



Group fitness participant survey 2022 full report

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Executive Summary

In the dynamic landscape of fitness and wellness, understanding the preferences, motivations, and challenges of individuals engaged in group exercise is paramount.

This research, commissioned by EMD UK and conducted by YouGov, offers a compelling insight into Group Exercise Participation, shedding light on its growing significance in England's fitness landscape.

There are a staggering 4.8 million people in England aged 18 and above who participate in group fitness, having done so four or more times in the last 28 days. Of these, 3.43 million are women, highlighting the considerable female presence in this domain. The popularity of group fitness activities is also on the rise, with Yoga emerging as the frontrunner, despite being ranked 15th in 2022 by the Worldwide Survey of Fitness Trends, closely followed by Body Conditioning, weights-based classes, cardio, HIIT, and Pilates.

The study reveals how group exercise has adapted to changing preferences, with private gyms remaining the favoured location, complemented by a 16% increase in home-based workouts. Online classes now account for 38% of participation, demonstrating the industry's adaptability and resilience.

Notably, group exercise is pivotal in the battle against long-term health conditions, with 35% of participants reporting such conditions. These encompass mental health, mobility issues, long-term pain, and chronic health conditions like diabetes and coronary heart disease. This highlights the role of group exercise instructors in managing and mitigating health challenges.

The study also unravels the barriers that prevent individuals from partaking in group exercise, with 41% citing a lack of personal appeal, 28% deeming it too expensive, and 21% mentioning long-term health conditions or impairments as hindrances. In a broader societal context, Sport England's research on the rising cost of living reveals that 40% of individuals believe this increase has negatively impacted their ability to maintain an active lifestyle, shedding light on the profound economic implications on fitness and well-being.

The reasons behind group exercise participation are multifaceted, but the data reveals that a resounding 78% engage in these activities to improve physical fitness, while 57% aim to lose weight, and 53% prioritize mental health, indicating that the holistic benefits of group exercise extend beyond just the physical realm, making it a powerful tool for overall well-being.

In essence, this research highlights the increasing importance of Group Exercise instructors and their ability to promote participation and addressing long-term health conditions. It serves as a call to action for the fitness industry and healthcare professionals, highlighting the profound impact of group exercise on individual well-being and the broader community's health which needs to be at the heart of NHS strategies to help with Social prescribing.

Who?

There are
4.7 million

weekly group fitness participants (aged 18+) in England. (Who took part 4 or more times in the last 28 days).

3.43 million

weekly group fitness participants are female and 1.21 million are male.

What?



Yoga

is the top group fitness class that group fitness participants take part in. This was at the number 15 spot for 2022 in the Worldwide Survey of Fitness Trends (ACSM, 2022).

Where?



Private Gym

remains the most popular location where group fitness class participants take part, however, there has been an increase of 16% in those taking part 'At mine/someone's house' in comparison to pre COVID-19.

38% take part in online classes (live streamed and on demand). This appetite for online rises to 56% for those who are interested in attending group fitness classes who currently don't participate.

Why?

The top 3 reasons why people don't participate in group fitness classes:

- Doesn't appeal to me (41%)
- 2. Too expensive (28%)
 - 3. Due to long term health conditions, impairments, or illnesses (21%)

Impact on health

In addition to this, Sport England's research into the cost-of-living crisis highlights that 40% of people have stated that increases in the cost of living is having a 'negative impact' on their ability to be active, March 2022 - February 2023 (Sport England, 2022). The research also cites that individuals with a long-term health condition are twice as likely to be inactive (Sport England, 2022).

Despite this, for those who do participate in group fitness classes, there has been an increase in participation by individuals with a long-term health condition, illness, or impairment in comparison to pre COVID-19 activity levels.



Mental health

is the top long-term condition, impairment or illness cited across group fitness participants which has seen increases from 2020. EMD UK research from 2022 also shows that group fitness instructors are requiring mental health knowledge to support clients.

When looking at group fitness instructors, the top 3 qualities group fitness participants look for are:



Positive (personality)



Good coach



Knowledge

We hope you find the report of use and we're always interested to hear your thoughts and how you plan to use the insights so please do get in touch at – <u>insight@emduk.org</u>

Background

EMD UK commissioned YouGov to carry out a quantitative research piece on group fitness participants. The survey was conducted online and sent to YouGov's panel of 800,000+ individuals between 18th-30th March 2022. The total sample size was 1,582 adults (18+). The figures have been weighted and are representative of all adults in England.

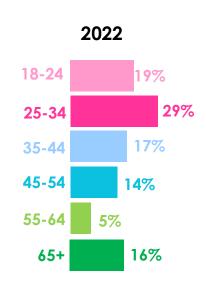
Where possible, comparisons have been made throughout the report to The National Survey 2020 which gives us pre pandemic insights.

NB – throughout the report, not all percentages will total 100 due to decimal rounding.

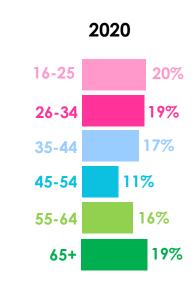


Demographics

We start by looking at the demographic profile of current group fitness participants. Who are taking part – their age, gender, sexual orientation, ethnicity and what long term conditions, impairments, and illnesses they have and if there have been any changes in comparison to pre COVID-19. Please see the appendix to compare the demographics of current group fitness participants in comparison to the national population.



2022 - Base – 275 (group fitness participants who have taken part in group fitness twice or more in the last 28 days)



2020 - Base – 228 (unweighted) (group exercise participants who have taken part twice or more in the last 28 days)

Age

We can see the number of 55–64-year-olds participating in group fitness classes has decreased by 11% in 2022 in comparison to 2020.

We know during the COVID-19 pandemic that group fitness class participation was restricted with leisure facilities closing and participants feeling anxious about returning to their classes.

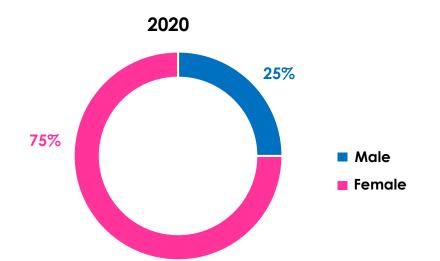
EMD UK's Navigating from Lockdowns report (2022) highlighted that just over 20% of Instructors had seen less than 50% of their participants return with 'Getting clients back', 'Retaining members' and 'Participant barriers' featuring as support requirements.

Gender

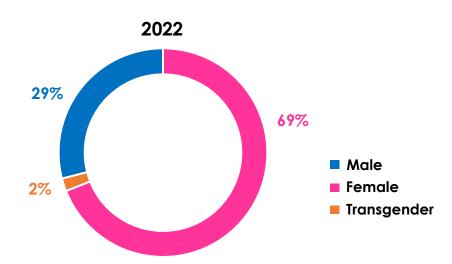
We can see the number of male group fitness participants has increased by 4% in comparison to 2020 with the number of females decreasing by 6%.

Females are the most underrepresented at age 50+ & males aged 25-49 (see appendices 1.0)

We know there are 4.7 million weekly group fitness participants - 3.43 million are female & 1.21 million male.



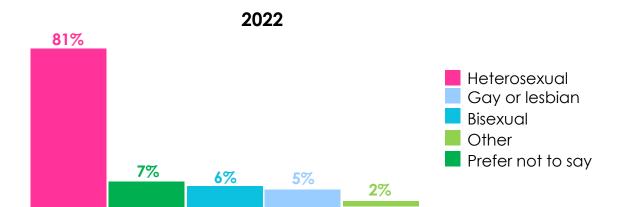
2020 - Base – 228 (group exercise participants who have taken part twice in the last 28 days)



2020 - Base – 275 (group fitness participants who have taken part in group fitness twice or more in the last 28 days)

Sexual Orientation

Group fitness participants are more diverse than the national average with a higher percentage of participants selecting 'Gay or lesbian', 'Bisexual' & 'Other' as their sexual orientation (see appendices 3.0).



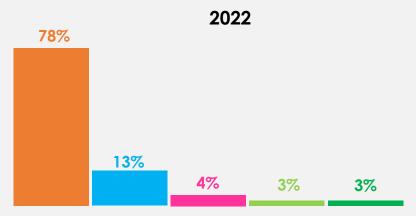
Base (unweighted) – 274 (all those have taken part in group fitness classes twice or more in the last 28 days)

Q. Which of the following best describes your sexuality.

NB - see appendices 2.0 for ethnicity/gender breakdown in comparison to the national population.

Ethnicity



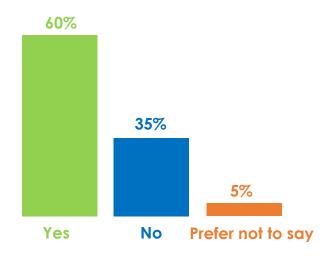


Base (unweighted) – 255 (all those have taken part in group fitness twice or more in the last 28 days)

Q. What ethnic group best describes you? Please select one option only.

Health

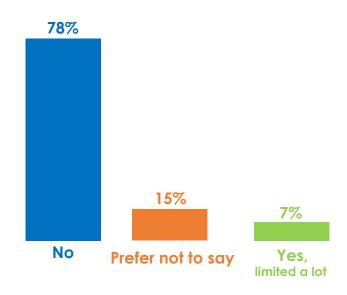
Long term conditions, impairments, or illnesses - 2022



2022 – Q. Do you have any long-term health conditions, impairments or illnesses that have a substantial effect on your ability to do normal daily activities? This could include, for example, physical, sensory, learning, social, behavioural or mental health conditions or impairments. By long-term, we mean they have lasted or are expected to last, 12 months or more.

2022 - Base – 275 (group fitness class participants took part twice in the last 28 days)

Health problems or disability - 2020

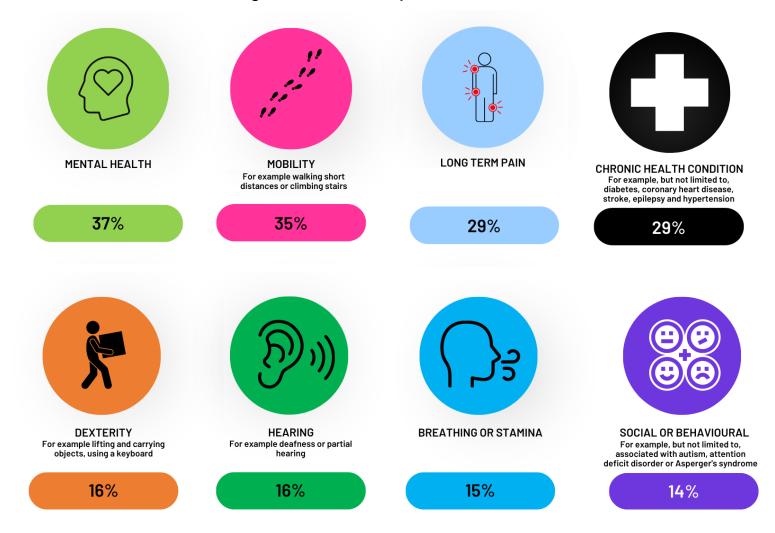


2020 - Q. Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?

2020 - Base - 228 (unweighted)

35% of group fitness participants answered 'yes' to having a long-term health condition, impairment, or illness.

Long term conditions, impairments or illnesses - 2022

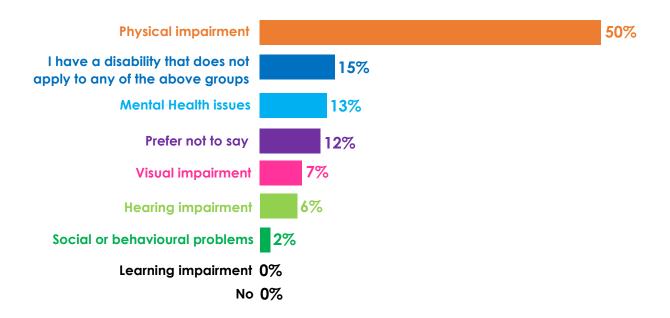


Q. Do these health conditions, impairments or illnesses affect you in any of the following areas? Please select all that apply.

Base (unweighted) – 91 (Group fitness participants took part twice in the last 28 days)

The most common long-term condition, impairment or illness is 'Mental health' followed by 'Mobility' then 'Long term pain' and 'Chronic health condition'.

Disabilities or impairments - 2020



Q. What types of disabilities or impairments do you have?

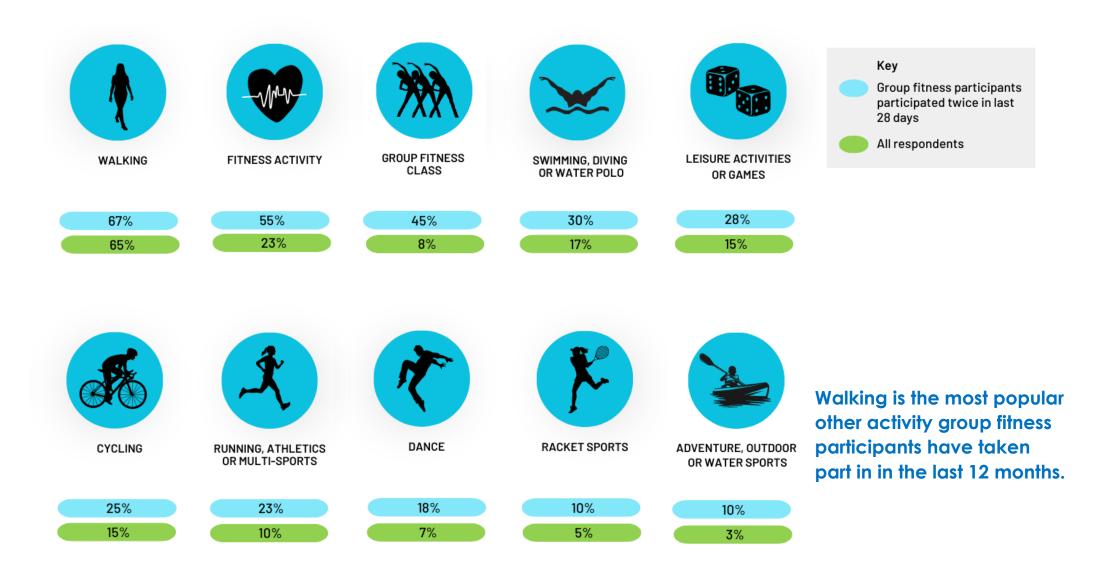
Base – 50 (unweighted) (group fitness participants who took part twice in the last 28 days)

Participation

In this section, we look at all activities current group fitness participants take part in. These are broken down across 12 month and four-week periods. We also look at current group fitness participants activity levels in comparison to the chief medical officers (CMO) guidelines to identify how many meet these. We finish this section with fitness activities current group fitness participants take part in, group fitness classes group fitness participants take part in and types of dance group fitness participants take part in.

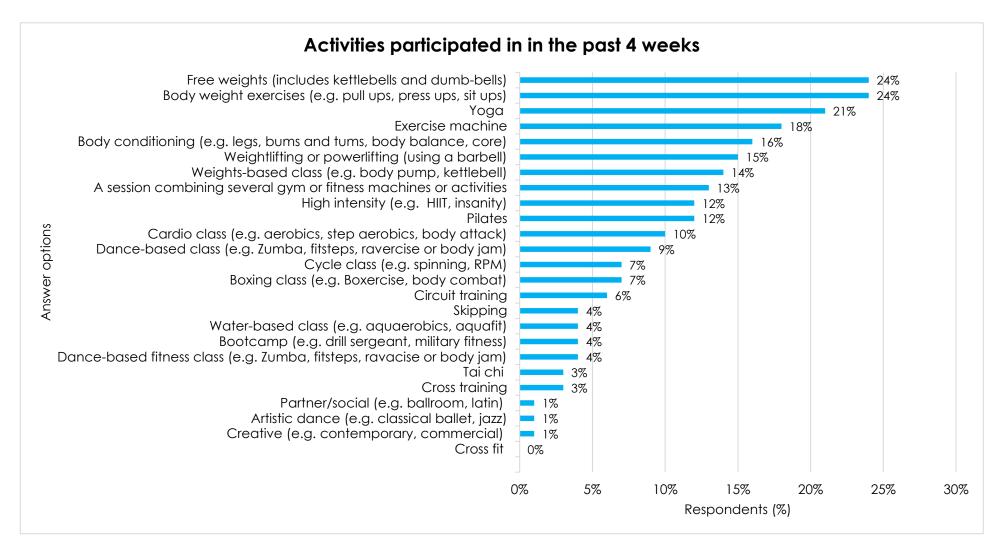


Activities participated in the last 12 months



Q. In the last 12 months, have you done any of these activities? Please select all that apply. Base – 1,582 (all respondents)

Q. In the last 12 months, have you done any of these activities? Please select all that apply. Base (unweighted) – 275 (all those who have taken part in group fitness classes twice or more in the last 28 days)



Q. Have you done any of this/these activity/activities in the past 4 weeks. Please select all that apply.

Base (unweighted) - 274 (all those who have taken part in group fitness classes twice or more in the last 28 days)

The top 3 activities group fitness participants have taken part in in the last month are:

- 1) Free weights
- 2 Body weight exercises
- 3 Yoga

89%

Have participated in a group fitness class at least twice in the last 4 weeks.

Q. Just thinking about the last 4 weeks, on how many days have you done group fitness classes of any type? Please only those classes which raised your breathing rate, made you out of breath or sweat. Please type in a number to indicate the number of days you did a class in the past 4 weeks.

Base (unweighted) – 267 (all those who have done a fitness class in the last 4 weeks)

65%

of fitness class participants meet the CMO guidelines of a minimum of 150 minutes of physical activity per week.

2022 - Q. In the last week for how many hours and minutes did you do any physical activity which was enough to raise your breathing rate? This may include sport, exercise and brisk walking or cycling for recreation or to get to and from places but should not include housework or physical activity that may be part of your job. For example, if you had exercise for one and a half hours, you would type 1 and select 30 mins.

2022 - Base (unweighted) – 268 (Group fitness participants who have participated twice or more in the last 28 days).

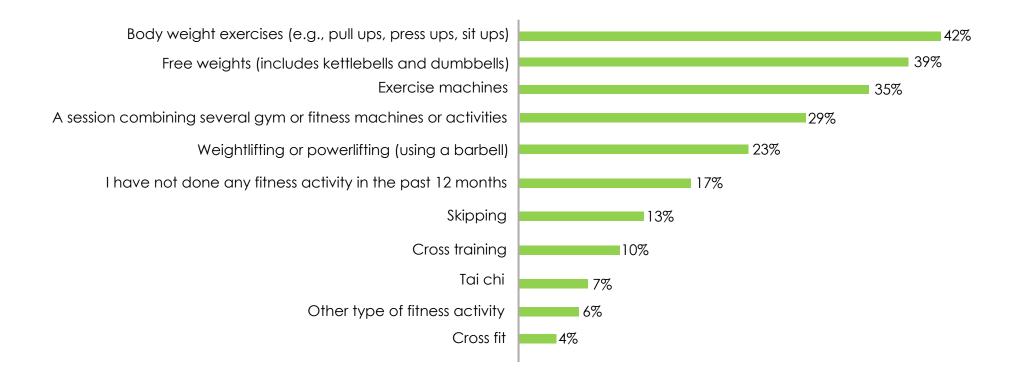
70%

of fitness class participants meet the CMO guidelines of a minimum of 150 minutes of physical activity per week.

2020 - Q. In the past week, on how many days have you done a total of 30 minutes or more of physical activity, which was enough to raise your breathing rate? This may include sport, exercise, and brisk walking or cycling for recreation or to get to and from places but should not include housework or physical activity that may be part of your job. And on the days that you did sport, physical activity (such as gym or fitness classes) or dance in the last 7 days, how long did you usually spend each day? Again, please only include activity which raised your breathing rate, made you out of breath or sweat.

2020 – Base (unweighted) – 228 (Group exercise participants who have participated twice or more in the last 28 days)

Fitness activities group fitness participants participated in the last 12 months



Q. Have you done any of the following fitness activities in the past 12 months? Please select all that apply.

Base – 275 (all those who have taken part in group fitness classes twice or more in the last 28 days)

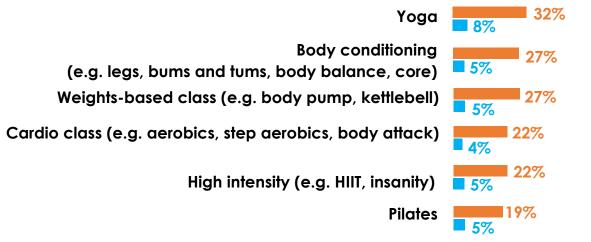
The top 3 activities group fitness participants have taken part in in the 12 last months are:

- 1 Body weight exercises
- **2** Free weights
- 3 Exercise machine

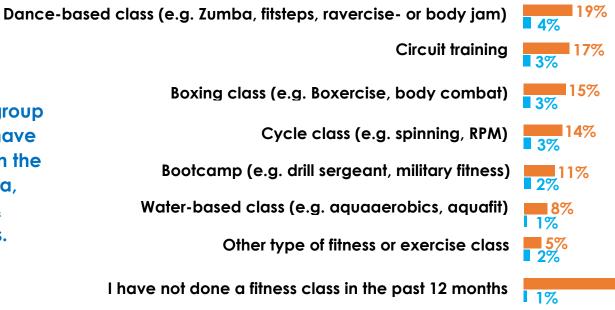
Group fitness classes group fitness participants participated in twice in the last 28 days compared to group fitness classes participated in the last 12 months.



Group fitness classes group fitness participants participated in in the last 28 days \



The top 3 activities group fitness participants have taken part in twice in the last 28 days are yoga, body conditioning & weights-based class.

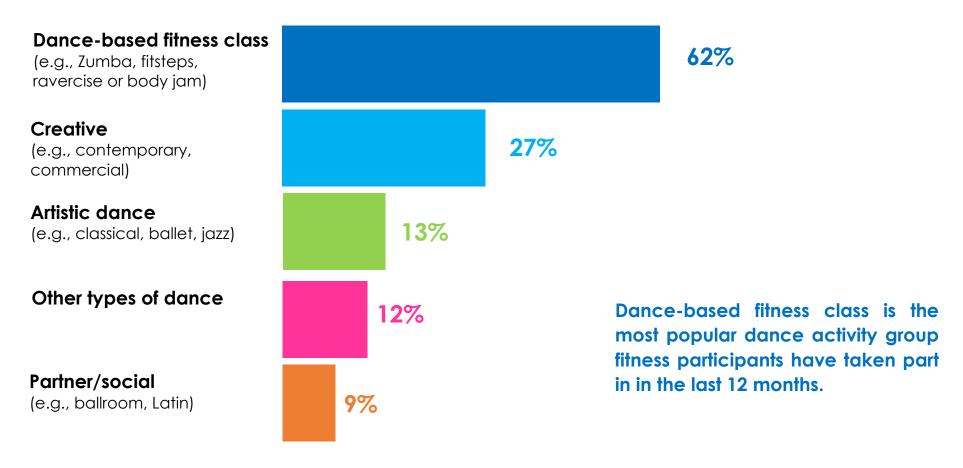


76%

Q. Have you done any of the following group fitness classes in the past 12 months? Please select all that apply.

Base – 275 (all those who have taken part in group fitness classes twice or more in the last 28 days)

Dance activity participation in last 12 months



Q. You previously said you had done a dance activity, in the past 12 months. Which of the following closely describes the activity?

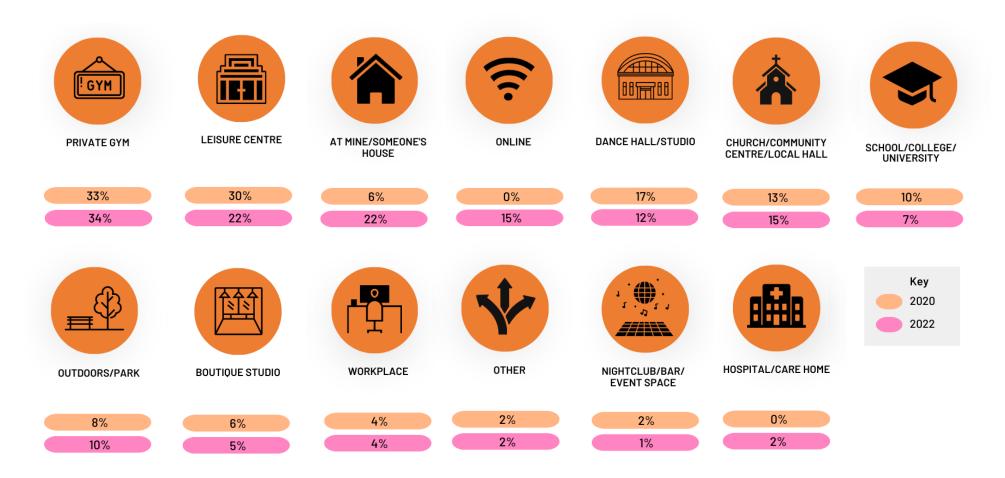
Base (unweighted) – 54 (all those have taken part in group fitness classes twice or more in the last 28 days)

Facilities

In this section we look at where current group fitness participants are taking part and if there have been any notable changes pre COVID-19, how current group fitness participants take part and touch upon wearable technology in group fitness classes.



Where take part



Q. Where do you normally take part in group fitness classes?

2022 - Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

2020 – Base (unweighted) – 228 (group exercise participants who took part twice or more in the last 28 days)



'Private gym' remains the most popular place for group fitness class participants to take part in group fitness classes.

The remaining top 3 for 2022 include:





Leisure centre & 'At mine/someone's house' with 22% taking part.

'At mine/someone's house' in 2022 compared to 6% in 2020.

In comparison to 2020:





'At mine/someone's house' was replaced with 'Dance hall/studio' with 17% taking part here in 2020 compared to 12% in 2022.

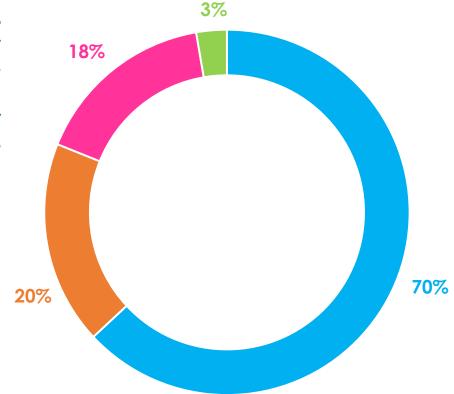
With the closures of private gyms and leisure centres in 2020 and 2021 resulting in the rise of working out at home, we can see the shift in where participants take part post COVID-19 restrictions in 2022 with 'At mine/someone's house' now entering the top 3 spot.

In light of this, those responsible for providing group exercise classes should consider where they continue to provide classes post COVID-19 restrictions in the knowledge that almost a quarter of participants are still taking part at home which has increased by 16 percentage points since pre COVID-19.

How take part

70% of respondents take part in group fitness classes in person with an instructor.

We're still seeing demand for online classes with 38% of respondents taking part through live streaming or via on demand. Similar findings are seen from the workforce with 34.8% teaching online (EMD UK, 2022). This means post COVID-19 there is still demand for reaching participants through delivering classes online.



Live stream (classes you can access online at a set time)

On demand (classes you can access online at any time)

instructor) Other

In person (with an

Q. How do you take part in group fitness classes?

Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

Wearable tech



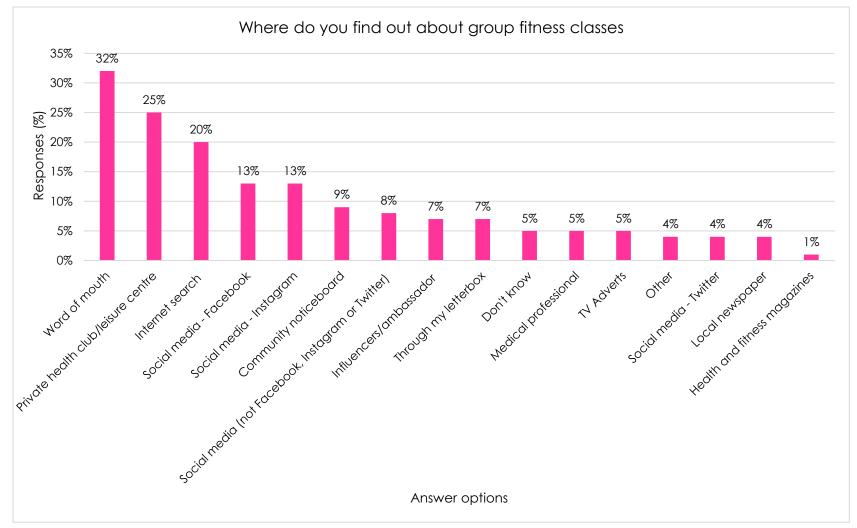
Q. Do you use wearable technology in your group fitness classes?

Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

We're seeing a similar split in those who use wearable technology in their group fitness classes in comparison to those who don't.

Wearable technology has been the number one trend five out of seven times since 2016 always featuring in the top three (ACSM, 2022) however, whilst it's the number one trend across fitness, for group fitness participants there's more of a split. Will be interesting to identify any change in the next year's national survey and if we see any growth in wearable tech and what this could mean for the sector delivering group fitness classes.

Marketing



Q. Where do you find out about group fitness classes? Please select all that apply.

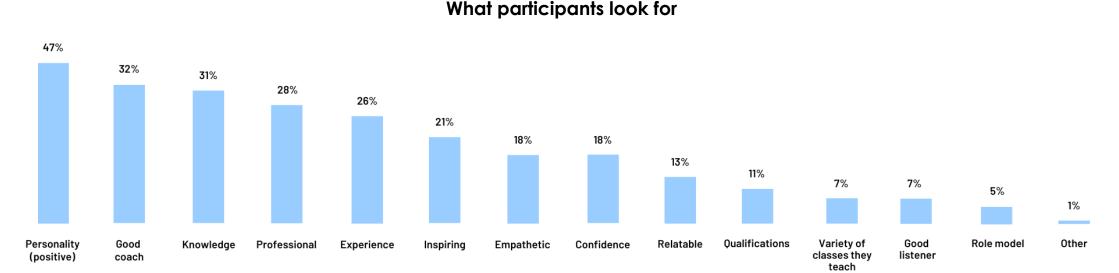
Base (unweighted) - 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

The top 3 ways group fitness participants find out about group fitness classes are:

- 1 Through word of mouth
- 2 Private health club/leisure centre
- (3) Internet search

Group fitness instructors

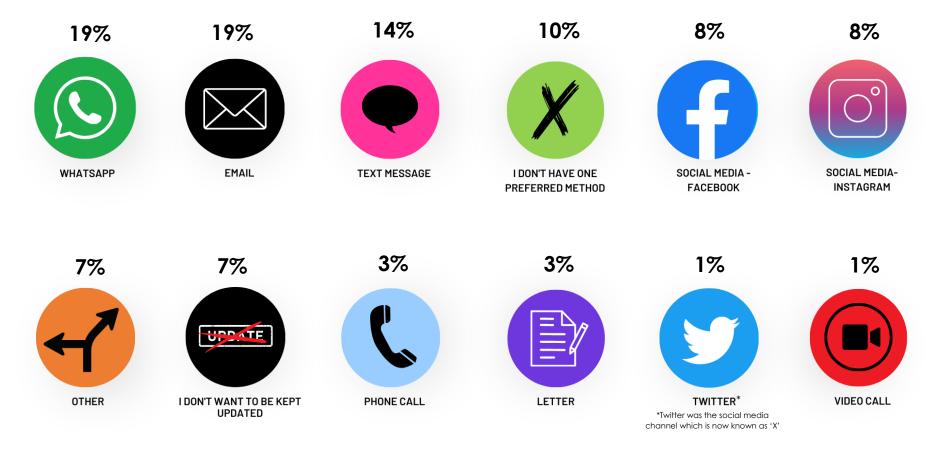
This section explores the group fitness instructor through the participant lens – what current group fitness participants look for when they're attending group fitness classes and how they want to be kept up to date on their classes from their instructor/venue.



Q. Select the three most important qualities you look for in an instructor when attending a group fitness class Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

The top 3 most important qualities group fitness participants look for in an instructor are personality (positive) good coach & knowledge. Looking at important qualities across the sector, UK Coaching's Coaching in the UK (2019) top response was 'Qualifications and training' at 61%. In comparison to current group fitness participants, qualifications just made the top 10 at 11% with the positive personality of the instructor coming in 36 percentage points higher. When recruiting and employing instructors, consider the 'soft skills' alongside the formal qualifications to help ensure you're providing classes that participants are looking to attend.

Methods of communicating



Q. What is your preferred method of communication from your group fitness instructor/venue to hear about your classes?

Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

33% of group fitness participants preferred method of communications from an instructor is via text/WhatsApp followed by email at 19%. Is there an opportunity to communicate with your participants by message directly from yourself?

Group fitness class experience

50% of group fitness participants agree that they find the places and environments where they take part in group fitness classes inclusive and welcoming.

This means the other 50% are neutral or have disagreed. Less than half of group fitness participants agree that they see people like themselves in the places where they exercise. There is an opportunity here for EMD UK to explore these topics further through qualitative research work to dig into these statements and better understand what the sector should be doing to become more inclusive.

Q. To what extent do you agree, or disagree, with the statements below about group fitness classes?

3% 50%

Disagree

I find the places and environments where I take part in group fitness classes inclusive and welcoming.

Base (unweighted) – 275 (all those have taken part in group fitness classes twice or more in the last 28 days)

7% 42%

Disagree Agree

I see people like me in the places where I exercise (all who attend fitness/exercise classes)

Base (unweighted) – 275 (all those have taken part in group fitness twice or more in the last 28 days)

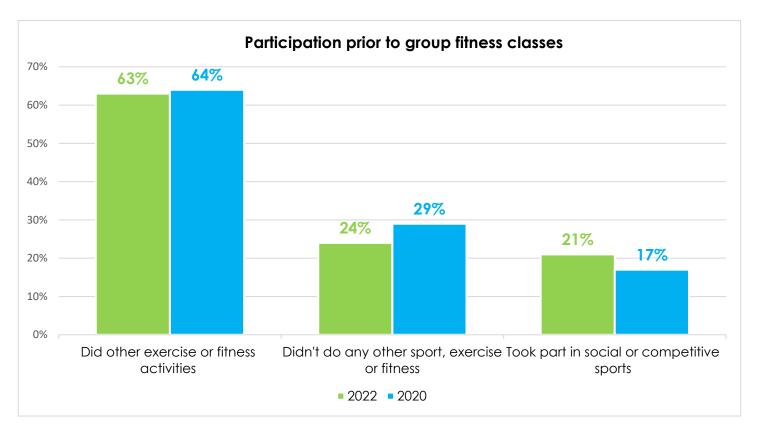
Inactivity

Our final section explores current group fitness participants and inactivity levels prior to group fitness with a pre COVID-19 comparison. We also explore the potential market for group fitness participants - previous participants and those who have never taken part understanding their barriers, motivations and how they would like to participate.



In comparison to 2020, 5% less group fitness participants were inactive prior to participating in group fitness classes.

This means more group fitness participants in 2022 were already doing some form of physical activity prior to participating in group fitness classes in comparison to 2020.

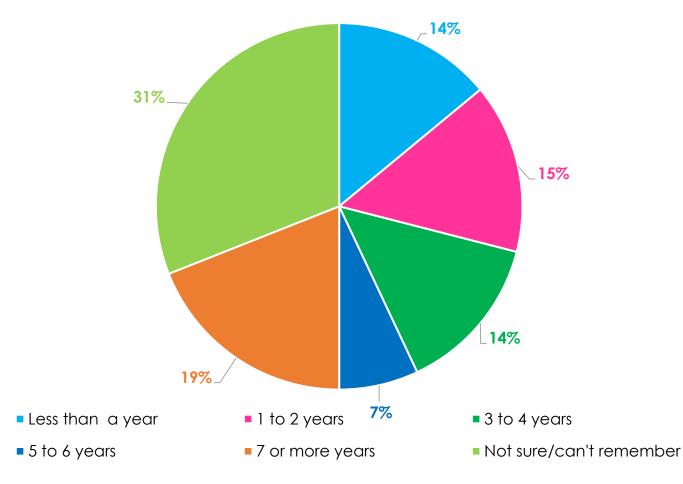


2022 - Q. Before you started taking part in group fitness classes, which, if any, of the following did you do?

2022 - Base (unweighted) – 275 (all those who have taken part in group fitness classes twice or more in the last 28 days)

2020 – Q. Before you started taking group exercise classes, which of the following did you do? 2020 - Base (unweighted) – 228 (group exercise participants who took part twice in the last 28 days)

Inactive prior to group fitness class participation



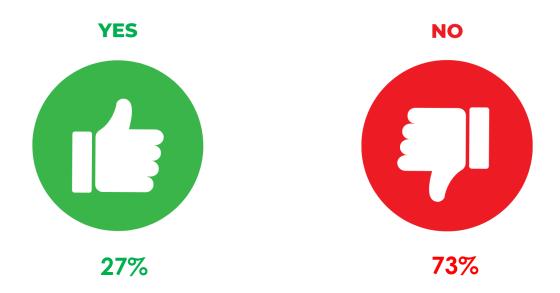
55% of group fitness participants were not doing any other sport, exercise or fitness for a year or more prior to participating in group fitness classes. There is a huge opportunity here for group fitness to engage with the inactive population through EMD UK projects such as This Girl Can Classes.

Q. For how long before taking group fitness classes were you not doing any other sport, exercise, or fitness?

Base (unweighted) – 64 (all those have taken part in group fitness classes twice or more in the last 28 days)

Previous group fitness participants

Those who haven't participated in a group fitness class in the past 12 months, have they ever attended a group fitness class?



73% of those who haven't participated in group fitness classes in the past 12 months have never taken part in group fitness classes. This is a huge market for group fitness class providers to tap into.

Q. You previously said you have not taken part in group fitness classes in the past 12 months. Have you ever attended group fitness classes?

Base (unweighted) – 1,143 (all who do not attend fitness/exercise classes)

Interested in returning to group fitness classes



33%

NOT INTERESTED



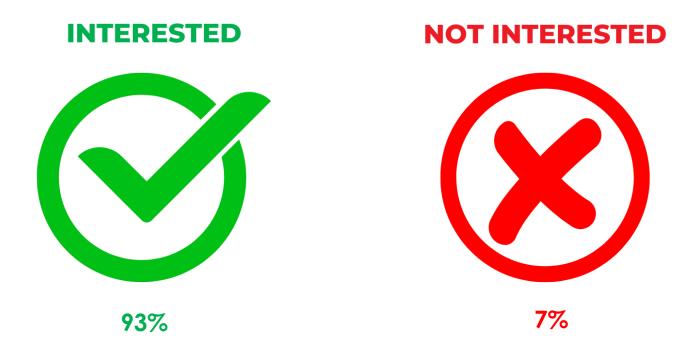
33% of those who are not regular fitness/exercise class participants, however, have taken part in group fitness classes before are interested in returning. This is another market for group fitness providers to increase both participation and income.

Q. Are you interested in returning to group fitness classes?

Base (unweighted) – 283 (all not fitness/exercise class regulars, who have attended classes before)

Non group fitness participants

Interested in returning to group fitness classes



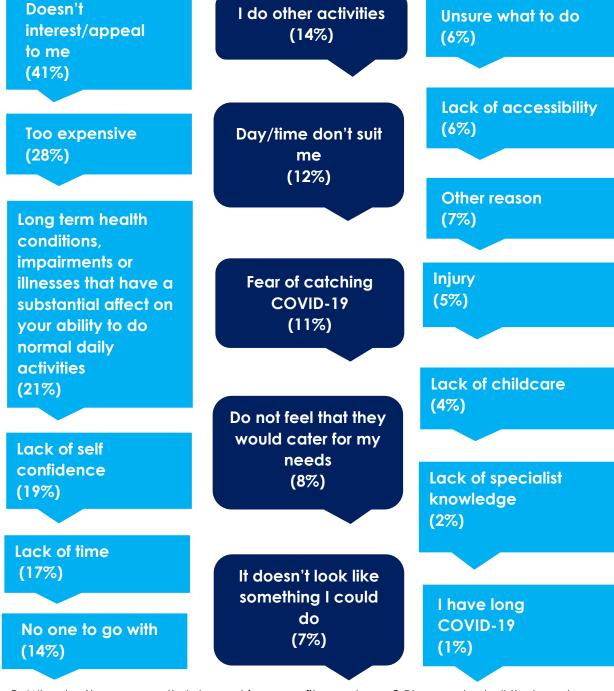
7% of those who are not regular fitness/exercise class participants & have not taken part before are interested in taking part in group fitness classes. However, 93% of those who have never attended group fitness classes are not interested in taking part. We explore on the next page why.

Q. Are you interested in taking part in group fitness classes?

Base (unweighted) – 626 (all not fitness/exercise class regulars, who have not attended classes before)

EMD UK have the opportunity to better understand what about group fitness classes doesn't interest or appeal to this untapped market and why 21% don't take part due to long term health conditions, impairments or illnesses that have a substantial affect on your ability to do normal daily activities.

We know through EMD UK's research 'How much has the cost of living affected you' that over half of the workforce have had to increase the cost of their classes (EMD UK, 2023). With non-participants already citing that 'It's too expensive', the rising cost of living is widening an already existing barrier.



Q. Why don't you currently take part in group fitness classes? Please select all that apply.

Nothing could encourage me to take part in group exercise (52%)

If I had someone to go with (17%)

If I felt it was for someone like me (14%)

If I could participate at home (12%)

Recommended by a medical profession (12%)

The type of class (12%)

Ease of finding out the relevant information before (4%)

If I could attend a free taster (10%)

If I could watch before in person (4%)

Understanding the level of the class (7%)

Other (7%)

If I could speak to the instructor beforehand (4%)

If I could watch before virtually (e.g. YouTube) (5%)

If I had childcare (3%)

We know in this report that over half of participants don't agree that they see people like them in the places that they exercise with one of the top reasons here being 'If I felt like it was for someone like me'.

21% don't take part due to their long-term health conditions, impairments or illnesses. 12% say they would be motivated to take part if they were recommended by a medical professional highlighting that the health sector have a key role to play here in encouraging/referring patients to do so.

'If I could participate at home' was another motivation for those who don't take part in group fitness with 38% of group fitness participants taking part online and 'At mine/someone's house' being the 2nd top place to take part in group fitness. The opportunity is there, however, there is still work to be done to reach those who would be encouraged to take part if they could do so at home.

Q. What might encourage you to take part in group fitness classes?

Base (unweighted) – 909 (all who don't attend fitness/exercise classes)

The top reasons for those who are interested in taking part in group fitness classes are – 'To improve my physical fitness', 'To lose weight' & 'To improve my mental health'.

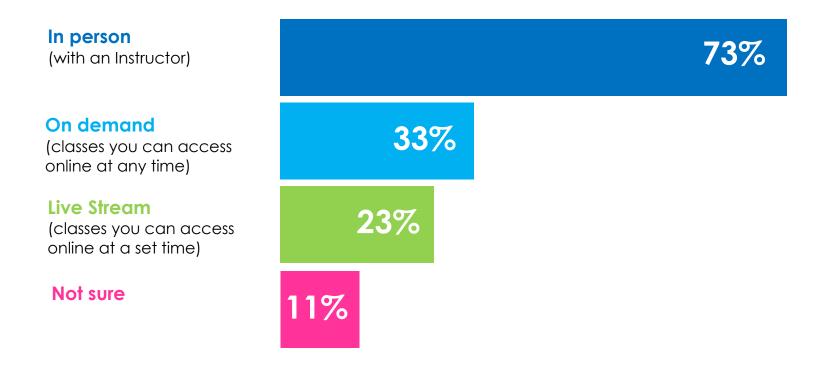
Providers should utilise these messages in their marketing to help attract those who are interested, however, are not currently taking part in group fitness classes and work with the wider industry who can support and signpost these people into group fitness classes such as the health sector.

To improve my Help recover from To meet new people physical fitness injury (25%)(78%) (7%) To be a positive role To lose weight Gives me something (57%) to do (7%) (19%)To improve my To spend time with mental health To have some me family/friends time (53%) (5%) (16%) To tone up (48%) COVID-19 awareness (to **Recommended by** overall look after medical myself better) professionals To de-stress (3%) (11%)(47%) Help recover from To help my anxiety Not sure illness (26%) (2%) (9%)

Q. Why might you be interested in taking part in group fitness classes?

Base (unweighted) – 147 (all interested in attending fitness classes)

How would you like to take part in group fitness classes?



Q. How would you like to take part in group fitness classes?

Base (unweighted) – 147 (all interested in attending group fitness classes)

73% of people who are interested in attending group fitness classes would like to take part in person (with an instructor) and over half would like to take part online. This corresponds to how current group fitness class participants are taking part and shows demand for those who are interested in taking part how they would like to participate.



Recommendations

In light of this report, EMD UK plan to educate our sector via our members (workforce and organisations) to support using these insights in their business and when planning and delivering group fitness classes.

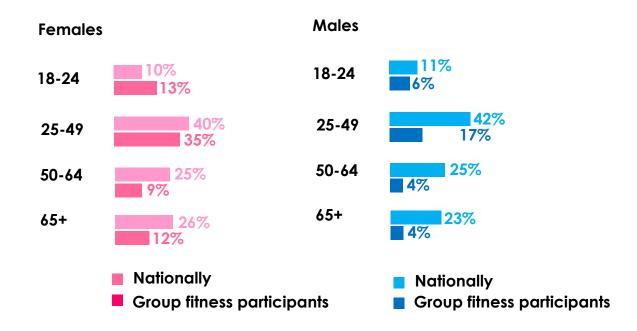
EMD UK are keen to work with our stakeholders to discuss these findings, add weight to existing datasets to provide an evidence base of participant requirements and how these can be implemented across the sector to help group fitness to grow and be more inclusive.

There are further opportunities to segment the data and EMD UK would be keen to hear from organisations on their support requirements.

Appendix

The national demographic picture vs demographic group fitness participation

1.0 Age and gender



2.0 Ethnicity and gender

Females	Nationality	Group fitness participants
Mixed/multiple ethnic group	1%	1%
Asian/Asian British	7%	6%
Black/African/Caribbean/Black British	3%	3%
White	88%	59%
Other ethnic group	1%	1%

Base (unweighted) – 255 (all those who have taken part in group fitness twice or more in the last 28 days)

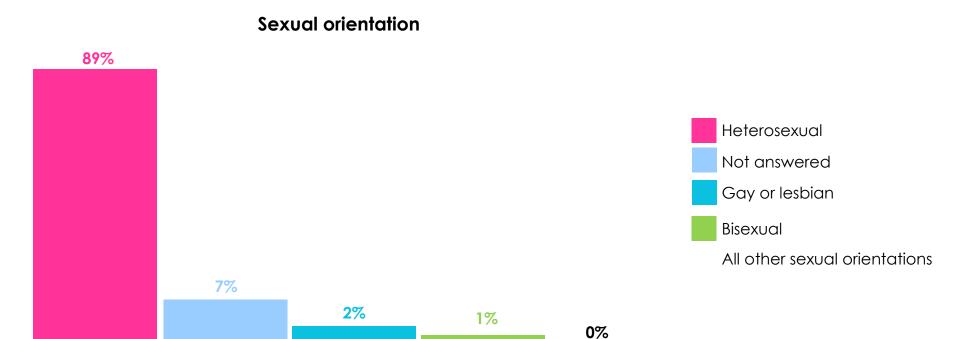
NB data taken from Census 2011- ethnicity by gender has not yet been released by Census 2021 data

Males	Nationality	Group fitness participants
Mixed/multiple ethnic group	1%	2%
Asian/Asian British	7%	7%
Black/African/Caribbean/Black British	3%	1%
White	87%	18%
Other ethnic group	1%	2%

Base (unweighted) – 255 (all those who have taken part in group fitness twice or more in the last 28 days)

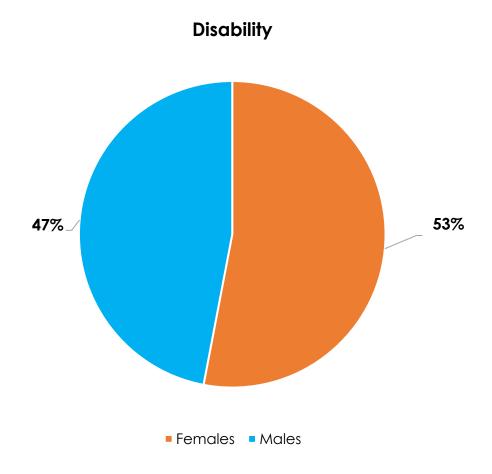
NB - data taken from Census 2011- ethnicity by gender has not yet been released by Census 2021 data

3.0 Sexual orientation



NB - data taken from Census 2021

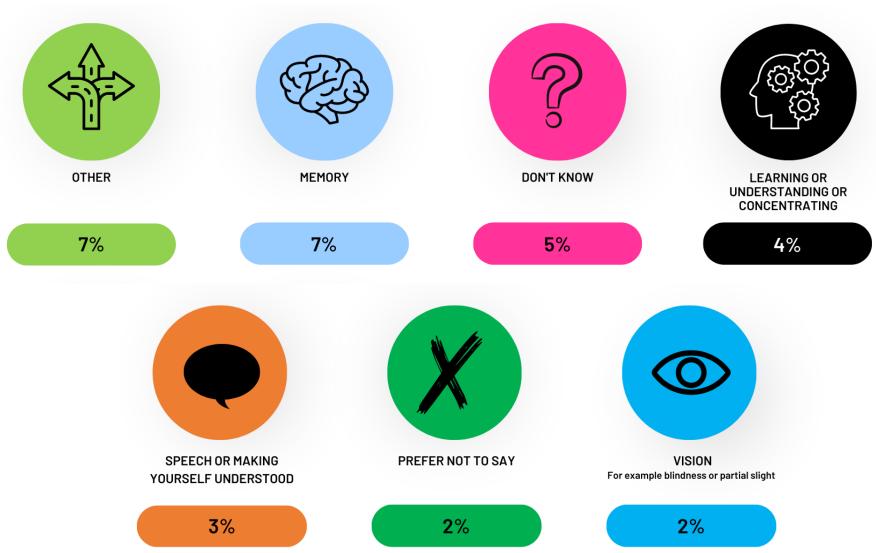
4.0 Disability and gender



All those with a disability

NB – data taken from Census 2011

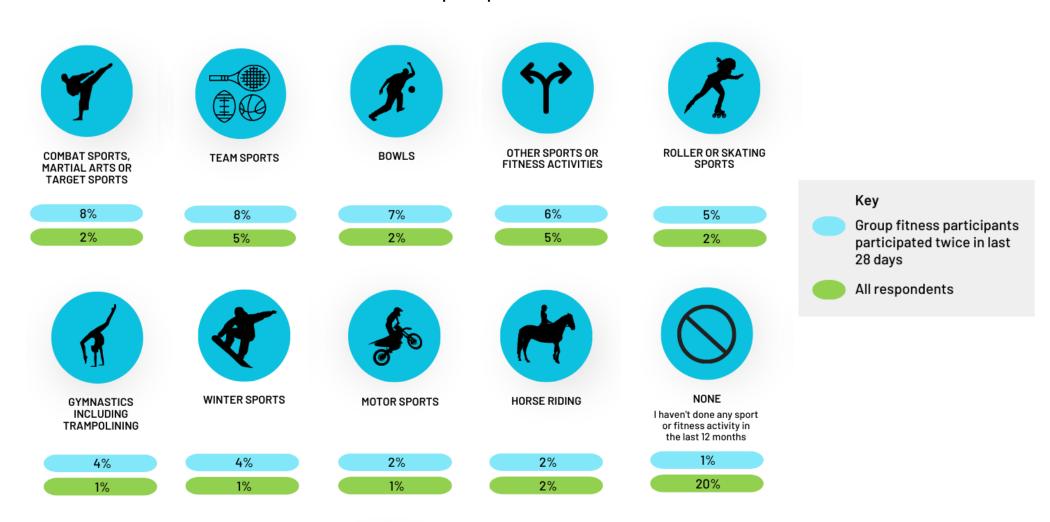
Long term conditions, impairments or illnesses - 2022



Q. Do these health conditions, impairments or illnesses affect you in any of the following areas? Please select all that apply.

Base (unweighted) – 91 (Group fitness participants took part twice in the last 28 days)

Activities participated in the last 12 months



Q. In the last 12 months, have you done any of these activities? Please select all that apply. Base – 1,582 (all respondents)

Q. In the last 12 months, have you done any of these activities? Please select all that apply. Base (unweighted) – 275 (all those who have taken part in group fitness classes twice or more in the last 28 days)

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