

2023 State of the Wellness Industry



Can you guess the

Healthiest City of 2023?

Nº 1

San Francisco, CA

This Northern California metro jumped up 5 spots from last year and ranks highly across many dimensions of wellness.

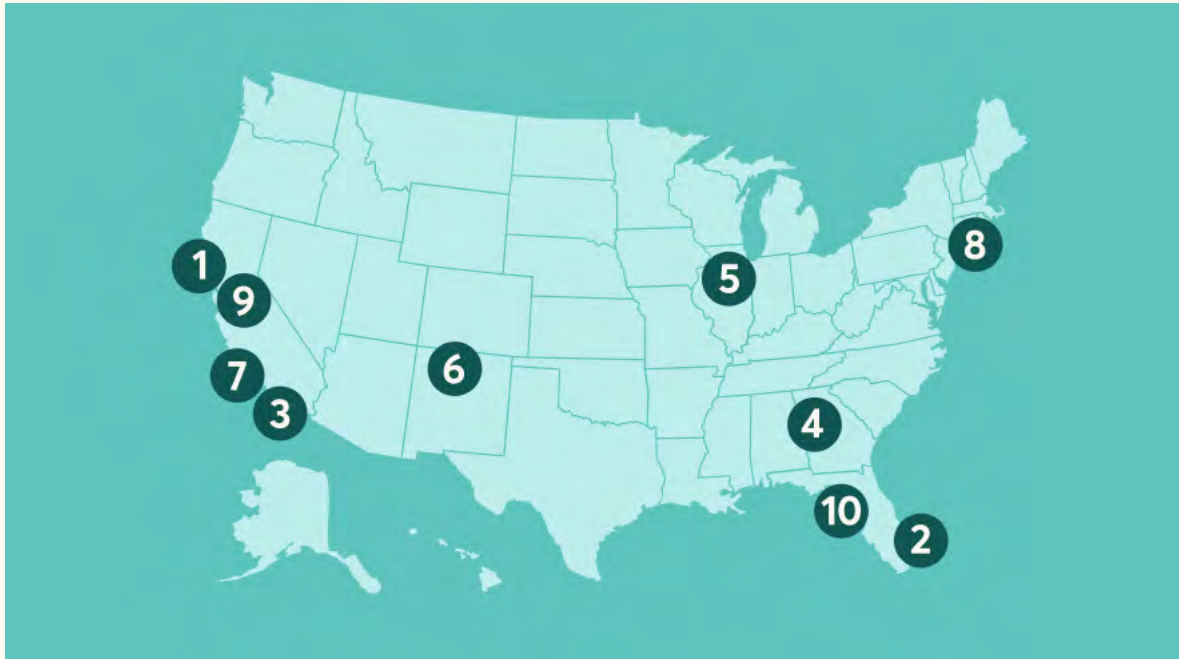
San Franciscans spend the 3rd-highest amount on fitness, beauty, and wellness in the US—on average, \$331 each month.

More than half of residents exercise 90 minutes or more per week, with the most popular workout being yoga.

SF also has a high percentage of residents (55%) who get 7-8 hours of sleep every night and the highest number of non-smokers in the US.



Top 10 Healthiest Cities in America



- | | |
|----------------------|--------------------|
| 1. San Francisco, CA | 6. Albuquerque, NM |
| 2. Miami, FL | 7. Los Angeles, CA |
| 3. San Diego, CA | 8. New York, NY |
| 4. Atlanta, GA | 9. Oakland, CA |
| 5. Chicago, IL | 10. Tampa, FL |

**All data is out of the 50 most populous cities in the US.*

The 2023 Wellness Index

Exclusive Mindbody and ClassPass
data gathered to help you thrive

Research you can't get anywhere else

We keep you up-to-date on what's happening in the world of wellness by conducting one of the industry's most comprehensive research studies: our annual Wellness Index.

This year, we surveyed **17,475 US adults** to find out how their relationship with wellness continues to evolve—and what that means for the year ahead.



High-level data you should know

Consumers are engaging with fitness and wellness in a range of ways

A renewed focus on wellness

78% of consumers say wellness is more important than ever

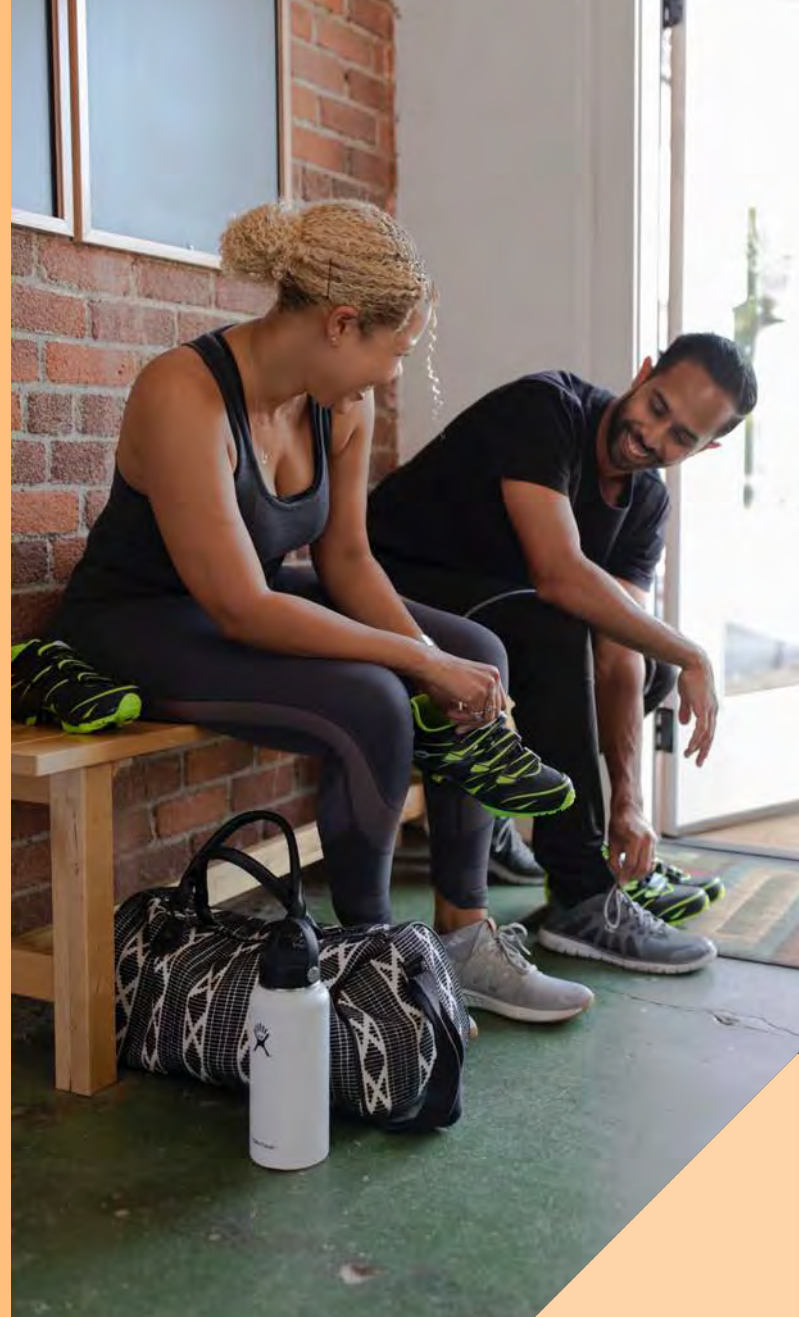
64% say wellness is more important than other leisure expenses

40% say they use physical activity to help support their mental well-being



The definition of wellness is evolving

Wellness now encompasses more than just being in shape. It spans mental, physical, and spiritual dimensions—**and consumers are prioritizing mental wellness above them all.**



Why people are more focused on health & wellness

#1

I want to improve my health

#2

I want to live a long and healthy life

#3

I want to be healthy so I can focus on other things

(e.g., family, hobbies, etc.)



The motivation for fitness has also changed

2021

I want
to control
my weight

2022

I want
to reduce
stress

2023

I want to
live a long &
healthy life



Increased fitness/wellness bookings

Fitness reservations increased **95%** from 2021 and wellness reservations increased by **62%**

For the first time since 2019, usage spiked from December to January (50%), showing a **resurgence of in-person wellness**



Why people are again focusing on in-person fitness

Motivation:

81% of people say they push themselves harder in class than they do on their own

Instructors:

74% prefer to have an instructor's direction when working out

Accountability:

67% say in-studio classes make it easier to work out regularly and keep up a routine

Equipment:

67% cite access to equipment as one of the main reasons they're heading back to class



What's next?

And how can fitness businesses take advantage of consumer trends?

TREND #1

Strength in numbers

The rise of the
wellness collective

43% of consumers say
community is a very important
part of wellness experiences



TREND #1

Strength in numbers

Wellness businesses have become the quintessential "third place"

More than 1/3 of consumers are likely to choose wellness businesses well known for their community-building

Nearly a quarter say they're more focused on their health & wellness to feel connected to others

Key business takeaways:

- Community is more important than ever.
- Facilitate connection with spaces for members to gather in your facility, social events, and partner-based challenges.

TREND #2

Big female energy

Men work out more, but
it's the year of the woman

Men are more satisfied with their
level of fitness than women

39% of women say they prefer
women-only gyms or fitness studios



TREND #2

Big female energy

35% of women 18-50 structure their workouts based on their menstrual cycle

The number of women who say they're too intimidated to work out at a gym/studio has decreased since last year

Key business takeaways:

- Add female-centric workshops (like how to cycle sync your workouts).
- Offer pre & postnatal classes.
- Add more female instructors to your schedule.
- Provide women-only classes.

TREND #3

Longevity wins

Choosing wellness practices
for a longer life

29% of consumers say they
exercise to live a long and healthy life



TREND #3

Longevity wins

51% of consumers engage in movement that prepares the body for daily living

Workout recovery is a priority—47% of Americans say practices like stretching and restorative yoga are very important

26% practice biohacking for peak physical and mental performance

Key business takeaways:

- Reinforce the connection between movement and long-term health in your marketing and education.
- Prioritize recovery services and/or partner with businesses that offer cryotherapy, ice plunges, etc.

TREND #4

Introducing "Gen W"

The wellness generation

Gen Z and millennials spend more
on wellness than other generations



TREND #4

Introducing "Gen W"

In almost every way, Gen Z and millennials engage with wellness most

More than a quarter say they're focused on wellness to feel connected to other people

Gen Z consumers are most likely to say wellness benefits or perks are important when choosing an employer

Key business takeaways:

- Younger generations see wellness as less of a "nice-to-have" and more as an essential part of daily life.
- Capitalize on these audiences with social media marketing and a strong referral program.

TREND #5

The lowdown on low-impact

Strength training is still #1, but these
low-impact workouts are on the rise

33% of consumers prefer low
intensity/impact training



TREND #5

The lowdown on low-impact

For the first time ever, stretching entered the top 10 and sculpt was the fastest-growing workout of 2022

The average American fitness routine:

- 40% low-intensity training
- 25% moderate-intensity training
- 17% high-intensity training
- 19% recovery

Key business takeaways:

- Add low-impact offerings and ways to promote recovery.
- This could include mobility and stretching classes, on-demand recovery workouts, or local partnerships.

The big picture

- 78% of consumers say wellness is more important than ever
- Longer and healthier life is the key reason for fitness
- Consumers engage with in-person fitness for:
 - *Motivation, Accountability, Instructors, Equipment*
- Trends to leverage in your business:
 - *Community, Female-focused modalities, Longevity, Younger generations, Low-impact*



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