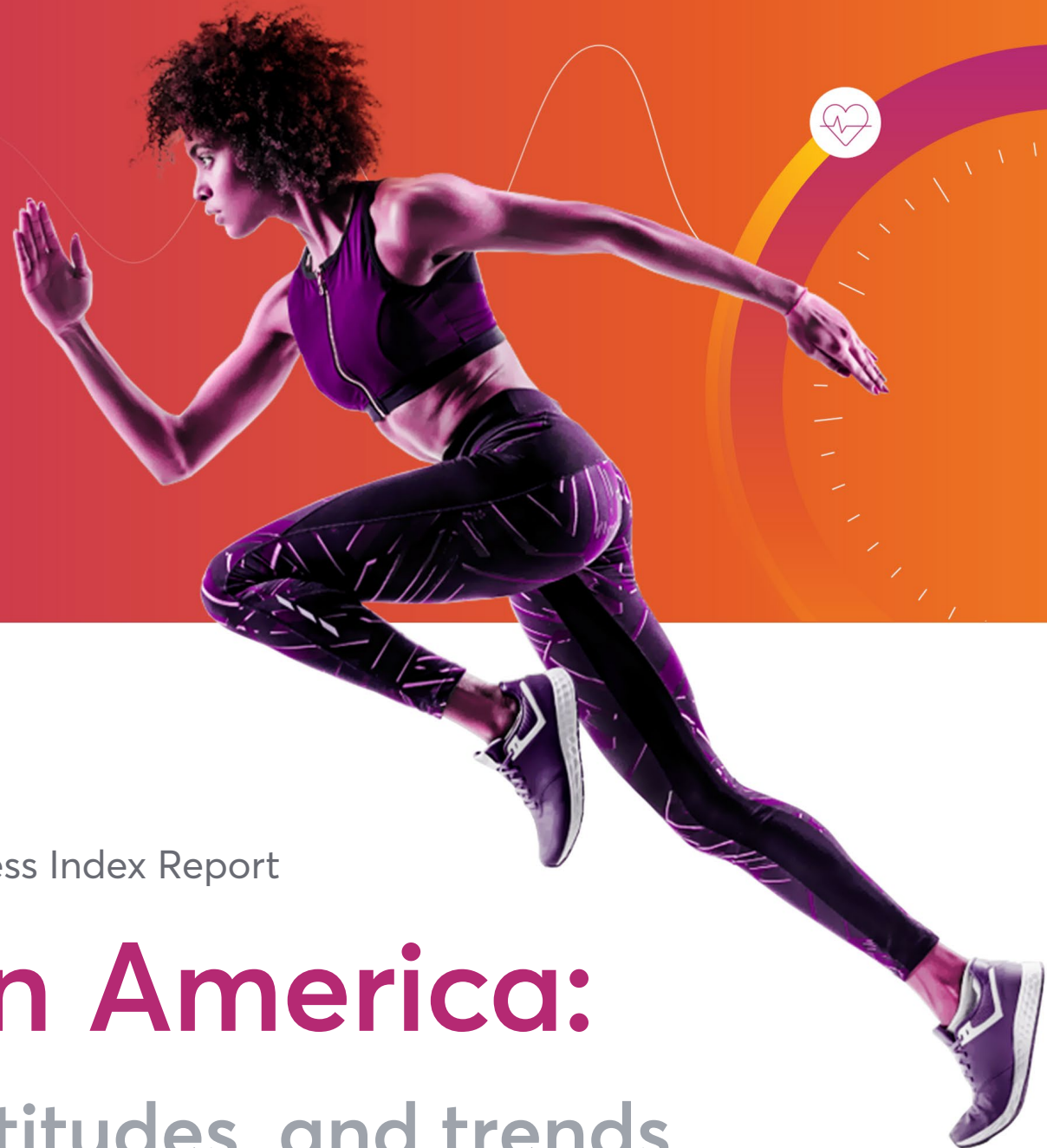




A 2019 MINDBODY Wellness Index Report

Fitness in America:

behaviors, attitudes, and trends



About the MINDBODY Wellness Index

The MINDBODY Wellness Index measures the strength of the wellness marketplace by analyzing business success factors—and consumer behaviors and attitudes—in the fitness, beauty, and integrative health industries.

With more than 67,000* businesses and 58 million* consumers globally, MINDBODY is uniquely positioned to offer insight into the relationship between the two. These reports incorporate data at the Metropolitan Statistical Area (MSA) level from proprietary sources, including a large-scale MINDBODY consumer survey covering the [top 50 MSAs](#) in the US.

Nearly 17,000 individuals participated in a 16-minute online survey between Oct. 26 and Nov. 12, 2018. Survey participants spanned the ages of 18 to 65, with a mean age of 39. The sample was 49% male and 51% female. Seventy participants, or 0.4%, self-identify as an alternate gender. Due to low base size, this data isn't included in gender comparisons.

In addition to the flagship [The MINDBODY Wellness Index: Understanding the State of the Wellness Industry in America](#) report, there are additional reports in the series that offer deep dives into findings in fitness, integrative health, and beauty. Wellness providers can look at these trends to understand clients' needs and better support their goals.

This report focuses on fitness services in America.

*As of September 30, 2018.



Most Americans try to prioritize fitness, but are they exercising enough?

While 28% of Americans place a high value on the importance of exercise, nearly an equal number (25%) say fitness is a low priority in their lives. The majority of Americans fall in the middle—trying to prioritize fitness when they can. The good news is that three quarters of Americans are trying to make fitness a priority. How successful are they?

The US Department of Health and Human Services recommends at least 150 minutes of moderate-intensity physical activity, or 75 minutes of vigorous-intensity, each week¹. In addition, it recommends adults do muscle-strengthening activities on two or more days a week. Over 40% of Americans in all age groups we surveyed (and potentially more, depending on the intensity, type and length of the exercises they are doing) are currently missing this target.

Figure 2.1

Relationship with fitness

Fitness is a priority for me/I almost always prioritize fitness

28%

I try to prioritize fitness when I can

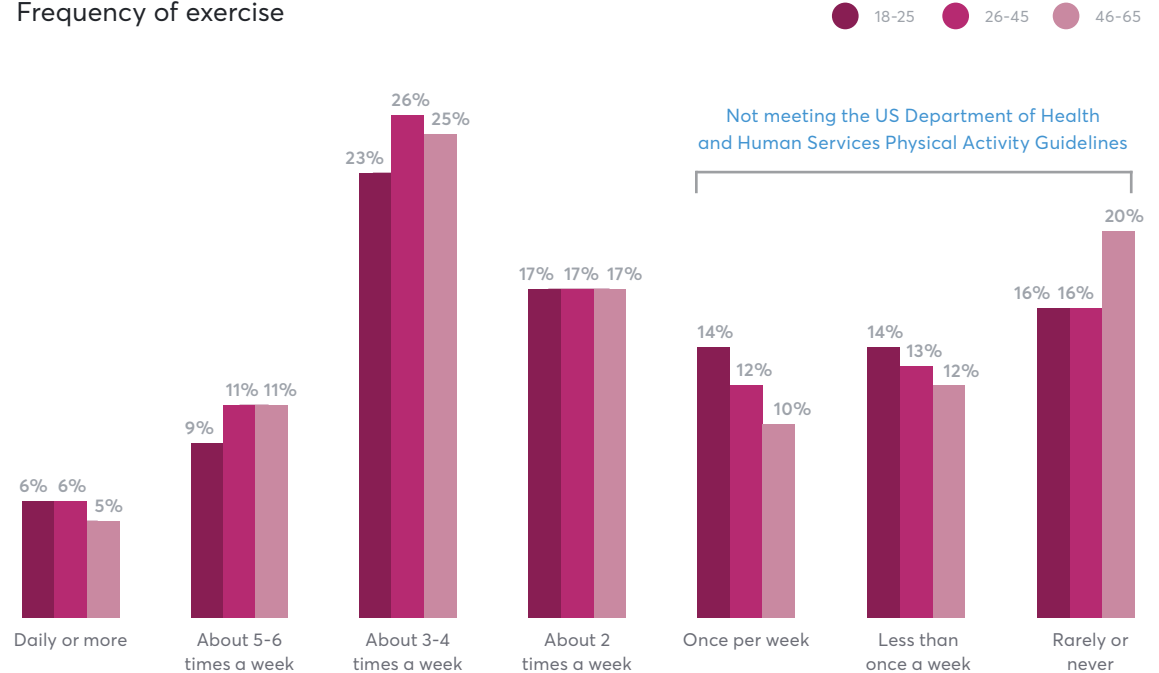
44%

Fitness is a low priority in my life right now

25%

Figure 2.2

Frequency of exercise

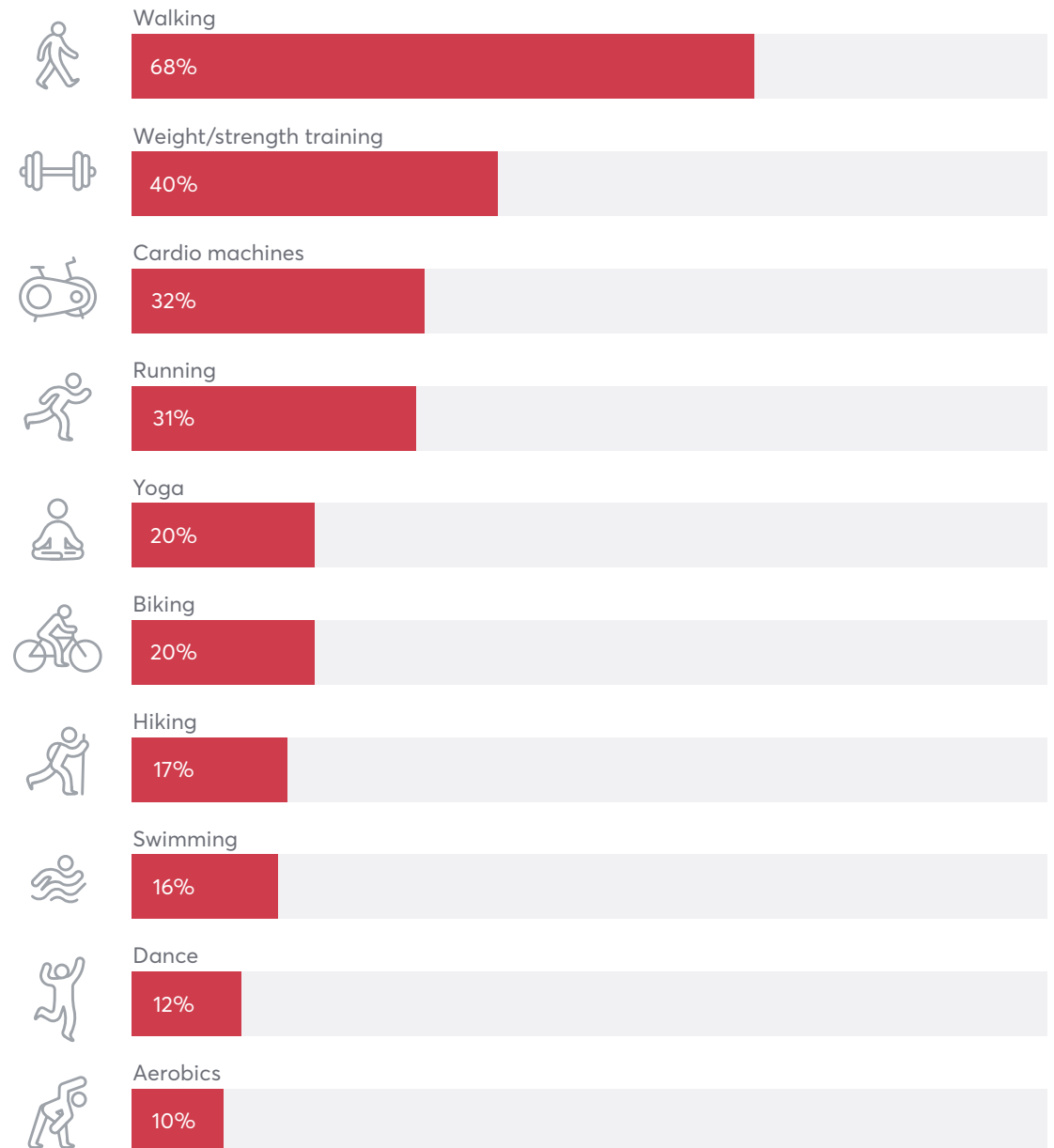


Walking is the most popular form of individual exercise

Americans take part in a variety of exercise forms to support their physical health, but walking topped the list of the most popular activities among all age groups. Overall, 58% of individuals ages 18-25 walk for exercise at least once a week, and this percentage increases among older individuals—65% of 26-45 year-olds walk once a week, as do 77% of 46-65 year-olds.

Figure 2.3

Top 10 individual routine exercises Americans participate in
(Among those who exercise individually at least once a week)



Yoga is the most popular group exercise

Yoga is the top group exercise across all ages, considering both facility-based and outdoor/social group exercises. Group dance classes and weight/strength training are also popular exercises, with similar universal appeal.

Slight variations in preference for group exercise do exist across different age brackets (as you can see on the following pages). Aerobics, for instance, increases in popularity with age, with only 5% of 18-25 year-olds participating in this activity versus 12% of those ages 25-45, and 16% of 46-65 year-olds. In addition, those in the 18-25 and 26-45 age groups ranked the same exercises within their top five, although the order of preference was different. For the most part, though, the type of group activity respondents participated in over the past year are similar by age.

Figure 2.4

Types of routine group exercises Americans participate in
(Among those who exercise in a group at least once a week)

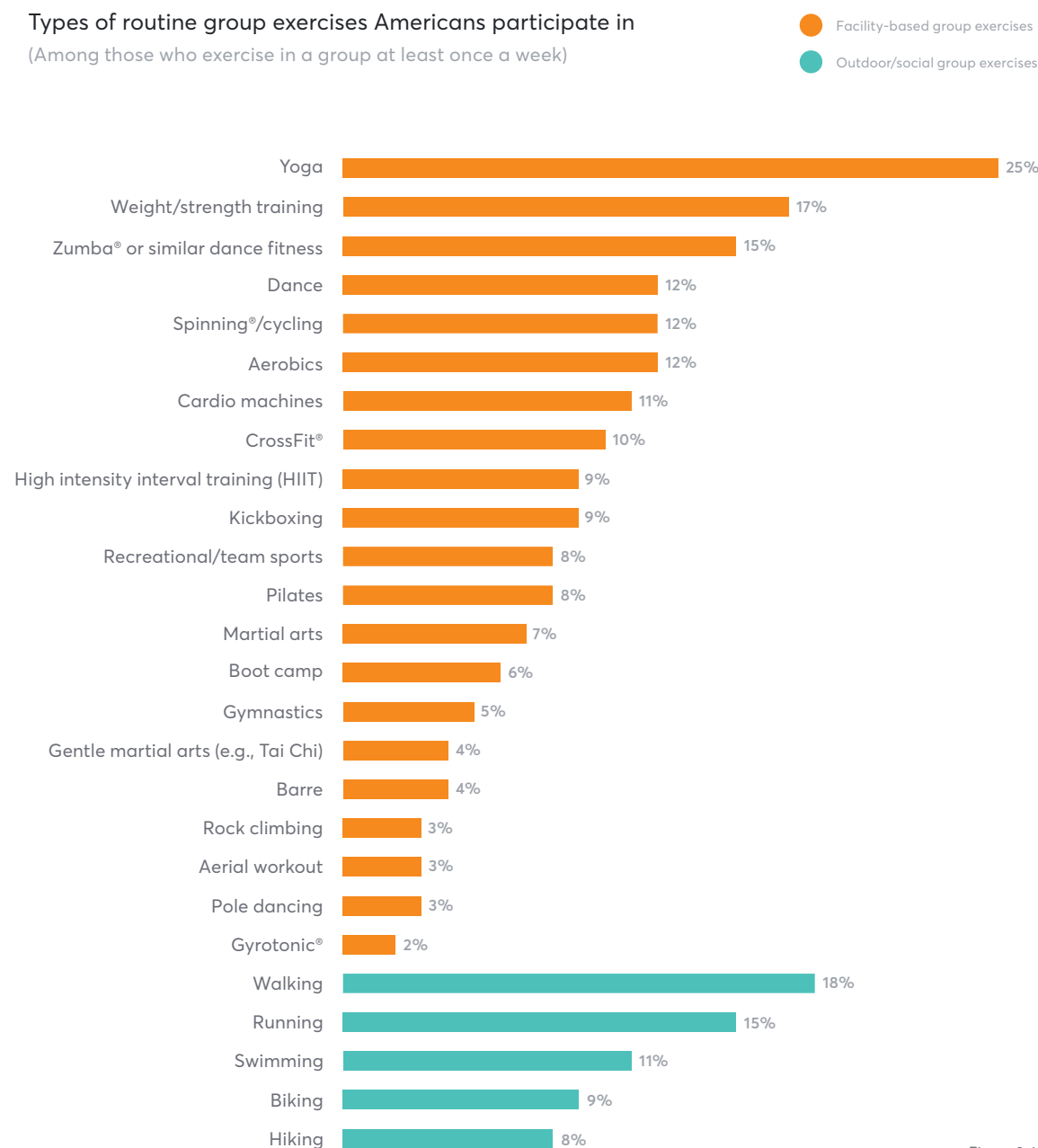


Figure 2.4

Popularity of group exercises by age

Figure 2.5

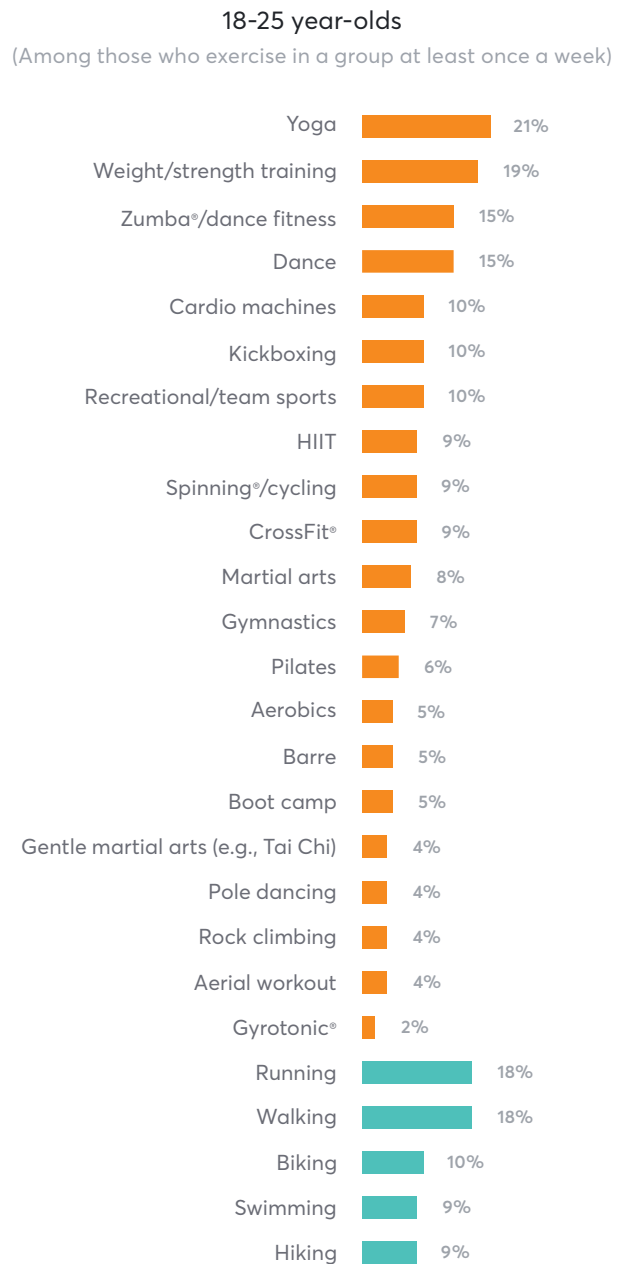
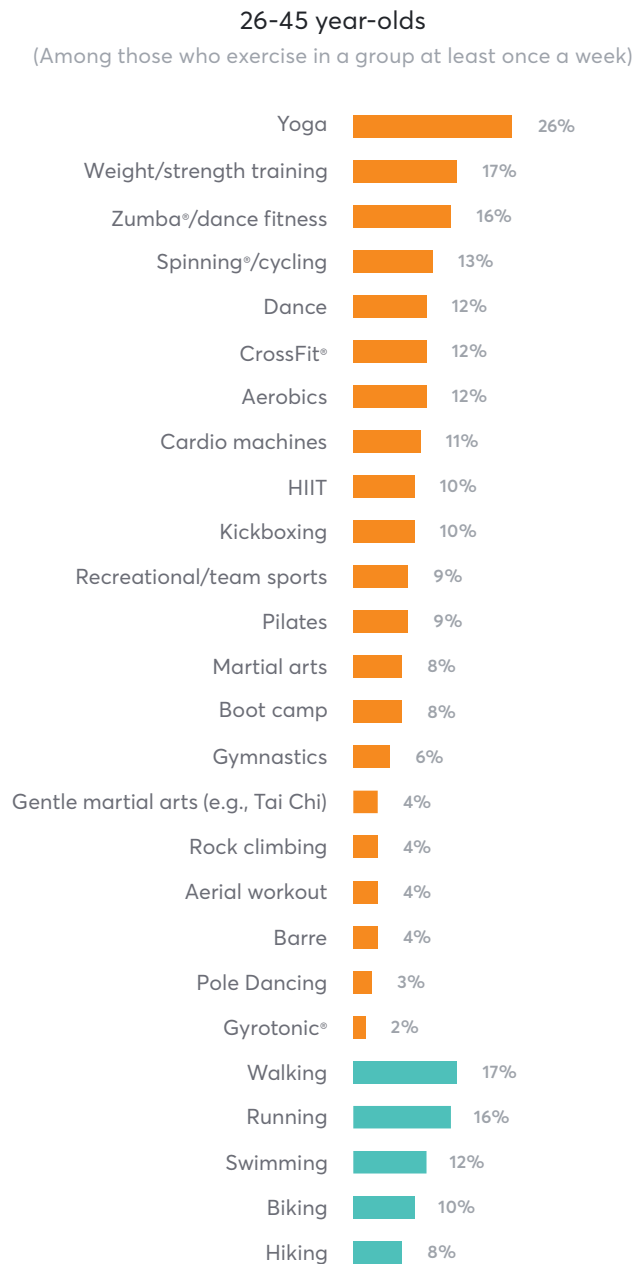
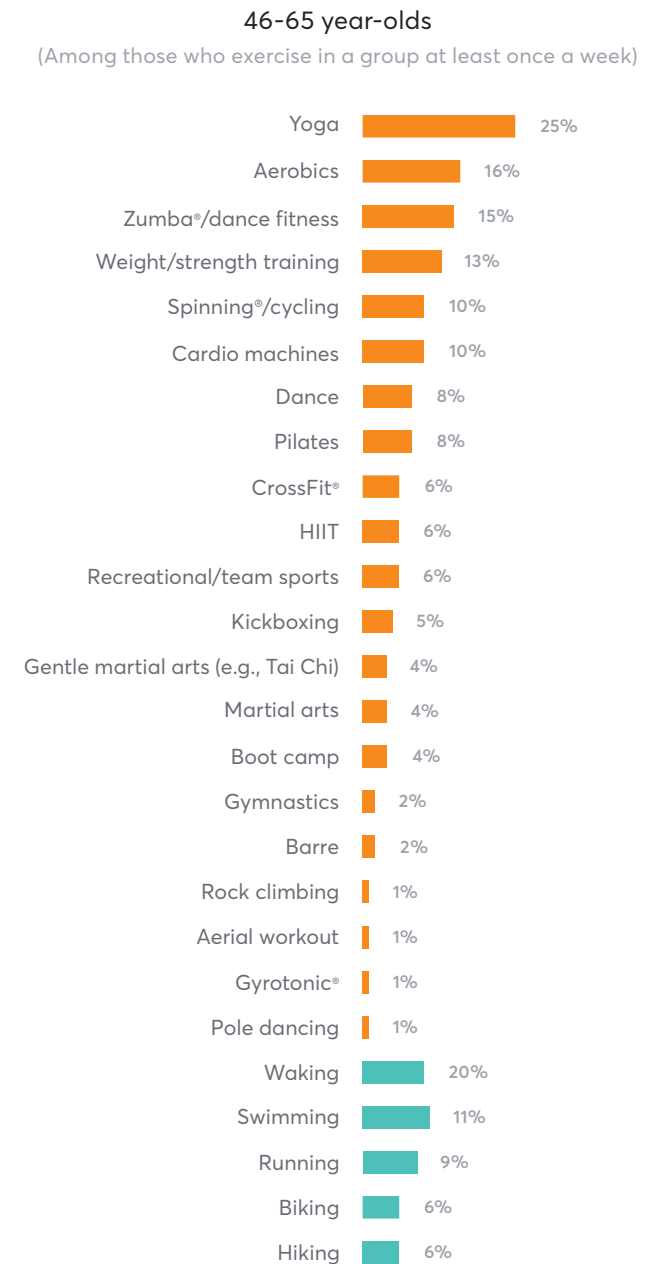


Figure 2.6



● Facility-based group exercises ● Outdoor/social group exercises

Figure 2.7



What are the upcoming trends in fitness? Top exercises people want to try next

When looking at all age groups combined, yoga and swimming top the list as the exercises people are most interested in trying next, as can be seen on the chart on this page. However, the trends vary significantly by age, as is seen on the charts on the following page.

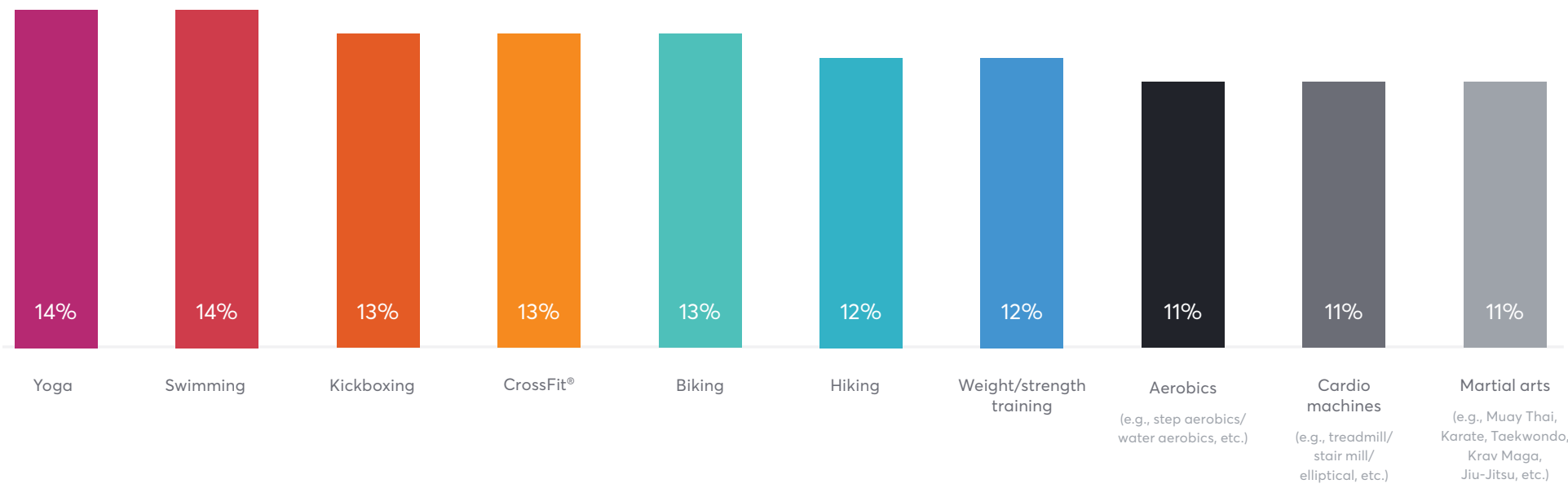
All ages identified swimming within the top three exercises they'd like to try next. Yoga is the number one exercise identified by the older population and is within the top 10 for all age groups.

The younger generation is interested in more vigorous exercise, with kickboxing and CrossFit® coming in the number one and two spots for both the 18-25 and 26-45 year-olds. These two exercises did not even make the top 10 for those in the 46-65 age group. Pole dancing, rock climbing, and gymnastics are especially appealing to 18-25 year-olds, but interest in these activities decreases with age. Although a higher percentage of 46-65 year-olds are opting for aerobics currently, 13% of those ages 18-25 and 11% of 26-45 year-olds want to try it next, suggesting that the appeal is not just limited to older individuals.

Figure 2.8

Upcoming 2019 fitness trends: Top 10 exercises Americans are most interested in trying next

(Among regular exercisers of all ages who are also interested in trying a new exercise)



Top 10 fitness trends by age

Figure 2.9

Top 10 exercises (group and individual)
18-25 year-olds are most interested in trying next

(Among regular exercisers who are interested in trying a new exercise)

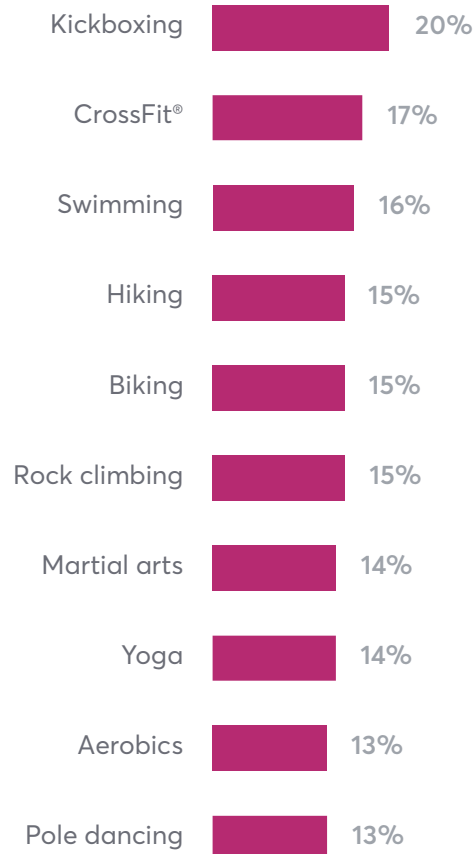


Figure 2.10

Top 10 exercises (group and individual)
26-45 year-olds are most interested in trying next

(Among regular exercisers who are interested in trying a new exercise)

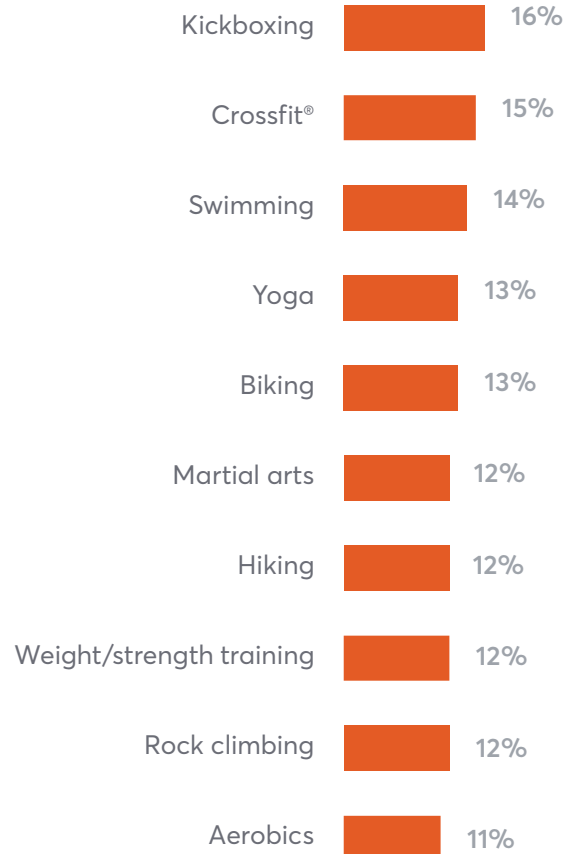
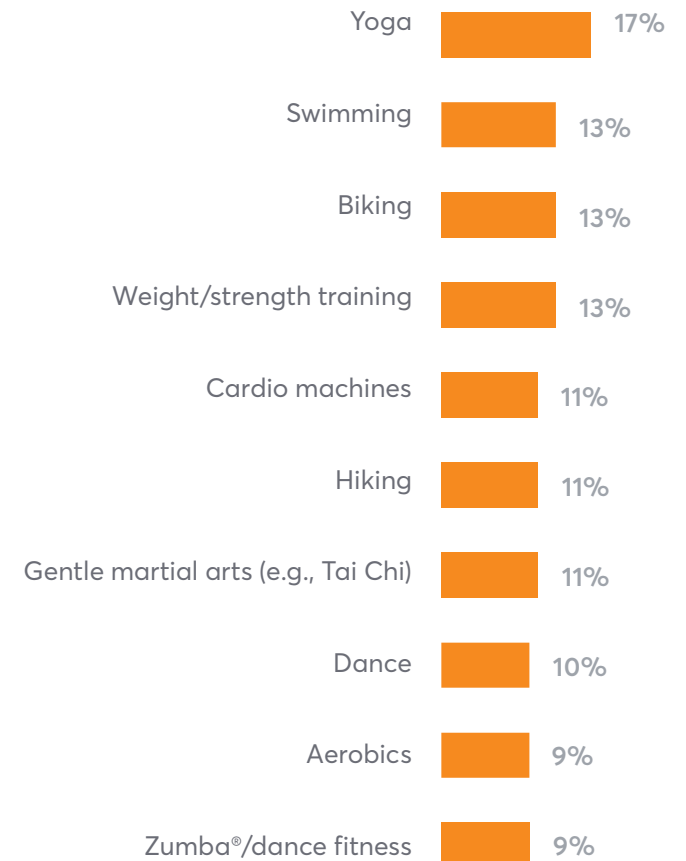


Figure 2.11

Top 10 exercises (group and individual)
46-65 year-olds are most interested in trying next

(Among regular exercisers who are interested in trying a new exercise)



Exploring yoga's universal appeal: What makes it the most popular group exercise in America?

Yoga is the top group exercise across all age groups, with 25% of people currently practicing group yoga at least once a week. At the same time, more 26-45 year-olds (26%), and 46-65 year-olds (25%) do yoga than those ages 18-25 (21%).

Yoga is the leading group and individual exercise that people want to try next—14% of people said they'd be interested in trying a yoga class.

Americans typically spent 1.4 hours doing yoga per week. While it's the most popular group activity, people are also regularly practicing alone. Overall, 20% of people said they practice yoga on their own at least once a week.

Yoga is more than just a chance to improve physical wellness—many yoga studios introduce clients to new ways of approaching and improving holistic health. Looking at the most popular types of workshops hosted at yoga studios, 40% of people noted that they are interested in or have attended meditation workshops, 30% expressed an interest/have attended nutrition workshops, and 28% are interested/have attended breathing workshops.

Figure 2.12

Yoga is the leading exercise



Top 3 events at yoga studios Americans have attended or are interested in attending

Meditation workshops



Nutrition workshops (e.g., healthy foods, proper nutrition, etc.)



Breathing workshops



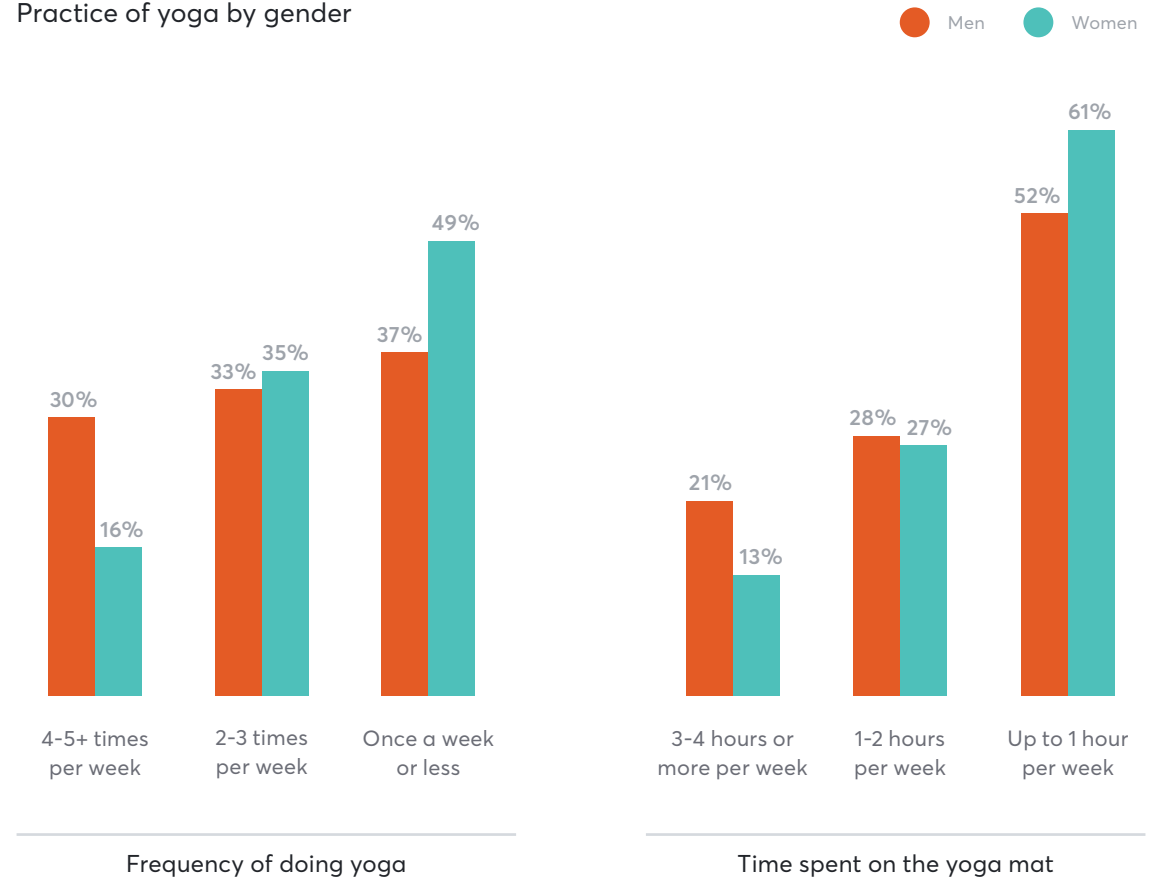
Figure 2.13

Men spend more time on the mat

By gender, 30% of women who participate in weekly group exercise are practicing yoga, compared to 19% of men. 12% of women and 9% of men are interested in trying group yoga. However, men who do practice yoga engage in this activity more often and spend more time on a weekly basis than their female counterparts.

Almost as many women do yoga individually as in a group, 27% versus 30% respectively, compared to 12% and 19% of men, respectively.

Practice of yoga by gender



Top reasons for exercising

While there are some common reasons for exercise among all age groups, there are some differences in motivation. "Losing or gaining weight" and "feeling good" made the top three reasons for all ages, but younger Americans cite "looking better physically" as their top motivation, whereas older Americans say "wanting to live a long and healthy life" is their top reason. In addition, 26-45 year-olds choose "lose or gain weight" as the top reason.

The majority of Americans are slightly/moderately satisfied with their fitness level

All three age groups felt similarly satisfied with their overall fitness level and are relatively consistent in their prioritization, spending, and frequency of exercise.

Figure 2.14

Top reasons for exercising by age

18-25 year-olds

32.5%

I look better physically

29.5%

I can lose or gain weight

29.3%

I want to feel good

26-45 year-olds

30.7%

I can lose or gain weight

30.2%

I want to look better physically

30.1%

I want to feel good

46-65 year-olds

33.9%

I want to live a long and healthy life

31.5%

I can lose or gain weight

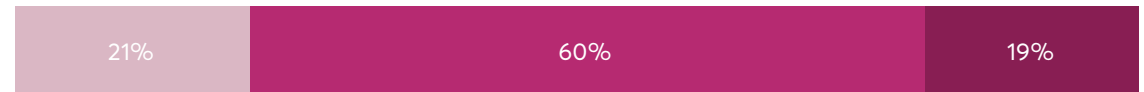
30.3%

I want to feel good

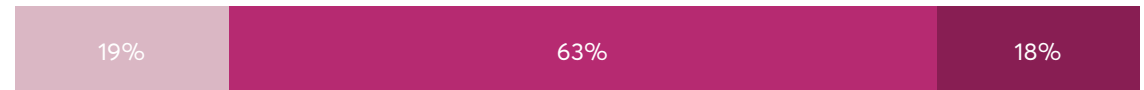
Figure 2.15

Satisfaction with overall fitness level by age

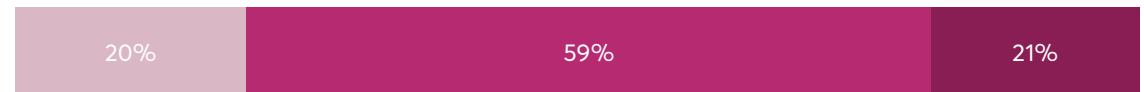
All



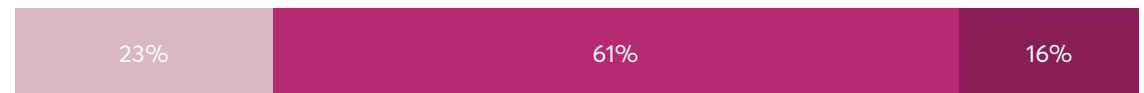
18-25



26-45



46-65



● Not at all satisfied ● Slightly/moderately satisfied ● Very/extremely satisfied

The gender divide in fitness: the differences between men and women

Men have a significantly higher overall satisfaction with their fitness level than women: 25% of men report being extremely or very satisfied with their overall fitness level, whereas only 14% of women say the same.

Men exercise significantly more often than women, with 46% of men exercising three or more times a week compared to only 38% of women. One third of American women reported exercising less than once a week.

Figure 2.16

Satisfaction with overall fitness level by gender

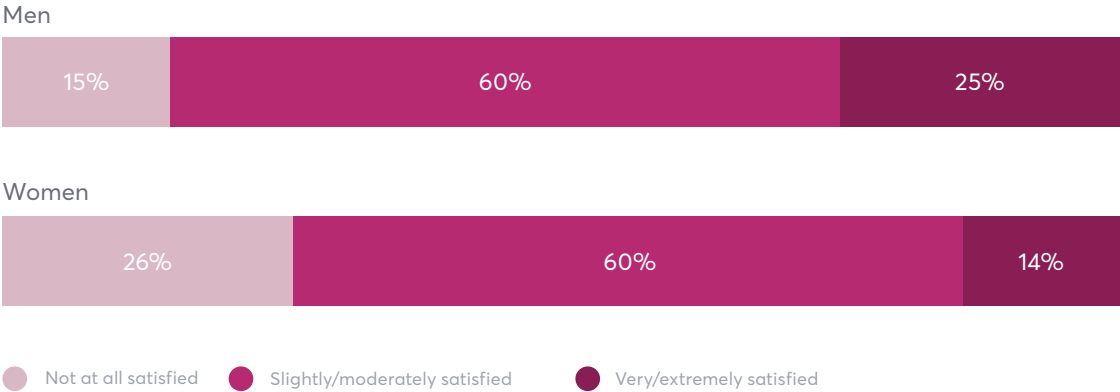
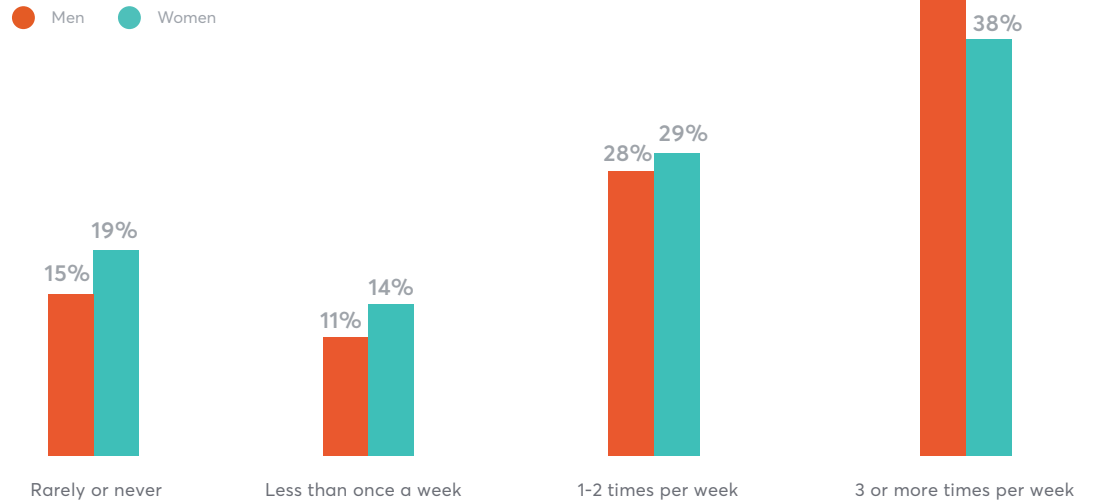


Figure 2.17

Frequency of exercise by gender



The gender divide in fitness: the differences between men and women (cont.)

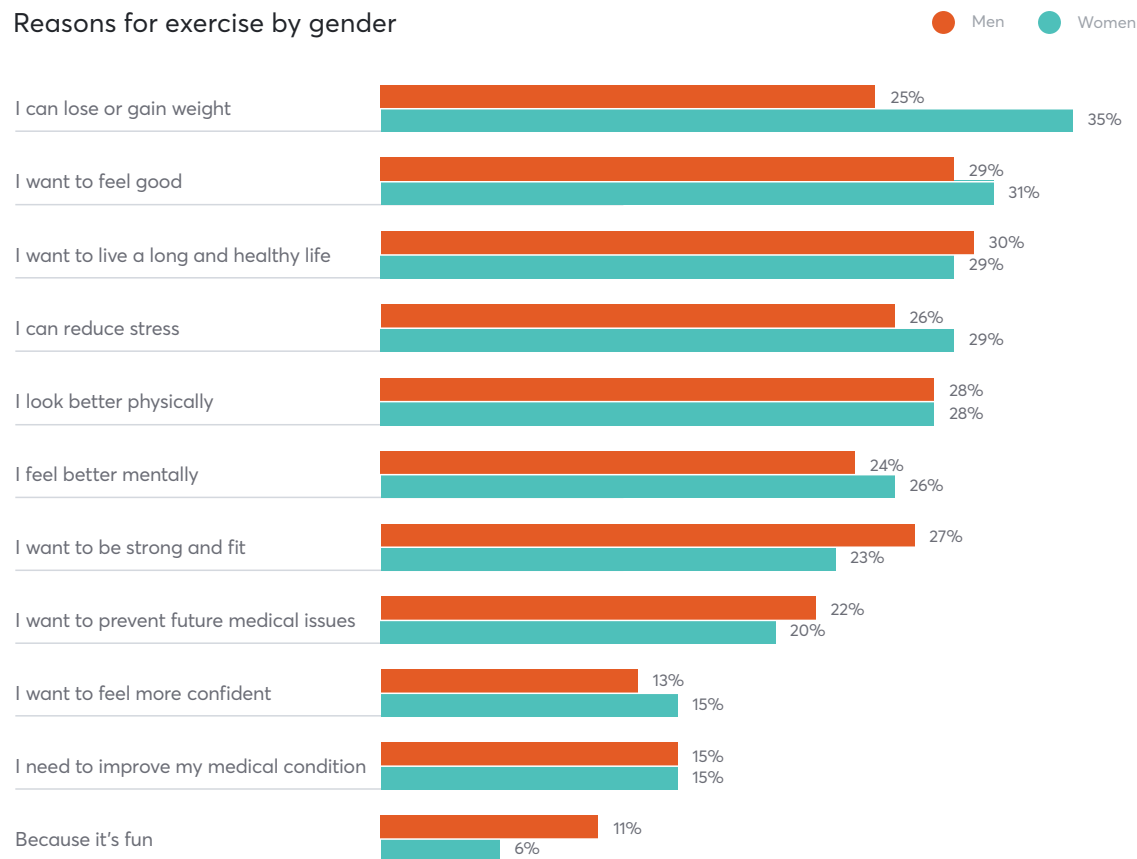
A comparable percentage of both men and women noted that they exercise to live a long and healthy life, at 30% and 29%, respectively. While men place the highest value on this reason (30%), women place more value on losing or gaining weight (35%) and feeling good (31%). In fact, significantly more women than men noted that they exercise for these reasons as well as to reduce stress (29%), feel better mentally (26%), and to feel more confident (15%).

Conversely, a considerably higher percentage of men exercise because they want to be strong and fit (27%), to prevent future medical issues (22%), and/or because it's fun (11%).

Men and women equally note that they exercise to look better physically (28%) and to improve their medical condition (15%). Both men and women noted that they exercise to prevent future medical issues, and to be strong and fit.

Figure 2.18

Reasons for exercise by gender



Money and time are the top obstacles to leading a healthier life

Nearly 50% of Americans identify money constraints as a top obstacle to living a healthier life. Time constraints are a distant second at 37%.

Financial strain is most acute with the younger generations—51% of 18-25 year-olds and 49% of 26-45 year-olds cite money as the most prevalent stumbling block to leading a healthier life, while only 43% of 46-65 year-olds say money is an obstacle. Women also believe money is more of a factor, with 52% identifying money as an obstacle versus 41% of men.

Regardless of age or gender, money is clearly a perceived factor in achieving a healthier life. This raises several interesting questions, like: How do we make fitness activities and achieving a healthier lifestyle more affordable? Wellness service providers can help shift the monetary value placed on health and wellness to make healthier habits more accessible.

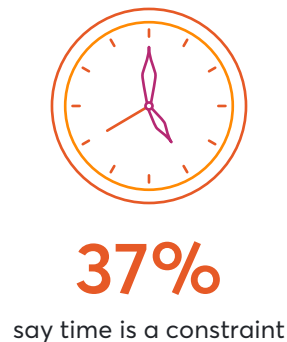
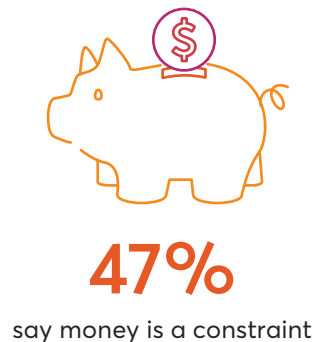
Time constraints are also an issue in leading healthier lives, with 37% of Americans citing this as a key obstacle. Time is cited by both men and women equally, but those in the 18-25 and 26-45 age ranges have more time constraints than 46-65 year-olds.

As time appears to be a common issue, it is worth exploring how healthy habits and investments can be made where most adults spend the majority of their lives—at work. There is opportunity to support healthy lifestyles for employees at their workplace and accommodate time-pressed Americans. Fitness businesses must also keep time constraints in mind when offering classes or services, as this is a hindrance for many.

Consumer time constraints and start-up costs are perhaps two reasons for the emergence of pop-up and express fitness classes.

Figure 2.19

Top two obstacles to a healthier life



The role of age: obstacles to healthy living

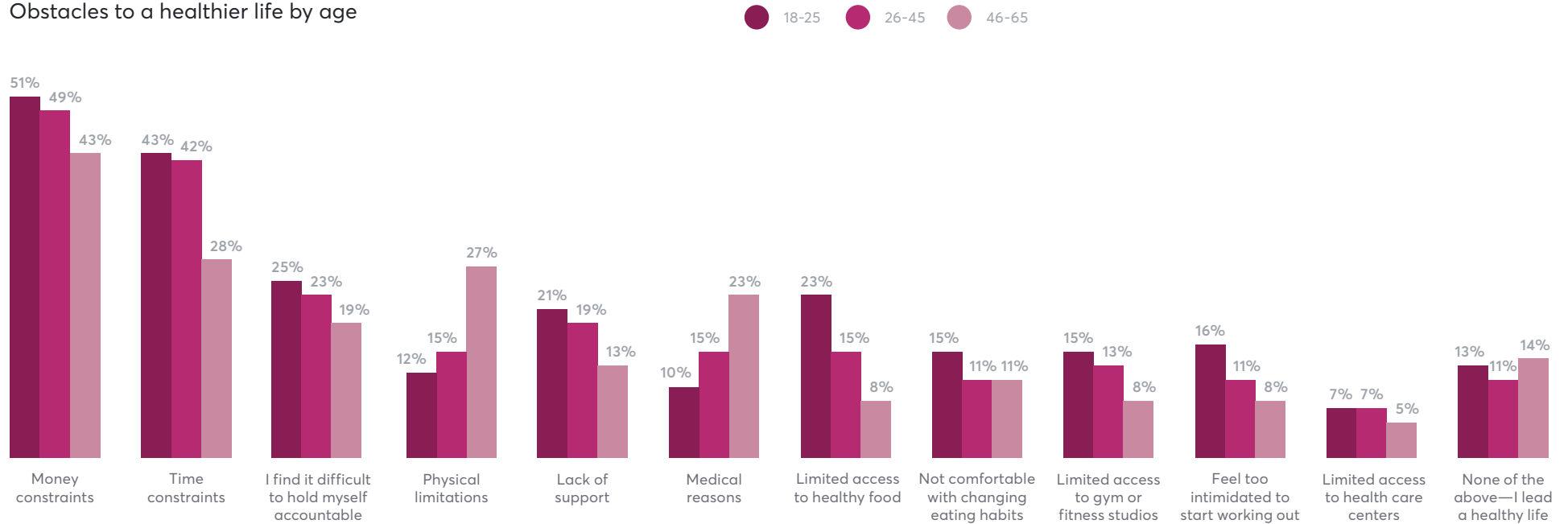
In general, 18-25 year-olds cite an array of issues beyond just time and money that prevent them from leading healthier lives. In addition to financial and free time constraints, this age group also:

- Finds it difficult to hold themselves accountable (25%).
- Lacks support, and often finds themselves surrounded by unmotivated people (21%).
- Has limited access to healthy foods (23%).
- Feels too intimidated to start working out (16%).

The older generation of 46-65 year-olds, on the other hand, lists physical limitations (27%) and medical reasons (23%) as additional top issues.

Figure 2.20

Obstacles to a healthier life by age



The role of gender: obstacles to healthy living

Overall, women feel more limited than men in their journey to lead healthier lives. As mentioned previously, a higher percentage of women cite money as an issue. Women also report being significantly more impacted by issues like:

- Accountability
- Physical limitations
- Lack of support
- Medical reasons
- Limited access to healthy food

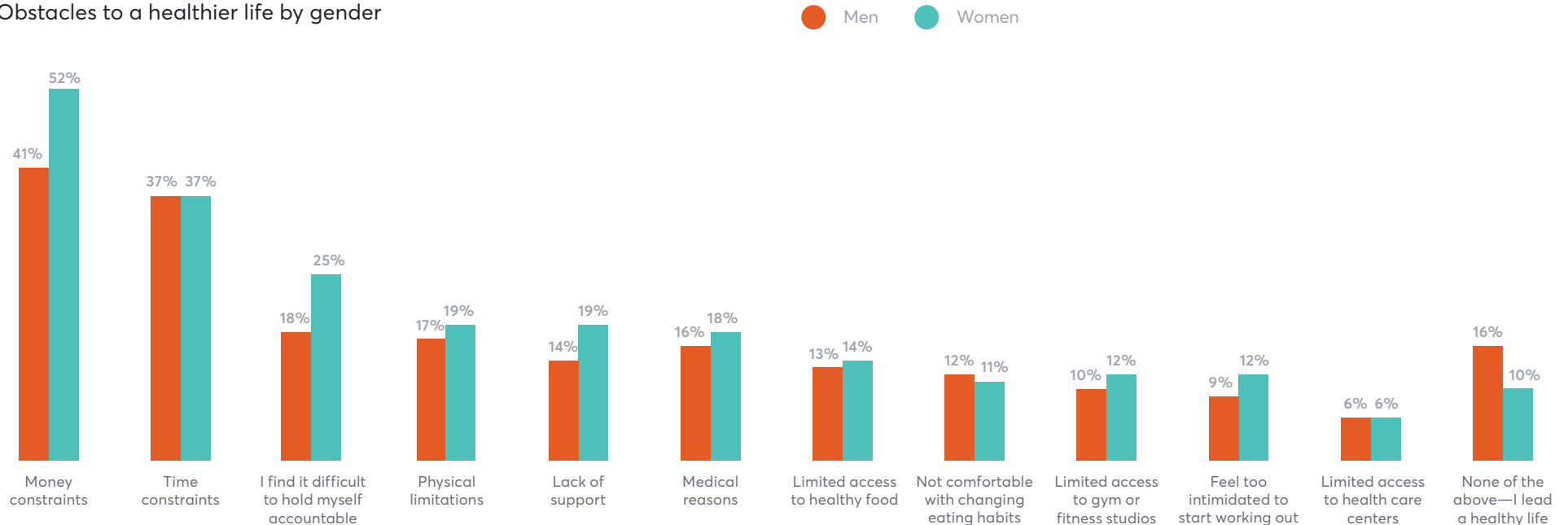
- Not being comfortable with changing their eating habits
- Limited access to gyms or fitness studios
- Feeling too intimidated to start working out

A markedly higher percentage of men (16%) reported they have no obstacles and lead healthy lives, as compared to only 10% of women.

Fitness businesses that have an awareness and understanding of these key obstacles can work to tailor their services to make individuals feel more comfortable and confident about overcoming the issues that stand in the way of healthier living.

Figure 2.21

Obstacles to a healthier life by gender



About MINDBODY

MINDBODY, Inc. is the leading technology platform for the fitness, wellness, and beauty services industries. Local entrepreneurs worldwide use MINDBODY's integrated software and payments platform to build, market, and successfully run their businesses. Consumers also leverage MINDBODY to more easily find and engage with providers in their local communities. MINDBODY is committed to helping people lead healthier, happier lives by connecting the world to fitness, beauty, and wellness.

About the MINDBODY research team

The MINDBODY Research & Insights team is a diverse and experienced group of market and user researchers, with deep expertise in advanced quantitative methods, qualitative, and mixed research methodologies. The team brings together PhDs, MBAs, economists, behavioral and social scientists, and international specialists. With broad skills in both consumer and business research and decades of collective industry experience, the team delivers high-impact research in both domestic and international markets to help position MINDBODY as an industry leader.





For more information on the MINDBODY Wellness Index, or to review other reports in our MINDBODY Wellness Index series, visit business.mindbody.io/education/wellness-index-2019, or email wellnessindex@mindbody.io.

For more educational resources, including webinars, guides, conference presentations, and online courses to help your wellness business, visit business.mindbody.io/education.

To learn first-hand how MINDBODY can position your business for success, schedule a guided tour today at www.mindbodyonline.com/business-software, or give us a call at 877-755-4279.

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1. 2018, Physical Activity Guidelines for Americans, 2nd edition, U.S. Department of Health and Human Services, https://health.gov/paguidelines/second-edition/pdf/Physical_Activity_Guidelines_2nd_edition.pdf