

Les Mills Global Fitness Report 2021

Methodology:

- 12,157 responses
- The report maps fitness habits via an online survey where consumers are randomly invited to participate (run by 'Qualtrics'-partner with over 30 panel providers to supply a network of diverse, quality respondents to their worldwide client base, weighting based off official pop figs, margin of error-0.84%)
- Conducted across all five continents and 15 countries

Highlights

- 75% of regular exercisers do at least one gym-type activity. In the UK, this is 68% which is 14th out of the 15 countries with Japan being at 65% and the top being the middle East at 88%.
- Live fitness classes are the single most popular gym type activity.
- 80% of gym members plan to continue to use digital workouts post pandemic, however, they have categorised a blend of 'in gym' and 'home workouts' as 'omni-channel fitness' with the majority of exercisers favouring a 60:40 split between the two.

'The new Fitness landscape'

- 75% of consumers say they want to exercise more regularly but face barriers with lack of motivation the biggest single barrier at 29%. This rose to 37% for beginners.
- Whilst lockdown has seen more people working out at home, the reason people join clubs and centres is they need the motivation to maintain their exercise habits where there's been encouraging insights in where most members can't wait to get back to their clubs and centres to workout.
- Two thirds of group fitness participants have said social connection of satisfaction with 67% stating they enjoy the energy of the group.

'The live revival'

- 67% of gym members prefer to work out with others in small or large groups. That's 62% for the UK which is 8th out of the top 10 countries with China being the top at 80%.

- The most popular gym type activity is fitness classes to music which are live within a facility at 29%. The other top 2 to make up the top 3 most popular gym type activities are cardio equipment at 28% followed by weight training at 26%.
- 85% of gym members are interested in trying a live group fitness class in their facility.

'The human factor'

- The most important factor for participants in a group fitness class is the **quality** of the instructor. This was also the most important factor for beginners at 30%.
- At 24% was quality music being used.
- 59% of prospects to gyms say 'people' so this could be the instructor and others that work in these facilities. In the UK, this was 60% which was also the same as the US.

'The secret sauce'

- 84% of gym members are also working out at home and the report states that clubs need to ensure the digital user experience matches the standards set in their venues. So, are clubs offering digital versions of their workouts at home?

'What's hot?'

- At 32%, HIIT was the most popular fitness class format. This included the UK and was particularly high for millennials.
- Second was Indoor cycling at 30% and third was dance at 28%.
- 86% of group exercise participants take part in a branded class.

'Starting out'

- 27% of the fitness market in the UK consider themselves to be absolute beginners. In Japan, however, this is 69% and the country to consider themselves to have the least beginners was India at 12%.
- 81% of beginners are interested in at least one form of class offering.
- 84% of beginners say they have at least one barrier when it comes to exercising.

'Total fitness transcendence'

The last part of the report looks at fitness and wellness via employers.

- People who have access to fitness via their employer are 43% more likely to work out than those who don't.
- Employees who don't exercise regularly are 50% more likely to be working unproductively whether that be through illness, injury, exhaustion etc.
- In terms of mental wellbeing & exercising to reduce stress, in the UK, 30% exercise to reduce stress.