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GYM LIFE
SOCIAL, TREND & PRIMARY RESEARCH 22/23

Understanding consumer attitudes towards fitness and the gym in a post-COVID world

GYM LIFE IN THE DIGITAL ERA

In a post-COVID world, entire industries have transformed their business models' to survive turbulence

Now we see that digital is used for more than communication but as a tool to embellish services, innovate products, and enhance the customer experience.

In this report, we dive into how consumer attitudes are changing, how brands can thrive in this space, and what consumers are truly demanding as prerequisites for brand loyalty.

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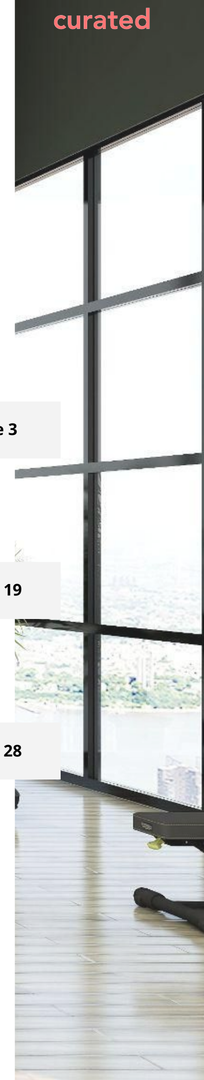

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THE WAY PEOPLE WORKOUT

UNDERSTANDING GYM GOERS

Key motivations and desires

Health as a primary life goal in the wake of COVID-19

Much has changed in the wake of the pandemic but it appears the increased uptake in exercise we experienced at the beginning of lockdown is here to stay; More than 50%[1] of consumers state they will be keeping or increasing their exercise level in relation to their COVID-19 exercise levels. Consumers also listed exercise within their top 3 most important lifestyle activities.

Main motivators

Amongst those we surveyed, mental health ranked as the number 1 consumer motivation to continue working out. This was followed by weight loss/ management and self confidence in 2nd and 3rd place respectively.

Gym Expectations

When it came to gyms, consumers cited a friendly and welcoming environment as their guiding factor in picking and sticking with a fitness facility. A clean and hygienic facility and a wider variety of class offerings came in close 2nd and 3rd.

"Mental health"

Ranked as the no. 1 consumer motivation to workout

"Friendly and welcoming"

Averaged as the most important factor when choosing a gym

"Traditional Classes"

Most common activity for gym visits among consumers

Sources: 1. Outlook for fitness 2022: Reasons for optimism, PWC | Primary research, Curated Digital

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BROADENING EXERCISE CHANNELS

Trialling new ways to work out

Locations/channels for exercise have expanded as customers have tried out various forms of exercising during COVID-19. Fewer consumers are using gyms as their only place of exercise. In particular, exercising outdoors proved to be the stickiest new behaviour with 8%[1] more consumers engaging in it than before the pandemic. Although it's worth noting that 74%[1] have returned to or are happy to return back to gyms.

Home equipment boom

While gyms lost an estimated £3.1 billion during the pandemic [2], home gym equipment purchasing saw substantial growth. Amongst those we surveyed, a treadmill was the most popular purchase for new home gym equipment in the last 2 years since the pandemic began. While free weights and elliptical machines made 2nd and 3rd place.

1. **Treadmills**
2. **Free weights**
3. **Under-desk treadmill**

Most common purchases of gym equipment amongst **25-34 yr olds surveyed** [3]

3400

searches for **'under desk treadmill'** monthly in the UK [4]

Sources:
1. Outlook for fitness 2022: Reasons for optimism, PWC | 2. Yahoo News | 3. Primary research, Curated Digital | 4. Ahrefs, October 2022

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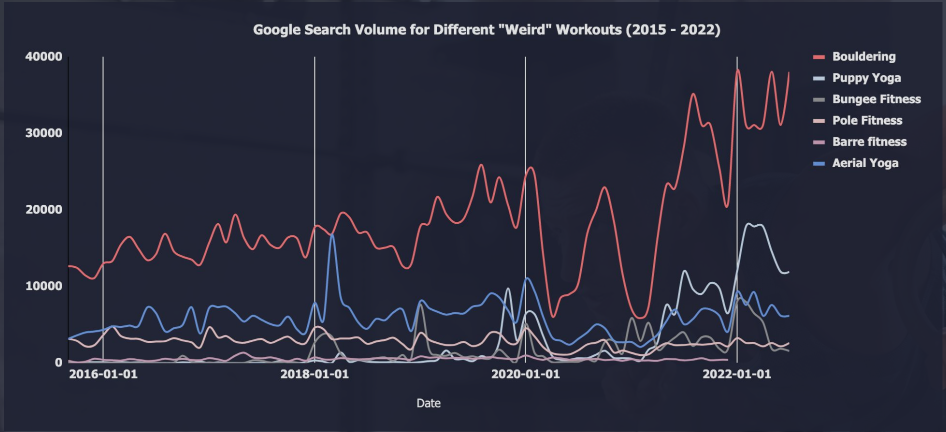
EXERCISE AS FUN:
The rise in weird workouts



Gyms are now working harder to not only retain customers but find new reasons to have them enter the door; According to those we surveyed gym goers still preferred group classes as their favourite way to spend time in the gym. Gyms are capitalizing on this by promoting group classes that give a fun and interesting edge over the most consistently popular (dance, aerobics, hiit).

In recent years, searches for 'puppy yoga', 'barre class' and other unique ways of working out have seen a rapid increase with bouldering being a particular forerunner.

Unique classes get consumers in the door but staple classes make them stay

However, despite the recent boom of weird workouts, when gym goers were surveyed, they still listed traditional workouts as more important to their average gym session than any workout fads. Traditional workout classes came out on top as the most popular activity for a gym visit.

#1

Gym activity is still **traditional gym classes**

+10,000%

Increase in searches for **'puppy yoga'** since 2019

Ahrefs Search Data 2020 - 2022

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THE SOCIAL EFFECT

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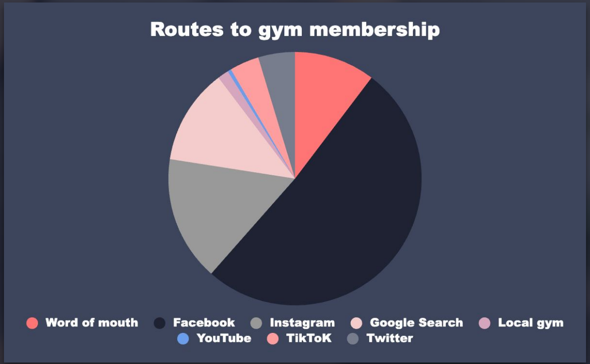
THE SOCIAL EFFECT

A visible shift to digital

Consumers are using the digital space more than ever before to locate brands, find inspiration, and build a like-minded health community.

Data suggests that an audience that once utilised search engine tools for inspiration have shifted towards social channels, using them as search engines for fitness content.

For instance, #proteinpancakes has been viewed 142.1 million times on TikTok compared to 44,000 average Google searches over the last 12 months. In a similar way #proteinshake has 2.1 million tagged posts on Instagram compared to 132,000 Google searches in the UK.



6.2B
TikTok views for #protein

28.1M
Instagram posts with #protein tagged

48k
Annual Google searches for 'protein'

In fact, 27% of consumers discover new brands and products through social media advertising. 22% more specifically find brands through recommendations or comments on social media.[2]

This applies to the fitness industries too, with over two thirds of consumers surveyed currently a member of a gym they found through a social media platform. More specifically, over 50% found their gym membership through Facebook — followed in second by Google search — demonstrating the value of social channels for the gym industry.[1]

Sources:
1.Data from Curated primary research, audience size 200 persons | 2. GWI social media stats

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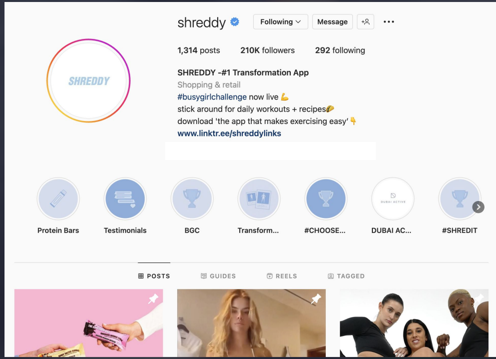
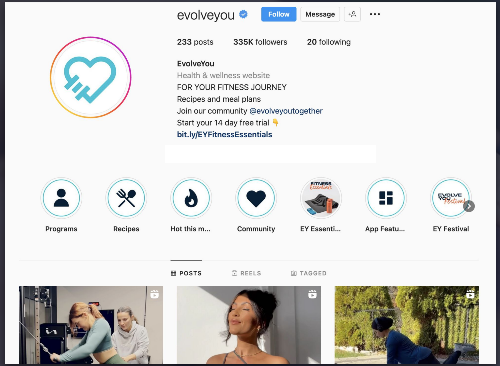
THE SOCIAL EFFECT

Tap into your social community

Social media impacts the consumer's attitudes towards health and exercise too, according to 63% of those surveyed. However, not always as we assume, with 50% believing this impact to be positive rather than negative.

Fitness influencers are undeniably a significant factor in this, with 47% of those surveyed following at least 1 (to 5) fitness social accounts.[1] Fully fledged businesses are growing from the seeds of this social community. For example, Evolve You and Shreddy, each of which amass over a quarter of a million followers on Instagram alone.





84%

Of TikTok users have a better perception of sports and fitness brands, professionals and teams that are on TikTok[2].

How can brands compete?

In addition to tapping into the existing online fitness audiences, brands would benefit from building their own social community to enable positive interaction with consumers on an authentic level.

Data shows that above all, social media users have a better perception of those who are visible and accessible in the public domain. So, get talking!

Sources :
1.Data from Curated primary research, audience size 200 persons | 2. Marketing Science, EU, Sports Vertical Research conducted by InSites Consulting, December 2021 (n=4,001, study conducted among TikTok users with an interest in sports or fitness), https://www.tiktok.com/business/en-GB/insights

THE SOCIAL EFFECT

Inspire and educate

78k

Google searches for **Gym workout plan** over the last 12 months[1]

1.7B

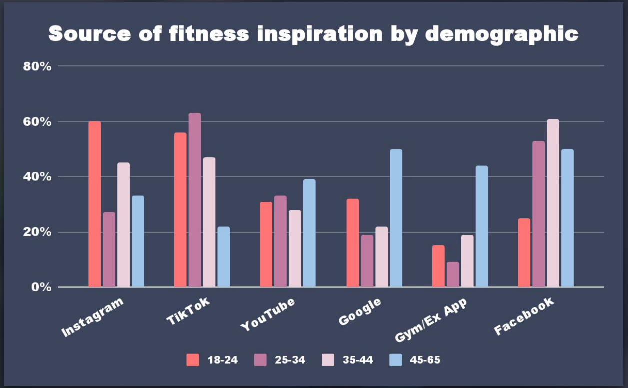
TikTok views for hashtag **#gymgirls**, and 869.4m for **#gymworkout**

46.6m

Instagram posts with the hashtag **#gymmotivation**

Social is used for more than brand discovery, but also as an educational tool to gain a wider understanding of fitness and personal health or for practical gym guidance.

Of those surveyed, 40% said they used Facebook, Twitter or TikTok as a tool to find fitness content like inspiration, advice or workout plans whilst 25-30% used Instagram and YouTube too.[2] Meanwhile 'tiktok' has become commonplace in Google searches with users going via search engines with the intention of sourcing TikTok content. For example, 500 people search 'tiktok treadmill workout' monthly in the UK.[1]



While gym terms are responsible for the highest organic traffic on social media platforms, data from TikTok indicates that the social fitness community are open to a diverse range of activities from the trending #gluteswork out (4.8B TikTok views) to more unconventional exercises like the #hoolahoopworkout (3.8M views)

Sources:
1.Ahrefs November 2022 | 2. Data from Curated primary research, audience size 200 persons

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SURVIVING SOCIAL CHANGE

HYGIENE IN GYMS

Conscious of the new 'normal'

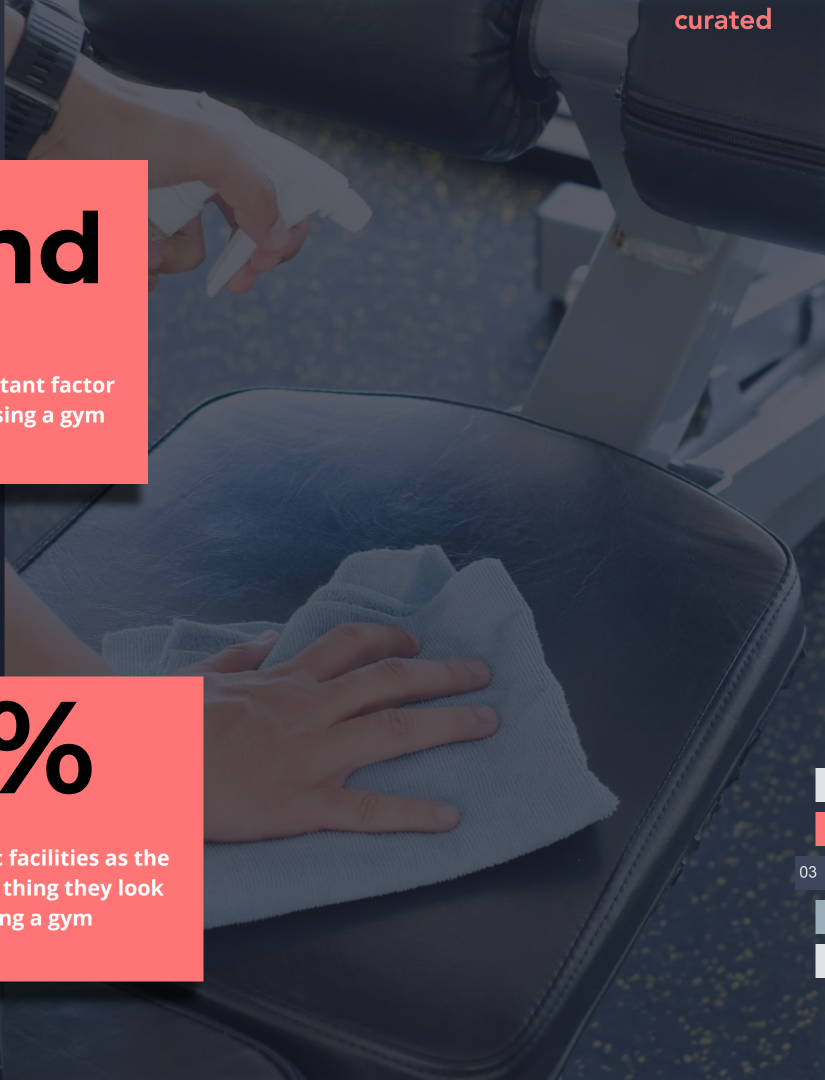
The pandemic has greatly impacted gym preferences, with **67% of people in the UK saying they are more afraid of germs and conscious of hygiene now, than before COVID**.

In response to this, most gyms have implemented reductions in class numbers and encourage regular sanitising of equipment.

Of those we surveyed, **16% ranked hygiene as their most important factor when deciding whether to pick a gym**. This was second only to a friendly and welcoming environment.

In the focus group we conducted, this finding was also present, as hygiene is now more than ever an important factor for those that regularly attend the gym.

"Hygiene is a huge factor for me as it's part of my gym routine. I like to go to the gym and shower there before leaving. I like to feel clean."



2nd

Most important factor when choosing a gym

16%

Ranked hygienic facilities as the most important thing they look for when choosing a gym

THE COST-OF-LIVING CRISIS

Prioritising and striping back

The cost-of-living has continued to rise at its fastest rate in over 40 years, and is expected to continue to increase in the coming months. Showing little signs of slowing, the impact on the fitness industry is huge. The cost of fitness is becoming unattainable, as gym memberships are now considered a luxury to some.

From our focus group, it is evident that the cost of living crisis is changing some attitudes towards fitness and gym memberships, as people prioritise spending elsewhere.

When asked for gym motivations in order of importance, our survey results concluded that although physique toning was ranked #1, close second was mental health. Many use the experience of going to the gym for their mental health, suggesting it's still a critical factor and paying for a gym membership in order to look after mental health is prioritised by some, despite the cost of living crisis.

'I've just cancelled my gym membership. I'm not willing to pay £35 a month to go to the gym and do the same routine, the same cardio, use the same few machines and then go home. When I could do 90% of these exercises at home with a couple of free weights, it's not worth it'.

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THE GYM ATTENDING DEMOGRAPHIC

The rise of the gym goers

Young professionals

The largest number of respondents in our survey were aged between 25-34. Of this demographic, 55% said they mostly work out at the gym as opposed to at home workouts, gym classes, etc.

Of those between the ages of 35-44, 44% said they mostly worked out at the gym, with just 7% working out at home.

Active ageing

In 2020, the number of gym goers aged 60+ passed one billion (1 in 7 people). This figure is set to increase rapidly by 2045, with 1 in 5 people expected to regularly attend the gym. [(1)]

During the pandemic, home workouts increased in popularity as gym closures left gym-goers with no other option. Post-pandemic, many adopted this lifestyle, with 14.1% of respondents claiming to do most workouts at home. This ranked above those that chose health clubs as their most common location to work out.

COVID changed attitudes towards gym — "I haven't been to a class since pre-COVID. Only because they change them so much that you was only allowed a certain amount of people in the room so you can never get a slot or it just wasn't the same. And then I just fell out of like booking and going to classes because I could never get in."

8 in 10 Brits admitted to experiencing 'gym-timidation' post-pandemic. The term used explains feelings of gym anxiety and imposter syndrome.

03

(1) https://www.icaa.cc/blog/2018-07/The-older-population-is-set-to-transform-the-fitness-industry.htm

ACCESSIBILITY AND INCLUSIVITY

A space for all

Disability access

The latest estimates from the Family Resources Survey suggest that 14.6 million people in the UK have a disability. This emphasises the need for accessibility and inclusivity not just in gyms, but in other areas of fitness too.

In recent years, numerous steps have been taken to increase disability access in gyms. For instance, through apps. The '**accessercise' fitness app** features a variety of exercises suited to certain impairments and allows users to rate training facilities based on accessibility, so they can help others to find inclusive studios and gyms.

Some features of the app include:

- A directory of gyms and fitness facilities, ranked by users for accessibility
- Social hub, connect with like-minded people
- Ability to learn new exercises for your impairment(s)

14.6

million people in the UK have a disability

Social and cultural inclusivity

Larcom states that an inclusive fitness industry is one in which 'the majority of fitness facilities actively welcome and include people of all abilities'[1]

There has been a rise in female only gyms, in response to gym harassment and objectification. Many women have been trying out single sex gyms and they are set to rise in popularity, alongside mono-religious gyms.

Activewear has taken a more inclusive approach, designing athleisure pieces for people of different shapes and sizes. A prime example of this is Nike —in 2019, Nike revamped its flagship store in London with plus size mannequins to showcase their plus size items of clothing.

(1) https://www.ihrsa.org/improve-your-club/why-making-your-gym-more-inclusive-is-good-for-business/

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MOVING FROM THE MAINSTREAM

BOUTIQUE GYMS

Premium, cheap, anything but the middle

Following in the footsteps of supermarkets and shops, the bifurcation of premium and low-cost options continues to grow in the gym space. A wider percentage of consumers are looking for either premium or cheap options with very little desiring gyms in the middle price point range.

The global boutique fitness market was valued at $49.3 billion in 2021[1] and is projected to grow as today's millennials' opt for feel, community, and ambience above pricing in their gym selections.

Boutique Fitness Classifications

Barry's, Soul Cycle is the quintessential **'Specialised boutique'**. These types of boutique gyms are characterised by a classes only offering which are completely unique to their gym brand.

Meanwhile the quintessential **'All encompassing health club'** is defined by groups such as EQUINOX. These boutique gyms are offering a wider range of services; personalized classes and wellness services such as pools, saunas, recovery workouts and treatments.

59%

said they would spend **over £50** on a boutique gym

How can fitness centres create a boutique gym experience?

Boutique gyms can appeal to the 'no timer and 'unconventional exerciser' persona's in four main ways:

Provide Uniqueness - provide a specialist activity that is difficult to replicate elsewhere.

Promote Tribalism - encourage customers to form networks (or tribes) with extended social events. Satiating the 'no timers' social and fitness needs in one combined time saving activity

Offer Flexibility - remove the burden of a recurring cost by offering premium pay as you go prices.

Stay Local & Urban - offering local, supporting products and services in urban centres can cultivate a sense of authenticity for customers.

1. Global Boutique Fitness Studio Market Report (2022) - Azoth Analytics

TRICKS OF THE MIND

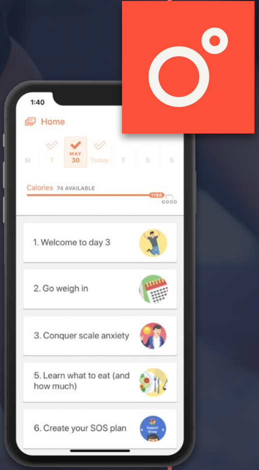
Taking fitness enterprises into the psychological

"It's not ***what*** you eat, but ***why***"

1.3k

Monthly UK searches for **"why can't I stop eating"**

In the wake of COVID-19 and a mental health revolution, people are now more aware and more curious about the effect of psychology on diet and fitness than ever before. Diet apps Noom and Second nature have made this their guiding proposition by offering research backed psychology to help their patrons understand and tackle their bad habits.



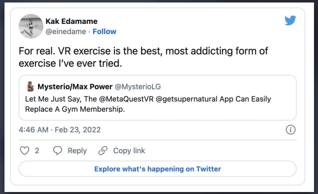
Fitness Gamification

2.6k

average monthly global searches for 'fitness game'

Fitness gamification is all about making fitness more fun by hacking the same psychological reward systems that incentivise us to keep doom scrolling or playing slot machines; By offering a game-like reward, exercise becomes more appealing to fitness lovers and haters alike, offering a great potential for gyms to attract wider commercial audiences.

What started off as small game like features implanted in fitness tech (leaderboards and collectable rewards for hitting PB's) has now grown into a small fitness empire; Peloton's new lanebreak feature allows users to ride using an ultra futuristic game-like interface, collecting points and ranking against users with them. In a similar fashion, smaller start up's like Quell and playfitt have had major success offering game-like elements to fitness workouts - raising a collective $6 million in their initial seed rounds.



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THE GYM PERSONAS

The gym industry is evolving, and with this - audiences are changing too. Different people have individual motivations, goals and needs when it comes to fitness.

THE INFLUENCER 'GYM GAL'

Persona Values: Style first | Inspiration seekers | Gym as a mindset

Who are they?
The 50% 25-34 year olds who feel social media has impacted their relationship with health & fitness. Particularly the 77% of those who felt the impact has been positive.

What do they do?
They will always be keen to highlight their activities on social media, whether it be the gyms they go to, the activewear they are buying, or the apps/tech that they enjoy using.

What do they need?
Aesthetics and style are key to this persona. They will visit and share gyms that match their ideal style (gym/activewear colour palette and trend). They see gyms as a place to feel at home and a 'space' to really enjoy, not just a location to exercise then leave. The gym has its place in their routine and has the potential to be closely intertwined with their personality, thus, it must provide the adequate facilities to reflect this.

50%
Of 25-34 year olds who feel social media has impacted their relationship with health & fitness

77%
Of those felt the impact has been positive

"A nice space…"
Individuals in this persona group described a key factor in their choice of gym is whether it provides "A nice space" or not.

THE INFLUENCER 'GYM GAL'

Persona Values: Style first | Inspiration seekers | Gym as a mindset

D 🕷
@justblowmex

I spend way too much money on gym clothes and gym accessories 💀 but hey at least it keeps me going

Nikki
@TheNikkiRosa

I love my gym. I never get bothered. Paying a little more is worth it

Victoria Brown
@ladybosshr

Going to the gym each morning is part of my daily routine 💪 I find it helps set me up for the entire day. I feel so energised after going and ready to take on the day's tasks.

#gymlife

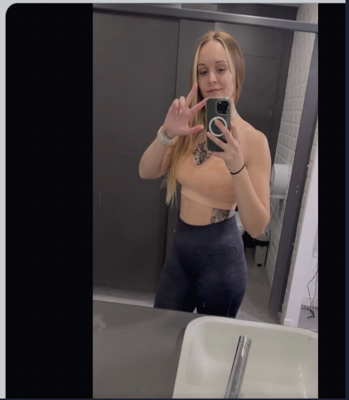
Kristi Riley
@KrileyXO

I am so thankful for the gym rn. Honestly don't know what I'd do without it 🥹

Justin Y.
@JustinRYap

I totally just signed up for the more pricier gym. I think it's worth it. To think of it, I'm paying for time and amenities. If I can't get my workout in for a cheaper gym because of the crowd and lack of maintenance on the equipment, then they don't deserve my hard earned money.

Life of Hers 🌻 @lifeof_hers · 1 Oct
Gym is my home ❤️ #gymgirl #fitnessgirl #lovegym



THE UNCONVENTIONAL EXERCISERS

Persona Values: Experience driven | Fearless of the unknown | The gym as a place to discover

Who are they?
The ⅓ of 25-34 year olds who prefer unconventional gym classes

What do they do?
The weird & wonderful. These can be spins on traditional exercise classes (such as Puppy yoga) or a completely new exercise in its own right (such as trampolining)

What do they need?
To be enticed with fitness opportunities that are far from the standard, exciting marketing strategies can increase awareness of these previously unknown classes and educate viewers on how they work.

1 out of 3

Of 25-34 year olds prefer unconventional gym classes

"I need to know what to expect"

This persona group said they are keen to try these innovative exercises, as long as they are made aware of the benefits ande educated on what to expect

"Classes, for me, are number one"

Many of the 25-34 demographic value classes the most- why not differentiate the offering?

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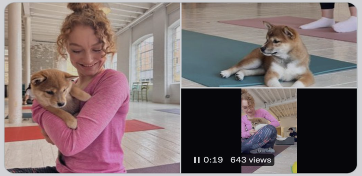
THE UNCONVENTIONAL EXERCISERS

Persona Values: Experience driven | Fearless of the unknown | The gym as a place to discover

Laura J Hyatt @LauraJHyatt · Nov 14
I mean it's so London, but I did **puppy yoga** yesterday! And not just any **puppies**, but Shiba Inu's!

Yes that's right, a **yoga** class, with **puppies** running around! 🐕 🧘



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Sherri Shepherd @sherrieshepherd · Apr 7, 2021
The last six months I've been laser-focused on my health, which in part has helped me with my weight loss.

Now with my increased energy & a desire to stay active, I'm taking roller skating **classes** to get better on my wheels. 🛼

#RollerSkating #Exercise

186 52 2,129

Thiqueee 🇿🇦✨ @_robinsparkle · Nov 8
Sweaty Betty. I love hot yoga 🧘 🔥

Mindy Hansen @MindyHa75917077 · Nov 9
2022.10.27 **aerial silks** 9 #愛麗猴 #愛麗絲上綢吊 **#aerialsilks** #aerialsilkspractice #直綢練習

Stacey 🌻 @What_Stace_Said · 4h
1 whole year as a Zero Gravity Girl, loved every minute of it and everybody I've met along the way ❤️ #ZeroGravity **#PoleFitness** #PoleDance

1

THE NO-TIMERS

Persona Values: Convenience first | Social trainers | The gym as an escape

Who are they?
Often have families, balancing a busy work schedule and lacking the time needed to exercise- what sort of offerings will enable these individuals to prioritise exercise?

What do they do?
The odd, unstructured workout here and there wherever and whenever the rare occasions they have time come about.

What do they need?
These individuals need to feel motivated to exercise through 'social training' with friends/colleagues. It will help to hold them accountable for their exercise progress.

They may also need gyms to be welcoming and comfortable, enabling them to approach the environment with confidence, despite rarely visiting.

"I do when I just do what I can, like if it fits of my schedule"

Individuals from this persona group suggests that exercising must fit around a tight schedule.

"I felt alienated"

Individuals in this persona group can feel alienated by certain gym and exercise environments.

"Having people to push you when you really don't feel that you want to go. I didn't have that. So then I start making excuse to not go"

This persona group needs that social aspect to their exercise life in order to feel motivated.

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THE NO-TIMERS

Persona Values: Convenience first | Social trainers | The gym as an escape

rannn .
@HeNeedsMe_

Having a gym buddy makes working out less intimidating.

JIMENEZ🇲🇽
@drealiciouss

I HATE when work gets in the way of my gym life

JG
@DearJazzy

I took this workout class with my co-workers last night and it was so good! My body feels so good and sore. I'm excited for next week.

♉
@colleenmaaay

Only reason why I'm not consistent with the gym is bc of work I don't wanna go after work sometimes 😩😩😩😩

haydas 💶 @sadyahcw · 24 Oct

i **need** a consistent **gym partner** cause i **lack** the **motivation** to go myself 😂😂😂

THE ACTIVEWEAR CONNOISSEUR

Persona Values: Apparel first | Brand loyal | Confidence through the gym

Who are they?

This group see the clothes that they wear to exercise in as one of the most important aspects to their health & fitness activities. Activewear is a source of confidence, motivation and aspiration, often enabled by social media. This group is majority female with some male members, most often in that 18-34 age bracket.

What do they do?

Follow activewear brands, participate in giveaways and stay engaged. They also talk about their favourite brands/items in the social media space.

What do they need?

These individuals need to see fitness influencers wearing the brands they find aspirational, as over 52% of this persona group follow at least 1-5 fitness influencers on social media.

"The way my gym wear looks on me plays a big role in how confident I feel in the gym"

A female, aged 25-34 from this persona group suggests that their activewear impacts their confidence in the gym.

"If I am running, I want it to be less like restrictive, in the gym, style matters more"

Where they exercise impacts the activewear they choose.

"Seeing an influencer I follow and care about will always impact how I perceive a brand or particular piece of activewear"

This persona group needs that social aspect to their exercise life in order to feel motivated.

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THE ACTIVEWEAR CONNOISSEUR

Persona Values: Apparel first | Brand loyal | Confidence through the gym

river 🍂 @rivermanifests · Nov 13
entering my balanced diet, **lululemon**, pilates and yoga, dance conditioning, matcha tea, skincare 101, almond shaped acrylics, student of the year era
2 22 100

nor @femmcals · Nov 11
need that **lululemon** jacket just to look good
2

aria @caffeineinks · Nov 13
i bought a new **activewear** set for gym and it somehow motivates me and makes me even more confident
1

Lina Spencer, M.Ed. @LinaaSpencer · Nov 8
Told myself I didn't need the **Lululemon align** bodysuit and somehow I ended up getting it in 3 different colors...
1 1

Nathalie 🎀 @HausOfSpears · Nov 14
Obsessed with the pink peony colour from **lululemon** 💕

1

brithney @brithneyasf · Nov 14
lululemon align tanks 🤝 me

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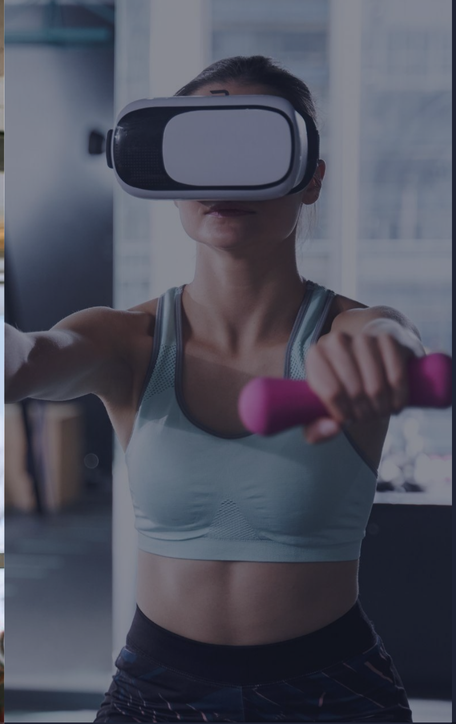
David Angus
Chief Strategy Officer- Curated Digital

"Long gone are the days that you can neatly put gym goers into neat boxes. Cardio Kate, Weights Will, Yogi Yasmin are now in the ether forever more. The pandemic has accelerated the pace of change and the interconnectivity of health and wellness, which has been exacerbated within the context of the gym. This opens a new theme of the Hybrid trainer or all rounder. Someone who is seeking balance across a number of wellness disciplines to pursue their best (and balanced) life. People are no longer happy to groove along in their stereotype and are pursuing experimentation in types of training, equipment and location.

Thankfully the pandemic wasn't terminal for the gym but the return has not conformed to type, with people weaponizing the gym alongside a more balanced training and wellness plan.This opens up huge opportunity, but competitive risk. The opportunity consists of the ability to find consumers across multiple channels and through varied tactics and techniques. The risk? Threats from potential diminished share of wallet as consumers look for variation in providers. This also makes advocacy and retention a key concern of any gym or fitness organisation."

What about the recession?

"As we saw during the pandemic, people were resilient and found ways to stay fit and healthy with record sales and the emergence of the home gym. Nothing is recession proof, but in my opinion wellness is one of the areas consumers we attribute a reasonable amount of spend to, as long as brands can meet the customer where they want to be met through resonant, relevant and engaging products, services and communication."



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Anoushka Rabin
Georgia Robin
Piper Jacobsen
Esha Mander

Gym Life Report 22/23

Sources of Truth:

Primary Research (Qual + Quant), conducted Between September and November 2022.

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METHODOLOGY: PRIMARY RESEARCH

Survey

Surveys were conducted online using survey tool 'Typeform' with a total sample size of 300. The questions were pre-written, it included 17 questions with some skip logic functionality. Quantitative data supported the formulation of the focus groups.

Focus group

A focus group was used to collect data from a small group (10) subject matter experts in the topic of gym life/gym wear . Discussion was initiated between the group members to discover their thoughts on the topic. This method was utilised to gain insight into niche markets and learn about customer sentiment. The structure of the focus group was informed by the results of our survey. The main aims of the focus group centred around the collection of relevant qualitative data in an environment where participants were willing and able to share their thoughts.