

 **FITNESS** | WELLNESS WATCH Q1 2024

Quarterly fitness industry insights



Q1 2024 Wellness Watch snapshot

The ABC Fitness Wellness Watch Q1 report for 2024 provides insights into the performance of the fitness business industry, pulling from consumer utilization insights across our platforms which serve traditional gyms and health clubs, boutique fitness and franchise businesses, and personal training and coaching businesses globally. The report also incorporates findings from our exclusive third-party US consumer research. Combining data from our platforms ABC Ignite, ABC Glofox, ABC Evo, and ABC Trainerize offers a comprehensive look at fitness trends from every angle of the industry.

Our quarterly Wellness Watch report is your go-to guide for capitalizing on the trends in the fitness industry as illustrated by our collective community of 40M members, 30K+ studios and gyms, and 570K+ personal trainers and coaches worldwide.

Here are our top findings this quarter:

- Check-in data is strong year-over-year, nearly doubling behavior of pre-pandemic members. **Traditional gyms saw a 60% increase¹ and studios and boutiques saw a 22% increase.²**
- **Net new joins are also up 11% in studios and boutiques²**, while they remain flat in traditional gyms.¹
- Personal training continues to increase, with **38% of Gen Z and 29% of the total population opting to use a trainer or coach.³**
- With member behavior on the rise, **fitness businesses are becoming the new "third place"** for active consumers.

"People around the world are recognizing the importance of fitness for their physical and mental wellbeing, and now we are seeing people recognize the social benefit as well.

The fitness industry is poised to help more people in more ways than ever before as fitness businesses emerge as a strong driver of community."



Bill Davis, ABC Fitness CEO

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¹Source: ABC Fitness ABC Fitness proprietary data, Global, Q1 2024.

²Source: ABC Fitness ABC Glofox proprietary data, Global, Q1 2024.

³Source: ABC Fitness active consumer research, United States, January 2024.

A wellness-first mindset





Fitness businesses are seeing significant growth in check-ins and utilization

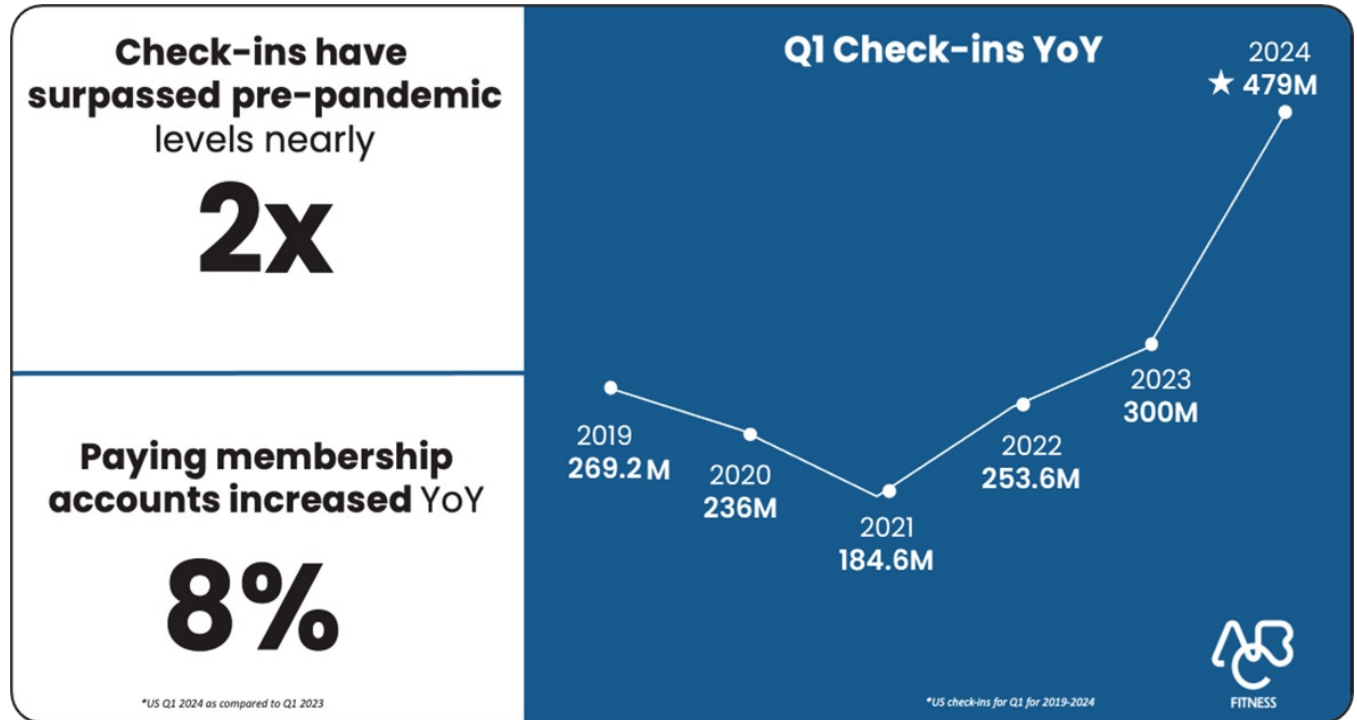
Wellness Watch findings:

- Q1 has seen incredible YoY growth with a **51% increase in check-ins globally**^{1,2} in traditional gyms and boutique studios.
- **Traditional gyms saw a 60% increase**¹ and studios and boutiques saw a 22% increase² in utilization from their current members.
- The fitness industry has more than rebounded – **Q1 saw a ~2x increase since pre-covid check-ins.**¹

“Fitness enthusiasts and gym goers have a high ‘Wellness IQ’ and are prioritizing physical health because they understand the mental and physical health benefits. Retention of current members is a key growth area for fitness businesses in 2024.”



– Cristine Kao, ABC Fitness CMO



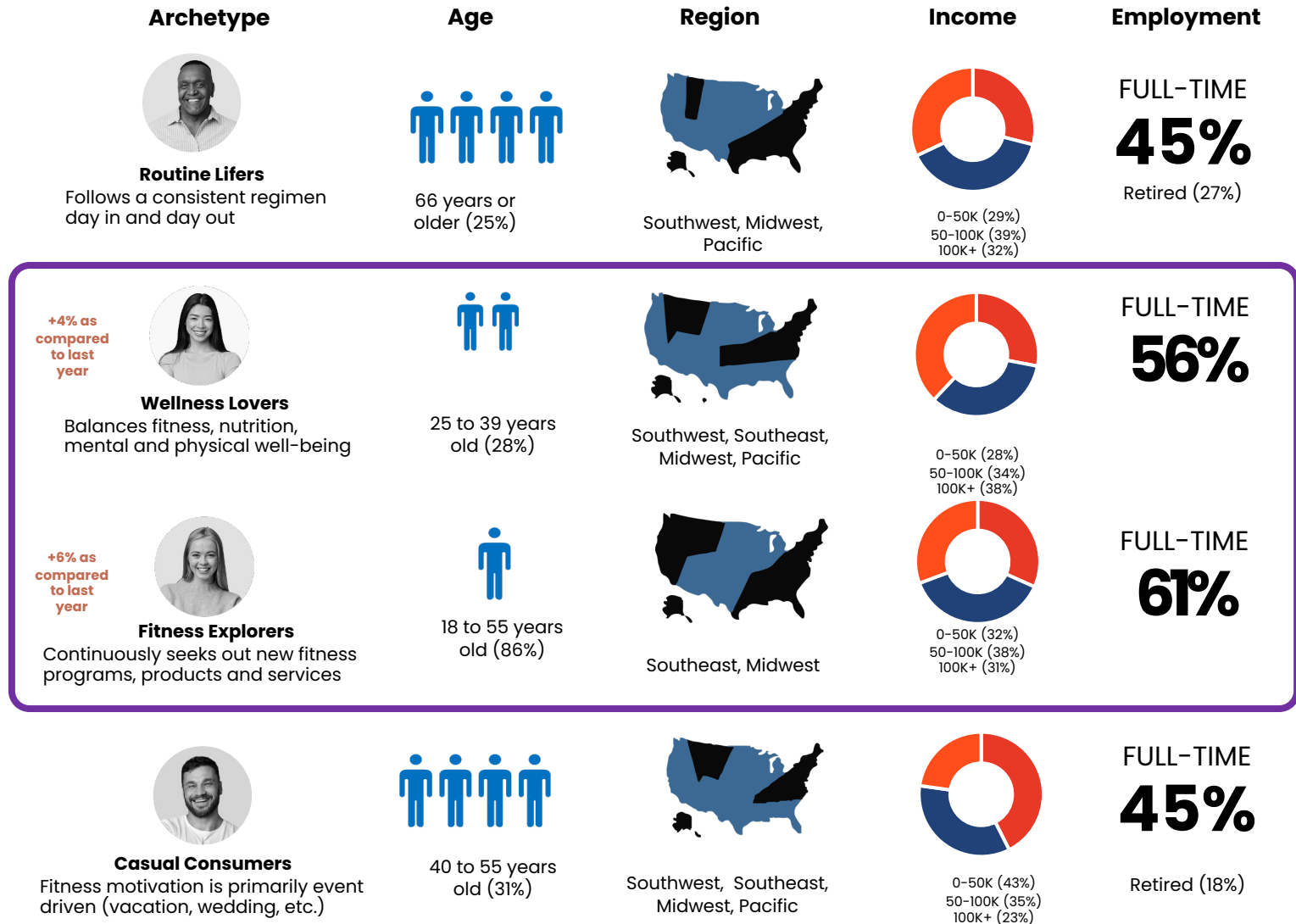
¹Source: ABC Fitness ABC Ignite proprietary data, North America, Q1 2024.

²Source: ABC Fitness ABC Glofox proprietary data, Global, Q1 2024.

Member mindset is shifting from exercise-first to wellness-first

Wellness Watch findings:

- This year, we saw **more people identify as Wellness Lovers and Fitness Explorers**; a 4% and 6% increase as compared to last year, respectively.¹
- Interestingly, **Wellness Lovers are Millennials and older Gen Zs.**¹
- In comparison to other generations, these two groups prioritize their "total wellness" and will **seek modalities that support their needs beyond physical.**¹



¹ Source: TABC Fitness active consumer research, United States, January 2024.

The new “third place”

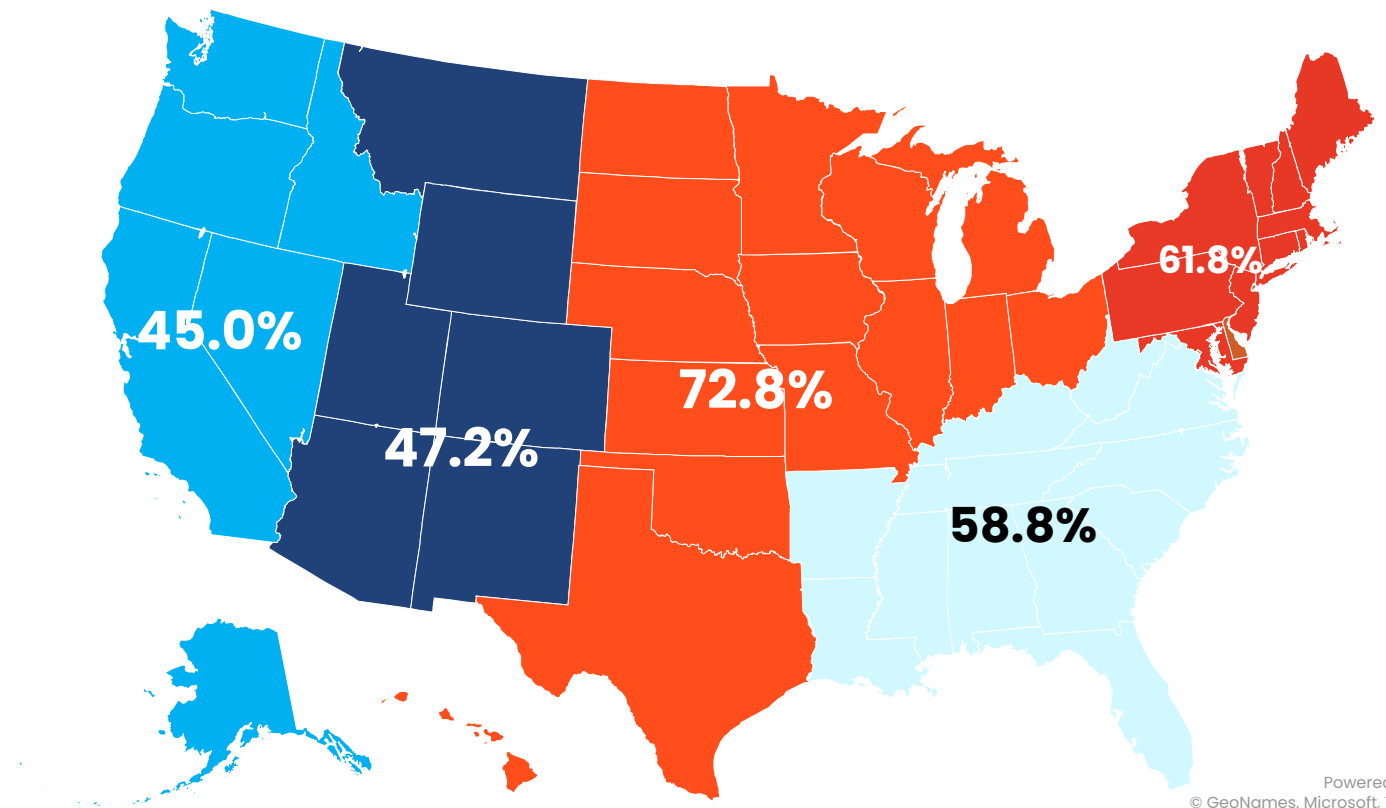


Gyms and studios are quickly becoming the new “third place”

Wellness Watch findings:

- The US saw the highest increase in check-ins, totaling **184M total visits** – that is the equivalent of nearly half of the US population. Some states saw over 100% increase in check-ins.¹
- People are craving community and are expecting their fitness gym or studio to foster connection and care about social values – **58% of members and users find it important for their fitness club to embrace social causes.**²
- In terms of New Join demographics, **men and women are nearly equal.**¹
- As American’s seek out community, connecting over physical fitness and wellness is becoming increasingly popular. **Gyms are emerging as a popular “third place;”** the community that active consumers crave outside of school/work and home.

Q1 2024 - Q1 2023 Membership Check-In Variance by Region



¹Source: ABC Fitness ABC Ignite proprietary data, North America, Q1 2024. 7

³Source: ABC Fitness active consumer research, United States, January 2024.

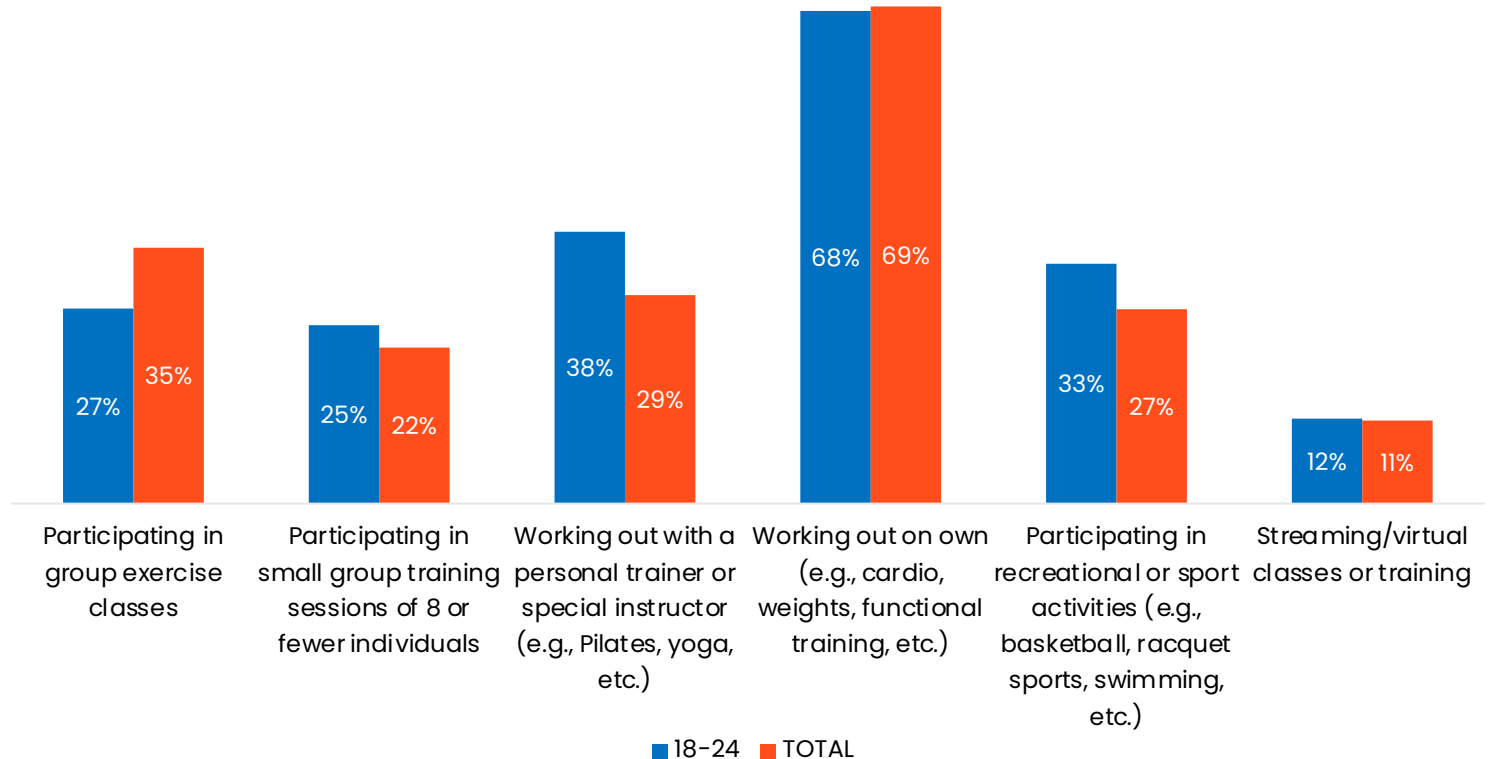


Gen Z and the future of fitness

Wellness Watch findings:

- Gen Z is invested in their physical and mental health – **more so than any other generation.**²
- Although **38% of Gen Zs use traditional health clubs**, they index highly with community rec centers, YMCAs, and fitness training studios. When compared to the total population, they index higher in personal trainer usage, recreational sports and small group training.²
- The sweet spot for their monthly dues falls **between \$21 and \$69.**²
- **29% of new joiners are Gen Z**, and Gen Z saw the highest increase of new joins YoY.¹
- Most **Gen Zs monitor their workouts with wearables** either their personal wearable (56%) or a monitor provided during GX classes (27%).²

2024 active consumers type of workout regimen



¹Source: ABC Fitness ABC Ignite proprietary data, North America, Q1 2024.

²Source: ABC Fitness ABC Glofox proprietary data, Global, Q1 2024.

Personal training investment is on the rise

Wellness Watch findings:

- With a total client breakdown of 3.6M men and 3.5M women, **women continue to grow in personal trainer usage.**¹
- YoY, ABC Trainerize grew by 78% users, with **women making up 50% of new users.**¹
- **Most Gen Zs (68%) work out on their own** which means gyms and coaches need to specifically target this demographic.²

“Gen Z is more digitally connected than almost any other generation. App-based workouts, gamified challenges, personalized data are all going to help connect to this audience.”

- Kai Karttunen, Fitness Coach



7.6M

habits tracked



1.2M

new clients



17.8M

workouts tracked



44.5M

meals tracked

¹Source: ABC Fitness ABC Trainerize proprietary data., Global, Q1 2024.

² Source: ABC Fitness active consumer research, United States, January 2024.

Change up your regimen



How can fitness businesses keep up?

- 1 Demonstrate how your fitness **business is purpose-led**. Show members how you care for your employees' mental health and what causes you support.
- 2 Personalize your offerings and marketing. **Segment your members** and target them with rewards, experiences, and insights that are unique to them.
- 3 **Digitally connect with members**, whether through training programs or synchronizing with wearables.
- 4 Focusing on retention is key in 2024 – with **current members indexing higher in check-ins** than new joins.
- 5 Monitor churn and **leverage data** to assess and correct frozen and cancelled accounts.
- 6 Foster connection. With **gyms and fitness studios becoming a natural "third place,"** consider how to expand that through socials, challenges, and community building.

"Utilization is up globally nearly 90% when compared to pre-pandemic levels.

Now, we are seeing the focus shift to overall well-being. The studio, gym or personal trainer is the gateway to more holistic health opportunities for members. Fitness businesses should recognize the increased demand for their services and the heightened importance of healthy living in the average consumers' life."



Bill Davis, ABC Fitness CEO

Transform your fitness visions into seamless reality today

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- ✓ Grow your fitness business 30% by automating sales, member engagement, and operations.
- ✓ Join a community of 600K+ fitness businesses across 40M members worldwide.
- ✓ Is your business ready to take it to the next level? 40% of US fitness business trust ABC Fitness to help them.

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