



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*

Management summary



Management summary

- ❖ 14.4% of women participate in group exercise weekly, and 41.3% annually (at least once). When including men and women the percentages reduce to 9.6% weekly and 30.0% annually (at least once)

Group exercise participants

- ❖ Private gyms and leisure centres are the most popular venues for group exercise classes, with cardiovascular being the most popular style
- ❖ Despite cardiovascular being the most popular style, a higher proportion have tried holistic style exercise (yoga, pilates) than cardiovascular
- ❖ A majority attend group exercise classes by themselves while 1 in 4 attend with a friend
- ❖ Before participating in group exercise classes, a fifth (20%) were not doing any other form of exercise

Latent Demand

- ❖ A third of women (who are not currently participating in group exercise but would like to) are interested in holistic style exercise
- ❖ The main reason why women do not participate in group exercise is due to it being perceived as too expensive, challenging the perception of cost along with promoting the health benefits may increase participation levels

Health benefits and Attitude towards dance fitness

- ❖ The main reasons why people attend group exercise classes are for health benefits (getting fit, losing weight) and to have fun
- ❖ Both men and women (including those who do not participate) perceive group exercise as having good health benefits
- ❖ A higher proportion of women (70%) than men (45%) agree that group exercise helps relieve stress
- ❖ Women have a more positive attitude towards group exercise as a good way to meet people, while men prefer other forms of exercise

General participation in sports amongst women

- ❖ A fifth of women have not participated in any physical exercise in the last 12 months, while half of women exercise at least once a week
- ❖ The main reason for exercising is to improve health and fitness

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:

- Men and women nationally representative
- Women nationally representative
- Men nationally representative
- All who have participated in group exercise in the last 12 months
- 14 and 15 years olds

Key



Men and women nationally representative



Men nationally representative



14 and 15 year olds



Women nationally representative



Group exercise participants

YouGov

Headline Participation

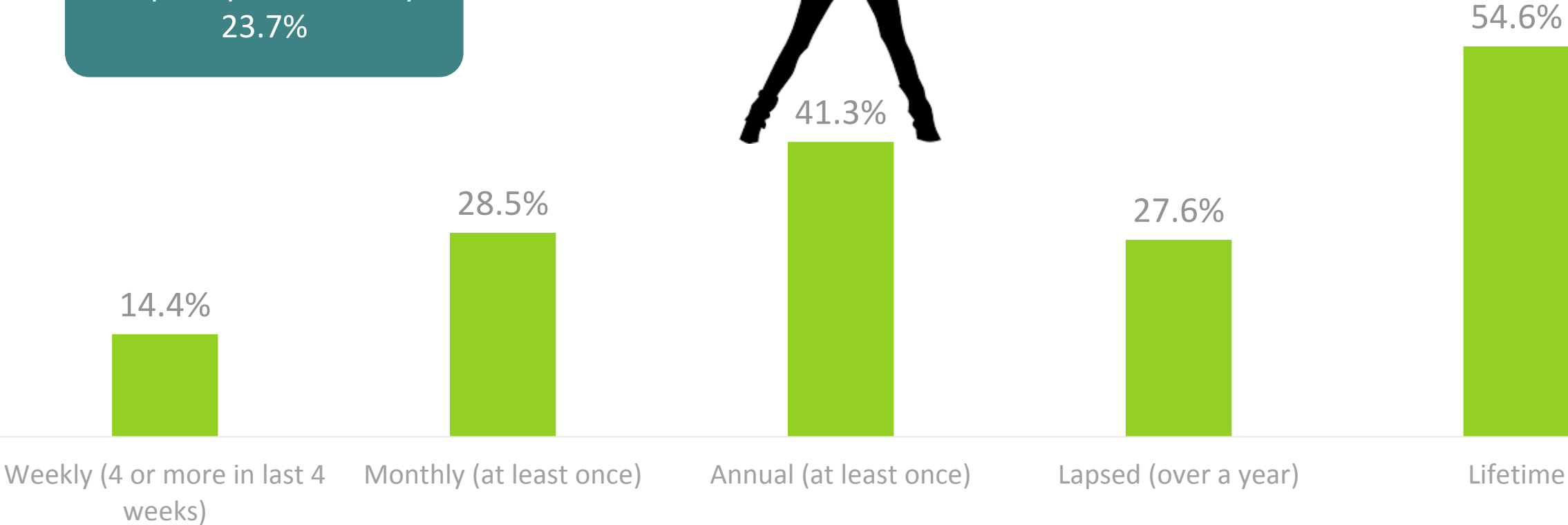


Headline participation

Women (Nat Rep)



Unprompted monthly
23.7%



Prompted

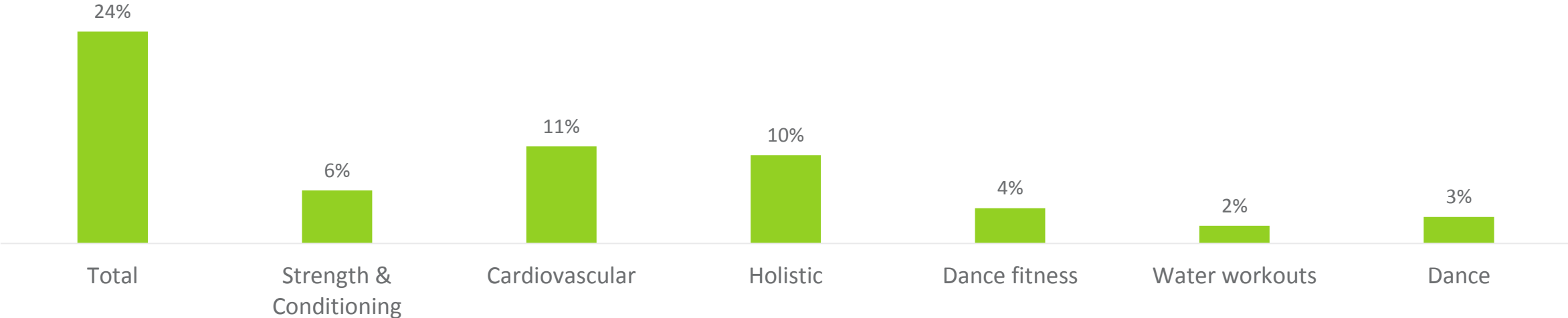


Cardiovascular and holistic exercise are the two most popular styles among all women (unprompted)

Women (Nat Rep)



Sports and physical activities in the last 4 weeks



q2_coded. Please think about all the sports and physical recreational activities you did in the **last 4 weeks for 30 minutes or more**, whether for health and fitness, competition, socially, training or receiving tuition, but do not include any teaching, coaching or refereeing you may have done. (Base: total 1219)

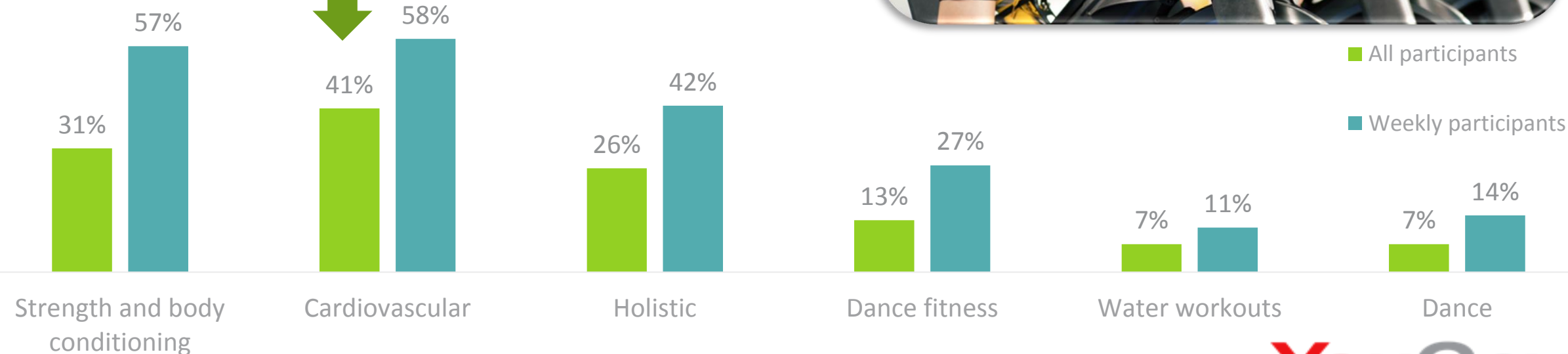


Cardiovascular is the most popular style of group exercise among participants

Half (51%) who did not do any sport or exercise before have participated in cardiovascular group exercise in the last 4 weeks



Within the last 4 weeks



YouGov

Strength and body conditioning is the most popular style of group exercise amongst weekly participants

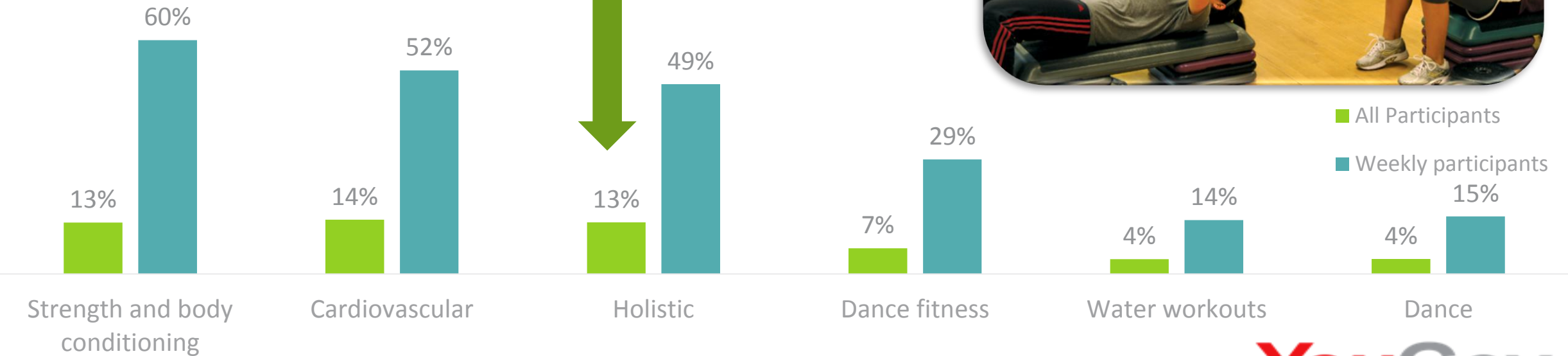
Women
(Nat Rep)



45% who did not do any sport or exercise before have participated in holistic group exercise in the last 4 weeks



Within the last 4 weeks

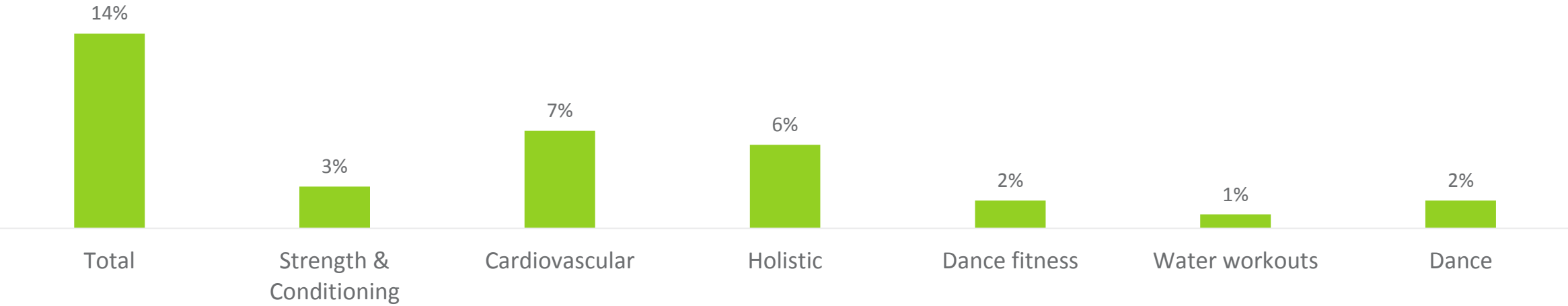


Cardiovascular and holistic is slightly more popular than other group exercise styles among all men and women (unprompted)

Men & Women (Nat Rep)



Sports and physical activities in the last 4 weeks



q2_coded. Please think about all the sports and physical recreational activities you did in the **last 4 weeks for 30 minutes or more**, whether for health and fitness, competition, socially, training or receiving tuition, but do not include any teaching, coaching or refereeing you may have done. (Base: total 315)
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: 1468)

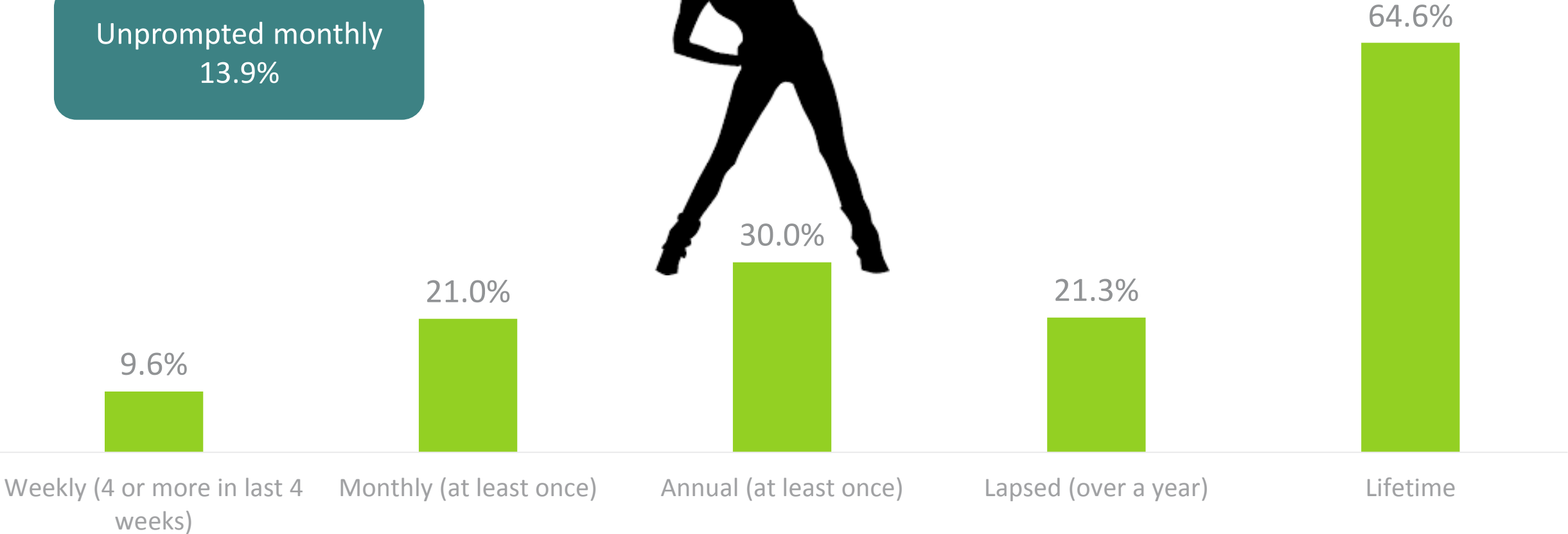


Headline participation

Men & Women (Nat Rep)



Unprompted monthly
13.9%



Prompted

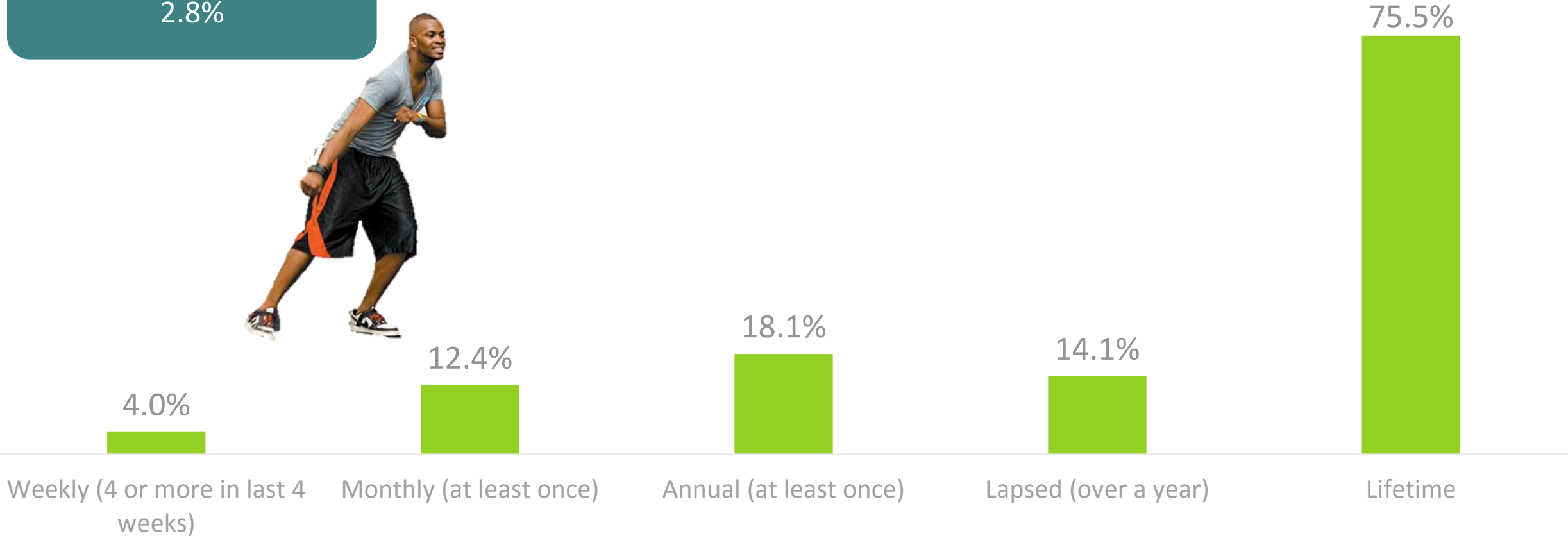


Headline participation

Men
Nat Rep



Unprompted monthly
2.8%

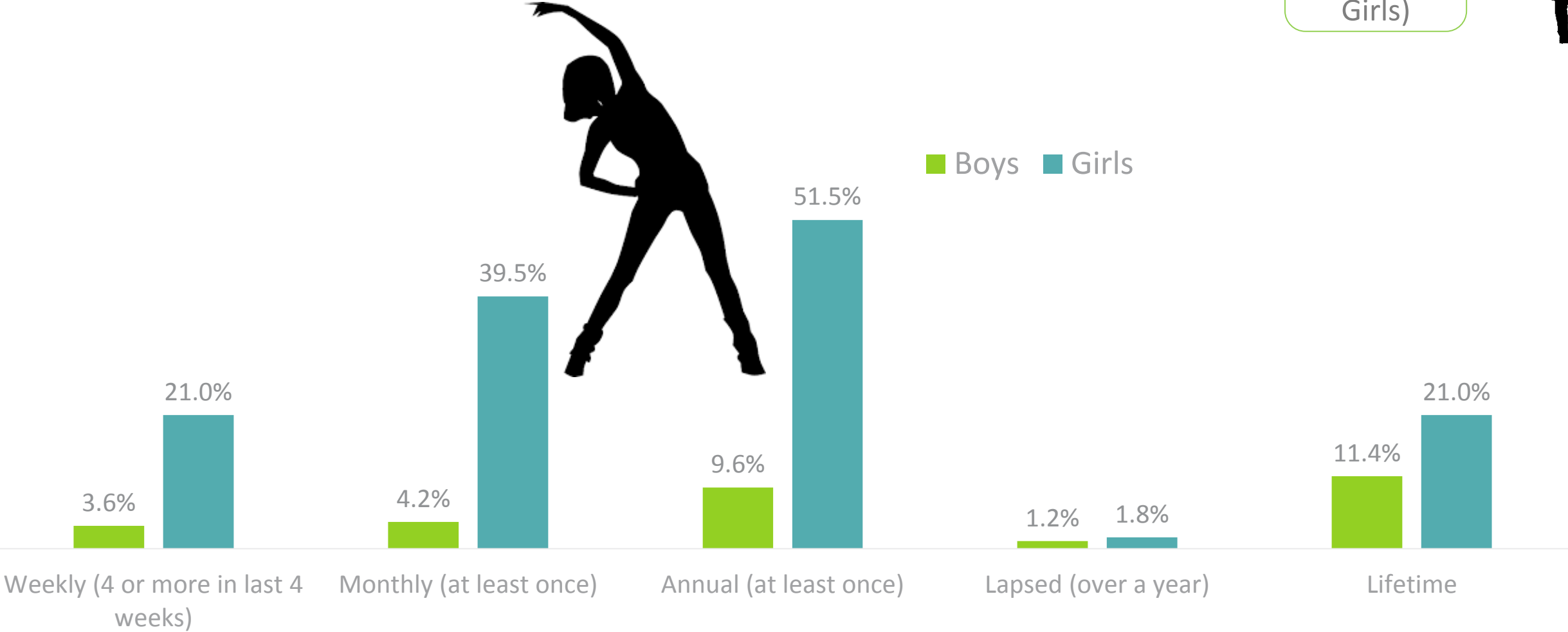


Prompted



Headline participation

14 & 15s
(Boys & Girls)

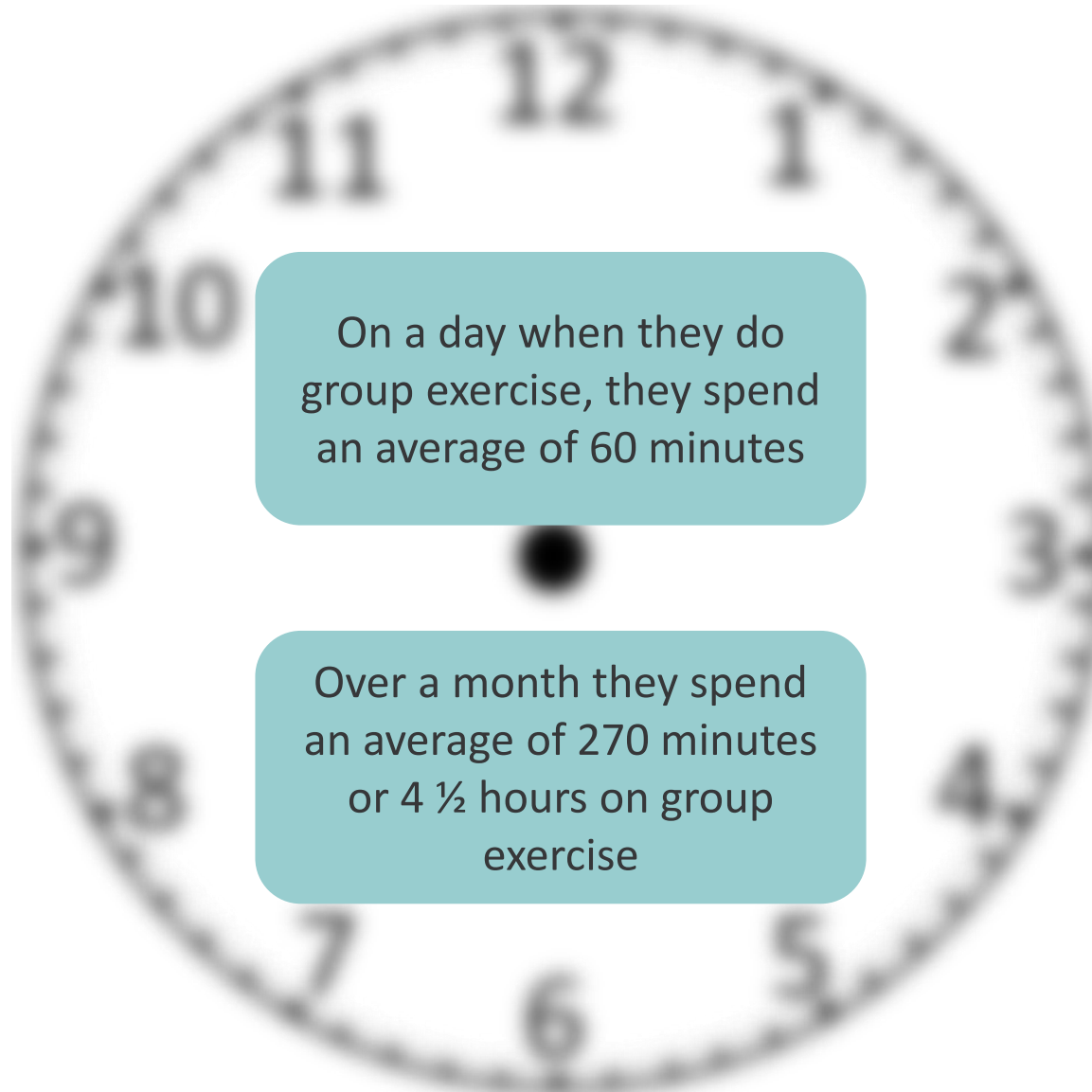


Boys Girls

Prompted



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 270 minutes or 4 ½ hours on group exercise



YouGov

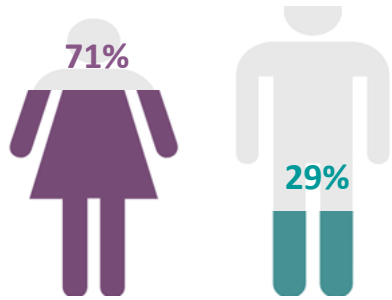
Profile of participants



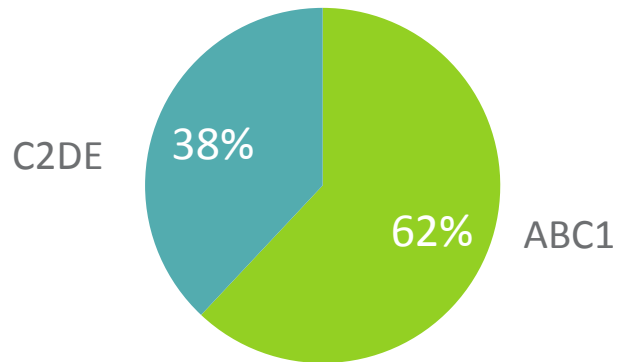
Group participants– demographic profile



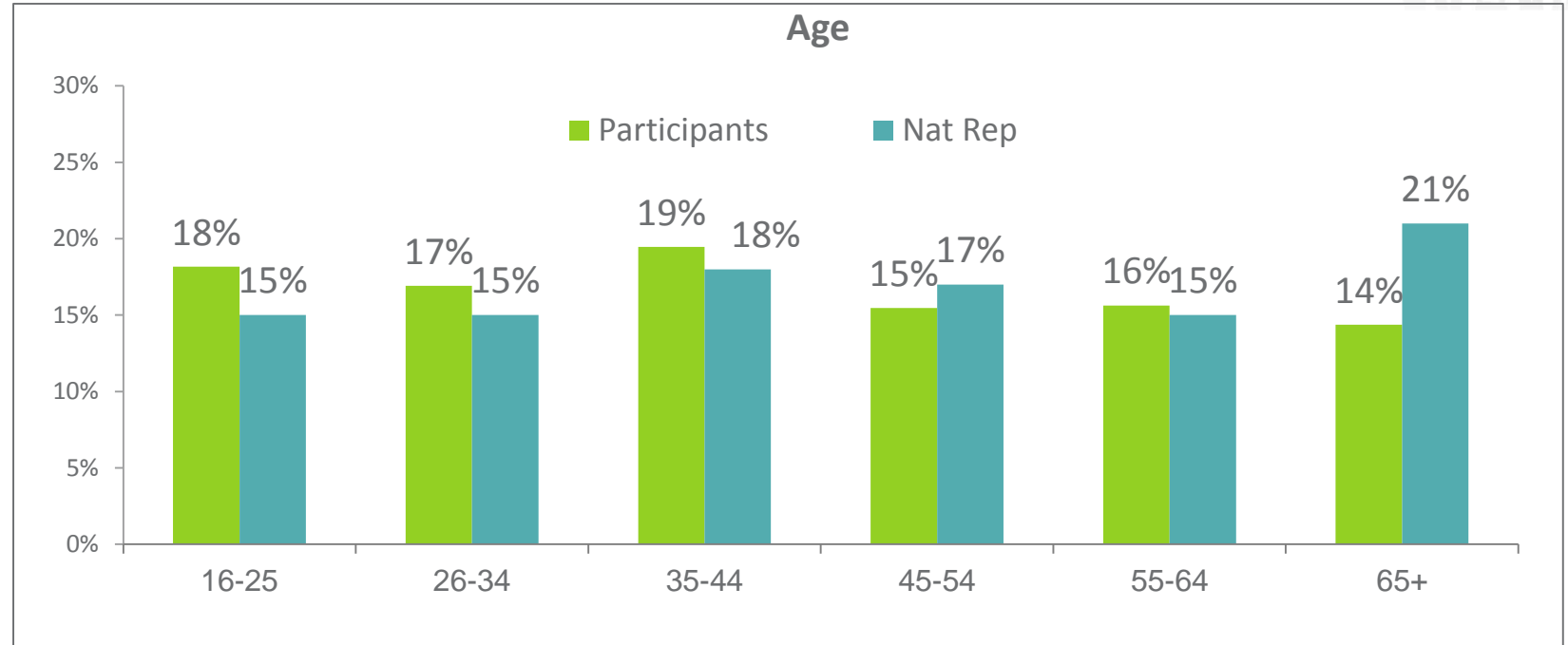
Gender & Social Grade



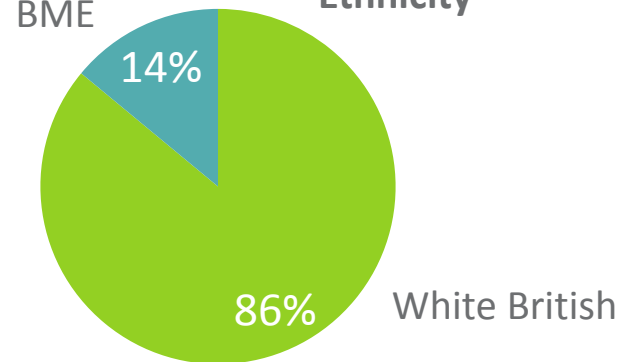
Nat Rep – 51% women; 49% men



Nat rep – 53% ABC1; 47% C2DE



Ethnicity



Nat Rep – 87% White British; 13% BME

Disability

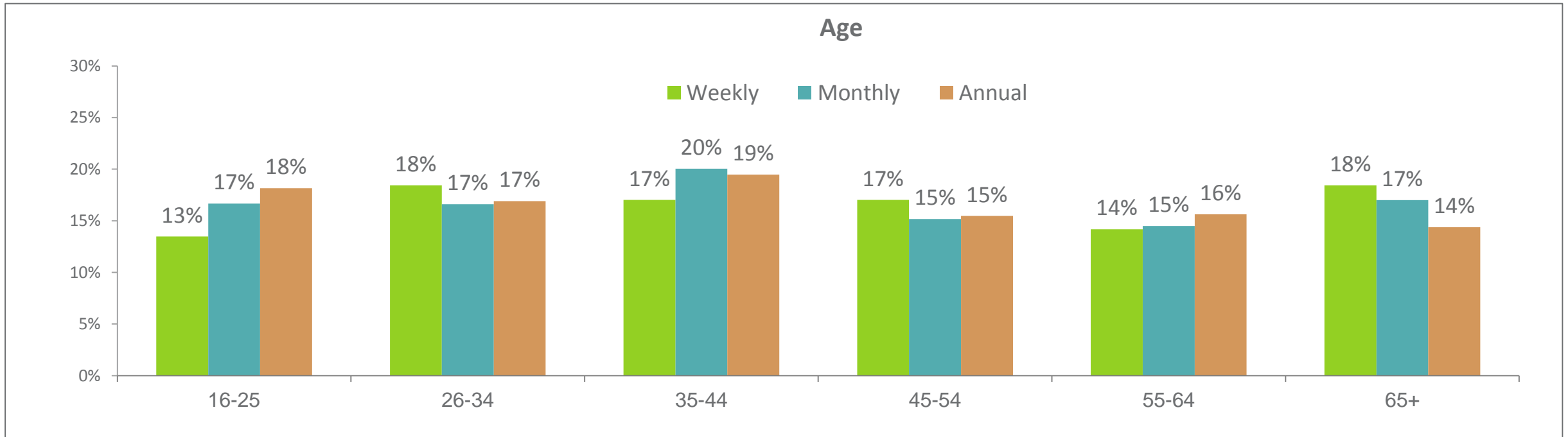


12% asthma
9% arthritis
4% cancer

Nat Rep – 20% Disability

YouGov

Group exercise participants of different levels

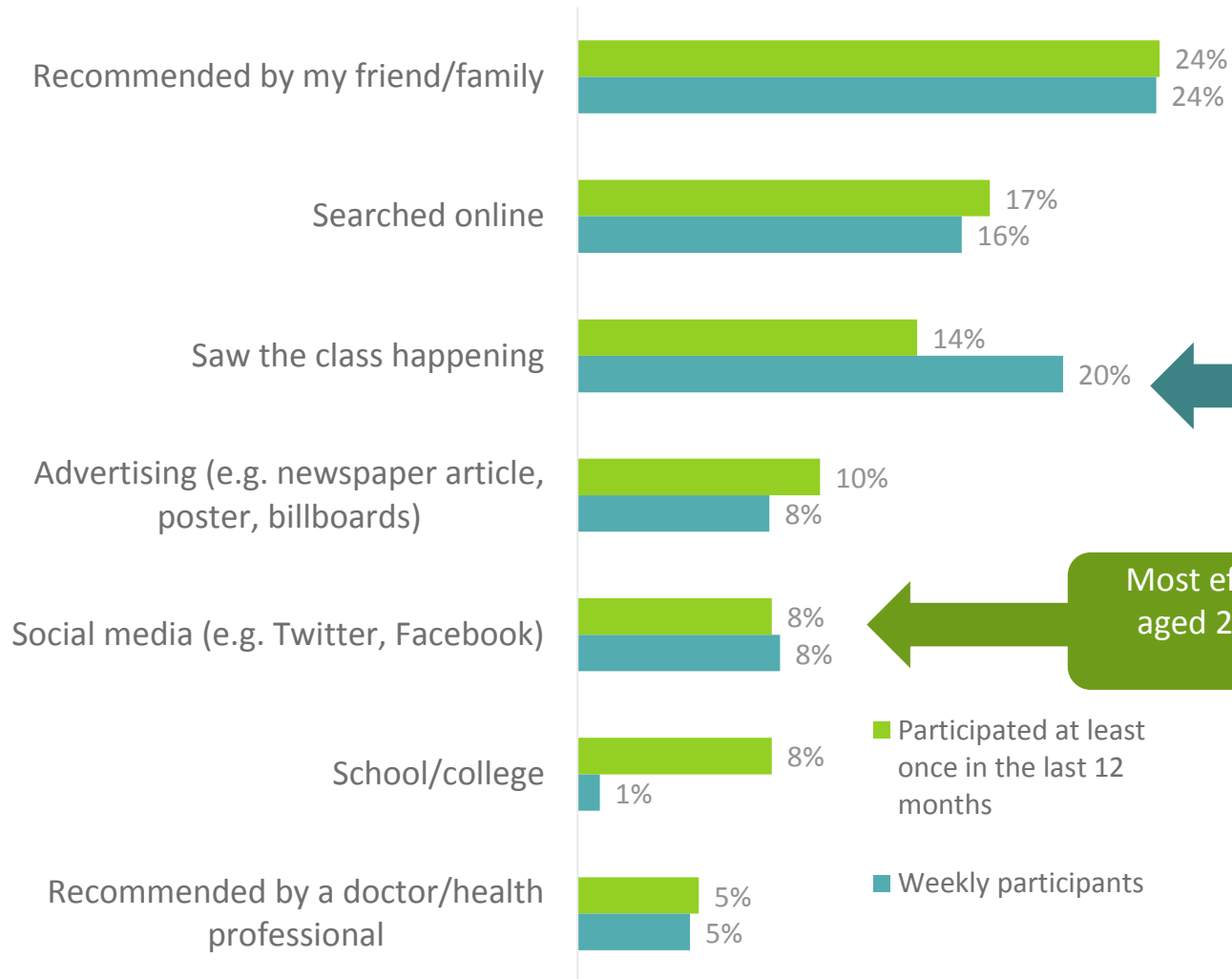


Base: All participants (taking part in group exercise in the last months) (16years + n=562)

How they take part



Recommendation by family/friend is the most popular way of finding out about group exercise classes



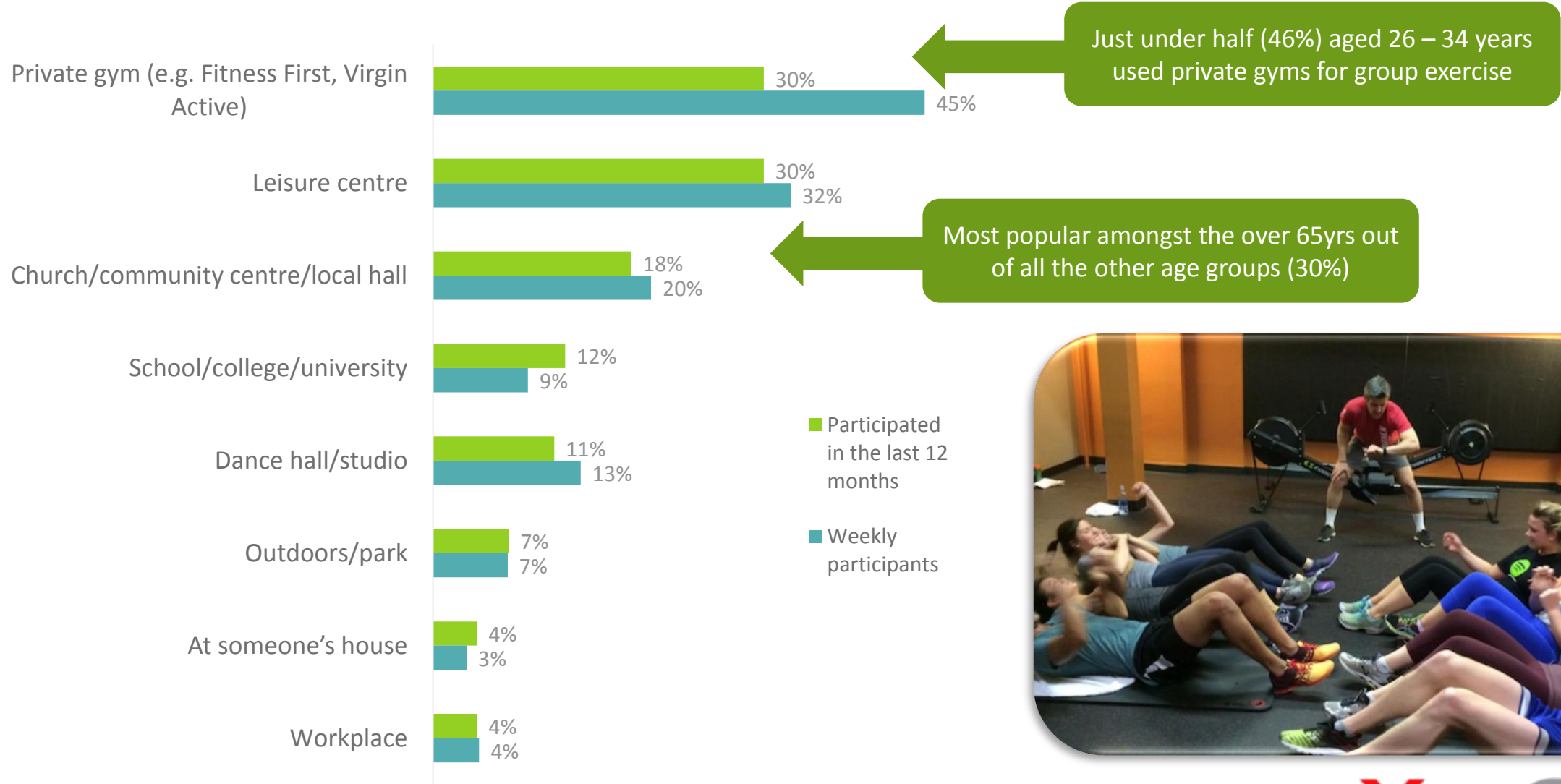
1 in 5 who are weekly attendance become aware by seeing the class happening

Most effective way of targeting those aged 25 – 34 years (20% used social media)



YouGov

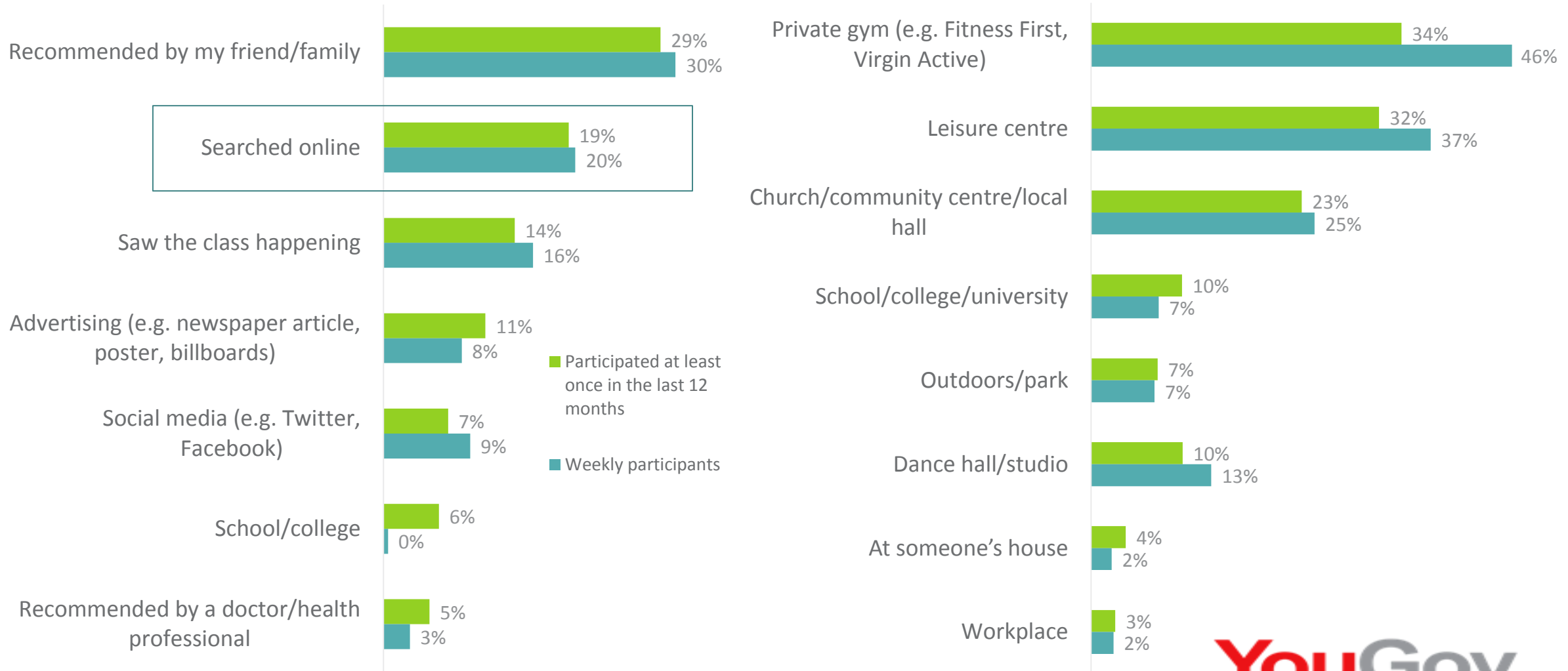
Private gyms and leisure centres are the most popular places for group exercise classes



YouGov

1 in 5 women searched online to find a group exercise class

Women only

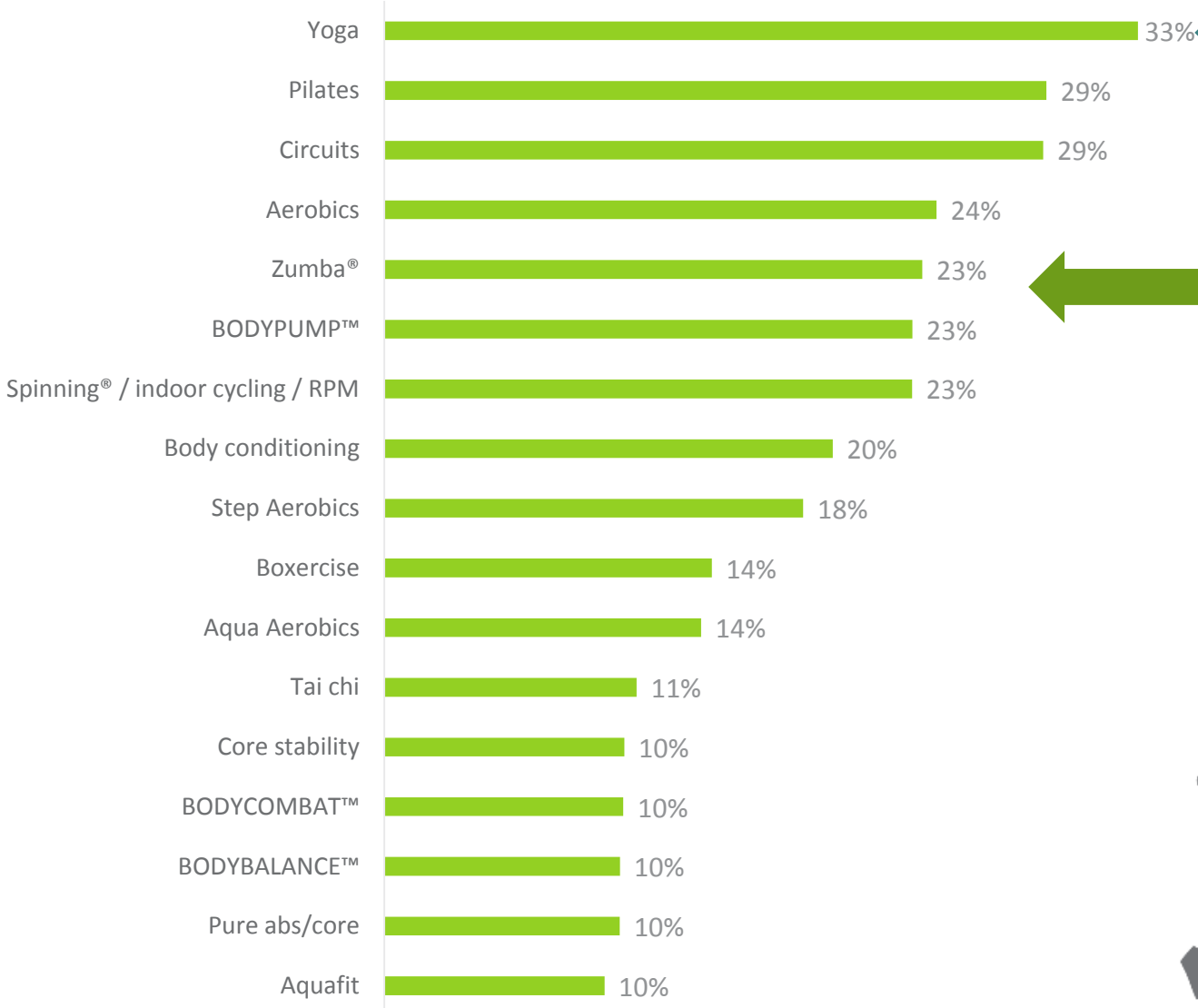


q18. How did you find out about the group exercise classes you have attended in the last 12 months (Base: Participants 515, weekly 190)
 q19. Thinking about the last 12 months, where have you taken part in a group exercise class? (Base: Participants 515, weekly 190)

A third of those who participate in group exercise have tried a yoga class



All group exercise



Yoga is most popular amongst those aged 55-64 than any other age group (41%)

Zumba is most popular group exercise among 16-25 (29%)
Over 1 in 4 (28%) who were not doing any sport or exercise before have attended Zumba

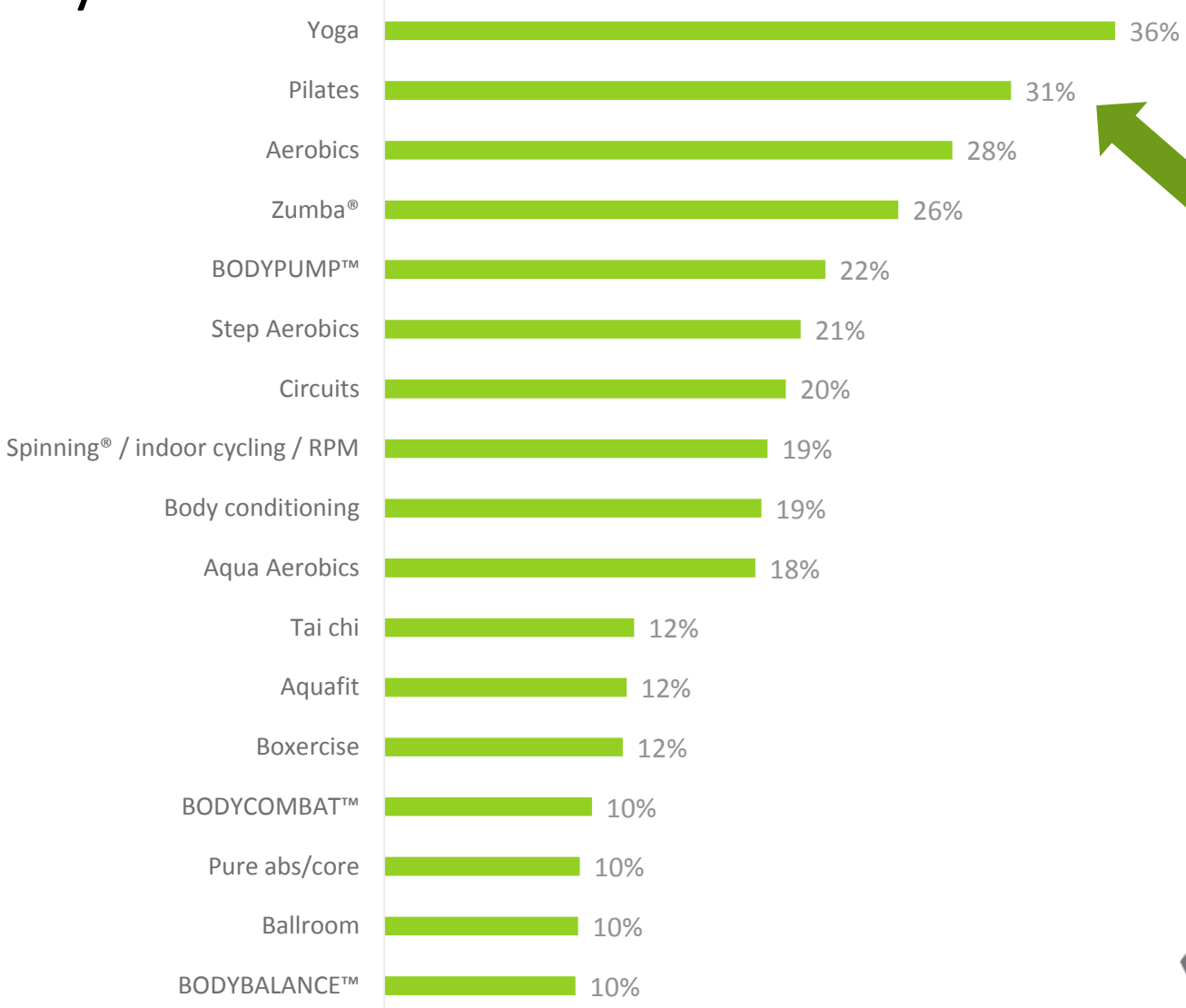


Among women, yoga and pilates are the top two most popular styles

Women only

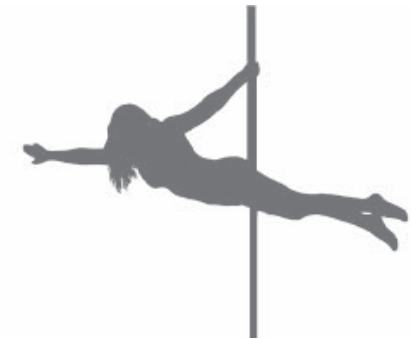


All group exercise



Yoga is most popular amongst those aged 35-44 than any other age group (42%)

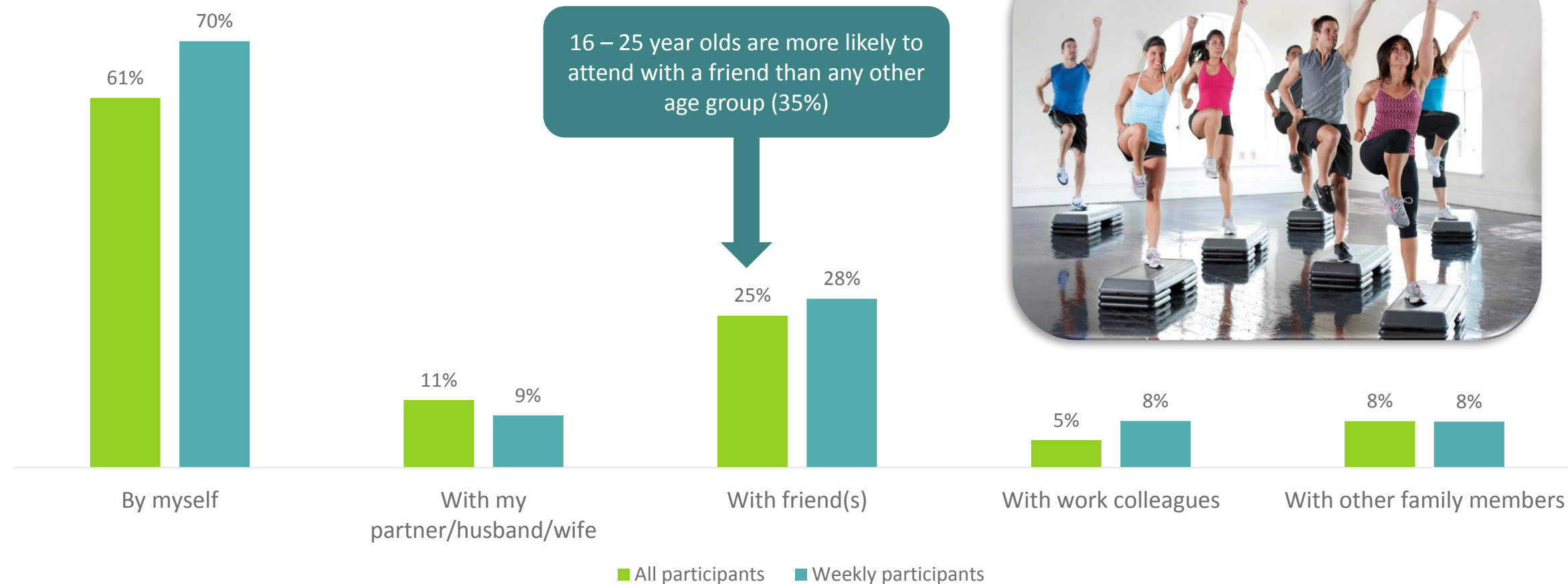
Zumba is most popular group exercise among 16-25 (29%)
Two fifths (39%) who were not doing any sport or exercise before have attended Pilates





A majority attend group exercise classes on their own

Two thirds from social grade ABC1 (66%) are likely to attend by themselves than those from social grade C2DE (52%)

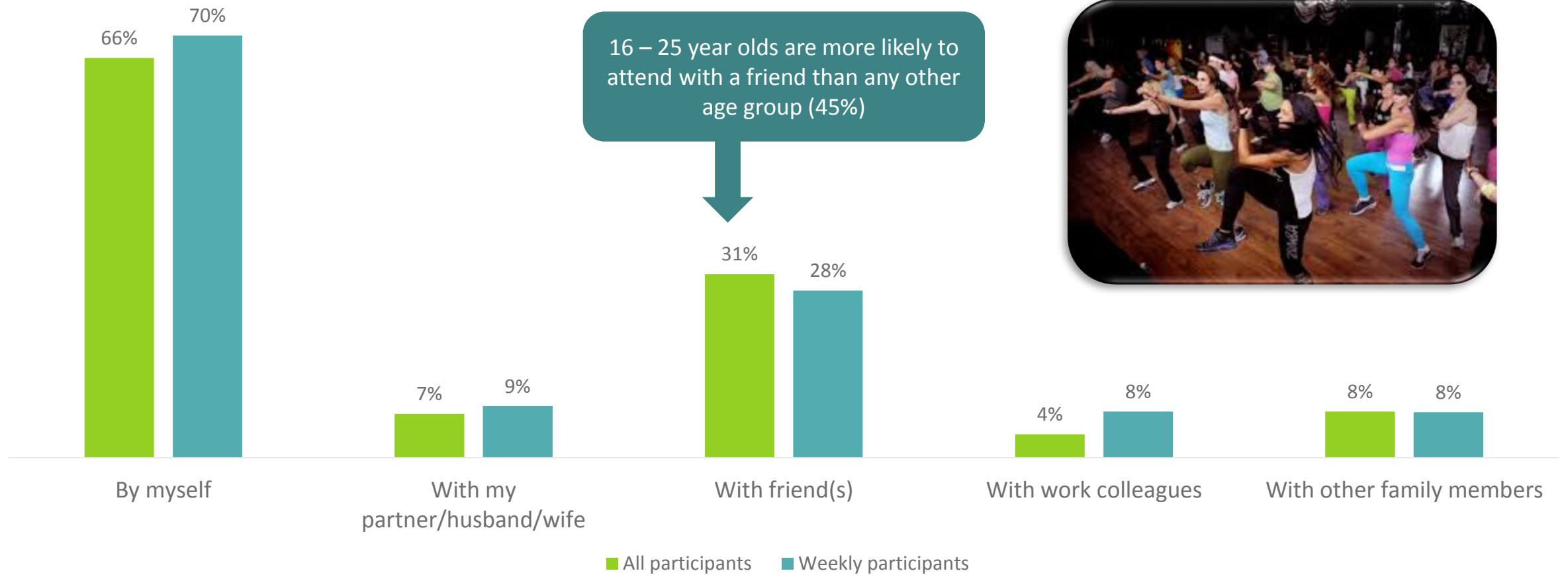


3 in 10 women attend group exercise classes with a friend

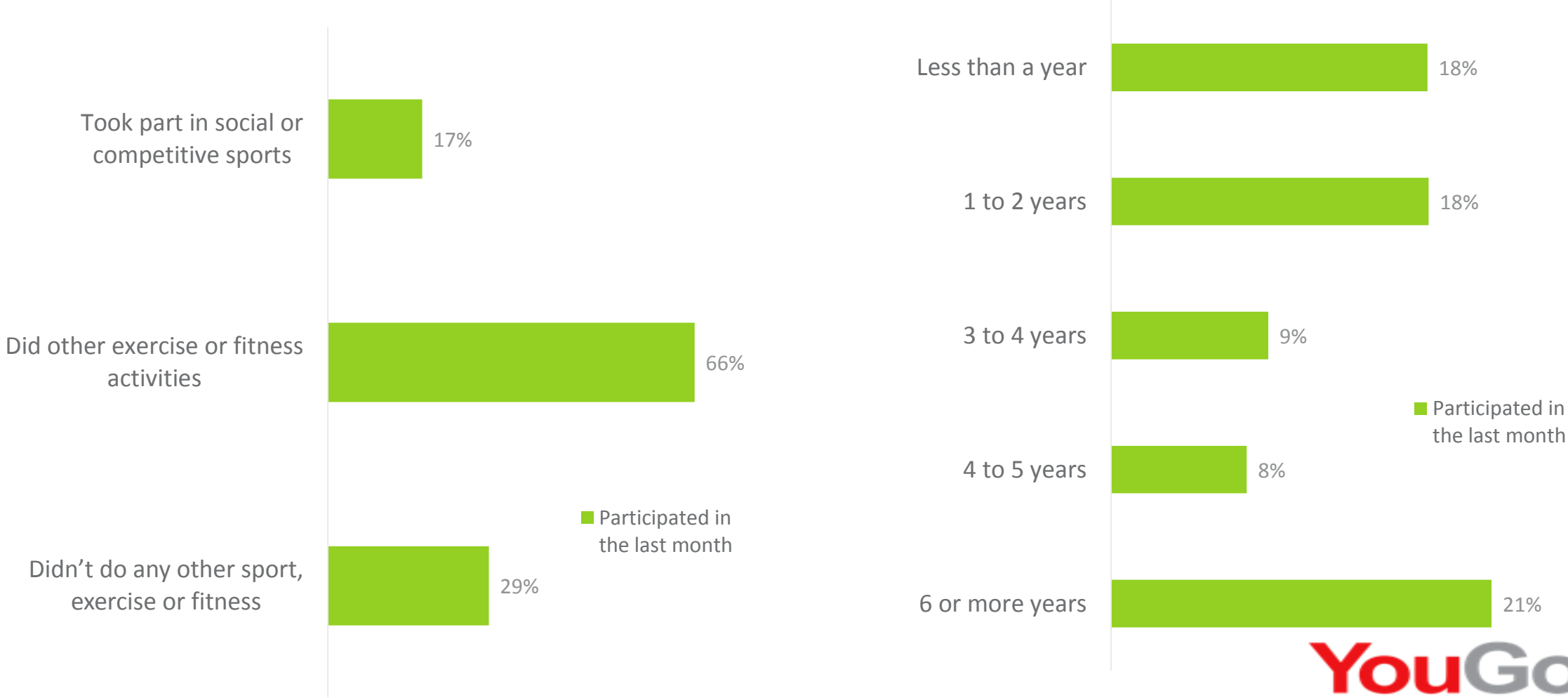
Women only



Those living in the town and fringe areas (72%) are more likely to attend group exercise classes by themselves than those living in urban (66%) or rural areas (65%)



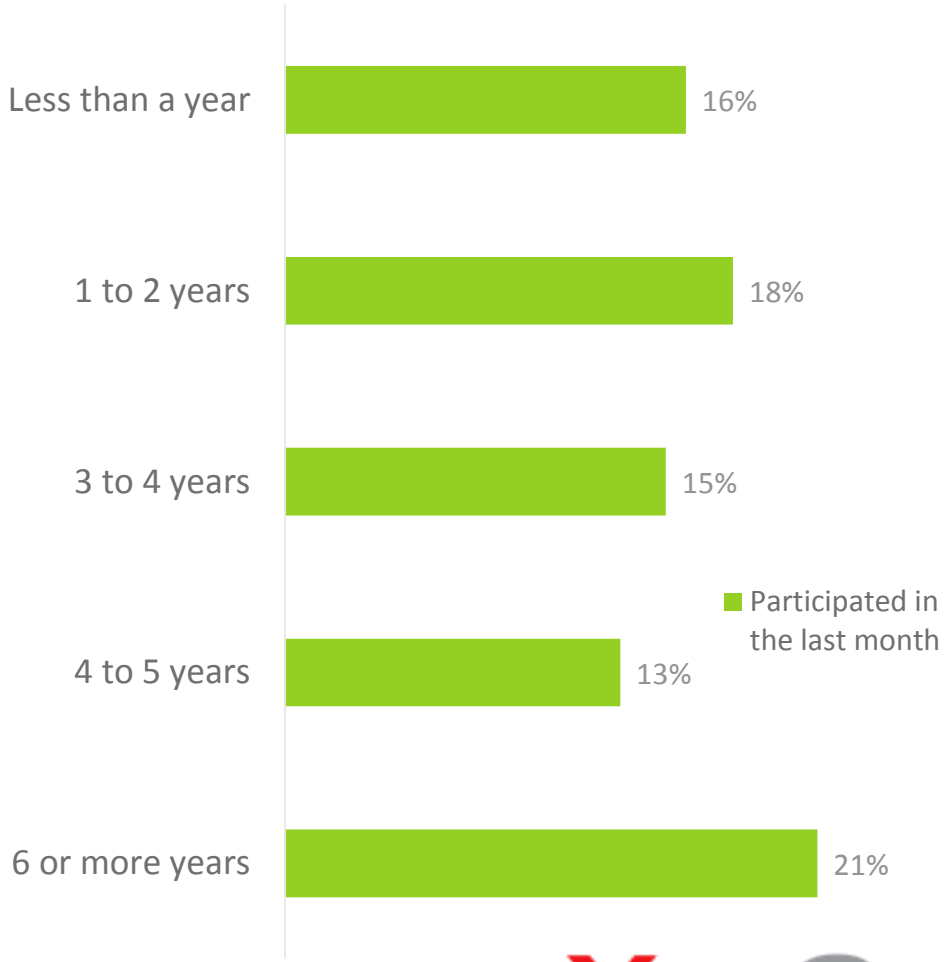
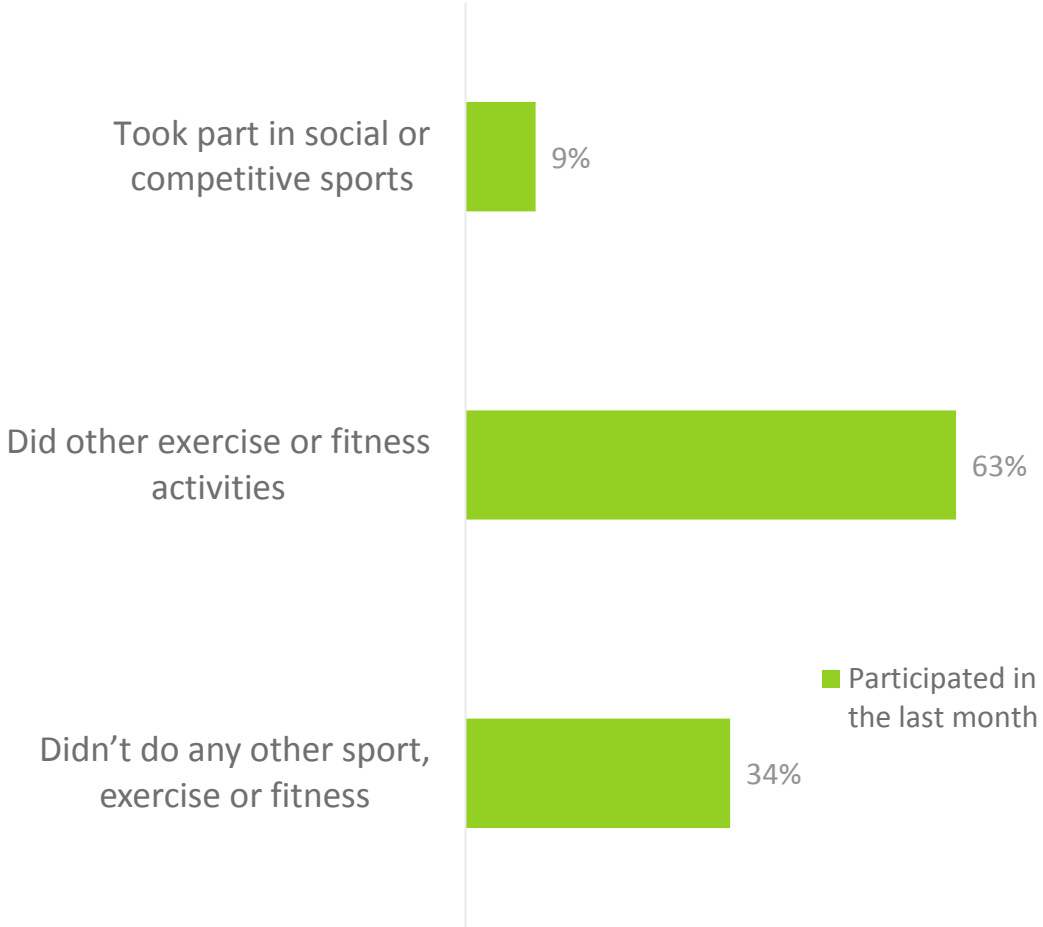
A third who weekly attend group exercise classes were not doing any exercise before



29 q5c_rc. 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: 398)
 q5d. For how long before taking group exercise classes were you not doing any other sport, exercise or fitness? (Base: all who were not doing any other sport 130)

A third of women attending monthly group exercise were not doing any form of exercise before

Women
(Nat Rep)



30 q5c_rc. 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 365)
 q5d. For how long before taking group exercise classes were you not doing any other sport, exercise or fitness? (Base: all who were not doing any other sport 123)

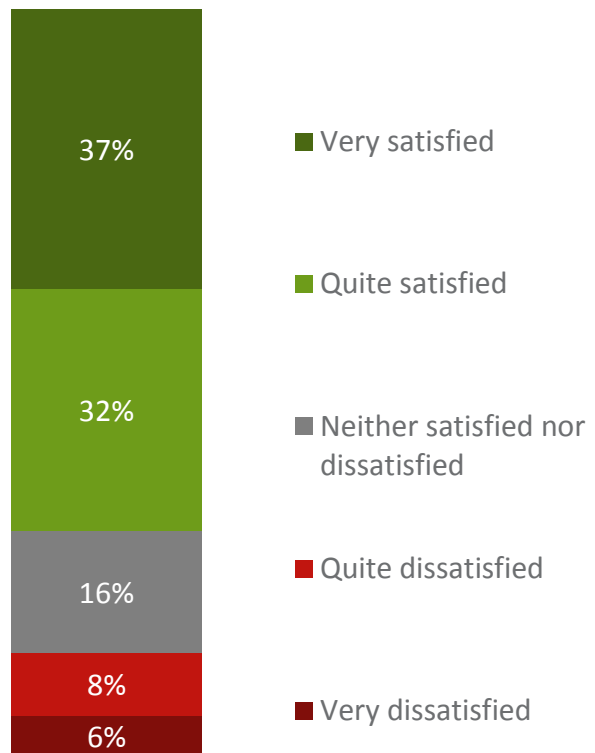
Satisfaction and interest



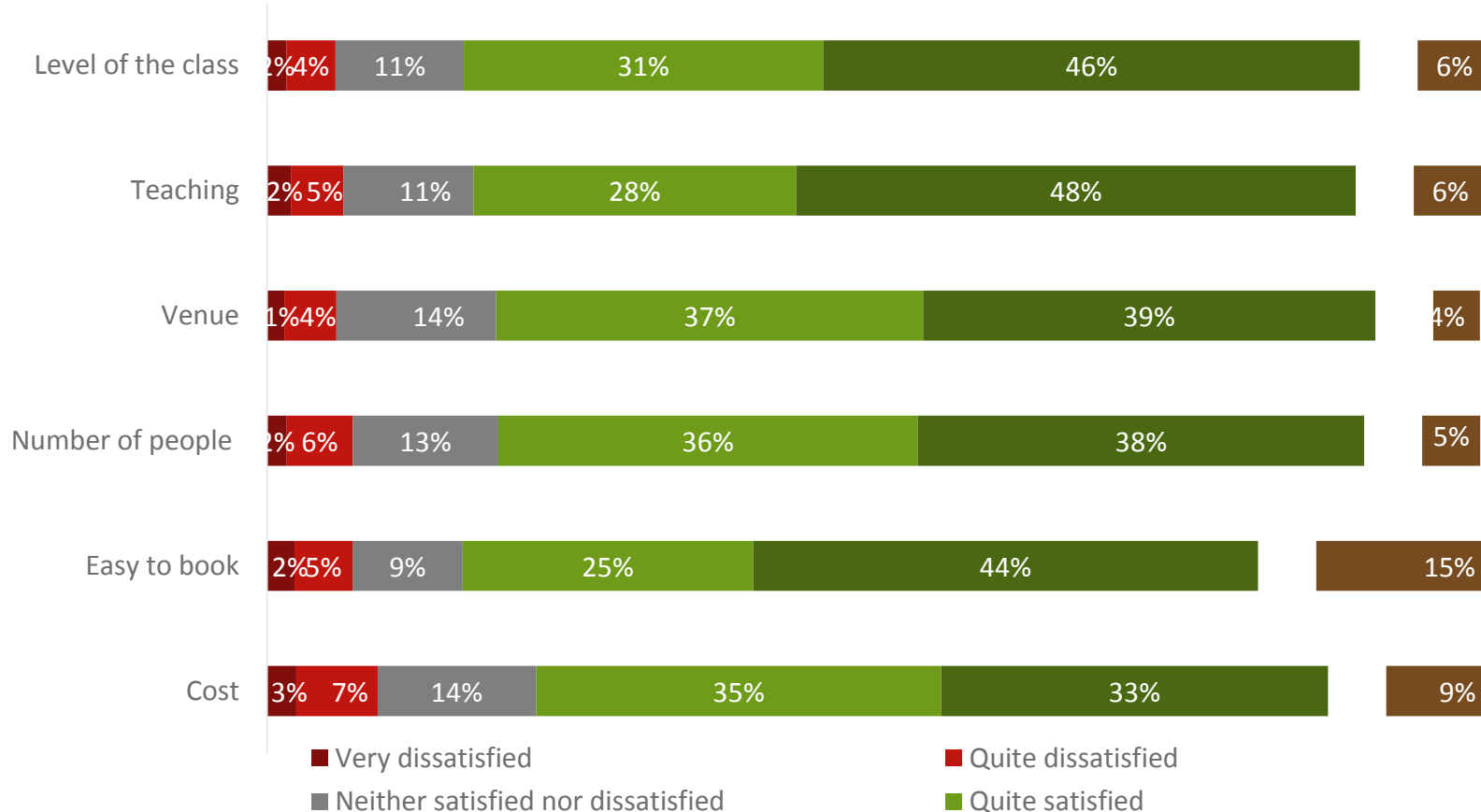


Overall, satisfaction is high on different aspects of group exercise classes, while satisfaction for cost could be improved

Overall satisfaction



Satisfaction with different aspects of dance fitness class



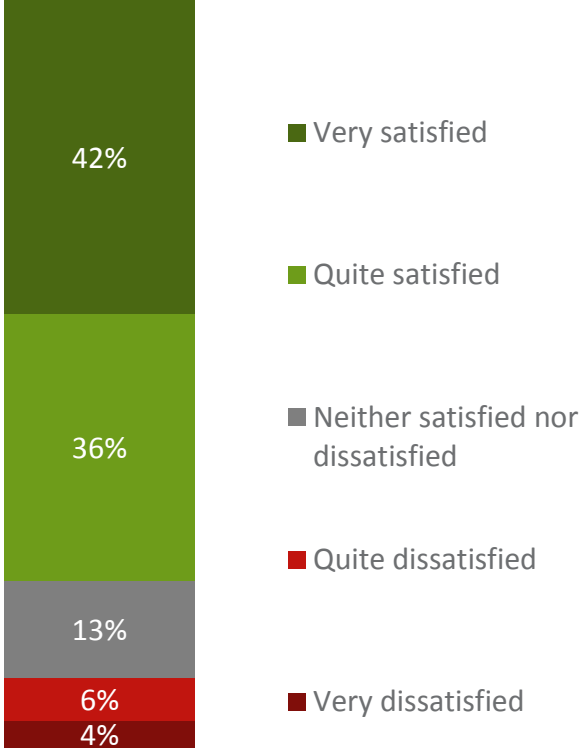
Q25_1 - q25_6. Thinking about the most recent group exercise class you did how satisfied or dissatisfied were you with the following aspects?
 q28. And overall how satisfied or dissatisfied were you with the most recent group exercise class you took part in? (Base: participated in the last 12 months 562)

Level of the class and teaching has the highest level of satisfaction, while satisfaction for cost could be improved

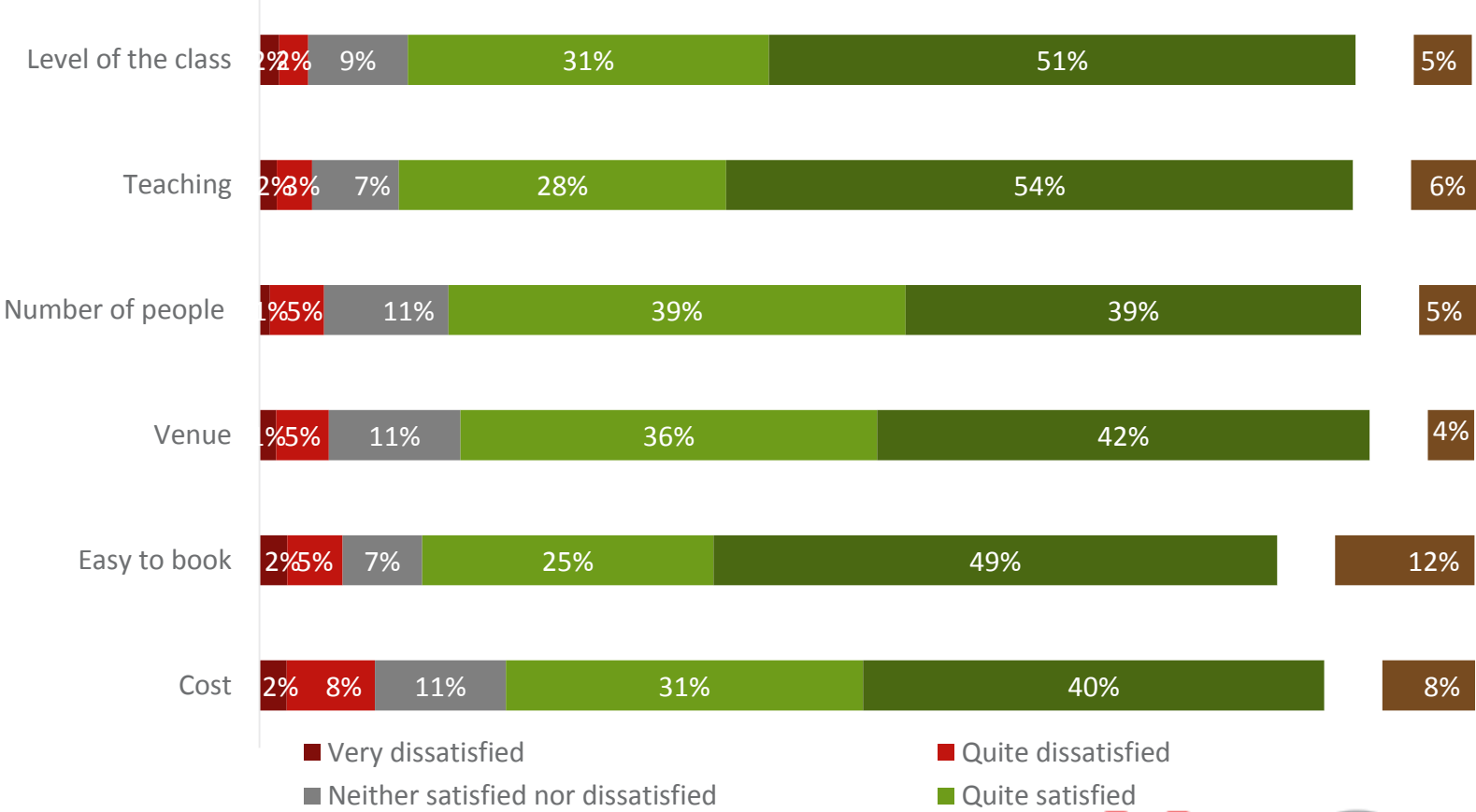
Women only



Overall satisfaction



Satisfaction with different aspects of dance fitness class



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 515)



Latent demand



Holistic exercise is the most popular form of group exercise for women who are interested but not yet participating

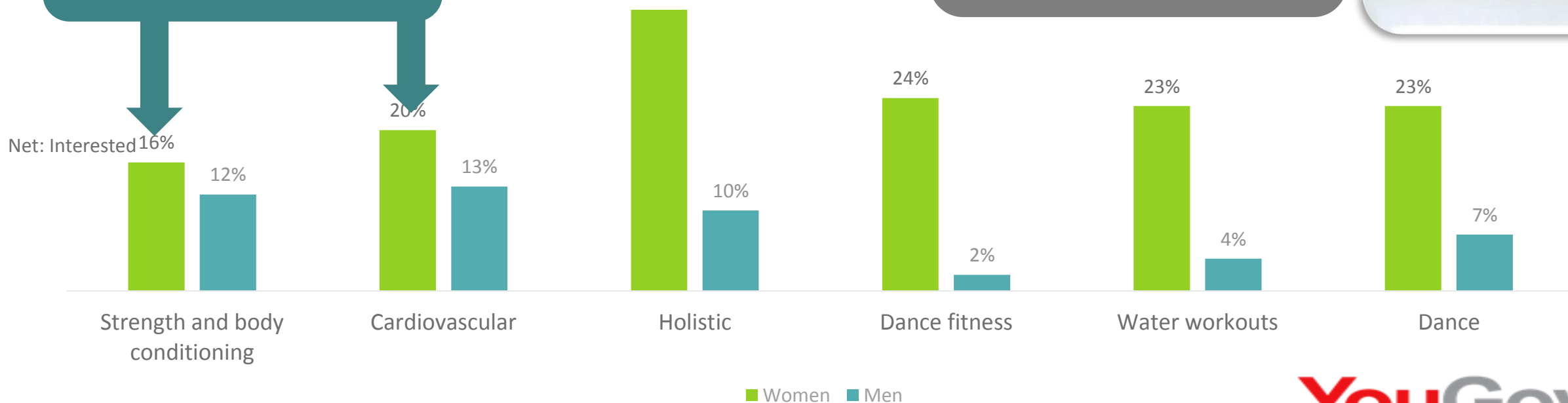
Men & Women (Nat Rep)



Those who are most interested in holistic group exercise are those aged 26 – 44 years (41%)

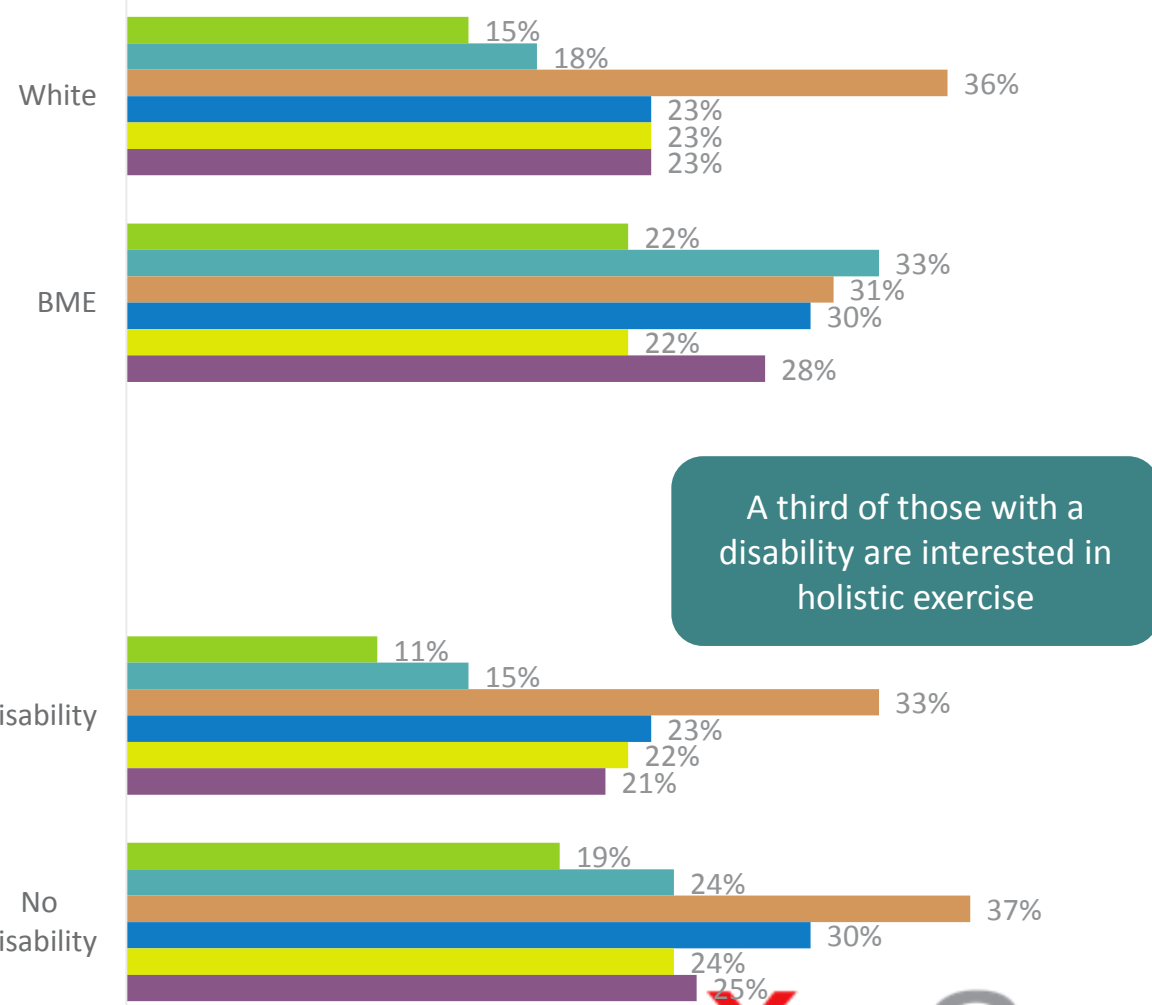
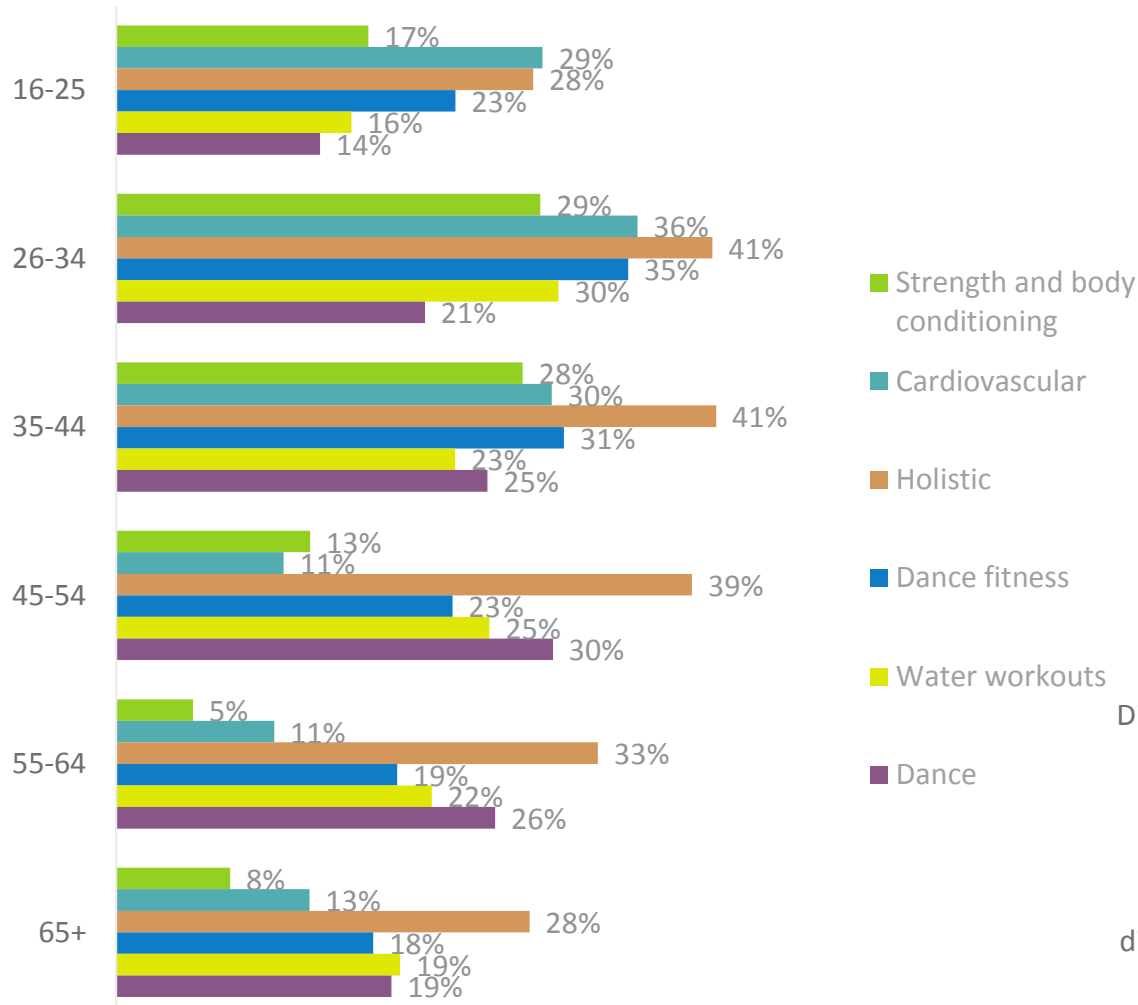
A fifth of BMEs (22%) are interested in strength and body conditioning and a third (33%) are interested in cardiovascular

Men do not have a strong level of interest in group exercise as women, although some level of interest is in cardiovascular, strength and body conditioning



Interest for holistic style exercise is prominent across a majority of the age groups

Women (Nat Rep)



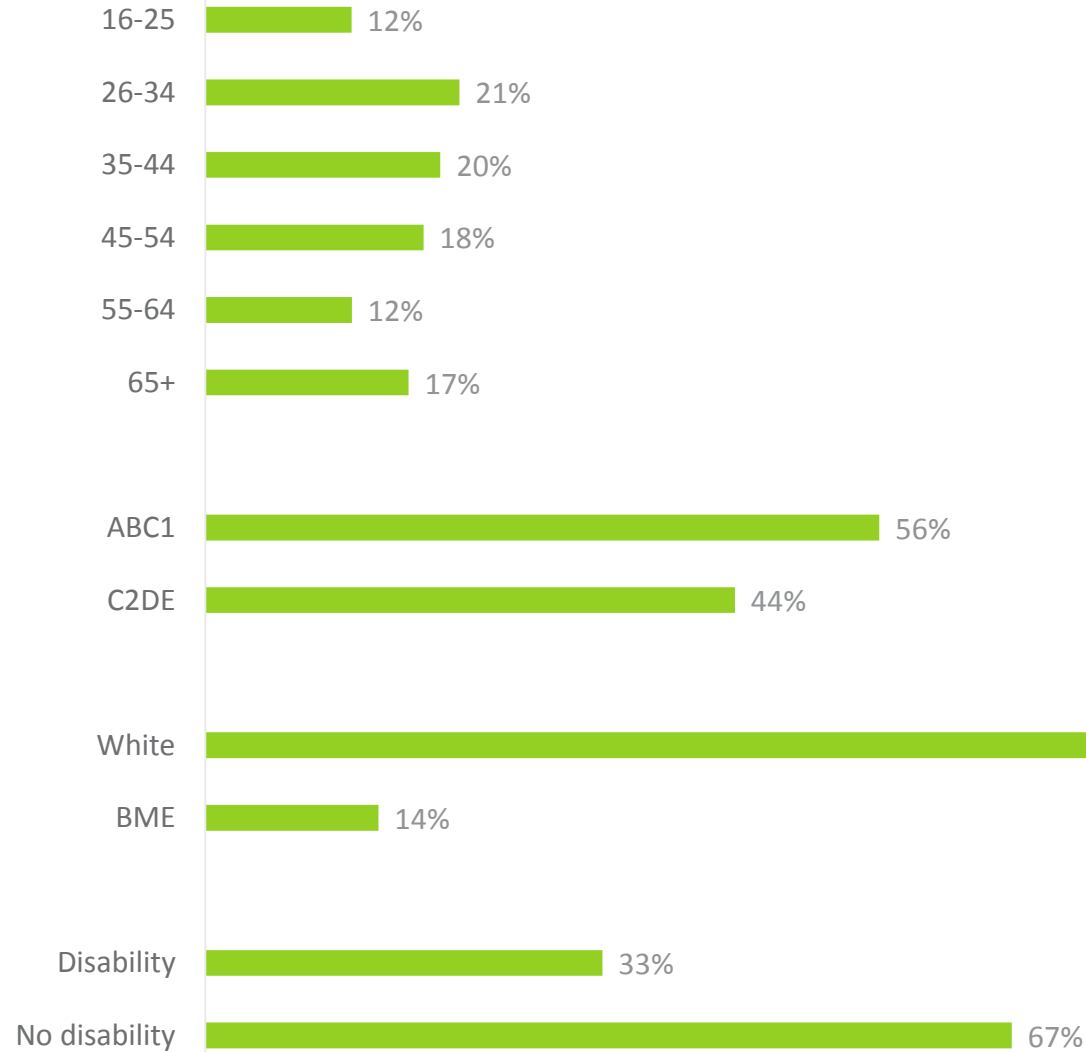
A third of those with a disability are interested in holistic exercise

Net: Interested



All who are interested in group exercise

Women (Nat Rep)



Just under a fifth of those over 65 years are interested in group exercise

Opportunity

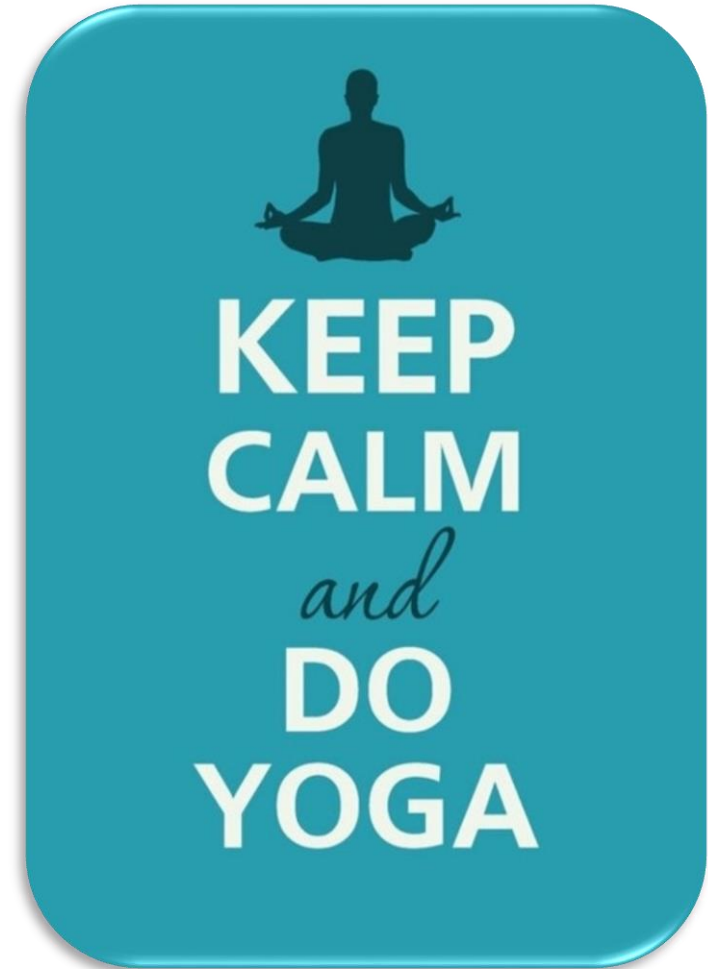
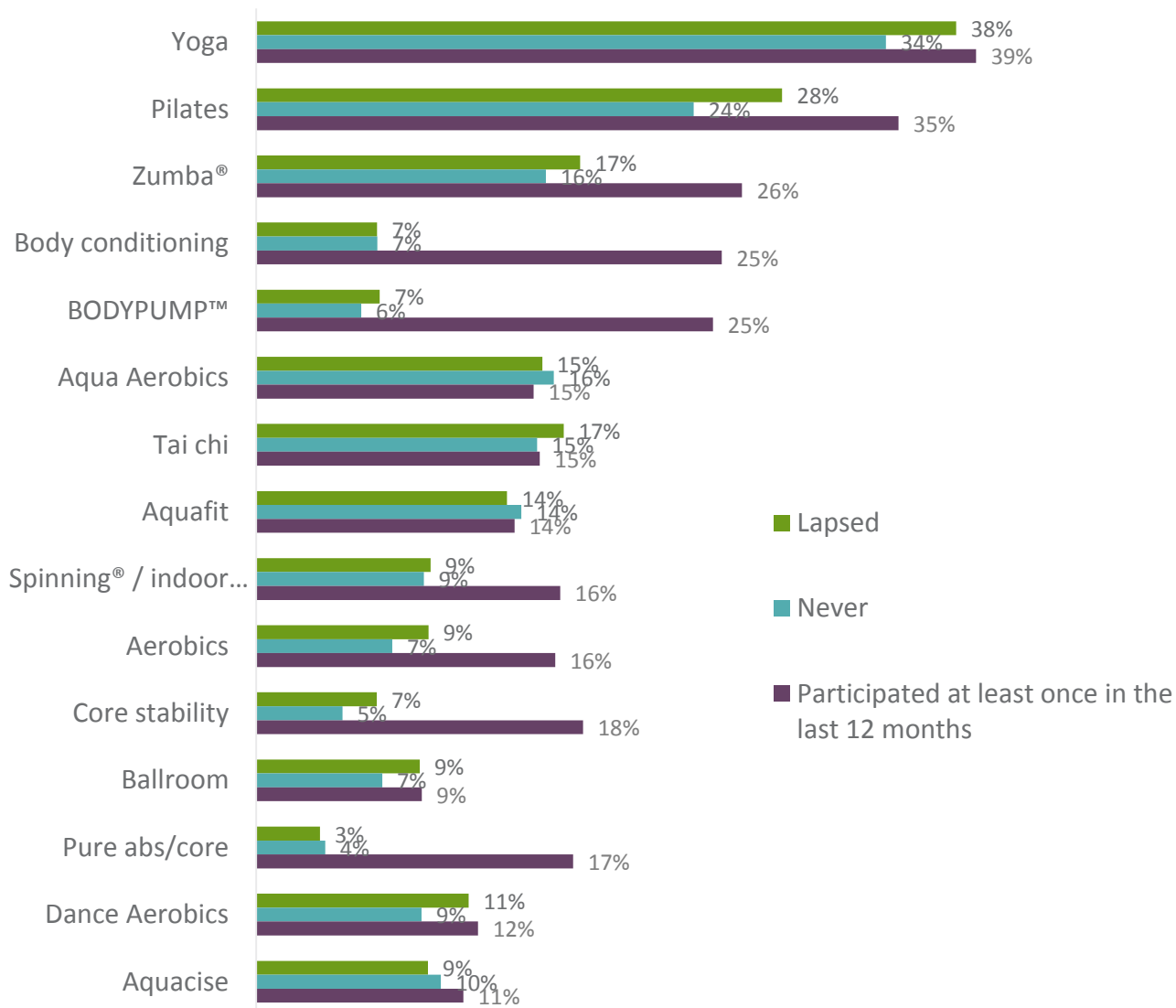
A third of people with a disability are interested in participating in group exercise classes

YouGov



Interest is highest for yoga, pilates and zumba

Women (Nat Rep)

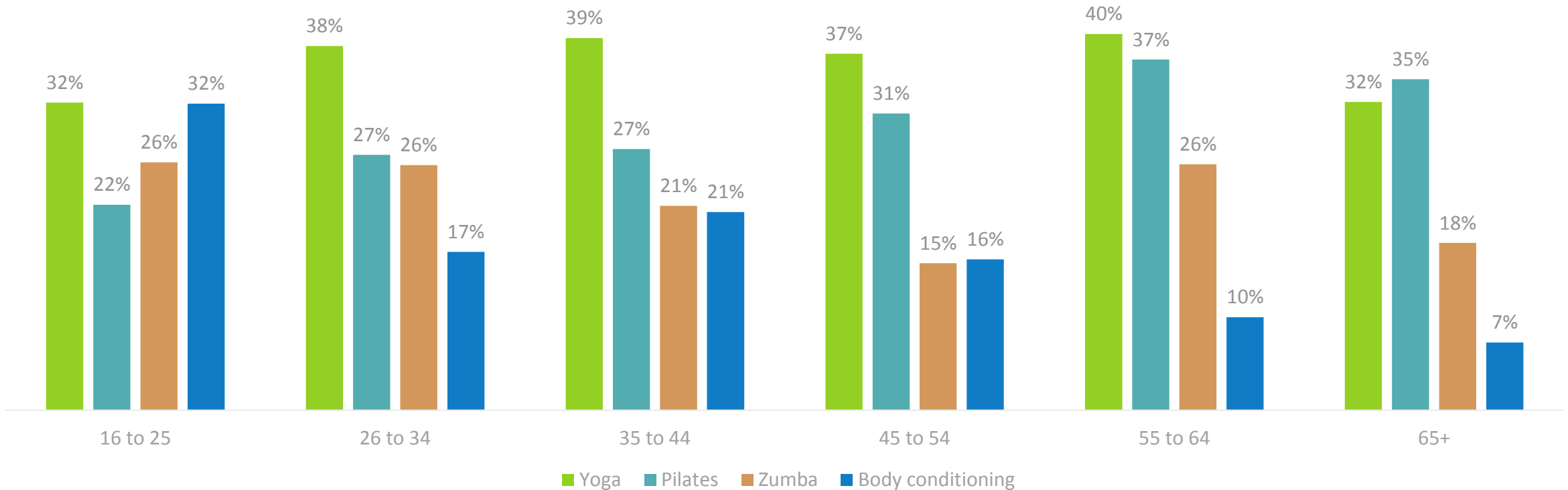


YouGov

Only showing above 10%

Yoga has high popularity across all age groups, while 16-25s have a higher interest in body conditioning than any other age group

Women (Nat Rep)

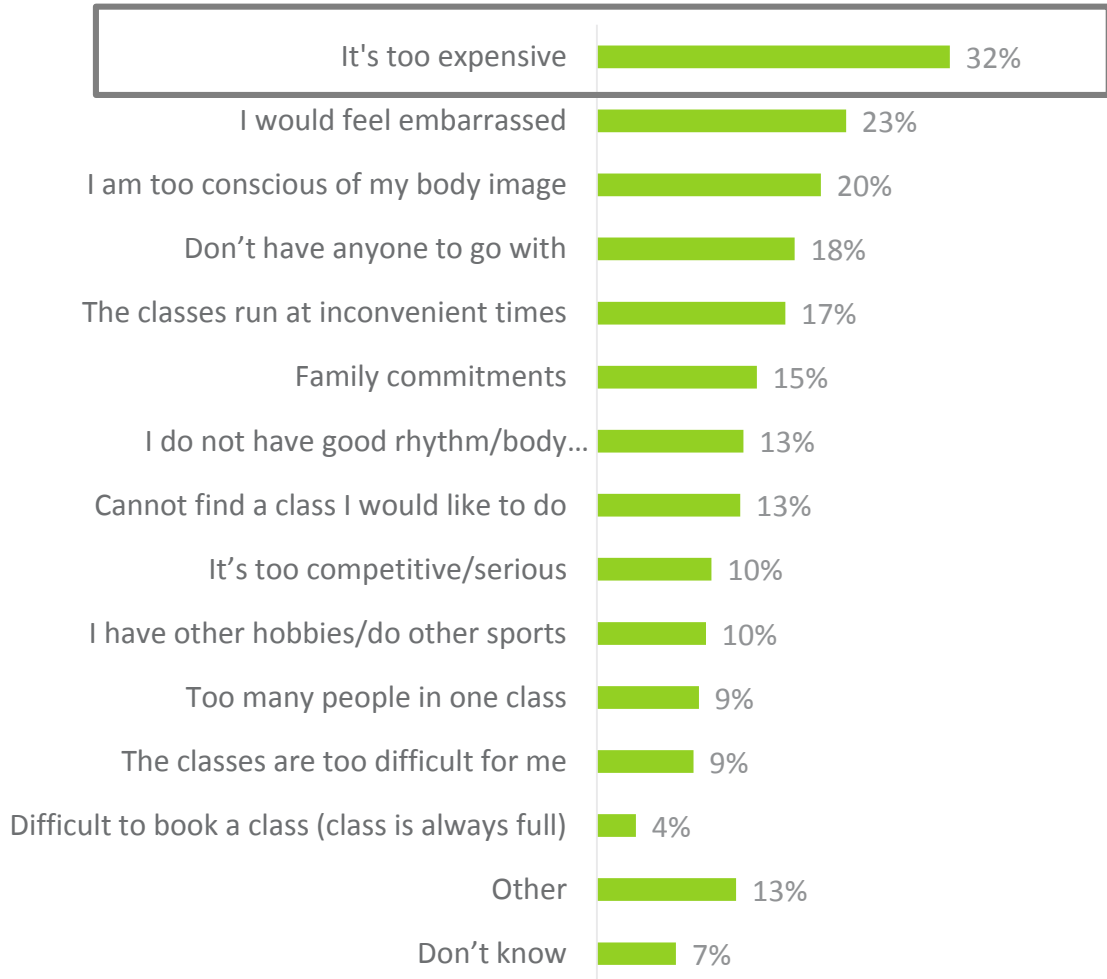


Challenging perceptions on cost would help increase participation, along with emphasising the health benefits

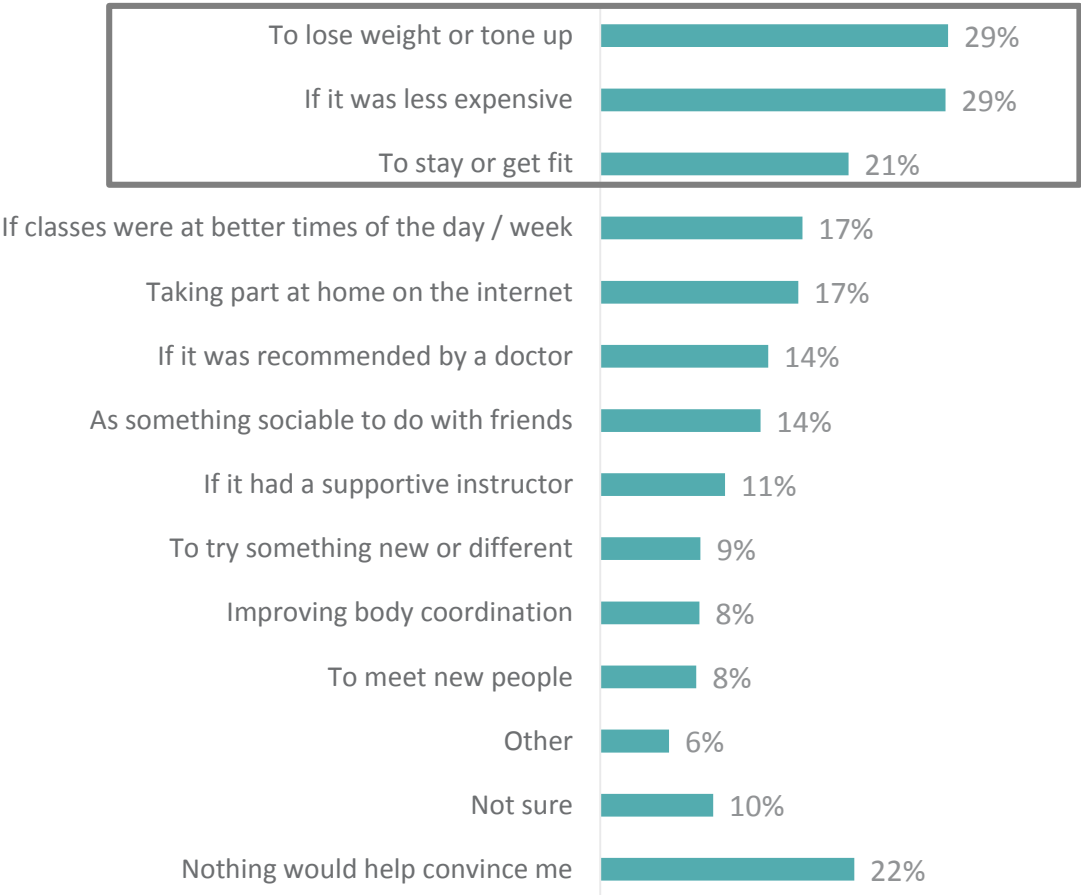
Women (Nat Rep)



Barriers to attending group exercise classes



Encouraging attendance to group exercise classes



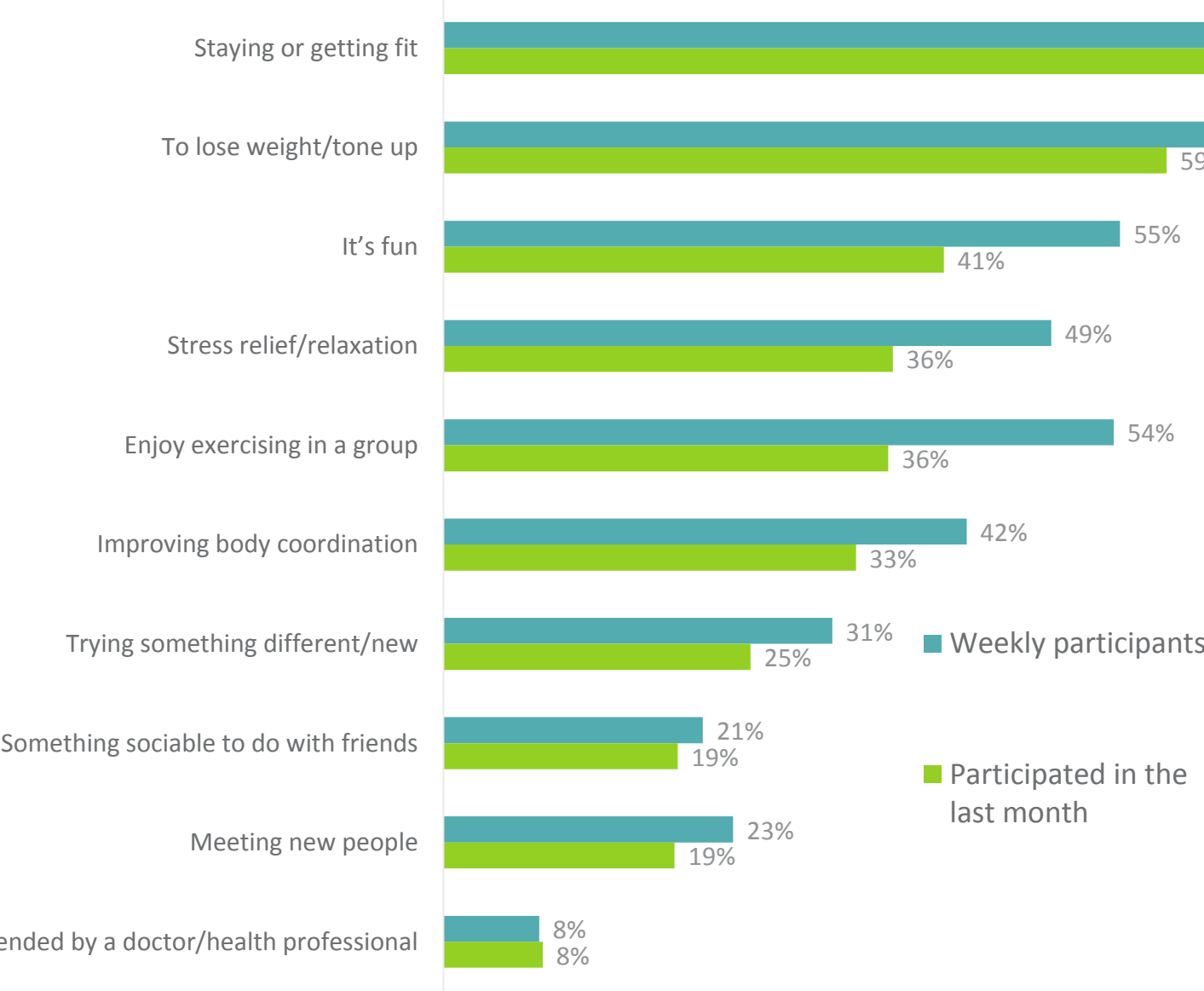
Only showing above 10%



Motivators, barriers and other attitudes

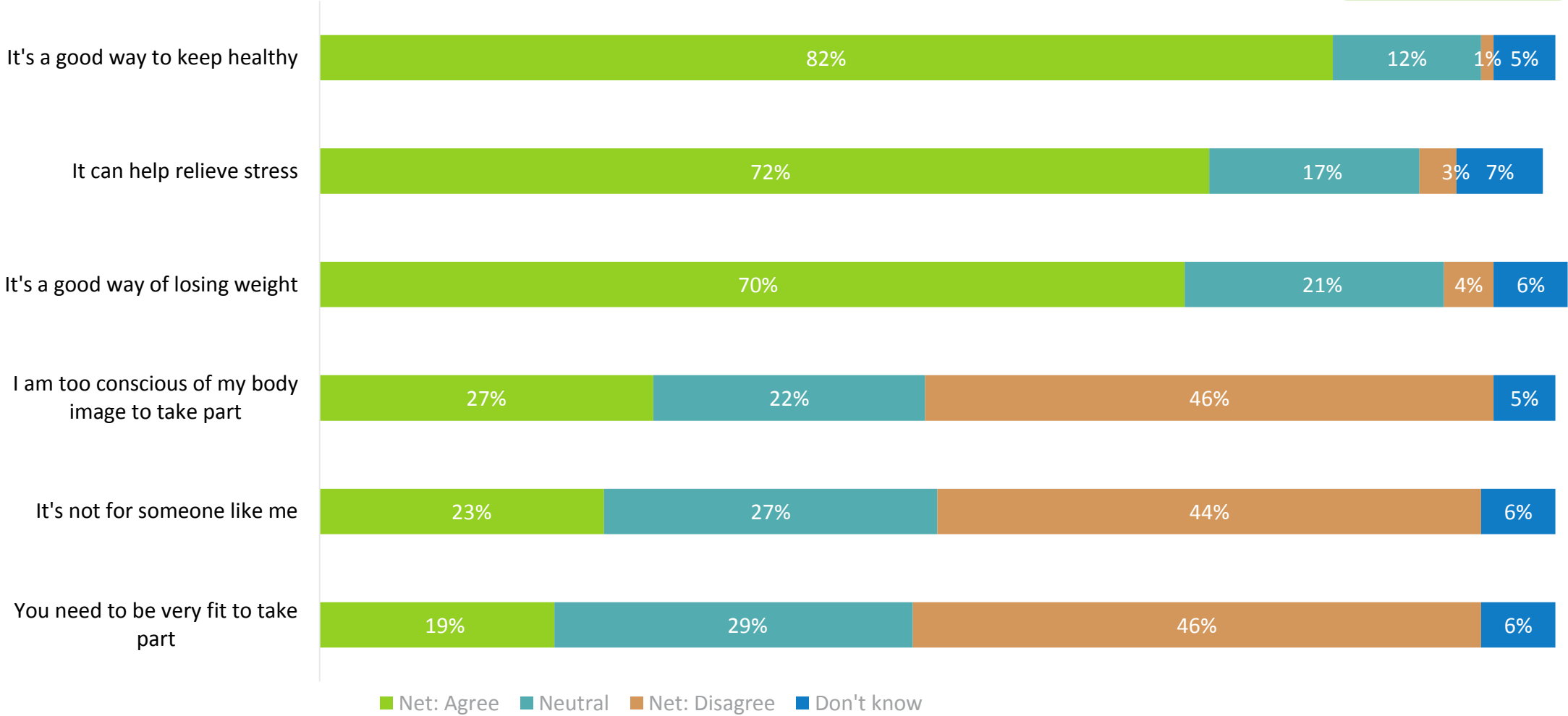


Health benefits and enjoyment are the top reasons why people attended group exercise classes



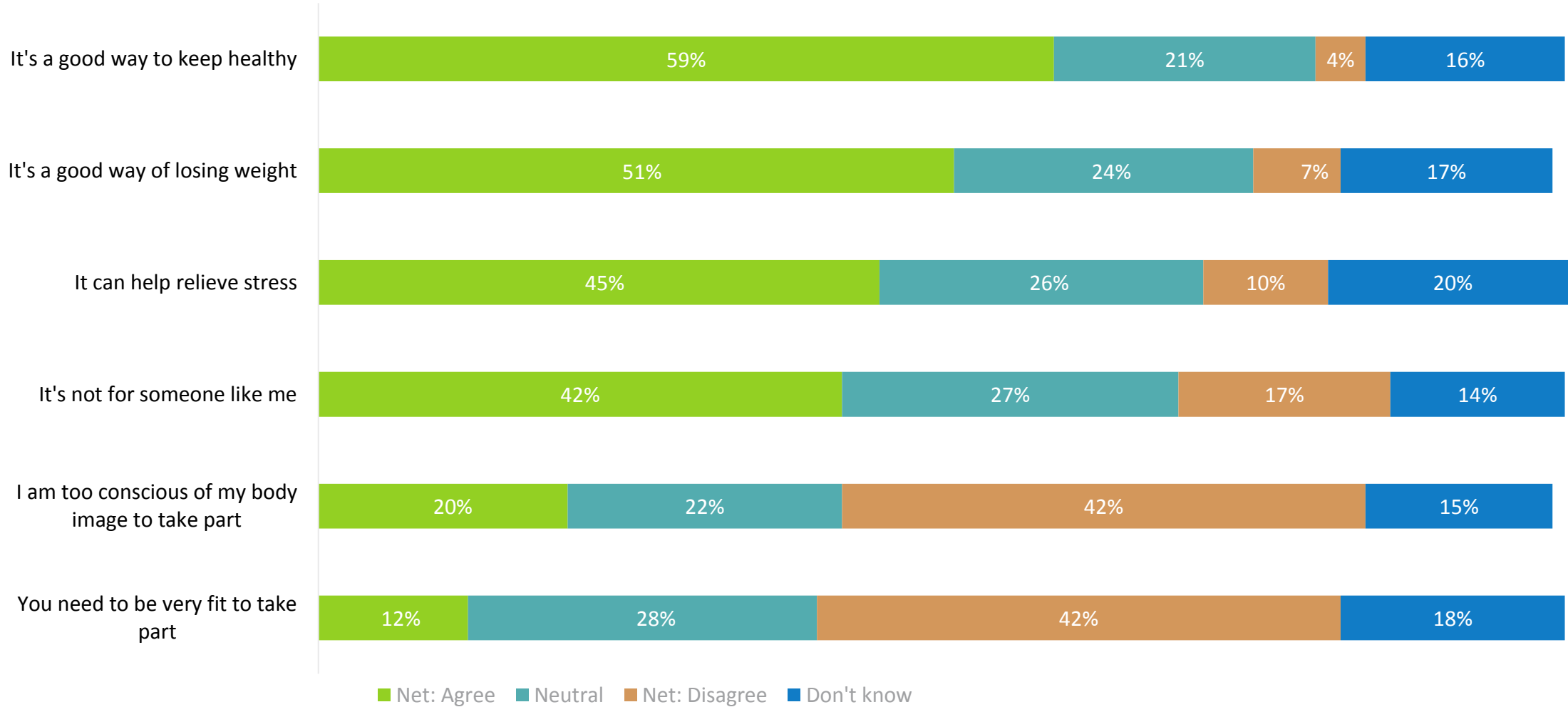
Health and exercise related attitudes

Women (Nat Rep)



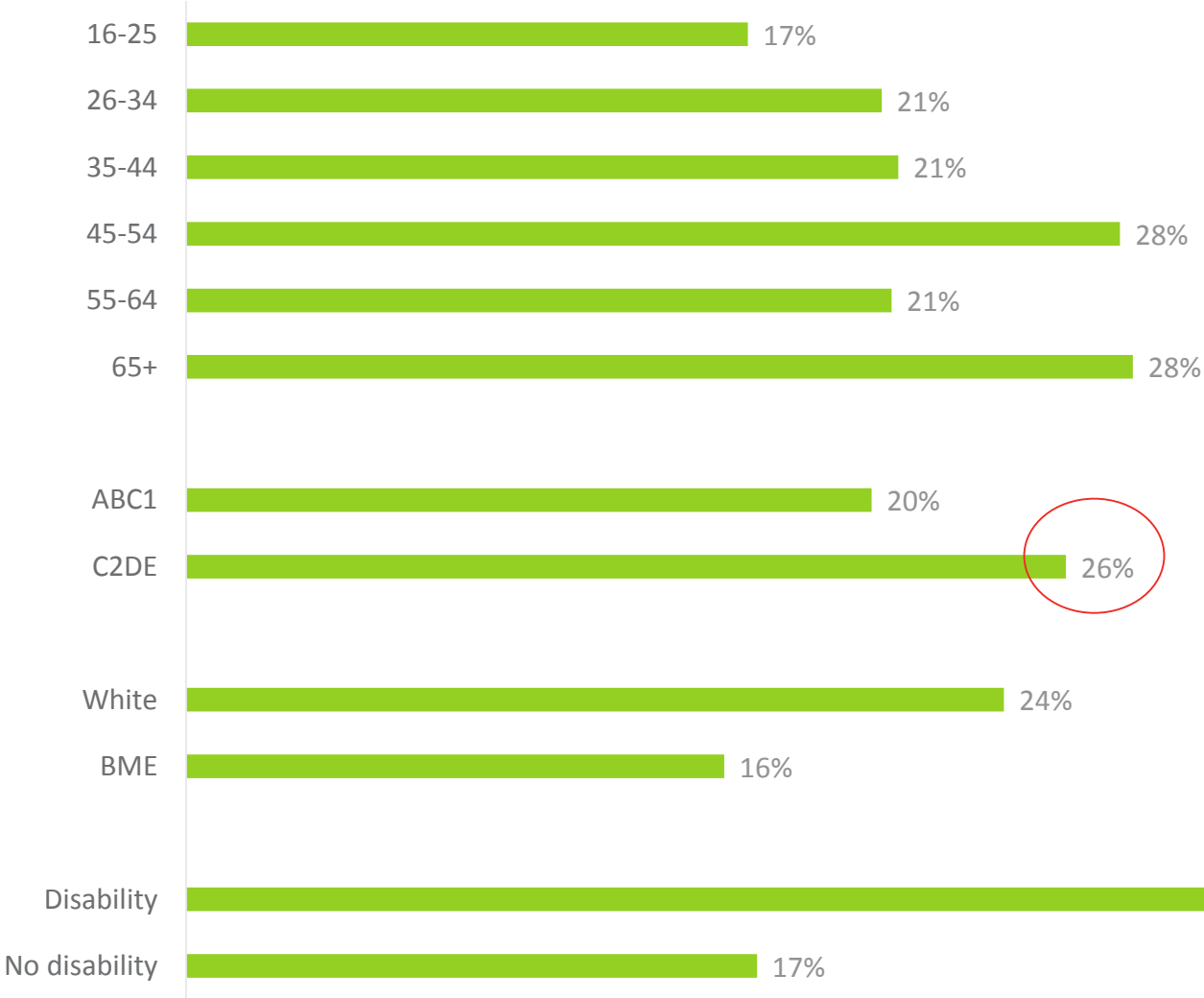
Health and exercise related attitudes

Men
Nat Rep



Spotlight on: Not for someone like me

Women (Nat Rep)

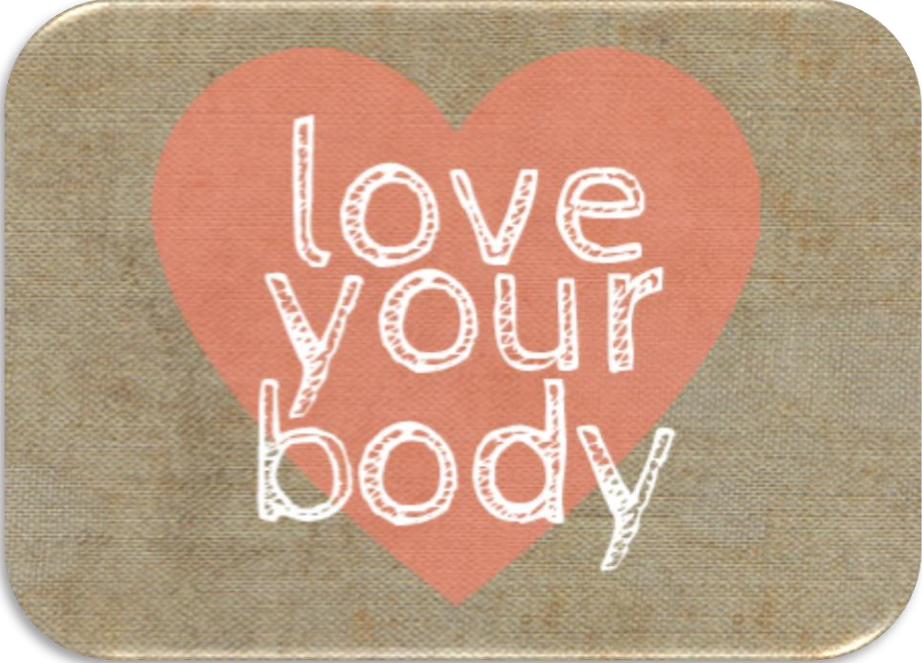
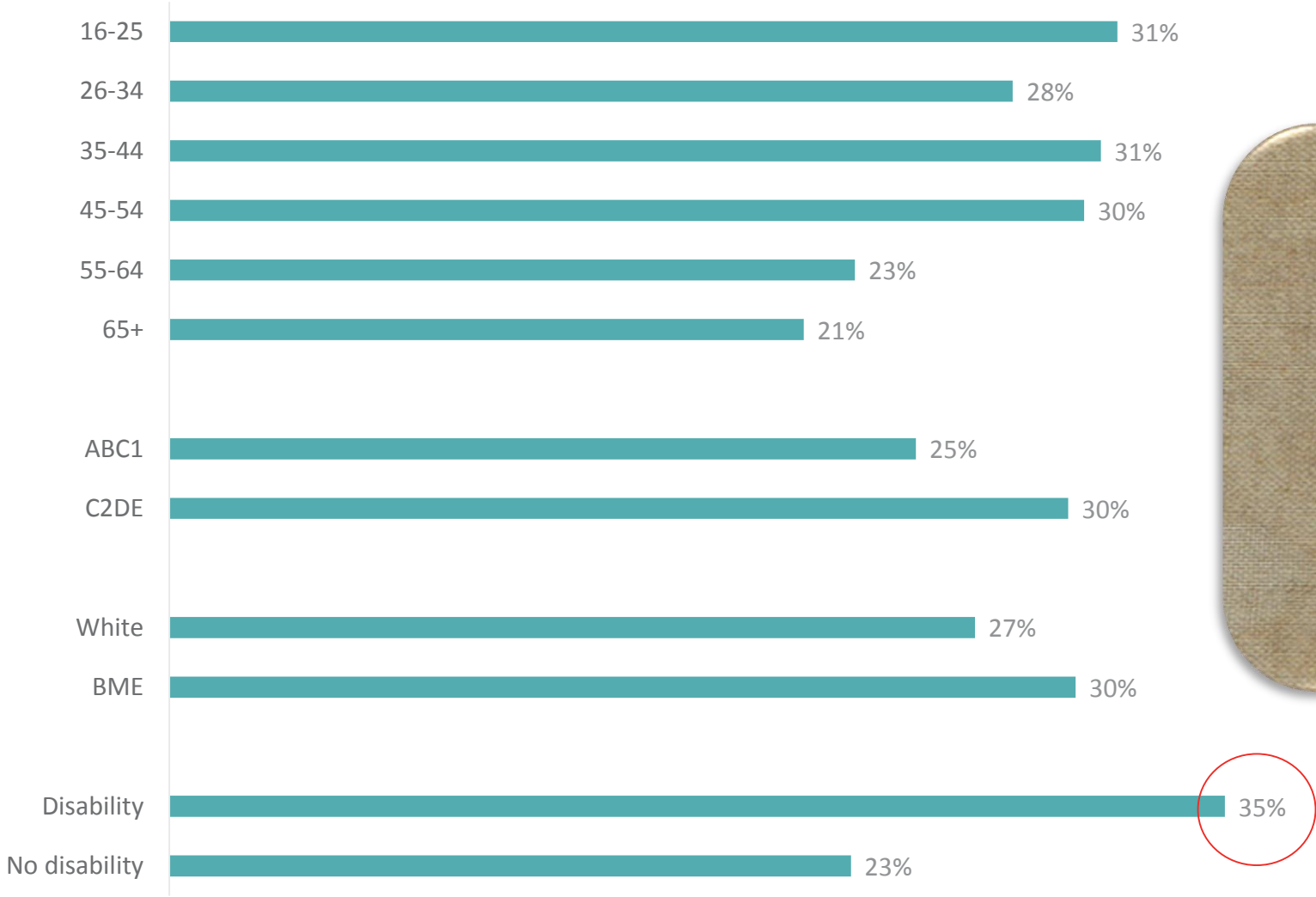


Challenging the perception amongst those with a disability may help to increase group participation



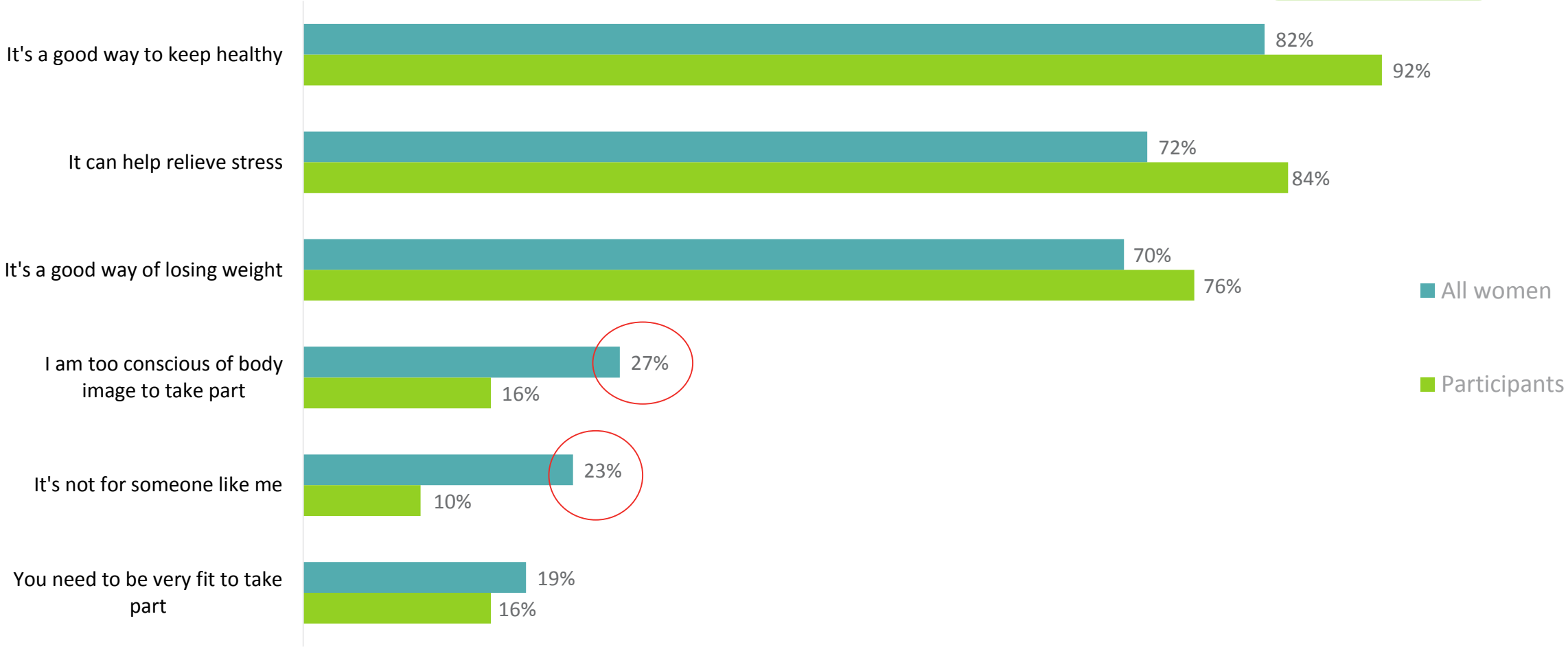
Spotlight on: Too conscious of body image

Women (Nat Rep)



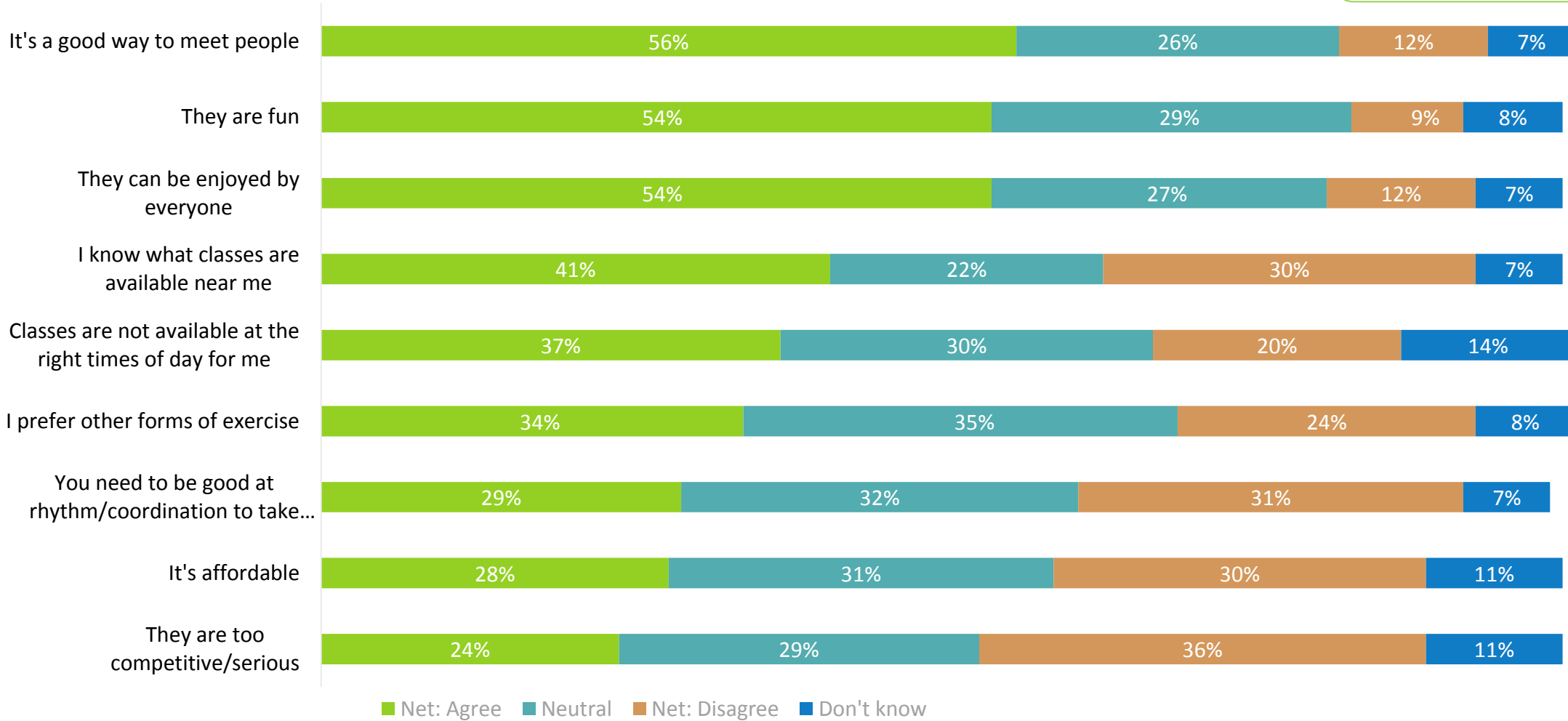
Gap analysis: Health and exercise related attitudes

Women (Nat Rep)



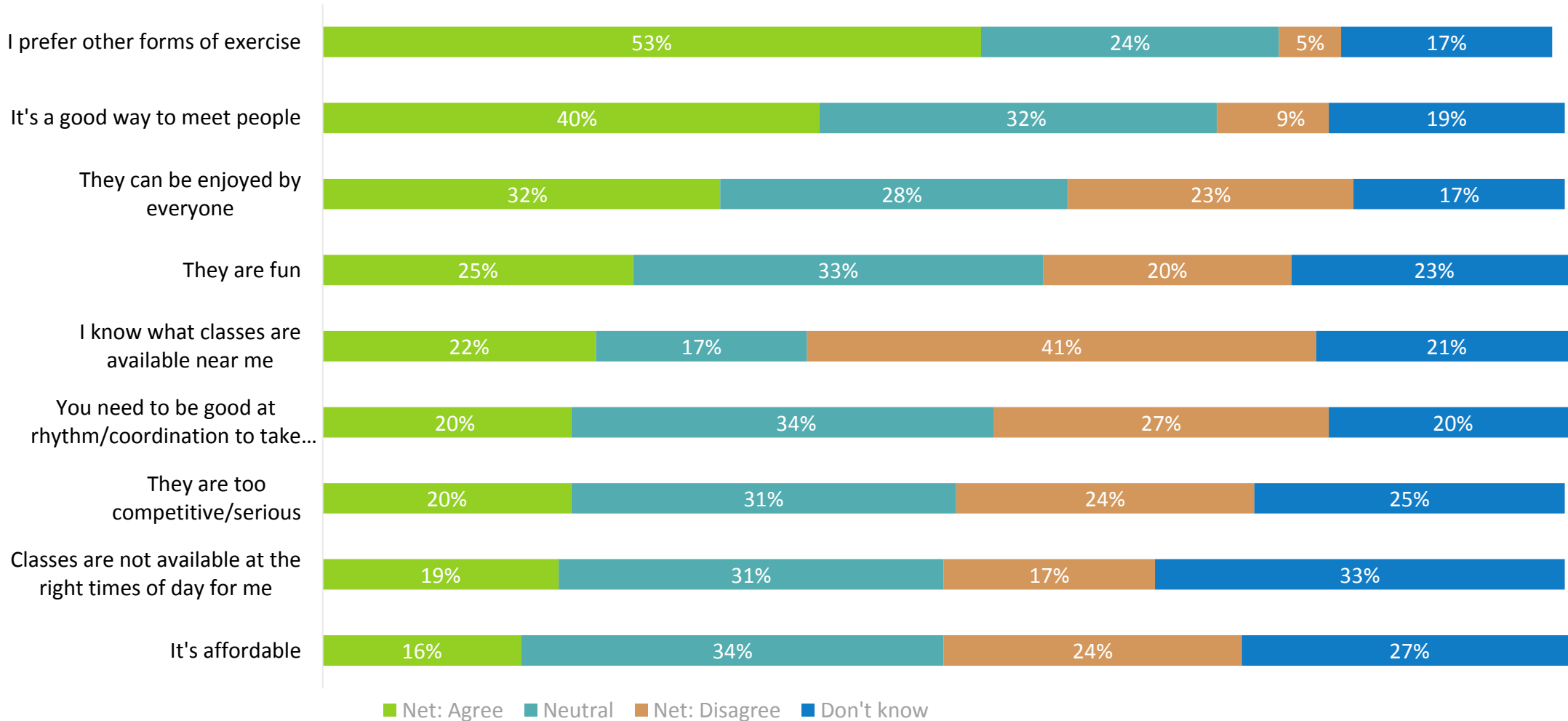
Attitudes towards group exercise

Women (Nat Rep)



Attitudes towards group exercise

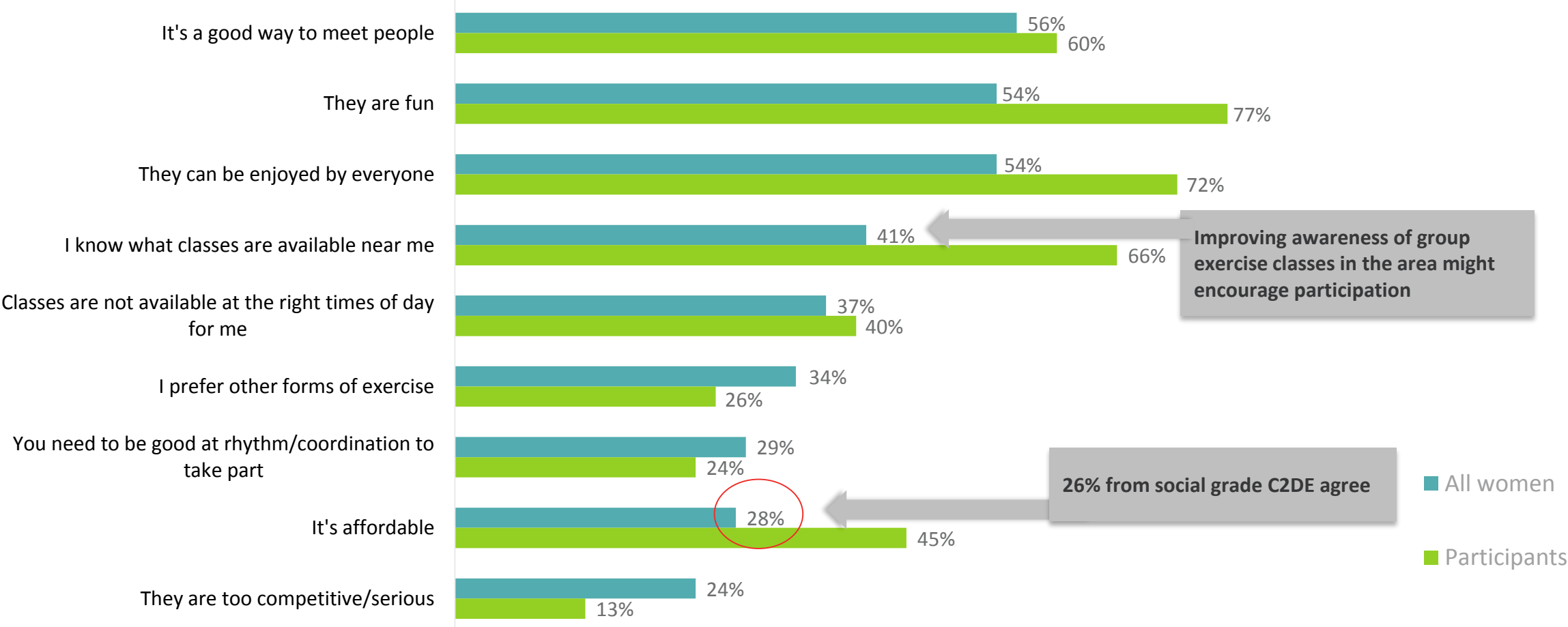
Men
Nat Rep



YouGov

Gap analysis: Attitudes towards dance fitness: dance and other aspects

Women (Nat Rep)



General participation in sports

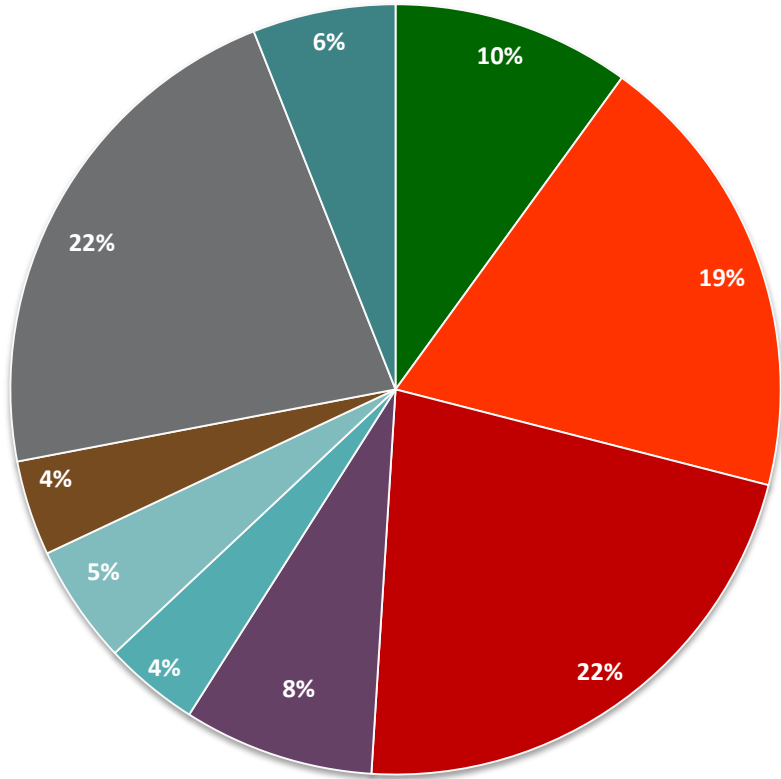


52% of women do some physical activity at least once a week, while 22% have done nothing in the last year



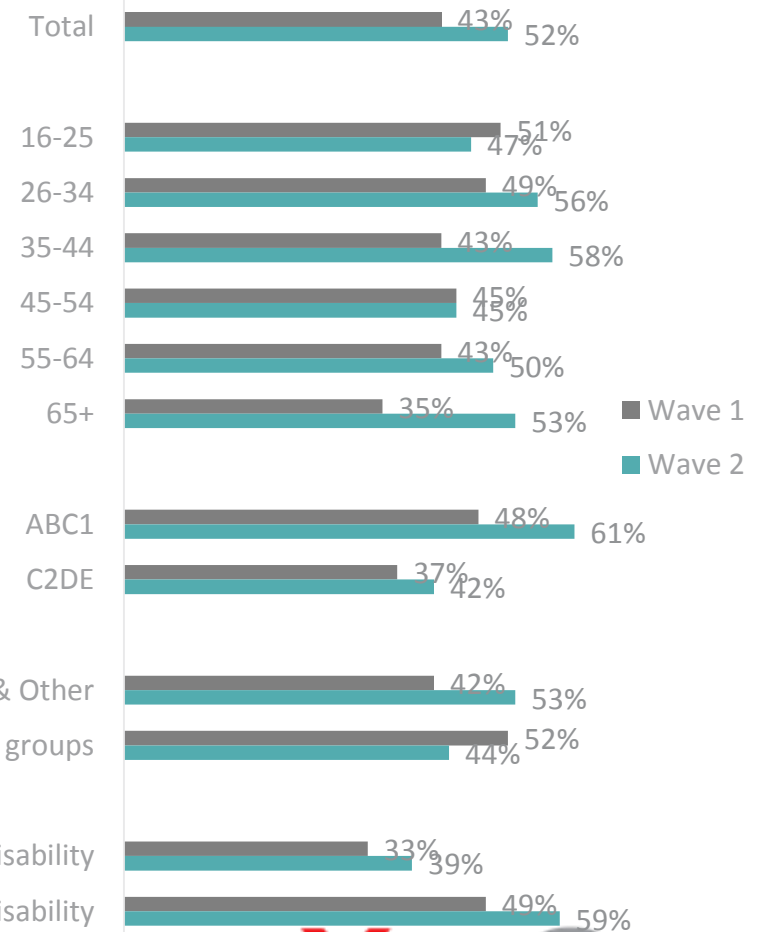
Women (Nat Rep)

Wave 2 only



There has been an increase amongst the demographics of those participating in exercise more than once a week, notably in the over 65 years, and ABC1s

Once a week or more often



- Five times a week or more
- Once to twice a week
- Once a month
- Once or twice during the year
- Three or four times a week
- Two or three times a month
- Once every two or three months
- Nothing in the last 12 months



Over a third of women have exercised between 1 – 3 days for 30 minutes or more

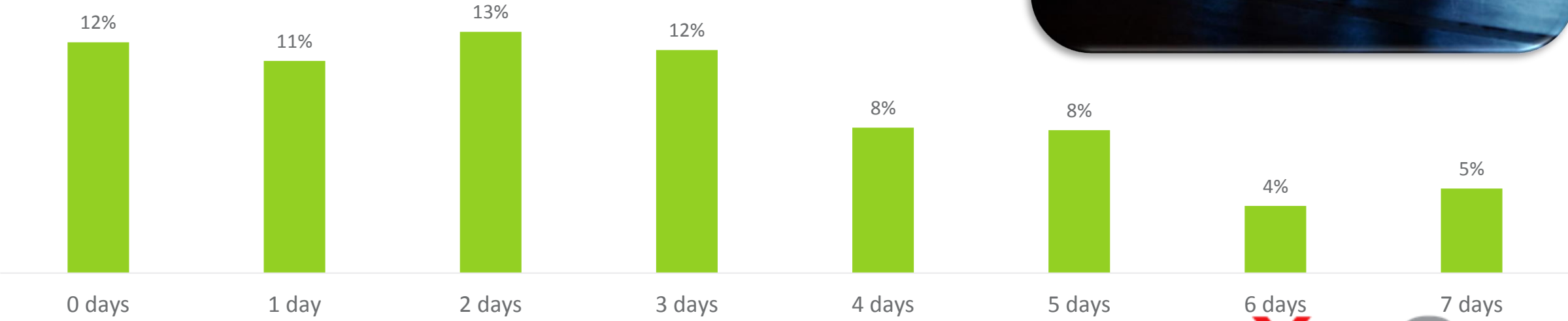
Women (Nat Rep)



Unsurprisingly, a higher proportion of women aged 26-34 years (43%) exercise between 1 – 3 days for 30 minutes or more than women aged 65+ (28%)

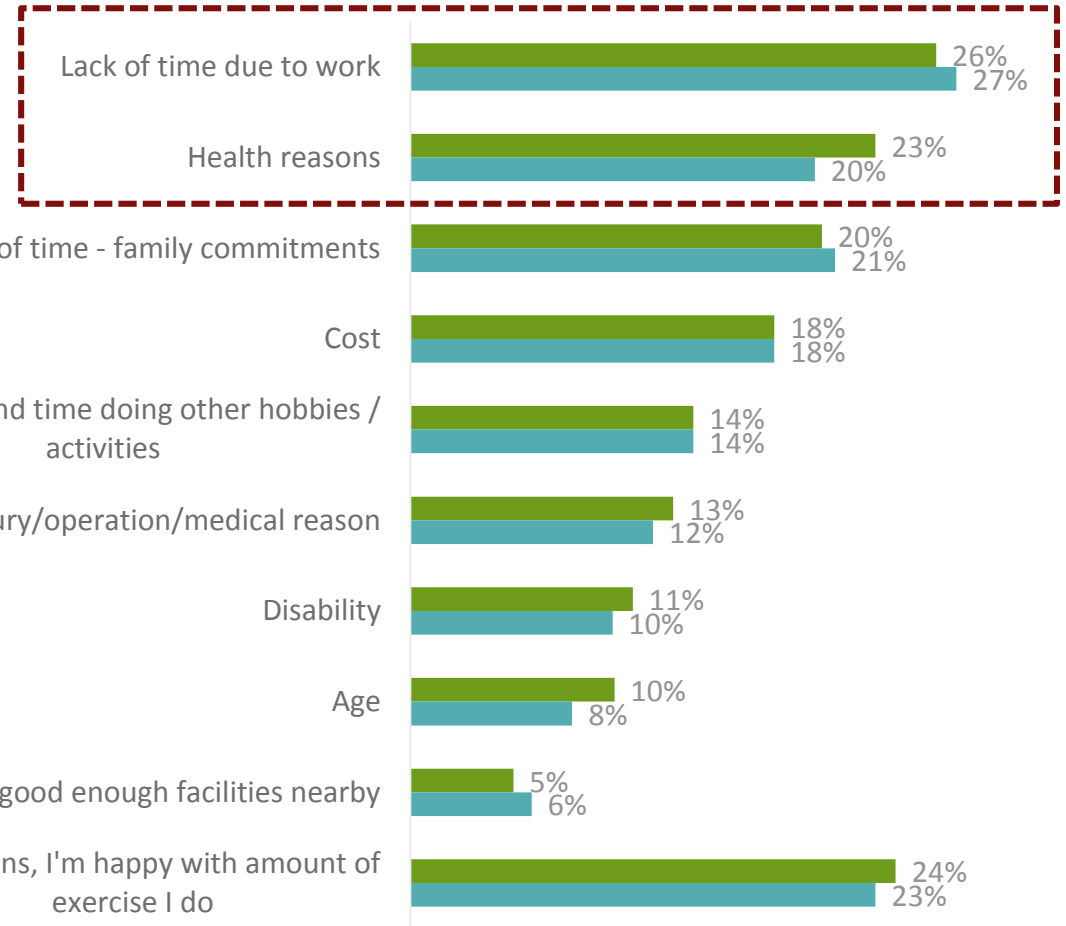
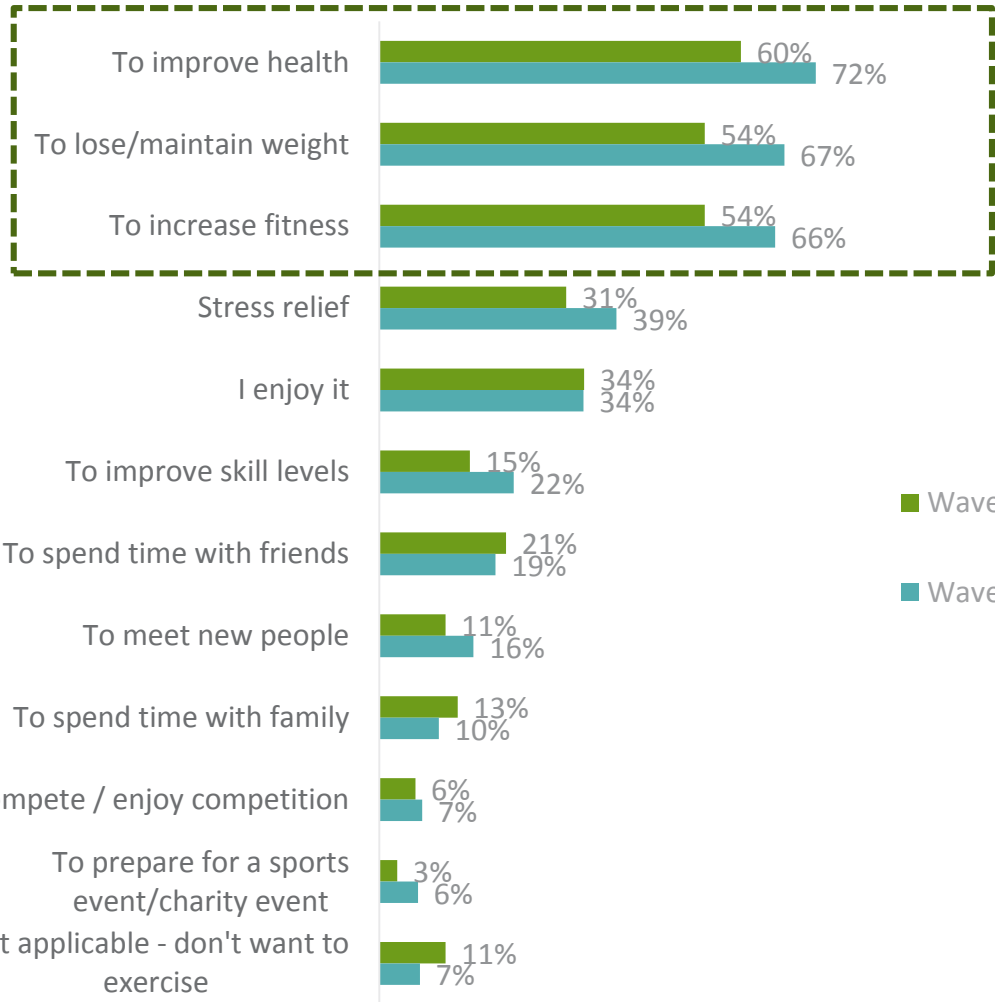


Number of days exercised in the past week



Improving general health are the main reasons women exercise whilst lack of time (work) is a top barrier

Women (Nat Rep)



Annex A

Sample Breakdown



Demographic breakdown

	Unweighted	Weighted	%
Men	249	713	17%
women	1219	755	83%
16 – 25	127	228	9%
26 – 34	269	203	18%
35 – 44	295	257	20%
45 – 54	284	269	19%
55 – 64	229	230	16%
65+	264	281	18%
ABC1	852	800	58%
C2DE	616	668	42%

	N	%
Boy	39	23%
Girl	129	77%
14 years	69	41%
15 years	99	59%