

# How much has the cost of living affected you?



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## Methodology

Quantitative research was conducted via an online survey which was live between 8th December 2022 – 5th January 2023 to understand the impact the rising cost of living is having on group exercise instructors.

The survey was sent to EMD UK's database of 23,000 and reached 2,000 views through EMD UK's social media channel facebook. The survey was also shared with EMD UK's stakeholders.

## Executive summary

**A total of 505 responses were received.**

In this report, we can see the impact the rises in the cost of living are having in our sector. Group exercise instructors are having to increase the cost of their classes, seeing their participant numbers decrease and their mental health being affected. However, this is not just isolated to group exercise and the sector needs to be working collaboratively to tackle the issue.



### **48.7% of instructors have said their participant numbers have decreased.**

We know from Sport England's Cost-of-Living Insight research that people's physical activity behaviour is changing. For example, 9% have stopped doing pay as you go activities with another 8% reducing these, 8% have cancelled their gym membership, 8% have reduced the distance they travel to take part and 3% have stopped doing activity altogether.

### **76.2% of instructors' mental health has been affected by the rising cost of living.**

We know through our instructor wellbeing research over 50% of instructors have experienced a mental health issue over the last 12 months and when looking specifically at the topic of the rises in the cost of living, this is just over 76%.



## Executive summary continued...



**58.9% of self-employed, voluntary & other instructors have had to increase the cost of their classes.**

60.7% of this group of instructors have experienced an increase in equipment costs with 57.7% now paying more in facility hire costs.

**Over half of instructors (54.2%) are planning to leave the industry due to the rises in the cost of living with 2.2% of those surveyed already left.**

We know a key reason as to why participants attend group exercise classes is the instructor. Losing the workforce would be devastating to the sector and the levels of participants.



# In the last 18 months have you changed where you teach classes?

Answered: 503

Skipped: 0

In the last 18 months, more respondents in this survey have changed where they teach classes. **'I now teach both online, in person and for an operator'** and **'I stopped working for an operator'** coming out as the top two responses.

**26.0%** I now teach both online and in person for an operator

**25.7%** I stopped working for an operator

**19.1%** I now teach online and in person for myself in the community

**16.3%** I started working for an operator

**15.7%** I started working for myself in the community

**15.5%** I now teach online



# Have you had to increase the cost of your classes?

Answered: 331

**Yes**  
**58.9%**

**No**  
**31.7%**

**N/A**  
**19.7%**

**58.9% of self-employed/voluntary/other instructors have had to increase the cost of their classes.**

Increasing class costs will widen the inclusivity gap that already exists making it even harder to attract beginners and those from lower socio-economic backgrounds into group exercise.

Sport England's Cost-of-Living Insight report highlights that people from lower social economic backgrounds are most likely to agree that the cost-of-living is having a **'significant negative' impact on their ability to be physically active.**

Sport and Recreation Alliance research The Cost-of-Living Crisis: The impact on grassroots community sport and recreation also states that due to higher costs, 70% of clubs plan to charge members more in fees.



# Have you seen a change in your participant numbers?

Answered: 503

Skipped: 0

**Just under half (48.7%)** of instructors have said their participant numbers have decreased.

Decreasing participant numbers will result in reduced income for instructors/increased class prices for the participants increasing the risk of instructors leaving the industry and reducing participation figures in group exercise.



# Has the cost of travel affected your job?

Answered: 503

Skipped: 0



**58.9% of instructors have said the cost of travel has affected their job.**

Two thirds of adults have told us they've made changes to their sport and physical activity behaviour because of cost-of-living increases. Changes include doing activity at home.

**58.9%**

**Yes**

**37.8%**

**No**

**3.4%**

**N/A**

## Have you had to take on any additional jobs due to the cost of living?

Answered: 500

Skipped: 3

**72.2% of instructor's have had to OR, are considering taking on additional jobs due to rises in the cost of living.**

We know from group exercise instructors through this research and previous EMD UK research that they have highlighted a real lack of pay increases not just over recent years but decades.



**Yes**

**44.0%**

**Not currently,  
however, may  
have to**

**29.2%**

**No**

**27.8%**

# Has the cost of living prevented you from upskilling in any of the following?

Answered: 503

Skipped: 0

**Over half (53.5%)** of instructors have said that the cost-of-living has prevented them from upskilling via CPD as well as via courses at 45.1%.



<b>Courses</b> (Level 2 or Level 3 qualifications)	<b>45.1%</b>
<b>CPD</b> (training in a new fitness style)	<b>53.5%</b>
<b>The cost of living hasn't prevented me from upskilling</b>	<b>27.6%</b>
<b>I haven't upskilled by taking a course/CPD</b>	<b>0%</b>

This will result in a workforce not refreshing their knowledge/learning new skills potentially not meeting the needs of participants.

## Have you undertaken a course or CPD in the last 18 months?

Answered: 503

Skipped: 0

Whilst over half have said the cost of living has prevented them from upskilling, almost 80% of instructors have undertaken a course or CPD in the last 18 months. We do not know which courses or CPD instructors have trained or upskilled in, however, it is positive to see instructors are still committed to continually develop to help provide the best group exercise experience.

**Yes**  
**78.5%**



**No**  
**21.5%**

[Click here to check out our CPD courses!](#)



# What is your main reason for not undertaking any courses/CPD?

(Base - 485)

Cost is the main reason instructors haven't undertaken any courses/CPD. EMD UK offer an open bursary for instructors to apply for funding towards short courses and qualifications.

## Top 3 responses:



**50.0%**

**reported COST  
as the main  
reason**



**19.8%**

**Time**



**5.6%**

**Nothing of  
interest**

## Has your mental health been affected by rises in the cost of living?

Answered: 500

Skipped: 3

**Yes**

**50.0%**

**A little**

**26.2%**

**No**

**23.8%**

**76.2% of instructor's mental health has been affected by rises in the cost of living.**

EMD UK's qualitative work on Instructor's Wellbeing also recognised a need for wellbeing support for fitness professionals with a focus on the emotional curriculum.

These are alarming figures for our industry. We hear instructors mental health has been impacted and we need to take action to support instructors to be the best they can be.





## Are you planning to leave the industry due to the rises in the cost of living?

Answered: 500

Skipped: 3

Over half of instructors (54.2%) are planning to leave the industry due to the rises in the cost of living with 2.2% of those surveyed already left.

We know a key reason as to why participants attend group exercise classes is the instructor. Losing the workforce would be devastating to the sector and the levels of participants.



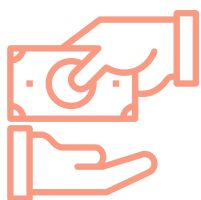


## Other support required (aside from pay)

**As the national governing body for group exercise, EMD UK continue to work with the industry to support the issue of instructor pay, aside from this, is there any other support you require at this time?**

(Base - 485)

(Although we asked aside from instructor pay, instructors felt strongly to respond highlighting the ongoing issue).



**Lack of pay  
increase via  
operators**



**Followed by  
pay in  
general**



**Increased cost of  
venue hire, reduced  
course/CPD fees,  
insurance, getting  
more clients**

There was a real sense that the support required was related to a financial outcome. For example, getting more clients was because without, the increase in venue hire, petrol to run classes & no increased pay was becoming unsustainable with instructors considering leaving the industry.

**[Click here to check out our webinars!](#)**



# How are you employed in the fitness sector?

Answered: 499

Skipped: 4

**Self-employed**

**57.3%**

**Employed**

**43.1%**

**Voluntary**

**16.6%**

**Other**

**0.1%**

**THIS SECTION IS SELF EMPLOYED/VOLUNTARY/OTHER**

## Have you had a change in facility hire costs?

Answered: 331

**57.7% of self-employed/voluntary/other instructors have had an increase in facility hire costs.**

Increasing facility hire costs results in instructors losing income/participants paying additional for their classes during these rises in the cost of living risking losing more of our workforce/more participants not participating in group exercise.

**Yes  
(increased)**

**57.7%**

**Stayed the  
same**

**22.1%**



**Yes  
(decreased)**

**10.6%**

**N/A**

**9.7%**

# Have you seen an increase in costs across any of the following?

Answered: 331

**'Equipment' had seen the biggest increase in cost at 60.7% followed by 'Clothing' at 53.8%.**

Other increases were noted in petrol, heating, license fees, insurance, advertising, venue hire, courses and booking sources.



**Clothing**

**53.8%**



**Equipment**

**60.7%**



**Music**

**34.1%**



**Membership**

**26.9%**

**None of the  
above**

**14.8%**

With instructors outgoings increasing, this cost is likely to be picked up by participants or from instructors earning less if salaries are remaining stagnant again increasing the risk of instructors not being able to afford to remain in the industry/participation reducing in group exercise.



# Have any of the following perks been removed?

Answered: 183

The three biggest perks that have been removed are:



Health insurance

34.4%



Supplier discounts (clothing) etc

33.3%



Free drink

31.7%

We know pay has been stagnant for many years and this is being compounded by the loss of additional benefits.

Our Instructor Wellbeing research highlighted instructors already felt like they had very transactional relationships – ‘they go in, deliver the work, then leave’.



Merchandise (water bottle, sweat towel, etc)

23.1%



Free parking

20.8%



Free/discounted membership

20.2%



All perks have remained

16.4%



Increased pay dependent on participant numbers

10.4%



Insurance

10.4%



Don't receive any perks

7.7%

(other please specify)

Had to buy own uniform

# Have your working hours changed?

Answered: 183

**41.5% of employed/voluntary/other instructors have said their hours have decreased.**

Leisure operators are under huge amounts of financial pressure following on from the closures seen in COVID-19 and now rising electricity bills forcing reduced operating hours and even some closures during the winter period.

Energy costs are typically a leisure operator's second highest cost after staffing costs. (Local Government Association, 2023).

However, **36.1% of employed/voluntary/other instructors who responded said that their hours have increased.** This could be due to the recruitment issues we're seeing with existing instructors being offered additional hours.



**41.5%** Decreased

**36.1%** Increased

**22.4%** Stayed the same

## Has how you are employed changed? (i.e. now being on a zero hour contract)

Answered: 183

**Yes**  
**26.2%**

**have had their contract of employment changed.**



**No**  
**73.8%**

**of employed/voluntary/other instructors haven't had their contract of employment changed.**

Almost  $\frac{3}{4}$  of instructors surveyed have not seen their employment type change. Those who have, we currently do not have further details on what in their contracts have changed.

# Recommendations

This is the first piece of research we have carried out specifically on the rises in the cost of living and we are working collaboratively on what actions can be taken. This research piece will feed into Sport England's sector wide rises in the cost-of-living report to ensure group exercise is represented.

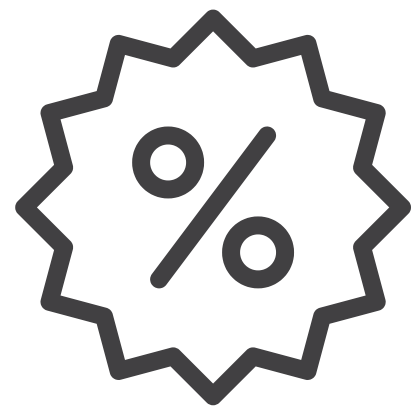


Use the findings to provide support to the group exercise workforce.



Further research into the rising cost of living, we don't envisage this to be short term and this further research should include understanding how group exercise participants specifically are being impacted.

Due to the rising cost of living, the sector should review their offers to reflect the changes (workforce-cost of travel affecting their job, preventing them from upskilling, participants-reduced disposable income & consumer spending etc).



Contact us at [insight@emduk.org](mailto:insight@emduk.org)

For further insight and research please visit:  
[www.emduk.org/services/industry-insight/](http://www.emduk.org/services/industry-insight/)

