

WELCOME TO THE EMD UK 2018 NATIONAL SURVEY

WHAT IS THE REPORT?

EMD UK, the national governing body for group exercise, are on a mission to increase participation in group exercise by supporting instructors / teachers and organisations to deliver excellence.

Through our insight work, and the partnership projects we undertake, EMD UK has access to the largest pool of data on the group exercise sector. We use this data to support organisations and instructors to understand and respond to their current and potential markets as well as to promote the physical, social and mental benefits of group exercise.

This data driven approach means we can track current trends in the market and ensure our partners have the right products and tools to meet the needs of participants.

The EMD UK 2016 and 2018 National Survey's and this subsequent report have been carried out to give group exercise providers (leisure operators/gyms/health clubs/instructors/brands/styles) invaluable insights into who their current and potential consumers are, what they are consuming, how they are behaving and why. It is our hope and expectation that these insights will be utilised to ensure that as an industry we are offering inclusive, consumer centric products and services that capitalise on the massive opportunity that group exercise has to reduce levels of inactivity.

Ensuring that products and services are insight driven will not only help to support the reduction of inactivity across the UK, but is key to creating and delivering, sustainable and profitable (where relevant), group exercise activities and businesses.

METHODOLOGY

The 2016 national survey was a UK representative online survey of 1468 adults aged 16+ conducted by YouGov between 19th February 2016 - 7th March 2016. The 2018 national survey was a UK representative online survey of 1500 adults aged 16+ conducted by YouGov between 26th February 2018 - 27th March 2018. The margin of error in the sample size is +/- 3% which should be taken into consideration when viewing the report.

Population level data has been achieved by combining percentages from the representative samples with current population statistics (Office for National Statistics, 2013 and Office for National Statistics, 2018).

Throughout the report data has been cut to be representative of different surveys, different demographics (e.g. England only) and respondent types (e.g. once a week only). The relevant cuts are stated underneath each table/graph along with the relevant survey question/s, sample sizes and any accompanying explanation.

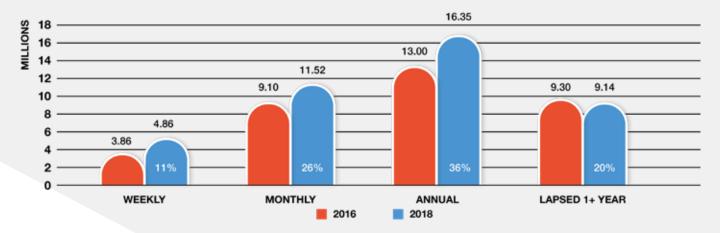
HOW TO USE THIS REPORT

This report will outline key statistics from the report and how these relate to you and your classes. Where possible, we offer next steps for you to follow and tips for how to improve your group exercise offering.



OVERALL PARTICIPATION

Let's take a look at the current group exercise climate.



National Survey, England only

Results are a combination of male (base size: 2016 588, 2018 502) and female (base size: 2016 642, 2018 657) respondents. Participation is derived from a series of questions to (1) determine participation ever, annually or the last 4 weeks and (2) no, of instances over the last 4 weeks with >3 equating to weekly participation. Participation is determined by participation in one of the following types of group exercise classes; Strength and body conditioning, Cardiovascular, Holistic, Dance fitness, Water workouts, Dance.



THERE ARE 1 MILLION MORE WEEKLY PARTICIPANTS COMPARED TO 2016.

There is a large gap between the number of weekly and monthly participants and this gap increases between monthly and annual participants. With over 3 million people currently only exercising on an ad hoc basis, an opportunity exists to convert these people into regular participants.

WHAT DOES THIS MEAN TO ME?

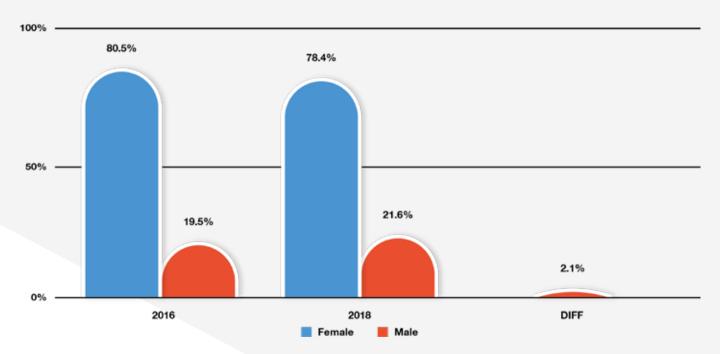
In December 2017, the American College of Sports Medicine released their Worldwide Survey of Fitness Trends for 2018.

The report cited that group training (group exercise) was the number two fitness trend for 2018. It stated "Group exercise instructors teach, lead, and motivate individuals through intentionally designed larger group exercise classes (more than five or it would be group personal training). Group programs are designed to be effective sessions for different fitness levels and are motivational with instructors having leadership techniques that help individuals in their classes achieve fitness goals."

As a group exercise instructor, you are having an impact on participation. You can use this statistic as motivation to get even more people enjoying the benefits of group exercise.



GENDER



National survey 16/18, weekly participants, England only Male (base size: 2016 588, 2018 502) and female (base size: 2016 642, 2018 657)



SINCE 2016 THERE ARE 706,000 MORE WOMEN PARTICIPATING WEEKLY AND 299,000 MORE MEN PARTICIPATING WEEKLY.

WHAT DOES THIS MEAN TO ME?

Although group exercise is a hugely accessible and welcoming sport, it has been dominated by female participation. In recent years, brands such as **Broga** have addressed this imbalance and developed their styles to resonate with the male population.

As more men start to try group exercise, you have the opportunity to reach out to more people. If you're looking to get more men into your classes, think about:

Male participation has increased more than female participation. Although women still make up a significantly larger percentage of total group ex participants, men have taken back 2% of the share.

- Your marketing imagery; is it friendly to all genders? Could you use more inclusive images?
- The pathways group exercise provides. Group exercise is a great way to build stamina and strength before entering competitive sports, like football and rugby. Include phrases such as 'build stamina and strength;' when marketing your classes.
- Approach local sports teams. Explain how group exercise can complement the team's regular training, especially sessions such as HIIT, circuits and boot camps.

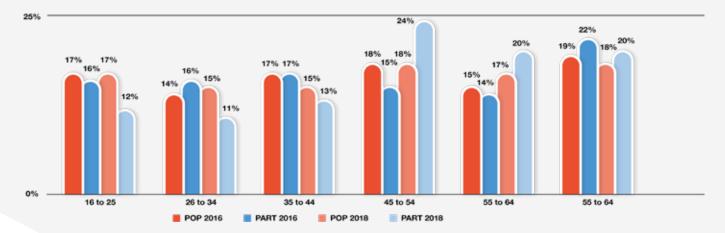
UPSKILL OPPORTUNITY

If you're thinking about providing sessions for sports teams but have no experience or training in HIIT etc, check out the **Level 2 Group Training Qualification**. Fast track options available for Level 2 instructors and Level 3 personal trainers*.

*Conditions apply.



AGE



National survey 16/18, weekly participants, England only, base 161/170 POP = population PART = participants



THE NET INCREASE OF CIRCA 1 MILLION WEEKLY PARTICIPANTS IS COMING FROM THE 45-64 AGE GROUP.

AGE	STYLE	PARTICIPATION NUMBER	
16-44	1.9	1.7	
45-65+	2	3.1	

WHAT DOES THIS MEAN TO ME?

We recently wrote about a report from the Royal Society for Public Health (RSPH). The report – entitled 'That Age Old Question: How Attitudes to Ageing Affect Our Health and Wellbeing' – reveals that ageism is prevalent in our society, with millennials (those aged between 18 and 34) holding the most negative attitudes to ageing of all age groups.

The great thing about group exercise is that it isn't just a young person's game, and the communal atmosphere of group exercise classes make it an activity that's not only good for physical health, but mental health, too.

What this tells us is that it really is ageism that's the problem, and not the actual ages of activity participants themselves – at least when it comes to group exercise.

The older generation is vital to the health and prosperity of our sector, and we welcome group exercise participants of all ages and abilities with open arms.

Active ageing has become a huge part of the health and fitness sector, where opportunities to keep older adults moving are being more widely used. Fitness organisations such as **FLexercise**, **KFA**, **Medau**, and **Move It or Lose It** are a part of this movement.

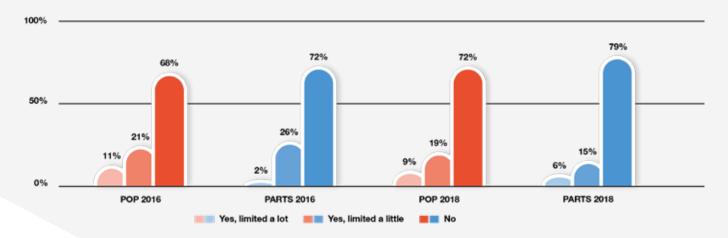
UPSKILL OPPORTUNITY

If you're thinking about working directly with older adults, there is a multitude of training available to you. EMD UK offer Level 3 qualifications in FLexercise, KFA and Medau.

You can find out more here.



DISABLED PARTICIPATION



Q: Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months? National survey 16/18, weekly participants, England only, base 161/170



THERE HAS BEEN NO NET INCREASE IN THE NUMBER OF INDIVIDUALS PARTICIPATING THAT REPORT THEIR DAY-TO-DAY ACTIVITY IS LIMITED DUE TO POOR HEALTH OR DISABILITY.

WHAT DOES THIS MEAN TO ME?

As an instructor, you'll be passionate about creating opportunities for everyone to experience group exercise. When working with clients with disabilities, it's important to:

- Understand if / how they're limited in their movements and exercise. Ensure any participant in your class has a PAR-Q and that you make time to speak to all new class participants to understand their needs, whether they have a disability or not.
- Put the needs of the client first. Although you may teach a
 fantastic class, you need to recognise that the format may not
 be suitable for that client. Consider whether suitable and safe
 adaptations can be made for the client. If you recognise that
 your class is not appropriate for them on any level, ensure you
 go the extra mile to help them mind a more suitable class.
- Ensure your class is visible to people with disabilities where appropriate. When adding or updating your class details on the EMD UK website, add detail to the class listings as to what types of disability you can cater for, as well as any additional requirements you're qualified and insured to train e.g. Parkinson's, pre/post-natal clients etc
- Ensure you're both qualified and ensured to work with your clients. If you're in any doubt whether your training and insurance covers you, call the EMD UK instructor support team on 01403 266000 or email them here.



UPSKILL OPPORTUNITY

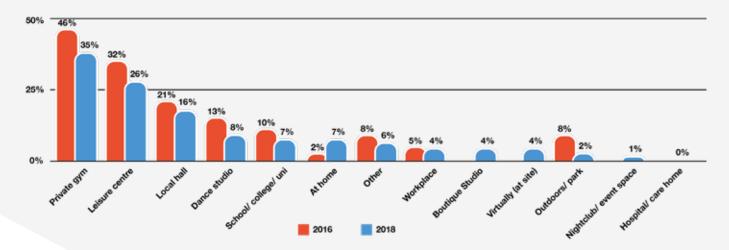
Visit the **InstructAbility website** to find training opportunities for you to work with disabled clients.

If you're looking to teach a chair-based exercise class, consider Seated SOSA from SOSA Dance Fitness. You can find information about their instructor training here.

Remember, you have a duty of care to protect vulnerable adults so make sure you have appropriate safeguarding policies in place and that these are regularly reviewed and updated. **Click here** to view the EMD UK safeguarding policy for adults.



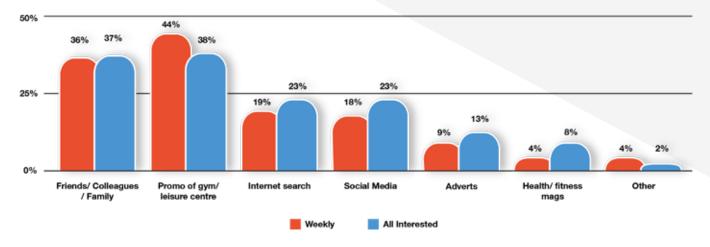
LOCATION AND AWARENESS



Q 2016: Thinking about the last 12 months where have you taken part in a group exercise class? Q 2018: Where do you normally take part in group exercise classes? National survey 16/18, weekly participants, England only, base 161/170



THE TOP THREE GROUP EXERCISE VENUES ARE PRIVATE GYMS, LEISURE CENTRES AND LOCAL HALLS.



Q: How do you find out about new styles of group exercise? Please select all that apply. National survey 18, weekly participants/all 'interested', England only, base 170/461



WORD OF MOUTH CONTINUES TO BE A SIGNIFICANT DRIVER FOR RAISING AWARENESS OF GROUP EXERCISE OPPORTUNITIES.



No matter which venue you're teaching in, you'll want to make your class visible and attractive, so people keep coming back for more! With word of mouth being a key driver, there are some key things you can try to ensure your participants are spreading the good word about your classes:

- First impressions count. Greeting your participants as they enter your teaching space sets a great impression. If you don't know all their names yet, still take the time to smile, say hello and make them feel welcome.
- Explain the benefits. Its important people understand what is actually happening whilst they're exercising, so they can tell others about the benefits. Does your class assist in weight lost? Does it build muscle? Does it increase stamina? Tell them!
- Understand why they're doing the class. Read our **Do You Know Their Why?** blog to understand the importance of rapport-building in your classes.
- Be motivating. No matter what kind of day you've had, you have to #StandAtTheFront and deliver the best session you can. People buy into your energy and will want to tell people when they've had a great class. Equally, they'll want to tell people when they've had a bad class too!

With over 45% of people using social media and/or internet searches to find new group exercise styles, having an online presence is key. This is covered in great detail in our Essential Marketing Hacks for Fitness Instructors resource, which you can find in your EMD UK resource area under 'Marketing and Promotion.' One quick thing you can do to increase online awareness of your class is:

• Upload your class details on Class Finder here



STYLES

The top 10 group exercise styles

	STYLE	PARTICIPATION NUMBER
1	Yoga	1.285m
2	Pilates	887k
3	Spinning® / indoor cycling / RPM	745k
4	Circuits	711k
5	Zumba®	607K
6	Aerobics	586k
7	Body conditioning	585k
8	BODYPUMP™	414K
9	Core stability	357k
10	Aqua aerobics	336k

Q: When was the last time you took part in the following types of group exercise class?

No. of weekly participants that answered 'In the last 4 weeks' National survey 16/18, weekly participants, England only, base 161/170



YOGA, PILATES AND SPINNING® / INDOOR CYCLING / RPM ARE THE THREE MOST POPULAR GROUP EXERCISE CLASSES IN TERMS OF PARTICIPATION.

The top 10 styles encompass a wide range of group exercise disciplines, from dance fitness and strengthening, to holistic styles and water-based fitness. With the top two styles both containing restorative and mindfulness elements, participants are taking a more whole body and mind approach to their exercise regimes.

WHAT DOES THIS MEAN TO ME?

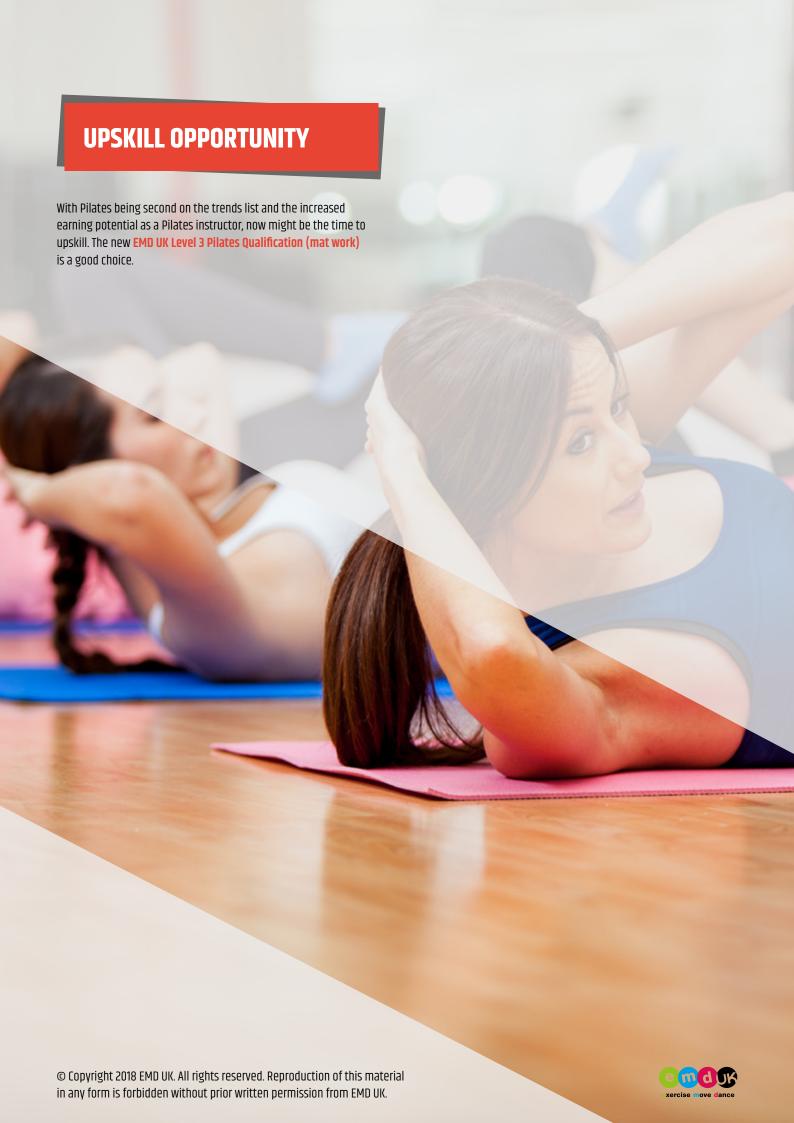
If you're a self-employed group exercise instructor, you are also a business owner. And smart business owners know that investing in development doesn't cost – it pays. There are some key areas you can work on to ensure you're current and relevant in today's group exercise climate:

- Stand out from the crowd
- Deliver personalised experiences
- Increase your earning potential

Read our 3 Reasons You Need to Invest in Your Personal Development blog to find out how you can achieve the above.

Consider approaching local sports teams to see if your group exercise classes could complement their training regimes. Many sports teams are now implementing specific sessions for Pilates, circuits, core stability etc and this could be a great opportunity to expand your reach.





BARRIERS TO PARTICIPATION — CURRENT PARTICIPANTS

Current weekly participants – why don't they do more?

TOP 12/21 REASONS	PARTICIPATION NUMBER
The classes run at inconvenient times	1.253m
None, I am happy with the number of classes I attend	1,252m
Work commitments	1.079m
It's too expensive	965k
I have other hobbies/do other sports	716k
Family commitments	693k
Class is always full	457k
Too many people in one class	360k
My friends are not interested/don't have anyone to go with	351k
I cannot find a group exercise class I would like to do	338k
It is not for me	332k
Difficult to book a class	290k

Q: Which of the following, if any, are reasons why you don't take part in more group exercise classes? National Survey 18, weekly participants, England only, base 170.



THE BIGGEST BARRIER, IN ONE GUISE OR ANOTHER, ACROSS THE TOP 12 REASONS, IS TIME.



Although there are some things that are beyond your control, there are a few tips you may be able to implement:

THE CLASSES RUN AT INCONVENIENT TIMES.

If you run your own classes and are struggling for numbers, try to swap a class around where possible. A recent ukactive report entitled Moving Communities: Active Leisure Trends found that the most popular day for leisure centre visits was a Tuesday and the most popular timeframe to participate in activity was between 9.00am – 12.00pm.

WORK COMMITMENTS.

If people can't come to you, can you go to them? Approach local workplaces and see if you can offer classes on lunch breaks or possibly before or after work to refresh and revitalise their workforce.

IT'S TOO EXPENSIVE.

Although cutting your prices may not be an option, there are ways you can create cost effective options for your participants. Offer a loyalty card scheme where their card is stamped every week with the 10th session being free or create a block booking system where participants pay in bulk for a set number of sessions.

MY FRIENDS ARE NOT INTERESTED/DON'T HAVE ANYONE TO GO WITH.

When marketing your classes, speak about the social benefits and how it's a great opportunity to meet new people. You could even organise a singles event for people to mingle, workout and have drinks after!





BARRIERS TO PARTICIPATION — NON-GROUP EXERCISE PARTICIPANTS

TOP 12/21 REASONS	NO.
It's too expensive	8.553m
The classes run at inconvenient times	6.767m
Work commitments	5.540m
Family commitments	4.124m
I would feel embarrassed	3.488m
I am too conscious of my body image	3.486m
I have other hobbies/do other sports	3.424m
My friends are not interested/don't have anyone to go with	3.424m
I do not have good rhythm/body coordination	3.253m
Not in good enough health	3.165m
I cannot find a group exercise class I would like to do	2.773m
It is not for me	2.437m

Q: Which of the following, if any, are reasons why you don't take part in (more) group exercise classes? National survey 18, weekly participants, England only, base 795



THERE ARE OVER 12 MILLION RESPONSES THAT REFER TO INDIVIDUALS' ABILITY TO PARTICIPATE AND CONFIDENCE TO DO SO. THESE INDIVIDUALS HAVE SAID THAT THEY ARE INTERESTED IN TAKING PART BUT HAVE NOT YET BEEN ENGAGED BY AN OFFER THAT MEETS THEIR EMOTIONAL OR PHYSICAL NEEDS.



Creating a safe space for participants to workout in confidence is key to engaging the biggest group here. Whilst a mindset cannot change overnight, you as an instructor can have an arsenal of tools to help these people overcome their reservations:

- Use testimonials to give people an insight into your classes and the benefits they can expect to receive by taking part regularly.
- Make yourself accessible. Meeting with a nervous potential class goer prior to their first session is a great asset in encouraging them to start. It gives them the chance to meet you, understand the class and ask any questions they have. This can be done face-to-face, over the phone or in email. Offer them the chance to try their first session for free and to come along to watch one week so they can meet other participants.
- Find out what their goals are. Identify the key things they wish to achieve and communicate how your classes can help them work towards those.
- Encourage support outside of the class. Setting up a closed Facebook group for your class participants is a great way for them to support each other and build friendships. You can also quickly share class updates with them and tell them how well their doing in their classes.
- Communicate how accessible group exercise is. In the EMD UK 2017 Sweaty Survey, nearly 80% of beginners (participating for less than 3 months)
 agreed that they felt confident attending the class.
- Demonstrate in your marketing that your class is for all shapes and sizes.





MOTIVATORS AND INFLUENCERS

MOTIVATORS		INFLUENCERS	%
Staying or getting fit		Day/time of class	29%
To lose weight/tone up		The instructor	21%
It's fun		Results the class can give you	15%
Stress relief/relaxation	50%	Your friends	9%
Enjoy exercising in a group	49%	Price	8%
Improving body coordination	48%	Don't know	8%
Something sociable to do with friends	28%	Other	7%
Meeting new people	25%	Class reviews	2%
Trying something different/new	23%	Family member	1%
To reach a goal	19%		
Recommended by a doctor/health professional	8%		
Other	5%		
Don't know	0%		

Motivators: Q: What are your reasons for taking part in group exercise classes? Please tick all that apply. National survey 18, weekly participants, England only, base 170

Influencers: Q: What influences you most in your choice of group exercise class? National Survey 18, weekly participants, England only, base 170



A SIGNIFICANT INFLUENCER IS 'THE INSTRUCTOR' - THAT'S YOU!



You may not think of yourself as an influencer, but you certainly are. You have the ability to make or break a class and ensure people keep coming back for more. There are some basic things that instructors can do to ensure class satisfaction, what we like to call UBETS:

- Update your knowledge at every opportunity to ensure you're top of your game.
- **BE** yourself. Let your personality shine through and inspire your class participants to come back and do more.
- Talk to your class participants. Find out who they are, how they are and remember to welcome them to every class.
- Smile! This always makes people feel at ease, even if you're making them do burpees!

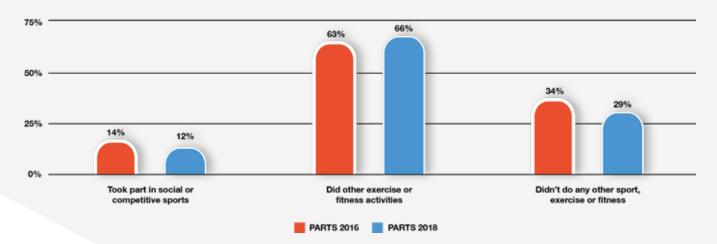
Good examples of great influencers can be found in our three finalists for the IFS 2018 Instructor Award for Promoting Positive Change. Find out about Tracey, Kathryn and Toni here.

It's important to understand the motivators for your class participants so you can ensure your sessions meet their needs. If you're starting to see a drop off in numbers, take the time to reflect to see if your class is hitting the key motivators. Ask your participants if they're happy with the class and be prepared for them to give you feedback.

If you're setting up a new class or marketing a current one, you may wish to include some of the motivators in your marketing; for example, "Class good for getting fit and improving coordination. You'll also meet some great new people in a fun place to exercise. Give us a try!"

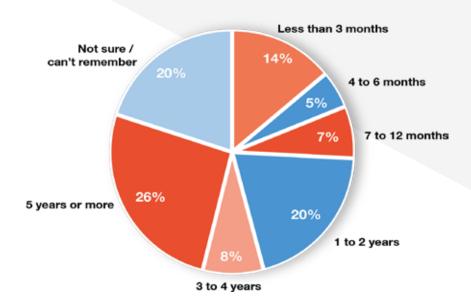


RETENTION



Q: Before you started taking group exercises classes which of the following did you do? Tick all that apply National survey 18, weekly participants, England only, base 170

Those that didn't do anything before - how long have they currently been participating for?



For roughly how long have you been taking part in group exercise classes on a regular basis? National survey 18, weekly participants, England only, base 104

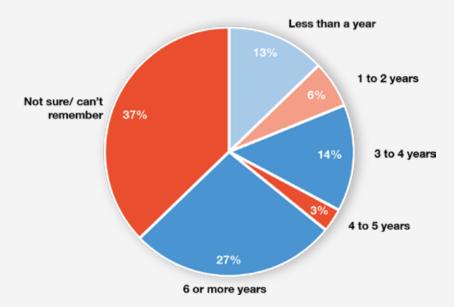


OF THE CURRENT WEEKLY PARTICIPANTS, WHO REPORTED THAT THEY DIDN'T DO ANYTHING BEFORE, MORE THAN 50% HAVE BEEN RETAINED FOR OVER 1 YEAR.

OF THE CIRCA 1.4 MILLION CURRENT WEEKLY PARTICIPANTS THAT WERE PREVIOUSLY INACTIVE, 14% WERE NEW WITHIN THE LAST 3 MONTHS AND 26% NEW WITHIN THE LAST YEAR.



Those that didn't do anything before – how long were they inactive for?



For how long before taking group exercise classes were you not doing any other sport, exercise or fitness? National survey 18, monthly participants, England only, base 104



OVER 40% OF BEGINNERS HAD DONE NO EXERCISE FOR AT LEAST THREE YEARS PREVIOUS TO STARTING.

HALF OF BEGINNERS HAD NOT DONE ANY OTHER SPORT, EXERCISE OR FITNESS FOR AT LEAST 12 MONTHS BEFORE STARTING.



As you've read throughout this report, there are a number of reasons why people participate in group exercise. As an instructor, it's important to understand these reasons and meet the needs of your participants so they want to keep coming back. Some additional things you may want to consider are:

- If you teach your own choreography, change the setlist at least every three months so motivation doesn't waiver. Also include backup choreography for classes if you notice people don't enjoy a track or two.
- Over half of participants come to class because they find it fun. Effective exercise and fun are not mutually exclusive. Use your knowledge to shake things up; are there exercises they can do in pairs or groups? Ask your class what exercise fun they enjoy and incorporate this into your sessions.
- If you've been teaching your classes for a while, the chances are you'll be well acquainted with your participants. Consider organising social outings and they don't need to be big; a coffee after class or a drink down the pub one evening goes a long way.

If you're teaching a range of classes, it's important to remember that people want different things i.e. what works in one class will not necessarily work in another. A recent report on retention, conducted by MINDBODY and published by REPs, found:

THOSE WHO DO HIIT WANT AN INSTRUCTOR WHO PUSHES THEM HARD (12%)

If someone has walked into a HITT class, the likelihood is that they are there to work hard. Find an instructor who isn't afraid to push their clients and who understands what techniques or language they need to adopt to get the best out of them. This will make the client feel accomplished and more likely to return to a class at your studio. HIT classes are often very intense, so finding an instructor who can match the intensity will also work well.

THOSE WHO DO YOGA SEEK PATIENCE THE MOST (12%)

Whilst the practice of yoga is designed to be calming, often the poses and the practice of self-reflection can be a challenge, especially for beginners and those progressing to more advanced positions. Finding instructors who can empathise with this and show patience, helping clients to adjust poses for their ability, is sure to keep clients coming back.

When working with clients who have been previously inactive, you'll need to understand that they may be in a different frame of mind and state of physical fitness to your other participants. To encourage previously inactive people to keep at their classes you could:

- Meet with the client prior to their first class to discuss their goals and needs. Understand why they want to try the class and what has led
 them to you. Ensure you communicate how welcome they will be and that you're excited about them joining your class.
- Give them your contact details so they can get hold of you should they have any further questions about the class.
- Ensure you welcome them when they turn up to class and encourage them throughout the session, giving them adaptations where needed. Be careful not to make them feel too singled out though.
- Follow up with them after class to find out how they feel. Tell them they did well and you're looking forward to seeing them again.



DEMAND

DEMAND FROM CURRENT PARTICIPANTS		DEMAND FROM ALL RESPONDENTS INTERESTED IN PARTICIPATING IN GROUP EXERCISE		CURRENT TOP TEN STYLES THAT ARE PARTICIPATED IN 2018	
Yoga	41%	Yoga	36%	Yoga	26%
Pilates	30%	Pilates	31%	Pilates	18%
Body conditioning	28%	Tai chi	18%	Spinning® / indoor cycling / RPM	15%
Zumba®	24%	Zumba®	18%	Circuits	15%
Spinning® / indoor cycling / RPM	21%	Spinning® / indoor cycling / RPM	17%	Zumba®	12%
Pure abs/core	19%	Body conditioning	17%	Aerobics	12%
Aerobics	19%	Aqua Aerobics	15%	Body conditioning	12%
Boxercise	18%	BODYPUMP™	15%	BODYPUMP™	9%
Tai chi	18%	Boxercise	13%	Core stability	7%
BODYPUMP™	17%	Core stability	13%	Aqua Aerobics	7%
Circuits	17%	Aqua Fit	12%	Pure abs/core	6%
HIIT	17%	Pure abs/core	12%	BODYBALANCE™	6%
Core stability	16%	Aerobics	12%	Step Aerobics	6%
Self defence	15%	Self defence	11%	Aqua Fit	5%
Step Aerobics	14%	HIIT	11%	HIIT	5%

Q: Which group exercise classes would you be most interested in attending? Please tick all that apply

GROUP EXERCISE IS IN DEMAND — CAN YOU MEET THE NEED?

A benefit of group exercise is that there is a style that suits the needs and tastes of everyone, as well as activities that cater for all age ranges. As an instructor, this opens up a huge range of opportunities for you to train in and teach concepts that you're truly passionate about.

With the demand for classes ranging from water-based fitness to strength and conditioning, dance fitness to holistic, which one will you choose for your next style?





