



RESEARCH RAPORT PART I











PHYSICAL ACTIVITY OF POLES DURING COVID-19 PANDEMY

BAROMETER OF CONSUMER MOODS AND BEHAVIOR DURING ISOLATION MEASUREMENT III

WARSAW, POLAND, MAY 2020.



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RESEARCH METHODOLOGY



THE PRESENTED DATA COME FROM CYCLICAL MEASUREMENT OF CONSUMER MOODS AND BEHAVIOR DURING THE ISOLATION "POLES DURING THE EPIDEMIC" (3RD WAVE).

THE SURVEY WAS CARRIED OUT ON APRIL 28-30, 2020 BY MEANS OF INDIVIDUAL ONLINE QUESTIONNAIRE INTERVIEWS (CAWI) ON THE SWPANEL.PL RESEARCH PANEL

THE STUDY WAS CARRIED OUT ON A REPRESENTATIVE GROUP OF ADULT POLES - THE SAMPLE STRUCTURE WAS ADJUSTED TO THE POPULATION STRUCTURE IN TERMS OF THE TOTAL DISTRIBUTION OF SEX, AGE AND PLACE OF RESIDENCE.

INTERVIEWS WERE CARRIED OUT WITH PEOPLE WHO BEFORE THE BEGINNING OF THE EPIDEMIC DECLARED THE USE OF GYM SERVICES, FITNESS CLUBS OR A PERSONAL TRAINER, AND WITH PEOPLE WHO ARE PLANNING TO START THE USAGE OF THIS TYPE OF SERVICE IN THE NEAR FUTURE.

THE FINAL RESEARCH SAMPLE WAS 800 RESPONDENTS

90% OF THE SAMPLE WERE PEOPLE WHO HAD DECLARED THE USE OF THE ABOVE SERVICES BEFORE THE EPIDEMIC.

THE QUESTIONS OF THE QUESTIONNAIRE WERE DESIGNED BY SW RESEARCH

RESEARCH SUMMARY



7 OUT OF 10 PHYSICALLY ACTIVE POLES DECLARE THAT THEIR LEVEL OF PHYSICAL ACTIVITY HAS DECREASED COMPARED TO THE PRE-EPIDEMIC PERIOD, OF WHICH NEARLY A THIRD (31%) DESCRIBES THIS DECLINE AS 'DECISIVE'.

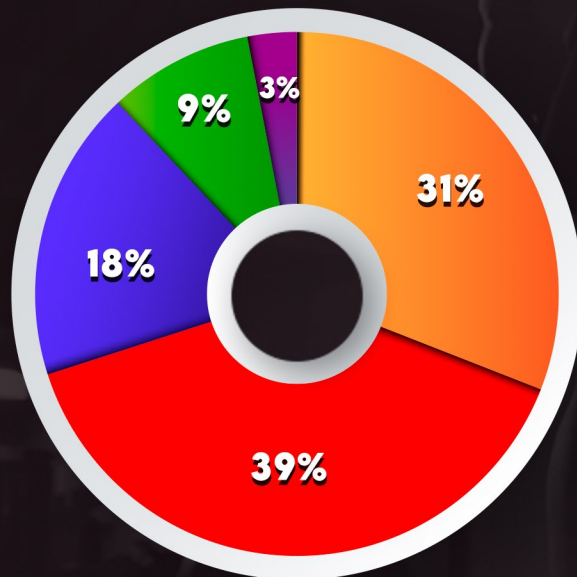
CLOSING OF GYMS AND FITNESS CLUBS IS THE SECOND MOST IMPORTANT INDICATE CAUSE (RIGHT AWAY AFTER "GENERAL DIFFICULTIES ASSOCIATED WITH THE EPIDEMIC") OF CAUSING A DECREASE IN PHYSICAL ACTIVITY - EVERY SECOND RESPONDENT (50%) HAS THIS OPINION. FOR EVERY FOURTH PERSON (24%) THIS REASON WAS INDICATED AS THE MAIN ONE, IN ADDITION - AMONG THE KEY REASONS, THIS WAS MENTIONED MOST OFTEN IN THE FIRST PLACE.

TWO-THIRDS OF PHYSICALLY ACTIVE POLES WOULD BE WILLING TO USE GYM SERVICES OR FITNESS CLUBS WITHIN 1 MONTH OF CLUB'S OPENING, AND ALMOST HALF (45%) WOULD BE READY TO VISIT THE CLUB NO LATER THAN WITHIN 2 WEEKS.

FOR PHYSICALLY ACTIVE PEOPLE, THE POSSIBILITY OF USING A FITNESS CLUB OR GYM IT IS PRIMARILY AN OPPORTUNITY TO IMPROVE YOUR OWN FIGURE, APPEARANCE (53%), FITNESS AND STRENGTH OR WELL-BEING (49% OF INDICATIONS). HEALTH CONSIDERATIONS ARE ALSO IMPORTANT (45%), WHILE SOCIAL, EDUCATIONAL OR RELATED ASPECTS ARE DEFINITELY LESS IMPORTANT WITH COMPETITIVE PRACTICE.

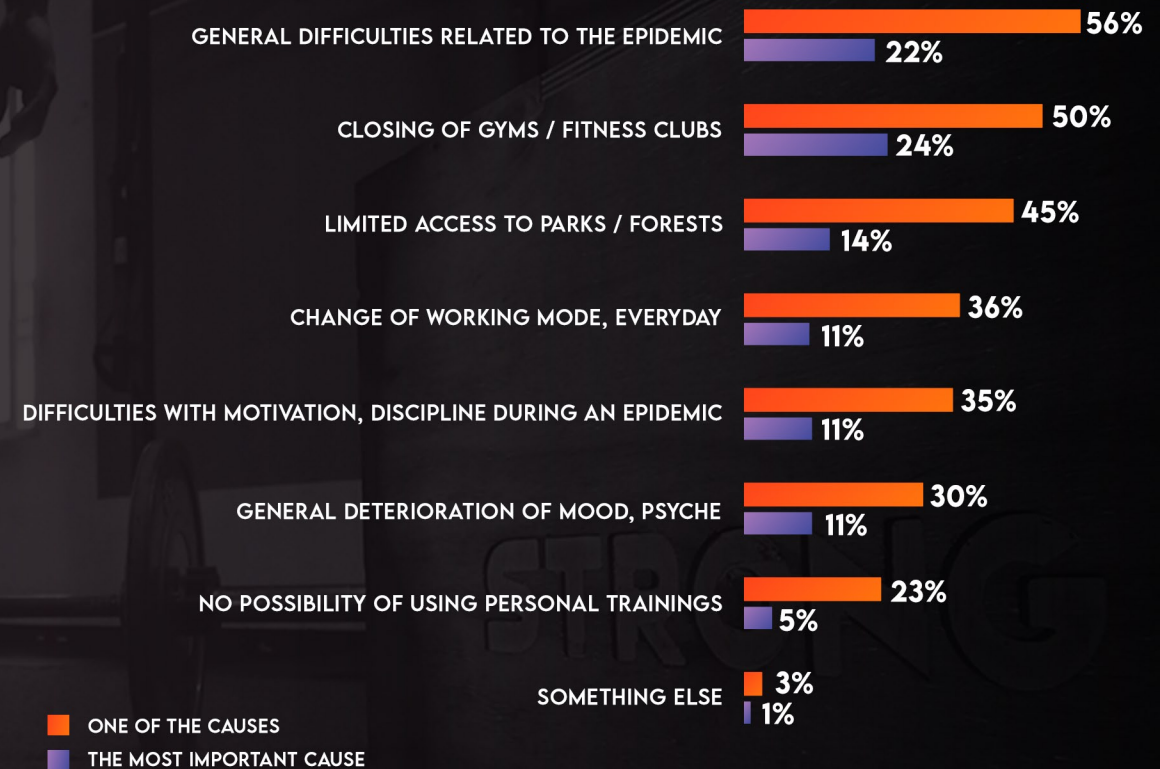
PHYSICAL ACTIVITY OF POLES BEFORE AND DURING EPIDEMIA

COMPARED TO THE PRE-EPIDEMIC PERIOD (EARLY MARCH)
HOW DO YOU RATE YOUR CURRENT LEVEL OF PHYSICAL ACTIVITY:
[N = 800]



- DEFINITELY DIMINISHED
- IT'S A BIT LESS THAN BEFORE
- STAY WITHOUT CHANGE
- IT'S A BIT INCREASE
- IT WAS DEFINITELY INCREASED

WHAT HAS PRIMARILY REDUCED THE LEVEL OF YOUR PHYSICAL ACTIVITY? *
[N = 534]

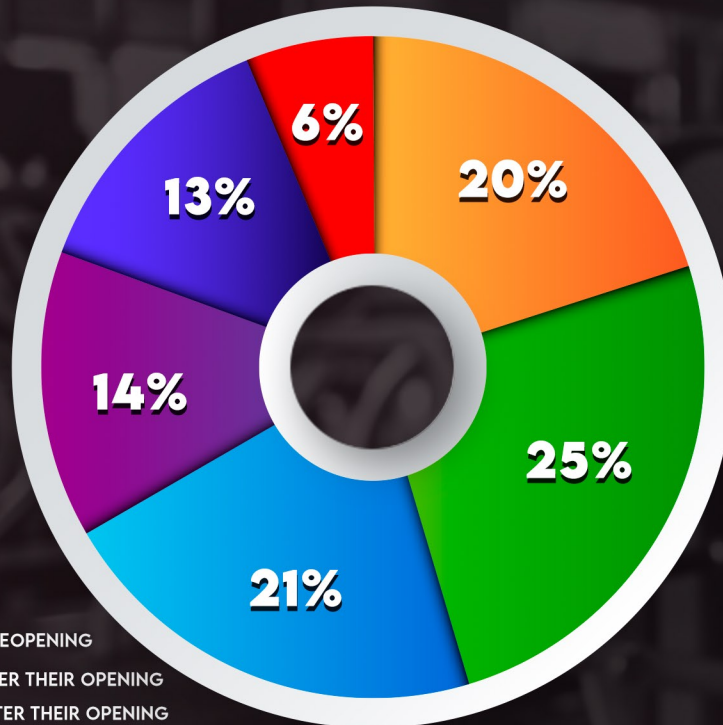


- ONE OF THE CAUSES
- THE MOST IMPORTANT CAUSE

* MULTIPLE CHOICE QUESTION (MAX. 3 ANSWERS).
TARGETED TO PEOPLE WHO HAVE DECLARED THAT THEIR LEVEL OF ACTIVITY HAS DECREASED COMPARED TO THE PERIOD BEFORE THE EPIDEMIC

READY OF POLES TO USE GYM SERVICES AND FITNESS CLUBS

ASSUMING THAT GYMS / FITNESS CLUBS MEET THE EPIDEMIC SAFETY REQUIREMENTS IMPOSED BY THE MINISTRY OF HEALTH
AND SANEPID, WHEN WOULD YOU BE WILLING TO USE THEIR SERVICES?
[N = 800]

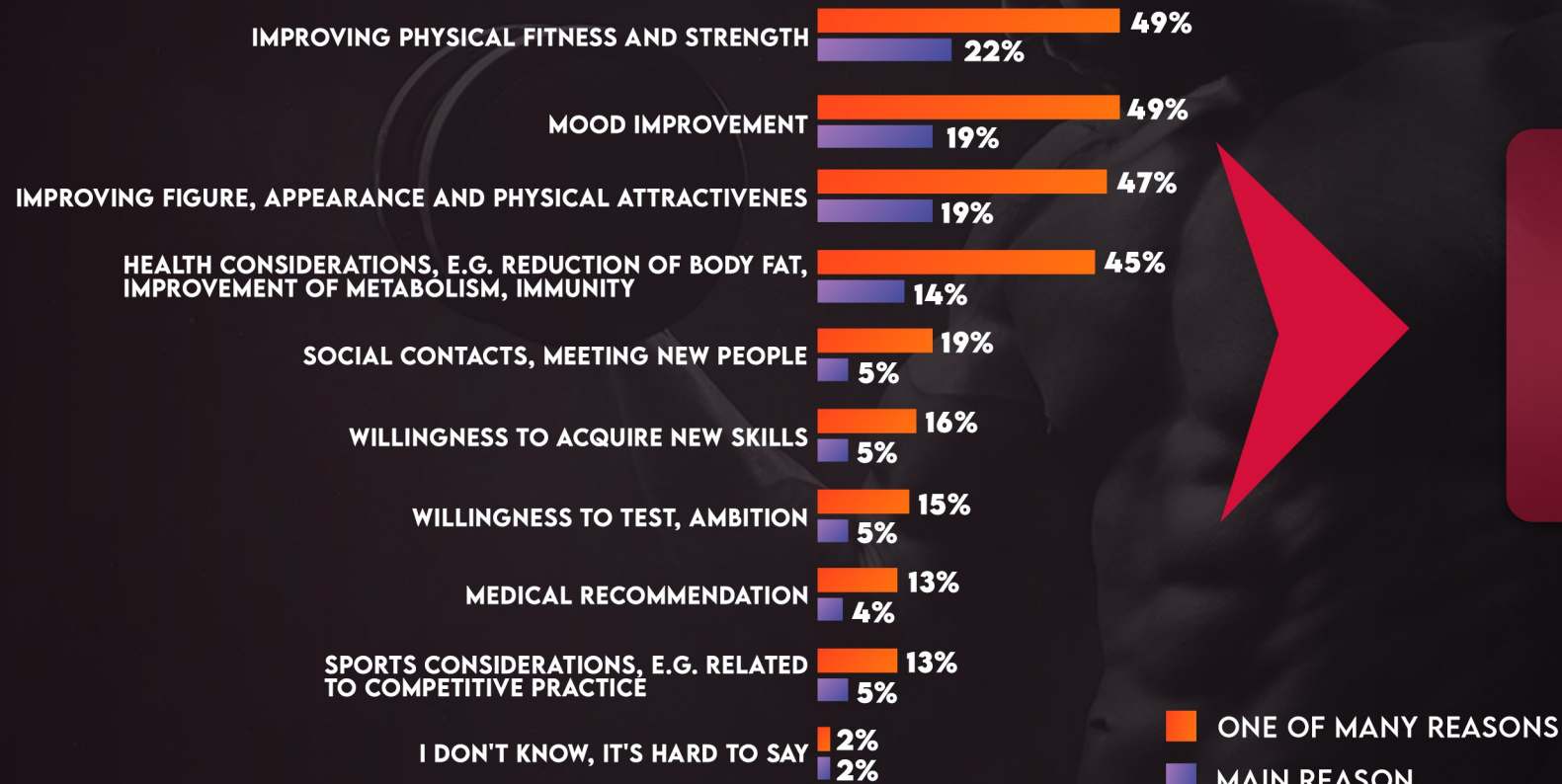


- RIGHT AFTER REOPENING
- 1-2 WEEKS AFTER THEIR OPENING
- 2-4 WEEKS AFTER THEIR OPENING
- 1-2 MONTHS AFTER THEIR OPENING
- NOT EARLIER THAN 2 MONTHS AFTER THEIR OPENING
- NOT AT ALL

**66% OF PEOPLE
NOT LATER
THAN A MONTH
AFTER OPENING**

MOTIVATION OF POLES TO USE GYM AND FITNESS CLUBS

WHAT MAKES YOU WANT TO CONTINUE OR START USING GYM / FITNESS CLUB SERVICES?
[N = 800] *



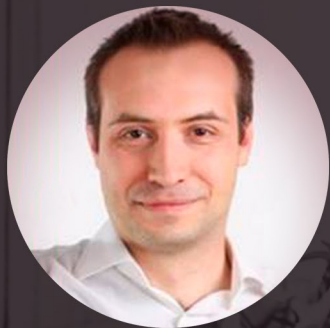
**NEARLY HALF
SHOWS
HEALTH,
FIT FIGURE,
OR JUST WANT
TO FEEL WELL.**

* MULTIPLE CHOICE QUESTION (MAX. 3 ANSWERS).

EXPERT'S OPINION



WIDESPREAD ISOLATION IN CONNECTION WITH THE COVID-19 PANDEMIC HAS NOT BYPASSED THE FITNESS INDUSTRY, MOREOVER, IT HAD TO BRAKE AT THE EARLIEST. AFTER MINISTERIAL ORDINANCE IN FORCE SINCE MARCH 14, IN PRINCIPLE, THOUSANDS OF CLUBS WERE CLOSED ALL OVER THE COUNTRY, FROM DAY TO DAY TO MILLIONS OF POLISH MEN AND WOMEN. THE RESULTS OF OUR LAST MEASUREMENT SHOW THAT FOR ALMOST HALF OF THE ACTIVE SOCIETY, THE USE OF GYM AND FITNESS SERVICES IS PRIMARILY DUE TO THE NEED TO CARE FOR YOUR OWN HEALTH, WELL-BEING AND APPEARANCE. FOR MOST OF THEM, LIMITING ACCESS TO THESE SERVICES MEANS A SIGNIFICANT DECREASE IN PHYSICAL ACTIVITY, WHICH CAN TRANSLATE INTO NEGATIVE PSYCHOLOGICAL OR SOCIAL EFFECTS. ACTIVE POLES GIVE A CLEAR SIGNAL FOR THE INDUSTRY, SEEING HOPE IN THE RAPID IMPROVEMENT OF THE SITUATION - THEY DECLARE ALMOST IMMEDIATE READINESS TO USE FITNESS SERVICES IN A FEW WEEKS AFTER RE-OPENING THE CLUBS, SUBJECT TO COMPLIANCE WITH RELEVANT SANITARY STANDARDS.



PIOTR ZIMOLZAK
VICE PRESIDENT
SW RESEARCH

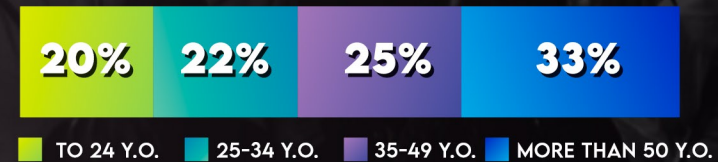
DEMOGRAPHIC STRUCTURE

DETAILS OF THE STUDY GROUP DIVIDED INTO THE FOLLOWING 4 CATEGORIES:

GENDER



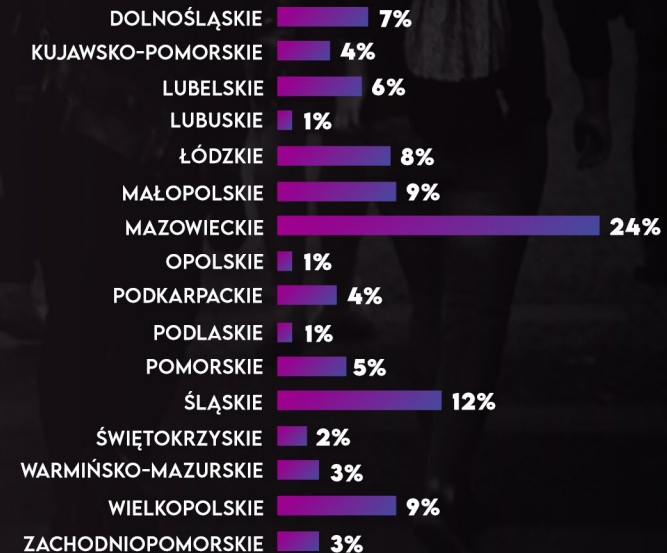
AGE CATEGORY



SIZE OF CITIES

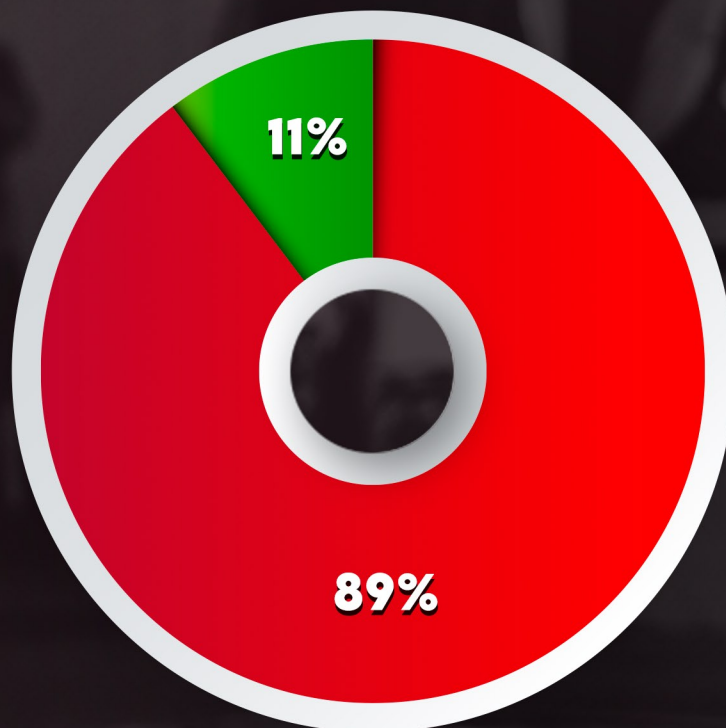


VOIVODESHIP



INACTIVE AND DEACTIVE - IMPACT OF PANDEMY AND QUARANTINE PERIOD ON CHANGE APPROACH TO PHYSICAL ACTIVITY

ANOTHER STUDY ON A GROUP OF PEOPLE WHO HAVE NOT EXERCISED IN FITNESS CLUBS FOR MIN. 5 YEARS OR AT ALL. THE GROUP ANSWERED THE QUESTION:
AFTER A PANDEMIC, ARE YOU GOING TO START REGULAR TRAINING, E.G. IN A FITNESS CLUB OR GYM?
[N = 533]



- YES, I WANT TO USE GYM OR FITNESS CLUB TYPE SERVICES.
- NO, I DO NOT INTEND TO USE THESE SERVICES.

**11% OF RESPONDENTS,
ARE POTENTIALLY
NEW CUSTOMER GROUP
TO THE FITNESS
INDUSTRY SECTOR**

The background of the entire page is a photograph showing several people, mostly men, standing behind a red, crinkled plastic barrier. They are looking through the barrier, and their hands are visible as they touch or hold onto it. The scene appears to be a queue or a restricted access point, likely during the COVID-19 pandemic. The lighting is somewhat dim, and the overall tone is somber and restrictive.

RESEARCH REPORT PART II

THE ECONOMIC SITUATION OF THE POLISH FITNESS INDUSTRY DURING THE EPIDEMIC

DETAILED ANALYSIS AFTER 60 DAYS OF INABILITY TO RUN BUSINESS BY FITNESS CLUBS
AND OTHER SPORTS FACILITIES IN THIS SECTOR

WARSAW, POLAND, MAY 2020.

RESEARCH METHODOLOGY

DATA ON THE SITUATION IN FITNESS CLUBS WERE COLLECTED DURING THE SURVEY TELEPHONE, IN WHICH OWNERS OF FITNESS CLUBS AND OTHER SPORTS FACILITIES FROM A GIVEN SECTOR OF THE FITNESS INDUSTRY TOOK.

THE STUDY WAS CARRIED OUT EXACTLY 60 DAYS FROM THE DATE OF CLOSING ALL SPORTS FACILITIES, SUCH AS: FITNESS CLUBS, GYMS, SWIMMING POOLS, DANCE SCHOOLS, EMS STUDIOS, PERSONAL TRAINING STUDIOS, CROSSFIT BOXES, FITNESS STUDIOS, AND MARTIAL ARTS SCHOOLS.

THE FINAL RESEARCH GROUP WAS 300 RESPONDENTS [CLUB OWNERS].

QUESTIONS NECESSARY FOR THE ABOVE ANALYSIS WERE PREPARED BY THE POLISH FITNESS FEDERATION ASSOCIATING FITNESS CLUBS THROUGHOUT POLAND.

RESEARCH SUMMARY

**OVER 30% OF ALL SPORTS CLUBS AND FACILITIES DISMISSED OVER 4 PEOPLE, IN MANY CASES IT CONSTITUTES AT LEAST HALF OF THE SO-CALLED BASIC STAFF
- RECEPTION, MANAGER, PERSONAL TRAINER.**

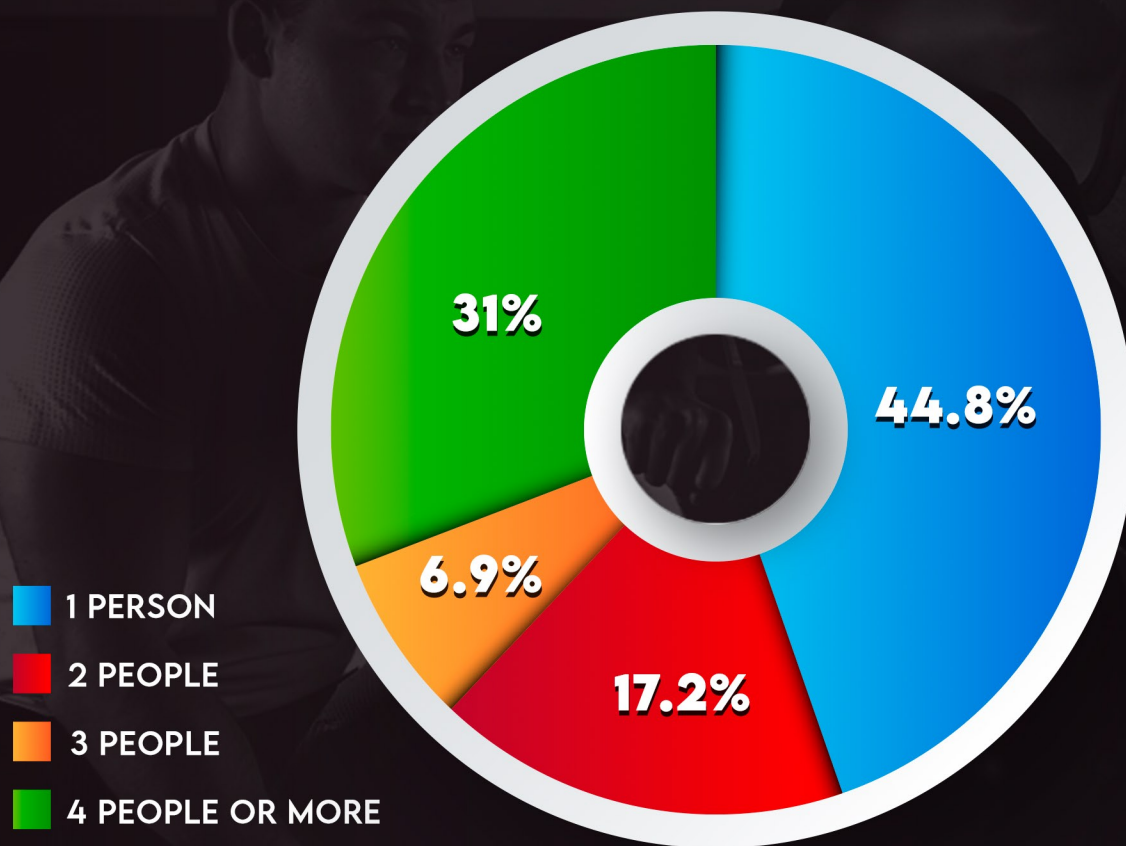
56% OF OWNERS DID NOT USE THE ANTI-CRISIS SHIELD DUE TO LACK OF POSSIBILITIES QUALIFY FOR MOST PROGRAMS. FOR THE REMAINING 44%, THEY WERE MAINLY: EXEMPTIONS FROM THE SOCIAL INSURANCE INSTITUTION [35.3% USING THE SHIELD], "PARKING" FOR EMPLOYEES [28.8% USING THE SHIELD] AND A LOAN OF PLN 5000.00 [25.5% USING THE SHIELD]

OVER HALF OF THE RESPONDENTS INDICATED THAT THEY WOULD NOT LAST LONGER THAN A MONTH IF THE LOCKDOWN WAS EXTENDED FOR THE FITNESS SECTOR. THE VAST MAJORITY OF RESPONDENTS INDICATED AS AT 01/06/2020 AS THE FINAL IN TERMS OF OPENING THE INDUSTRY TO AVOID BANKRUPTCY AND INSOLVENCY.

THE LAST PART CONCERNS INFORMATION ON DEFINITIVE CLOSURES OF FACILITIES IN THE NEAR AREA. HERE, OVER 34% OF RESPONDENTS GAVE A POSITIVE ANSWER.

EMPLOYMENT SECTION AND EMPLOYEE REDUCTION STRUCTURE IN THE FITNESS INDUSTRY

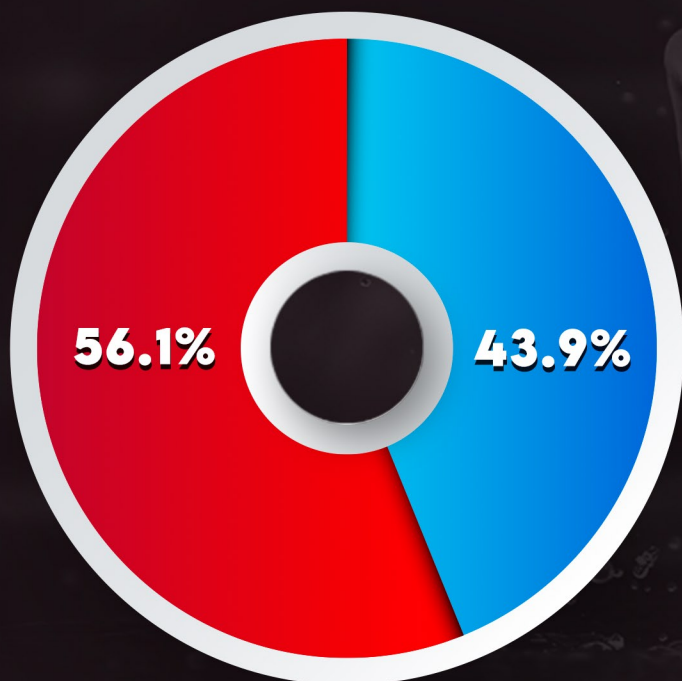
HOW MANY PEOPLE WERE LAID OFF AT YOUR FITNESS CLUB [OR OTHER FACILITY IN THE SECTOR YOU OWN]
DURING THE COVID-19 PANDEMIC?
[N = 300]



**38% OF RESPONDENTS
CLUB OWNERS
FITNESS AND SPORTS
FACILITIES FIRED AT LEAST
3 PEOPLE OR MORE.**

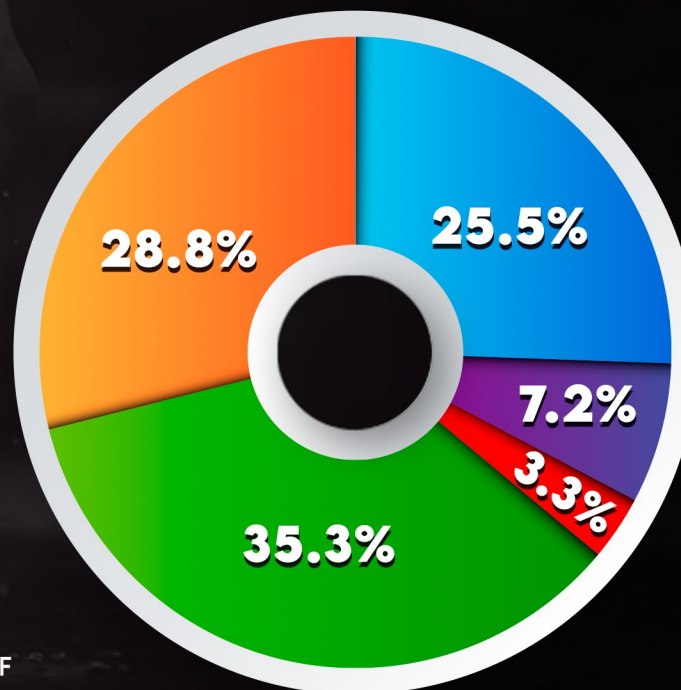
LEVEL OF USING THE "POLISH GOVERNMENT ANTI-CRISIS SHIELD" IN THE FITNESS INDUSTRY

HAVE YOU MANAGED TO USE THE "ANTI-CRISIS SHIELD"
PROPOSED BY THE GOVERNMENT?



■ YES
■ NO

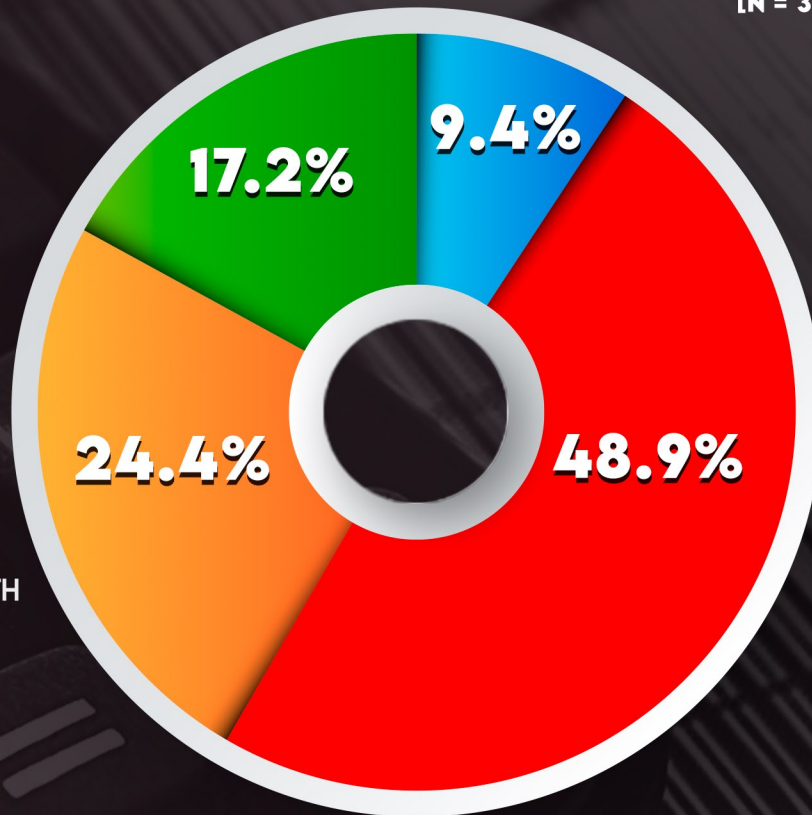
IF YES, WHAT EXACTLY HAS IT BEEN USED?
[POSSIBLE MULTIPLE CHOICE AMONG RESPONDENTS]



■ RENT RELIEF
■ PFR SUBSIDY
■ LOAN [PLN 5,000]
■ SALARY SUBSIDY
■ EXEMPTION FROM ZUS [INSURANCE]

ECONOMIC SITUATION AND FINANCIAL CONDITION OF THE FITNESS INDUSTRY

IN HOW MANY MONTHS WILL YOU BE FORCED TO CLOSE YOUR FITNESS CLUB DUE
TO YOUR INABILITY TO GENERATE REVENUE?
[OR OTHER OBJECT YOU OWN IN THE FITNESS SECTOR]
[N = 300]

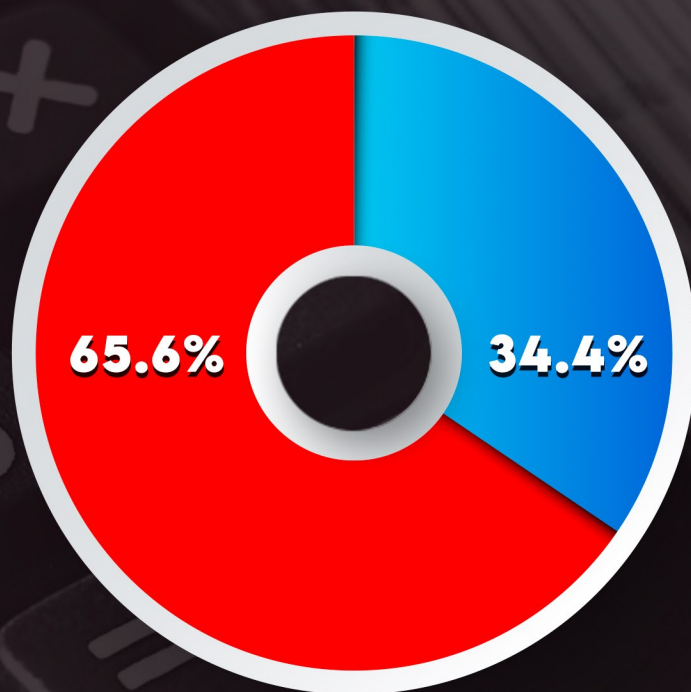


- LESS THAN 1 MONTH
- 1 MONTH
- 2 MONTHS
- 3 MONTHS

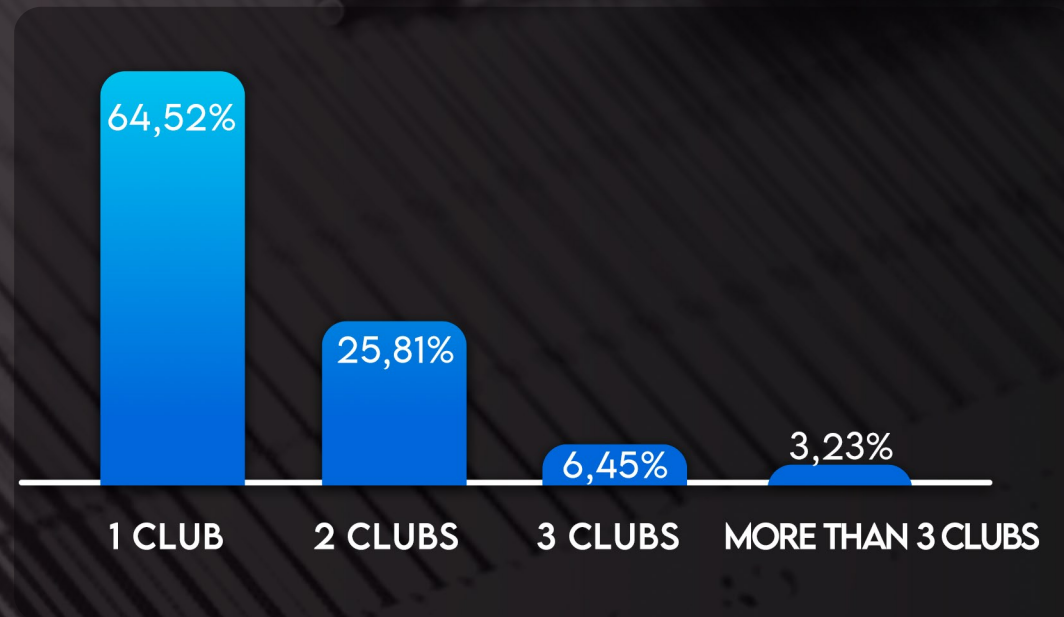
**59% OF CLUBS AND FACILITIES
WILL NOT LAST LONGER
THAN MONTH OF BUSINESS BAN
[COUNTING FROM THE DAY
OF THE STUDY- 10/05/2020]**

ECONOMIC SITUATION AND FINANCIAL CONDITION OF THE FITNESS INDUSTRY

HAVE YOU HEARD OF THE FINAL CLOSURE OF COMPETING CLUBS
FITNESS [OR OTHER OBJECT YOU OWN IN THE FITNESS SECTOR] IN YOUR AREA?
[N = 300]



HOW MANY FITNESS CLUBS [OR OTHER FACILITIES IN THIS SECTOR]
HAVE CLOSED DOWN IN YOUR IMMEDIATE AREA?



■ NO
■ YES

FINAL COMMENT - EXPERT'S OPINION

THE FITNESS INDUSTRY WAS CLOSED FIRST, DEVOID OF 100% INCOME, AND IS THE LAST ONE OPENED. IT IS ONE OF THE MOST AFFECTED SECTORS OF THE ECONOMY IN POLAND. BEFORE THE PANDEMIC, POLAND WAS 7TH IN EUROPE IN TERMS OF THE TOTAL VALUE OF THE FITNESS INDUSTRY MARKET.

IN ADDITION TO THE COLLAPSE ASSOCIATED WITH THE NEED TO CLOSE ALL FACILITIES, THE INDUSTRY WILL SOON ALSO BE AFFECTED BY THE DESTRUCTIVE IMPACT OF OTHER ECONOMIC FACTORS, INCLUDING REDUCED INVESTMENT DEMAND, A DECLINE IN GDP GROWTH AND SOCIETY'S IMPOVERISHMENT.

THE FITNESS INDUSTRY IS AN INSEPARABLE ELEMENT OF THE HEALTH SECTOR AND ONE OF THE TOOLS IN THE FIGHT AGAINST MANY DISEASES, BY STRENGTHENING THE HUMAN BODY AS A RESULT OF PHYSICAL ACTIVITY, AND THUS
- FINAL BUILDING OF RESISTANCE.



TOMASZ NAPIÓRKOWSKI
CEO & FOUNDER
POLISH FITNESS FEDERATION

