

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Fitness facilities and gym memberships have increased in tandem in the last decade, showing that Americans have an increased interest in getting fit. However, even though more are reportedly exercising regularly, obesity rates continue to climb, indicating that adults haven't been able to offset poor diets with exercise alone."

- Dana Macke, Senior Lifestyle and Leisure Analyst

# This report looks at the following areas:

- Most adults are already regular exercisers
- Low maintenance exercises have the greatest appeal
- Exercisers have an "all or nothing" attitude

Fitness facilities and gym memberships have both grown steadily over the past 10 years, demonstrating that Americans increasingly see the value in exercise. Three in four adults say they exercise regularly, even though this may mean they have simply adopted a low investment activity like fitness walking. For walkers, runners, swimmers, and bikers alike, one of the greatest exercise challenges is staying motivated throughout the year. This is likely an area where brands can provide the most value for fitness minded consumers.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## **Table of Contents**

#### **Overview**

What you need to know

Definition

#### **Executive Summary**

The issues

Most adults are already regular exercisers

Figure 1: Exercise frequency, July 2016

Low maintenance exercises have the greatest appeal

Figure 2: Types of exercise - Select items, July 2016

Exercisers have an "all or nothing" attitude

Figure 3: Attitudes toward exercise – Select items, Any agree, July 2016

The opportunities

Improving health is the primary goal of exercisers

Figure 4: Exercise motivations - Select items, July 2016

Wearable fitness trackers are the greatest opportunity for new products

Figure 5: Usage of fitness products and services - Select items, July 2016

Seeing is believing

Figure 6: Exercise inspiration - Select items, July 2016

What it means

# The Market - What You Need to Know

More gym facilities leads to more gym members (or the other way around)

Exercise is increasingly popular, but hasn't helped obesity rates  $\label{eq:control} % \[ \frac{1}{2} \left( \frac{1}{2} \right) + \frac{1}{2} \left($ 

Exercisers find value in gym memberships

Time spent on social media leaves little left for fitness

# **The Fitness Market**

# Gym memberships on the rise

Figure 7: Total (US) health club memberships (millions), 2005-15

# Uptick in number of US health clubs to meet burgeoning demand

Figure 8: Total number of (US) health clubs, 2005-15

Figure 9: Popular US health and fitness clubs and approximate number of locations, 2016

## Regular exercise becoming more common

Figure 10: Share who exercise regularly, 2004-16

## **Market Factors**

## Participation in traditional exercise types remains stable

Figure 11: Type of exercise participated in – Every chance I get, 2004-16

Teens may be losing fitness motivation

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Type of exercise participated in – Every chance I get, 2006-16

## High levels of obesity persist

Figure 13: Percentage of overweight and obese Americans, 2000-14

# Nearly half meet standards for cardio fitness, but far fewer lift weights

Figure 14: Percentage of adults aged 18 and over who met the 2008 federal physical activity guidelines for aerobic activity and muscle strengthening activity through leisure-time activity: United States, 1997–2014

#### **Market Perspective**

# Fitness fans more likely to join a gym than stay home

Figure 15: Exercise location, 2004-16

Low-cost gyms count on low attendance

Increased screen time may reduce time allotted to exercise

## Lack of physical education in schools may lead to sedentary adults

Figure 16: Percentage of schools that require students to take physical education, 2010, 2012, 2016

# **Key Trends - What You Need to Know**

Popular fitness trends provide more than just a workout

Exercise that hurts so good

It's okay to try this at home

Road races search for a new audience

New ways to wear wearables

# What's Working?

Fitness trend? Fitness brand? Fitness cult?

Have we reached peak "30-day Challenge"?

# Brands feature the best of fitness, by showing the worst

Figure 17: Bent Not Broken - Full Commercial - Rogue Fitness, July 2016

Figure 18: Under Armour | Rule Yourself | USA Women's Gymnastics, February 2016

Figure 19: Reebok - Find Your Way - Be More Human, July 2016

# Walking helps take away the pain (and the gain)

Figure 20: Sketchers Ad - GOwalk 4

Workouts that are really, really, really short

Streaming platforms bring fitness classes to the living room

Think vertical

Fitness stars on social media

# What's Struggling?

# The "trophy generation" moves away from competitive fitness

Figure 21: US finishers of road races, by distance, 2014-15

Figure 22: Avid runners, April 2004-June 2016

## Team sports lack bench strength

Figure 23: Kids' participation in popular sports, January 2009-December 2015

# What's Next?

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Exercise in a bottle (or pill)

## The new and next in fitness tech

Figure 24: Under Armour | Connected Life, January 2016

#### Physical fitness for mental health

Figure 25: Introducing Headstrong, April 2016

## VR takes fitness to the next dimension

Figure 26: VirZOOM Tutorial - Stampede, December 2015

Figure 27: Widerun - Kickstarter Video, April 2015

Figure 28: Goji Play Demo - How to Set Up Guilt Free Gaming & Get Fit, July 0215

## Back to basics

Figure 29: #NPSUMMIT 4.0, July 2016

## The Consumer - What You Need to Know

## 75% are regular exercisers

Walking is the most common form of exercise

Exercisers are mostly interesting in improving health

Most exercisers make do with little or no fitness equipment

Looking and feeling better motivates healthy habits

Fitness is a priority for more than half

## **Exercise Frequency**

# Three in four exercise regularly

Figure 30: Exercise frequency, July 2016

## Adults aged 25-34 are the most likely to exercise regularly

Figure 31: Exercise frequency – At least once a week, by age, July 2016

## Men cite higher frequency of exercise

Figure 32: Exercise frequency, by gender, July 2016

## High household income correlated with regular exercise

Figure 33: Exercise frequency- At least once a week, by household income, July 2016

Figure 34: Premature mortality rate per 100,000, by household income, 2010

## Lack of motivation prevents some from staying active

Figure 35: Barriers to regular exercise, July 2016

## **Types of Exercise**

# The best exercise in life is free

Figure 36: Types of exercise, July 2016

# Low impact exercise options appeal to women

Figure 37: Types of exercise, by gender, July 2016

# Walking replaces running as people age

Figure 38: Types of exercise - Walking and running/jogging, by age, July 2016

Walking is the overwhelming choice for low-impact exercise

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 39: Types of exercise - Baby Boomers, July 2016

## Team sports may be losing favor to alternative options

Figure 40: Types of exercise - Select items, by iGeneration vs Millennial, July 2016

## Those with low body weight choose high impact activities

Figure 41: FabUplus magazine featuring Jessamyn Stanley cover photo, Fall, 2016

Figure 42: Types of exercise, by BMI category, July 2016

## **Exercise Motivations**

#### When it comes to motivation, health trumps looks

Figure 43: Exercise motivations, July 2016

#### Women exercise for a variety of reasons

Figure 44: Exercise motivations, by gender, July 2016

## Health is a higher priority for older Americans

Figure 45: Exercise motivations - Select items, by age, July 2016

#### Overweight adults exercise with a purpose

Figure 46: Exercise motivations - To lose weight, by BMI category, July 2016

#### **Fitness Purchases**

## A minority of exercisers have plans to purchase new equipment

Figure 47: Usage of fitness products and services, July 2016

## Sport-specific gyms may grow among young fitness fans

Figure 48: Interest in fitness products/services - Sport-specific gym memberships, by age, July 2016

# Young generations see the appeal of the class pass

Figure 49: Interest in fitness products/services - Fitness passes, by generation, July 2016

# BMI has little relationship to fitness purchases

Figure 50: Interest in fitness products/services, by BMI, July 2016

## **Exercise Inspiration**

# Feeling better and looking better create an exercise habit

Figure 51: Exercise inspiration, July 2016

# Women seek out inspiration to stay motivated

Figure 52: Exercise inspiration, by gender, July 2016

# Social support more important for younger exercisers

Figure 53: Exercise inspiration – Social, by age, July 2016

# Setting targets helps with long-term fitness goals

Figure 54: Exercise inspiration, by BMI category, July 2016

## **Attitudes toward Exercise**

# Fitness is a priority, but a regular routine can be hard to maintain $\ensuremath{\mathsf{E}}$

Being in good shape, can mean any shape

No (financial) pain, no gain?

Figure 55: Attitudes toward exercise - Any agree, July 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Men seek a more intense workout

Figure 56: Attitudes toward exercise - Any agree - Select items, by gender, July 2016

## Younger consumers more accepting of all shapes and sizes

Figure 57: Attitudes toward exercise - Any agree - Perception of fitness, by age, July 2016

# High household income related to spending on fitness

Figure 58: Attitudes toward exercise - Any agree - Purchases, by household income, July 2016

#### White Americans need more exercise motivation

Figure 59: Attitudes toward exercise - Any agree - Motivational needs, by race, July 2016

## **Appendix - Data Sources and Abbreviations**

Data sources

Sales data

Consumer survey data

Direct marketing creative

Abbreviations and terms

Abbreviations

#### Appendix - Market

Figure 60: Health club memberships (millions), 2005-15

Figure 61: Total number of (US) health clubs, 2005-15

Figure 62: Exercise location, 2004-16

Figure 63: Type of exercise participated in - Every chance I get, 2004-16

Figure 64: Share who exercise regularly, 2004-16

Figure 65: Percentage of adults aged 18 and over who met the 2008 federal physical activity guidelines for aerobic activity through leisure-time aerobic activity: United States, 1997–2014