



THE NEXT FITNESS CONSUMER 10 KEY FINDINGS

An ABC Fitness Solutions Report

Research administered by



FITNESS
SOLUTIONS

SUMMARY

The concept of change is inevitable, as seen with this past year's disruption of the COVID pandemic. The impact has been far-reaching, necessitating proverbial changes every industry and every consumer will have to contemplate.

Albert Einstein eloquently stated, "You can't use an old map to explore a new world."

As our new world emerges, understanding shifts with the consumer is paramount to the rebirth and growth of an industry we have all poured our hearts and souls into. This study reveals the latest dynamic behaviors, beliefs, and motivators of The Next Fitness Consumer beyond traditional demographics.

The insights presented in this report will inform how we must deliver a personalized and curated member experience with our offerings, programming, and communications. How can we continue to innovate and anticipate the evolving wants and needs of those who have an interest in living an active, healthy lifestyle?

This report shows us that delivering the Total Fitness Experience wherever fitness is consumed is the only way forward.

**YOU CAN'T USE AN
OLD MAP TO EXPLORE
A NEW WORLD.**

FITNESS IS BROADER THAN JUST PHYSICAL EXERCISE, AND IS INCLUSIVE OF MENTAL HEALTH AND ACUITY



2/3 OF AMERICANS REPORT THEY ARE CURRENTLY ACTIVE

The pandemic has accelerated a pre-covid trend of increasing interest in health and fitness. The majority of Americans believe they are currently living an active lifestyle (66%); indicating that consumers have broadened their definition of health and wellness. This is also evident when examining overall motivation.

TOP 3 EXTRINSIC FITNESS MOTIVATORS FOR CONSUMERS

1 46%
being active

2 35%
mental wellbeing

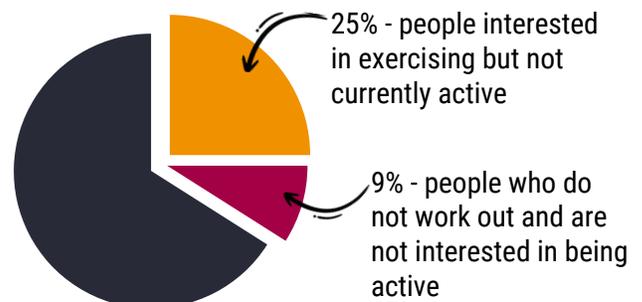
3 32%
weight loss

Improving mental acuity ranks fourth as an extrinsic fitness motivator, closely behind the top three perceived exercise rewards of feeling good, the sense of accomplishment, and improved physical appearance.

It's no secret, the next fitness consumer is aware of the mental and cognitive benefits of regular exercise. Club operators should educate the staff, particularly fitness professionals, on how exercise benefits mental health and cognition.

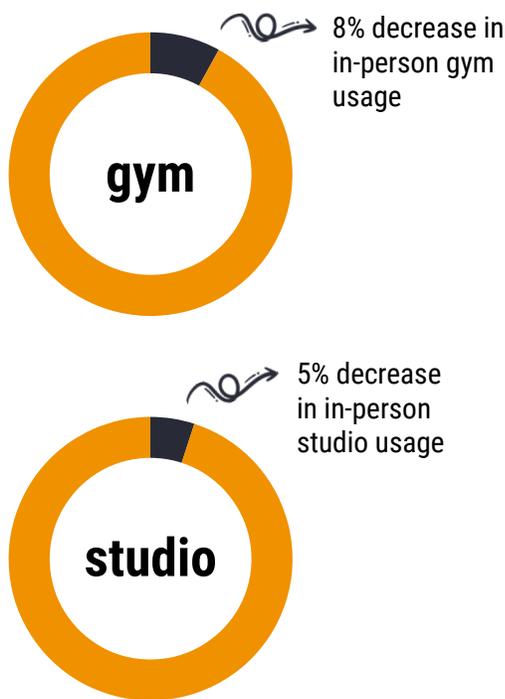
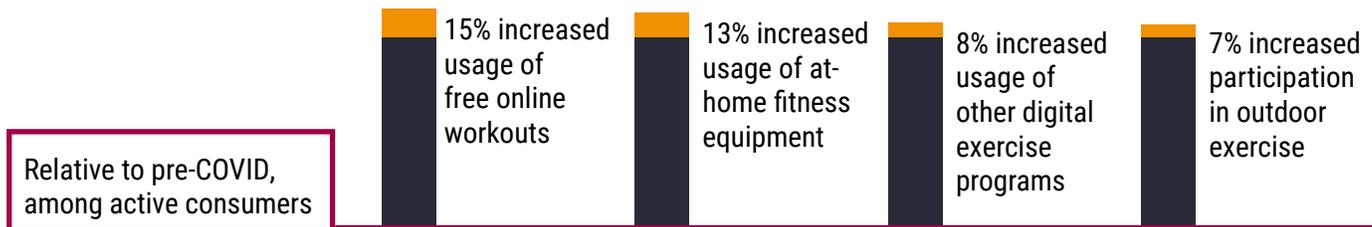
Also, consider implementing initiatives promoting the mental wellness benefits of physical activity as a supplement to your regular programming.

The inactive segment who has an interest in working out represents an opportunity for fitness businesses and professionals. Understanding and addressing their attitudes, motivations, and barriers towards working out is critical to successfully shifting their current behaviors in favor of becoming active.



DELIVER FITNESS WHERE CONSUMERS ARE, OUTDOOR ACTIVITIES, DIGITAL/ONLINE WORKOUTS ARE HERE TO STAY

As consumers gradually return to their gyms and studios, home and online fitness engagement continues. Use of at-home workout options now exceeds that of health clubs and fitness studios.

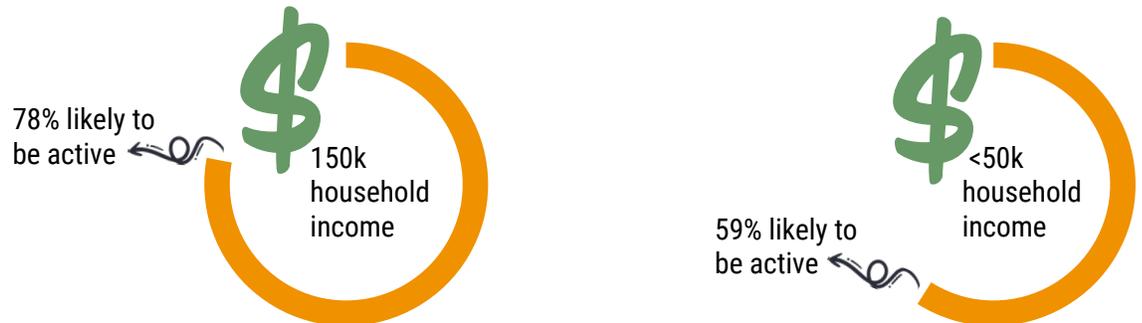


Club operators that have employed a hybrid approach to fitness delivery via live or on-demand workouts can benefit from the staying power of home and online fitness. Digital fitness content can be an effective pre-sales tool as a trial offer and/or a standalone membership option.

The use of at-home digital has been an effective source for improving the active consumers' level of fitness and is integral toward achieving their fitness goals. Delivering the Total Fitness Experience is not about the "or" but rather the "and": convincing the at-home user to return to and/or use brick-and-mortar gyms will require clear messaging on the benefits and value proposition of what gyms have to offer that is complementary or adds value to their at-home regimen.

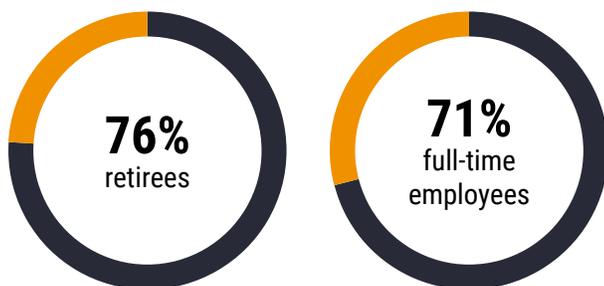
REGULAR EXERCISE MAY BE A PRIVILEGE OF THE WELL-OFF, DESPITE GROWING FITNESS AWARENESS

This highlights the need of the fitness industry to overcome barriers of inequity.

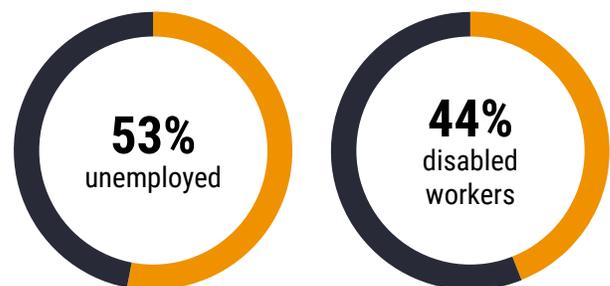


1/3 OF AMERICANS FROM THE LOWEST INCOME GROUP OBSERVED DO NOT WORK OUT BUT ARE INTERESTED IN REGULAR ACTIVITY

HIGHEST ACTIVITY RATES



LOWEST ACTIVITY RATES



Among the disabled, **40%** that do not exercise are interested in getting active. This interest ranks highest among all demographic groups observed in the report, providing fitness businesses with an opportunity to build programs and offerings inclusive to individuals with disabilities.

FITNESS CLUB AND STUDIO WILL REMAIN THE GO-TO HUBS OF ACTIVE CONSUMERS

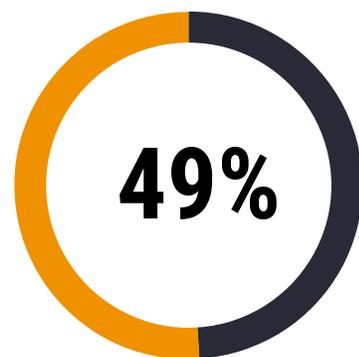
Four of the five most relevant exercise modalities among active consumers are featured in the vast majority of big box gyms and fitness studios. Cardio equipment training, flexibility/stretching, free-weight training, equipment-based exercise classes, and health/wellness coaching round out the top 5.

The exercise preferences of active consumers attest to the gyms and studios as the go-to hubs of fitness and wellness. As you re-engage members and attract new prospects, keep the attractions of your clubs upgraded regularly, in working order, and in compliance with safety guidelines. The next fitness consumer values what fitness clubs have to offer and is poised to engage with gyms and studios now and in the future.

AMONG THOSE WHO PREVIOUSLY CANCELED THEIR MEMBERSHIP AT BIG-BOX GYMS, HALF SAY THEY PLAN ON RETURNING IN THE NEXT 6-12 MONTHS

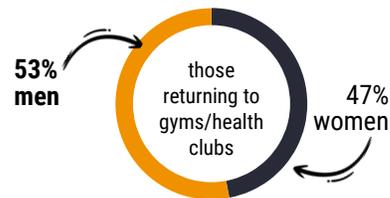
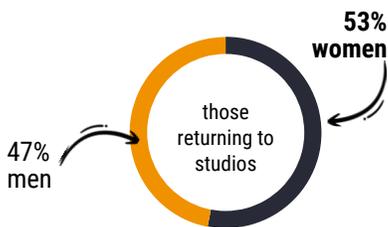
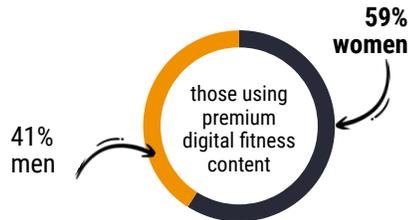
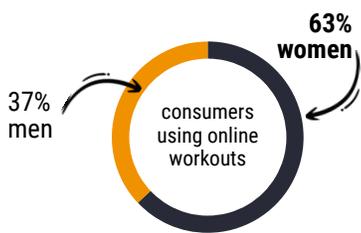
Although the pandemic negatively impacted membership numbers with unprecedented cancellations, 49% of those who canceled are eager to rejoin their health/fitness clubs.

With the previously mentioned reduction in monthly expenditures, affordability and convenience are key drivers for their decisions to join. Additionally, these individuals are looking for a more welcoming and less intimidating atmosphere at the gym.



THE PANDEMIC'S AFFECT ON THE "NEXT FEMALE FITNESS CONSUMER" VS THE "NEXT MALE FITNESS CONSUMER"

Males are more likely to have returned to brick-and-mortar clubs, while females may be more likely to engage in digital and at-home fitness. Relative to active men, active women are less likely to have resumed in-person fitness activities since the pandemic started.



Leverage the fitness universe of the active woman. Pre-pandemic, IHRSA's Health Club Consumer Report showed that women utilized a variety of in-club attractions, including exercise classes and training equipment, while men favored fitness equipment and sports amenities.

Use online delivery to showcase your star yoga instructors, standout dance classes, or top-notch Pilates equipment. If this approach doesn't reel in active females to your club in-person, it may help your business attract new digital-only members.

According to a separate study by the Physical Activity Council, three of the five fitness activities that were the largest gainers over the pandemic, yoga (+7.8%), Pilates (+7.2%), and dance/choreographed exercise (+5%) skew towards women.

GEN Z VALUES FUN & SENSE OF ACCOMPLISHMENT FROM REGULAR EXERCISE, ALONG WITH EXPERTISE & ACCOUNTABILITY OF FITNESS COACHING

GEN Z **59%** OF GEN Z CONSUMERS REPORT BEING ACTIVE

while a separate **31%** indicate interest in regular exercise.

Active Gen Z'ers are slowly returning to brick and mortar as their share of gym and studio usage is down relative to pre-pandemic at **-1% and -7%**, respectively. But the post-Millennials' exercise motivators and regimen preferences bode well for fitness clubs.

The 18-24 age group inherently enjoys exercise as fun ranks high as an intrinsic motivator. The sense of accomplishment ranks first as an extrinsic motivator for exercising.

Generation Z has also increased in-person personal training usage pre-pandemic (**+3%**). The youngest adult cohort values premium coaching, is committed to regular exercise, and may actually delight in staying active.

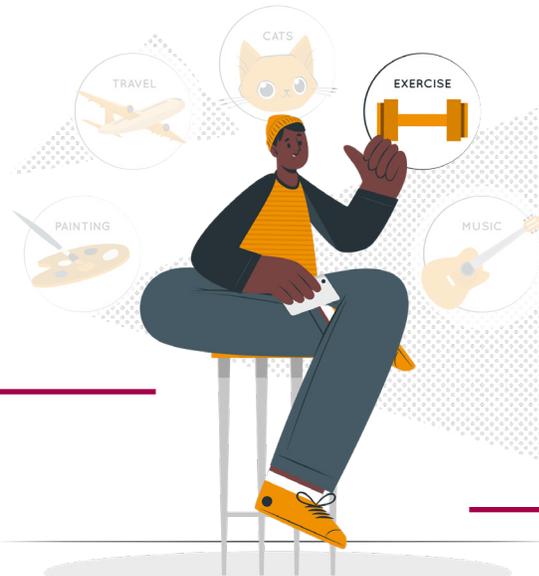
Make sure your fitness coaches can match this enthusiasm with high-level expertise and accountability techniques.

POST-COVID, THE ACTIVE MILLENNIAL CONSUMER HAS PENT-UP DEMAND FOR IN-CLUB FITNESS

The health benefits and confidence boost associated with working out rank high as motivators. Consistent with older age groups, the health benefits of regular exercise rank high as an intrinsic motivator, while building self-confidence is the number one extrinsic motivator.

64%

Nearly 2 out of 3 Millennials indicate being active, the second highest of observed age groups.



BEFORE COVID

32%

gym/health club consumers that are Millennials

40%

studio consumers that are Millennials

36%

AFTER COVID

48%

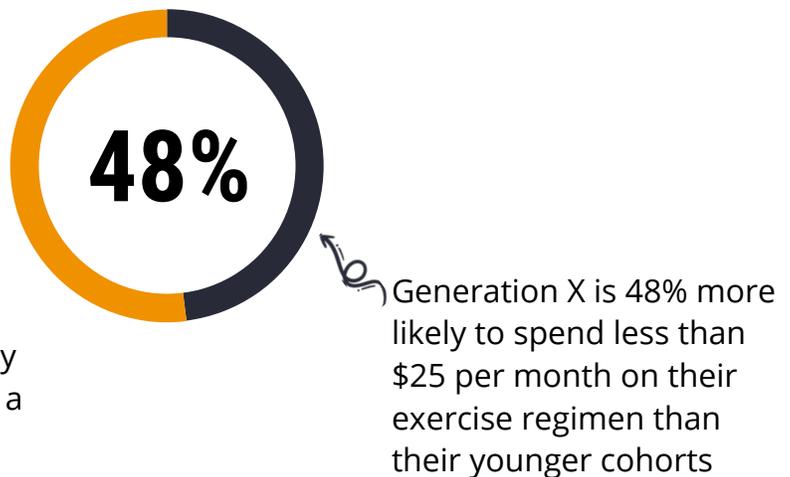
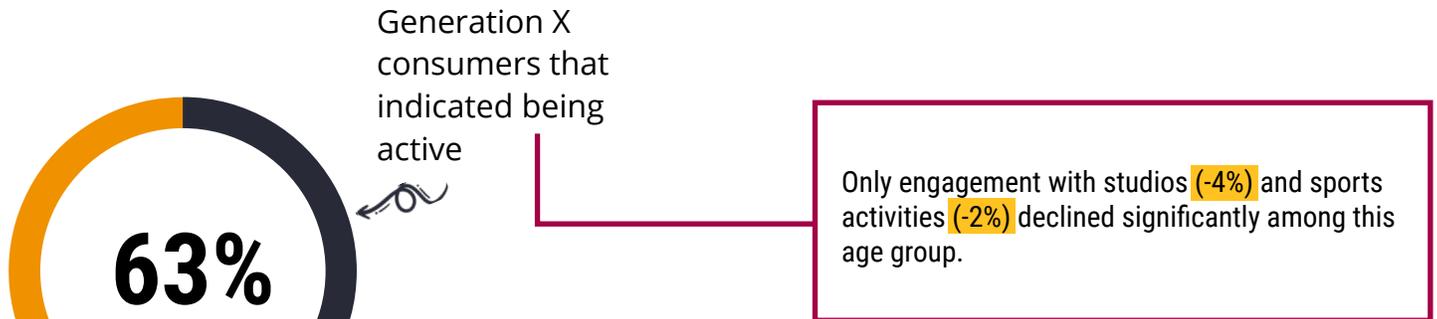
27%

More than 1 out of 4 Millennials do not work out but are interested in getting started

Millennials are the bread and butter of the fitness club industry and more likely than any other generational group to belong to a health club, gym, or studio. They also likely expect their fitness club to offer digital fitness content. Meet their needs with live and on-demand exercise classes and programs that mirror the experience and feel of your club or studio.

THE EXERCISE REGIMEN OF GENERATION X REMAINED RELATIVELY STABLE THROUGHOUT THE PANDEMIC

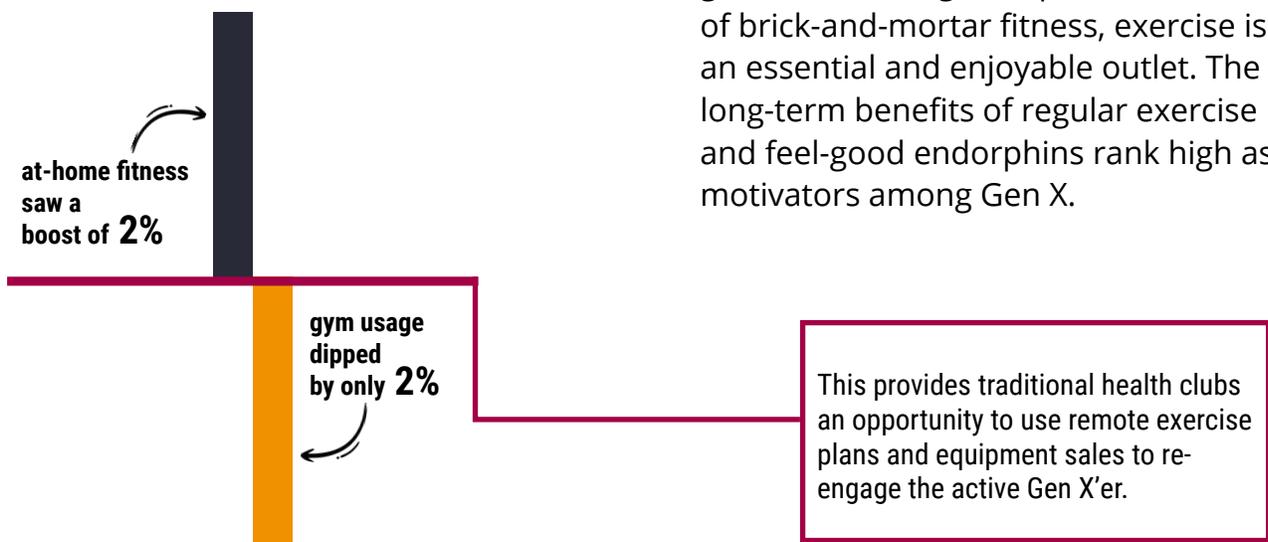
However, they were more likely to trade down than their younger counterparts.



A little over a decade removed from the Great Recession, Generation X is no stranger to the financial uncertainty associated with economic downturns, a by-product of the pandemic.

Balancing potential layoffs and pay reductions against home responsibilities of childcare and eldercare, Gen X may have had to cut back on fitness spending.

The good news is that for the generation that grew up with the rise of brick-and-mortar fitness, exercise is an essential and enjoyable outlet. The long-term benefits of regular exercise and feel-good endorphins rank high as motivators among Gen X.



THE MOST PRICE-SENSITIVE OF ALL AGE GROUPS, THE ACTIVE BOOMER+ VALUES FITNESS MORE NOW THAN EVER



71% of active consumers between the ages of 56 and 65 reported being active

80% of active consumers over 65 reported being active

Participation in sports (+4%) and free online fitness content (+3%) were the greatest gainers among active Boomers.

Their share of studio usage also grew slightly by 1%.

Boomers were more likely than any other generation to invest less than \$25 per month in exercise expenditures

66% before COVID
75% after COVID



A high-touch group, the Boomer's uptick in sports participation and studio usage highlights the importance of in-person social interactions. Fitness club operators can meet this need by emphasizing the social aspects of the club and providing small group exercise workshops focused on a sports activity or discipline.

Also, Boomers' increased market share of free online fitness over the pandemic indicates a market for digital content. Consider offering freemium flexibility, yoga, and strength training classes targeting the needs of the older consumer, along with educational senior fitness/active aging workshops.

METHODOLOGY

In June 2021, survey participants were recruited for this study using a series of screening questions to qualify a highly targeted profile of “active” consumers.

This study reflects those who are ages 18 and older, and who are currently exercising, working out, or staying active. The study also captured responses from consumers who stated they were not active but had an interest in doing so. If a consumer was not currently active and had no interest, they were disqualified from the study.

The study captured 2,113 qualified consumer responses via an online survey within major U.S. markets and across all U.S. regions. The study was administered by ClubIntel, who collaborated with Dynata (an international research panel firm) for data collection.

DISCLAIMER

The statistical information contained in this report is representative of the individuals responding to this survey. All reasonable efforts were taken by ClubIntel to assure data comparability within the scope and limitations of the reporting process.

However, the data contained in this report is not necessarily based on third-party audited data. The statistical validity of any given number varies depending upon sample sizes and the amount of consistency among responses for any data point. The data in this survey is representative of the sentiments reported by the targeted respondents.

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ABOUT ABC FITNESS SOLUTIONS

ABC Fitness Solutions (abcfitness.com) is the premier provider of software and related services for the health and fitness industry. Building on a reputation for excellence in support for clubs and their members, ABC is the trusted provider to boost performance and create a Total Fitness Experience for members of clubs of all sizes, whether a national franchise, regional chain or a local gym. Founded in 1981, ABC helps nearly 16,000 clubs and facilities globally perform better and more profitably, offering a comprehensive SaaS club management solution that enables club operators to achieve optimal performance.

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ABOUT THE IHRSA FOUNDATION

The IHRSA Foundation was established in 2012 as a 501(c)(3) charitable organization with a goal to promote health through exercise. Its purpose is to support the charitable and educational functions of IHRSA, The Global Health & Fitness Association. **Learn more at** ihrsafoundation.org.

The IHRSA Foundation focuses on four key areas:

- Programs: Promote programs that support health through exercise.
- Research: A focus on outcomes-based research to support physical activity and engaging programming.
- Education: Provide education and resources to support health promotion and wellness.
- Engagement: Encourage involvement with the IHRSA Foundation and our mission.

ABOUT CLUBINTEL

At ClubIntel, we deploy traditional marketing research methods to uncover not only what your clients and members want, but also to understand why they want it. In unlocking your clients' motivations, we can provide the uncommon insights that drive differentiated marketing communications, sales processes, and operational programming. The most successful, most profitable clubs understand their customer and turn that knowledge into a personal connection. Our data makes that happen.

For additional details, visit us at www.club-intel.com

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