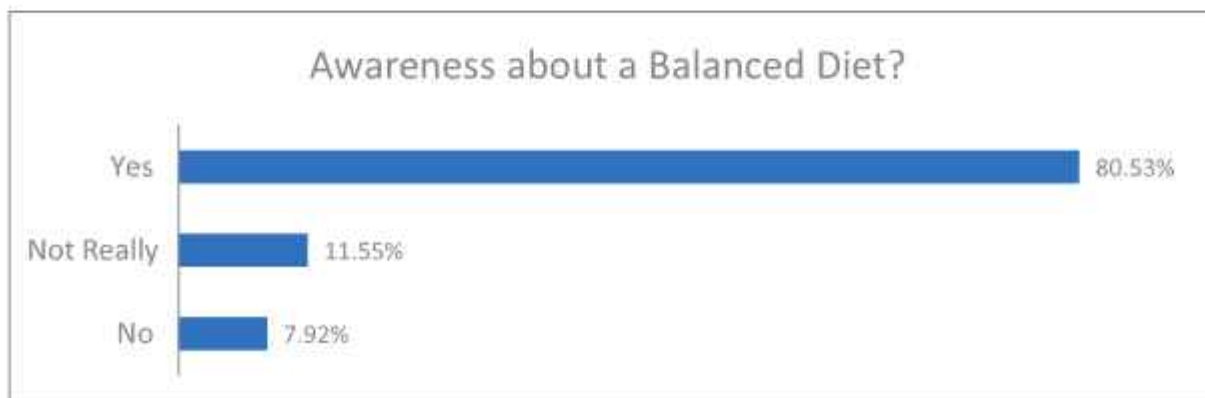


Mentioned above are the hours spent using electronic gadgets. With technology growing exponentially, people spend extended hours on electronic gadgets.

Excessive usage of electronics results in mental exhaustion, causes sleep disturbances, and leaves less time for other activities like hobbies, sports or even work.

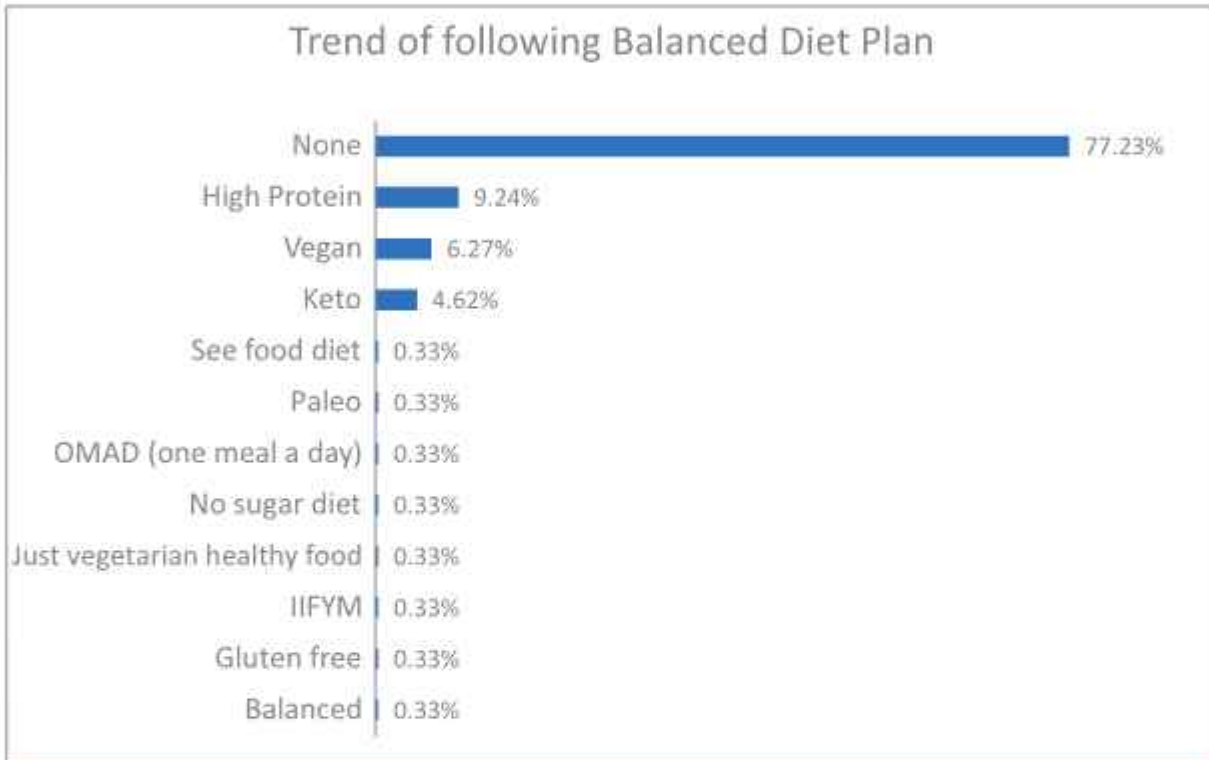
About 65% of the respondents use gadgets for less than 5 hours a day.

DIETS AND FITNESS



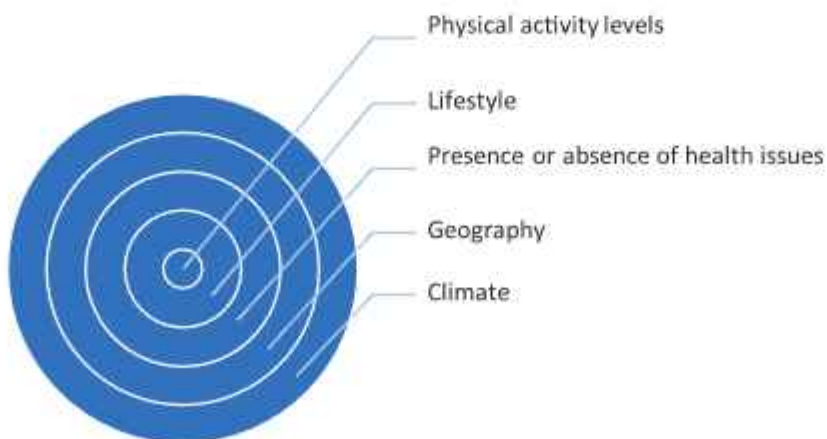
81% of the surveyed individuals have an idea of what a balanced diet is.

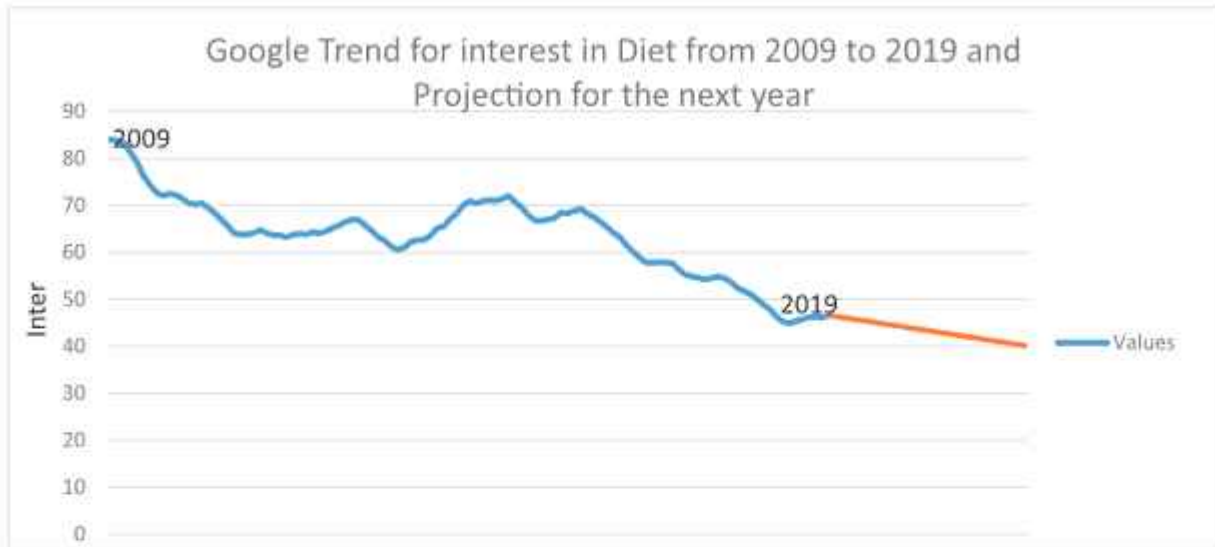
A balanced diet is a diet which contains an adequate quantity of all the nutrients which a human body requires. It essentially includes the six main nutrients of fats, protein, carbohydrates, fibre, vitamins and minerals. It is essential to have a balanced diet for good mental and physical health, improved brain function and immunity.



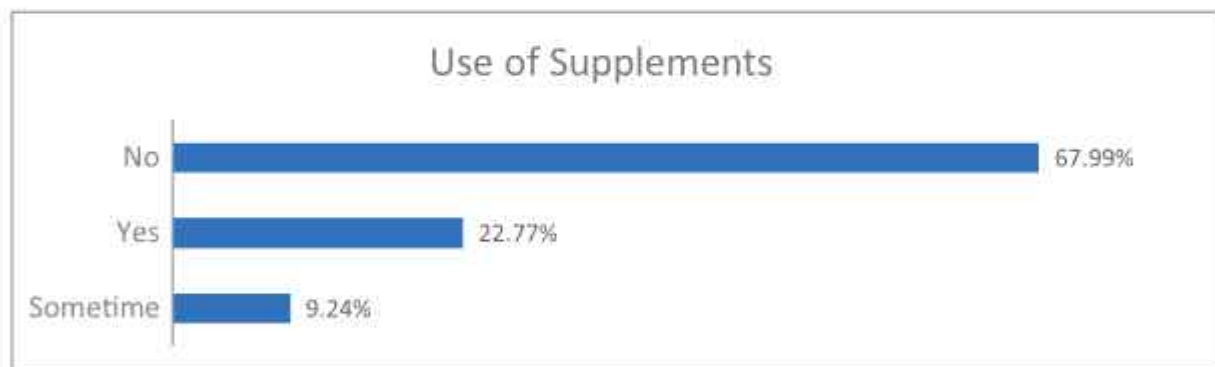
Though majority of people know about balanced diets, maximum individuals do not follow any specific diets.

Diets should ideally differ from person to person based on individual physical requirements. The factors affecting diet requirements are:





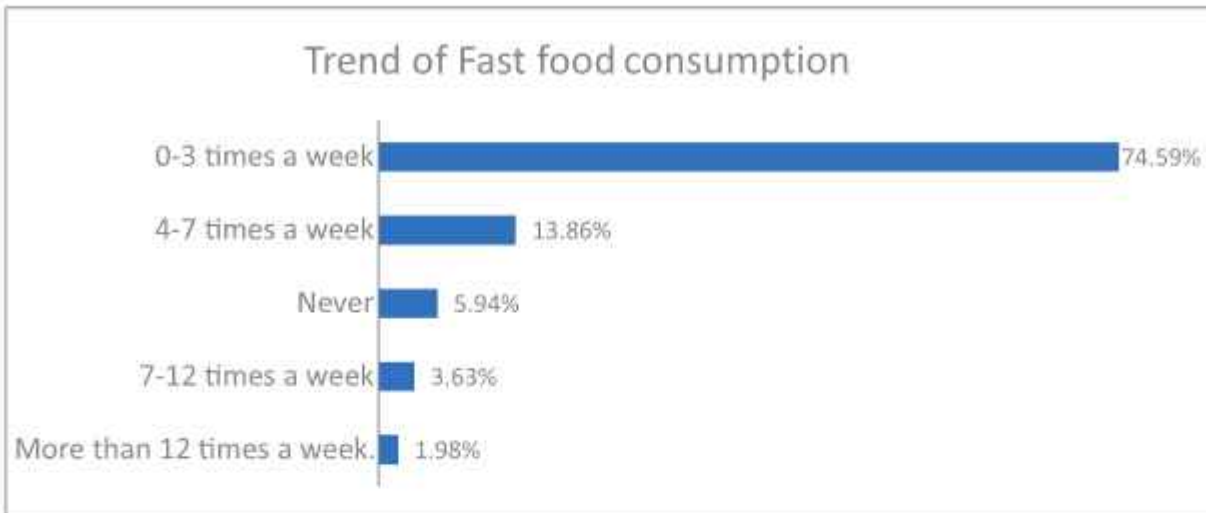
The Google search trend shows that there has been a gradual decrease in interest in “Diet.”



Supplements are taken to contribute to a Balanced Diet. They are consumed in addition to food to provide for nutrients that are otherwise not sufficiently consumed through a diet .

About 68 % of the respondents do not use any supplements, this could mean their diet provides for all nutrient requirements or they do lack certain nutrients yet do not take supplements due to lack of such awareness.

About 23% of the respondents use supplements regularly to meet their nutritional needs.

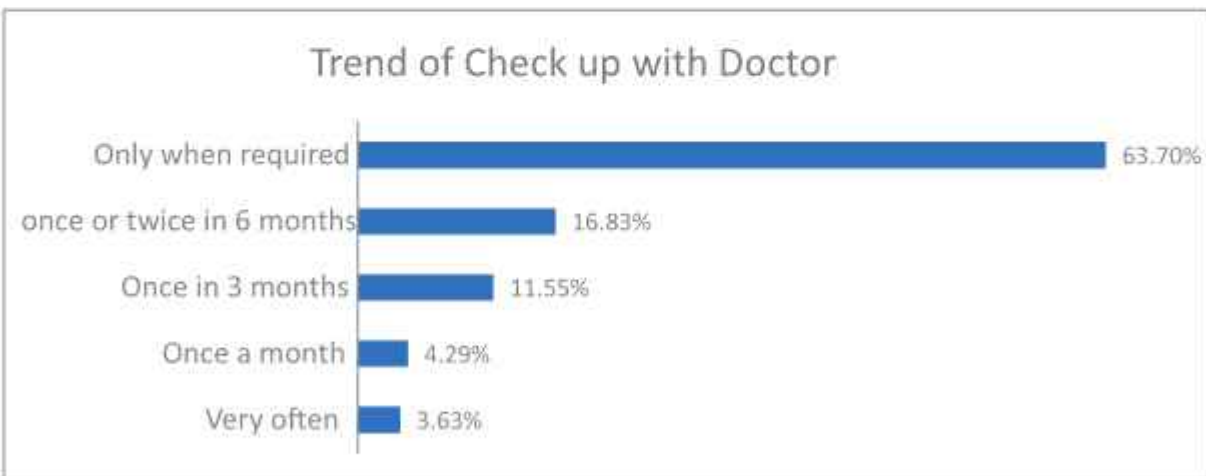


Given above is the number of times people consume food from restaurants, street food, junk food or fast food.

Given that the respondents are from major cities and have a fast-paced life, fast food and restaurants offer convenient dining options for people.

80% of the surveyed people consume outside food 0 to 3 times a week or never, which is an interesting trend to notice.

This is a positive outcome indicative of people consciously avoiding junk food and moving towards healthy food habits which greatly effect physical and mental health.



Most of the people go to the doctor rarely or only when required.

A combination of approximately 35% visits the doctor often in year, indicative of poor health.

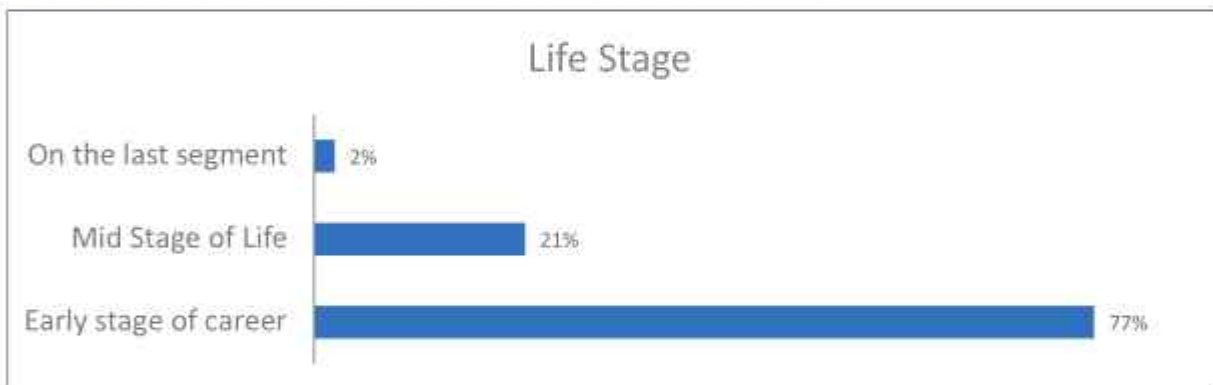


**CORRELATION BETWEEN
SPORTS & FITNESS IN LIFE**

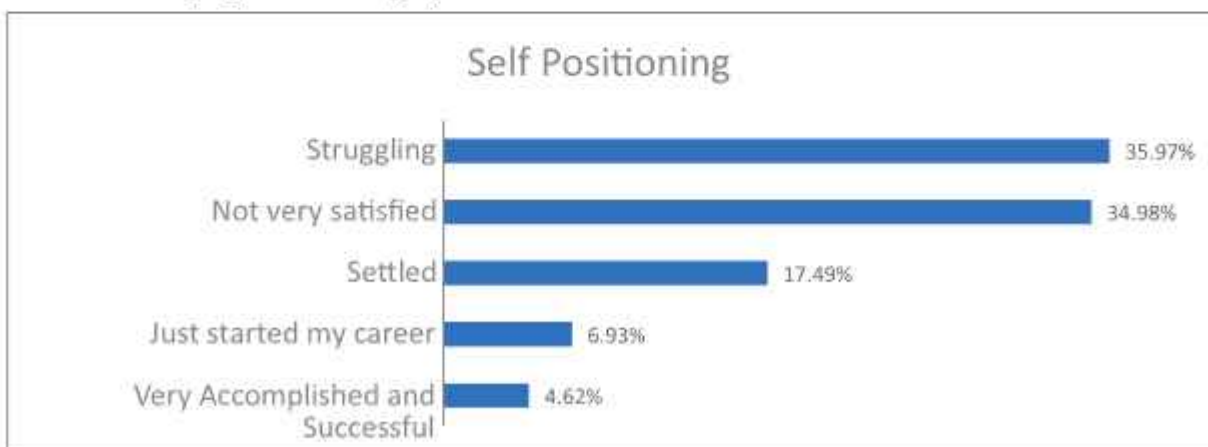


CORRELATION BETWEEN SPORTS & FITNESS IN LIFE

SELF ANALYSIS OF THE SURVEYED INDIVIDUALS



The given graph reflects the different stages of career the surveyed individuals belong to. This data reveals how most of the respondents are at the beginning of their careers, with over 3/4th of them belonging to that category.

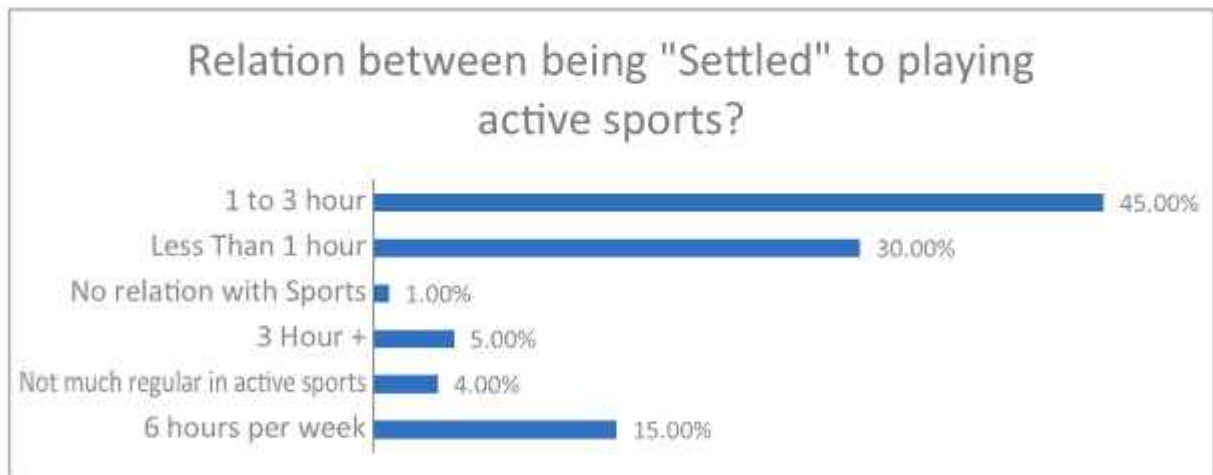


This data is the self-assessment of the level of accomplishment in the careers of the surveyed people. It showcases the sense of stability and the growth perception/expectation the respondents have, with respect to their professional success and challenges.

The majority believe that they are either struggling or not satisfied in their careers



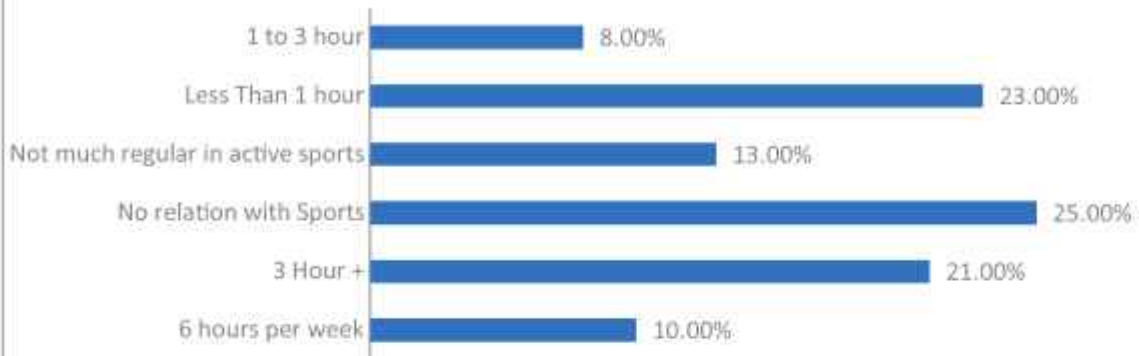
Majority of the people who believe that they are accomplished and well settled, do find time and play active sports



Even when a person wishes to maintain a healthy balance of work and physical fitness during their week, it is extremely essential for him/her to have a sense of stability and calm towards where he/she is in his / her respective career. This is what the term 'Settled' here refers to, in spite of which the data here shows that still around a quarter of the settled population doesn't work to achieve the essential level of fitness.

Approximately 45% of the individuals have an active lifestyle, who consider themselves "Settled". Time constraints or work life balance might be a challenge for the drop.

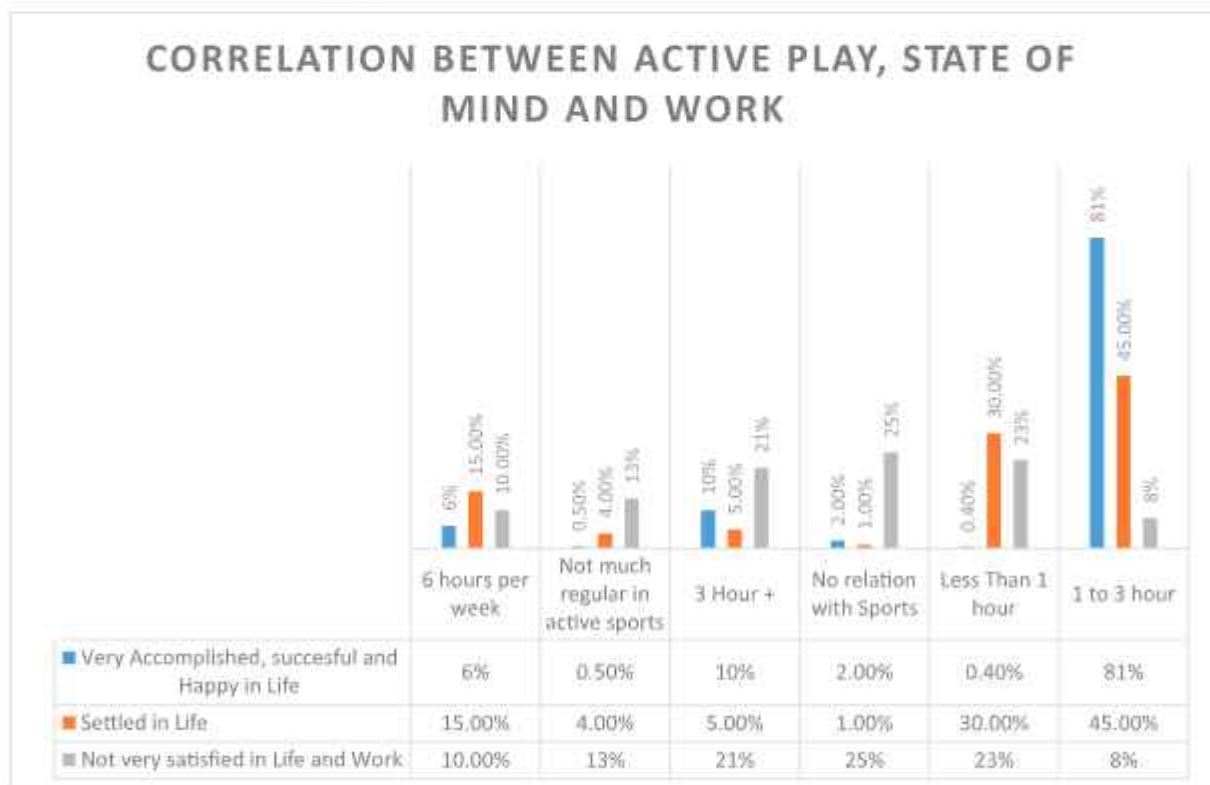
Relationship between "Not very Satisfied in Life and Work" to average time spent in active sports



There is a steep drop. People who are struggling and not happy are not that great active in sports.

CORRELATION BETWEEN SPORTS AND FITNESS IN LIFE

Correlation between active play, state of mind and work



CONCLUSION

Most successful persons are most regular and find time for active sports

People who are almost settled as they consider themselves, do have relation with active sports, but almost half of what "successful " people spend in playing

People who are struggling either don't play or hardly spend time in active play. This directly impacts their mental health and physical health and in long run impacts their overall performance in work.

99% of the people believe that both physical and mental fitness is important. 'Aesthetics' are the primary motivator for physical fitness. Laziness is found to be the main reason for lack of physical fitness, followed by lack of time. Irrespective of the average income of a household, the respondents showed a high understanding of the importance of physical and mental fitness.

Most of the respondents believe that people these days are living a very stressful life which has adverse effects on an individual's health.

Meditation and sports are the leading preferences to tackle the issue of mental health. The respondents indicated that Yoga seems to be more perceived as being more helpful to mental health than physical health.

Social media platforms do have a minimal effect on people in a negative, demotivating way. Thus, fitness related content on social media platforms are not really causing any adverse mental stress on people to get fit.

Diet trends are a major concern. People from different backgrounds do not follow proper diet plan. It's a good sign that fast food consumption trend is in lower side, but more thought needs to be put into whether the food people are eating is balanced or not. The fitter one will be, the healthier one will be.

The way forward:

Policy Recommendation

We as a society need to stress more upon the aspect of mental health and exercise to improve mental health. It was found that most people do understand the importance of mental health but are not doing much about implementing healthy practices. Physical Activity, sports, meditation and yoga can be made a part of curriculum in schools to develop a healthy lifestyle from a tender age.

Observation of trends and Opportunity for investors:

It can be observed from the survey that the most popular option for physical fitness is walking at about 53% and walking running and jogging consisted of about 72.5%.

People are inclined more towards these forms of physical activity for maintaining fitness.

Meditation is the most popular choice for mental health, followed by playing sports and yoga. Thus, it can be inferred that there are various opportunities for investment and entrepreneurship in these 3 segments.

There is scope in retail like apparel, shoes, smart wearable like fit bands, and other accessories. Mobile applications which facilitate tracking of one's fitness level, diet, sleep and which gives holistic reports about the data tracked, are also lucrative options that can attract people interested in being fit.

Companies like Fitbit are into the domain of smart wearables and trackers linked to mobile applications. Decathlon is an example of a retail giant catering to the fitness industry and satisfying the needs of those who want to engage in physical activity and Yoga specifically as well.

For those sections of people who have zero spending on club or gym memberships and yet exercise or want to exercise with guidance, apps may be developed, which comprise of tutorials related to exercise. These tutorials could be customised for different individuals, taking their biological and lifestyle parameters into account.



ANNEXURE



Methodology:

An online survey was conducted and distributed to urban population of various metropolitan cities in India. A qualitative analysis and quantitative analysis has been conducted on the collected data.

Various Descriptive Statistics have been given in the report. Hypothesis Testing has been done as well to check relationship between Fitness and other related factors

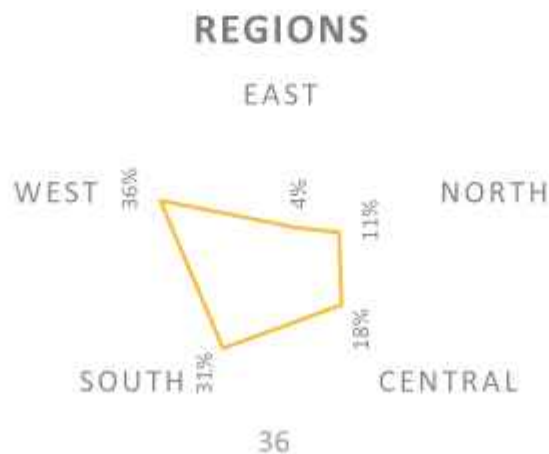
A Confidence of 95% percent was taken with 5% margin of error against India's population. The sample size is 2563.

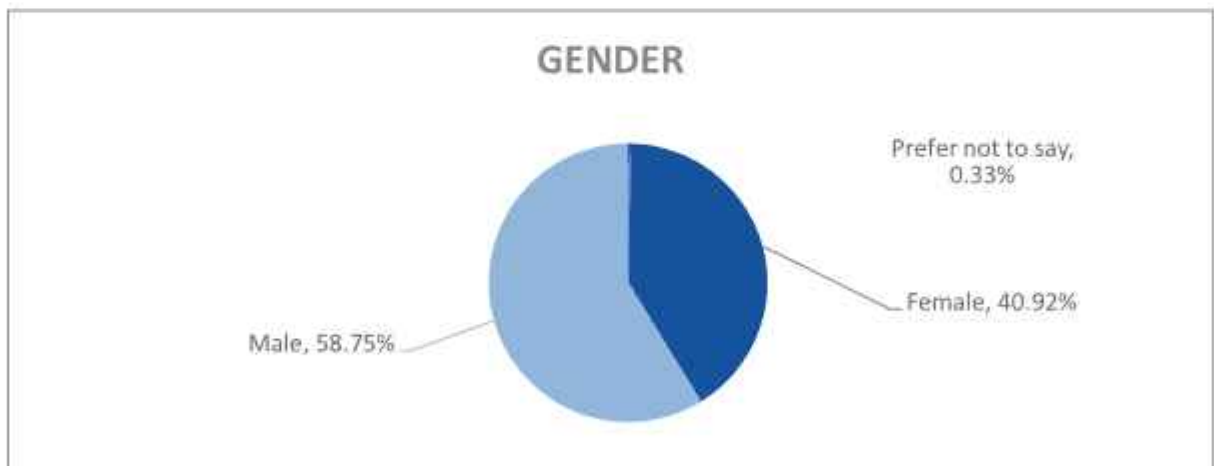
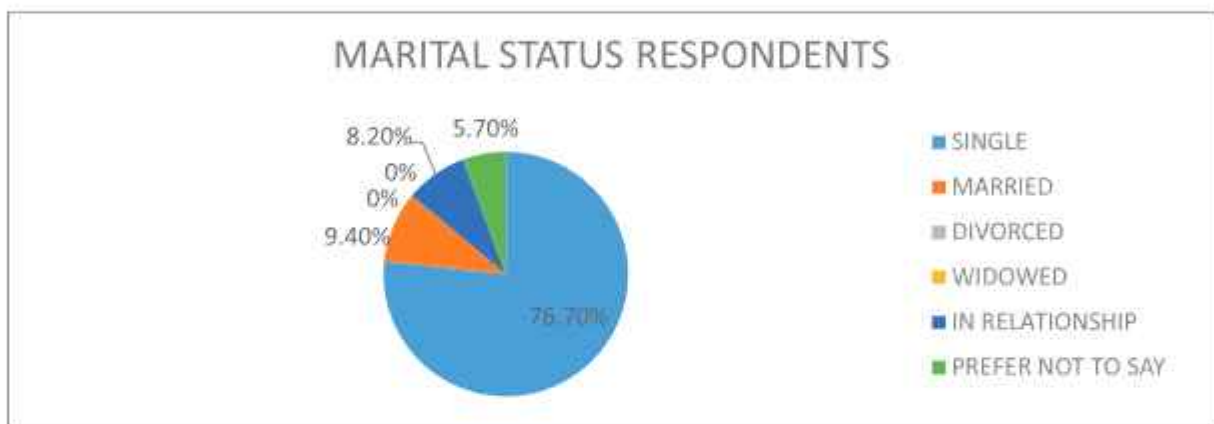
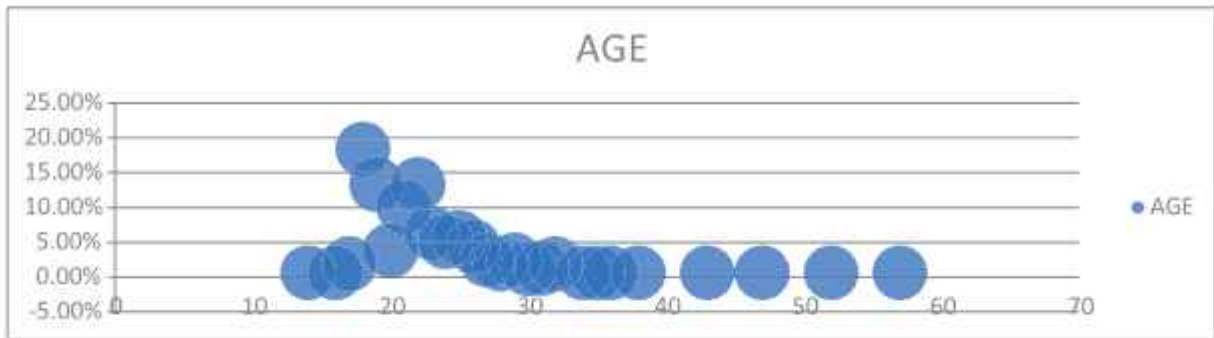
Methodology



DEMOGRAPHICS

The demographics of the respondents of the questionnaire that was rolled out about Fitness Trends are as follows:







All different segments of society have a good representation in terms of how much they earn in this sample.

This sample covers varied segments of the society in terms of annual family earnings. Thus, it gives an insight on the financial status of people and their fitness levels or inclination towards adapting fitness as a part of their lifestyle.

Pearson's Chi-squared test

data: tab1

X-squared = 11.416, do = 3, p-value = 0.009676

Pearson's Chi-squared test

data: tab2

X-squared = 23.685, do = 6, p-value = 0.0005968

ACKNOWLEDGEMENT

I am thankful to our students, faculty, design team and the FICCI Sports Committee for jointly producing this timely report, which should pave the way for future discussions with all the stakeholders and ensure that the industry goes from strength to strength in the years to come.

Regards

Mr. Amitava Pal
Associate Dean IISM

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