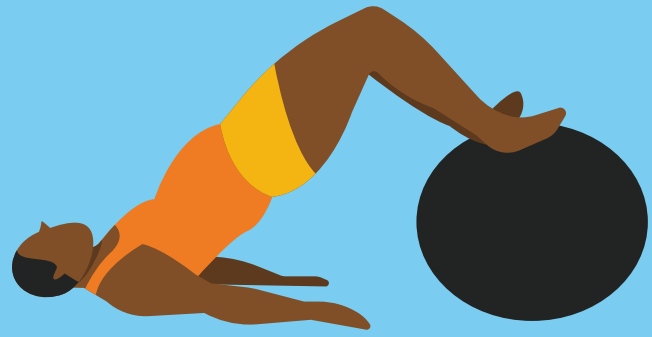


FITNESS MARKET IN 2019

Top Traits

LES MILLS CLUB

This is the result of Les Mills club data from an online survey in 2019. People from 22 countries participated in 13 languages. Over 16,000 responses, of which over 12,000 form the basis of most of the information.



36.4 IS
THE AVERAGE
OF ALL
MEMBERS

30.2 IS
THE AVERAGE
OF NEW JOINERS

OVER HALF OF NEW MEMBERS ARE UNDER 30

Millennials and Generation Z take care of their health more than their parents. Millennials were born from 1979 to the mid-1990s. Generation Z was born between the mid-1990s and 2010.

32% OF THE TOTAL ADULT POPULATION ATTENDS GYMS

- Have no interests exercising: 25%
- Member: 24%
- never been: 22%
- lapsed: 21%
- casual member: 8%



80% OF ALL THOSE ATTENDING A GYM ARE MILLENNIALS AND GEN Z

- Gen Z (1994-2002) : 35%
- Millennials(1979-1993): 45%
- Gen X: (1964-1978): 14%
- Baby bommers(1949-1963): 6%



FITNESS MARKET IN 2019 (PART 2)

Top Traits

MILLENNIALS APPRECIATE TRAINING WITH BALANCE, ROUTINE AND PREVENTION

- Balance : Gen Z(68%), Millennials (70%)
- Routine : Gen Z(64%), Millennials (66%)
- Prevention : Gen Z(60%), Millennials (65%)
- Rejuvenation : Gen Z(61%), Millennials (65%)
- Results : Gen Z(62%), Millennials (61%)
- Challenge : Gen Z(57%), Millennials (55%)
- Social interaction : Gen Z(37%), Millennials (41%)

- Get in / maintain shape (54%)
- Look better / improve your appearance (50%)
- Be stronger (37%)
- Have fun (27%)
- Feel more independent (26%)

REASON FOR EXERCISE FOR GEN Z

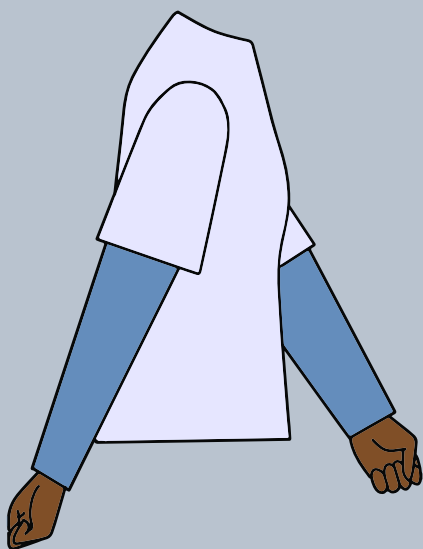
54% Gen Z say getting and staying in shape is a reason to exercise

NEW GENERATIONS
LIKE TO TRY NEW
THINGS AND USE THE
FULL RANGE OF
EXERCISES THAT
CLUBS HAVE TO
OFFER



80% of Gen Z and Millennials
take part in both gym activities and
fitness classes

79% OF THOSE WHO PRACTICE GYM-TYPE ACTIVITIES ARE EITHER GENERATION Z OR MILLENNIALS

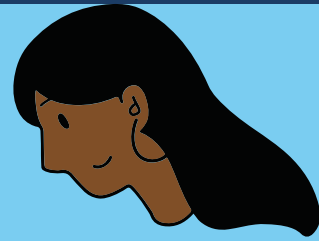


- Gen Z: 35%
- Millennials: 44%
- Gen X: 14%
- Baby boomers: 6%
- Undisclosed: 1%

FITNESS MARKET IN 2019 (PART 3)

Top Traits of

81% OF THOSE WHO TAKE PART IN FITNESS CLASSES ARE EITHER GEN Z OR MILLENNIALS



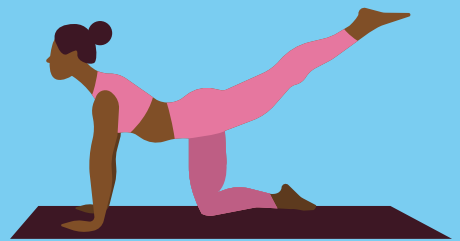
- Gen Z: 35%
- Millennials: 46%
- Gen X: 13%
- Baby boomers: 5%
- Undisclosed: 1%



OVER HALF OF ALL MEMBERS WANT MORE GYM TIME

Gen Z is the most active member category, with 87% exercising three or more times per week. And yet, they always want more.

GEN Z AND MILLENNIALS HAVE A FRUSTRATION WITH THEIR GYM ATTENDANCE FREQUENCY. BASED ON THE MARKET, THIS DISSATISFACTION FROM THREE THINGS



- They have a busy schedule and so cannot go to the gym as they would like to go
- Their facility being too crowded
- The opening hours inconvenient

- Multipurpose gym (52%)
- At home (27%)
- Dedicated single activity studio (20%)
- Personal training studio (17%)
- Community (15%)
- University (15%)
- Free gym (apartment block) (15%)
- Low cost gym (10%)

MULTIPURPOSE FACILITIES GARNER THE LARGEST SHARE OF WALLET FROM PARTICIPANTS OF GROUP WORKOUTS TO MUSIC

