LesMILLS
GEN Z FITNESS:
CRACKING THE CODE

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SECTION 1

WHO ARE GEN Z?

And what do they want from a workout?

UNLOCKING THE GEN Z MARKET

Often caricatured as smartphone-obsessed social media addicts, Gen Z are not to be underestimated.

While it's true Gen Z spend more time **(55% use phones 5+ hours per day[1])** swiping than their elders; they're also more diverse, socially-conscious, digitally-savvy and health focused than any generation that's gone before. And they have a much more enlightened view on fitness.

They grew up watching their parents yo-yo diet, follow fads, and flit from one short-lived fitness kick to another. But for Gen Z, health and fitness is a far more holistic experience. Meet the generation working out for mental wellness, intrinsic motivation and the chance to be part of a community.

Having helped shape a culture where fitness is a social media mainstay, Gen Z are frequently dubbed 'Generation Active' – and 30% of them are already using fitness facilities. But this is just the tip of the iceberg.

A further **50% of Gen Z want to work out regularly, but need help getting started.** Nurturing these swing voters into long-term fitness lovers will require an intimate understanding of the challenges they face. But for fitness brands that lean in and meet the nuanced needs of this cohort, the opportunities are endless.

So what will it take to unleash an entire new generation of fitness fans? Gen Z are all about cold, hard facts, so we spoke to 4,000 of them around the world (from the US, UK, Germany and China) to conduct the largest ever study of Gen Z fitness habits.

Putting the 'NZ' in Gen Z, this Les Mills report offers a comprehensive picture of what Gen Z want from a workout and how to engage them. From the trends making them move, to the barriers holding them back, we surface the key insights every brand should know. As the next big global spending power, understanding Gen Z's motivations, goals and values is key to earning their loyalty during the critical window in their 20s when most people decide their preferred long-term fitness provider. So let's dive in to crack the code on Gen Z fitness and start shaping the most active generation ever.

GEN Z STAT BOX

- Born: 1997 – 2012
- Largest generation ever
- Gen Z have US$360bn in disposable income
- 30% already using a gym
- US$95 median monthly spend on exercise
- 40% use TikTok as their primary search engine

1 – Pew Research Center

GEN Z HEADLINE STATS

36%

ARE EXERCISING REGULARLY, WHILE 50% WANT TO START

30%

OF GEN Z ARE REGULARLY USING FITNESS FACILITIES

92%

OF GYM USERS DO AT LEAST HALF THEIR WORKOUTS IN THE GYM

72%

OF REGULAR EXERCISERS ARE DOING BOTH GYM AND OUT OF GYM WORKOUTS

44%

OF REGULAR EXERCISERS USE PAID FITNESS APPS OUTSIDE OF THE GYM

81%

OF ALL GYM GOERS ARE DOING GROUP WORKOUTS

MAPPING THE GEN Z OPPORTUNITY

Based on their current fitness outlook, Gen Z can be categorized into 4 groups.

With the exception of the ‘no interest’ group, this report will explore each in further detail.

The 50% of Gen Z who want to start exercising (36% who plan to start + 14% who want to start) are referred to as ‘The Untapped Market’ and are covered in Section 3 (page 23).

36% OF GEN Z REGULARLY EXERCISE (WORK OUT AT LEAST ONCE PER WEEK)

36% PLAN TO START EXERCISING IN THE NEXT 3 MONTHS

14% WANT TO START EXERCISING, BUT FEEL TOO INTIMIDATED

14% HAVE NO INTEREST IN EXERCISING

SECTION 2

GEN Z WORKOUTS DECODED

Dig in to discover Gen Z’s favorite fitness traits

GEN Z TRAINING SNAPSHOT

#1	GEN Z'S #1 REASON TO WORK OUT IS TO BECOME FITTER
72%	OF REGULAR EXERCISERS ARE DOING BOTH GYM AND OUT OF GYM WORKOUTS
50%	OF ALL GEN Z GROUP WORKOUT PARTICIPANTS DO STRENGTH CLASSES
44%	WORK OUT TO REDUCE STRESS
30%	OF GEN Z REGULARLY USE FITNESS FACILITIES
36%	OF GEN Z ARE EXERCISING REGULARLY

“I WORK OUT BECAUSE I LOVE HOW IT MAKES ME FEEL MENTALLY AND PHYSICALLY STRONG”

— KIMBERLY, 26

✨🌻

GENERATION ZEN

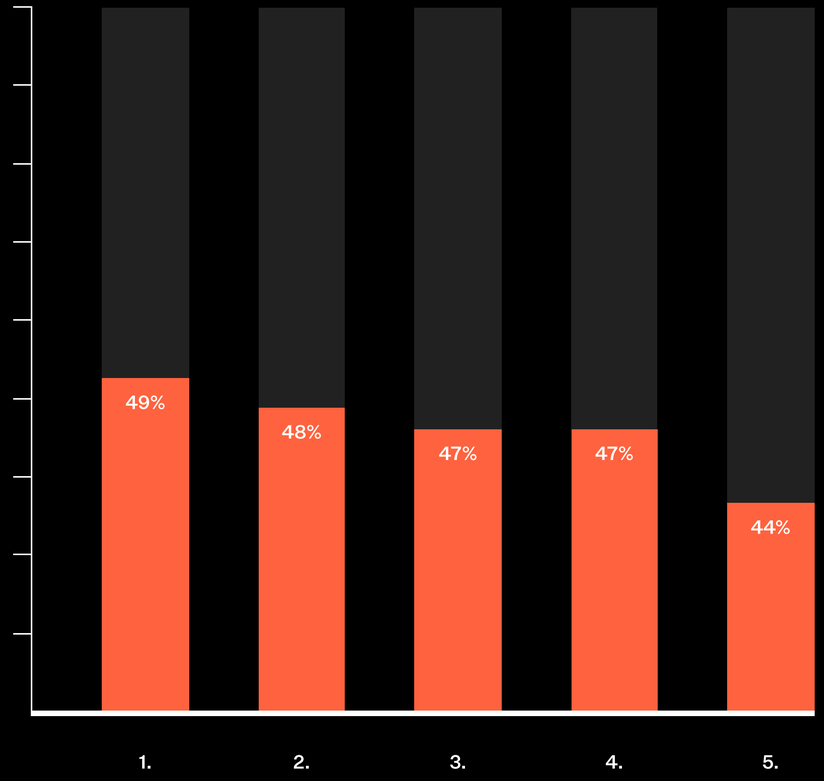
Catch them at the squat rack; making fun mid-workout TikToks; or leaning into sun salutations on their balconies. Gen Z's habits are shaping the current fitness landscape, but how much do we really know about them?

As a generation that places value on a brand's values as well as its products – **73% of Gen Z only buy from brands they believe in**[1] – their motivations to work out are similarly holistic in nature. Social distancing might be optional these days, but the legacy of challenges to their mental health persists. Over a third of Gen Z say the pandemic negatively impacted their physical health, but that rises to **57% when asked about the impact on their mental health.**[2] This is reflected in Gen Z's reasons for working out, with four of the top five being tied to intrinsic aspects of wellness.

The holistic benefits of activity are more significant than ever for Gen Z. That said, they still want to look good, with **47% working out to improve their appearance.**

TOP 5 REASONS FOR WORKING OUT:

1. Be fitter
2. Get healthy
3. Improve appearance
4. Feel better/feel good
5. Reduce stress



[1]Edelman Trust: The Cascade of Influence (2022), [2]Mindbody Fitness Report (2022)

MONEY MATTERS

This generation has cash to spend on the things that matter, but they want value and know the importance of making their wallets work as hard as their quads.

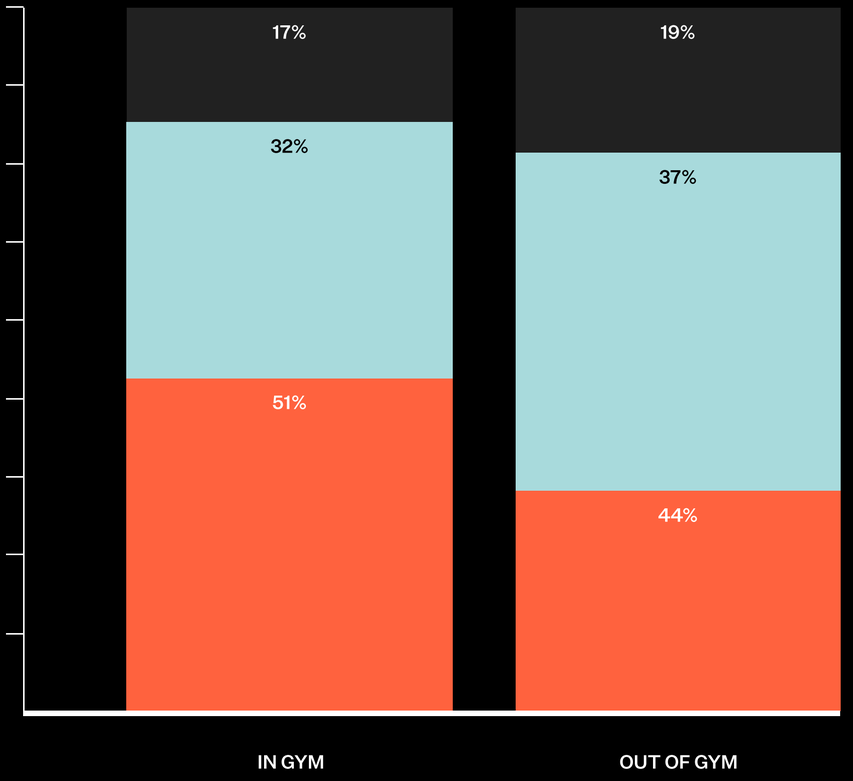
Their median monthly spend on fitness is US$95 and they're **77% more likely to splurge on fitness than their parents.**[1]

51% of regular exercisers are already using a paid fitness app to guide their workouts in the gym and a further 32% would consider using one.

Nearly half (44%) of those exercising outside of the gym are using a paid app, and a further 37% are considering using one.

REGULAR EXERCISERS' APP USAGE

- **Already using a paid fitness app to guide their workouts in the gym**
- **Are considering using a paid fitness app**
- **Wouldn't consider using a paid fitness app**



[1]McKinsey Future of Wellness Survey (2022)

HERE, THERE AND EVERYWHERE

Winning with Gen Z demands a flexible fitness offering: **72% of regular exercisers are working out both in the gym and outside of it.**

Strike the right balance and Gen Z will stick around: **61% of members have been with their facility for between 6 months and two years.**

They also want flexibility when it comes to group workouts. **68% of these are taking place in the gym**, with participants citing the energy of the group and the music as key motivators.

The remaining **32% are happening outside of gym.**

CHOICE IS QUEEN

For gym operators, providing plenty of choice for Gen Z is key to getting them through the front door.

30% of Gen Z are already regularly working out in fitness facilities – a far higher figure than the total adult population, which typically ranges between 15-25%, depending on the market.

Of those working out regularly, **64% strongly agree they like to choose different workouts**, as well as discovering new ones.

What's more, with **50% of Gen Z yet to start regularly exercising**, there's a golden opportunity to engage many more young people with fitness solutions.

GEN Z INSIGHT

"I prefer lifting at the gym, but I also love boxing and whenever the weather is nice I'll be running along the lakefront. Then if I'm ever pressed for time, I'll do a home workout.

So that's either through an app or I'll pull up a quick 30-45 minute video on YouTube and follow along."

MIGHTY MULTIPURPOSE GYMS

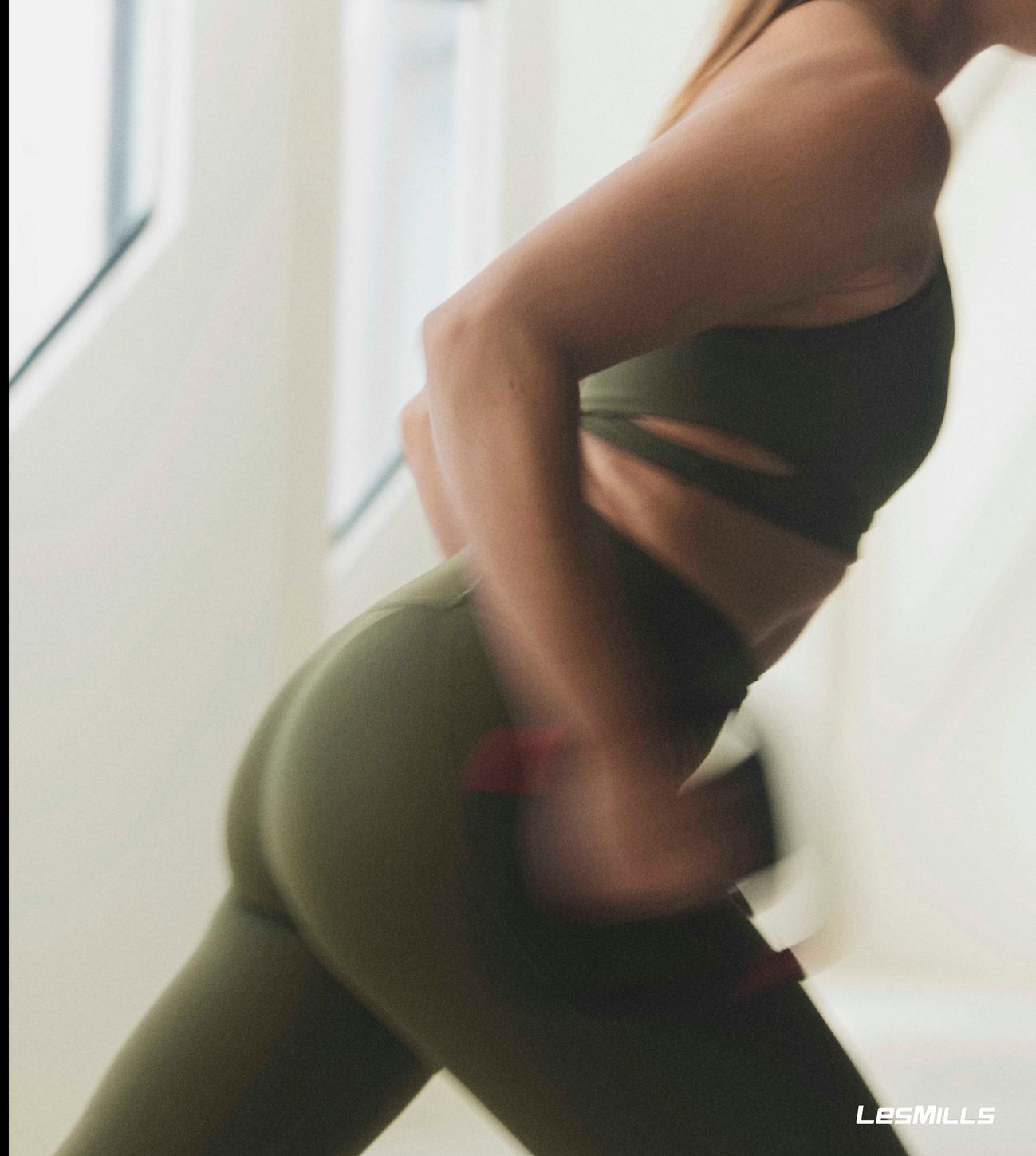
Multipurpose facilities – typically gyms with free weights, cardio equipment, group fitness studios and other amenities – are where **91% of Gen Z gym-goers work out, reveling in the range of options they can enjoy.**

Having spent extended periods of time away from friends during the pandemic, there's strong Gen Z appetite for working out with others in social settings. Of all regular exercisers, **82% are getting their sweat on in the gym** (up from 64% in 2021[1]) as Gen Z continues its ascension to becoming the dominant fitness demographic.

GEN Z INSIGHT

"After a workout, I wanna feel smashed, but in a way that I feel good. Good for the work that I put in. Group training helps me push myself in the right direction.

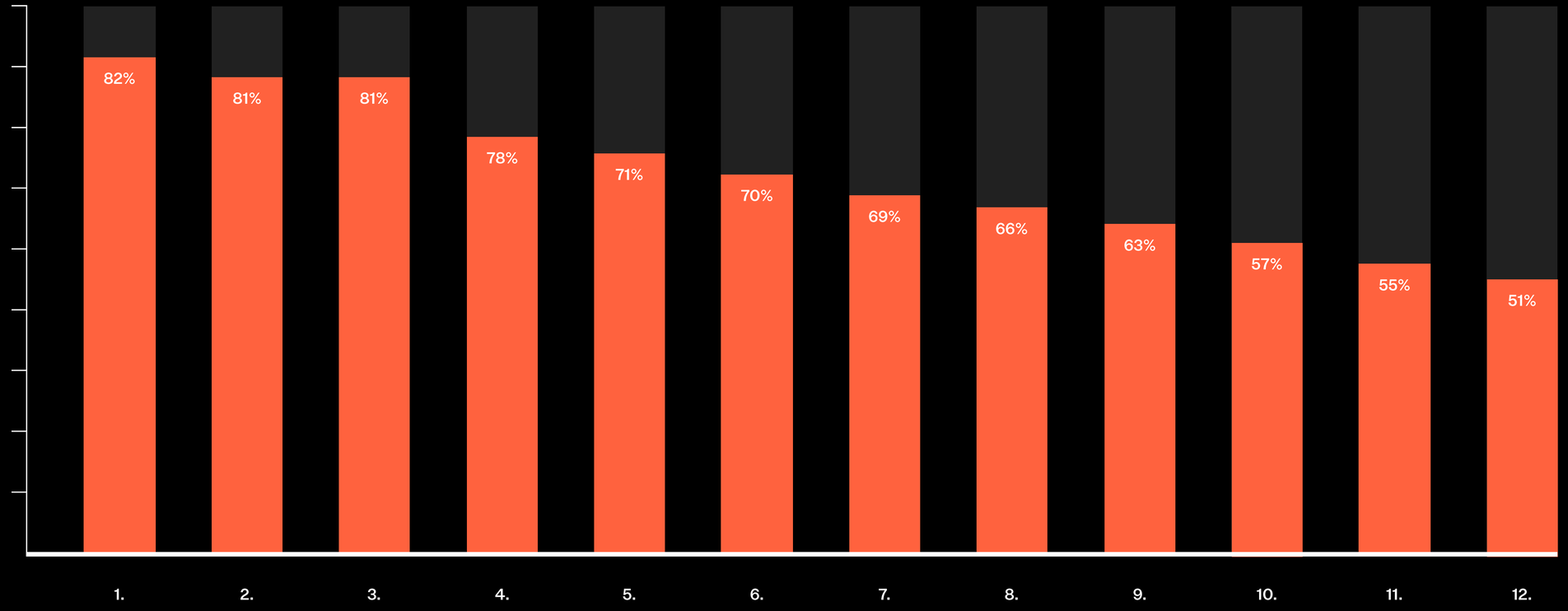
That beautiful feeling of power makes me feel euphoric."



[1]Les Mills Global Fitness Report (2021)

ACTIVITIES BEING DONE IN THE GYM

1. Pin-loaded and/or cable machines
2. Group fitness workouts/classes
3. Free weights (e.g. dumbbells, barbells, plates etc)
4. Cardio machines (e.g. treadmills, bikes etc)
5. Body weight training
6. Functional training (e.g. CrossFit style workouts)
7. Personal training
8. Small group training
9. Pilates (using reformer)
10. Yoga
11. Mat Pilates
12. Swimming



SHOW THEM WHAT'S ON OFFER

Gen Z love the choice available in multipurpose facilities, but many have trouble knowing where to start, which may be why user-friendly pin-loaded machines feature at the top of the in-gym activities chart – **used by 82% of gym-goers.**

This was closely followed by **group workouts and free weights, which both engage 81% of Gen Z gym-goers.**

Helping Gen Z get the most from their workouts by taking them through a rigorous onboarding process provides much-needed support and helps them to discover all of the choices a facility has to offer.

By finding the activities they enjoy most, Gen Z are best-equipped to achieve their goals and graduate from gym newbies into long-term, loyal members.

GEN Z AND GROUP WORKOUTS

As a demographic who value connection and community, it's no surprise that Gen Z are drawn to the supportive environment of group workouts. **43% of regular exercisers enjoy the energy of training with a large group**, while a quarter are drawn to the guidance provided by an Instructor.

Strength Training – 2022's most popular workout[1] is also driving Gen Z into the studio, with their love of weights lifting the category to new heights. In 2021, it was the 10th most popular group workout for Gen Z, with HIIT taking the number one crown[2].

For a generation that grew up on social media and have a passion for inclusivity, it's no surprise hashtags like #girlswholift are inspiring growing numbers of young women to take up strength training. The TikTok hashtag had a **whopping 10.6BN views as of May '23.**[3]

But they're also paying close attention to their wider wellness, with recovery and mindfulness following close behind:

35% ARE DOING STRETCH/MOBILITY

33% ARE DOING YOGA

50% ARE DOING STRENGTH TRAINING

GEN Z INSIGHT

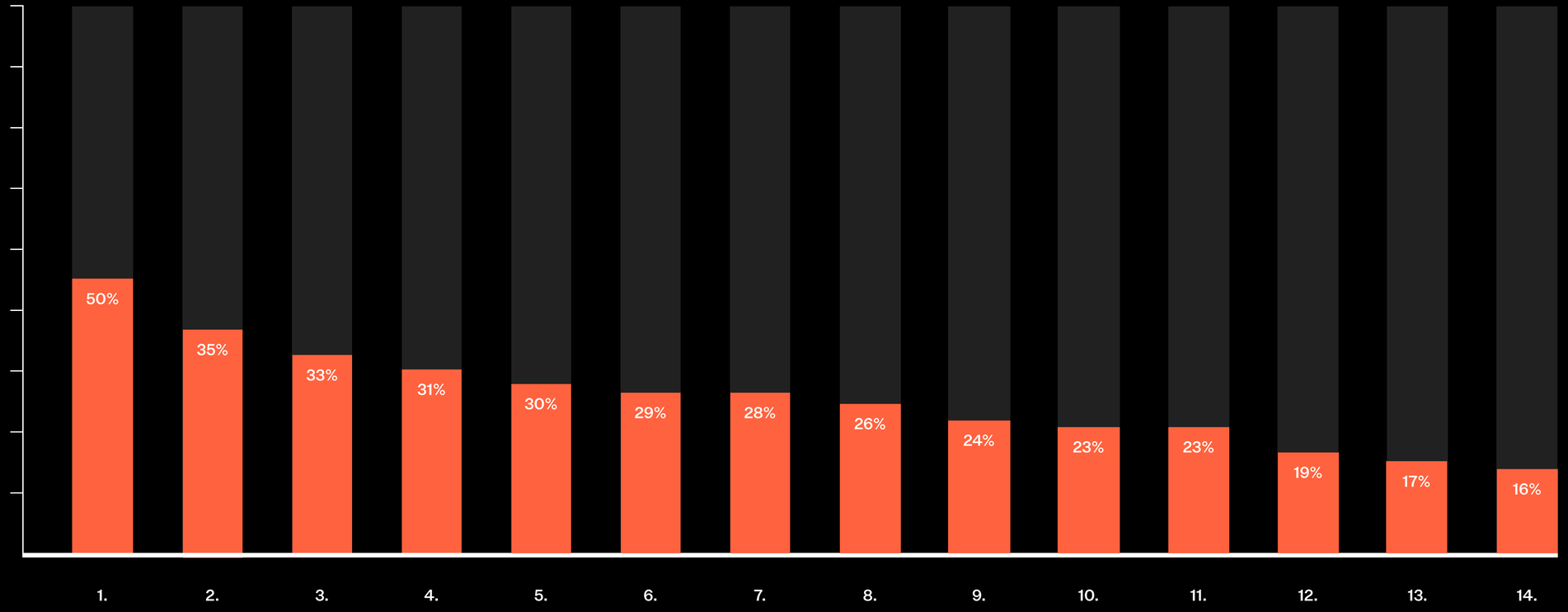
"What I love about group fitness is that it it motivates you to push yourself to keep up with the rest of the class.

Sometimes we tell ourselves we're tired when we actually still have gas left in the tank. It's also a great way to be a part of a community."

[1]ClassPass & Mindbody Look Back Report (2022), [2]Les Mills Global Fitness Report (2021), [3]Tiktok May 2023

MOST POPULAR GROUP WORKOUT FORMATS

1. Strength training
2. Stretch/mobility
3. Yoga
4. Boxing
5. Core conditioning
6. Functional training
7. Other cardio/aerobics
8. Indoor cycling
9. Martial arts
10. Dance
11. HIIT (High Intensity Interval Training)
12. Step aerobics
13. Pilates (with reformer)
14. Mat Pilates

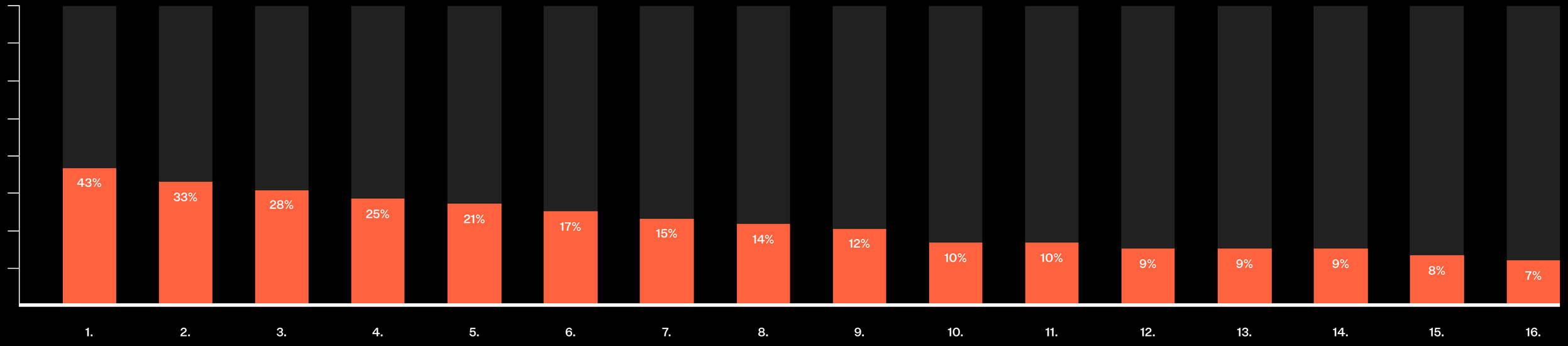


“MY FAVORITE ELEMENT OF A GROUP WORKOUT IS THE MUSIC. WHEN IT’S REALLY HYPED IT MAKES YOU FEEL LIKE YOU’RE PART OF SOMETHING REALLY COOL AND BIG.”

— MILLY, 25

🎹🎶

WHAT GEN Z LIKE MOST ABOUT GROUP WORKOUTS



1. I enjoy the energy of a big group
2. Like working out to great music
3. Quick results
4. Receiving guidance from Instructors
5. Classes are not too crowded
6. Safety in numbers
7. I like the social interaction
8. The scheduled times are convenient
9. They're fun and make me feel good
10. I like the studio environment
11. There's a wide range of workouts to choose from
12. Classes are value for money
13. They make working out easier
14. I like the Instructors
15. More motivating than other types of workouts
16. I like the style/structure/ method of exercise

SECTION 3

THE UNTAPPED MARKET

50% of all Gen Z want to exercise regularly but need help getting started. What will it take to crack the code and unlock this massive opportunity?

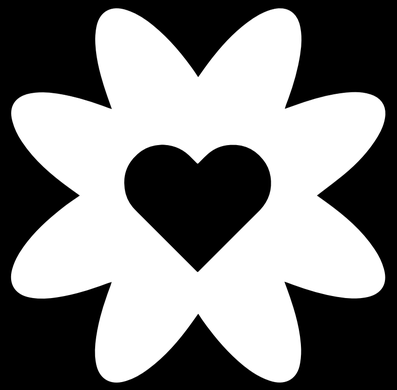
THE UNTAPPED MARKET'S PLANNED ROUTE TO FITNESS

68%

of those not yet working out plan to begin at home

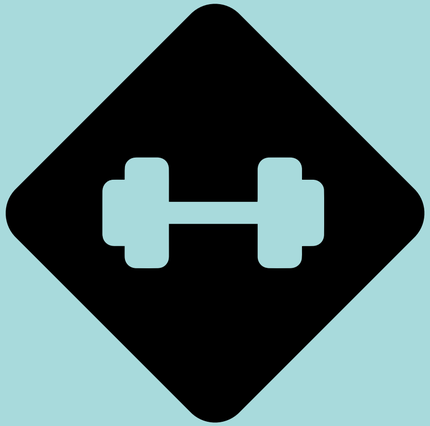
51%

want to start exercising to get healthy



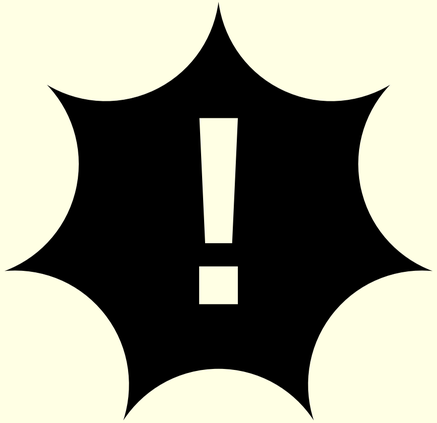
51%

plan to join a gym



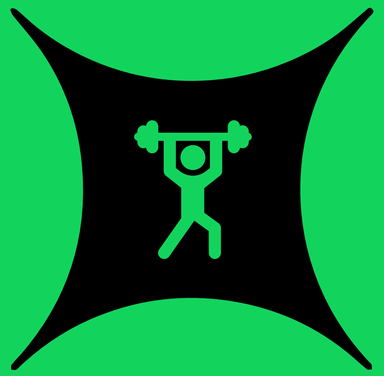
22%

find gyms intimidating



31%

of those ready to start group workouts are drawn to the guidance of an Instructor



THE UNTAPPED MARKET: WHAT THEY SAY...

“I'D LIKE TO START EXERCISING BECAUSE I WANT TO BE HEALTHY AND BUILD MY MUSCLES”

“WHEN IT COMES TO EXERCISE, I WISH IT COULD BE MORE AVAILABLE TO BEGINNERS”

“I WANT TO START TO EXERCISE TO GET TO A HEALTHY WEIGHT AND TO STOP BEING SO ANXIOUS ABOUT MY BODY”

“I WISH I DIDN'T HAVE TO EXERCISE ALONE. WHILE EXERCISING I HOPE TO GET MORE CONFIDENT IN MYSELF.”

THE UNTAPPED MARKET: NEED TO KNOW

WHAT THEY'RE THINKING

50% HALF OF ALL GEN Z ARE EAGER TO START EXERCISING (THE UNTAPPED MARKET)

36% PLAN TO START EXERCISING IN THE NEXT 3 MONTHS; A FURTHER 14% WANT TO START EXERCISING BUT FEEL TOO INTIMIDATED

51% OF THE UNTAPPED MARKET PLAN TO JOIN A GYM

55% OF THE UNTAPPED MARKET WOULD BE WILLING TO TRY A PAID APP

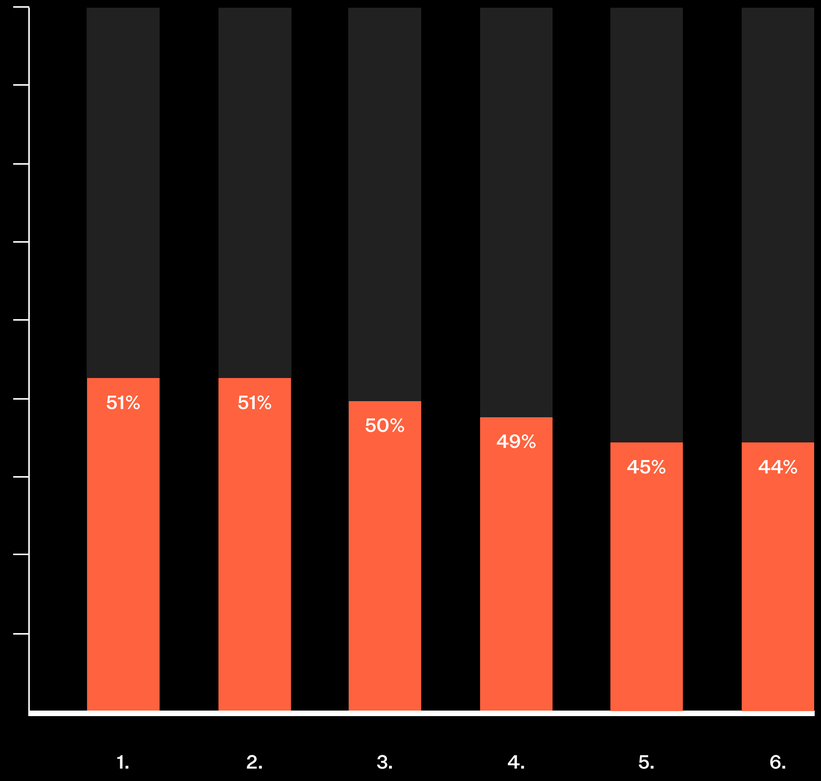
68% TWO-THIRDS OF THE UNTAPPED MARKET PLAN TO START WITH HOME WORKOUTS

THE UNTAPPED MARKET: KEY MOTIVATIONS

This group exists in a fitness mindset where working out is seen as hard work and they are slightly more extrinsically motivated (e.g. they want to lose weight or get in shape) than regular exercisers.

REASONS TO START EXERCISING

1. Be fitter
2. Get healthy
3. Improve appearance
4. Feel better/feel good
5. To get in/maintain shape
6. Reduce stress



GATEWAY WORKOUTS

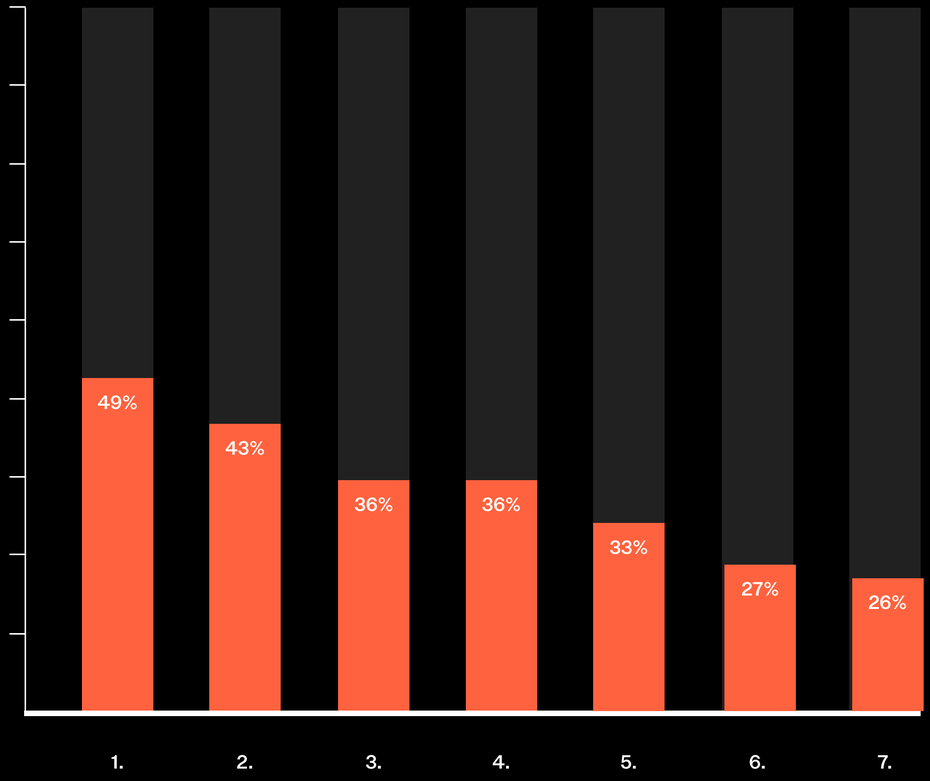
As a generation with a more-rounded outlook on movement and goal setting, supporting Gen Z towards becoming regular exercisers requires a more gradual approach.

Topping their list of planned activities are Walking and Running – options that are easy and accessible, requiring little to no knowledge or prior expertise.

But activities that are easy to get into can be equally easy to fall out of love with – and therein lies the problem. Although less intimidating, activities like Walking and Running often fail to deliver motivation, sociability, connection or community – things that Gen Z thrive on.

HOW THEY PLAN TO START

1. Walking
2. Running
3. Swimming
4. Cardio machines
5. Free weights
6. Yoga
7. Group fitness classes



MAKING WORKOUTS STICK

To help Gen Z maintain exercise habits, they need to see their tastes reflected in a format that feels current, achievable, enjoyable, and offers the sense of community that will keep them coming back.

A quarter (27%) haven't joined a gym because it's perceived as being expensive. They are open to paying for an app, though **nearly half (48%) state that cost is ta barrier to working out or exercising.**

There's also a real lack of confidence: **22% say they have no one to workout out with,** find gyms intimidating, and don't know what they're doing.

For fitness facilities, possible ideas to nurture this audience include offering free walking or running groups to help potential members meet other members. This helps to bridge the confidence gap and get them moving with activities they've indicated they're confident and comfortable with.

22%

SAY THEY HAVE NO-ONE TO WORKOUT OUT WITH

22%

FIND GYMS INTIMIDATING

22%

DON'T KNOW WHAT THEY'RE DOING

OVERCOMING GYMTIMIDATION

‘Gymtimidation’ can be a stumbling block for Gen Z when starting their exercise journey, with many among the untapped market reporting a desire for greater support to set them up for success. Introducing younger members to activities based around social interaction and guided expertise is great way to overcome these barriers.

The community-driven environment of the group workout studio, where social bonds are formed, provides building blocks to gain confidence and boost engagement.

Tapping into the support offered by Instructors and the collective energy of working out alongside like-minded participants is key to creating an irresistible workout experience that keeps people coming back. Of those considering group workouts, their top three drivers are:

41%

LIKE WORKING OUT TO GREAT MUSIC

31%

LIKE RECEIVING GUIDANCE FROM INSTRUCTORS

38%

ENJOY THE ENERGY OF A BIG GROUP

GEN Z INSIGHT

“When it comes to exercise, I wish I had more guidance, without the worry of embarrassment”

WHAT MAKES A GYM APPEALING TO THE UNTAPPED MARKET?

39%	AFFORDABLE
38%	CONVENIENT LOCATION
37%	GOOD ATMOSPHERE
34%	WIDE RANGE OF EQUIPMENT
32%	24-HOUR ACCESS
31%	OFFER LOTS OF DIFFERENT WAYS TO WORKOUT
23%	FRIENDS GO THERE

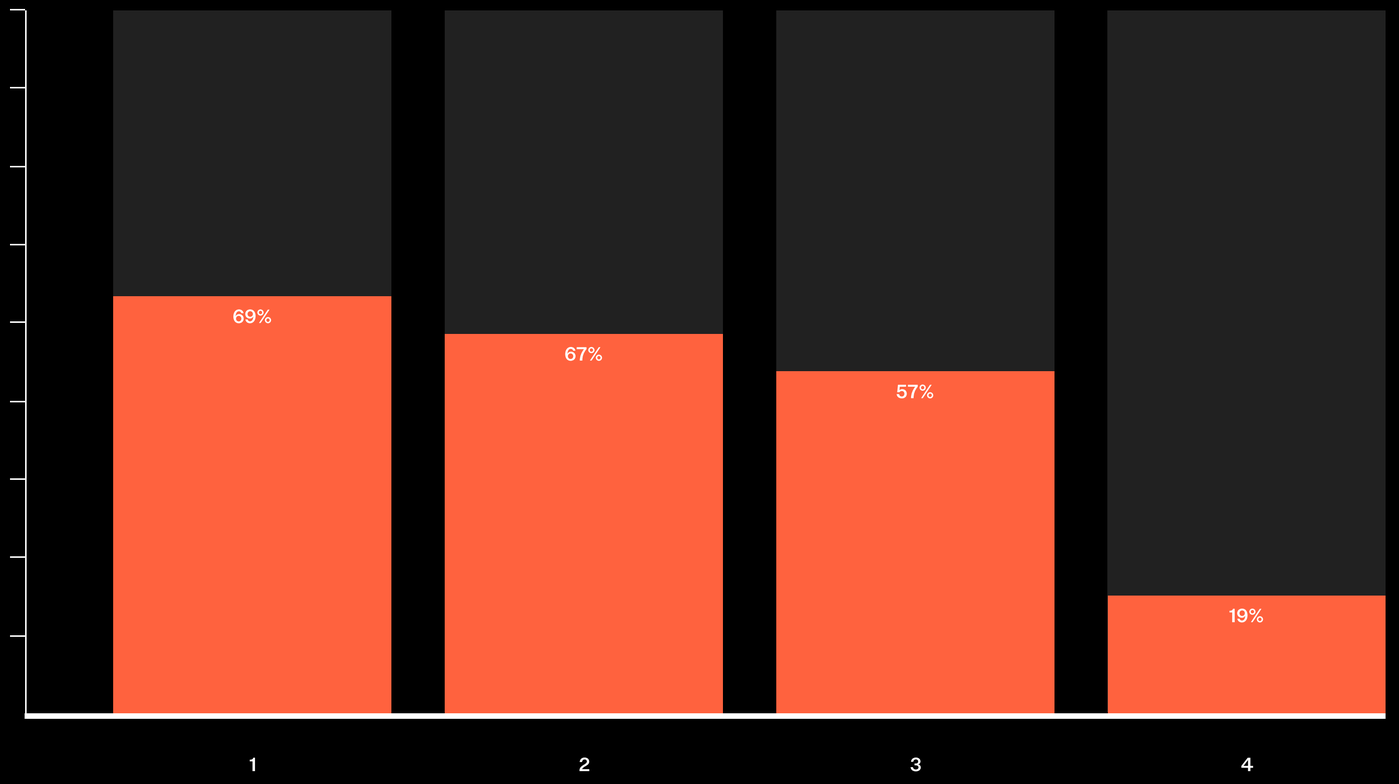
WHAT ARE THE UNTAPPED MARKET EXPECTING FROM A GYM?

1. **ACCESSIBILITY**
(Including: Location, affordable, good deals and 24hr access)

2. **SOCIABILITY AND COMMUNITY**
(Including: Friends attending, good atmosphere, feeling part of community, motivates to be around others, for people like me)

3. **VARIETY OF FITNESS OFFERING**
(Including: Offering group fitness classes, wide range of equipment, lots of different ways to workout, having online/livestream offering)

4. **GUIDANCE**
(Including: Fitness class Instructors and personal trainers)



ADIDAS SPORTS
CLUB

SECTION 4

THE AGE OF OMNIFITNESS

As the first generation of digital natives, cracking the code to getting Gen Z moving requires a multi-channel approach that meets them on their terms.

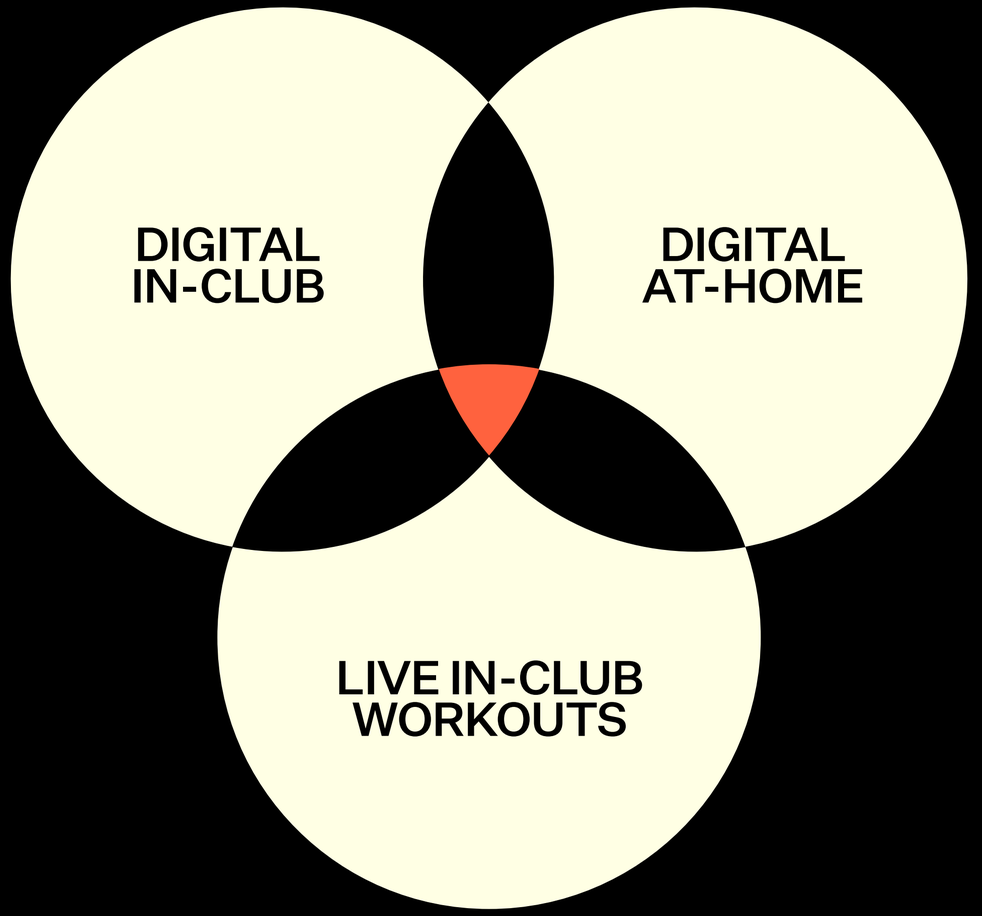
WHAT IS OMNIFITNESS?

Omnifitness means delivering live and digital workout options to reach exercisers anywhere, anytime.

Having grown up with Amazon Prime and Uber Eats at their fingertips, Gen Z expect flexible solutions so they can work out wherever, whenever and however they want.

Omnifitness has become a basic expectation among Gen Z exercisers and those considering starting their journey.

▼ OMNIFITNESS



“I HAVE A VERY BUSY LIFE BUT FOR ME, WORKING OUT MAKES ME FEEL LIKE I’M DOING SOMETHING FOR MYSELF EVERY DAY.”

— LESHEGO, 25

💫💛

THE OMNIFITNESS OPPORTUNITY

82%

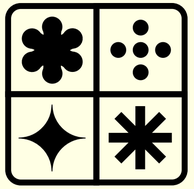
OF REGULAR EXERCISERS WORK OUT IN A GYM/PAID FITNESS FACILITY

72%

OF REGULAR EXERCISERS ARE DOING BOTH IN AND OUT OF GYM WORKOUTS

68%

OF REGULAR EXERCISERS WORK OUT AT HOME

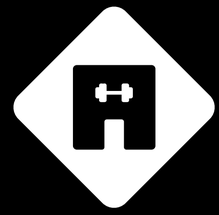


64%

OF REGULAR EXERCISERS LIKE TO CHOOSE DIFFERENT WORKOUTS INSTEAD OF STICKING TO JUST ONE

60%

OF REGULAR EXERCISERS DO OUTDOOR WORKOUTS



25%

OF ALL GEN Z ARE PLANNING TO JOIN A GYM

THE GENERATION WHO CAN HAVE IT ALL

Gen Z prefer working out in a motivating environment, with **92% of gym users doing at least half of their workouts in the gym**. But they still do plenty outside the gym, with **72% of regular exercisers doing both in and out of gym workouts.**

By combining live workouts with a digital solution, fitness providers can join the dots to support Gen Z's preference for choice, social connection and workouts on demand. Apps that host the full suite of digital workouts make keeping fitness routines easy on days when getting to the gym isn't.

And the exercisers who combine online and in-club workouts are by far the most active – meaning they're less likely to leave their gym.

3.3

GYM ONLY USERS DO ON AVERAGE 3.3 GYM WORKOUTS A WEEK

3.1

OUT OF GYM ONLY EXERCISERS DO ON AVERAGE 3.1 WORKOUTS PER WEEK

5.5

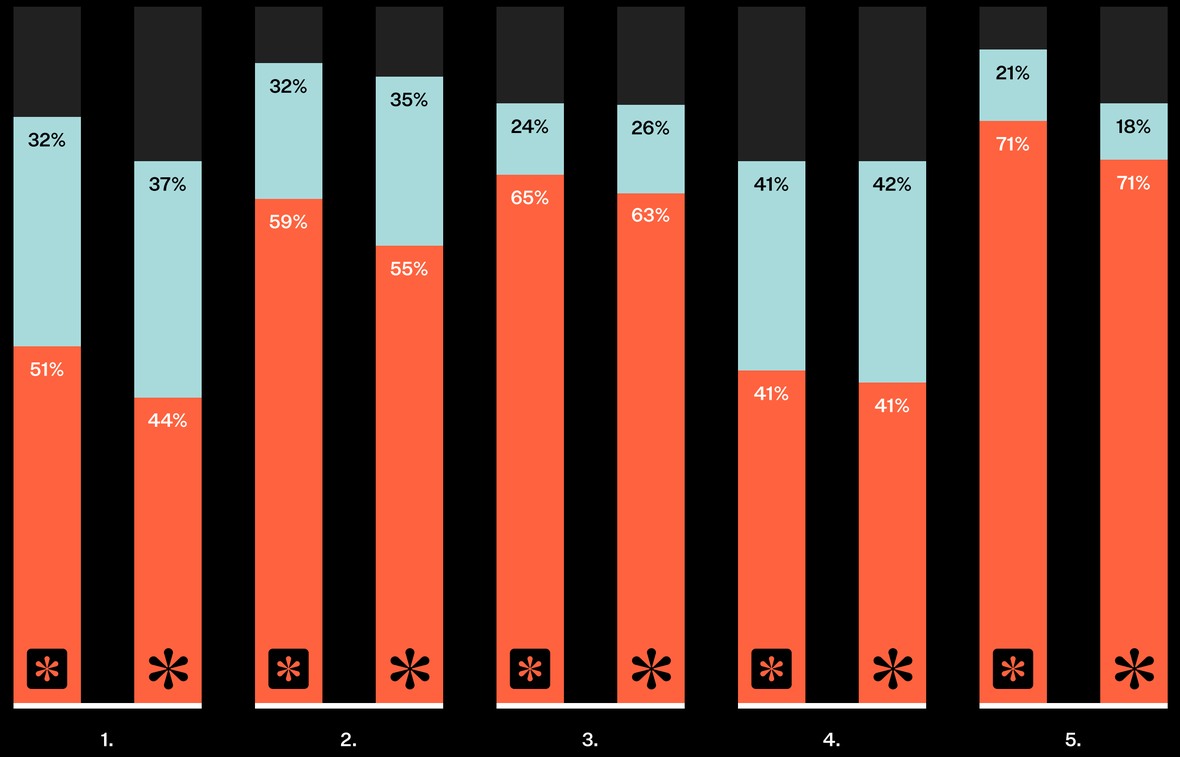
IN AND OUT OF GYM EXERCISERS DO AN AVERAGE OF 5.5 WORKOUTS PER WEEK – MEANING THEY DO 67% MORE WORKOUTS THAN GYM ONLY USERS

3+

IN AND OUT OF GYM EXERCISERS ARE 40% MORE LIKELY TO HAVE BEEN A GYM MEMBER FOR 3+ YEARS COMPARED TO GYM-ONLY EXERCISERS

WILLINGNESS TO USE APPS AND DIGITAL FITNESS PRODUCTS FOR IN AND OUT GYM WORKOUTS

1. Paid fitness apps or online / digital options
2. Free fitness apps or online options (not including YouTube)
3. YouTube workouts
4. Preferred paid fitness influencer's app (or program)
5. Preferred free fitness influencer's app (or program)



- CURRENTLY USING
- WOULD CONSIDER USING
- IN GYM
- OUT OF GYM

DIGITAL AND APP-BASED TRENDS

For the first generation of digital natives, having digital solutions to support their fitness goals is a basic expectation.

Gen Z are keen to hold themselves to account with their training: **half say using tech is important to monitor their progress and track workouts.** As a highly connected cohort, digital engagement with their peers features strongly, too.

And this doesn't just apply to home workouts:

51%

OF REGULAR EXERCISERS ARE ALREADY USING A PAID FITNESS APP TO GUIDE THEIR WORKOUTS IN THE GYM AND A FURTHER 32% WOULD BE WILLING TO TRY THEM

44%

OUTSIDE OF THE GYM, 44% OF REGULAR EXERCISERS ARE USING A PAID FITNESS APP AND A FURTHER 37% ARE WILLING TO TRY ONE

59%

NO-COST OPTIONS ARE ALSO POPULAR, WITH 59% OF REGULAR EXERCISERS USING A FREE APP OR ONLINE OPTION TO SUPPORT THEIR TRAINING, WITH 32% WILLING TO CONSIDER THEM

53%

OF REGULAR EXERCISERS LIKE TO SHARE THEIR PARTICIPATION AND PROGRESS WITH OTHERS

UNDER THE INFLUENCE

But when it comes to fitness apps, Influencers are living up to their name by holding the most sway over Gen Z regular exercisers.

71% are using a fitness Influencer's free digital platform inside the club, while 76% look to them for guidance at home. But this doesn't have to be a global megastar like Kayla Itsines.

Gen Z consider an Influencer to be anyone who represents a brand they're interested in – meaning gyms have significant opportunities to amplify their own star Instructors to drive awareness and win fans.

Over half **(55%) of Gen Z agree that promoting trainers and Instructors as local fitness influencers is a high impact way to create a strong sense of community.**[1]

Showcasing rockstar Instructors offers the engagement Gen Z are looking for, while highlighting the credibility of a gym's brand and the science underpinning its programming can help it to cut through the masses of online misinformation and engender trust.

[1]ABC Financial 2023

SECTION 5

KEY TAKEOUTS FOR WINNING WITH GEN Z

“MY WORKOUT ICK IS GRUNTING. SORRY TO ALL MY GRUNTERS OUT THERE BUT GRUNTING IS CRINGE. LUCKILY WE HAVE MUSIC!”

— MENO, 22

🎧💥

OMNIFITNESS IS KEY TO WINNING THEM OVER

Feeling strong and looking healthy are the intrinsic motivators driving this generation to choose training modalities that support their long-term health and wellbeing. Gen Z are the largest generation ever and **50% of our survey respondents say they're ready to enter the fitness market**, representing a golden opportunity for brands to win new fans.

As the stats show, Gen Z love choice, so embracing Omnifitness and delivering a range of workout options is key to winning them over. Among non-exercisers, **68% want to start working out at home first**, so being able to build their confidence with high-quality digital options is essential.

And for those already working out, live workouts in gyms remain the ultimate experience, but digital options to augment this have become a basic expectation.

Given those who exercise both in and out of gym do **67% more workouts than gym-only exercisers**, it's clear that Omnifitness represents the winning formula for all parties.

PLUG IN TO THEIR HABITS

YOU WON'T CATCH GEN Z MAKING AN IMPULSE BUY ON THE FLY.

Gen Z's affinity with their phones means they use a wide range of online sources to scope out purchases thoroughly before payment. If they're checking out a product, more than **50% of Gen Z primarily rely on a brand's website to research it before making a purchase**, with a further 40% looking at online reviews and 29% taking to social media[1].

Surprisingly, Gen Z see YouTube as crucial to their spending decisions: **almost half (47%) say they use it to research products before buying[2].** Given Gen Z spend 5 hours a day on their phone, it goes without saying that marketing efforts should be focused on social media. And the smart way to take the strain out of marketing efforts is to make it easy for them to do the work for you.

Consider creating branded feature walls where they can pose for post-workout victory selfies, along with social filters and stickers to augment your brand's digital presence.

55% of Gen Z use their phone for more than 5 hours a day[3] and spend 8 hours a day online[4]. Two thirds of Gen Z regular exercisers are doing workouts outside of the gym, with many working out using their phone.

The smartphone is an omnipresent part of their life, so providing accessible and engaging digital workouts is an ideal route to amplify your brand's presence and drive meaningful connection.

Want to be found? Meet them where they are. With 48M Gen Z on TikTok[5] in the US alone, researching trending hashtags and creating content that fits their values is a great way to get in front of them.

40% of Gen Z now use TikTok as their primary search engine.

[1]Rakuten Europe, [2]Momentive 2021, [3]Pew Research Center, [4]Datareportal, [5]Forbes.com

THE MAGIC OF THE GROUP

ROCKSTAR INSTRUCTORS ARE THE BEATING HEART OF GROUP WORKOUTS

By putting engaging Instructors front and center of the experience and meeting Gen Z's need for sociability and community, gyms can create loyal members who keep coming back for more and bring their friends with them. Rockstar Instructors are the beating heart of group workouts, and they're not just useful inside the studio.

Asking top Instructors to promote their classes on social media – showcasing content from high-energy, busy workouts – allows those new to the studio to get a glimpse of what to expect, encouraging them to graduate from at-home workouts to the full live experience.

Gen Z prospects are also keen to try taster sessions: **64% agree that offering open days for beginners to try new group workouts** is a great way to create a strong sense of community.[1]

And it's not just those new to group workouts that gyms should target. **35% of all exercisers started going to a live class they first discovered online,[2]** so joining the dots between the studio and a gym's digital offering offers strong possibilities for attracting new fans into the facility.

81%

OF GEN Z ARE TAKING PART IN GROUP WORKOUTS, CITING THE ENERGY OF THE GROUP, FAST RESULTS AND THE GUIDANCE OF AN INSTRUCTOR AS KEY FACTORS ATTRACTING THEM TO THE STUDIO

[1]ABC Financial , [2]Mindbody and ClassPass Mid-Year Wellness Trends Report (2022)

SEEING IS BELIEVING

NOW IT'S TIME FOR YOU TO WIN BIG WITH GEN Z.

Shaping Gen Z perceptions of fitness as a positive experience that nurtures community and social bonds, while offering excellent health benefits, is essential for growing the market.

59% of Gen Z would like to see more optimistic, enjoyable aspects of fitness represented, so it's important this sunny outlook is reflected in fitness marketing that feels welcoming and offers joyful imagery.

So there you have it. Gen Z are now an open book.

We've told you what they're doing, where they're doing it and crucially, the size of the opportunity that awaits.

GEN Z FITNESS: CRACKING THE CODE
RESEARCH DESIGN

METHODOLOGY

- Quotas were set by country to ensure adequate sample sizes to look at individual markets
- Quotas were also set by gender to ensure representation. The weighting used was based on official population figures for gender
- Fieldwork was conducted from 17th March 2023 to 5th April 2023
- A total sample of n=4028 was achieved with a maximum margin of error of +/-1.55%
- The median survey length was 11.25 minutes

COVERAGE

- The survey was conducted across the UK, USA, China and Germany (with translations for the latter two markets)
- Each market was given equal coverage in terms of sample size with a minimum of n=1000 per market

APPROACH

- An online survey with Gen Z consumers (aged between 16 and 26 years) randomly invited by Qualtrics to participate. Qualtrics are a leading enterprise survey technology solution. They partner with over 30 online panel providers to supply a network of diverse, quality respondents to their worldwide client base
- Panellists are incentivised for every survey they qualify for and complete

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GEN Z FITNESS:
CRACKING THE CODE

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