



Group exercise participation: National Survey

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1. Management Summary

2. Key findings

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3. A focus on 14 and 15 year olds

Management summary



Management summary

General participation in sports

- ❖ A majority of 14 and 15 year olds participate in exercise at least once a week, this is likely to be due to compulsory P.E lessons in school
- ❖ The main reasons for participating in exercise are health, fitness and the social aspect.

Group exercise participants

- ❖ School/college are the most popular venues for group exercise classes, with dance being the most popular style
- ❖ Along with Zumba, circuits is also a popular style of group exercise 'ever' tried
- ❖ Two in three 14 and 15 year olds attend group exercise classes with friends while a fifth attend alone
- ❖ Before participating in group exercise classes, three in ten were not doing any exercise, while half were doing other forms of exercise

Latent Demand

- ❖ Amongst 14 and 15 year olds not currently participating in group exercise but are interested in doing so, there is relatively high interest in cardiovascular and strength and body conditioning
- ❖ The main barriers to not participating in group exercise is due to having other interests (24%) and not having anyone to go with (19%); emphasising the social aspect may increase participation levels

Health benefits and Attitude towards group exercise

- ❖ The social aspect along with fitness are the key drivers for participation in group exercise classes
- ❖ 14 year olds tend to view the social aspect as more of a benefit than 15 year olds

Method



Method

The fieldwork was conducted between the 19th February – 7th March 2015 and the survey length was approximately 15 minutes

Several sample groups were conducted:

- 1468 women and men aged 16 years + with a skew towards women (1219/249) and to be weighted back down to be nationally representative
- 398 16 years + who have participated in group exercise in the last month.
- 168 14 and 15 year olds

The following report focuses on:

- 14 and 15 years olds

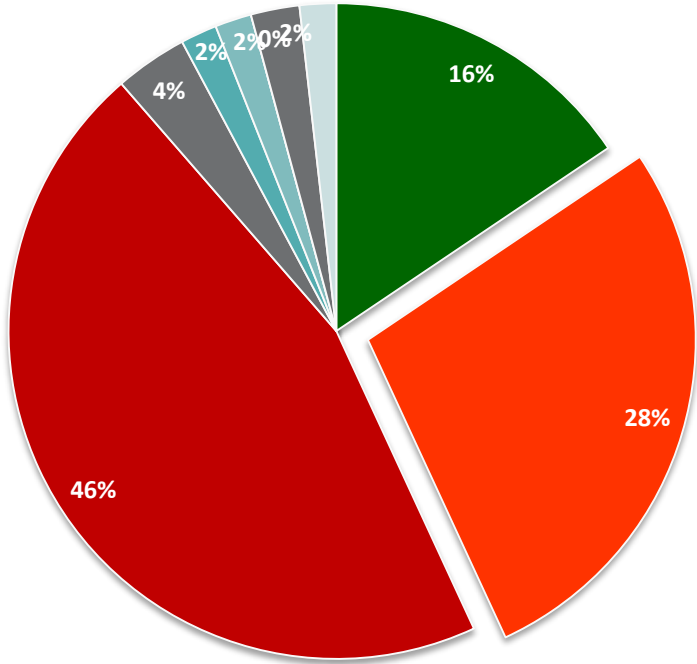


Focus on 14 and 15 year olds

General participation



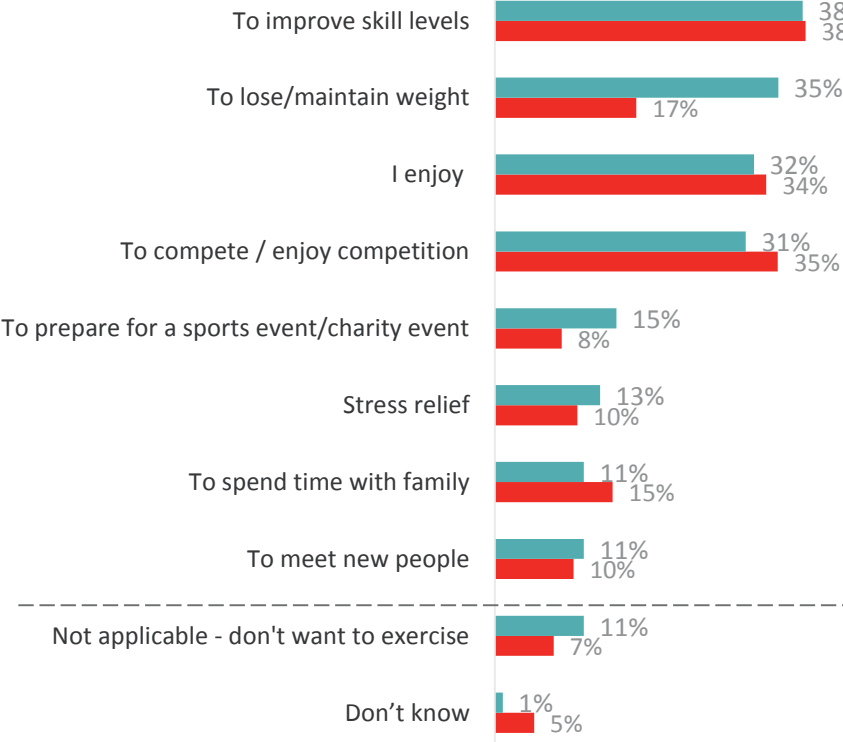
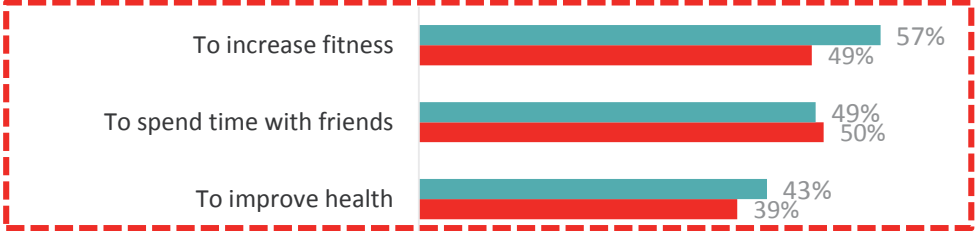
Due to compulsory sports at school, a majority are exercising at least once a week with over 2 in 5 exercising at least three times a week



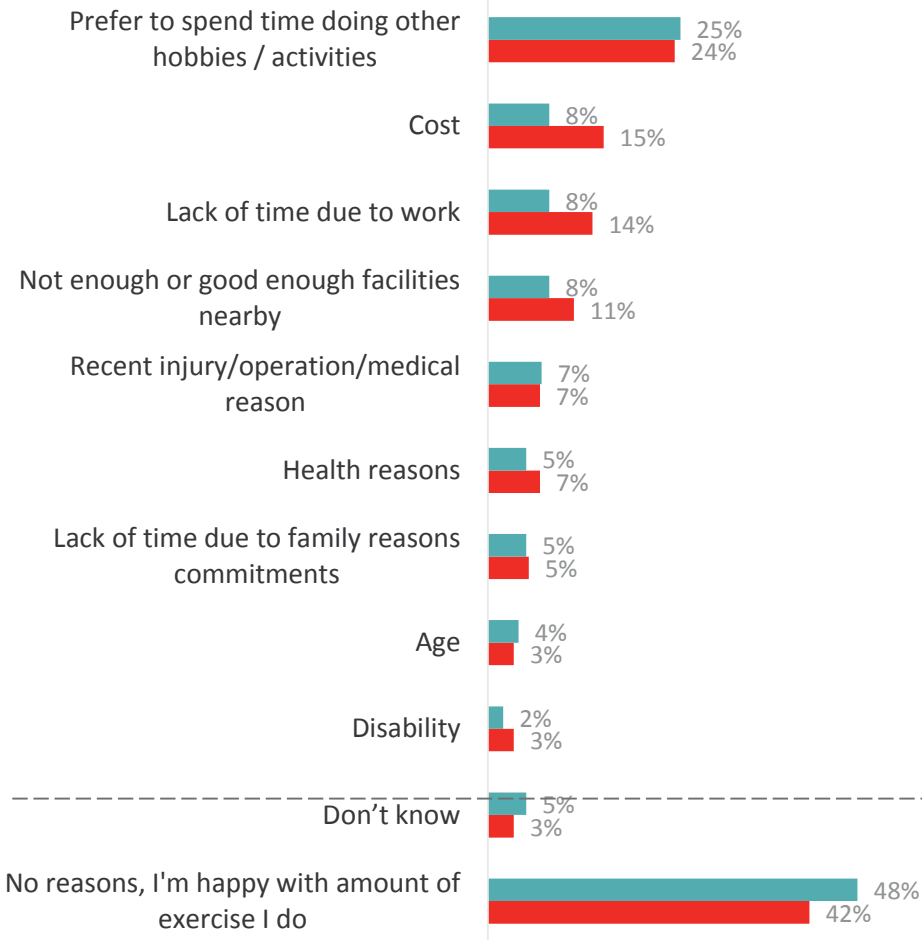
- Five times a week or more
- Three or four times a week
- Once to twice a week
- Two or three times a month
- Once a month
- Once every two or three months
- Once or twice during the year
- Nothing in the last 12 months
- Don't know



Fitness and the sociable aspect of exercising is a key for 14-15 year olds, while the main barrier is preference for other hobbies



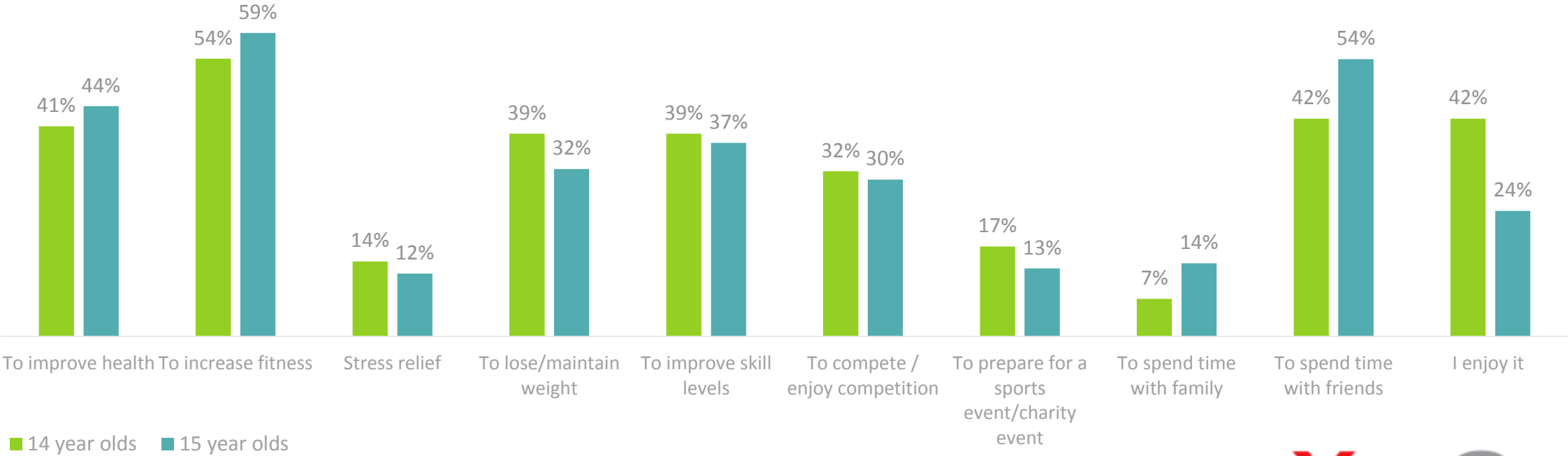
■ Wave 2
■ Wave 1



q7. Which, if any, of the following reasons do you exercise or would like to exercise? Base: All 14-15 year olds: (Wave 1 206, Wave 2 168)

The drivers to exercise are slightly different between 14 and 15 year olds, while fitness remains important to both age groups

14 year olds are significantly more likely to say they enjoy exercise than 15 year olds

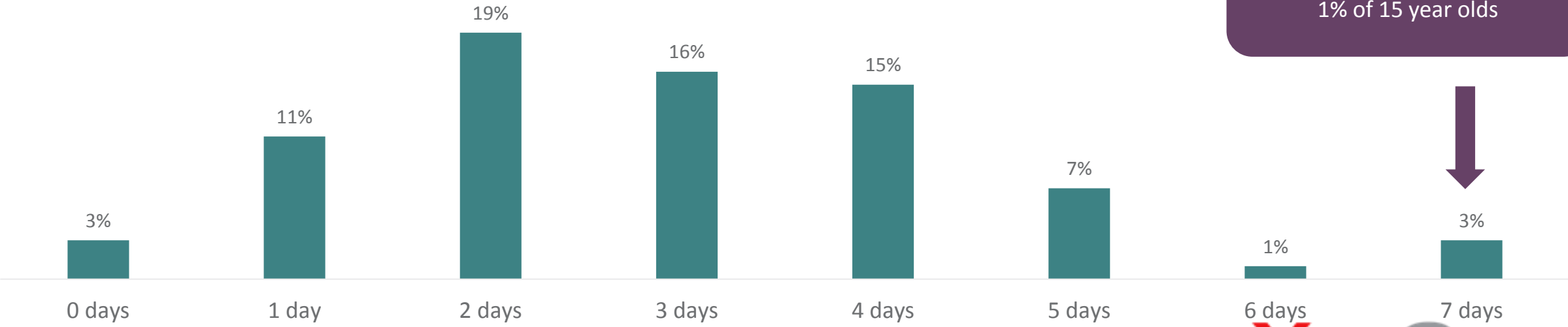


q7. Which, if any, of the following reasons do you exercise or would like to exercise ? Base: 14 year olds: 69 15 year olds: 99

46% have exercised between 1 – 3 days for 30 minutes or more



Number of days exercised in the past week



7% of 14 year olds exercise 7 days a week compared with just 1% of 15 year olds



Headline participation



Dance is the most popular style of group exercise among 14 and 15 year olds (unprompted)

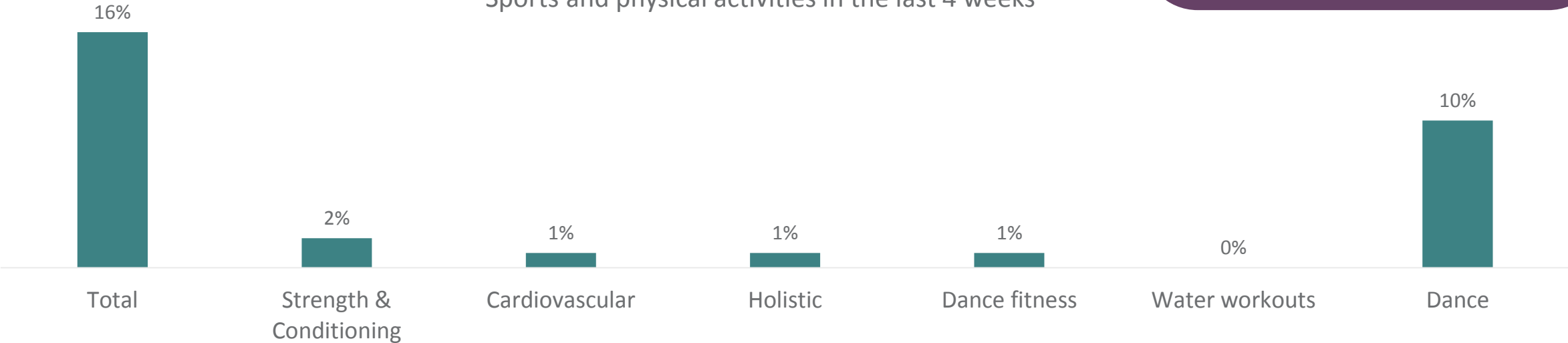
23% of 14 year olds have participated in at least one of the group exercise styles compared with 17% of 15 year olds



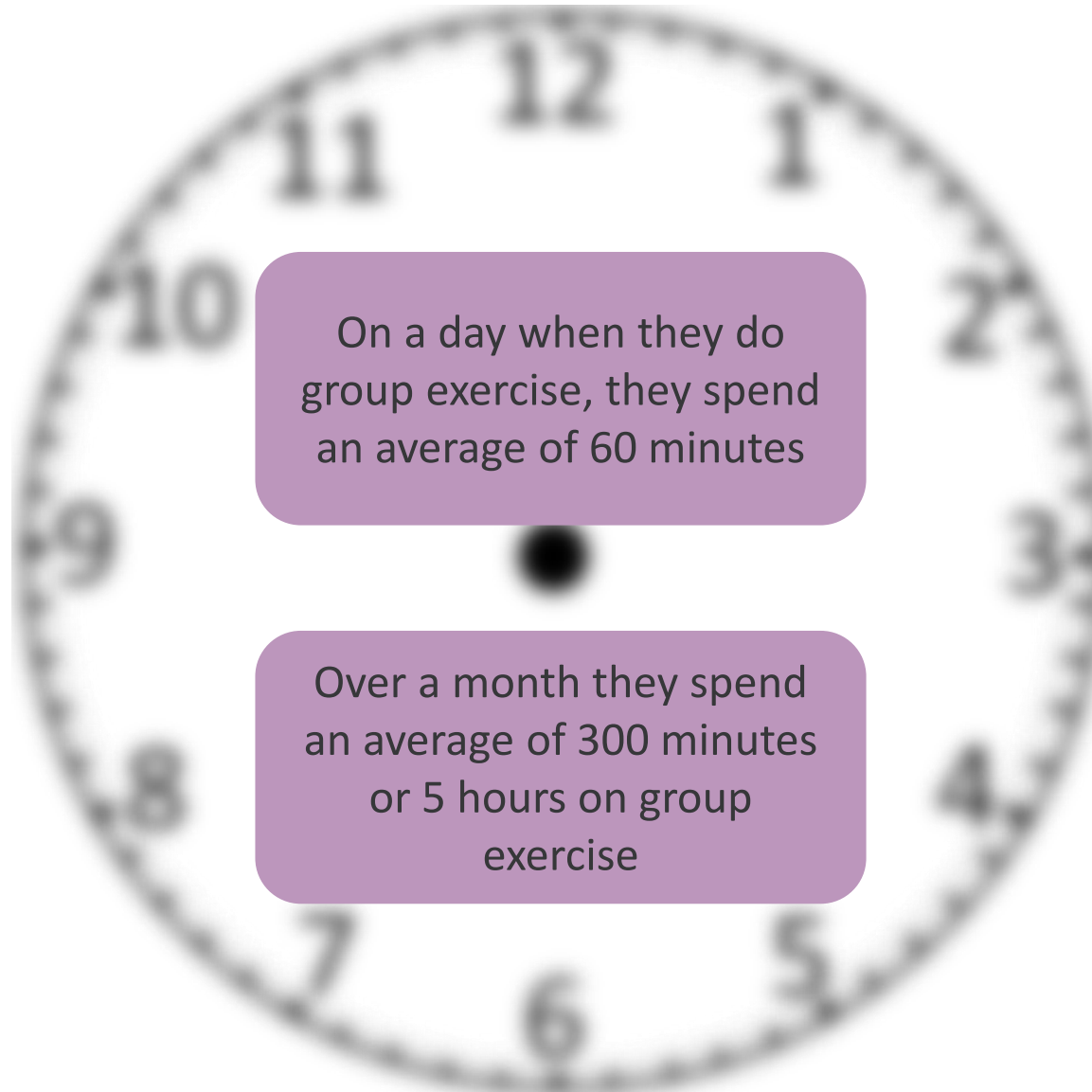
Dance is most popular amongst 14 year olds with nearly a fifth (18%) participating compared with just 8% of 15 year olds.

Nearly a quarter (23%) of those who participate in group exercise monthly dance, compared with a fifth (18%) who have participated at least once in the last 12 months

Sports and physical activities in the last 4 weeks



Average time spent participating in group exercise classes



On a day when they do group exercise, they spend an average of 60 minutes

Over a month they spend an average of 300 minutes or 5 hours on group exercise

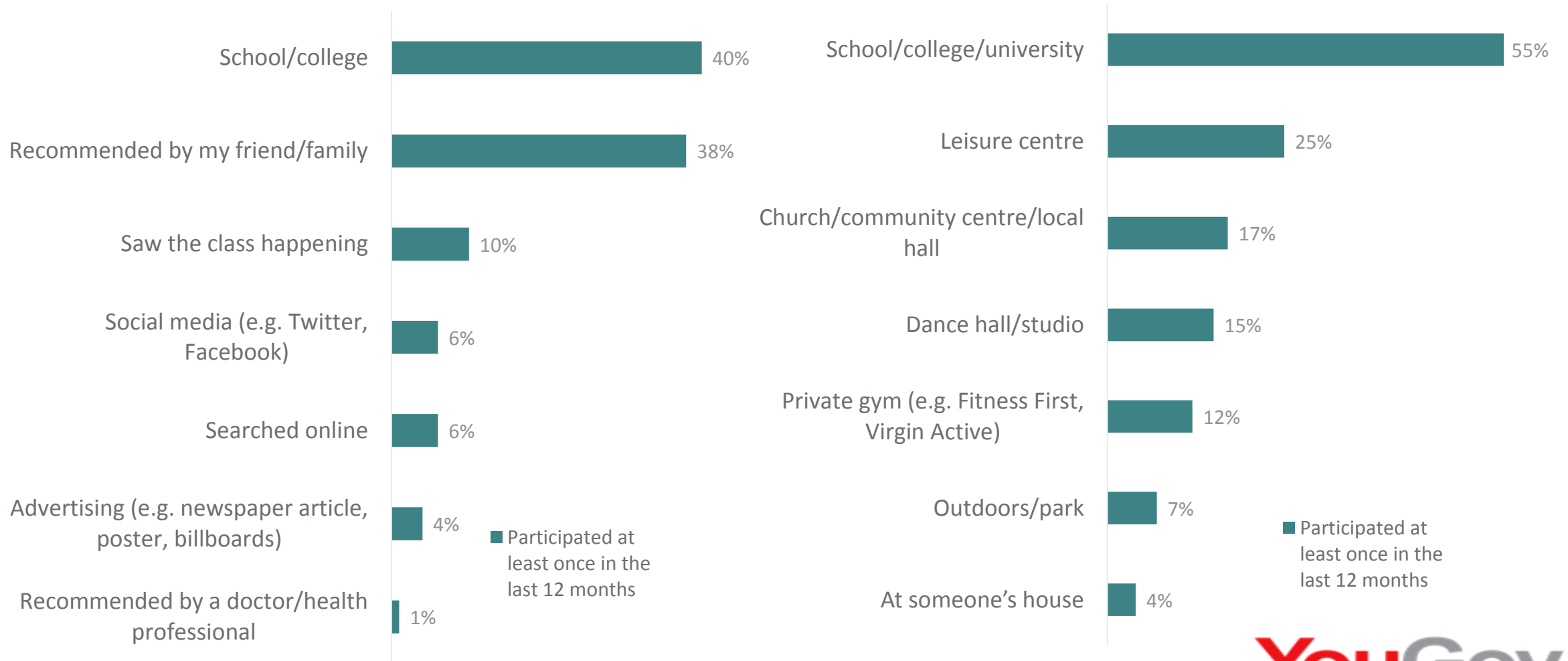


YouGov

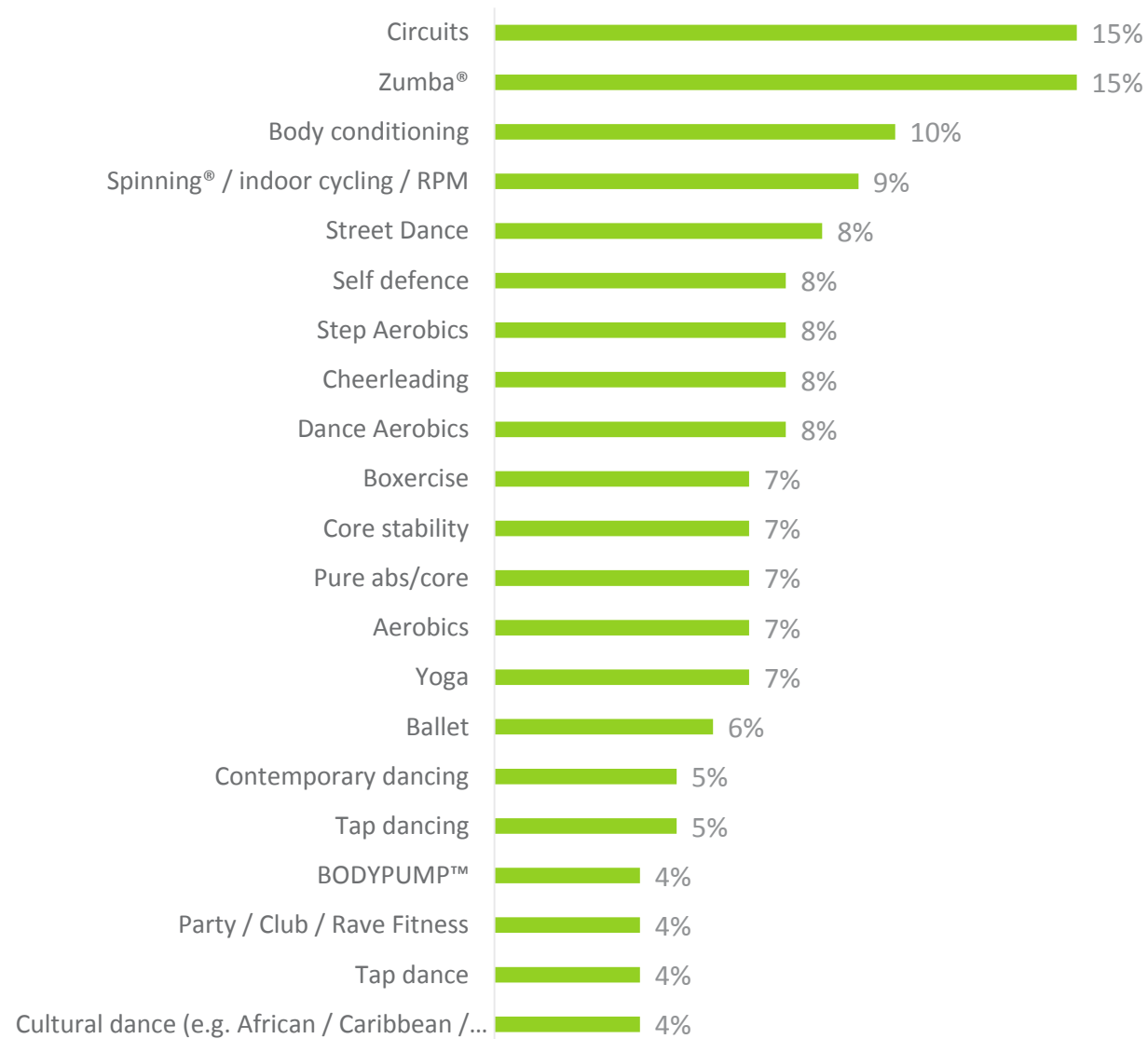
How they take part



School/college is the most typical place for awareness and participation in group exercise classes



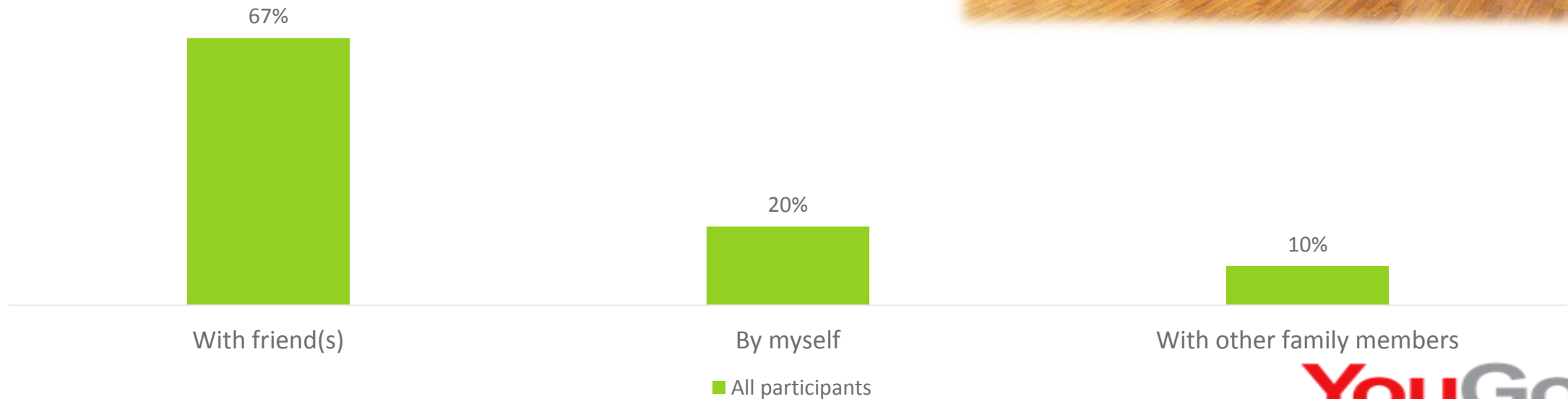
Circuits and Zumba are the two most popular styles of classes attended



YouGov

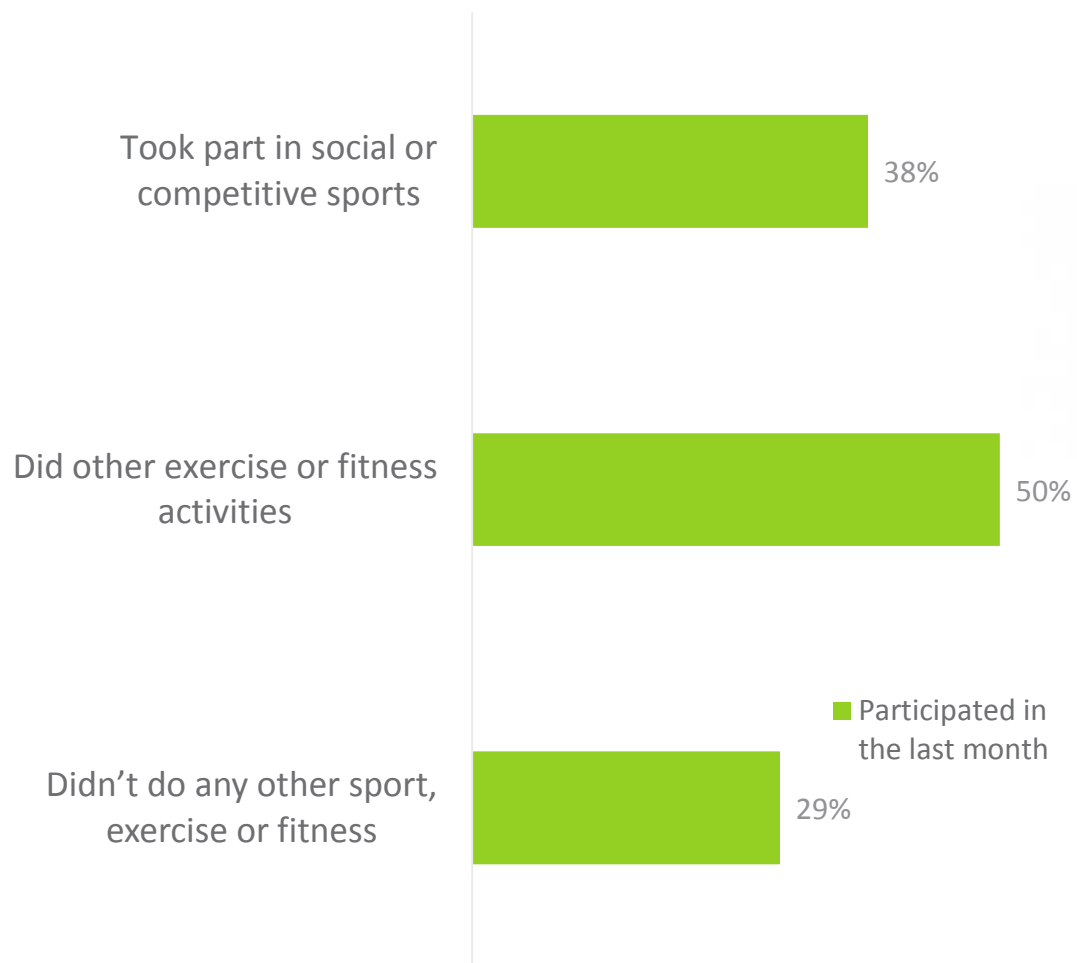
Two thirds attend group exercise classes with friends, while only a fifth attend by themselves

Gavin, I am only showing options that are relevant for this age group, some selected attending with work colleagues and husband/partner



YouGov

Amongst those who monthly attend group exercise classes, 3 in 10 were not doing any exercise before

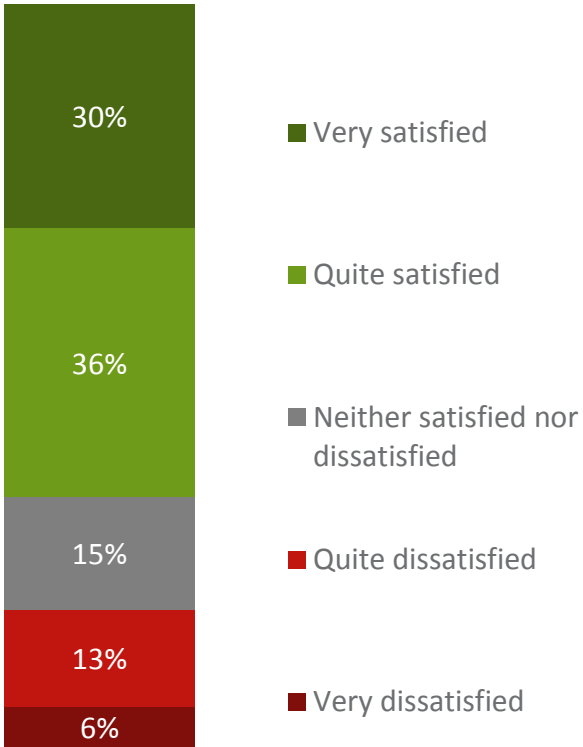


Satisfaction and interest

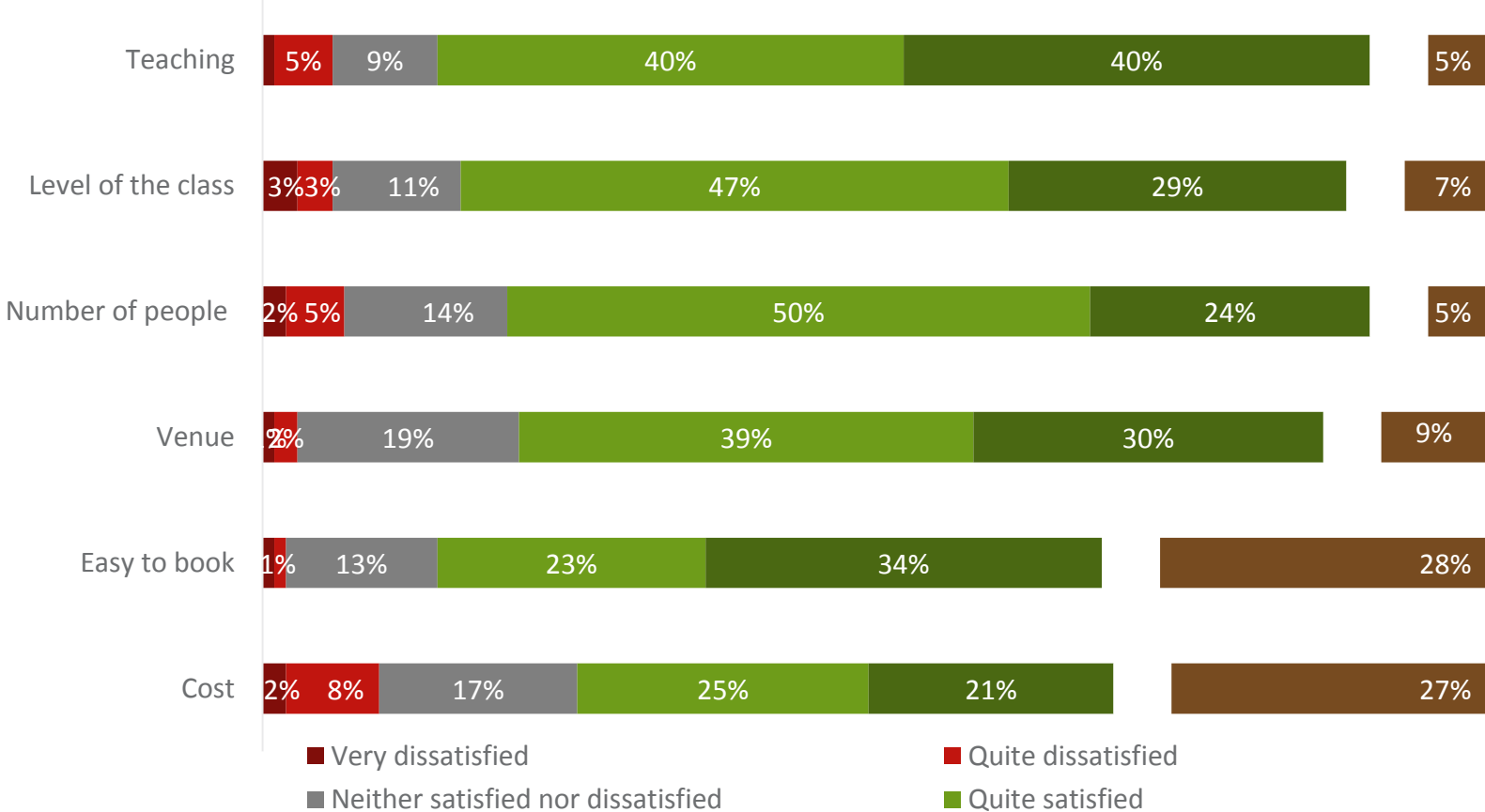


High satisfaction levels on key aspects of group exercise while improvements in satisfaction could be made to cost

Overall satisfaction



Satisfaction with different aspects of group exercise



Q25_1 - q25_6. Thinking about the most recent group exercise class you did how satisfied or dissatisfied were you with the following aspects?
 q28. And overall how satisfied or dissatisfied were you with the most recent group exercise class you took part in? (Base: participated in the last 12 months 100)

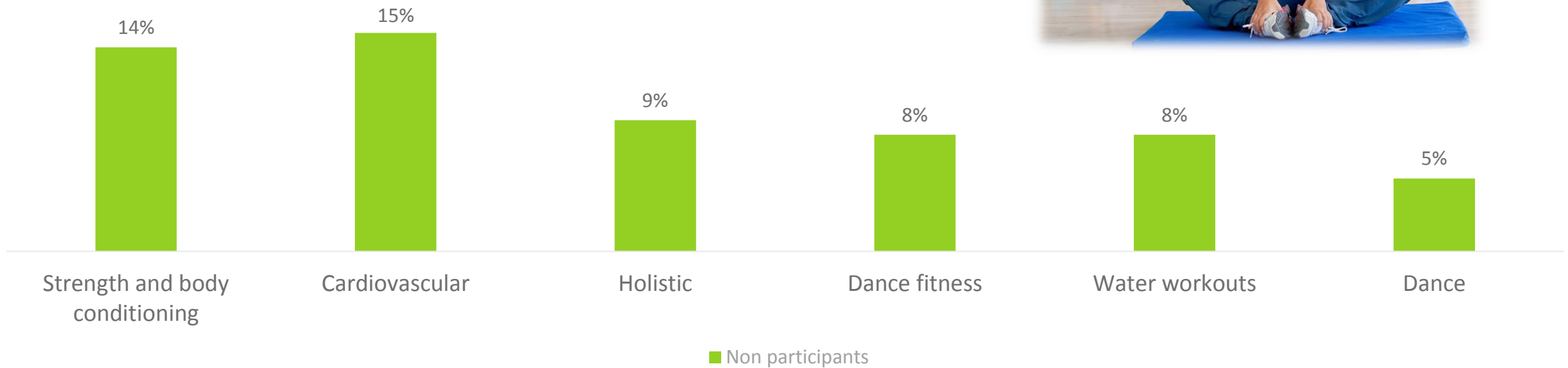


Latent demand

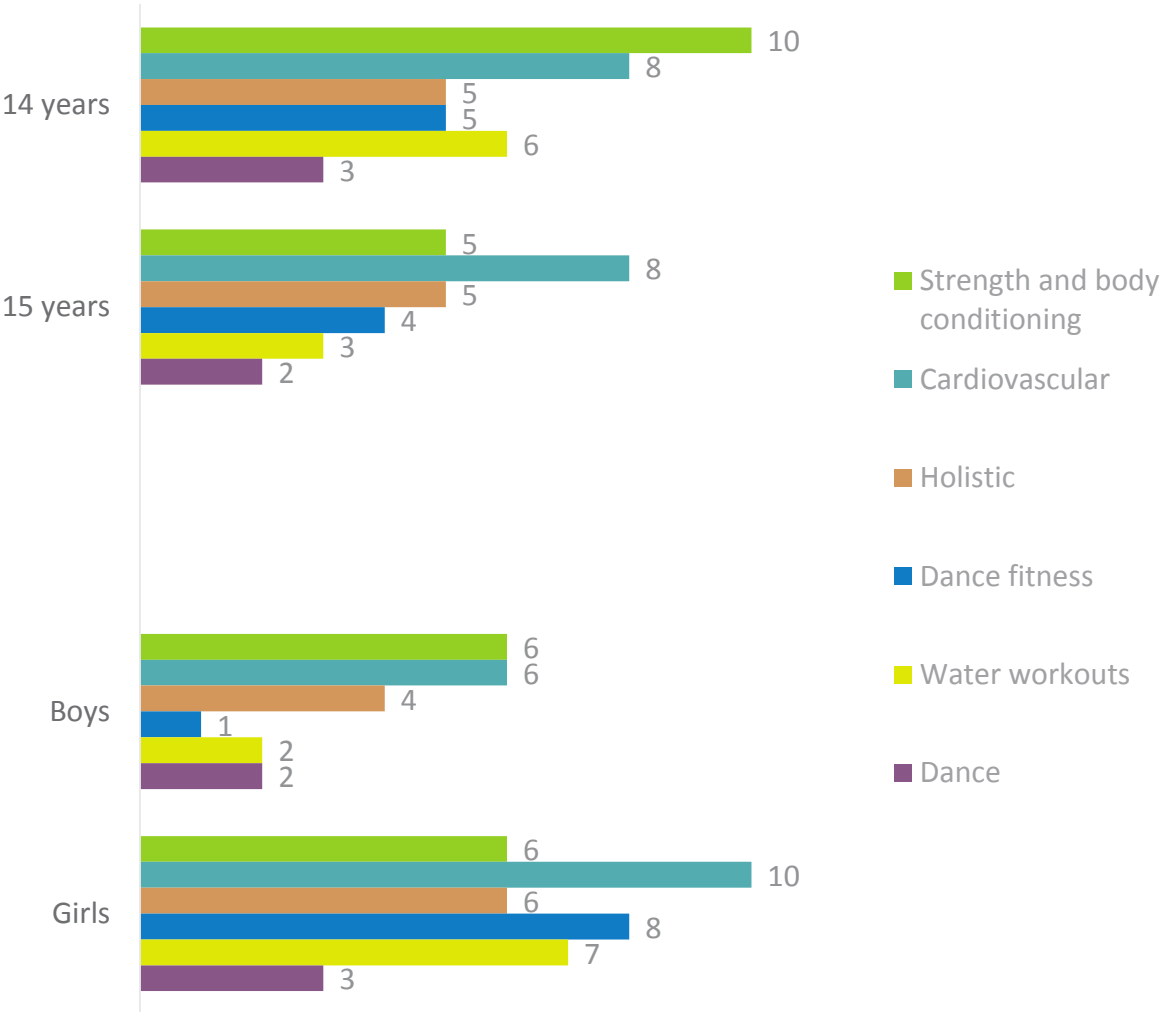


Cardiovascular, strength and body conditioning are the top two styles of group exercise

Net: Interested

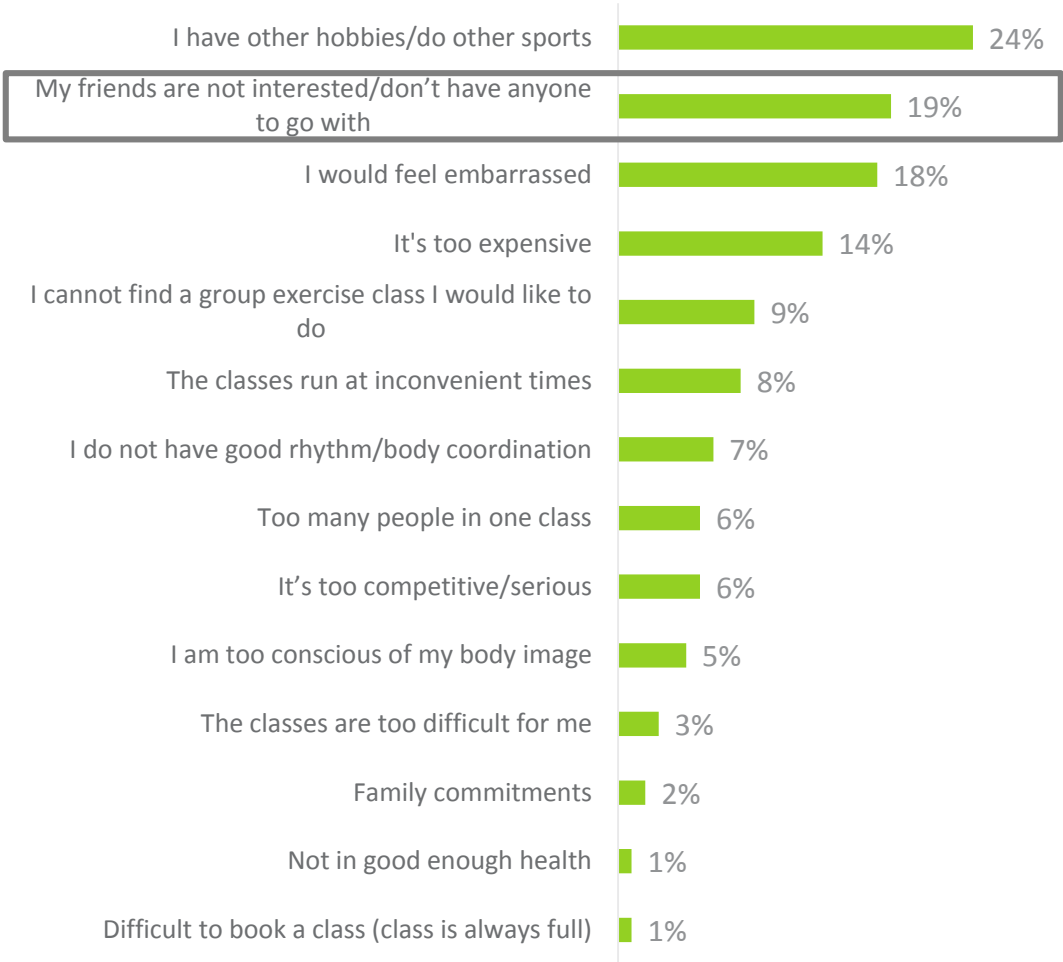


Cardiovascular and dance fitness is more popular amongst girls

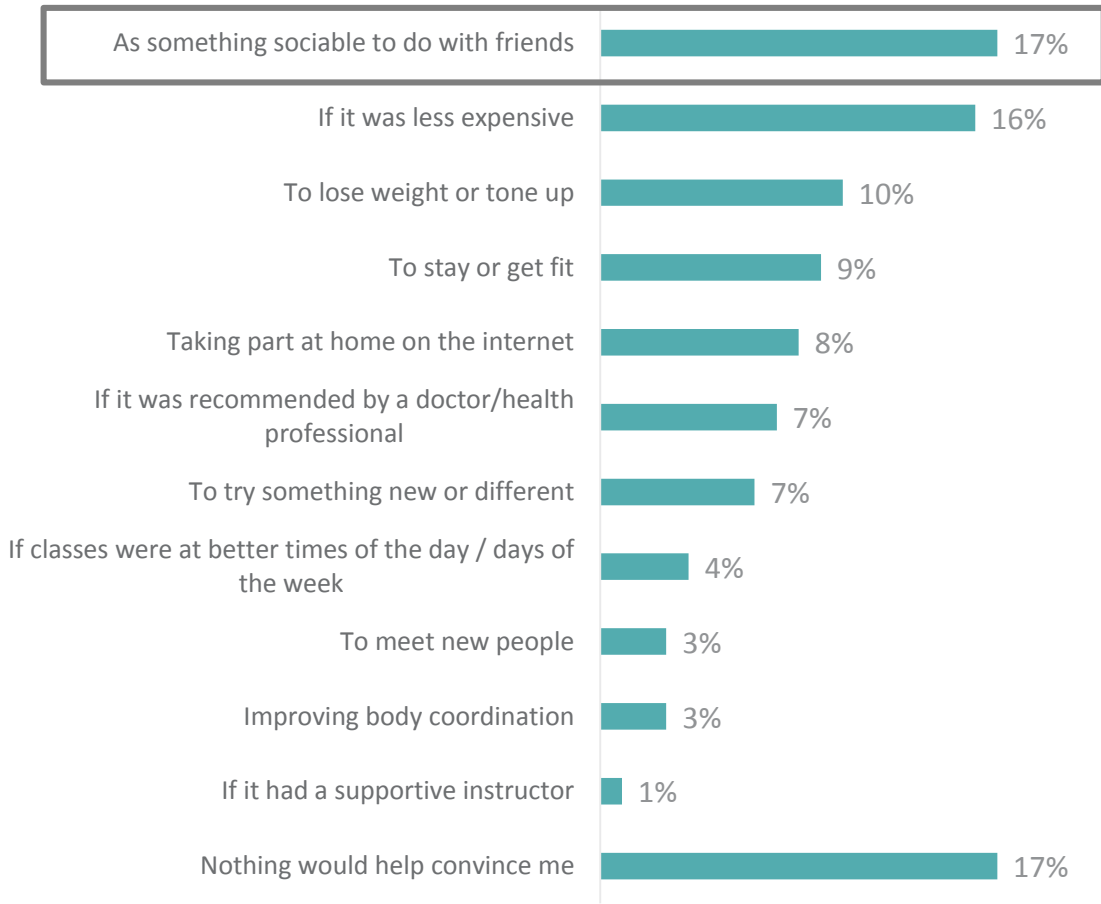


Focusing on the social aspect may encourage participation amongst those do not attend because they have no one to go with

Barriers to attending group exercise classes



Encouraging attendance to group exercise classes



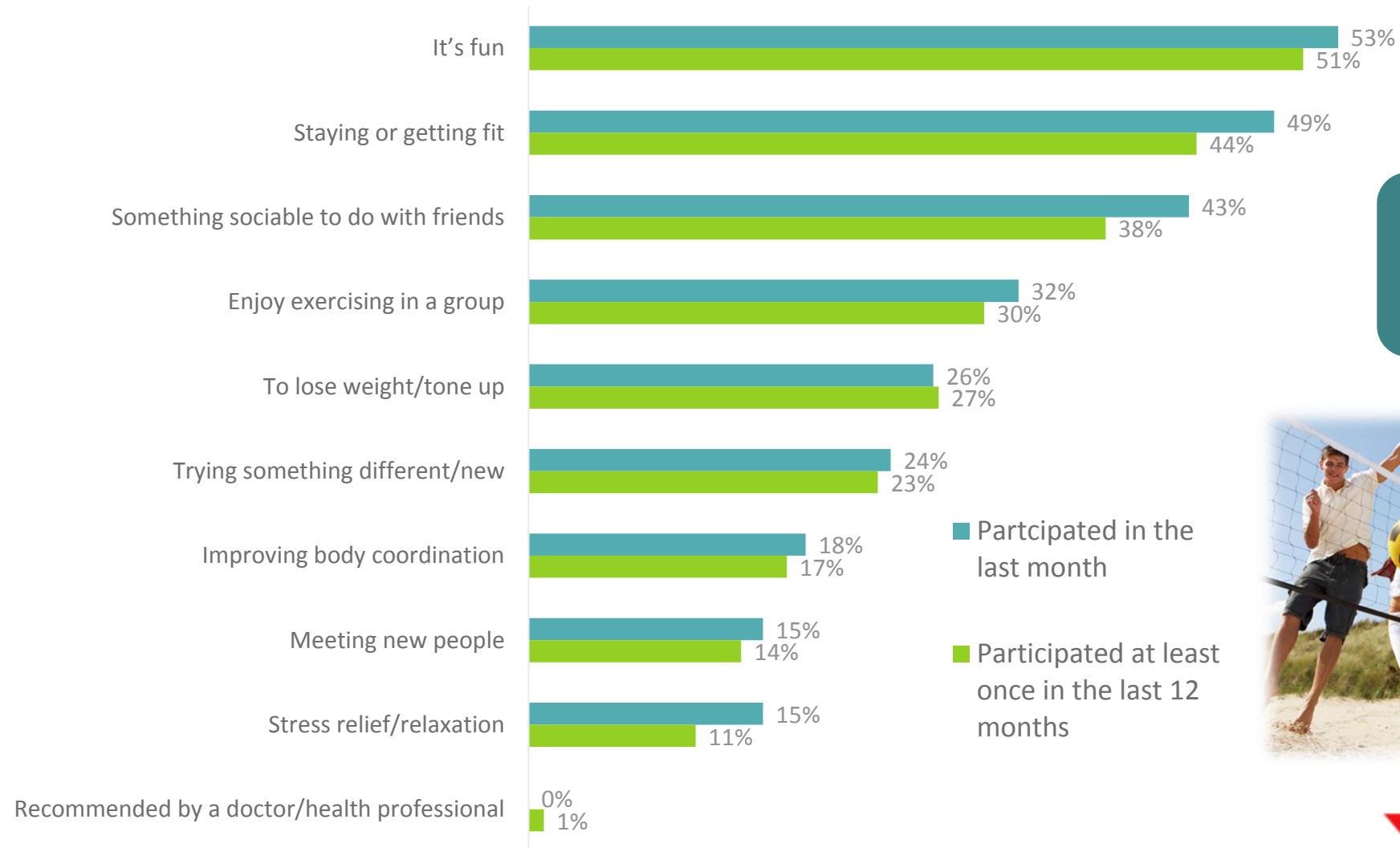
Only showing above 10%



Motivators, barriers and other attitudes



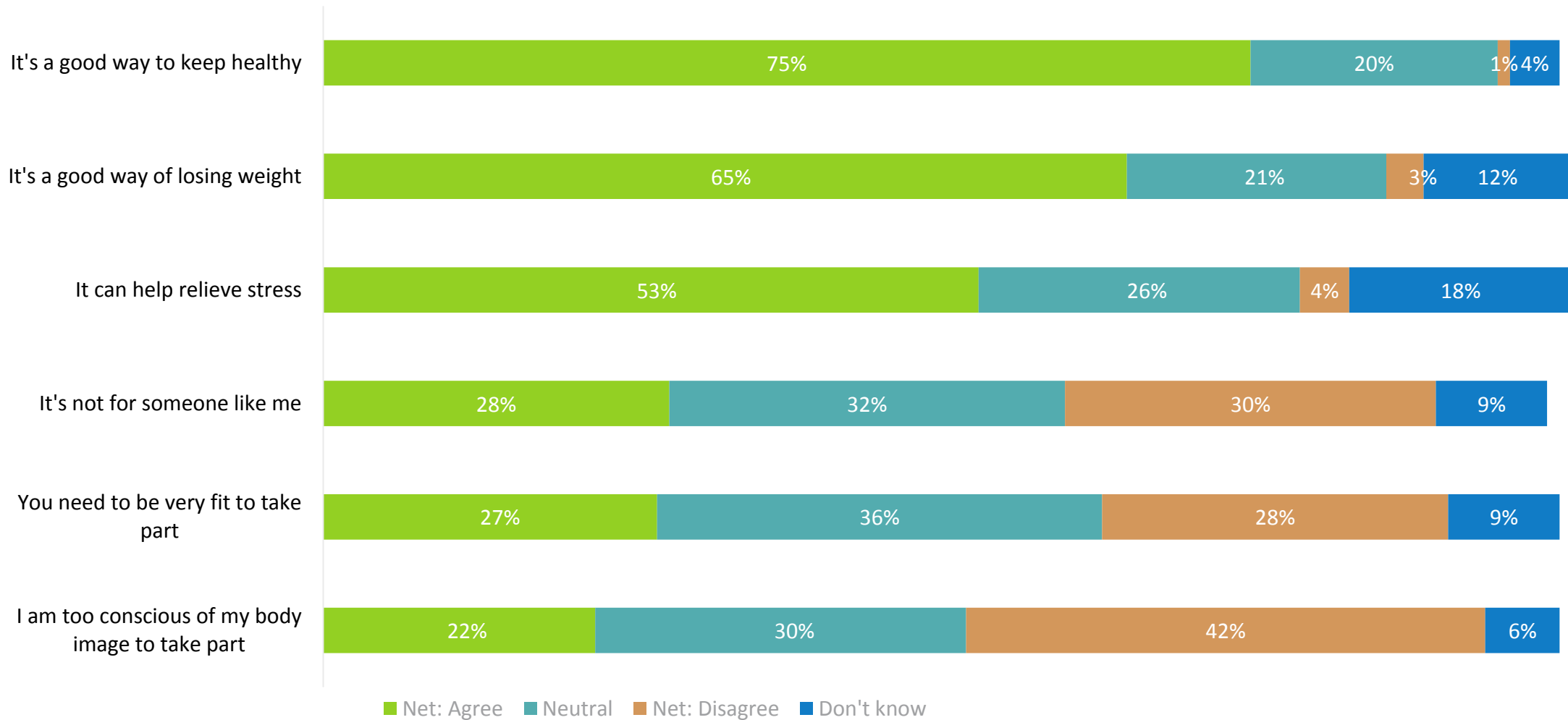
The social aspect along with fitness are the main reasons for participating in group exercise classes



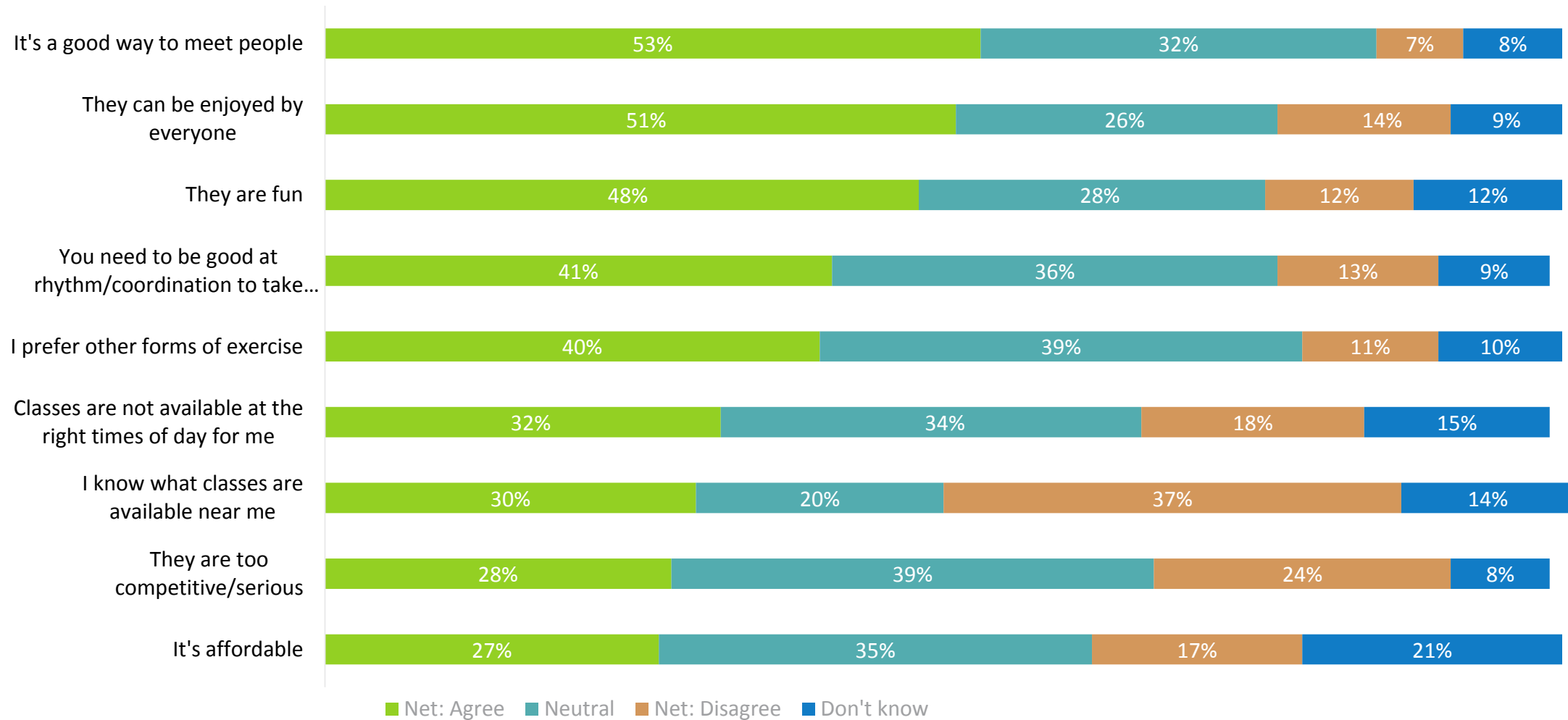
The social aspect is more of a key driver for 14 year olds



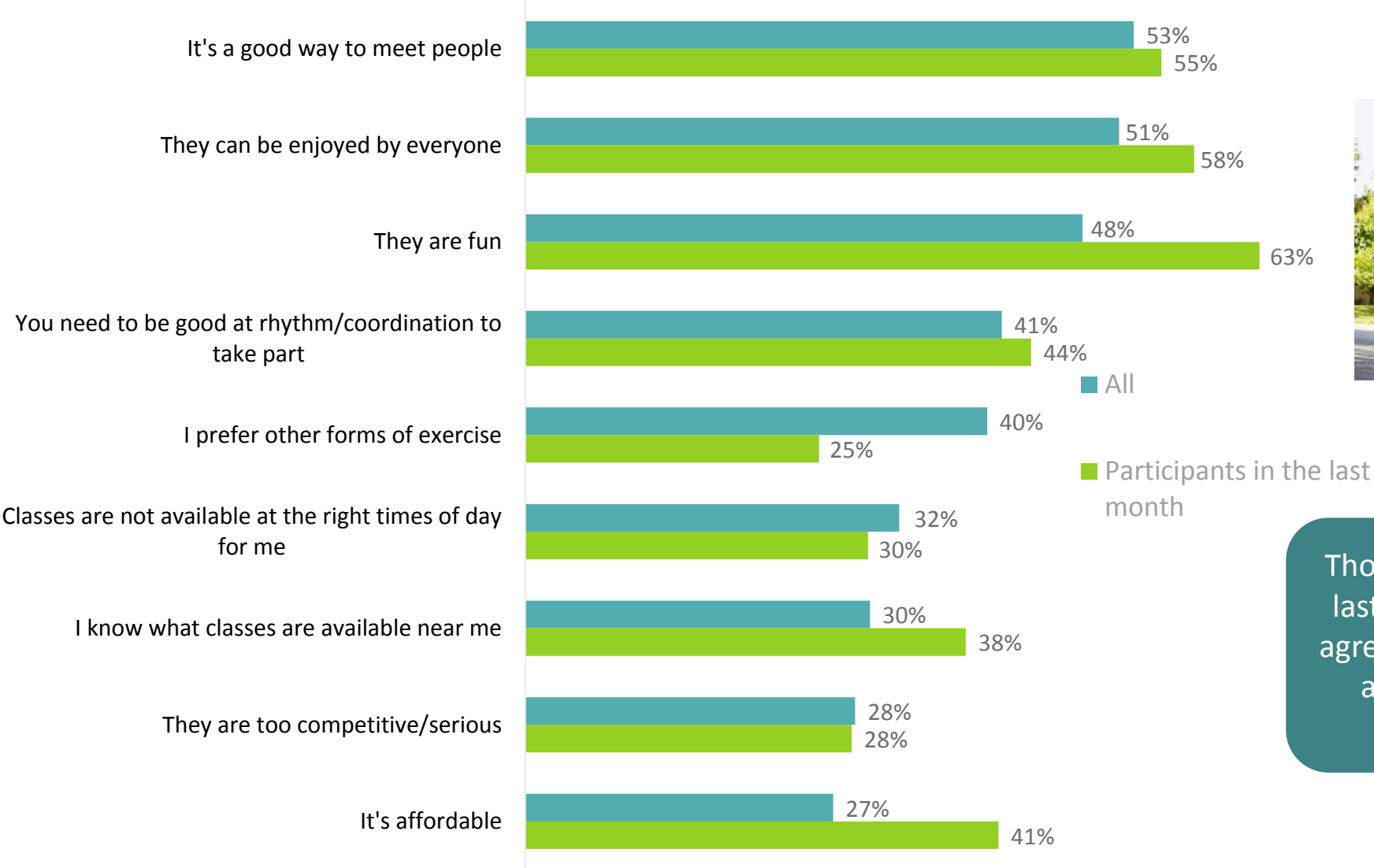
Health and exercise related attitudes



Attitudes towards group exercise



Gap analysis: Attitudes towards group exercise



Those that have attended in the last month have higher level of agreement that group exercise is affordable than the overall sample

