



Messe München

Connecting Global Competence

Opportunities for industry-wide growth: taking advantage of the increased importance of sports and outdoor activities

An expert review of the ISPO Re.Start Days

The ISPO Re.Start Days (30 June – 1 July 2020) provided answers to the current challenges in the sports and outdoor industry. Keynote lectures, panel discussions, studies and interactive workshops gave participants an opportunity to discuss best-case scenarios and potential solutions for guiding retailers, brands and suppliers out of the coronavirus crisis.



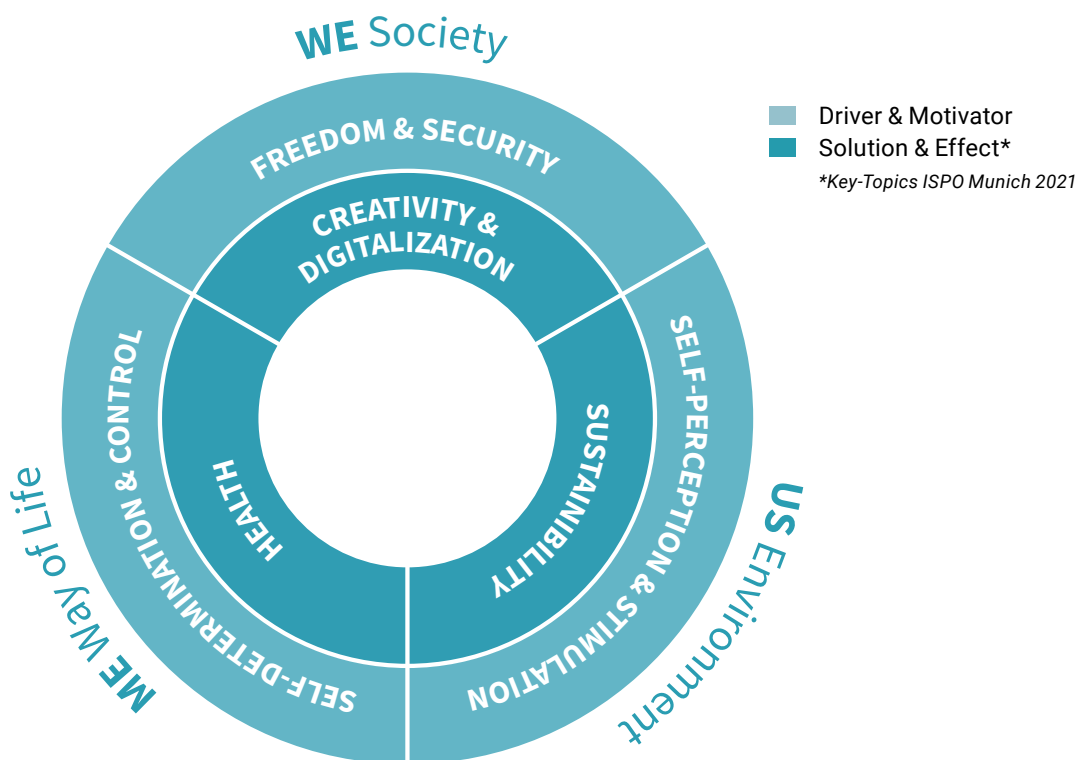
ISPO x rheingold institute
Obtaining the findings

In cooperation with the rheingold institute, this White Paper combines the findings of the ISPO Re.Start Days with additional insights to present three potential angles for future business strategies. The ISPO group and the rheingold institute aim to classify and assess the opportunities presented by current events in terms of sports and outdoor activities from an expert perspective for as many sectors as possible.

Sports as a vehicle for achieving increased relevance, reach and access to new target groups
ISPO - White Paper

Sports and outdoor activities are more than just an industry. They have become a means of reaching and supporting people on an emotional level. This strength has become especially apparent in the current pandemic.

The way in which society's need for sports and outdoor experiences has changed as result of the coronavirus crisis is revealing new, broader target audiences. This represents a tremendous opportunity. But what, exactly, is motivating people to fill this need? And what makes this an opportunity not just for the traditional sports and outdoor industry, but also for many other sectors?



Why sports and outdoor activities are ideal teammates for people affected by crisis: three hypotheses for a new, active future

In today's world, it's not about going higher, faster or further. Surrounded by rampant uncertainty, people are instead looking for stability and a new-found simplicity. All of us have experienced feelings of all-encompassing helplessness; all of us have been, and some of us still are, defenceless in the face of an invisible virus. Against the backdrop of these feelings of powerlessness, sports and outdoor activities are finding a new significance. They have proven their ability to support and motivate people, and are pointing the way to the "new normal".



In a society racked by uncertainty, outdoor experiences provide people with a temporary escape to a primal world in which they can enjoy proving themselves, appreciate the value of true friendship and experience the majesty of nature – all without digital filters.

The old world is ending, but the new world is not yet within reach. “It can’t stay like this, and it’ll never be the way it was before!” These are the words a rheingold study participant used to describe the strange, transitional world we currently live in.

Sports and the outdoors offer constructive responses to uncertainty in times of change. It is likely that there has never been a better opportunity for brands to satisfy their customers’ existential needs through products and services, and to act as trusted partners that provide their customers with direction.

Hypothesis 1: Using sports and outdoor activities to retain control over your own life

Need/Motivation: Self-determination/Control

Coronavirus restrictions have severely limited our sphere of activity and the experiences available to us. In addition to the feelings of helplessness this provokes, individuals struggle to cope with the accompanying loss of personal development opportunities. Activities such as roaming through forests, climbing mountains and catching fish engage our ancient instincts. Combined with surrendering ourselves to the magnificence of nature, physical exertion has a restorative effect that extends beyond the experience itself into our everyday lives. Open-air exercise allows us to feel in control not just of our own bodies, but also of our mental well-being. As such, enjoying activities in the fresh air fundamentally strengthens us and opens up new opportunities for creativity.

What does this mean for the future of brands and products?

At present, sports and outdoor activities meet precisely those human needs that are going unfulfilled. Companies that recognise this in their communications, or use the search for nature and self-awareness as a powerful hook for new target markets, will find interested audiences ready to listen. In doing so, they need not rely on tried-and-tested methods, but can achieve results through completely new approaches. Now more than ever, we need a wide range of options and offers that enable us to try out new things. People have liberated themselves from the requirement to be perfect – and the sector can take advantage of that by telling them to “Just go for it!” The openness to and demand for new and creative experiences have never been greater. People are looking for new activities that they can easily incorporate into their daily lives – and that they don’t need to immediately excel at. This not only generates a host of opportunities in sports, outdoor activities and tourism, but also provides openings for other industries to pivot to these areas. Mixing creativity, digitalisation, sports and/or outdoor activities currently leads to compelling combinations and concepts.



Hypothesis 2: Outdoor or indoor – safe and free

Need/Motivation:

Freedom & Safety

What's allowed? What isn't?

Our lives currently require a constant balancing act of freedom and responsibility. One way of escaping this tension for just a short while is to retreat into nature and create new freedoms for ourselves. As the danger and infection risk of the novel coronavirus is diminished when we are outside, nature has taken on a new level of importance in urban spaces.

On top of that, we can now choose to make use of the possibilities provided by digitalisation: we can use exercise apps and book digital coaches to train us in the comfort of our own homes. This allows us to responsibly exercise indoors – and to meet our need for community and interaction through online communities while social distancing.

These digital possibilities represent an ideal solution to the constant balancing of freedom and responsibility: both outdoors and indoors. And in doing so, they make our daily decisions easier and give us back control.

What does this mean for the future of brands and products?

Brands that equip their customers for sports and outdoor experiences do more than just facilitate the activity: they provide reliable protection for the adventure. They are the silent companions that ensure the experience goes safely and smoothly, but never take centre stage. Challenges are overcome by people, not their equipment! Nature has become part of the urban environment. Companies that succeed in creating experiences that make it easier to balance safety and freedom are helping to develop our new understanding of nature, sport and community. This holds significant growth potential for the sport, fitness and outdoor sector, as well as presenting many opportunities for other industries – from personal mobility to health to insurance.

Hypothesis 3: Reigniting our inner spark with sports and outdoor activities

Need/Motivation:

Self-image & Stimulation

Where's the spark?

It's easy to lose sight of our true selves when we spend most of our days indoors in a climate-controlled environment. Working at a computer divorces us from our senses and increasingly threatens the meaningfulness of our experiences. We are missing out on social events and important occasions like parties and presentations. Life right now feels muted and stale.

Exercise, particularly in nature, gives us a chance to really feel at home in our bodies again. We can enjoy the fresh air and the effort of exertion, and even look forward to the sore muscles we'll have later. It gives us an opportunity to (re)ignite our inner spark on a deeply individual level. This is undoubtedly one of the reasons that the number of joggers has ballooned during the coronavirus pandemic. And that energy gets carried right back into the home office.



What does this mean for the future of brands and products?

Brands need to ignite customers' inner spark and activate their desire to engage their senses. Not everyone is intrinsically motivated; some will need new incentives suited to the current moment. The many challenges cropping up on social media channels are a good example of this. Brands, too, have the option of setting these in motion, providing new social and digital events through community initiatives. Now more than ever, people need opportunities that embody empowerment and physicality and hold the promise of new energy. These include supportive spaces and platforms where they can both be inspired and share their own successes and achievements. We love nothing more than recounting our own stories of heroism. Right now, we need to strengthen people's ability to share, celebrate, and be rewarded for their achievements. By their very nature, sports and outdoor activities provide more opportunities than any other field for people to celebrate personal victories, to celebrate with others, and to come together as one. Brands – whether from the sports and outdoor industry or other sectors – that manage to authentically position themselves here, create added value or enable participation, will expand their reach and reap economically valuable goodwill.

The expert's conclusion

“ People are overwhelmingly going through a kind of reflective, clarifying process. They are creating a framework for how they want to live in the future,” explains lead researcher Marcel Beaufils. He says it is precisely in this context that brands must take action and demonstrate that they understand their customers – and that they are adapting alongside them. Doing this would allow brands to gain relevance, particularly during difficult times. “Domestic products have real power to win over and retain new target groups long-term here,” he adds. Sports and outdoor activities could also serve as an effective tool and approach for organisations in other industries looking to take advantage of this increased relevance and awareness: “This is particularly effective if implemented authentically and with careful regard for the three motivating factors described,” says Beaufils. “

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ISPO Munich will be held from 31 January to 3 February 2021 in a new physical-and-digital hybrid format. The conference welcomes everyone who wants to help further develop the growing significance of sports and outdoor activities.

Three key topics

Health: Health has gained an even greater significance.

Areas: From fitness to insurance and beyond.

Creativity & digitalisation: The true drivers and enablers of our “new culture”.

Areas: From creative professionals to software companies.

Sustainability: Many people are discovering the power of nature for the first time. The opportunities for a green revival have never been greater than they are today.

Areas: From transformed businesses and solution providers to NGOs.

Topic oriented Experience Halls at ISPO Munich 2021

Specially designed halls with integrated studios (for digital participants) and thematically arranged zones (including pre-built stands) devoted to these key topics and other important issues.

For more information and advice:

Contact Christian Herrmann via email: herrmann@ispo.com

or visit the website at ispo.com/munich