



Les Mills Global Consumer Fitness Survey
2019

Key Insights

Introduction —

Much has been written already about society's youngest generations – Gen Z and Millennials – but 2019 will be the year they decisively convert column inches into consumer market dominance. This year will see these two demographics make up 63% of the global population, so a successful relationship between them and fitness is fundamental to the health of our industry and our pursuit of a fitter planet.

So who are they? Gen Z were born in the mid-1990s to 2010 and are today aged 8 to 24. Meanwhile, Millennials were born in the early 1980s to the mid-1990s and are today aged 25 to 38.

Attracting and keeping these demographics represents both a major challenge and an opportunity for health clubs. Finding the right balance of people, equipment, and club design, presents a complex puzzle, which, if solved, can bring substantial benefits to your club's bottom line.

But these generations have changed the game and rewritten the conventional rules of fitness. Gen Z and Millennials require a very different approach to the generations preceding them. Only through targeting them by segment and by goal can clubs forge long-term relationships with these canny consumers and build lucrative member-lifetime value.

Our new research – the largest global consumer fitness survey ever – has unearthed vital insights into these generations. The key findings are summarized in this report.

Notes on research used —

Here at Les Mills, we believe in the power of sharing data and insights to grow the fitness industry's footprint. All the figures within this report are drawn from the Les Mills Global Consumer Fitness Survey 2019 and our own Les Mills club data. We partnered with Qualtrics, a leading enterprise survey technology solution, to produce an online survey that was

conducted across 22 countries and translated into 13 languages. Quotas were set by country, to ensure our research reflects the global population and provides quality insights. More than 16,000 responses were received, over 12,000 of which provide the basis for the majority of the insight.

Part. 1

Over half of new members are under 30

Most clubs can tell you the average age of their members, but far fewer focus on the average age of new joiners. Why does this matter?

Arming yourself with such insight enables you to perfect your new member strategy. Not only will this highlight how to hone the focus of your marketing to target the younger generations making up the bulk of new members, but also help you build and maintain a relationship with them to drive long-term retention benefits.

Try reviewing your new joiner demographic. What is the average age? And how has this changed over the last five years?

It's likely that the average age of your current membership will be closer to 40 than to 30 – that's a decade of difference. Attitude, income, available leisure time, personal and career goals all play a part in their decision-making. These need to be accounted for when targeting them.

What changes could you make to reach this audience at the right time, with the right message, to increase impact?

36.4

Mean age – All Members

VS

30.2

Mean age – New Joiners

Figure 1: The above is member data from Les Mills Gym Auckland NZ. The Mean Age New Joiner is the mean of all New Joiners over an 18-month period, and the Mean Age All Members was taken as a snapshot at the end of that 18-month period.

New joiner demographic by age (under 30's total 59%)



32% of the total adult population attend a gym/fitness center/health club

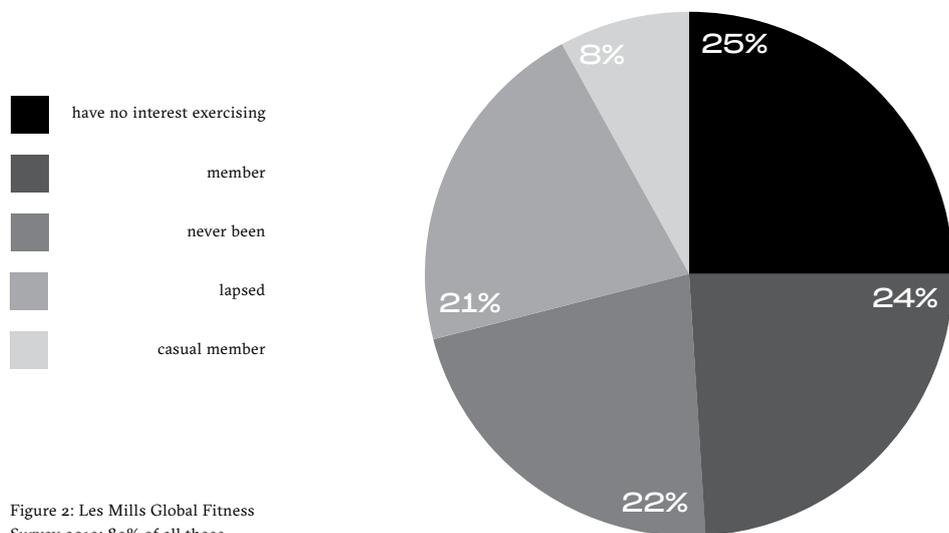
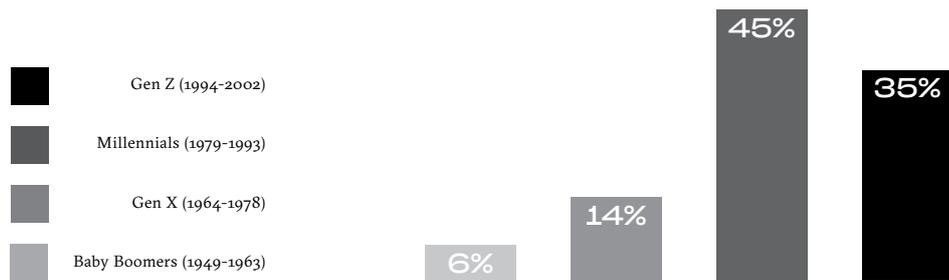


Figure 2: Les Mills Global Fitness Survey 2019: 80% of all those attending a gym are Gen Z and Millennials.



80% of all those attending a gym are Gen Z or Millennial

Part. 2

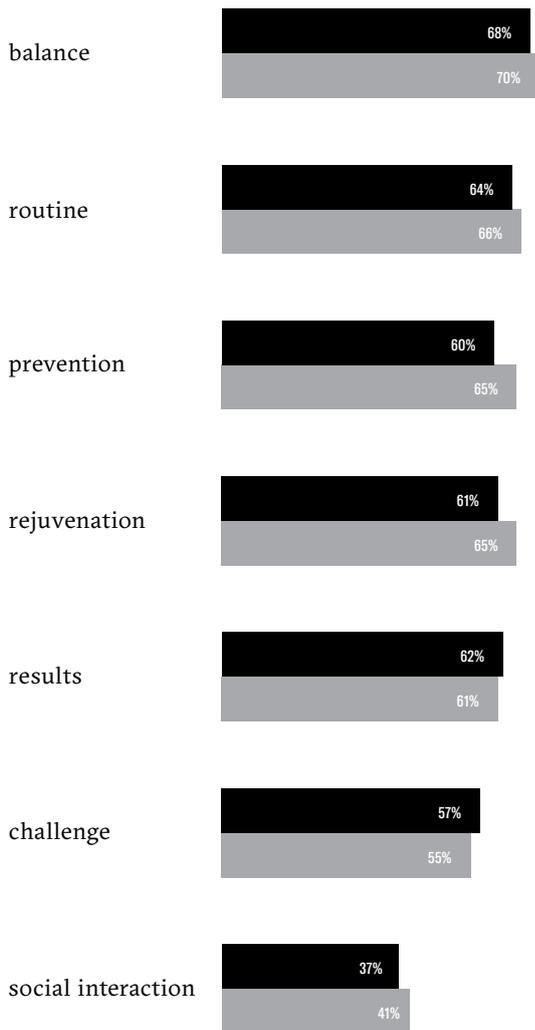
Now they've joined, let's keep them motivated

Gen Z and Millennials enjoy the more social aspects of exercise, with a preference to workout with others. They're also significantly more likely to try new workouts, research nutrition tips, and seek out eating plans to support a healthier lifestyle. The feeling of being stronger and achieving self-improvement are important elements to all regular exercises, but particularly these generations.

Gen Z are especially focused on how they look, with over half (54%) stating their main reason for exercise is to get in and/or maintain shape.

The combination of a balanced gym and studio timetable, where these new members can join in group activities, will encourage a higher attendance frequency and subsequently a better retention rate. Millennials and Gen Z make up the larger proportion of those doing fitness class activities – Millennials (52%); Gen Z (50%) – so the onus is on clubs to meet this demand with dynamic workout experiences.

What experiences could this group currently expect to receive from your health club? Do you believe these will match up to expectations?



Millennials show a similar trend to older generations, where they are more motivated by workout experiences that deliver on Balance, Routine and Prevention.

A workout / fitness experience that provides results and challenge has a higher level of appeal for Gen Z

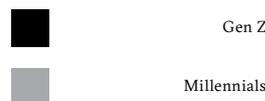


Figure 3: Les Mills Global Fitness Survey 2019: Average of 69% of Gen Z and Millennials say balance is an important factor.

46%

Of Regular Exercisers
are doing Fitness
Class Activities

*however a greater
proportion of those
participants are from the
younger generations*

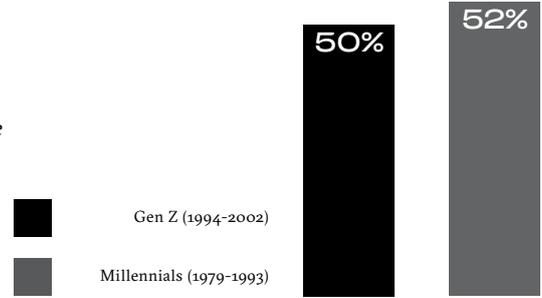


Figure 4: Les Mills Global Fitness Survey 2019: % of Regular Exercisers doing Fitness Class Activities by generation.

Gen Z
Reason for Exercise

*they're also significantly
more likely than other age
groups to want to....*

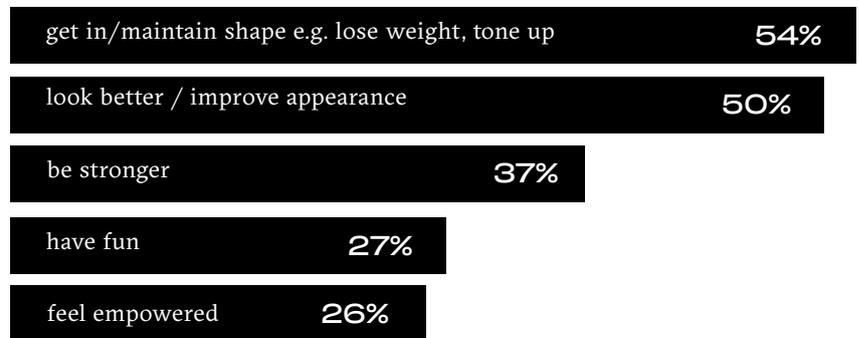


Figure 5: Les Mills Global Fitness Survey 2019: 54% Gen Z say getting and staying in shape is a reason to exercise.



Part. 3

They're not limiting themselves to just one area in the gym

The new generations of gym users love to try new things. 80% of Gen Z and Millennials take part in both gym-type activities* and fitness classes, demonstrating their desire to experience and fully utilize the range of exercise types that clubs have to offer.

Keeping these members updated via their preferred contact method and in-club messaging will help facilitate their participation and ensure your club remains a regular touch-point in their busy digital lives.

79% of those doing Gym Type activities are either Gen Z or Millennials

81% of those doing fitness class activities are either Gen Z or Millennials

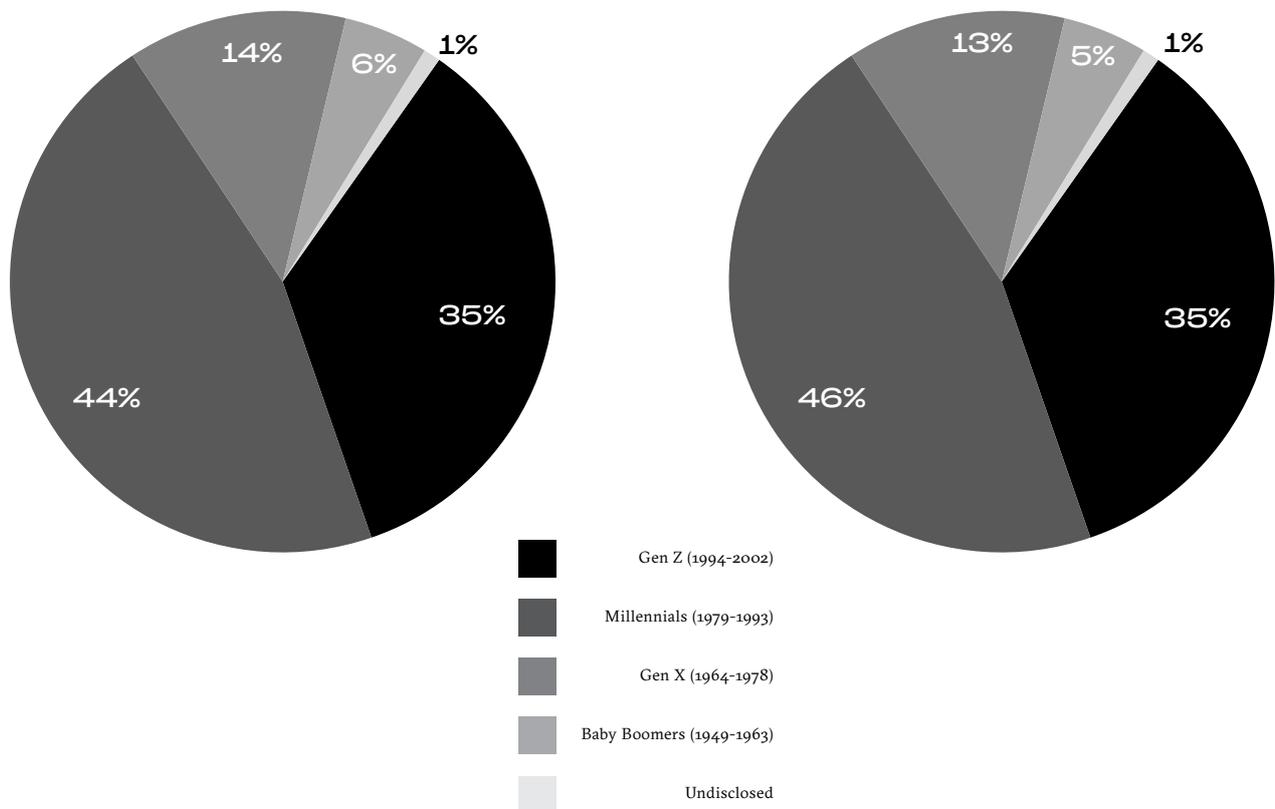


Figure 6: Les Mills Global Fitness Survey 2019: *Gym-type activities are defined as weight training, cardio equipment, group workouts to music, personal training, small group training, functional workouts.

Part. 4

Over half of all members want more gym time

What an opportunity! Gen Z is the most active membership category, with 87% exercising three or more times per week. And yet they still want more. Getting members into the habit of attending the gym more than twice a week is the foundation to building a better relationship, which translates into increased membership length.

Both Gen Z and Millennials are equally dissatisfied with their gym attendance frequency when compared with The Market*. Like The Market in general, this dissatisfaction stems from the same three things: they consider their gym attendance is limited by their being too busy, their facility being too crowded, and the opening hours being inconvenient.

It should come as no surprise that the multipurpose gym is still king when it comes to share of membership. Perhaps less expectedly, Gen Z and Millennials name home as their second favorite place to work out. With online and app use high at 98%, this audience likes the freedom and flexibility of being able to exercise on its own terms.

89% of those doing online or app workouts are either Gen Z or Millennials

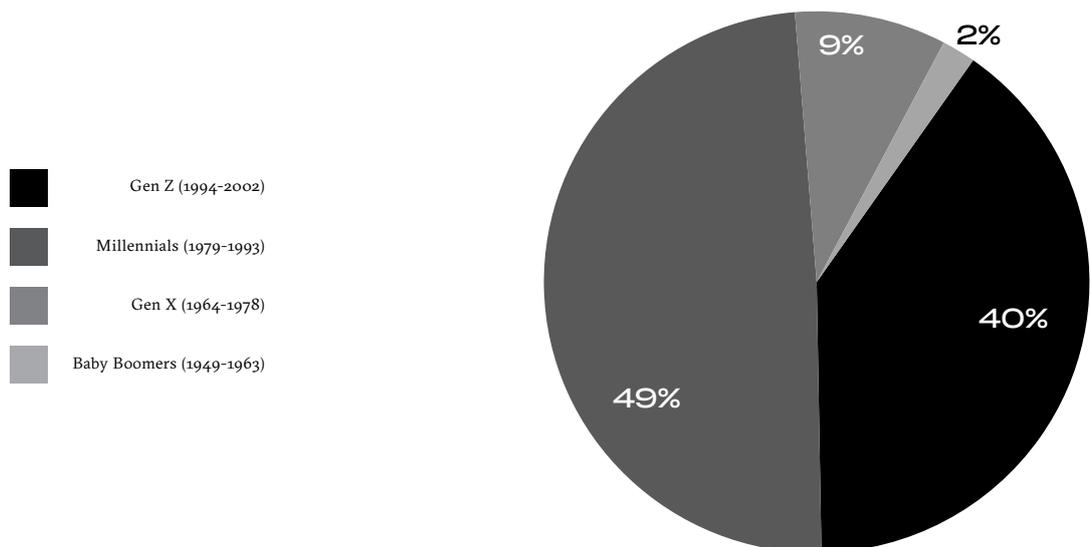


Figure 7: Les Mills Global Fitness Survey 2019: 89% of Gen Z and Millennials use online or app-based workouts.

*The Market are all adults aged 16+ who regularly exercise to keep fit and healthy/maintain good physical appearance, and those who want to exercise to keep fit and healthy/maintain good physical appearance but are not currently doing so.

Multipurpose facilities garner the largest share of wallet from participants of group workouts to music

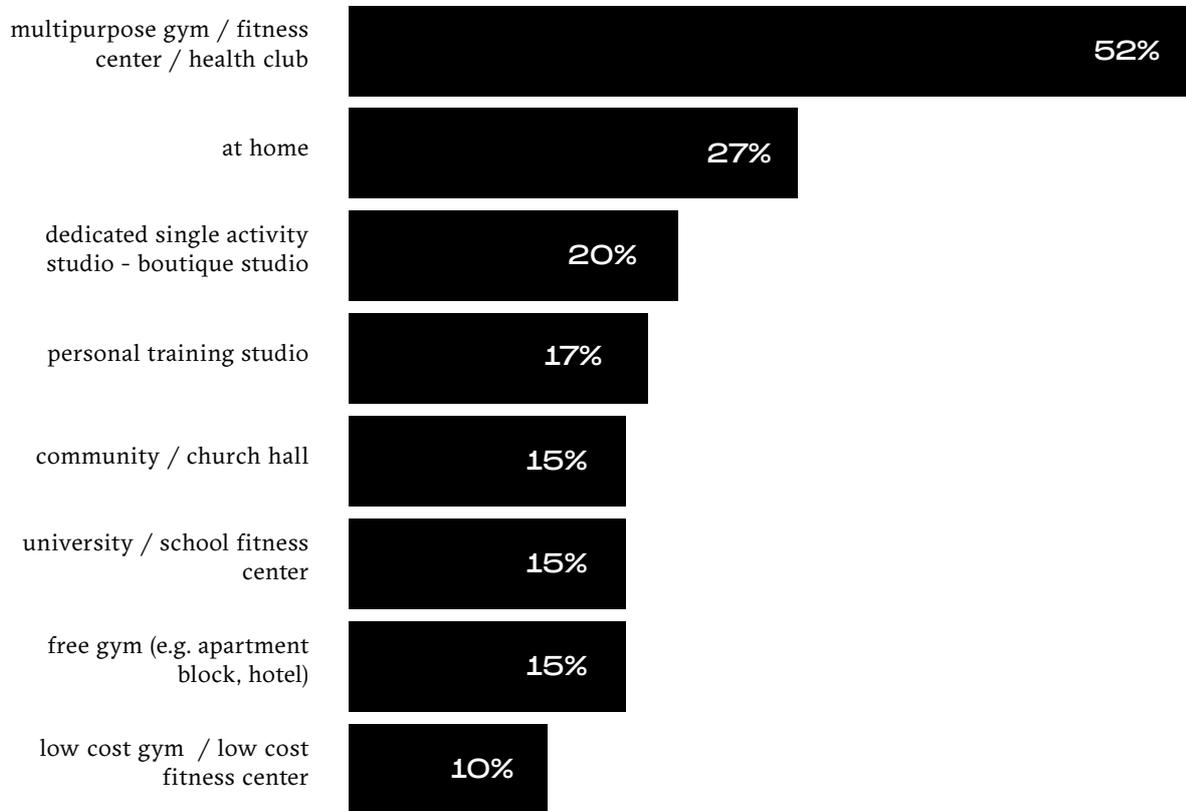


Figure 8: Les Mills Global Fitness Survey 2019: Share of wallet

Over half of gym members aren't happy with the amount they're visiting their facility

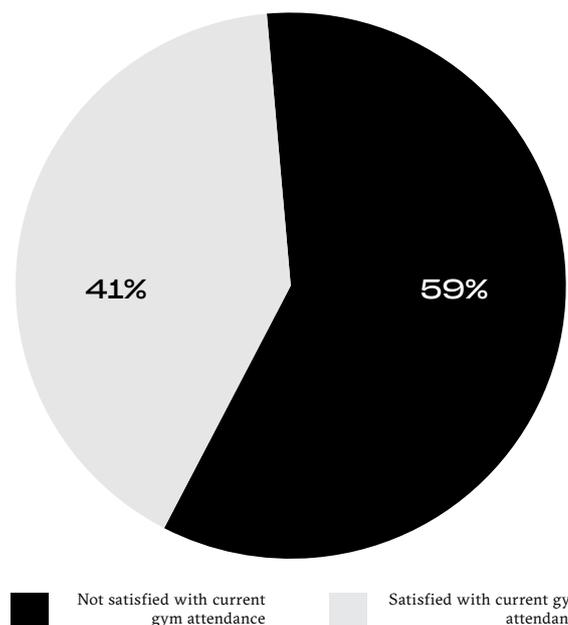


Figure 9: Les Mills Global Fitness Survey 2019: Satisfaction with gym behavior

Les Mills is the global leader in group fitness and the creator of 20 group fitness programs, including BODYPUMP™ (weights), BODYCOMBAT™ (martial arts), RPM™ (indoor cycling), LES MILLS GRIT™ (30-minute high-intensity interval training) and the revolutionary immersive cycle experience, THE TRIP™. LES MILLS workouts are delivered by 140,000 certified instructors in 20,000 clubs across 100 countries and are available for at-home exercisers via the LES MILLS™ On Demand streaming platform. Every week, millions of people get fit with Les Mills.

From member insights, to marketing resources, member acquisition blueprints and onboarding strategies, Les Mills can partner with you to put your facility on the path to long-term success.

A more detailed and comprehensive analysis of this research is available exclusively to Les Mills partners. Contact your Customer Experience Manager to access your Global Fitness Insights 2019 Partner Report.