



# The Gen Z Fitness Consumer

The Complete Guide

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# Methodology and Disclaimer

**An Online Survey among Health and Fitness Club Members/Users** within the top 40 MSAs across the U.S.

- ✓ **Audience identification.** Respondents were recruited using an online panel and identified based on screening questions to profile individuals who meet specific target audience criteria (Interest in living an active lifestyle and health club/gym/studio membership status).
- ✓ **Survey distribution and collection.** Working with ClubIntel's panel partner, an email invitation was sent to approximately 6,700 targeted consumers with a link to the survey. Geographically, the top 40 MSAs across the U.S. were sourced.
- ✓ **Survey responses.** In all, 2119 consumers met the screener qualifications to participate in the study. These responses were carefully monitored to elicit a nationally representative sample and significant data points for analyzing and creating consumer segment profiles.
- ✓ This report details findings from those who are 18-24 years old and fall in the Gen Z segment. In addition to analyzing Gen Z data from the online survey, secondary sources were considered to provide a full profile of their values and behaviors.

## Disclaimer

The statistical information contained in this report is representative of the individuals responding to this survey. All reasonable efforts were taken by ClubIntel to assure data comparability within the scope and limitations of the reporting process. However, the data contained in this report is not necessarily based on third-party audited data. The statistical validity of any given number varies depending on sample sizes and the amount of consistency among responses for any data point. The data in this survey is representative of the sentiments reported by the targeted respondents.

ClubIntel and ABC Fitness Solutions, therefore, make no representations or warranties with respect to the results of this study and shall not be liable to clients or anyone else for any information inaccuracies, or errors or omissions in content, regardless of the cause of such inaccuracy, error or omission. In no event shall ClubIntel or ABC Fitness Solutions be liable for any consequential damages.



# Executive Summary

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# Gen Z has reached a global disposable income of \$360 Billion

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They make up 40% of the global spending population and are expected to make up over 41 million U.S. digital buyers.

Generation Z, also known as "Zoomers," is the most recent generation to enter adulthood. Born between 1997 and 2012, this group is known for their love of technology and their desire for social and environmental justice. As they come of age, their attitudes and behaviors toward health and fitness are also beginning to take shape. This report delves into the health club and gym behavior of Gen Z, exploring their preferences, motivations, and challenges when it comes to staying fit and healthy. By analyzing the data and trends related to this generation's fitness habits, we can gain valuable insights into how health clubs and gyms can better serve and engage this important demographic.

# Gen Z – Values and Characteristics

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Gen Z is comprised of “Digital Natives” who have never known a world without the Internet or mobile devices.

Generation Z have grown up in a world that is increasingly connected through technology and social media, and this has shaped their values and beliefs.

Some common values and characteristics of Gen Z include:

- 1. Diversity and inclusivity:** Gen Z is known for valuing diversity and inclusivity. They are more likely to embrace different cultures, lifestyles, and identities than previous generations.
- 2. Social justice and activism:** Many members of Gen Z are passionate about social justice issues such as racial equality, gender equality, LGBTQ+ rights, and climate change. They are often vocal and active in their support of these causes.
- 3. Individuality and self-expression:** Gen Z values individuality and self-expression, and they often use social media and other platforms to showcase their unique personalities and interests.
- 4. Entrepreneurship and innovation:** Gen Z is known for being entrepreneurial and innovative, with many members starting their own businesses or pursuing non-traditional career paths.
- 5. Work-life balance:** Unlike previous generations, Gen Z values work-life balance and often prioritize flexibility and autonomy in their work arrangements.

Of course, it's important to remember that these are generalizations, and not all members of Gen Z will share these values or characteristics.

# Appealing to the Gen Z fitness consumer

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Health Club operators can address Gen Z values and preferences through programs and services.

To appeal to the Gen Z fitness consumer, health club operators can focus on providing programs and services that align with their values and preferences. Here are some strategies that health club operators can use to appeal to Gen Z:

- 1. Offer flexible membership options:** Gen Z values flexibility and wants to have options to choose from. Health club operators can offer flexible membership options that fit different lifestyles, such as pay-as-you-go, short-term, or long-term memberships.
- 2. Provide a variety of classes:** Gen Z enjoys trying new things and wants to have options to choose from. Health club operators can offer various classes catering to different interests, including yoga, dance, kickboxing, and high-intensity interval training (HIIT).
- 3. Incorporate technology:** Gen Z is a highly digital generation that values technology and convenience. Health club operators can incorporate technology into their programs and services, such as offering fitness tracking apps, virtual classes, and online coaching.
- 4. Focus on social connection:** Gen Z values social connection and wants to be part of a community. Health club operators can focus on creating a welcoming and inclusive environment that fosters social connections through group classes, social events, and online forums.
- 5. Prioritize sustainability:** Gen Z is a socially conscious generation that values sustainability and environmental responsibility. Health club operators can prioritize sustainability by using eco-friendly materials, reducing waste, and promoting environmentally conscious practices.

Overall, to appeal to Gen Z, health club operators need to focus on providing flexible, diverse, and technology-driven programs and services that foster social connection and prioritize sustainability.

# Marketing to Gen Z

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They care about society and are willing to support brands whose values align with their own.

• **A social media presence is a must.** Social media plays an increasingly important role in purchasing decisions, with Gen Zers more likely to use social media to connect with their favorite brands, seek inspiration, and research products. Most popular platforms include:

- YouTube
- Instagram
- Snapchat
- TikTok

• **Gen Zers embrace mobile payments and digital wallets** to make purchases with apps like Cash App, Venmo, and Apple Pay leading the way.

• **Building Trust is Essential.** Gen Z recognizes inauthenticity when they see it. If operators want to appeal to Gen Z, they need to start building a relationship based on trust.

• **Inclusivity and relatability.** To establish trust, brands must speak Gen Z's language and understand its values. It's time to focus on more inclusive advertising and work with people (whether they are influencers from outside or employees of the club/studio) that are part of Gen Z.

• **In-person connections.** As much as Gen Z knows about technology and is immersed in the online world, they still value in-person communication. Health club/studio marketers should focus on providing hybrid experiences through customer-first cross-channel marketing.

• **Never underestimate the power of a good deal.** Gen Z knows how to search for a great discount and isn't a big fan of "retail" prices, so health clubs need to tailor their sales strategies accordingly.



# Gen Z Fitness Profile

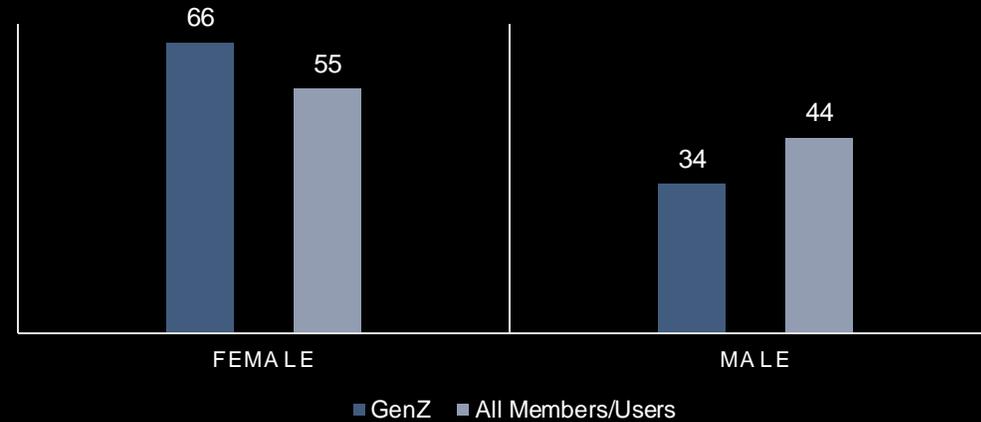
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# Gen Z gender and income

Gen Z respondents in this study skew female at 66%.

As Gen Z enters the workforce, their income levels tend to be lower than Members/Users in general with 38% making less than \$50,000 (compared to the average of 23%). With that said, a significant percentage (38%) make between \$50,000 and \$99,000.

## THE GEN Z FITNESS CONSUMER GENDER



## THE GEN Z FITNESS CONSUMER INCOME

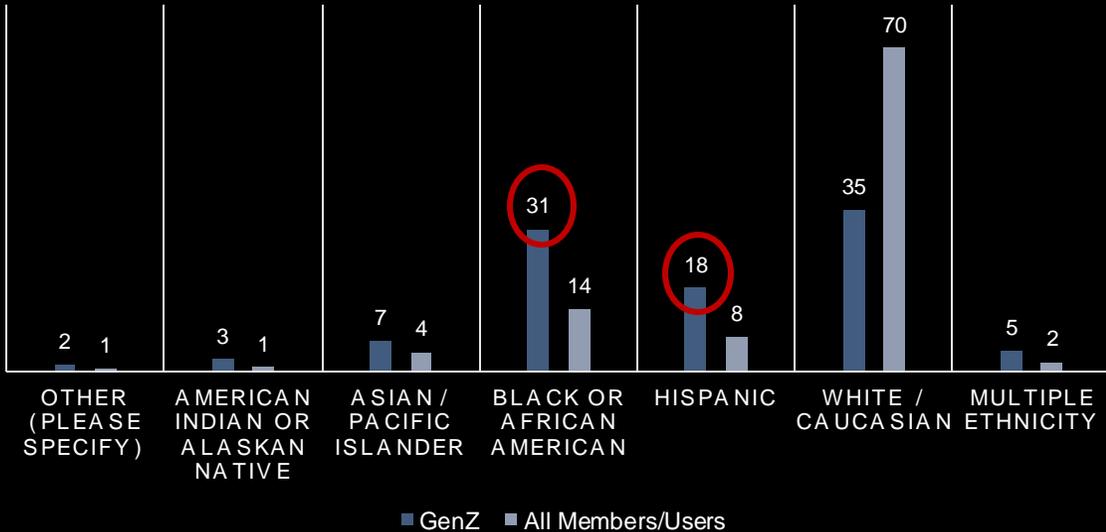


# Gen Z is ethnically diverse and often students

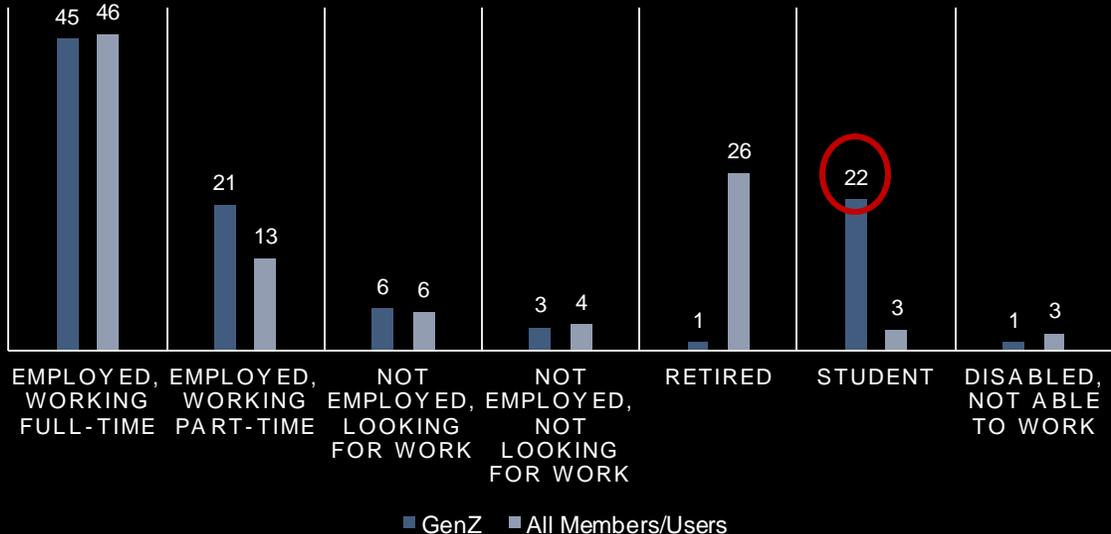
Possibly impacting their household incomes, Gen Z has a strong representation of students in their mix (22%).

In keeping with most demographic studies, the Gen Z fitness consumer is much more diverse than the average consumer. There are over 2x more African American and Hispanic consumers than average.

## THE GEN Z FITNESS CONSUMER ETHNICITY PROFILE



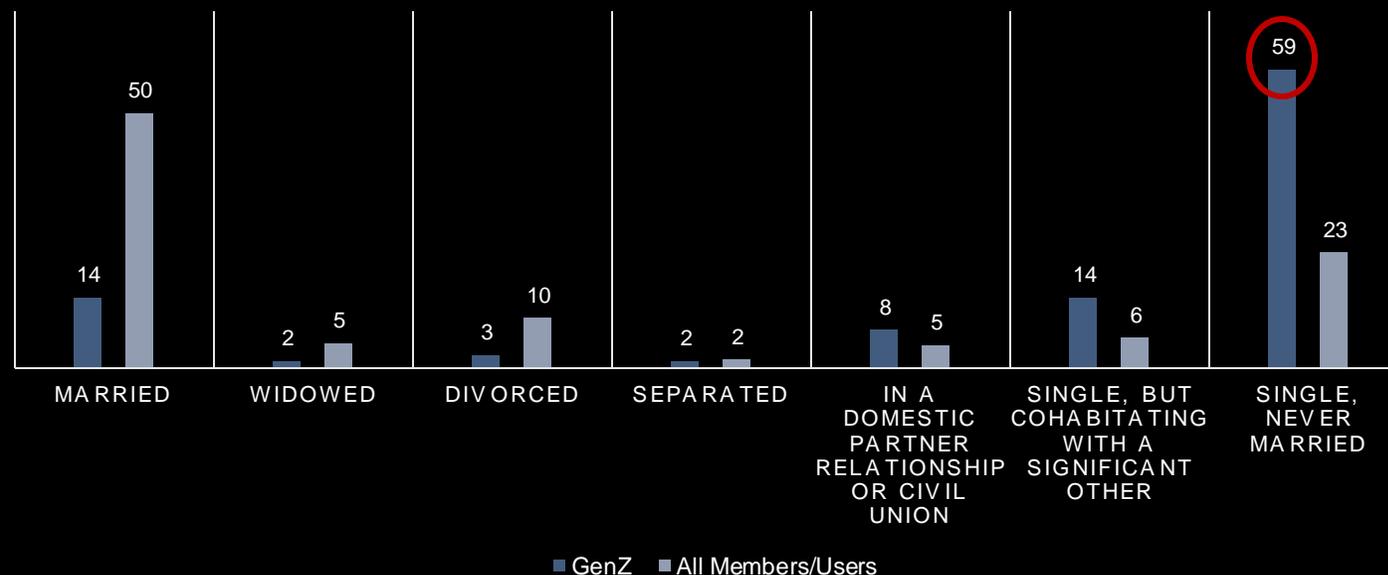
## THE GEN Z FITNESS CONSUMER EMPLOYMENT STATUS



# Gen Z are primarily single

Not surprising given their entry into adulthood, nearly 60% of Gen Z state they are single.

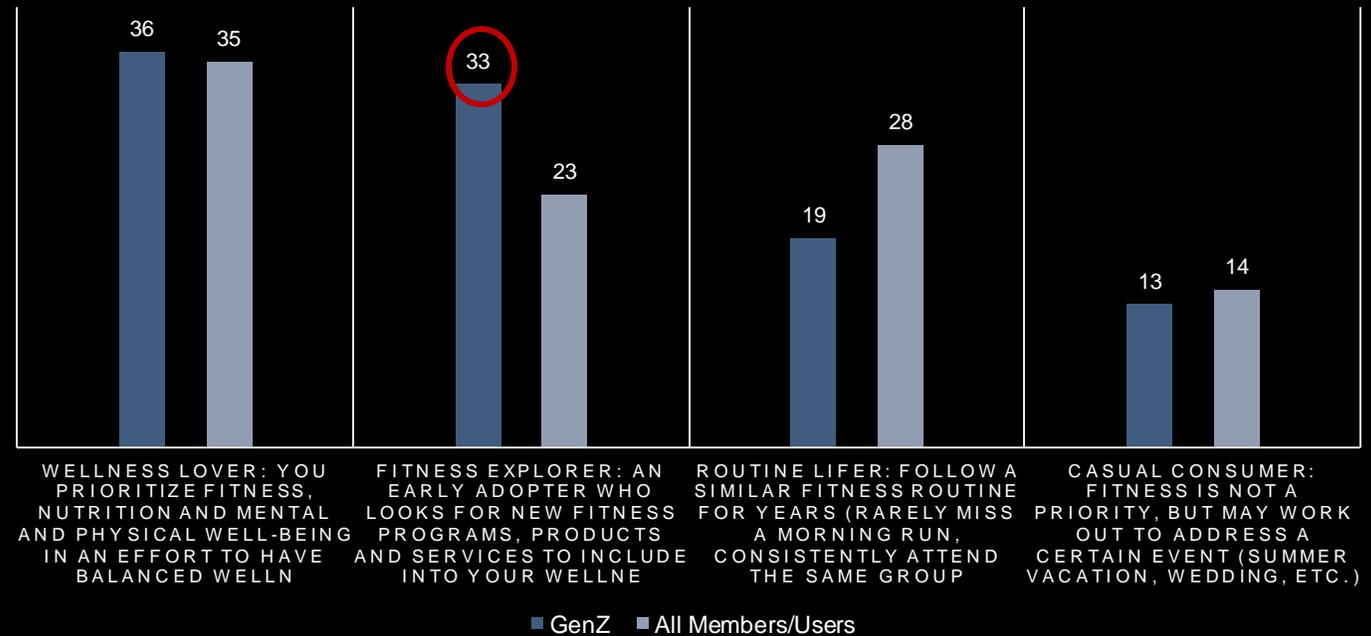
## THE GEN Z FITNESS CONSUMER RELATIONSHIP STATUS



# Gen Z are Wellness Lovers and Fitness Explorers

Noticeably different from the average fitness consumer, 33% of Gen Z fall into the Fitness Explorer fitness profile. This is significantly higher than the average of 23%. As an explorer, these individuals are early adopters looking for new fitness programs and services to incorporate into their regimens.

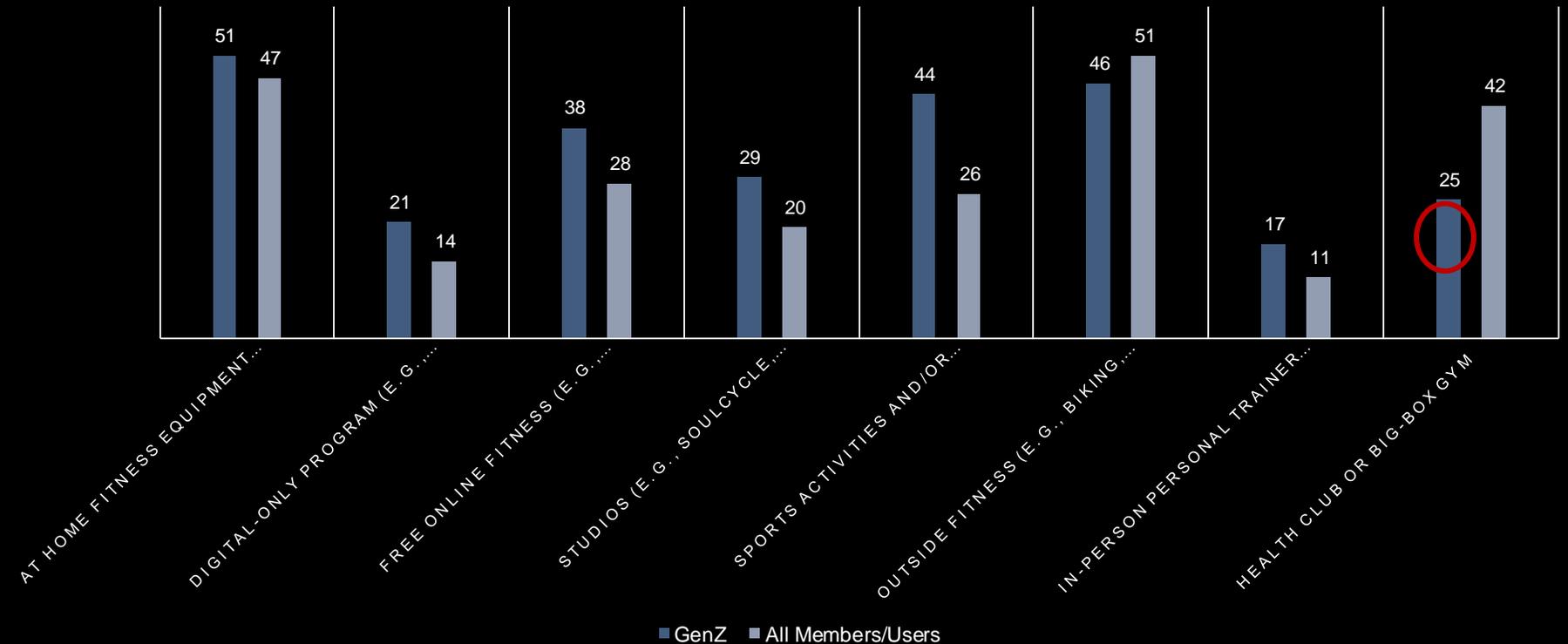
## THE GEN Z FITNESS CONSUMER FITNESS PROFILE



# Gen Z exercise routine: At Home, Outdoors and Communal Sports

At this stage for Gen Z, Health Clubs are an underrepresented workout source with the Gen Z at only 25% (compared to the average of 42%). Preferences include At Home (51%), Outside (46%), Sports Activities (44%), and free online fitness (38%).

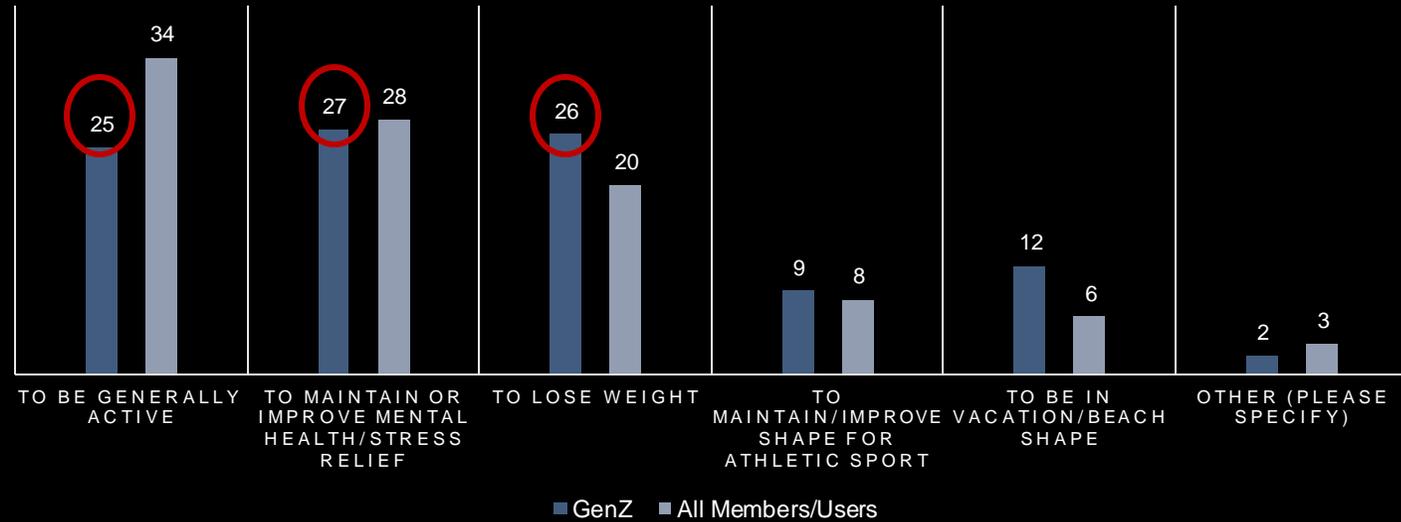
## THE GEN Z FITNESS CONSUMER CURRENT EXERCISE ROUTINE



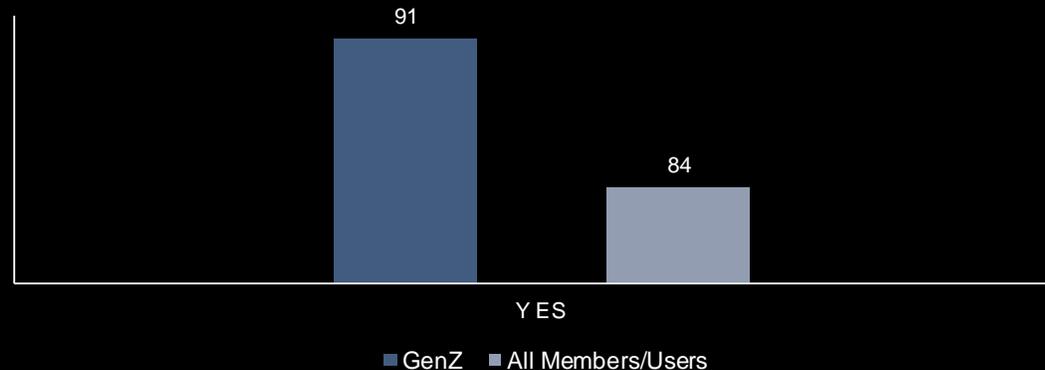
# Gen Z are on track to meet fitness goals

Three goals are prevalent with Gen Z: mental health/stress relief, weight, and being generally active. Of note, however, there are 2x more Zoomers on average, stating their goal is to be in vacation/beach shape.

## THE GEN Z FITNESS CONSUMER HEALTH/FITNESS GOALS



## THE GEN Z FITNESS CONSUMER ON TRACK TO ACCOMPLISH GOALS

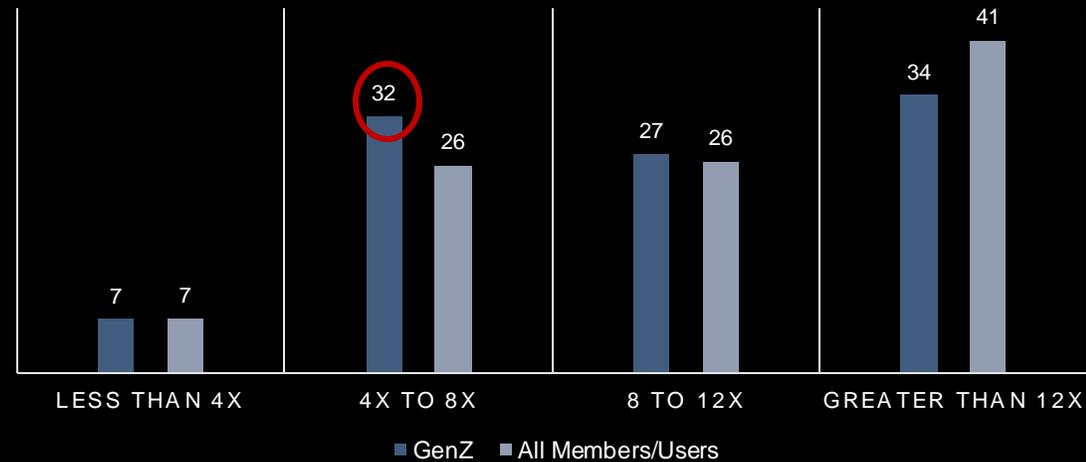


## Gen Z workout frequency is slightly lower and monthly expenses slightly higher

There are higher than average Gen Z working out 4x to 8x a month and fewer than average working out more than 12x a month.

Interestingly, their monthly exercise expenditures skew slightly higher than average with 27% falling in the \$25-\$49 per month range (compared to an average of 22%).

### THE GEN Z FITNESS CONSUMER MONTHLY WORKOUT FREQUENCY



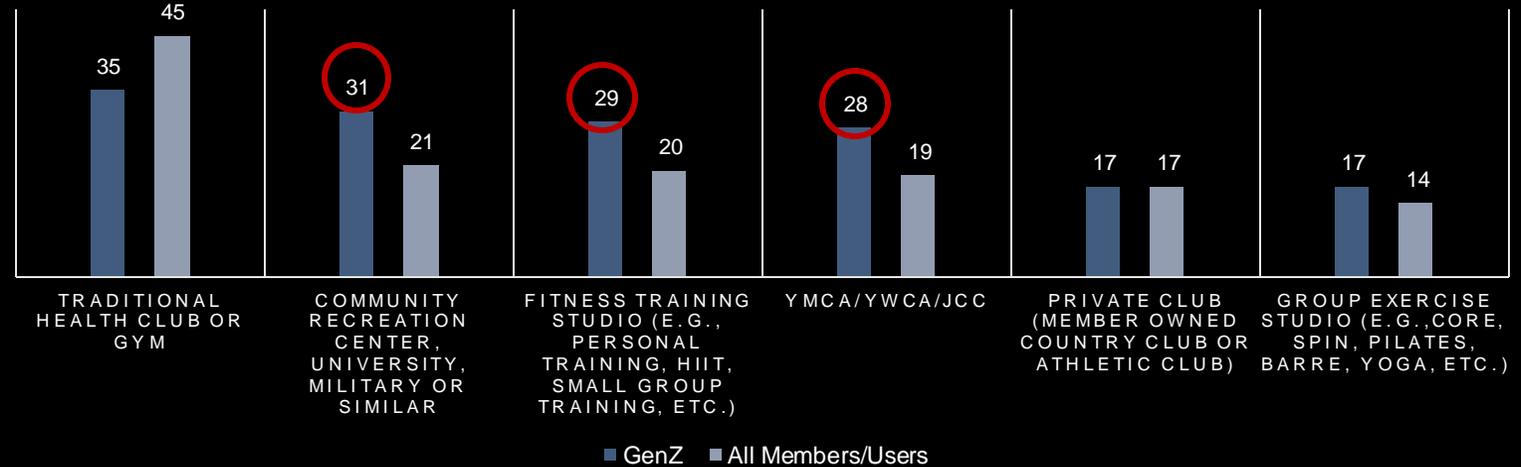
### THE GEN Z FITNESS CONSUMER MONTHLY EXERCISE EXPENDITURES INCLUDES THE COSTS OF MONTHLY DUES, PERSONAL TRAINING FEES, DIGITAL FITNESS SUBSCRIPTIONS, CLASS FEES, ETC.



# Traditional Health Clubs are top facility type for Gen Z membership

However, strong competition for the Gen Z share of wallet is Community Recreation Centers/University/Military health clubs (31%), Fitness Training Studios (29%), and the Y's (28%).

## THE GEN Z FITNESS CONSUMER TYPE OF FACILITY MEMBER OF OR USE



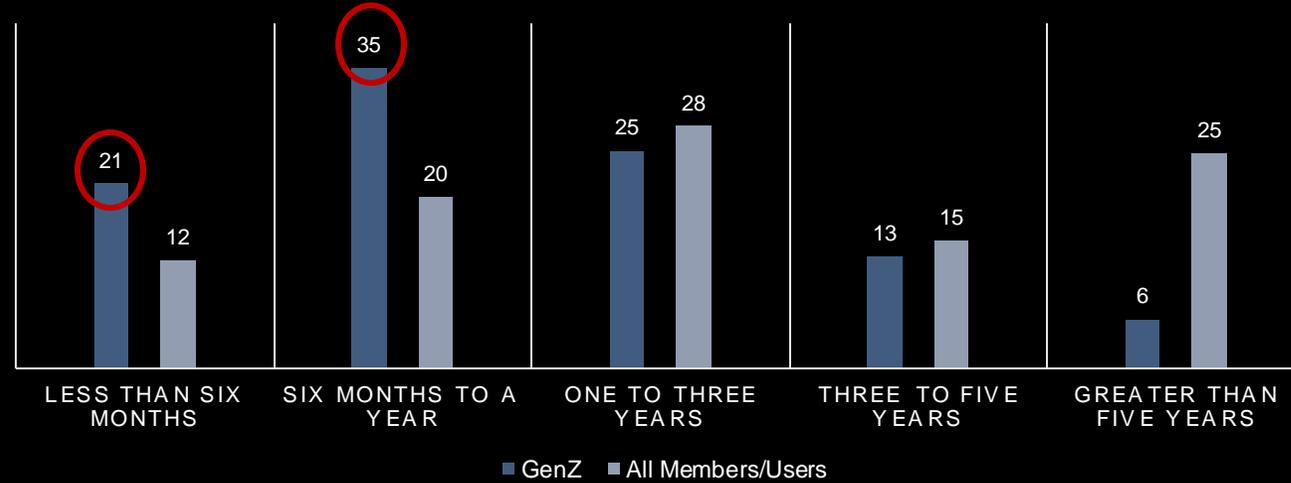
## THE GEN Z FITNESS CONSUMER MONTHLY DUES FOR MEMBERSHIP OR GYM USAGE



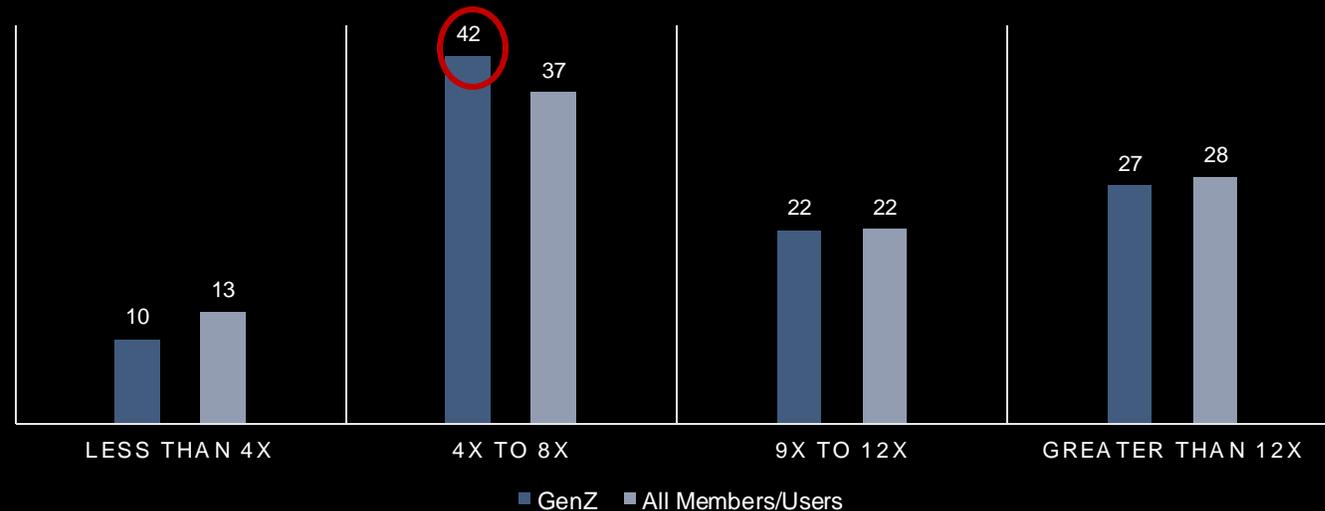
# Gen Z are relatively new members

Over half of Gen Z have joined their health club/studio within the past year. This opens significant opportunities for operators to provide onboarding that is targeted and designed specifically to the values and interests for these new members.

## THE GEN Z FITNESS CONSUMER MEMBERSHIP TENURE



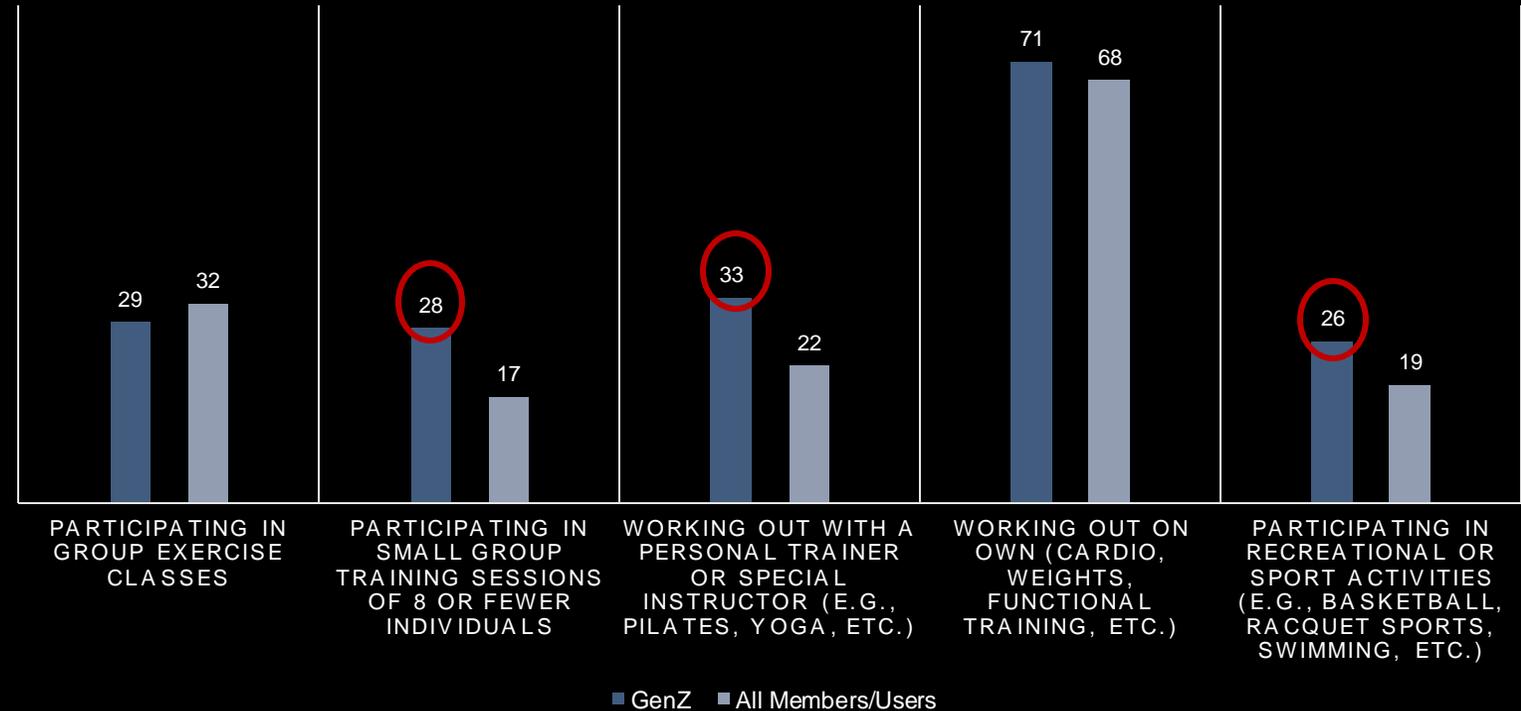
## THE GEN Z FITNESS CONSUMER MONTHLY USAGE



# Gen Z prefer working out on their own

But there's significant interest in small group training, personal training, and recreational/sports activities.

## THE GEN Z FITNESS CONSUMER PRIMARY ACTIVITY AT GYM OR STUDIO



# Creating Value with the In-club Experience

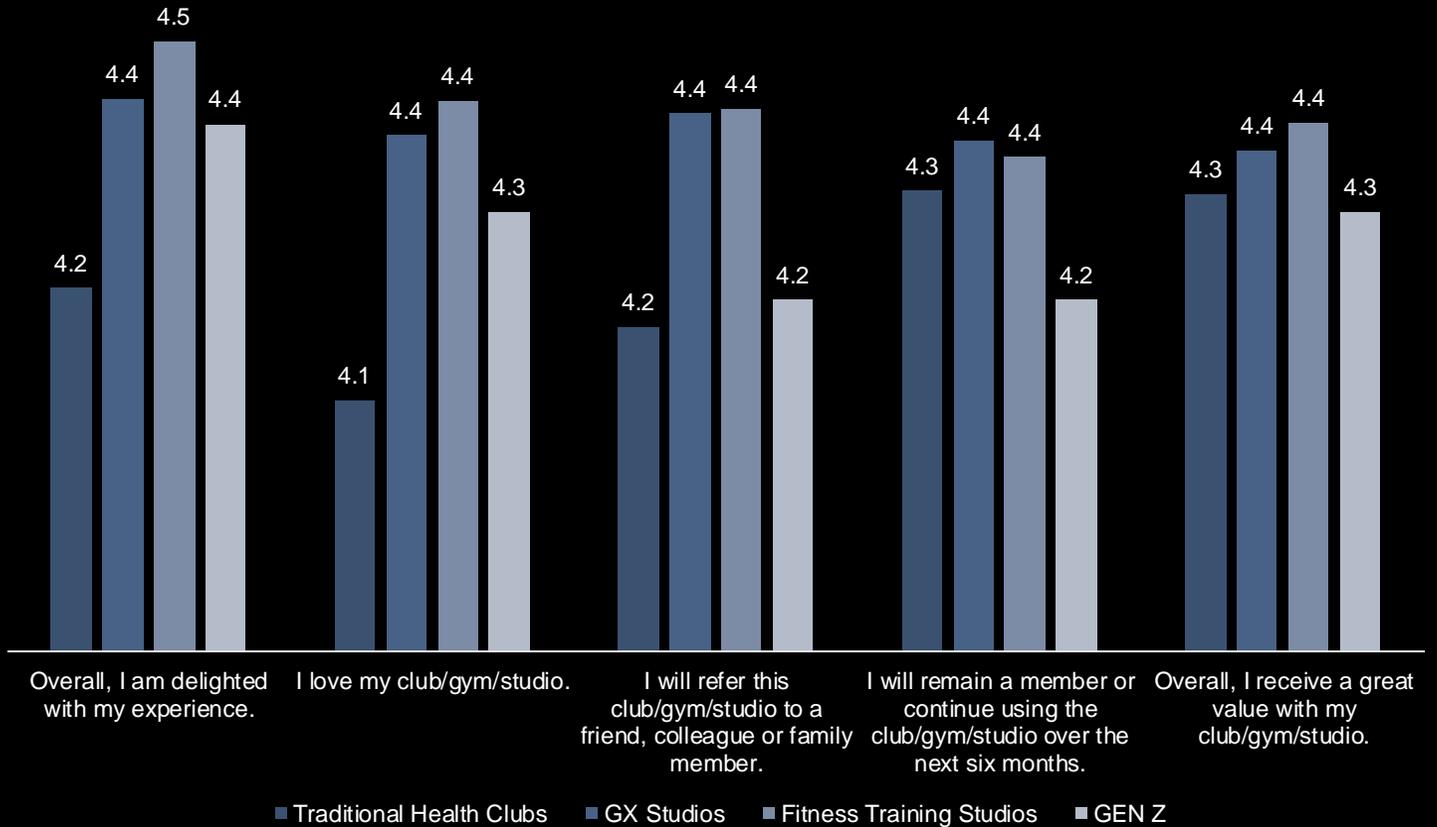
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# Retention

Most Gen Z health club/studio members and users are having good experiences where they work out. One caution to consider, however: their intent to remain a member or continue using their club over the next six months is directionally lower than what is typical. Retention initiatives that create value will be an opportunity for operators to affect the tenure of Gen Z.

## THE GEN Z FITNESS CONSUMER MEMBER EXPERIENCE

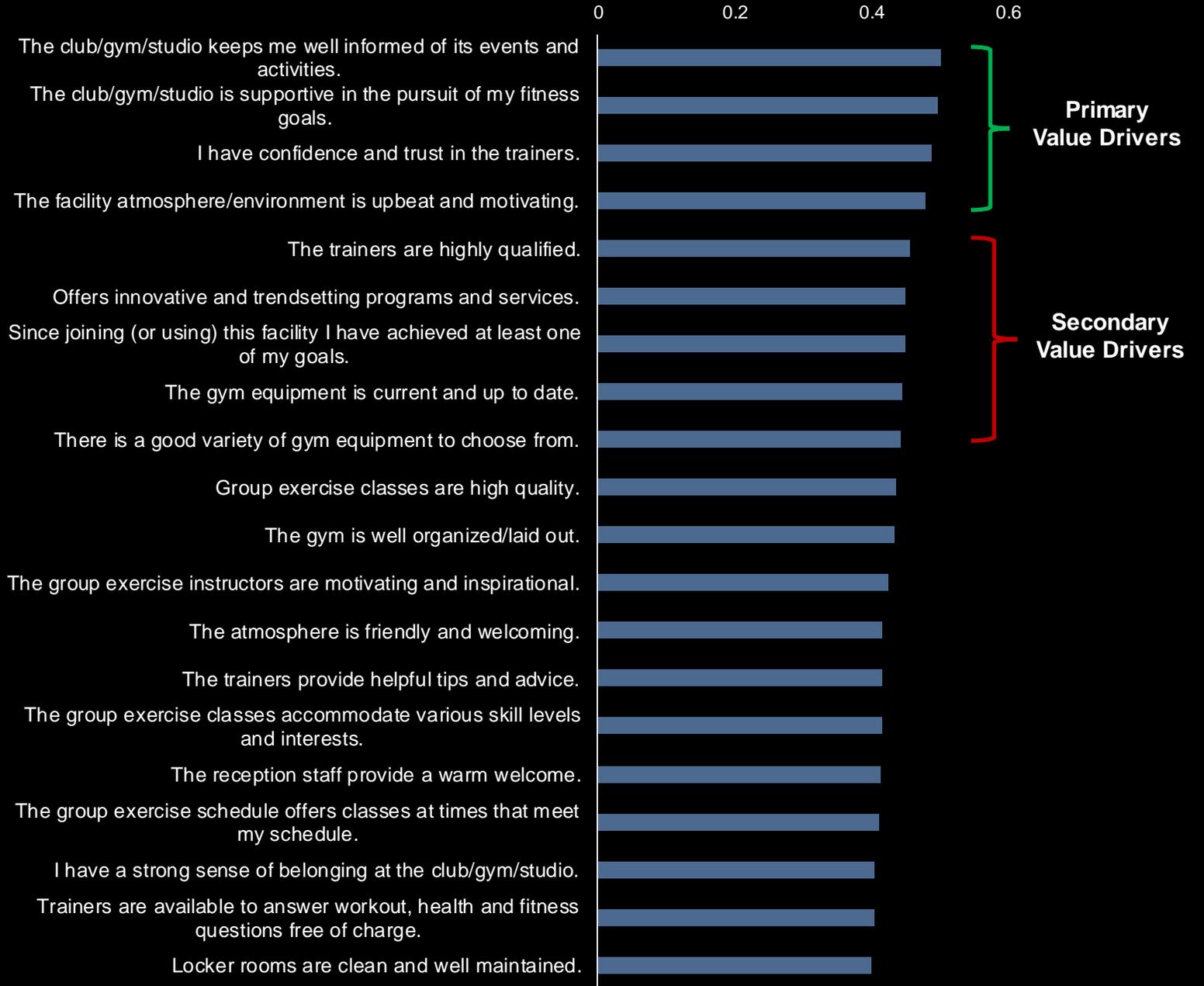


# THE GEN Z FITNESS CONSUMER TOP 20 VALUE DRIVERS

## Communicate and support

Creating value for the Gen Z fitness consumer is primarily driven by keeping them well informed, being supportive of their goals, having qualified trainers they trust, and providing a workout environment that is upbeat and motivating.

In addition, Gen Z are looking for innovative programs and services, a variety of current equipment, quality group exercise classes and achieving fitness goals.



# Gen Z's Response to Economic Headwinds

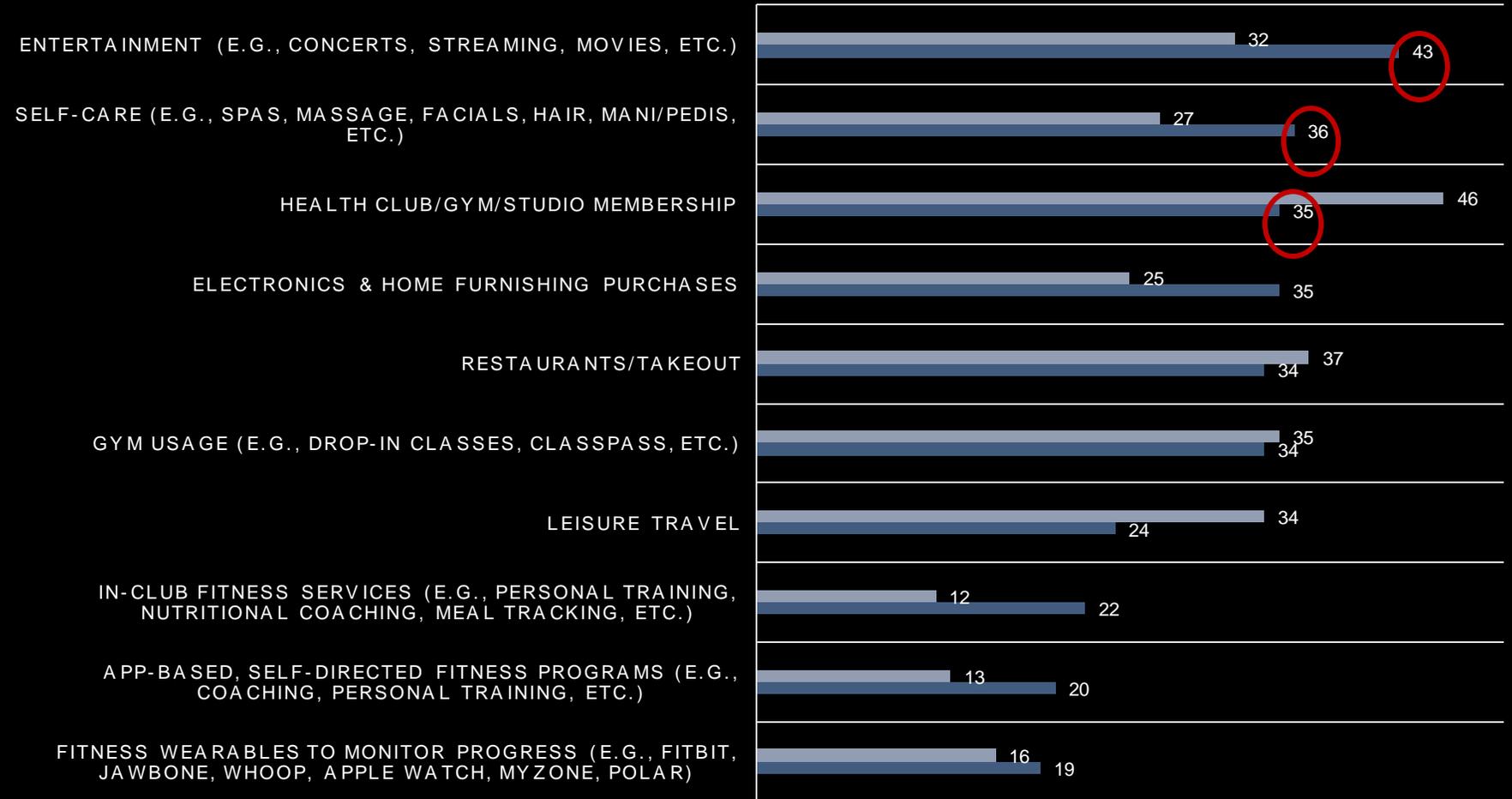
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The **Price Sensitivity Meter (PSM)** is a market technique for determining consumer price preferences. It was introduced in 1976 by Dutch economist Peter van Westendorp. The traditional PSM approach asks four price-related questions, which are then evaluated as a series of four cumulative distributions, one distribution for each question.

# Gen Z love their entertainment

When asked what they would not give up if the economy were to worsen, the #1 response was entertainment at (43%), followed by Self-Care (36%), Health Club/Gym/Studio membership (35%), and Electronics/Home Furnishings (35%). Their priorities speak volumes to how operators will need to compete for their share of wallet and prove value in order to retain their loyalty.

## THE GEN Z FITNESS CONSUMER IF ECONOMIC SITUATION WORSENS, WHICH WOULD YOU ABSOLUTELY NOT GIVE UP?

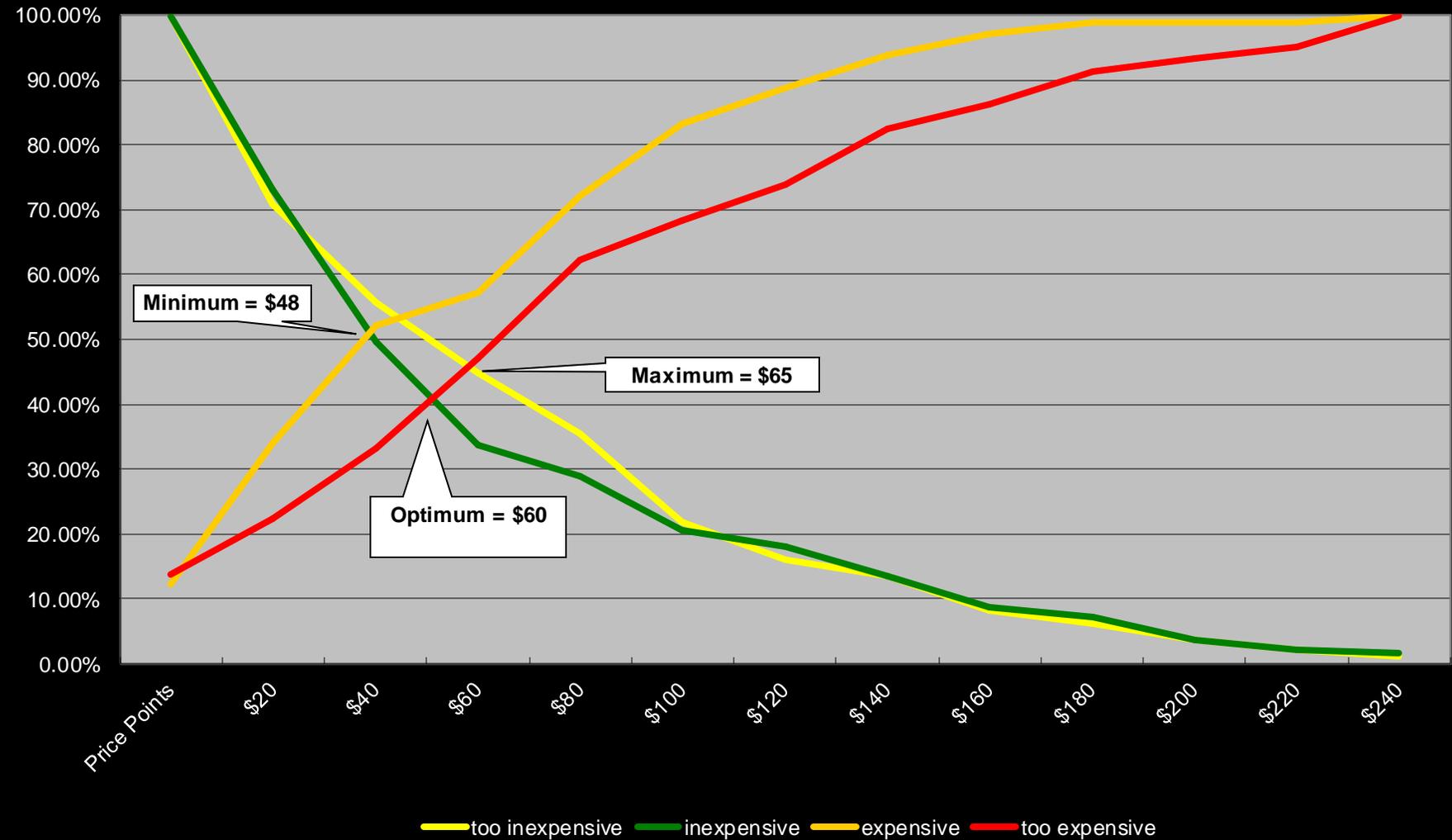


■ All Members/Users ■ GenZ

# Gen Z are willing to spend slightly more than the average on Health Club Dues

The optimum price point for ALL members falls between \$40-\$60. For Gen Z, there's a bit more elasticity with monthly dues. They are willing to spend between \$48 and \$65 a month.

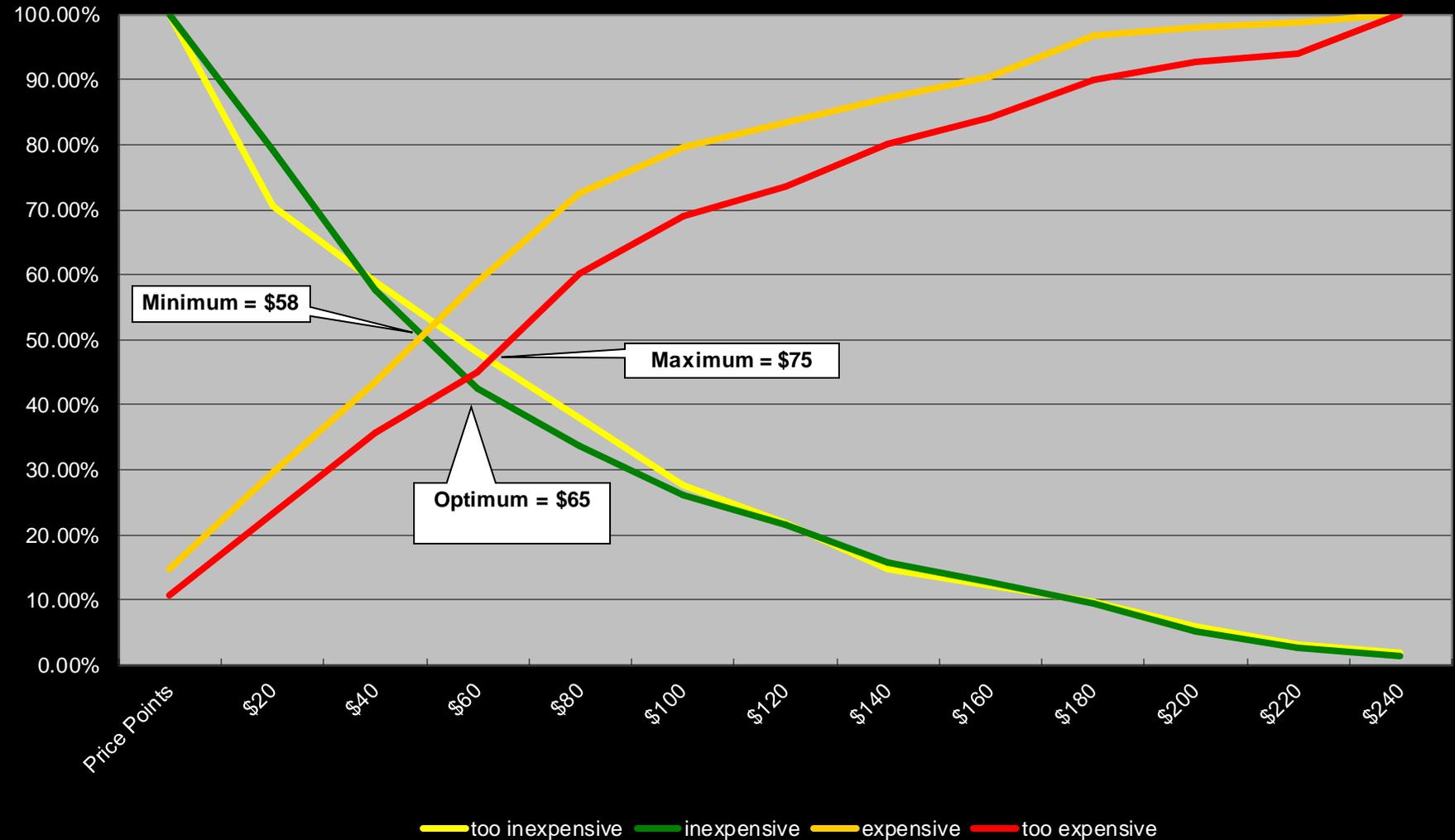
GEN Z FITNESS CONSUMER PRICE SENSIVITY METER  
HEALTH CLUB OR BIG-BOX GYM MONTHLY DUES



# Gen Z are willing to spend more than the average for Fitness Studio Dues

When asking the general fitness studio user what they are willing to spend on monthly dues, the optimum falls between \$45 and \$62. Gen Z, however, is willing to spend between \$58 and \$75 a month on classes at a fitness studio.

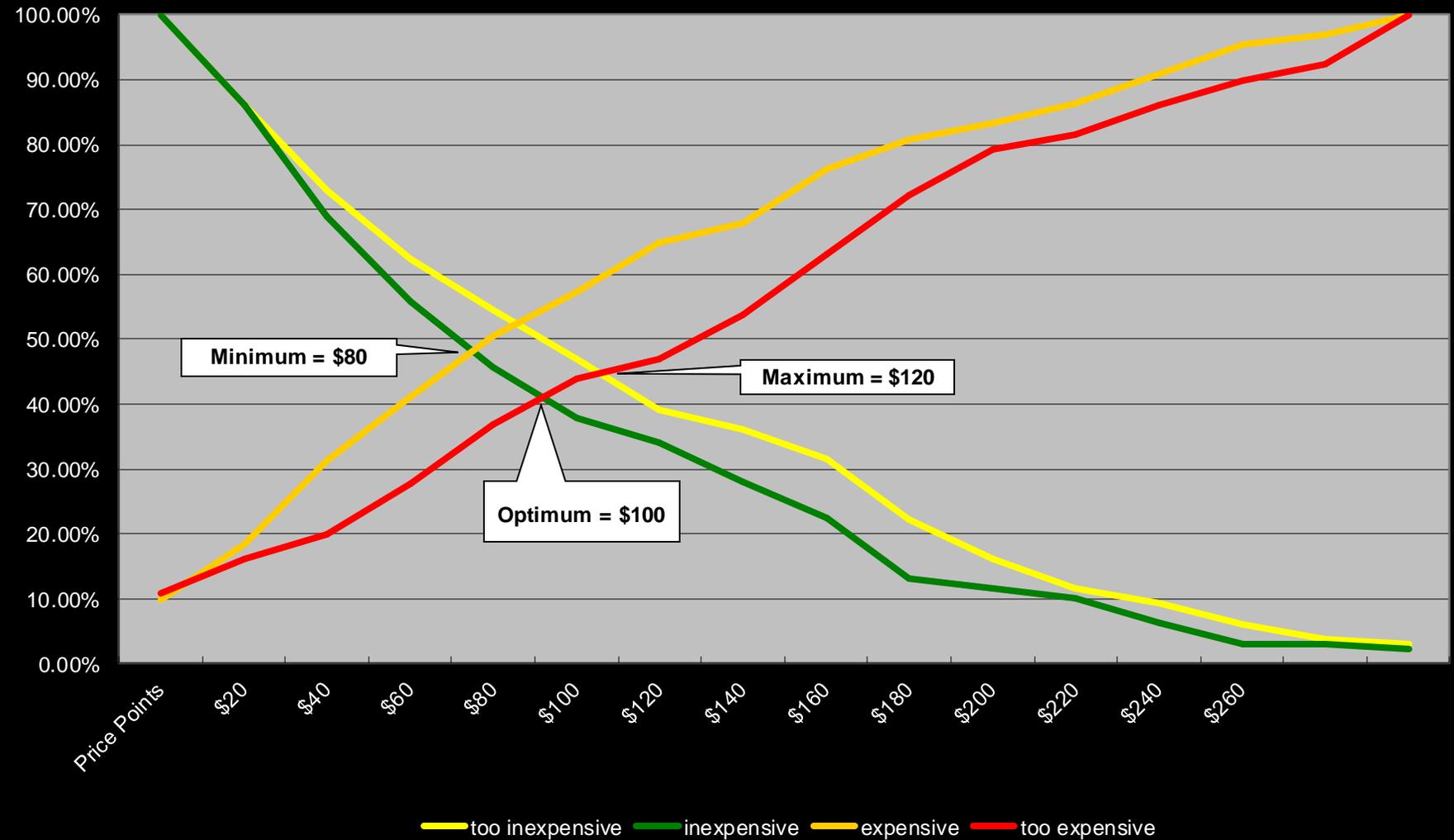
**GEN Z FITNESS CONSUMER PRICE SENSIVITY METER  
MONTHLY DUES FOR FITNESS STUDIOS THAT OFFERS CLASSES SUCH AS  
YOGA, SPIN, PILATES, BARRE, ETC.**



# Gen Z spend for ad-hoc services is slightly lower than average

While the average optimum spend for members is between \$95 and \$119, the range for Gen Z is broader with a lower minimum price point – between \$80 and \$120.

**GEN Z FITNESS CONSUMER PRICE SENSIVITY METER  
FEES FOR AD-HOC SERVICES SUCH AS PERSONAL TRAINING, RECOVERY THERAPIES,  
FEE-BASED GX  
(AMONG GEN Z WHO CURRENTLY PURCHASE SERVICES)**



# Biotech Wellness, Spiritual Wellbeing and Mental Health Programs are opportunities for innovation!

There appears to be a supply shortage for products and services that address biotech wellness therapies, spiritual well-being, and mental health.

## THE GEN Z FITNESS CONSUMER HOW WELL GYM/STUDIO OFFERS PRODUCTS/SERVICES

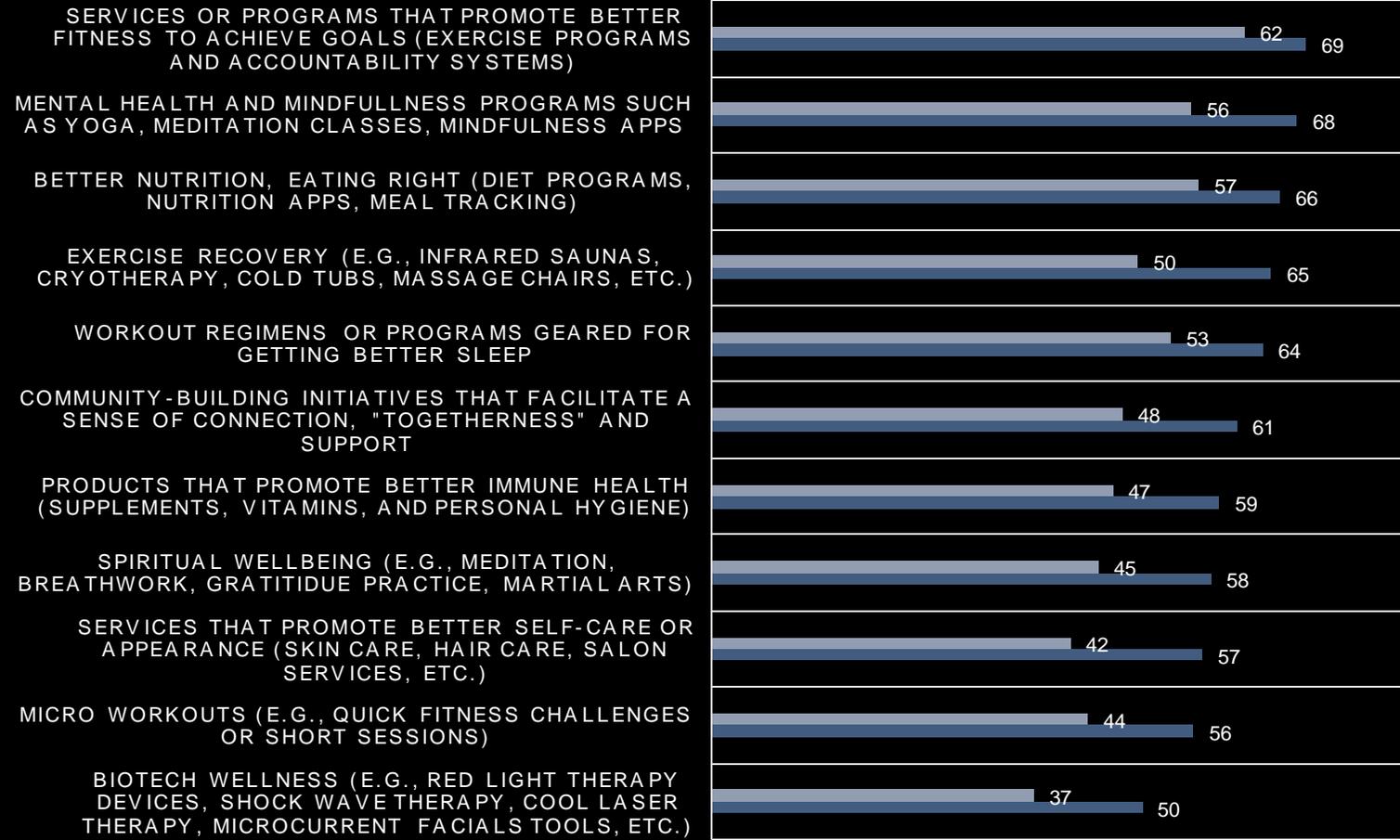


- There are NOT nearly enough programs or services available to achieve this
- There are some, but I wish there were more
- There are PLENTY of programs or services available to achieve this

# Products that help Gen Z achieve goals and improve mental health are top priorities

Priorities for products and services differ slightly from what is perceived as currently available in the market. Clearly, Gen Z is interested in products/services that promote hitting fitness goals, improving mental health and guiding better nutrition and eating habits.

## PRIORITY TO PLACE ON PROVIDING PRODUCTS/SERVICES (% OF VERY HIGH/HIGH PRIORITY)



■ All Members/Users ■ GenZ



# Marketing to Gen Z

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# Marketing to Gen Z

Gen Z spends 1-5 hours on social media per day

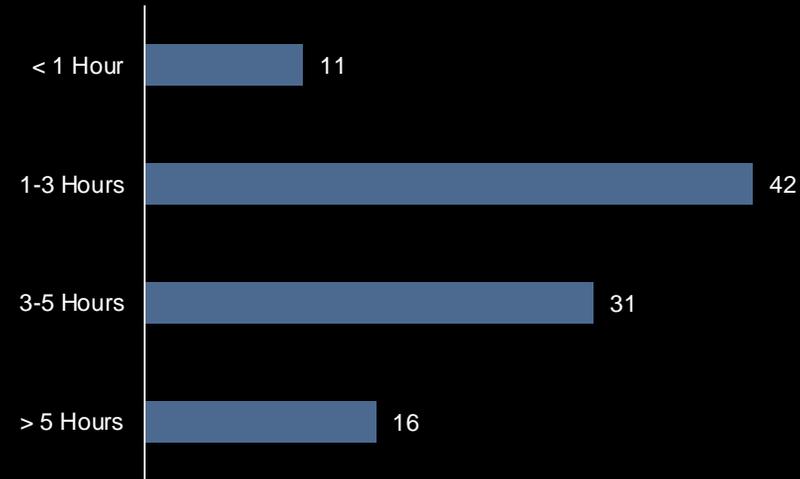
Primary Platforms Used:

- YouTube ads/content
- TikTok Videos
- Snapchat
- Instagram ads/Instagram influencer posts

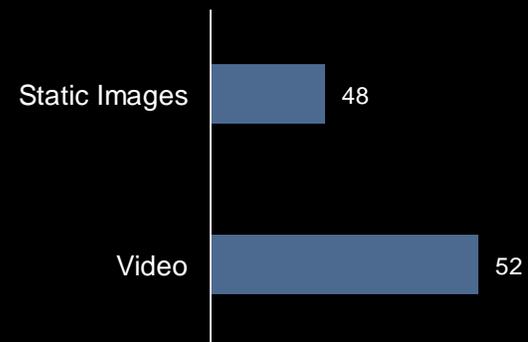
## What works

- User-generated content; think influencers
- Ads that are true to a brand's core values (build trust)
- Both static and video advertising channels
- TV and Print remain strong ad choices
- Transparency is important to build trust

**GEN Z**  
Average Time Per Day Spent on Social Media



**GEN Z**  
Ad Preferences on Social Media

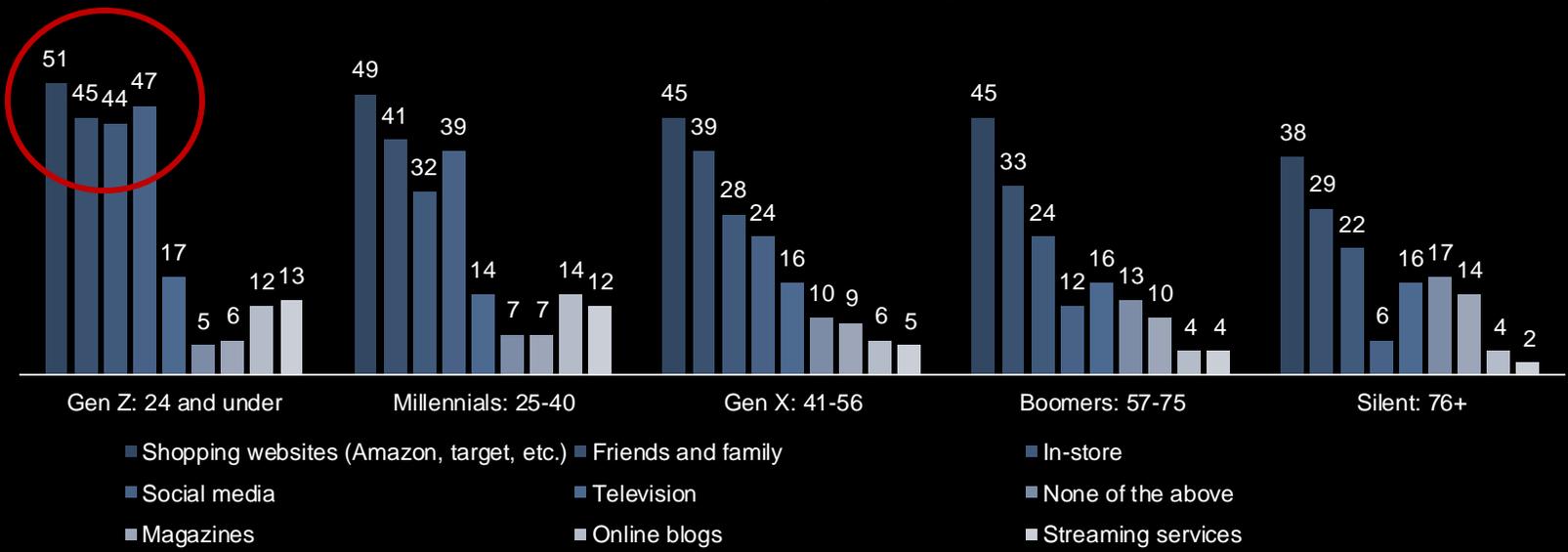


Source: Creatopy

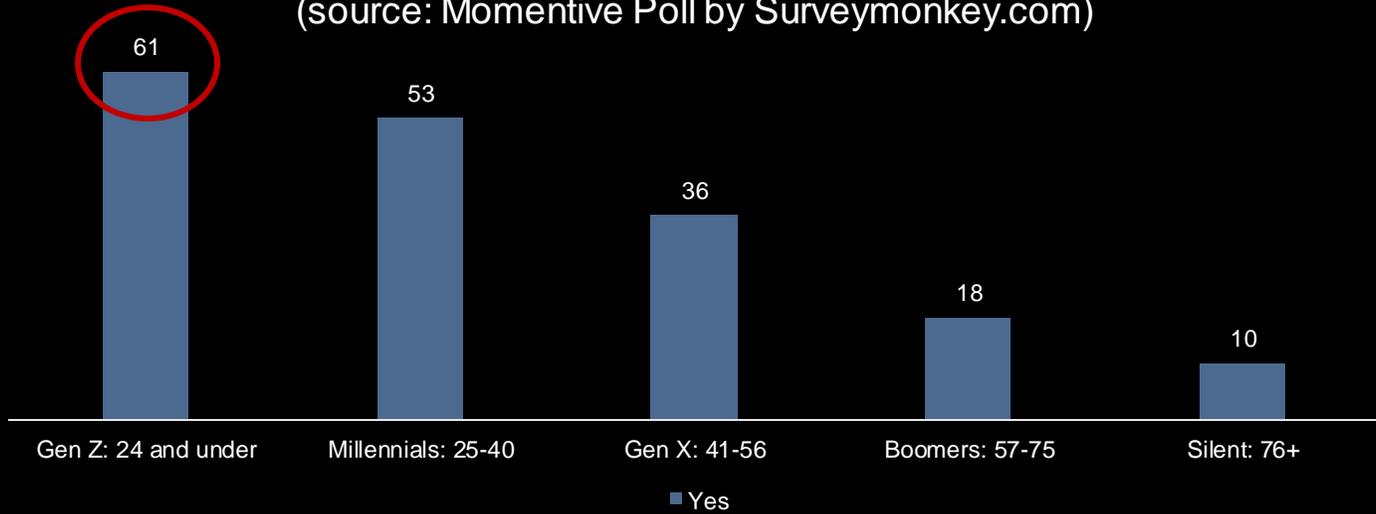
# Social media platforms play a growing role in the customer journey, especially for Gen Z

Gen Zers find inspiration for their purchases from a diverse array of sources and if they like your brand, Gen Zers will likely follow it on social media.

## SOURCES OF INSPIRATION FOR PURCHASES (source: Momentive Poll by Surveymonkey.com)



## FOLLOW BRANDS THEY LIKE ON SOCIAL MEDIA (source: Momentive Poll by Surveymonkey.com)

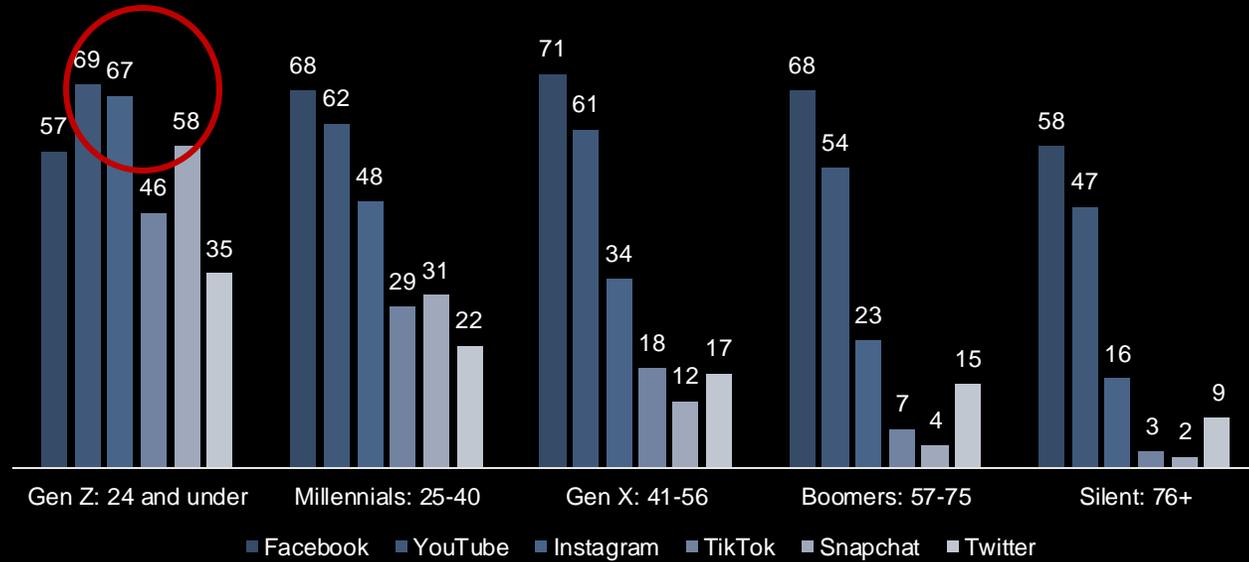


# YouTube, Instagram, Snapchat and TikTok most popular social media platforms among Gen Z

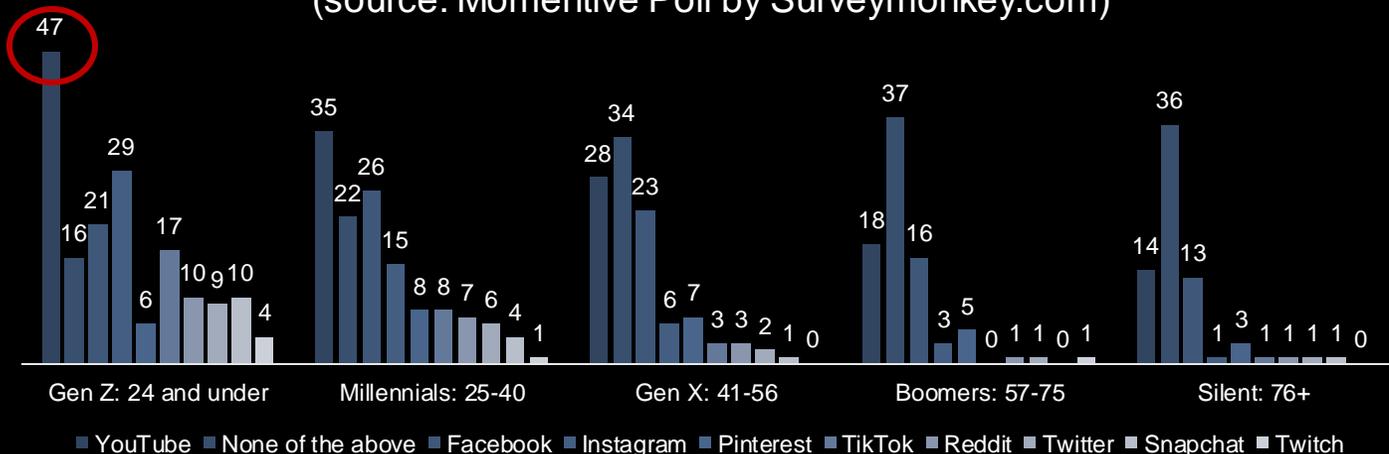
The leading platform used by Gen Z is YouTube (69%) followed by Instagram (67%). Nearly half of Gen Z are on TikTok (46%), and more than half on Snapchat (58%), compared with just 20% of all consumers on both platforms.

Almost half (47%) of Gen Zers use YouTube to research products before buying. Instagram (29%) and Facebook (21%) are much less frequented.

**SOCIAL MEDIA PLATFORM USED WITHIN LAST MONTH**  
(source: Momentive Poll by SurveyMonkey.com)



**SOCIAL MEDIA PLATFORMS USED TO RESEARCH PRODUCTS BEFORE MAKING A PURCHASE**  
(source: Momentive Poll by SurveyMonkey.com)



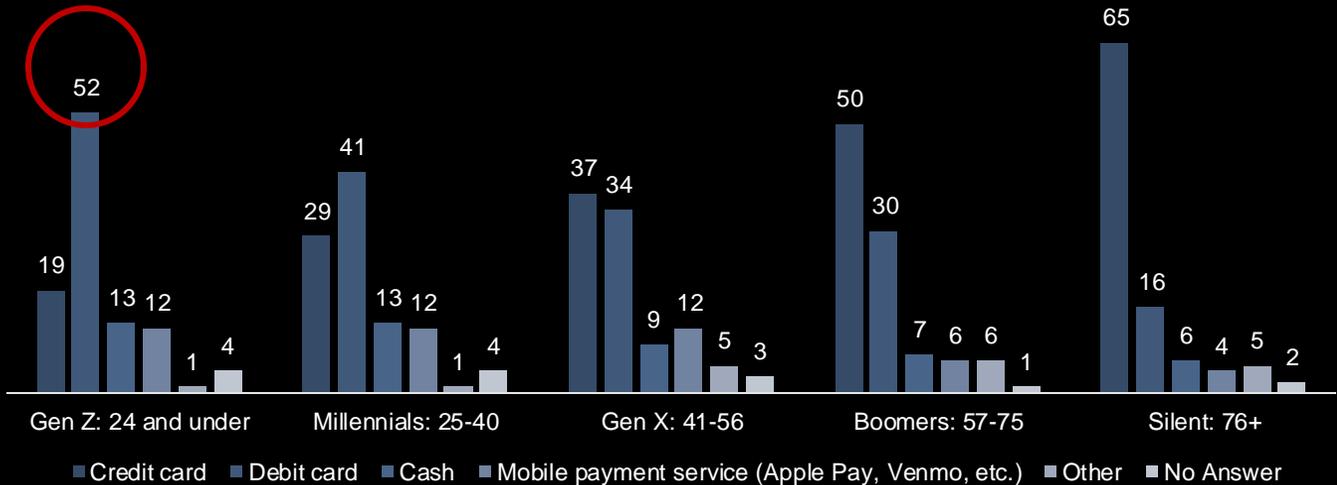
# Debit most preferred method of payment among Gen Z, but mobile payment services also popular

More than half (52%) of Gen Z consumers prefer using a debit card when making purchases; only one in five (19%) favor using credit cards.

More recent services see higher levels of usage among Gen Z, with one in three having used Venmo (33%), Apple Pay (31%), and Cash App (33%) for purchases last year, similar to the usage of Paypal (30%) for the demographic.

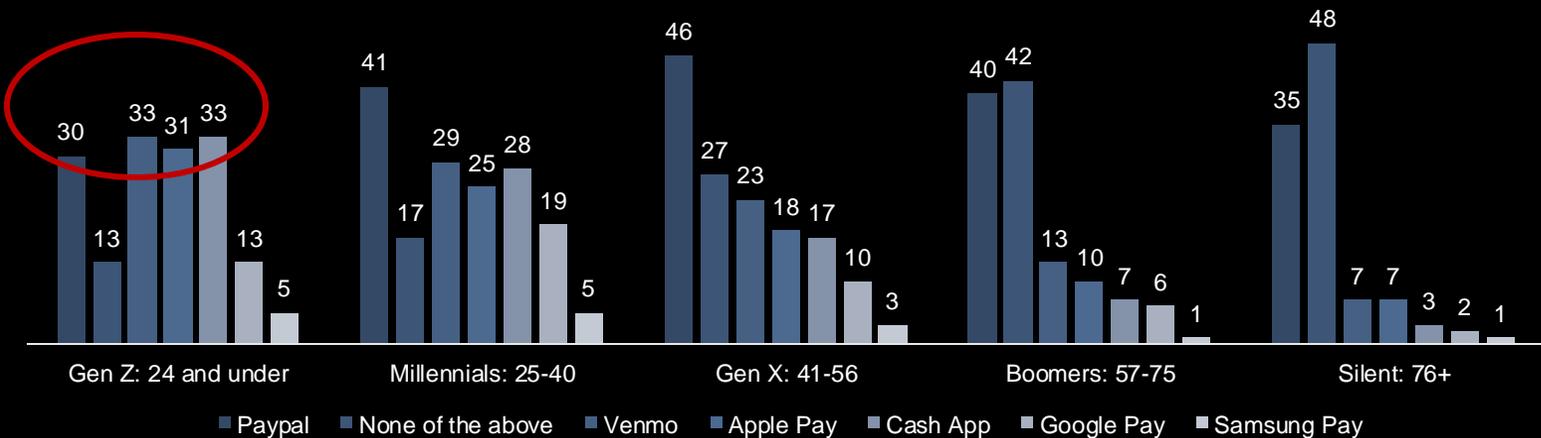
## PREFERRED METHOD OF PAYMENT WHEN MAKING A PURCHASE VIA SOCIAL MEDIA

(source: Momentive Poll by Surveymonkey.com)



## MOBILE PAYMENT SERVICES USED TO MAKE PURCHASES IN LAST YEAR

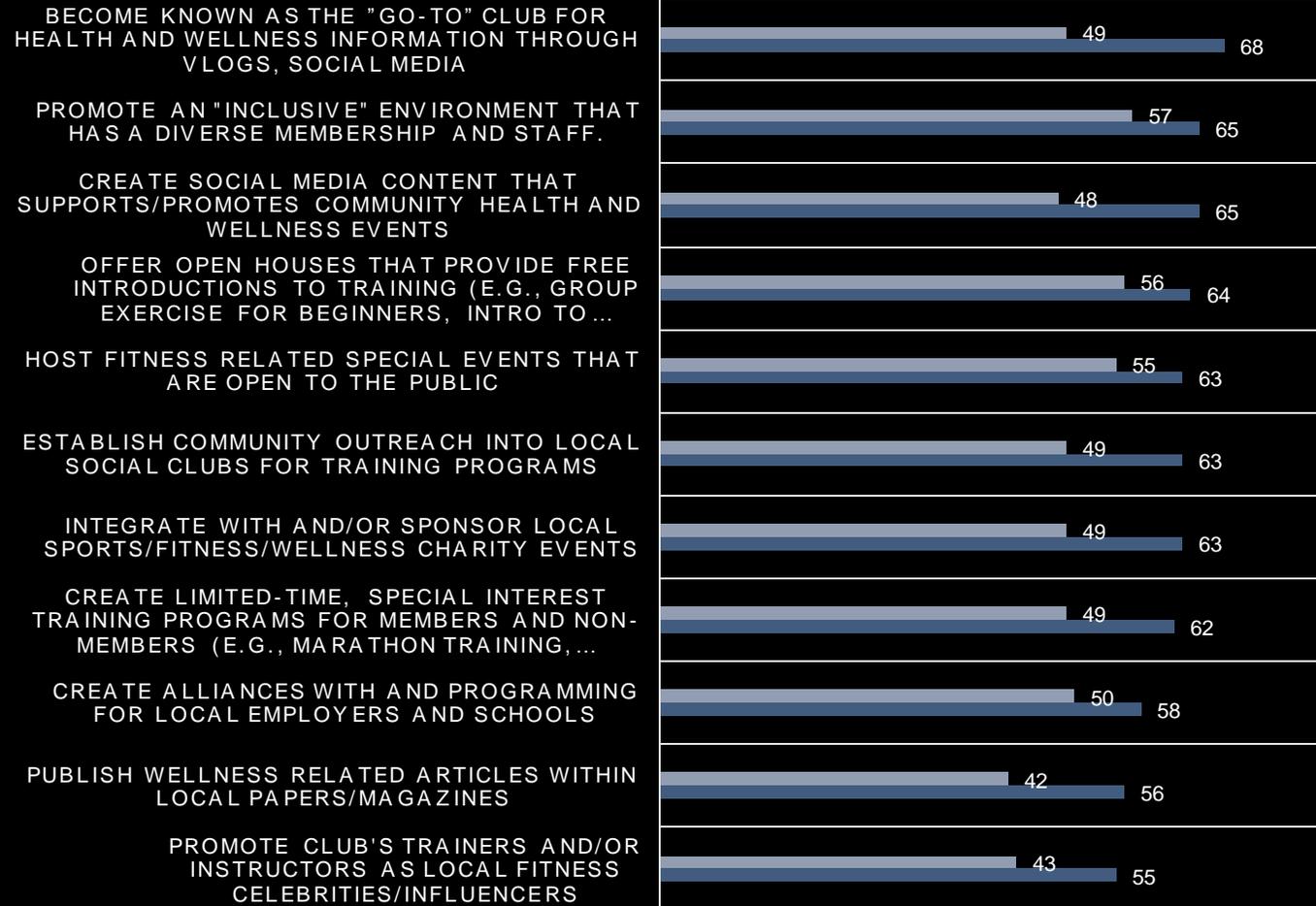
(source: Momentive Poll by Surveymonkey.com)



# Be the information influencer on social media

To create “community” for Gen Z, start by having a presence on social media that establishes the club as the “go-to” source for health and wellness information. Also, ensure the club environment promotes inclusivity and has a diverse membership/staff that mirrors the diversity of this multicultural generation.

## CREATING A STRONG SENSE OF COMMUNITY (% OF VERY HIGH/HIGH IMPACT)



■ All Members/Users ■ GenZ



ABC Fitness (ABC) is the market-leading software and services provider for fitness businesses globally. Building upon a legacy of excellence, ABC enables fitness operators of all sizes, anywhere in the world, to transform their vision of fitness into reality. Whether a boutique studio, international franchise, regional club chain, local gym, or personal trainer, ABC provides the industry insights, technology, and innovation to partner for growth long term. Founded in 1981, ABC helps over 35 million members around the world and processes over \$8.8B+ in payments annually for 24,000 clubs in over 92 countries.

Email: [info@abcfitness.com](mailto:info@abcfitness.com)

Website: <https://abcfitness.com>

Phone: 866-364-4596

# About ClubIntel



At ClubIntel, we deploy traditional marketing research methods to uncover not only what your clients and members want, but also to understand why they want it. In unlocking your clients' motivations, we can provide the uncommon insights that drive differentiated marketing communications, sales processes, and operational programming. The most successful, most profitable clubs understand their customer and turn that knowledge into a personal connection. Our data makes that happen.

**Email:**

**[Mark.Williamson@clubintelusa.com](mailto:Mark.Williamson@clubintelusa.com)**

**Website: <https://www.clubintelusa.com>**

**Phone: 214-232-2389**