



GEN Z FITNESS REVOLUTION

How Gyms Can Inspire a New Generation

Inspiring the world to work out

HOUSEKEEPING

The Details

SUBGROUP DEFINITIONS

GENERATIONS

- Gen Z: 1997 – 2009
- Millennials: 1981 – 1996
- Gen X: 1965 – 1980
- Boomers: 1946 – 1964

FITNESS ENGAGED

- Exercise/engage in physical activity, wear a fitness tracker, or use a smartphone app to track physical activity

NUTRITION ENGAGED

- Keep a log of food intake, take vitamins/minerals/supplements, use a smartphone app to track diet, talk to friends/doctors about diet, follow a specific diet, or read health food/healthy lifestyle content

MINDFULNESS ENGAGED

- Meditate, use a smartphone app to track mindfulness, practice yoga to increase mindrulness/gratitude, set aside time for a gratitude ritual or jounaling/lists for mindfulness or gratitude



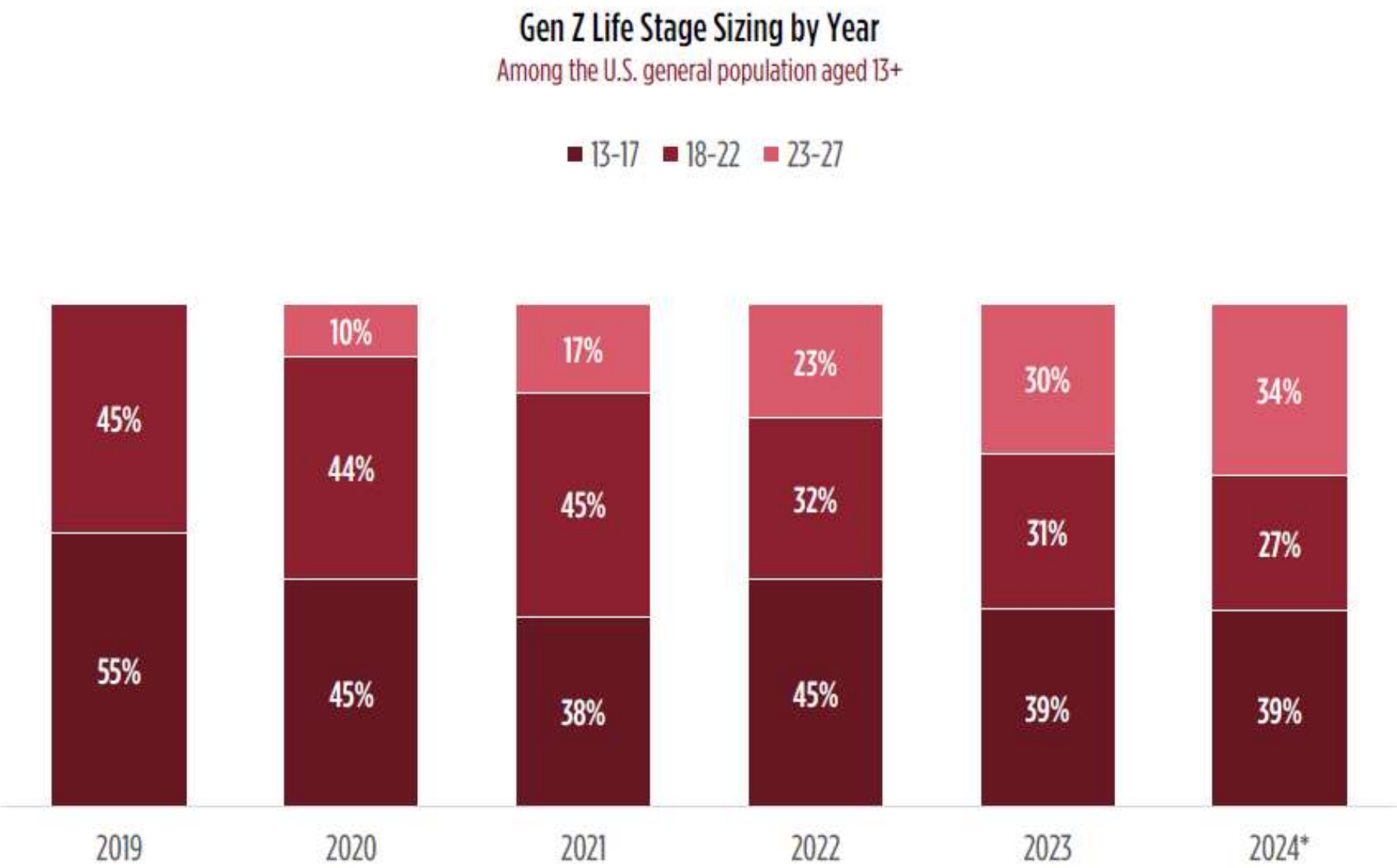
QUANTITATIVE

- Online survey with continuous data collection of 1,000 U.S. respondents per month, starting in July 2018
- Survey Length: 25 minutes
- U.S. teens and adults, age 13 and older
- Nationally representative sample, balanced to U.S. Census targets on age, gender, income, region, and race/ethnicity
- Questionnaire flow:
 - General Health and Wellness
 - Fitness Deep Dive
 - Nutrition and Diet Deep Dive

LIFESTAGE

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Year over year a greater proportion of Gen Z are aging into adulthood. In 2024, the majority of Gen Z are now adult consumers.



As a generation, Gen Z are in rapid transition between life stages. Compared to Millennials at the same life stage, older Gen Z is much less likely to have children or to live with a partner.

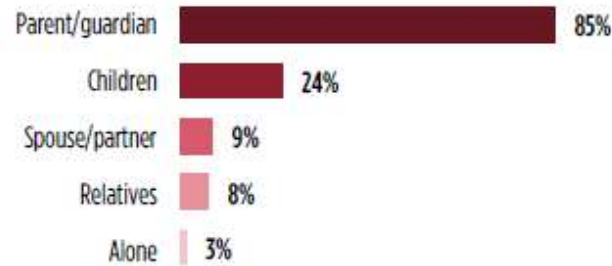
Life Stage Demographics

Among Gen Z

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)

Teens (13-17)

Living Situation



Employment Status

Among Health Engaged



Average Household Income

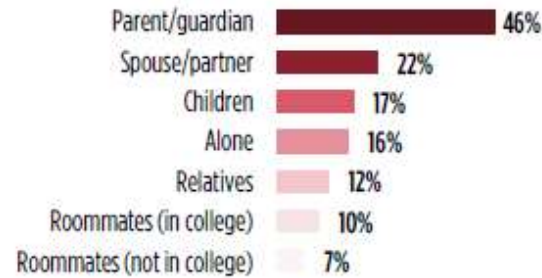
\$90k

Parental Status

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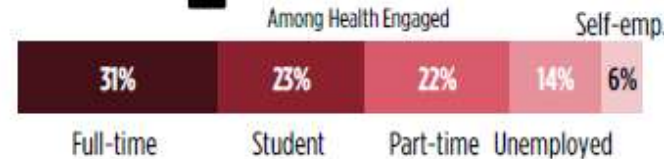
Young Adults (18-22)

Living Situation



Employment Status

Among Health Engaged



Average Household Income

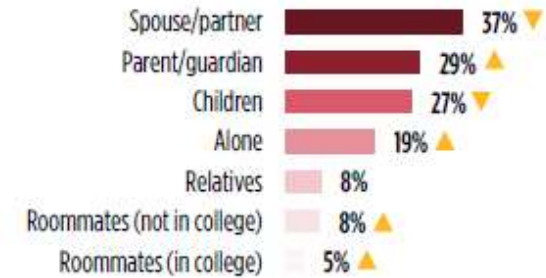
\$56k

Parental Status

20%

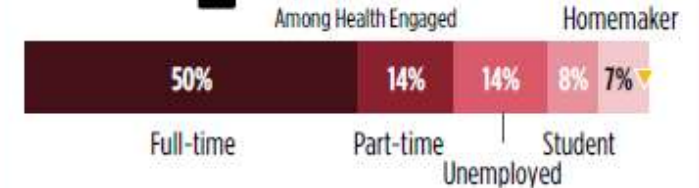
Adults (23-27)

Living Situation



Employment Status

Among Health Engaged



Average Household Income

\$56k

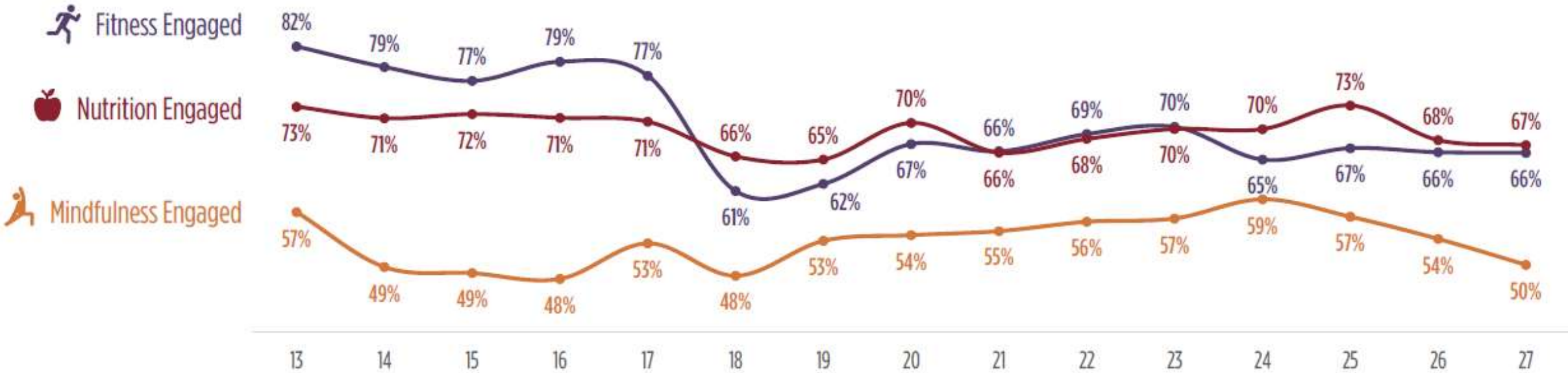
Parental Status

33% ▼

At 18 health engagement drops dramatically as most young adults become more responsible for their own routines and diets. Throughout their 20s, Gen Z gradually rebuilds their health habits.

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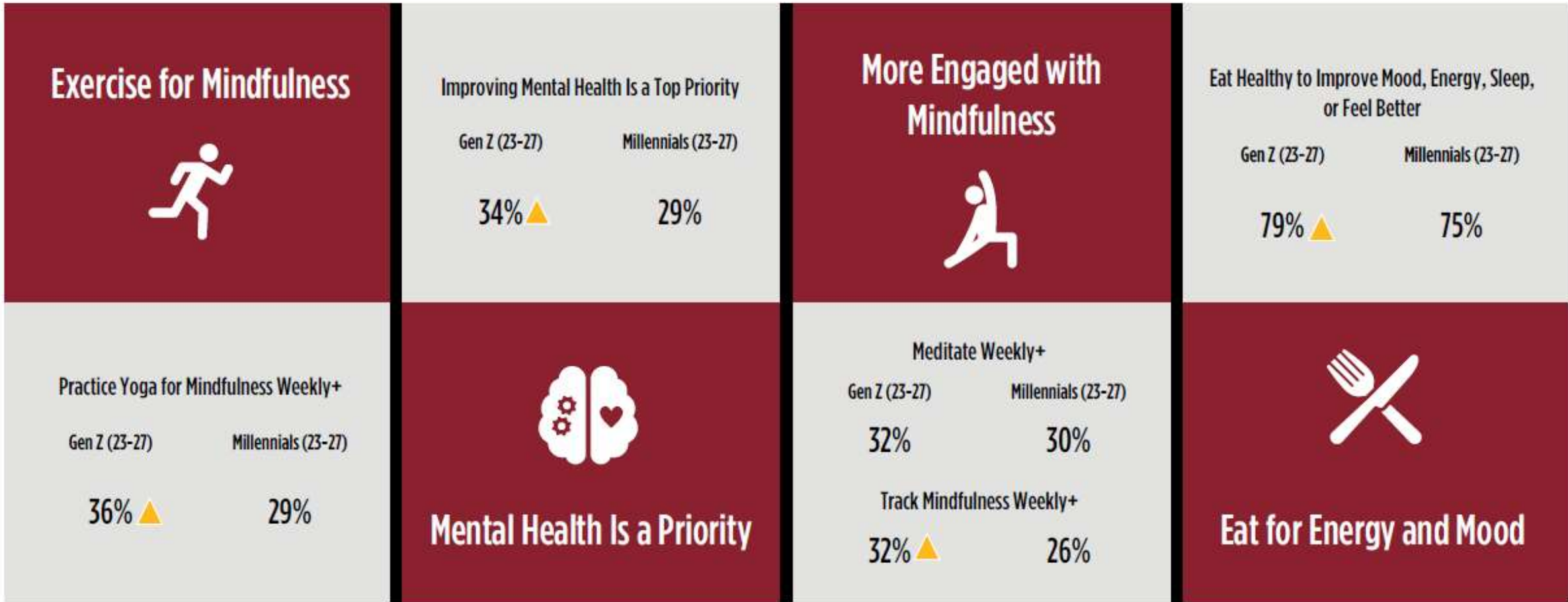
Gen Z Health Engagement by Age
Among the U.S. general population aged 13+



While adults Gen Z's health habits are overall similar to Millennials at the same life stage, a key difference is that mental health plays a greater role for Gen Z and permeates their other health habits.

Early Adult Gen Z Compared to Millennials at the Same Life Stage

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)



KEY TAKEAWAYS

Gen Z are mostly adults now and in charge of their own habits and spending.

Gen Z are more engaged with health overall than millennials were at the same age.

FITNESS

For fitness, Gen Z is also focused on how they want to feel. They enjoy exercise and are willing to spend money on it, perhaps driving greater utilization of gyms compared to Millennials at their same age.

Gen Z Fitness Summary

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)



They are much more likely to use
gyms than Millennials were

Have a Gym Membership

18-22	23-27
47%	48%▲



Gen Z spends more on fitness
apparel

Avg. Annual Spend on Fitness Apparel
(Self-Reported)

18-22	23-27
\$97	\$115▲

From fitness, Gen Z is looking to
have fun and feel good

Primary Goal of Exercise is Having Fun*

18-22	23-27
54%	53%



Money is much less of a barrier
for fitness than it is for nutrition

Will Spend More for Enjoyable Workout
Environment

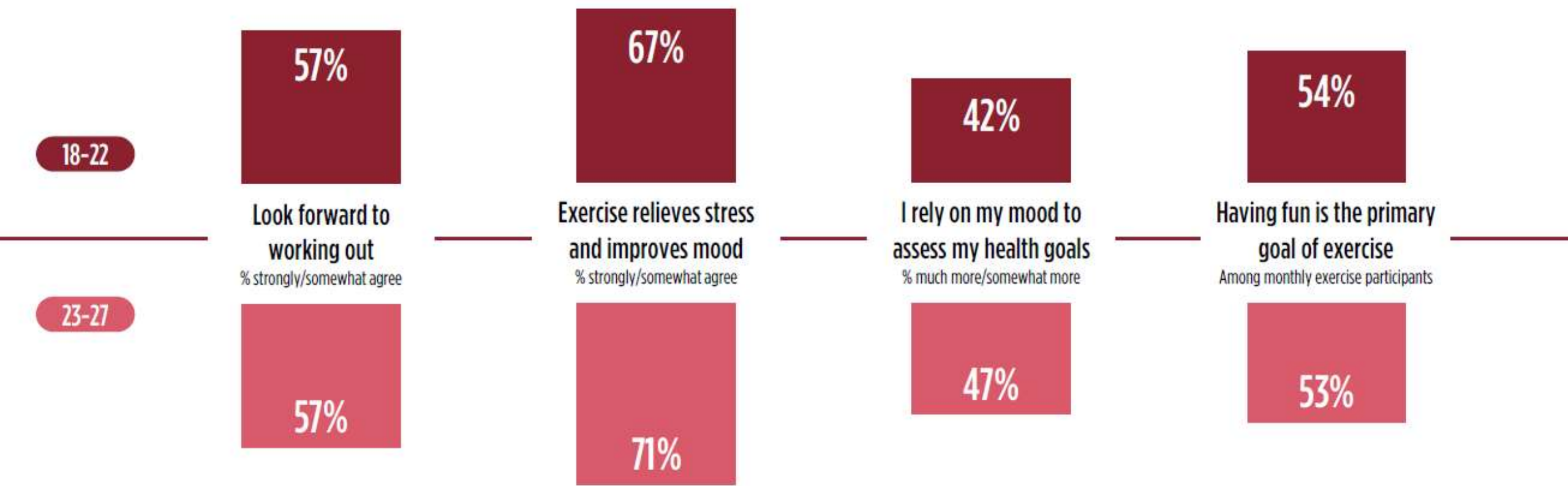
18-22	23-27
50%	51%



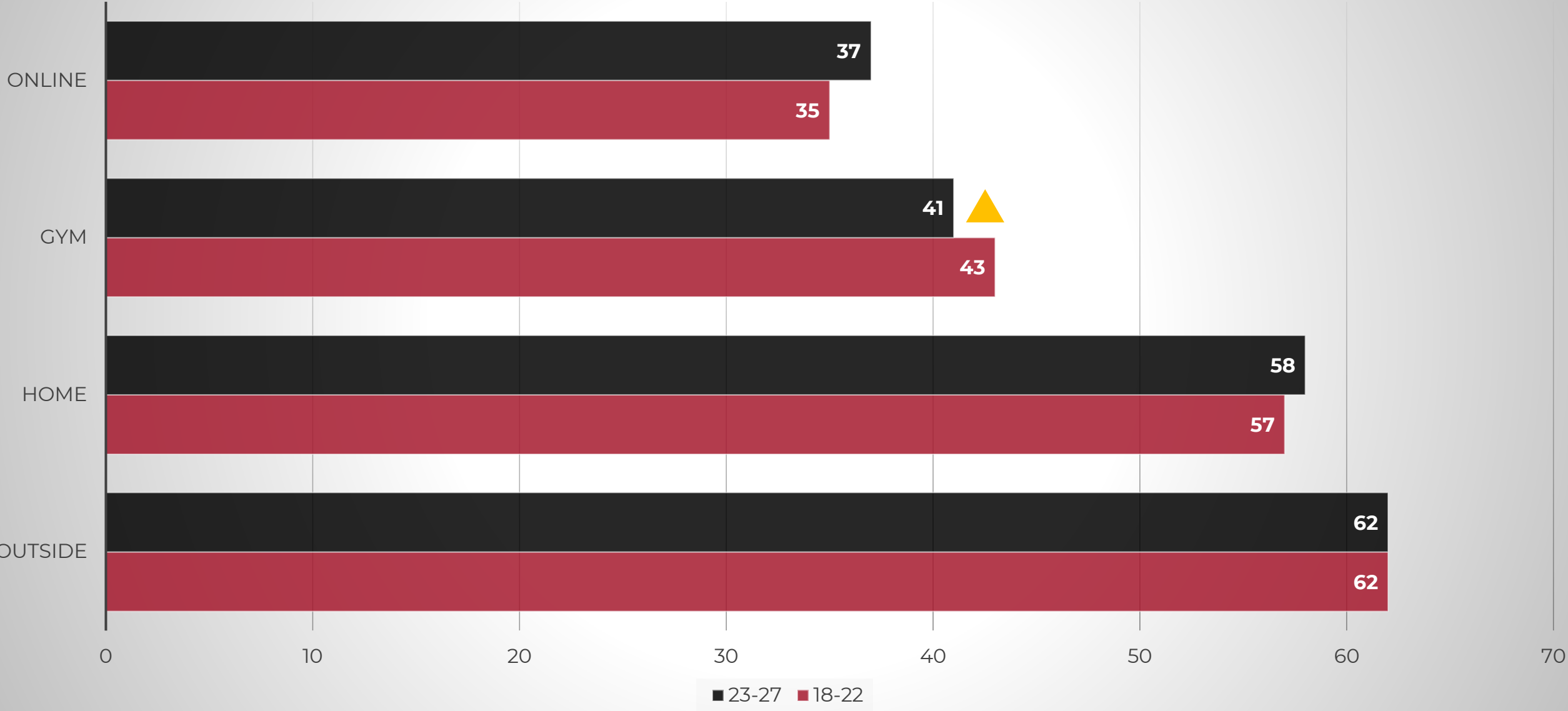
Gen Z genuinely enjoys exercise and values the emotional health benefits. Similar to nutrition, their fitness style often centers on mental health and mood-focused elements.

Adult Gen Z Fitness Stats
Among Fitness Engaged

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)



Gen Z Exercise Locations – Weekly+



Gen Z is willing to spend on fitness. Combined with the popularity of sneakers, this willingness translates into higher numbers of gym memberships and more frequent footwear purchasing compared to Millennials at the same life stage.

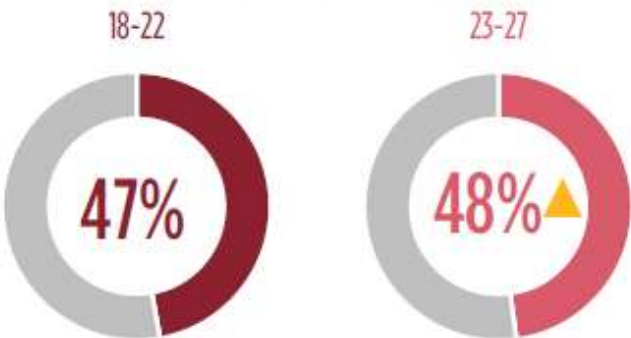
Gen Z Fitness Spending
Among Fitness Engaged

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)

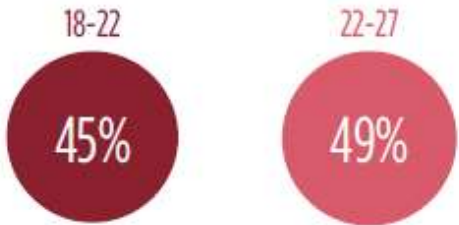
I Will Spend More to Workout in an Environment I Enjoy
% strongly/somewhat agree



Has Gym Membership



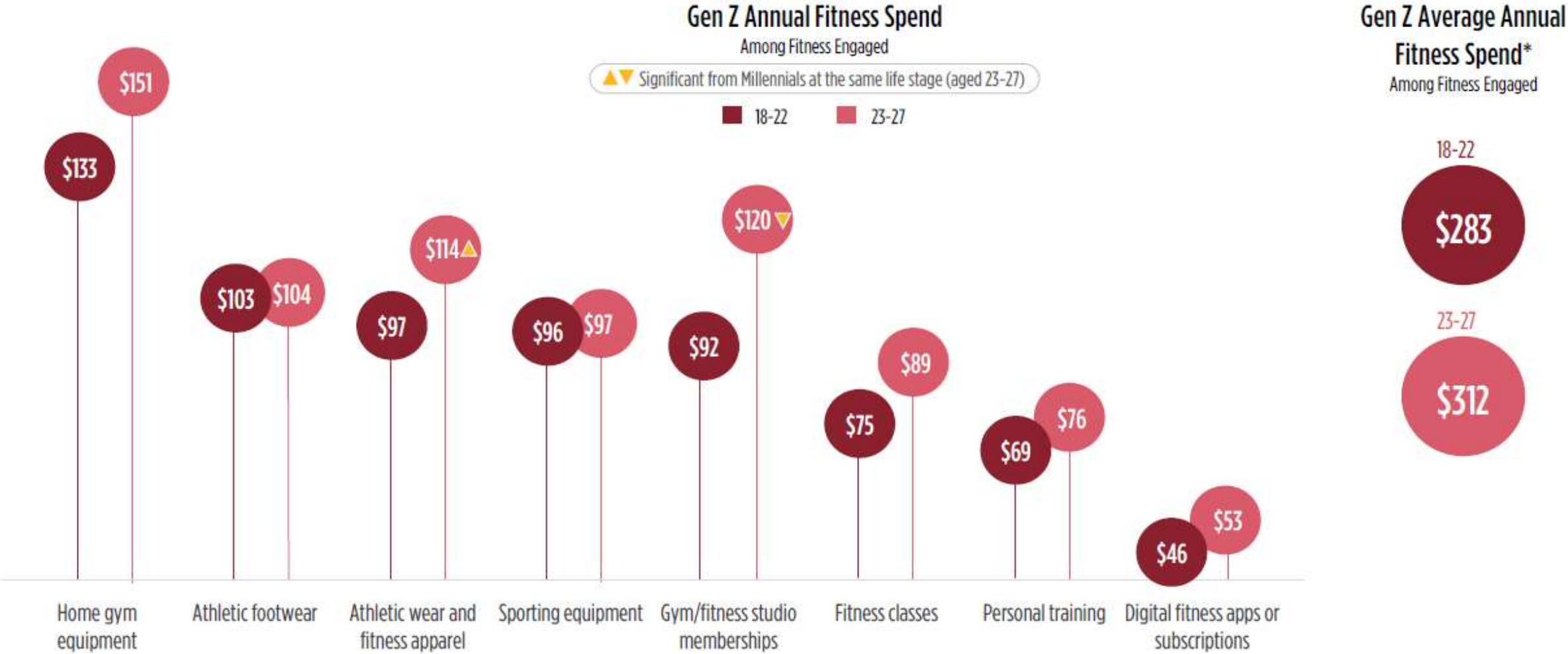
I Always Look for the Highest Quality Athletic Clothing & Gear
% strongly/somewhat agree



Purchase Monthly or More

	18-22	23-27
Athletic Clothing	36%	34%
Footwear	31%	27% ▲
Equipment	26%	27%

Gen Z spends a lot on their fitness, most notably on athletic wear, which they spend more on than Millennials did at the same age. Fashion trends likely contribute to this difference.



Motivation and time are the biggest barriers for Gen Z, and younger Gen Z is more effected by experience-related barriers. Older Gen Z feel external demands more greatly.

Gen Z Fitness Barriers

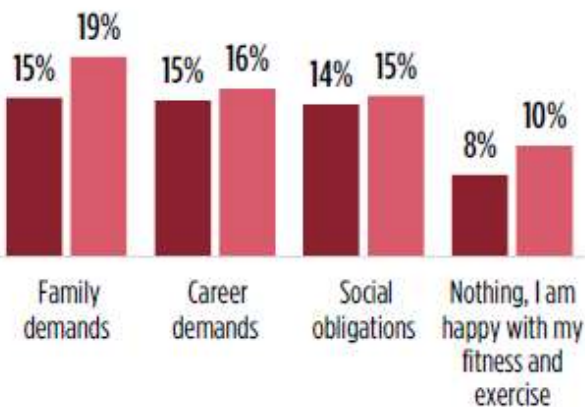
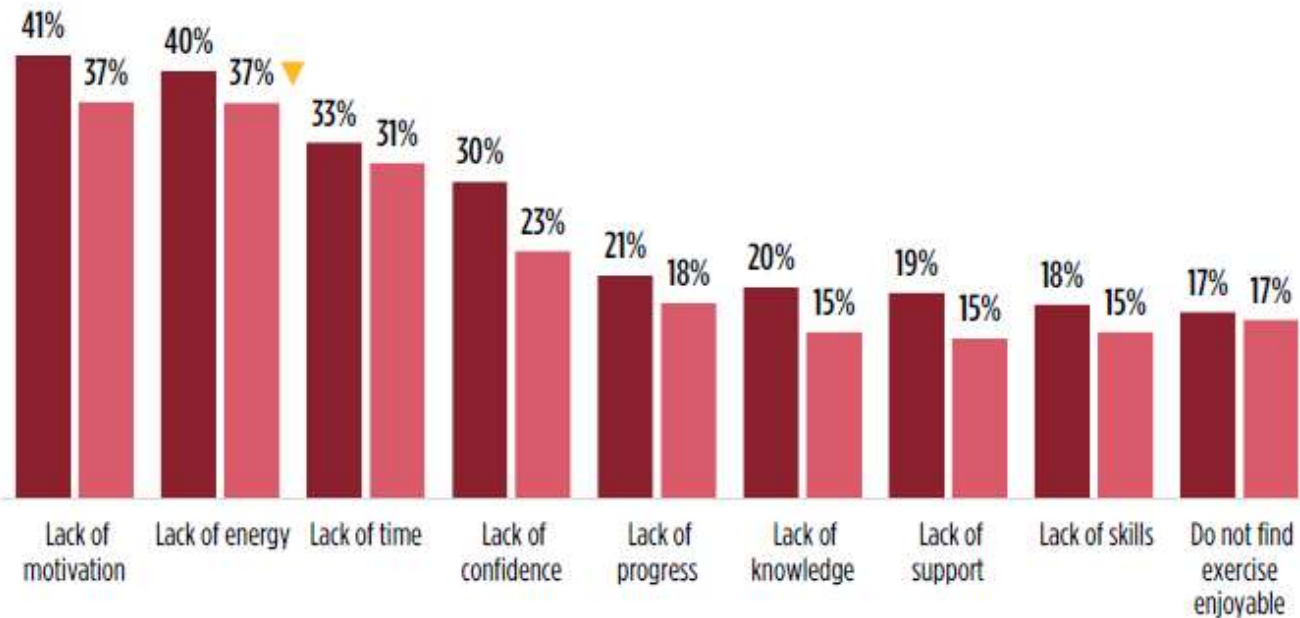
Among Fitness Engaged

▲ ▼ Significant from Millennials at the same life stage (aged 23-27)

■ 18-22 ■ 23-27

Decreased barriers from 18-22 to 23-27

Increased barriers from 18-22 to 23-27



KEY TAKEAWAYS

Gen Z enjoy exercise & are emotionally connected to fitness.

Gen Z are willing to spend money on health & fitness.

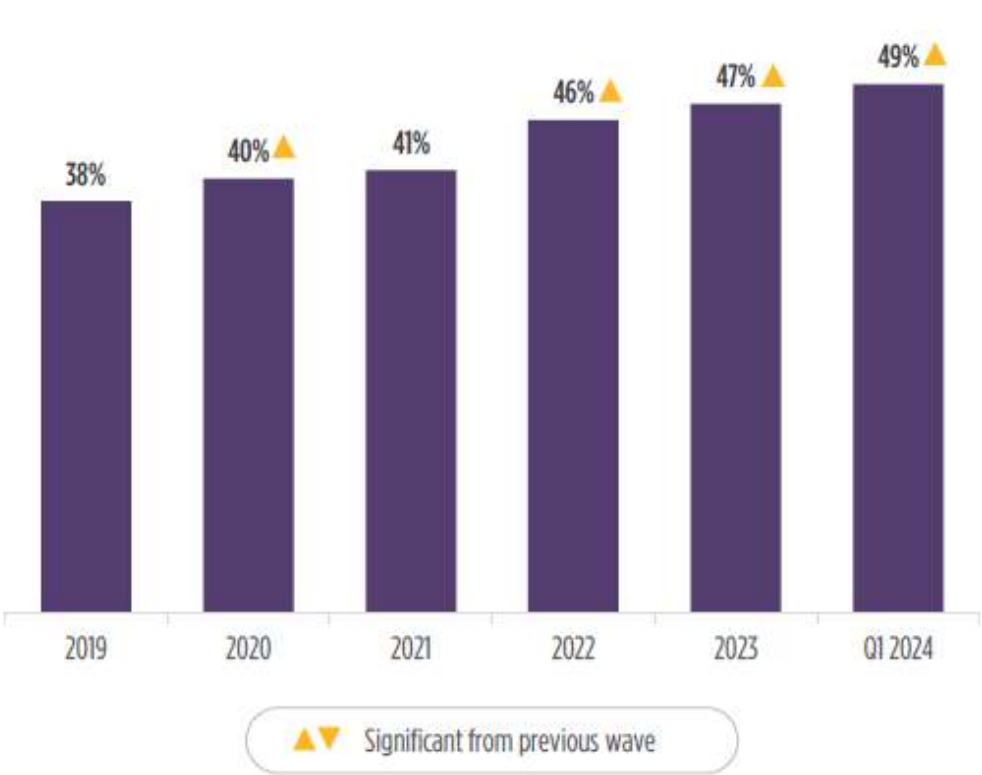
Gen Z view fitness as a means to an end: Better health overall.

MINDFULNESS

What Drives Gen Z Behavior

Mindfulness has become a mainstream health habit. Today 1 in 2 Americans engages in some form of weekly mindfulness practice.

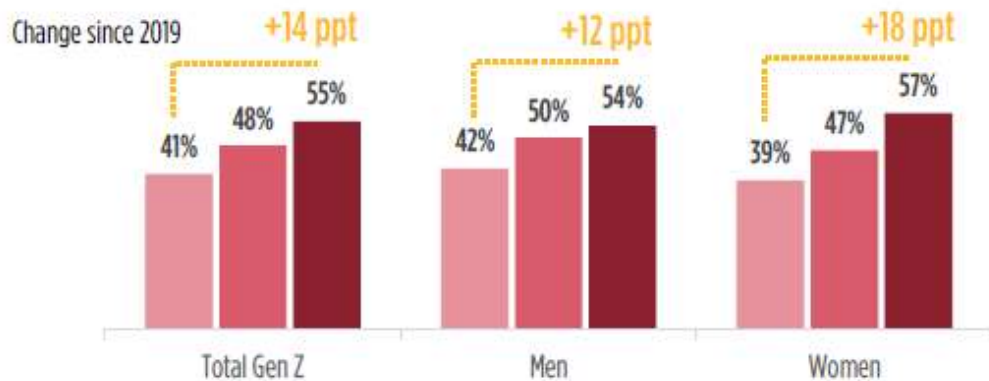
Mindfulness* Market Size
% mindfulness engaged
Among the U.S. general population aged 13+



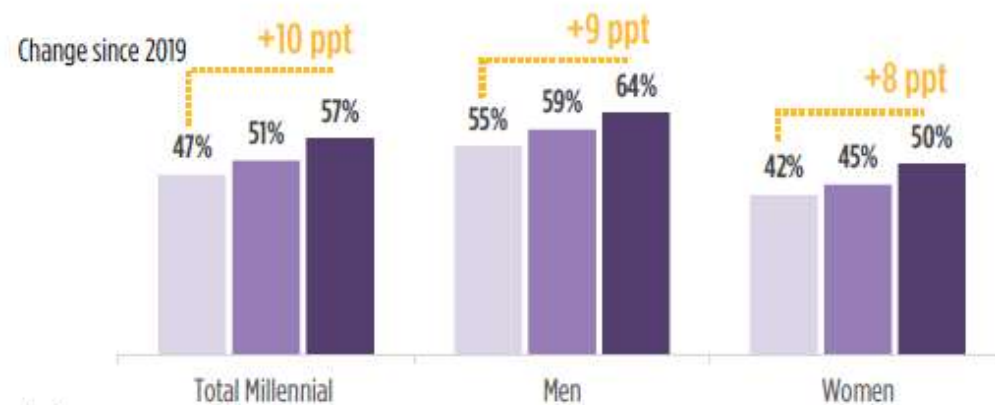
While mindfulness is a trend across all age groups, growth is most dramatic among Gen Z women.

Mindfulness Engagement by Generation

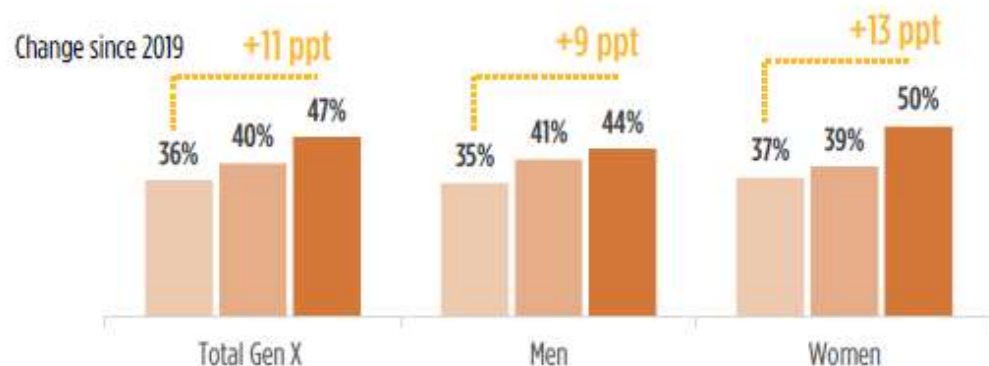
2019 2021 Q1 2024



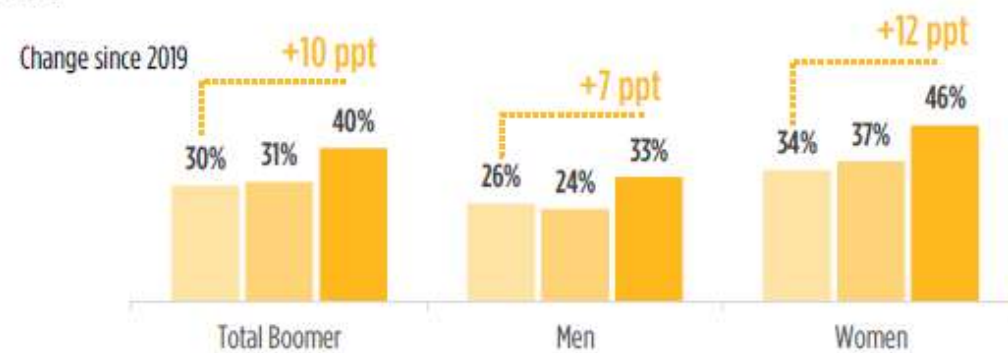
Gen Z



Millennials

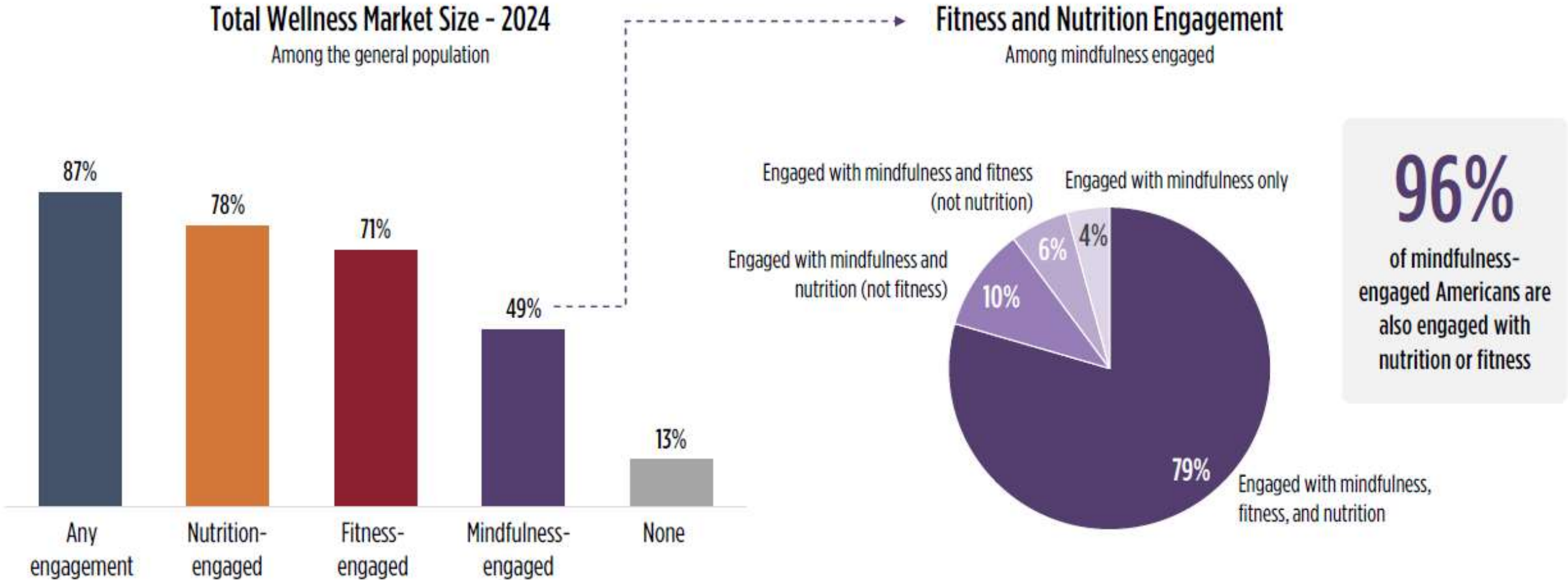


Gen X



Boomers

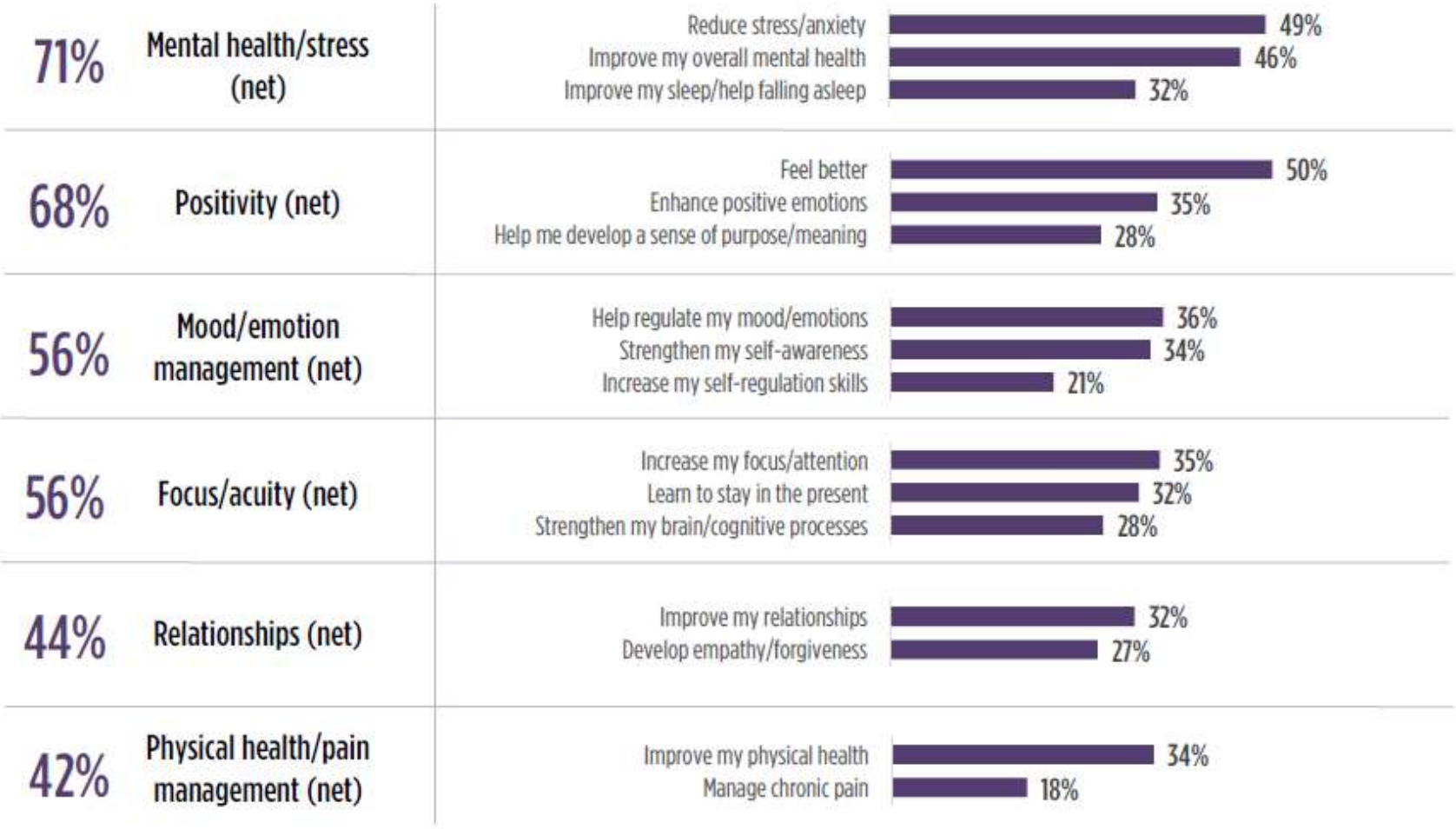
The interest in mindfulness continues to come from those already engaged with their health. Almost all mindfulness-engaged consumers are engaged with fitness or nutrition – typically both.



Stress reduction is at the center of most consumers' mindfulness benefits, a specific and tangible benefit that helps them feel better day after day.

Mindfulness Motivations

Among mindfulness engaged



Mindfulness helps practitioners deal effectively with everyday stressors, from work to personal relationships.

“Mindfulness makes me feel like whatever day comes before me, it’s going to be great. Nothing is going to bother me. I do it so that I can feel this way.

—Jed, male, 38

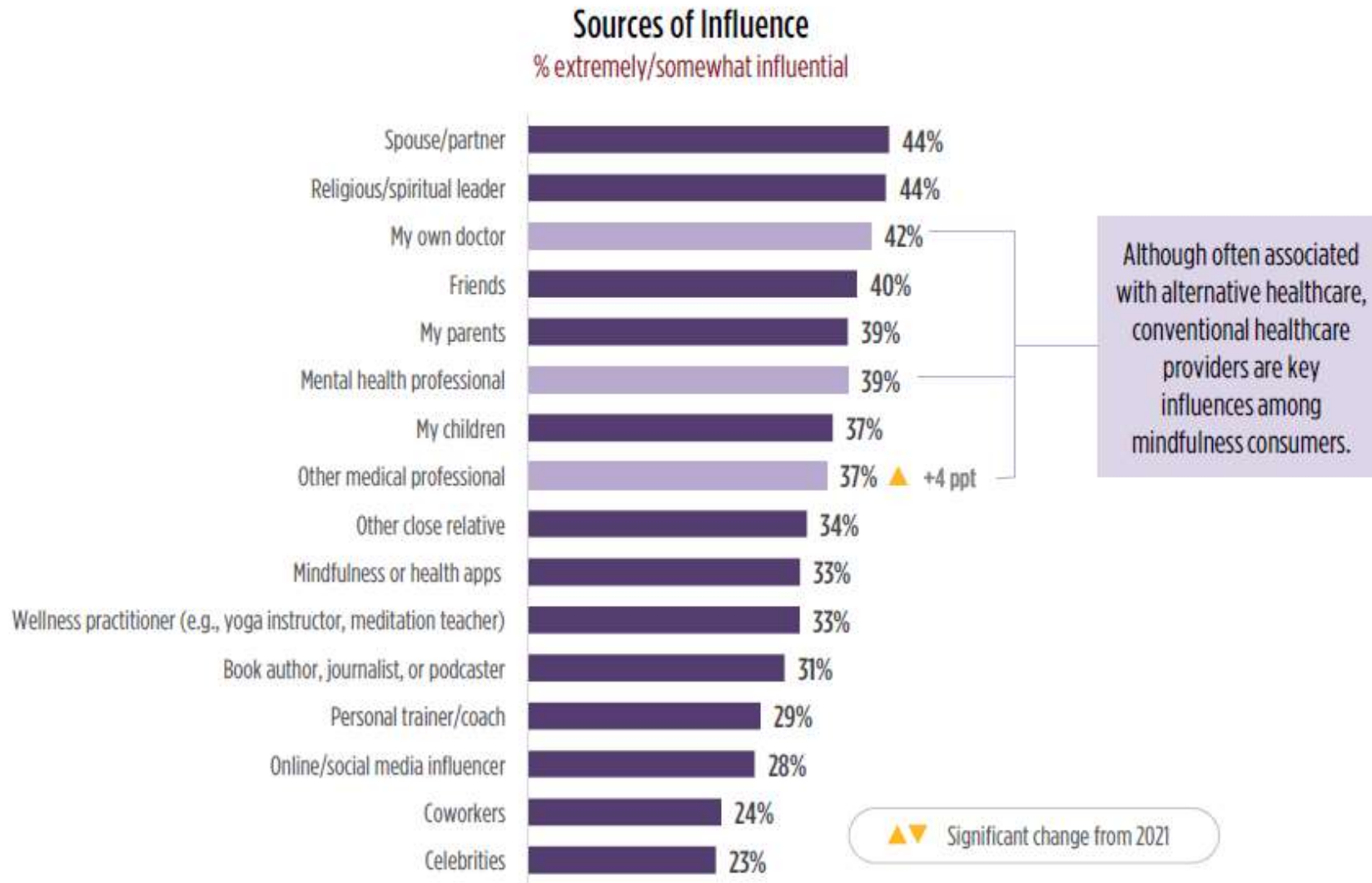
“I’m finding different ways to regulate my mental health as well, more effective ways of dealing with everyday stress, like my job.

—Jeff, male, 41

“Rather than me lashing out or being upset at somebody, I can take that thought and put it in a journal and then have that conversation with them later when we’re both not angry.

—Sasha, female, 23

Many consumers come to mindfulness on the advice of healthcare professional, and religious leaders also play a significant role for many.



Many are recommended mindfulness by a healthcare professional to meet a particular need.

“

I spoke to a doctor, and they told me there is this option that helps a lot of people with their anxiety. And I thought that's something I at least want to try. And I fell in love with it.

—Sasha, female, 23

“

I started [meditating] from the recommendation of a therapist. It's something I hadn't thought of seriously until she brought it up. Mindfulness has helped me not get bothered and irritated by these little things.

—Jeff, male, 41

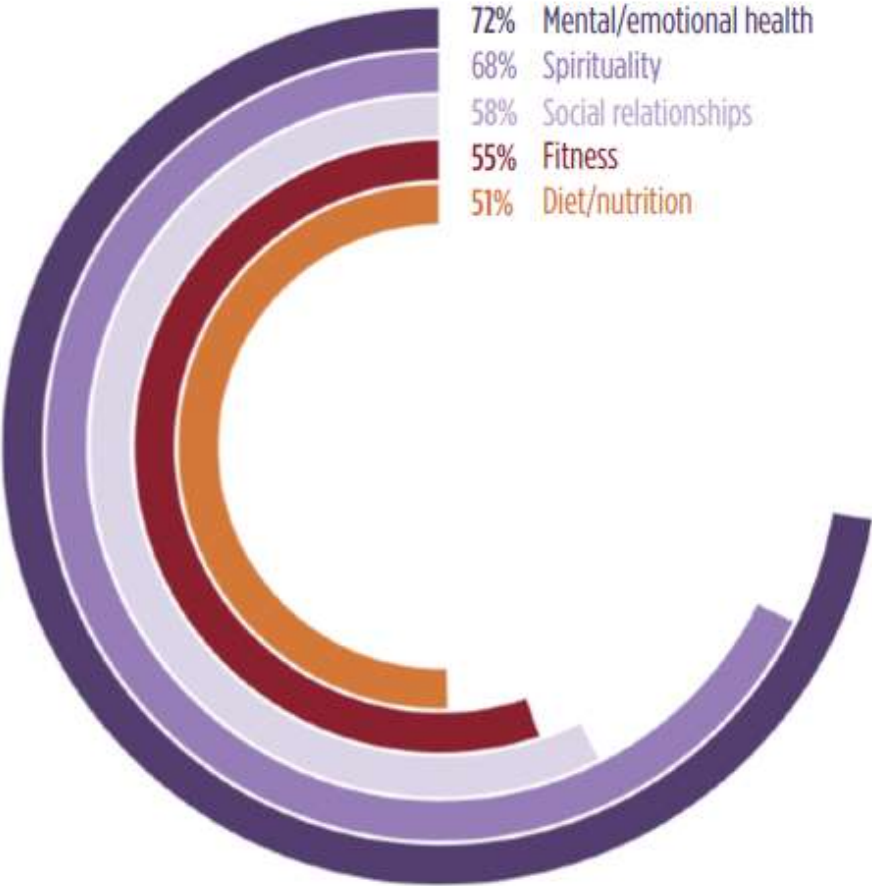
THE CONNECTION

How Mindfulness Influences Health Habits

While mindfulness is most closely connected to mental and emotional health, consumers also tie it to physical health, particularly fitness. This is most pronounced among younger consumers.

Connection between Mindfulness and Other Areas of Life

% extremely/very connected
Among mindfulness engaged



Mindfulness, Fitness, and Nutrition

% agree strongly/somewhat
Among mindfulness engaged

68%

Mindfulness helps me stay motivated to meet my other health goals
Higher among Gen Z, Millennials

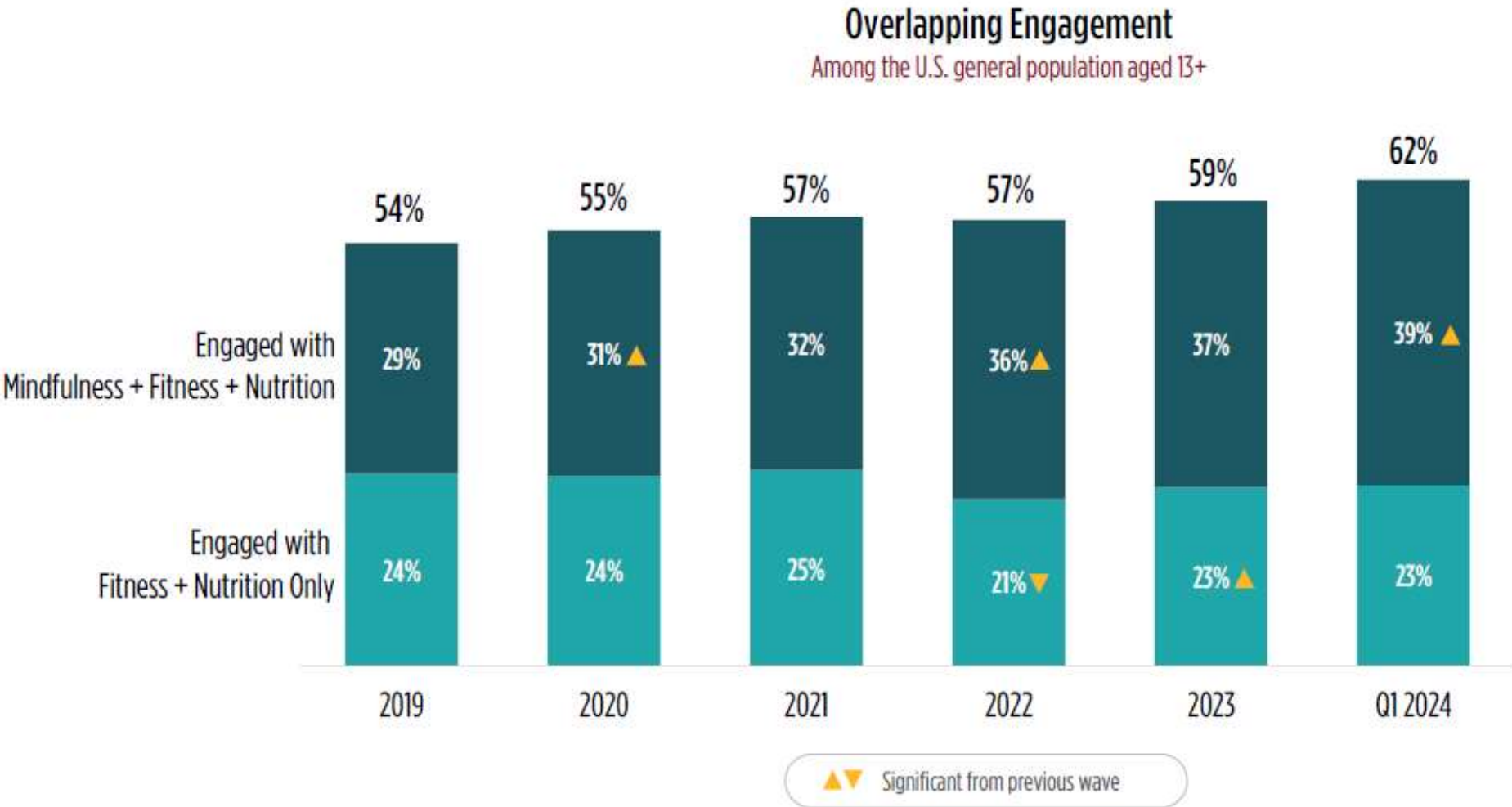
Mindfulness has changed how I approach fitness for the better
Higher among Gen Z, Millennials

57%

56%

Mindfulness has changed how I approach food and eating for the better
Higher among Gen Z, Millennials

Because mindfulness is growing among those already engaged with health, we compared two highly engaged groups to understand how the addition of mindfulness impacts fitness and nutrition.



Triple engagement is becoming a key characteristic of how Millennial and Gen Z consumers approach health and wellness.

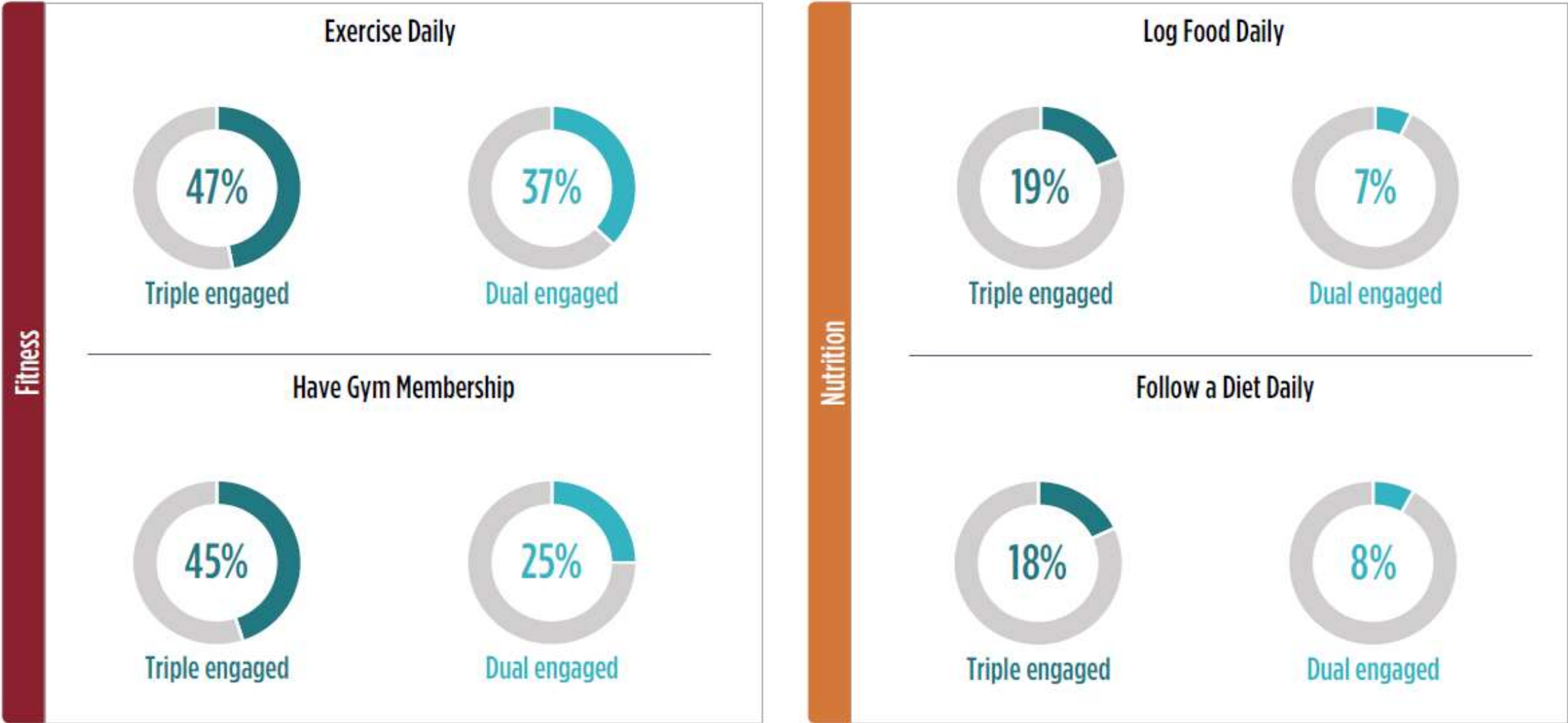
Triple Engaged

More likely to be:
Gen Z and Millennials
Hispanic or Black/AA
Parents with children in home

Dual Engaged

More likely to be:
Boomers
White
Married or living alone
No children in home

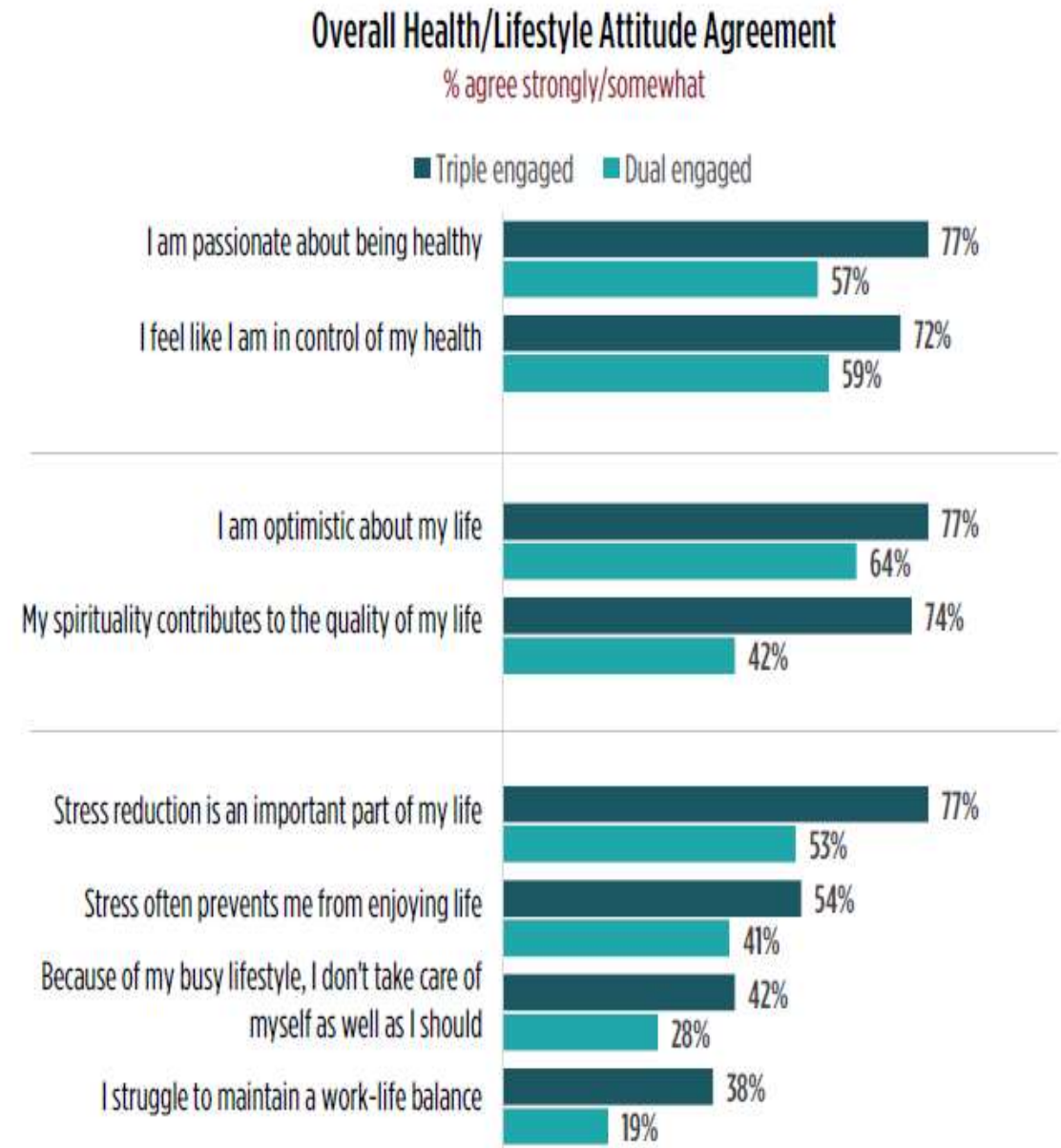
Consumers who layer mindfulness onto fitness and nutrition engagement are more physically active and more involved with their nutrition than even dual-engaged consumers.



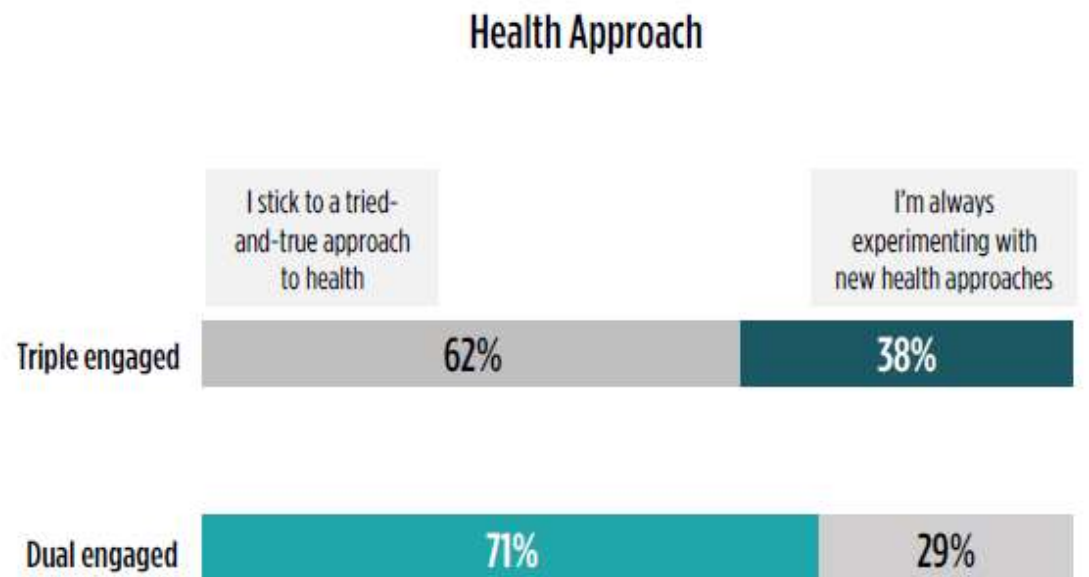
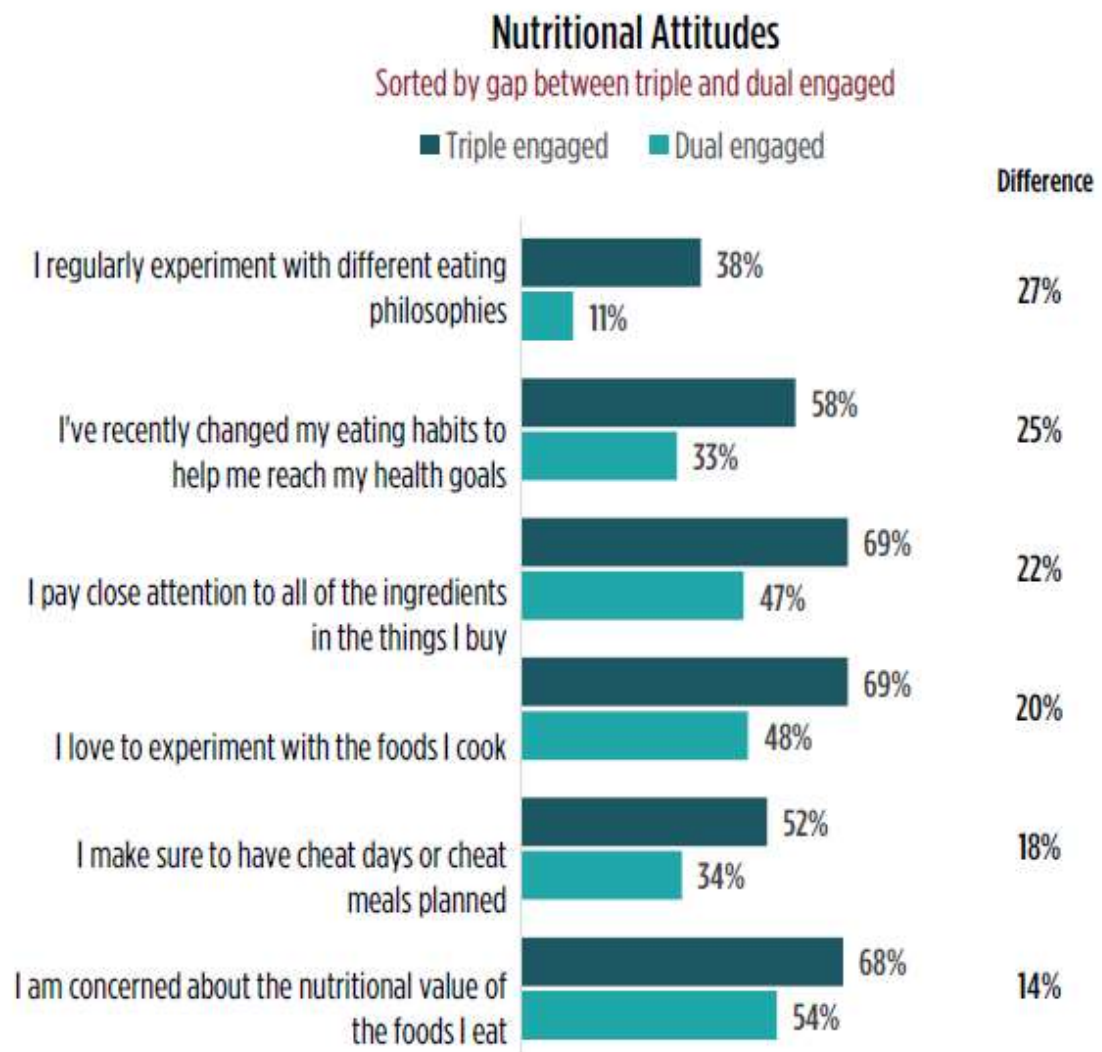
Triple engaged consumers are more emotionally invested in their health habits and optimistic about life.

Despite feeling more stress, they are more likely to actively manage it.

- **Mindfulness consumers recognize that stress and feeling overwhelmed are often what holds them back from their fitness and nutrition goals.**
- **By building awareness and self-reflection, mindfulness also helps practitioners recognize that when they don't prioritize fitness and diet, both mental and physical health suffers**



Even compared to those engaged with both fitness and nutrition, adding mindfulness is related to greater openness to experimentation with a focus on nutrition.

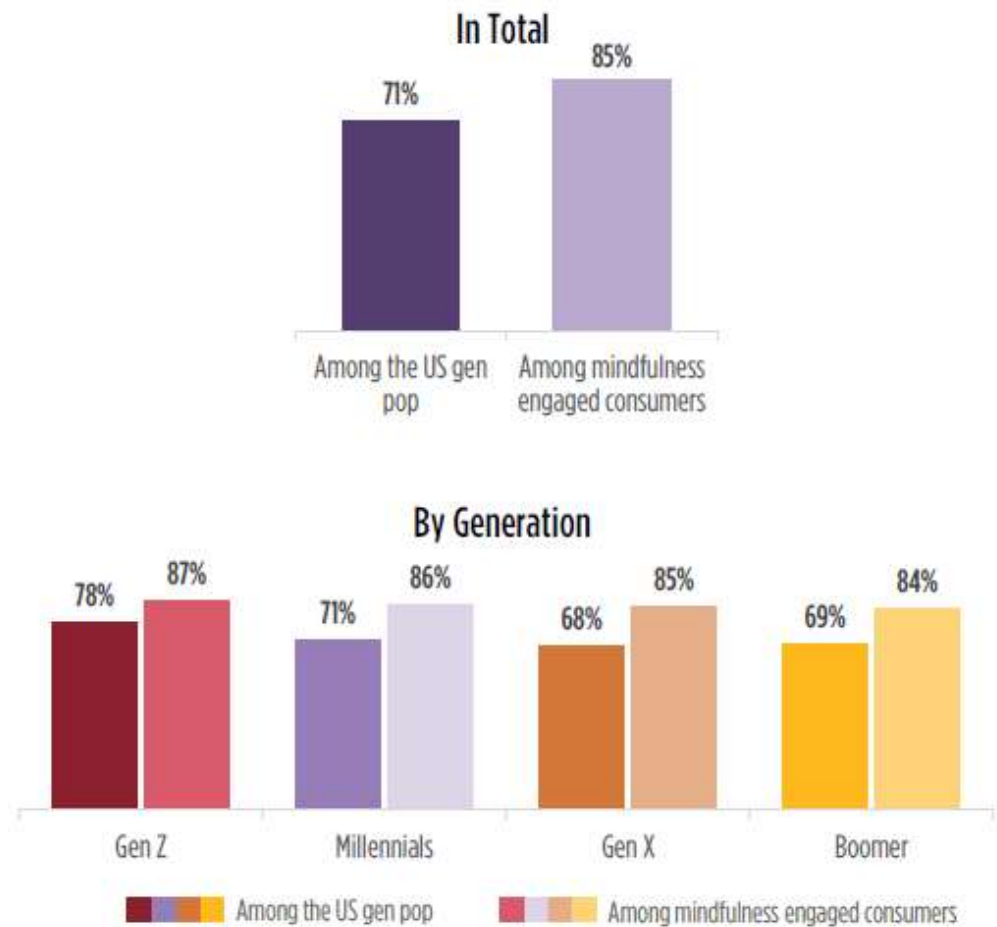


“I’m trying to change my whole outlook and try new things. I’m not trying to be a picky kid. I’m trying to try everything.”
—Roxanna, female, 52

Mindfulness consumers are much more likely to engage with fitness. Exercise and mindfulness have similar benefits, so for many consumers they are more closely connected than mindfulness and eating.

Fitness Engagement and Mindfulness Today

% fitness engaged



Set It Up

- Morning exercisers enjoy how fitness sets them up with a positive, energetic attitude.
- Some combine mindful stretching with meditation for a boost to mind and body.

“

I'll go out and walk on my own in the mornings, it's very quiet. It's easy to have a quick walk and feel great, it's peaceful.

—Jed, male, 38



Reset & Re-center

- Mindful exercisers turn to fitness to transition from work to home.
- They use exercise to work out small irritations and stressors from the day.

“

It's a way to decompress. I like pushing myself and I feel like fitness gives you that. I like to see that progress.

—Adam, male, 36



Let It Go

- Exercise is great for releasing stress, anger, and other tense emotions.
- Mindful movement in the evening helps relax the body and mind before bed.

“

It helps me express myself where I can really take my emotions and put it toward fitness whether I'm angry or sad.

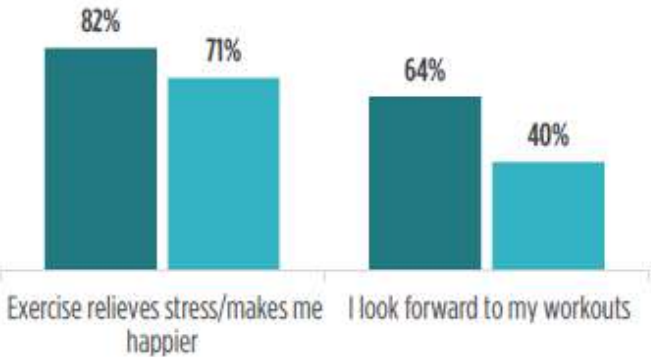
—Sasha, female, 23

Mindfulness consumers, regardless of age, are more invested in their fitness routines emotionally, financially, and in terms of time, even compared to dual-engaged consumers.

■ Triple engaged ■ Dual engaged

Fitness is fun

% agree strong/somewhat



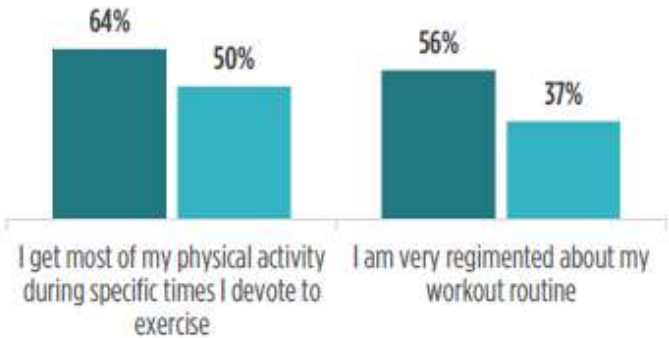
“

Outside of the look I just enjoy being active. It's always beneficial for my mental health. It's always been a good outlet for me too.

—Lacey, female, 34

Fitness requires dedicated time

% agree strong/somewhat



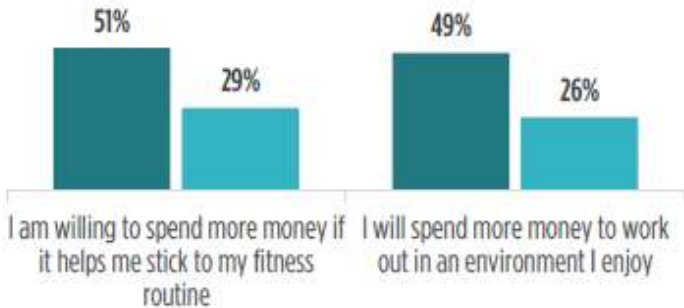
“

It's also self-discipline just like anything in life, just sticking to your goal. Everyone's busy, so don't tell me you don't have 30 minutes to go the gym.

—Adam, male, 36

Fitness is worth spending money on

% agree strong/somewhat



“

I have a workout room at home – that's my time. Where I live the gyms are just too far away. Or the ones that are close, the fees are a little bit high, and they don't provide the equipment that I like, so it's not a good match. I'm very specific on certain equipment.

—Anne, female, 40

KEY TAKEAWAYS

Mindfulness increases fitness & nutrition engagement.

Those who engage in mindfulness tend to view health more holistically, and thus are more devoted to it.

The oldest Gen Z are still solidifying their health & fitness habits which leaves room to harness their spending potential as they move into more stable life stages.

*Gen Z view fitness as a means to and end: **Better health overall.***

1

Gen Z bring a distinctive focus on mindfulness, mental health, and mood to how they approach both fitness and food. They care about how products and behaviors make them feel in a way that is different from Millennials at the same life stage.

2

The oldest Gen Z are still solidifying their habits in both fitness and nutrition, which leaves some white space for harnessing their spending power as they move into a more stable life stage.

3

Younger Gen Z need fitness tools that help them build confidence and routines, especially in the transitional years when many drop fitness. But as they get older, convenience-oriented solutions for external demands will become more important.

4

In terms of nutrition, Gen Z want it all – quick, easy, tasty, nutritious – but also cheap. Gen Z needs inexpensive meal solutions that can fuel the body and boost the mood.

WHAT DOES THIS MEAN FOR THE GYM?

Gen Z are more health engaged at younger ages than previous generations.

They already connect fitness with health.

By engaging with fitness centers associated with healthcare organizations, they can further connect fitness with overall health.

Connecting their fitness program with their overall health goals should be a priority.

Personalization is expected by consumers in other realms. How can we bring that to the fitness experience?

CAUTION: Will want to see other exercisers in their age range in a facility → need to attract a population of younger exercisers.

WHAT DOES THIS MEAN IN THE GYM?

Strength is a focus, but cardio is still part of the routine.

Lower body strength is especially important, particularly in females.

Cardio can be anywhere; Variety of strength equipment (and equipment overall) is one thing that gyms provide.

Personalization in the cardio space may make this equipment more appealing in the future.

Motivation is still a key barrier; working out alone outside or at home generally doesn't motivate people like working out in a gym.

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NEW LOWER BODY HAMMER STRENGTH EQUIPMENT



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CARDIO PERSONALIZATION



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ACTIVITY

If you operate a Fitness Center, what could you do to be more attractive to younger exercisers?

What could we do as an industry to drive retention in younger generations?



LifeFitness

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