Group exercise participation: National Survey

Gavin Ellison & Fiona Lewis
1. Management Summary
2. Key findings
   a) Headline participation figures
   b) Profile of participants
   c) How they take part
   d) Satisfaction and recommendation
   e) Latent demand
   f) Motivators, barriers and other attitudes
   g) Other sports participation
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.

Q1. Thinking about the last 12 months, how often on average (if at all) have you taken part in any sports or physical recreational activities that lasted for at least 30 minutes?

- Five times a week or more: 28%
- Three or four times a week: 46%
- Once to twice a week: 16%
- Two or three times a month: 4%
- Once a month: 2%
- Once every two or three months: 2%
- Once or twice during the year: 2%
- Nothing in the last 12 months: 4%
- Don’t know: 2%

Base: All 14-15 year olds: 167

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

**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)**

- **Wave 2**
  - To increase fitness: 57%
  - To spend time with friends: 49%
  - To improve health: 43%
  - To improve skill levels: 38%
  - To lose/maintain weight: 35%
  - I enjoy: 34%
  - To compete / enjoy competition: 35%
  - To prepare for a sports event/charity event: 15%
  - Stress relief: 13%
  - To spend time with family: 11%
  - To meet new people: 15%
  - Not applicable - don't want to exercise: 11%
  - Don’t know: 1%

- **Wave 1**
  - To increase fitness: 50%
  - To spend time with friends: 49%
  - To improve health: 43%
  - To improve skill levels: 38%
  - To lose/maintain weight: 35%
  - I enjoy: 34%
  - To compete / enjoy competition: 35%
  - To prepare for a sports event/charity event: 15%
  - Stress relief: 10%
  - To spend time with family: 11%
  - To meet new people: 15%
  - Not applicable - don't want to exercise: 11%
  - Don’t know: 5%

**Prefer to spend time doing other hobbies / activities**
- Wave 2: 25%
- Wave 1: 24%

**Cost**
- Wave 2: 15%
- Wave 1: 14%

**Lack of time due to work**
- Wave 2: 11%
- Wave 1: 14%

**Not enough or good enough facilities nearby**
- Wave 2: 7%
- Wave 1: 11%

**Recent injury/operation/medical reason**
- Wave 2: 7%
- Wave 1: 7%

**Health reasons**
- Wave 2: 5%
- Wave 1: 7%

**Lack of time due to family reasons commitments**
- Wave 2: 5%
- Wave 1: 5%

**Age**
- Wave 2: 4%
- Wave 1: 3%

**Disability**
- Wave 2: 3%
- Wave 1: 3%

**Don’t know**
- Wave 2: 42%
- Wave 1: 48%

**No reasons, I’m happy with amount of exercise I do**
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

In the past week, on how many days have you done a total of 30 min or more of physical activity, which was enough to raise your breathing rate?

Number of days exercised in the past week

- 3% of 14 year olds exercise 7 days a week compared with just 1% of 15 year olds

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q100_rc. In the past week, on how many days have you done a total of 30 min or more of physical activity, which was enough to raise your breathing rate?
(Base: 209)
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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>16%</td>
</tr>
<tr>
<td>Strength &amp; Conditioning</td>
<td>2%</td>
</tr>
<tr>
<td>Cardiovascular</td>
<td>1%</td>
</tr>
<tr>
<td>Holistic</td>
<td>1%</td>
</tr>
<tr>
<td>Dance fitness</td>
<td>1%</td>
</tr>
<tr>
<td>Water workouts</td>
<td>0%</td>
</tr>
<tr>
<td>Dance</td>
<td>10%</td>
</tr>
</tbody>
</table>

*YouGov*
Q14b And _on the days_ that you did _group exercise_ in the last 4 weeks, how long did you usually spend _each day_? (Base: 63)
How they take part
School/college is the most typical place for awareness and participation in group exercise classes

**q18. How did you find out about the group exercise classes you have attended in the last 12 months? q19. Thinking about the last 12 months, where have you taken part in a group exercise class? (Base: Participated at least once in the last 12 months 101)**
Circuits and Zumba are the two most popular styles of classes attended

<table>
<thead>
<tr>
<th>Class</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circuits</td>
<td>15%</td>
</tr>
<tr>
<td>Zumba®</td>
<td>15%</td>
</tr>
<tr>
<td>Body conditioning</td>
<td>10%</td>
</tr>
<tr>
<td>Spinning® / indoor cycling / RPM</td>
<td>9%</td>
</tr>
<tr>
<td>Street Dance</td>
<td>8%</td>
</tr>
<tr>
<td>Self defence</td>
<td>8%</td>
</tr>
<tr>
<td>Step Aerobics</td>
<td>8%</td>
</tr>
<tr>
<td>Cheerleading</td>
<td>8%</td>
</tr>
<tr>
<td>Dance Aerobics</td>
<td>8%</td>
</tr>
<tr>
<td>Boxercise</td>
<td>7%</td>
</tr>
<tr>
<td>Core stability</td>
<td>7%</td>
</tr>
<tr>
<td>Pure abs/core</td>
<td>7%</td>
</tr>
<tr>
<td>Aerobics</td>
<td>7%</td>
</tr>
<tr>
<td>Yoga</td>
<td>7%</td>
</tr>
<tr>
<td>Ballet</td>
<td>6%</td>
</tr>
<tr>
<td>Contemporary dancing</td>
<td>5%</td>
</tr>
<tr>
<td>Tap dancing</td>
<td>5%</td>
</tr>
<tr>
<td>BODYPUMP™</td>
<td>4%</td>
</tr>
<tr>
<td>Party / Club / Rave Fitness</td>
<td>4%</td>
</tr>
<tr>
<td>Tap dance</td>
<td>4%</td>
</tr>
<tr>
<td>Cultural dance (e.g. African / Caribbean /...)</td>
<td>4%</td>
</tr>
</tbody>
</table>
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.
Amongst those who monthly attend group exercise classes, 3 in 10 were not doing any exercise before

- Took part in social or competitive sports: 38%
- Did other exercise or fitness activities: 50%
- Didn’t do any other sport, exercise or fitness: 29%

q5c. Before you started taking group exercises classes which of the following did you do? Please tick all that apply (All participated in the last month: 72)
Satisfaction and interest
High satisfaction levels on key aspects of group exercise while improvements in satisfaction could be made to cost.

Overall satisfaction

<table>
<thead>
<tr>
<th></th>
<th>Very satisfied</th>
<th>Quite satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Quite dissatisfied</th>
<th>Very dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching</td>
<td>5%</td>
<td>9%</td>
<td>40%</td>
<td>40%</td>
<td>5%</td>
</tr>
<tr>
<td>Level of the class</td>
<td>3%</td>
<td>3%</td>
<td>11%</td>
<td>47%</td>
<td>29%</td>
</tr>
<tr>
<td>Number of people</td>
<td>2%</td>
<td>5%</td>
<td>14%</td>
<td>50%</td>
<td>24%</td>
</tr>
<tr>
<td>Venue</td>
<td>2%</td>
<td>19%</td>
<td>39%</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>Easy to book</td>
<td>1%</td>
<td>13%</td>
<td>23%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Cost</td>
<td>2%</td>
<td>8%</td>
<td>17%</td>
<td>25%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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.

| Style                     | Interest
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength and body conditioning</td>
<td>14%</td>
</tr>
<tr>
<td>Cardiovascular</td>
<td>15%</td>
</tr>
<tr>
<td>Holistic</td>
<td>9%</td>
</tr>
<tr>
<td>Dance fitness</td>
<td>8%</td>
</tr>
<tr>
<td>Water workouts</td>
<td>8%</td>
</tr>
<tr>
<td>Dance</td>
<td>5%</td>
</tr>
</tbody>
</table>

q29 How interested are you in attending group exercise classes in the future? (Base: Non participants 107)
Cardiovascular and dance fitness is more popular amongst girls

q29 How interested are you in attending group exercise classes in the future? (Base: Men (24), Female (44), 14 years (28) 15 years (40))
Focusing on the social aspect may encourage participation amongst those who do not attend because they have no one to go with.

**Barriers to attending group exercise classes**

- I have other hobbies/do other sports: 24%
- My friends are not interested/don’t have anyone to go with: 19%
- I would feel embarrassed: 18%
- It’s too expensive: 14%
- I cannot find a group exercise class I would like to do: 9%
- The classes run at inconvenient times: 8%
- I do not have good rhythm/body coordination: 7%
- Too many people in one class: 6%
- It’s too competitive/serious: 6%
- I am too conscious of my body image: 5%
- The classes are too difficult for me: 3%
- Family commitments: 2%
- Not in good enough health: 1%
- Difficult to book a class (class is always full): 1%

**Encouraging attendance to group exercise classes**

- As something sociable to do with friends: 17%
- If it was less expensive: 16%
- To lose weight or tone up: 10%
- To stay or get fit: 9%
- Taking part at home on the internet: 8%
- If it was recommended by a doctor/health professional: 7%
- To try something new or different: 7%
- If classes were at better times of the day / days of the week: 4%
- To meet new people: 3%
- Improving body coordination: 3%
- If it had a supportive instructor: 1%
- Nothing would help convince me: 17%

(Only showing above 10%)

q31_p12mths_0_rc. Which of the following, if any, are reasons why you don’t take part in group exercise classes? (Base: Non participants 107)

q36_p12mths_0_rc. Which, if any, of these might motivate you take part in group exercise classes? (Base: Non participants 107)
Motivators, barriers and other attitudes
The social aspect along with fitness are the main reasons for participating in group exercise classes.

- **It’s fun**: 51% (53%)
- **Staying or getting fit**: 49% (44%)
- **Something sociable to do with friends**: 43% (38%)
- **Enjoy exercising in a group**: 30% (32%)
- **To lose weight/tone up**: 27% (26%)
- **Trying something different/new**: 23% (24%)
- **Improving body coordination**: 17% (18%)
- **Meeting new people**: 14% (15%)
- **Stress relief/relaxation**: 11% (15%)
- **Recommended by a doctor/health professional**: 1% (0%)

q23. What are your reasons for taking part in group exercise classes? Please tick all that apply. (Monthly Participants: 398, Weekly: 201)

The social aspect is more of a key driver for 14 year olds.
## Health and exercise related attitudes

<table>
<thead>
<tr>
<th>Statement</th>
<th>Net: Agree</th>
<th>Neutral</th>
<th>Net: Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's a good way to keep healthy</td>
<td>75%</td>
<td>20%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>It's a good way of losing weight</td>
<td>65%</td>
<td>21%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>It can help relieve stress</td>
<td>53%</td>
<td>26%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>It's not for someone like me</td>
<td>28%</td>
<td>32%</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>You need to be very fit to take part</td>
<td>27%</td>
<td>36%</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>I am too conscious of my body image to take part</td>
<td>22%</td>
<td>30%</td>
<td>42%</td>
<td>6%</td>
</tr>
</tbody>
</table>

q37_1. To what extent do you agree or disagree with the following statements about group exercise classes? All (158)
<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's a good way to meet people</td>
<td>53%</td>
<td>32%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>They can be enjoyed by everyone</td>
<td>51%</td>
<td>26%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>They are fun</td>
<td>48%</td>
<td>28%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>You need to be good at rhythm/coordination to take...</td>
<td>41%</td>
<td>36%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>I prefer other forms of exercise</td>
<td>40%</td>
<td>39%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Classes are not available at the right times of day for me</td>
<td>32%</td>
<td>34%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>I know what classes are available near me</td>
<td>30%</td>
<td>20%</td>
<td>37%</td>
<td>14%</td>
</tr>
<tr>
<td>They are too competitive/serious</td>
<td>28%</td>
<td>39%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>It's affordable</td>
<td>27%</td>
<td>35%</td>
<td>17%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Gap analysis: Attitudes towards group exercise

- It's a good way to meet people: 53% (55%)
- They can be enjoyed by everyone: 51% (58%)
- They are fun: 48% (63%)
- You need to be good at rhythm/coordination to take part: 41% (44%)
- I prefer other forms of exercise: 25% (40%)
- Classes are not available at the right times of day for me: 32% (30%)
- I know what classes are available near me: 30% (38%)
- They are too competitive/serious: 28% (28%)
- It's affordable: 27% (41%)

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

All (158); Participants in the last month (71)