

# Intrinsic and Extrinsic Motivations of The Next Fitness Consumer

Part III of III

Insights and strategies for  
motivating the consumer's return  
to health clubs and gyms.

Prepared by **club intel**  
Insight Inspiration Impact

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# Acknowledgements

## ABC Fitness Solutions



FITNESS  
SOLUTIONS

I continue to be amazed by the partnership and coming together of the entire fitness community. We have seen tremendous innovation from clubs as they rethink their strategy in response to a shift in members' expectations. This, paired with the positive new member join trends we are seeing in the ABC Fitness Solutions portfolio has us incredibly optimistic about what is to come for our industry.

While there are positive indicators for us and the fitness industry at large, there remain unanswered questions regarding the shift in consumer motivation for fitness:

- *How have consumers' fitness routines changed since the pandemic?*
- *Are consumers meeting their health and fitness goals?*
- *What motivates consumers to work out?*
- *What will motivate them to return to a normal fitness routine that will involve returning to a club?*
- *Where are they working out and where are they spending money on health and fitness?*

These unanswered questions were the motivation behind what we are delivering to you today. In partnership with ClubIntel and the IHRSA Foundation, we worked together to curate questions that would provide the answers to our industry's most pressing questions and re-enforcement of our collective need to innovate for what is next.

We are pleased to bring you "The Next Fitness Consumer Report" where inside you will find the trends and data points that we hope will help ignite creativity and redefine innovation for the future of fitness.

All the best,

Bill Davis  
President & CEO  
ABC Fitness Solutions

# Welcome IHRSA Foundation



Alongside ABC Fitness Solutions and ClubIntel, the IHRSA Foundation is pleased to present “*The Next Fitness Consumer.*” This report examines the exercise motivations and preferences of fitness consumers post-pandemic and beyond.

As you will soon read, fitness is top of mind among Americans as nearly two-thirds report exercising regularly. The benefits of regular exercise is the number one motivator for physical activity, while maintaining and improving mental wellness ranks second as the most popular fitness goal. Consumers get active using a variety of outlets. Exercising outdoors, in the gym, at home, and on the go with mobile apps all comprise the ecosystem of the active consumer.

While this surge in demand for fitness is encouraging, opportunities remain for the industry to meet the physical activity needs of some consumers. Consistent exercise is a challenge for parents as adults with at least one child at home account for only 34% of active consumers. Also, only 44% of disabled persons indicate being active, but a separate 40% report interest in regular exercise.

We hope the following insights will help industry professionals and business operators better understand the next fitness consumer as well as potential consumers. May the report facilitate discussion and strategy around not only re-engaging members, but also serving new prospects seeking the health benefits of regular exercise.

The IHRSA Foundation

# Background and Objectives

## Background

With the COVID-19 pandemic creating significant disruption within the health and fitness club industry throughout most of 2020 and into 2021, government mandated health club/gym closures, restricted access, and consumer health safety fears have all combined to engender significant losses in member usage and membership resignations. As health clubs begin to reopen, a concerted effort to re-engage consumer usage will be paramount to the future success of the industry. IHRSA Foundation, and its sponsor ABC Fitness Solutions, wish to understand the underlying motivations of human behavior that will be barriers to and opportunities for building marketing and communications, and programming that will appeal to consumer's mindset to motivate trial, usage and membership matriculation.

## Study Objectives

- To profile pre-pandemic and current exercise behavior to include workout regimen, monthly expenditures, and effectiveness of workout.
- Measure market share of big-box gym members and their consumer's interactions.
- Prioritize elements within the fitness club experience that will encourage members to return post-pandemic.
- Define changes in active consumer's fitness regimen mix pre-pandemic and currently; measure importance of each as it's related to the consumer's overall workout routine.
- Measure both behavioral and cognitive (mental) influences that may impact/encourage exercise motivation in the gym/with a club.
  - *Behavioral will include factors that may be obstacles in the physical and/or social environments.*
  - *Cognitive (mental) will include factors that are influenced by beliefs and attitudes (goals, outcome expectations, outcome value, and/or self-efficacy (confidence)).*
- Profile consumers to determine unique differences that may exist between consumer segments (geographic, gender, generational).



# Methodology and Disclaimer

## **Methodology**

In June 2021, survey participants were recruited for this study using a series of screening questions to qualify a highly targeted profile of “active” consumers. This study reflects those who are ages 18 and older, and who are currently exercising, working out or staying active. The study also captured responses from consumers who stated they were not active but had an interest in doing so. If a consumer was not currently active and had no interest, they were disqualified from the study. The study captured 2,113 qualified consumer responses via an online survey within major U.S. markets and across all U.S. regions. The study was administered in collaboration with Dynata, an international research panel firm.

## **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 upon 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, The IHRSA Foundation 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, The IHRSA Foundation or ABC Fitness Solutions be liable for any consequential damages.

# The Active Consumer Profile



# The Active Consumer Profile

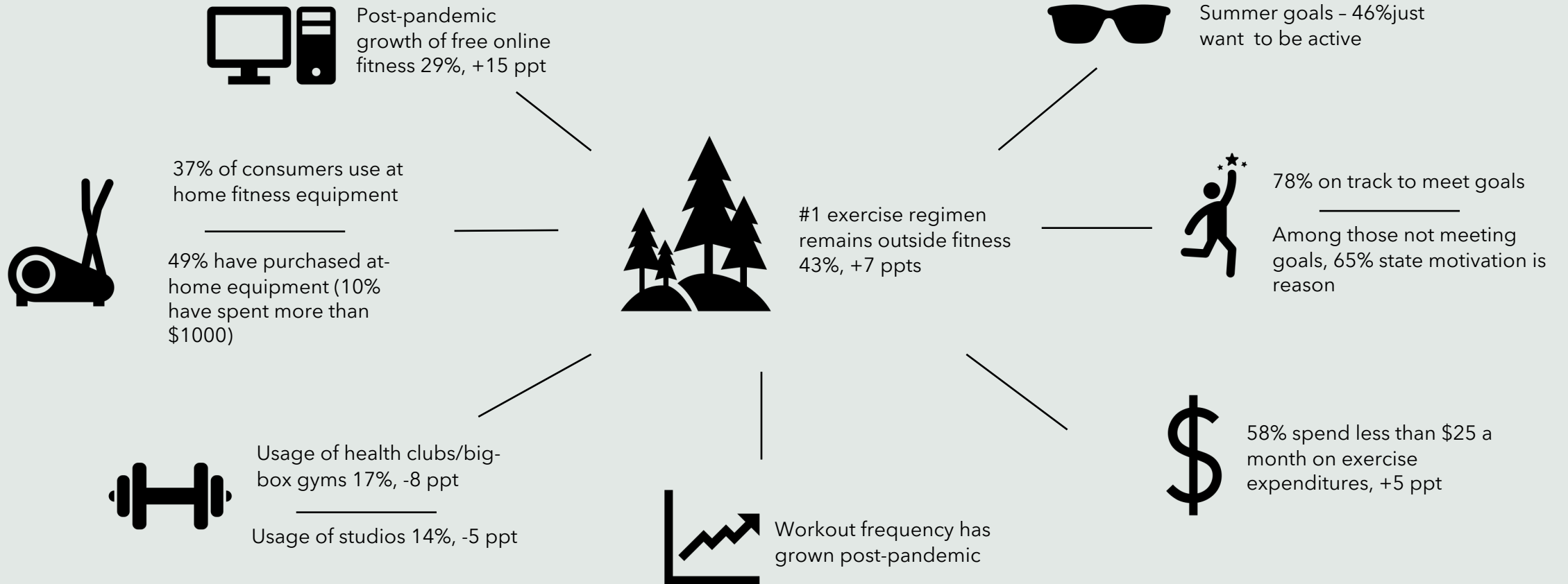




The Active  
Consumer  
“Fitness Mix”



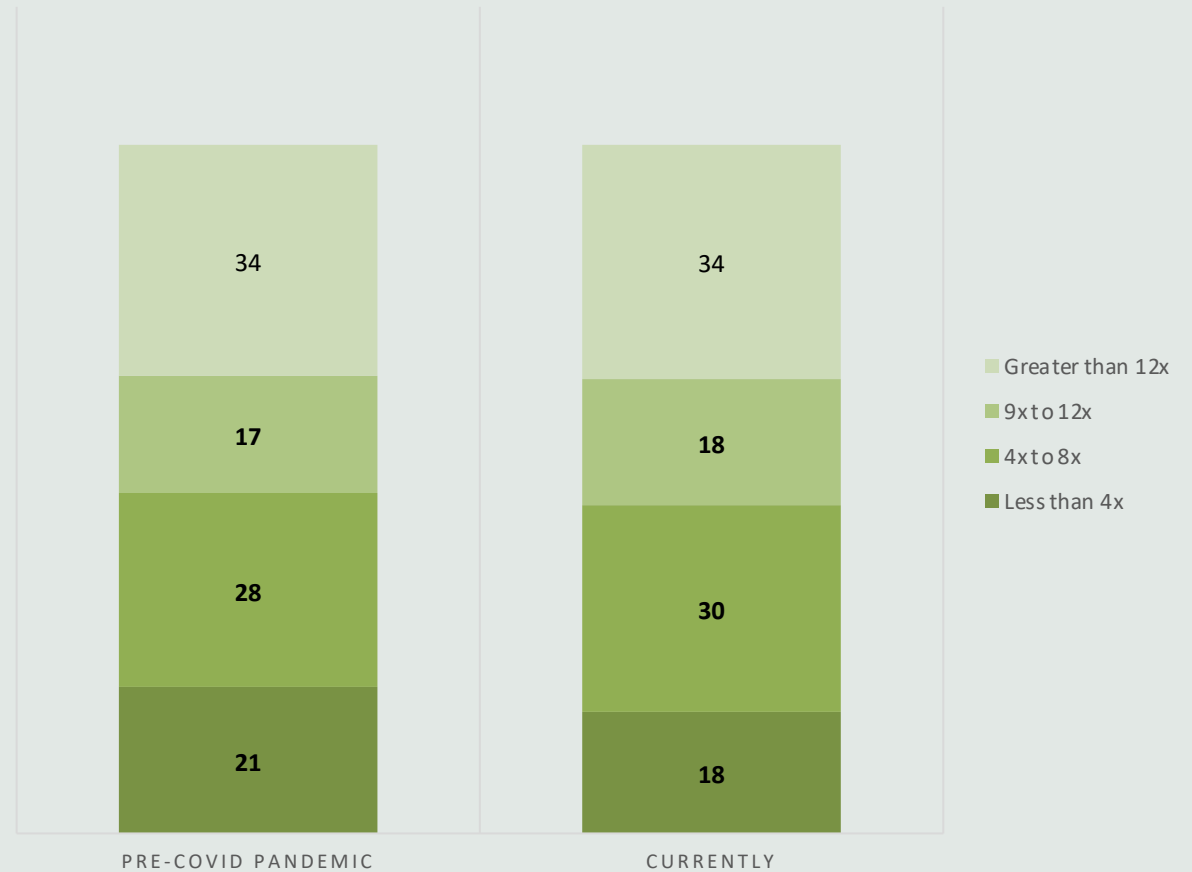
# The Active Consumer Fitness Mix



Active consumers remain diligent with their workout frequency.

Despite changes with where consumers workout (health clubs/gyms versus at home), they have maintained, or in some instances, increased their workout frequency.

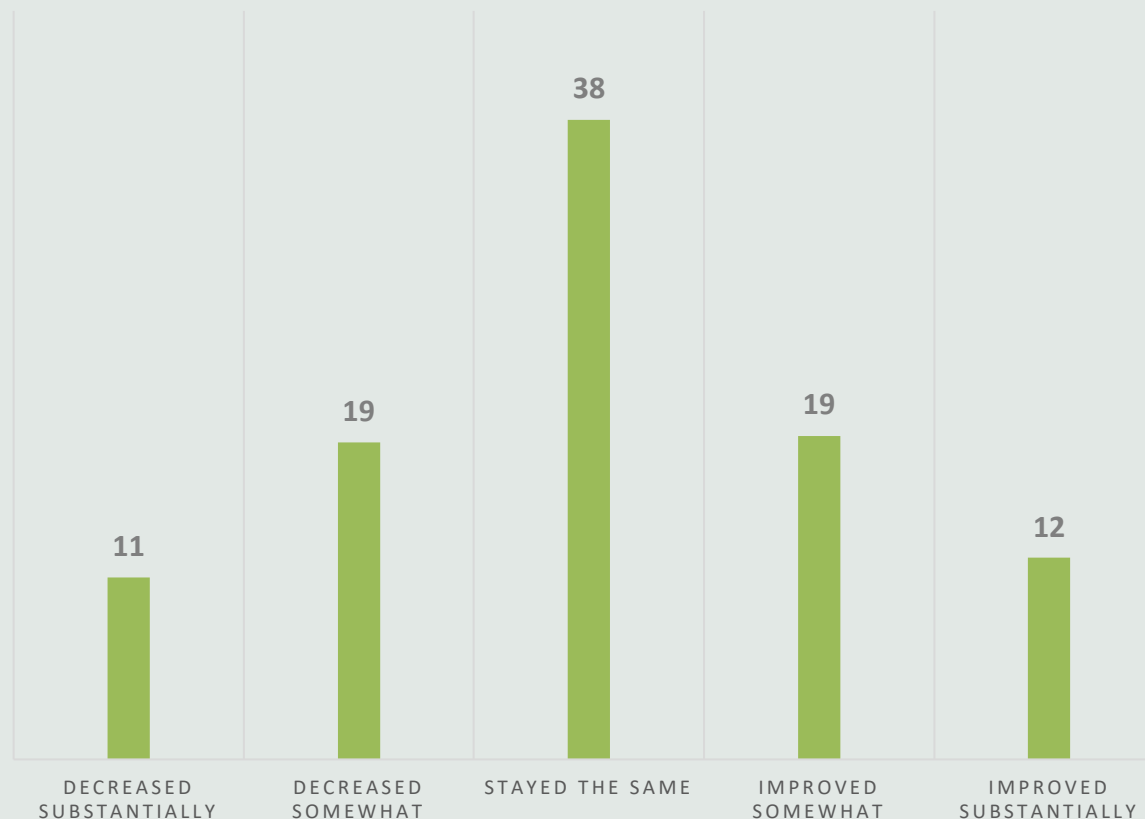
## MONTHLY WORKOUT FREQUENCY (AMONG THOSE WHO ARE ACTIVE)



Although the frequency with which consumers exercised improved slightly from pre-pandemic levels to current, nearly one-third said their fitness/exercise level decreased.

With that said, there is a perfect bell curve of users' perceptions of their exercise levels; 30% believe it decreased, 38% stayed the same and 31% says it increased.

### FITNESS/EXERCISE FREQUENCY CHANGES DURING PANDEMIC (% AMONG THOSE WHO ARE ACTIVE)



# Motivating Factors Influencing Active Lifestyles





# Measuring the Influence of Motivational Factors on Active Lifestyles

- In this section we explore factors that drive motivation for active consumers. Batteries of attributes for two types of psychological motivational behaviors were presented for active consumers to consider and rate; a list of 23 intrinsic behaviors and a list of 31 extrinsic behaviors.
- For the intrinsic behaviors, active consumers were asked to rate attributes based on the extent to which each plays a role with why they have interest in or participate in a health/fitness routine.
- For the extrinsic behaviors, a similar line of questioning was offered, but framed as to what the active consumer values most about pursuing a health/fitness routine.



# What is Intrinsic and Extrinsic Motivation?

## Intrinsic Motivation:

The act of doing something without any obvious external rewards. You do it because it's enjoyable and interesting, rather than because of an outside incentive or pressure to do it, such as a reward or deadline.

## Extrinsic Motivation:

An external incentive to engage in specific activity, especially motivation arising from the expectation of punishment or reward.



# Intrinsic Motivators: Key Points of Differentiation Among Active Consumer Segments

*The underlying motivational factors are basically the same by gender. Both rankings and ratings show very few differences.*

*The long-term health benefits of working out are primary to all age segments. For the 18 to 24 age segment, the element of working out being fun is unique to this group.*

*The importance of the “health benefits” associated with an active lifestyle begin to become increasingly more prevalent as one ages.*

# Intrinsic Motivators

Without question, the driving force behind leading an active lifestyle is the benefits it has on one's long-term health. The health benefits coupled with specific fitness goals, an opportunity to learn self-discipline and the joy/pleasure that is received from a health/fitness routine all play a significant role with active consumer's motivation.

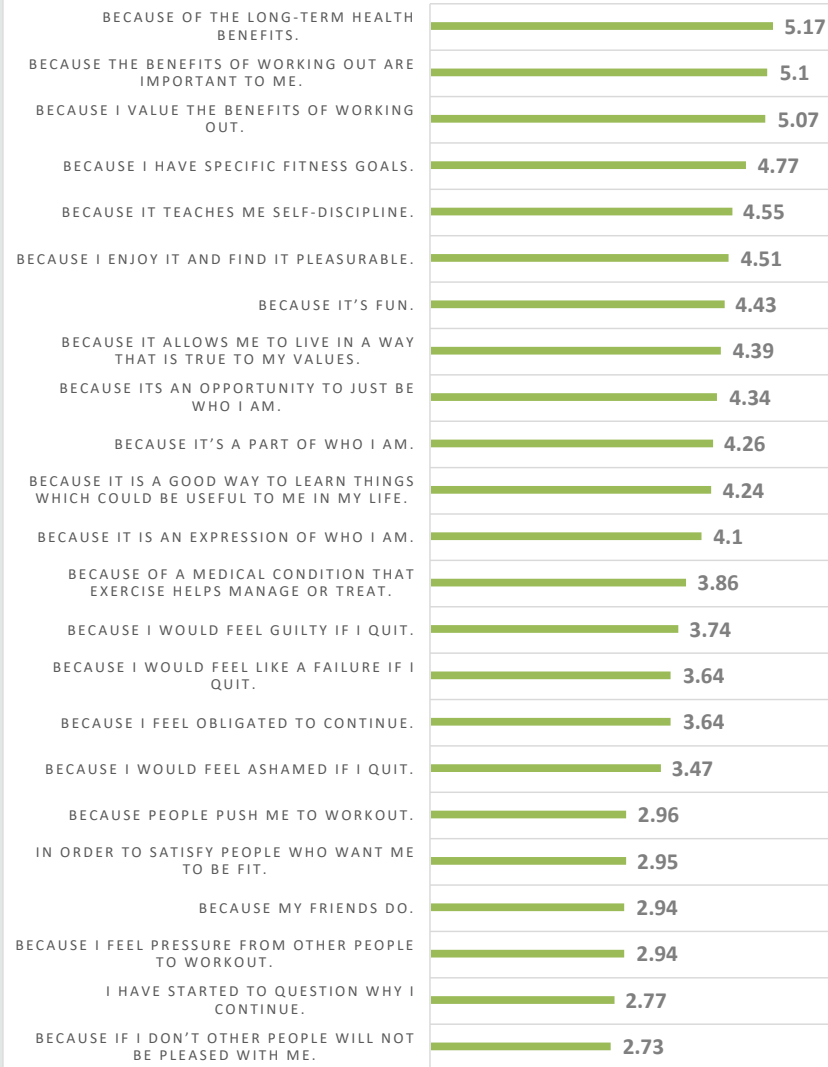
## INTRINSIC FITNESS BELIEFS REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



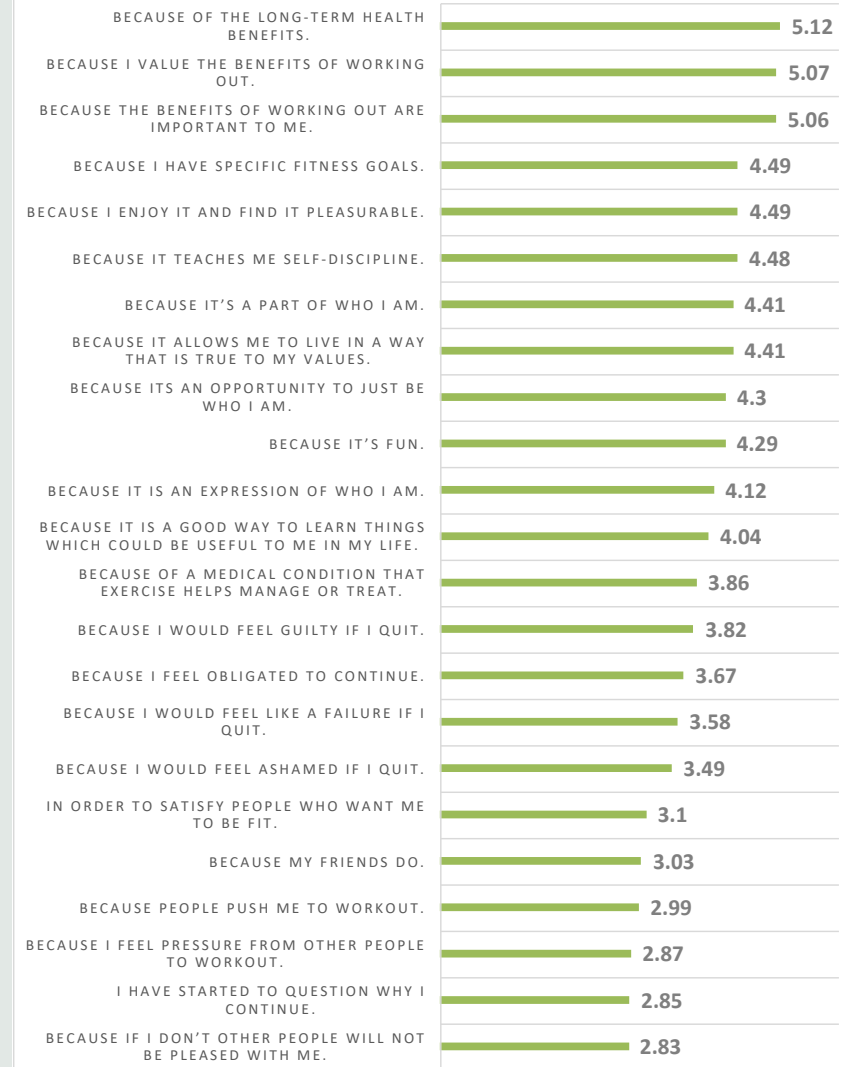
# Intrinsic Motivation by Gender

The underlying motivational factors are basically the same by gender. Both rankings and ratings show very few differences.

**INTRINSIC FITNESS BELIEFS**  
**REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE**  
**FEMALES**  
 (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



**INTRINSIC FITNESS BELIEFS**  
**REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE**  
**MALES**  
 (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)





# Intrinsic Motivation by Age - 18 to 24

The long-term health benefits of working out are primary to all age segments. For the 18 to 24 age segment, the element of *working out being fun* is unique to this group.

## INTRINSIC FITNESS BELIEFS REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE 18 TO 24 (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



# Intrinsic Motivation by Age - 25 to 39

Motivation for the 25 to 39 age segment mirrors that of the general active consumer with the key being its *health benefits*.

## INTRINSIC FITNESS BELIEFS REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE 25 TO 39 (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



# Intrinsic Motivation by Age - 40 to 55

As seen by the separation in ratings from the top factors, health benefits of an active lifestyle begin to become increasingly more prevalent as one ages.

## INTRINSIC FITNESS BELIEFS REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE 40 TO 55 (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



# Intrinsic Motivation by Age - 56 to 65

Motivational factors for the active aging consumer becomes fundamentally about the health benefits.

## REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE

56 TO 65

(MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)



# Intrinsic Motivation by Age - 66+

For seniors, the health benefits of an active lifestyle become fundamental truths for their motivation to exercise.

## INTRINSIC FITNESS BELIEFS REASONS FOR INTEREST IN OR PRESENTLY PARTICIPATING IN HEALTH/FITNESS ROUTINE 66 AND OLDER (MEAN SCORES AMONG ACTIVE USERS; 7=VERY TRUE)







# Extrinsic Motivators: Key Points of Differentiation Among Active Consumer Segments

*Beyond the universal motivators mentioned previously, there are a couple of nuances between the two genders. Slightly higher on the list for women are two factors: exercise helps to cope with daily pressures and there's a sense of pleasure given with discovering new levels of personal growth through exercise.*

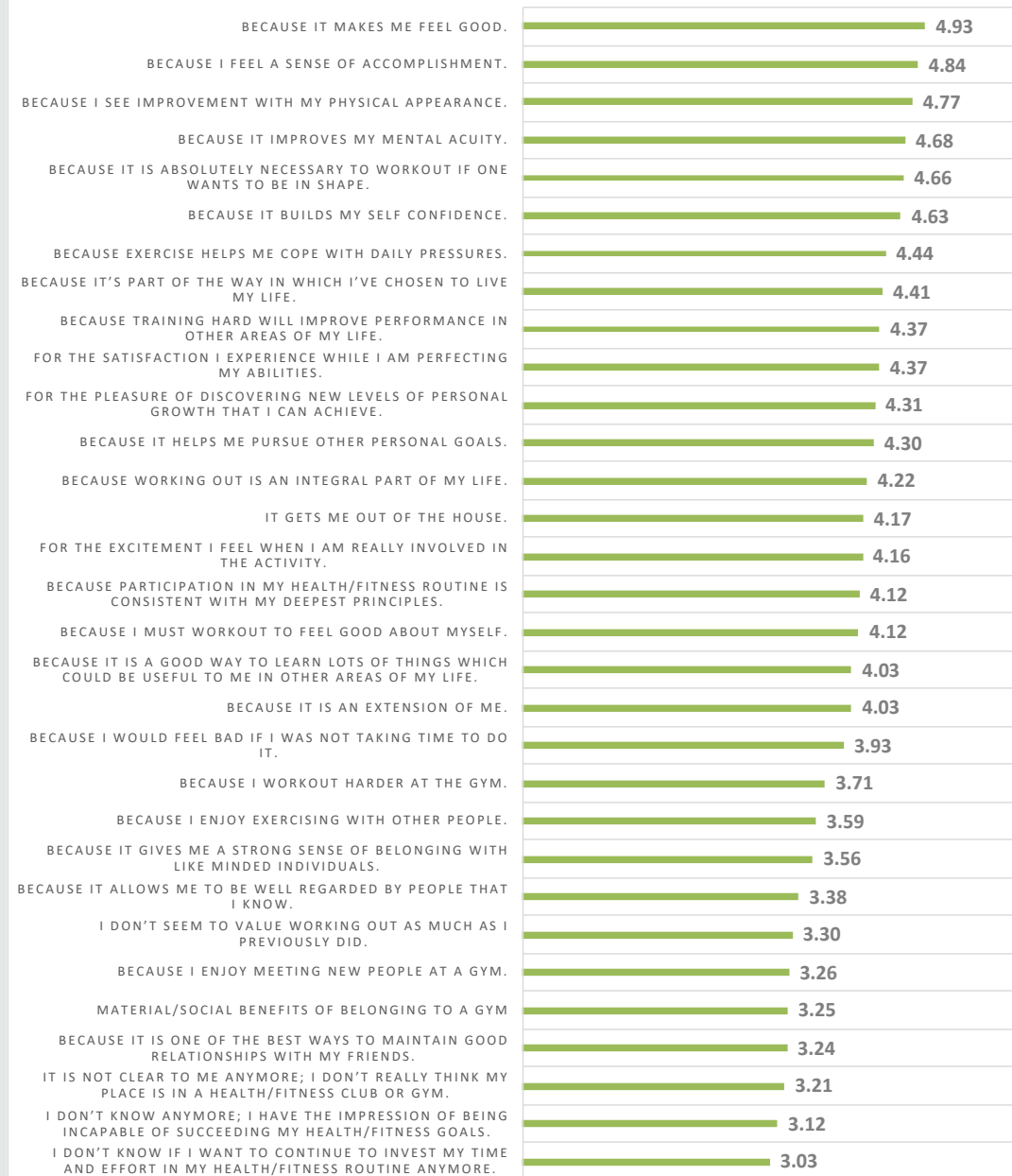
*With men, however, the idea of working out is a chosen way of life ranks higher.*

*For those between ages 18-39, building self confidence is a key point unique to this active consumer.*

# Extrinsic Motivators

A universal motivator, or truth, regardless of gender or age is a *healthy lifestyle simply makes people feel good*. Rounding out the top three “rewards” that active consumers value from pursuing a health/fitness routine are *feeling good, sense of accomplishment and improving their physical appearance*. These three motivators are closely followed by *improving mental acuity, a necessity to be in shape and building self-confidence*.

## EXTRINSIC FITNESS MOTIVATIONS WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE (MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)

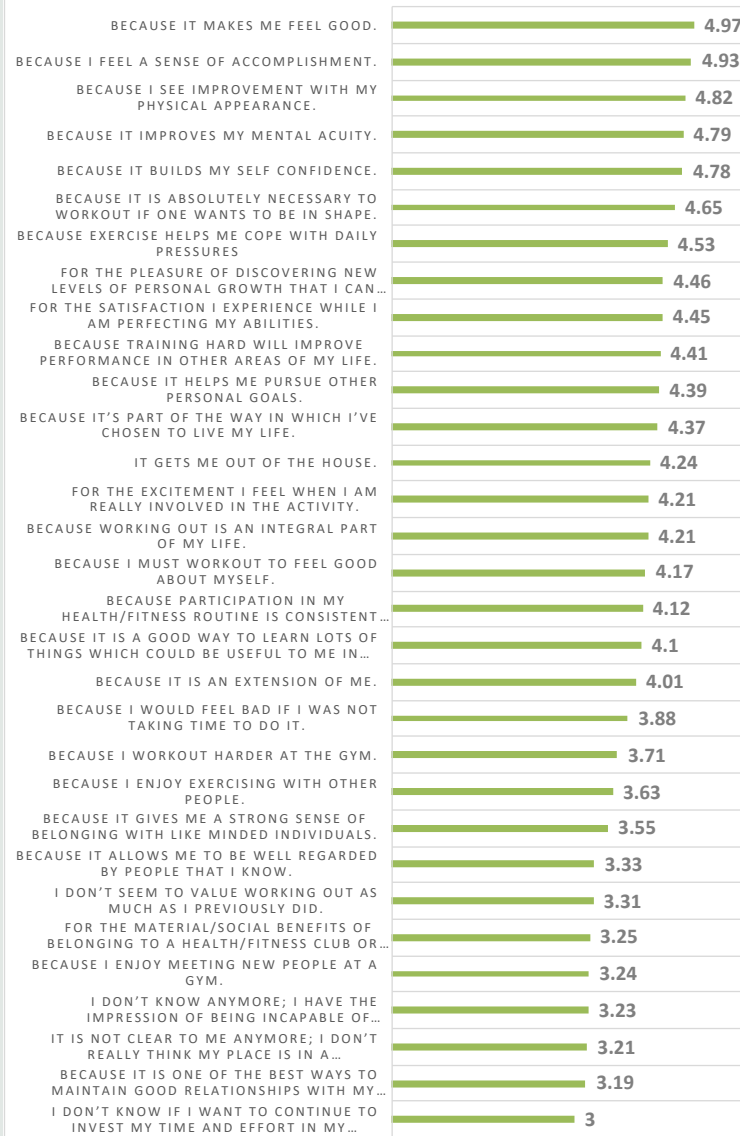


# Extrinsic Motivators by Gender

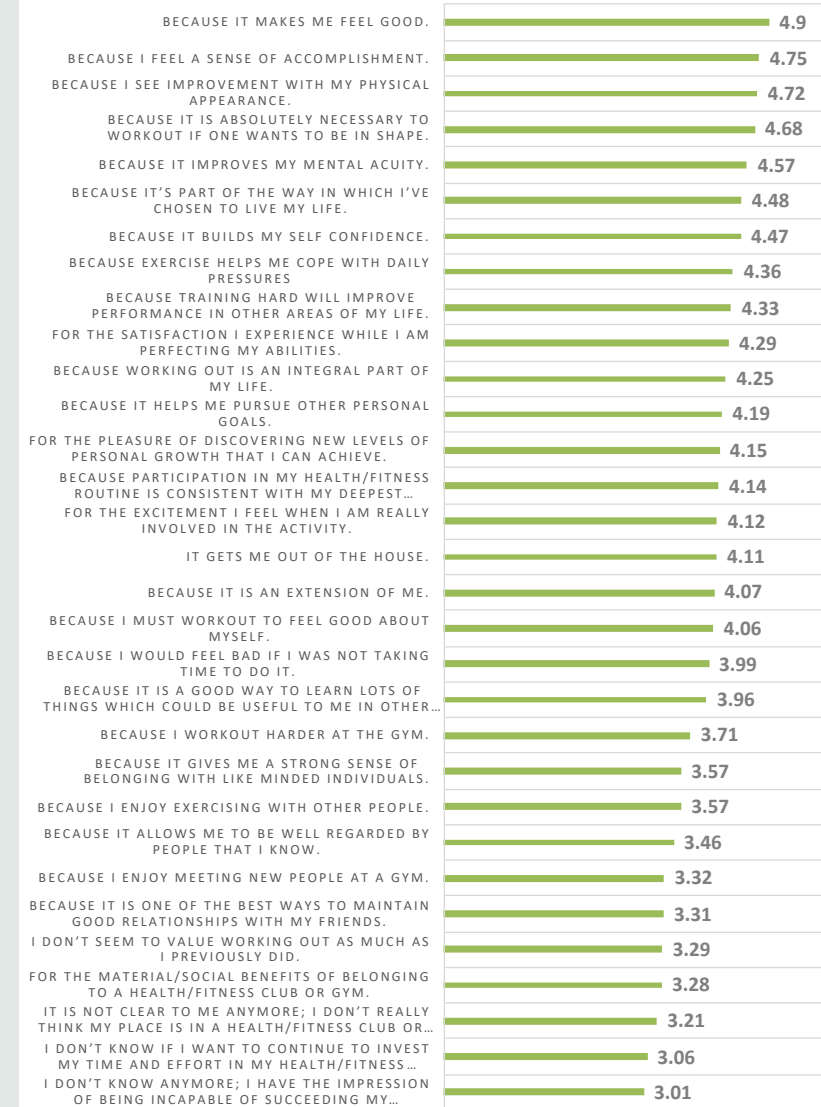
Beyond the universal motivators mentioned previously, there are a couple of nuances between the two genders. Slightly higher on the list for women are two factors: *exercise helps to cope with daily pressures and there's a sense of pleasure given with discovering new levels of personal growth through exercise.*

With men, however, the idea of *working out is a chosen way of life* ranks higher.

EXTRINSIC FITNESS MOTIVATIONS  
WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE  
FEMALES  
(MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)



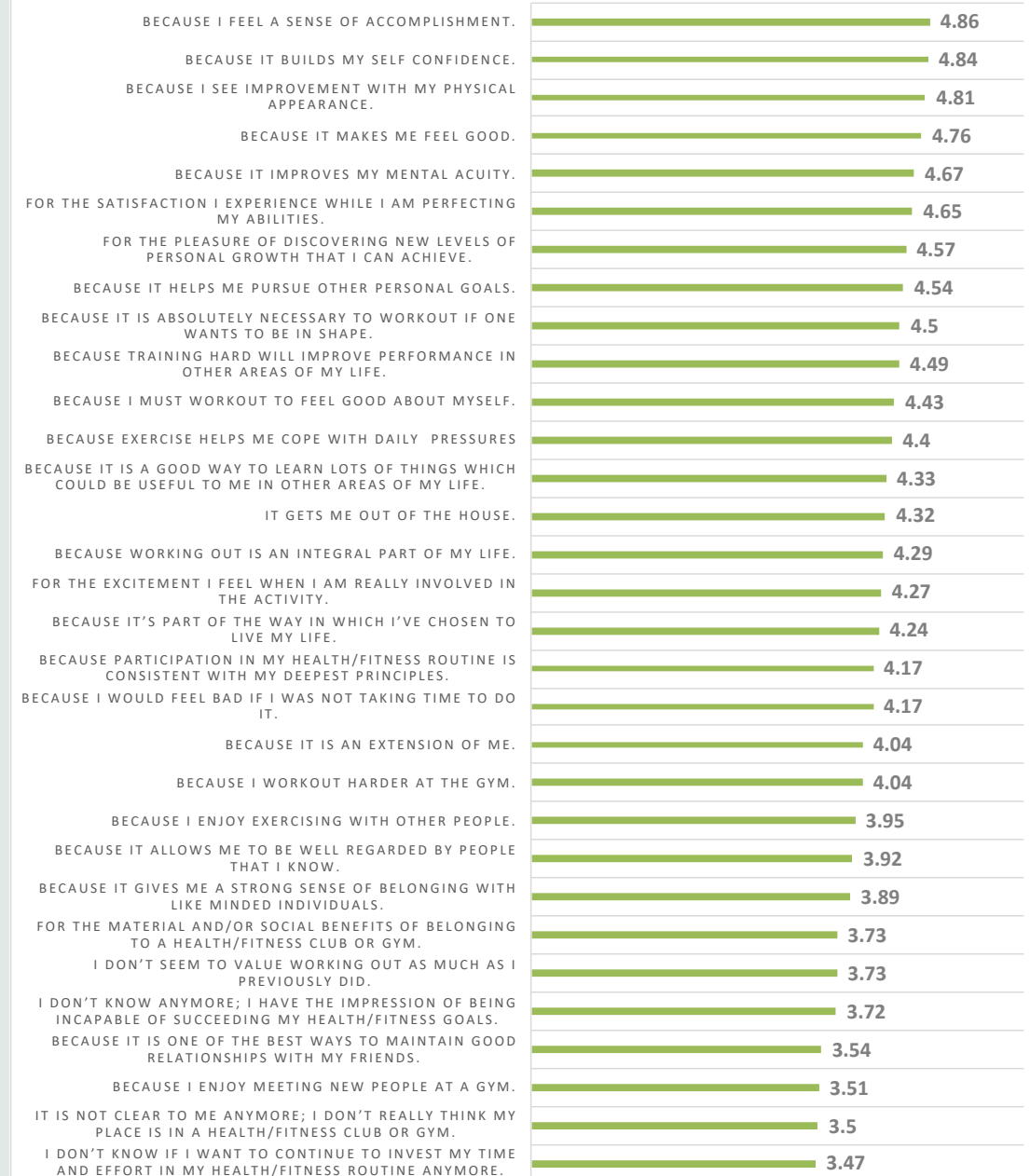
EXTRINSIC FITNESS MOTIVATIONS  
WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE  
MALES  
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# Extrinsic Motivators by Age: 18 to 24

Key motivators: a sense of accomplishment, building self-confidence and improving physical appearance

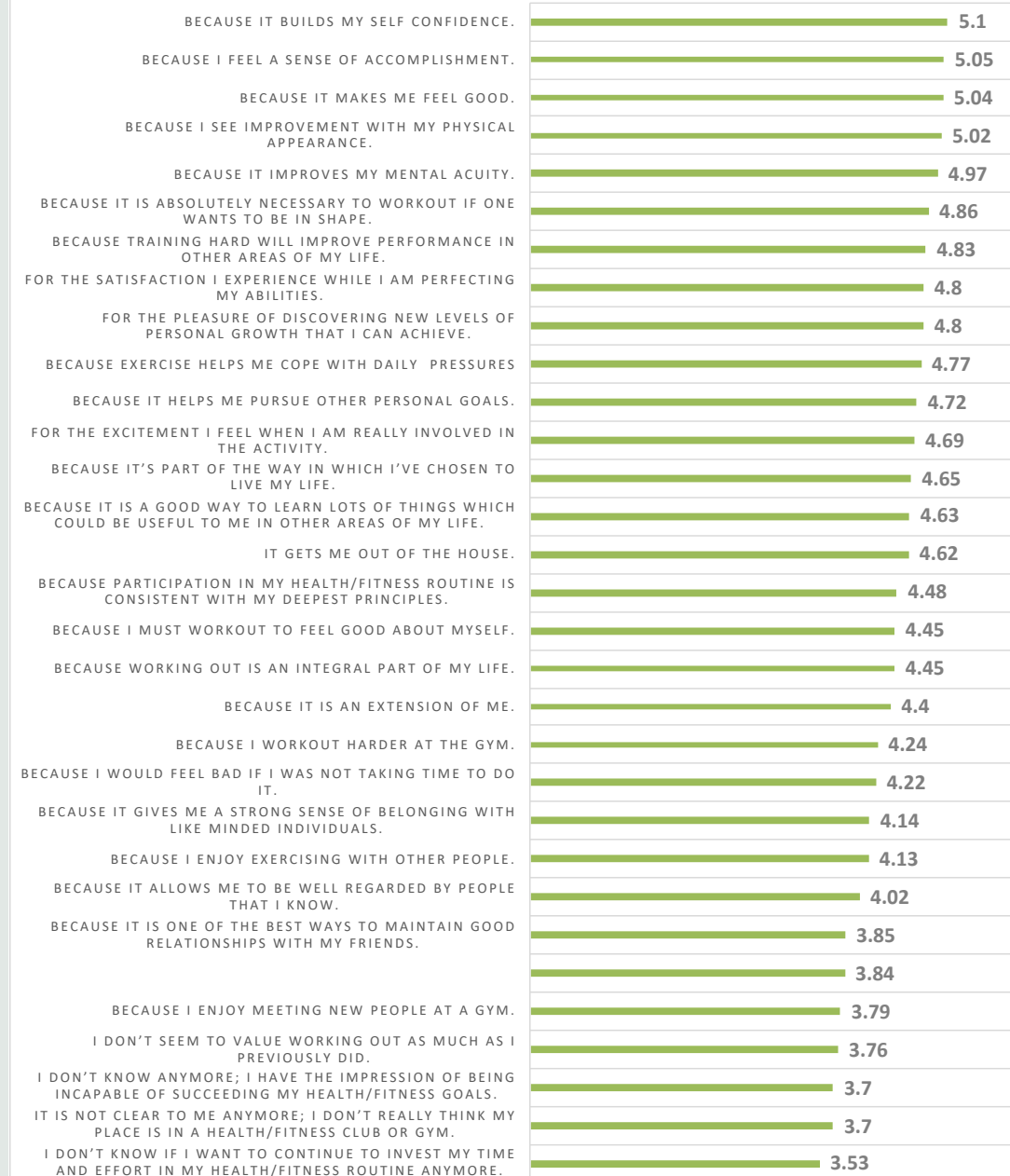
## EXTRINSIC FITNESS MOTIVATIONS WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE 18 TO 24 YEAR OLDS (MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)



# Extrinsic Motivators by Age 25 to 39

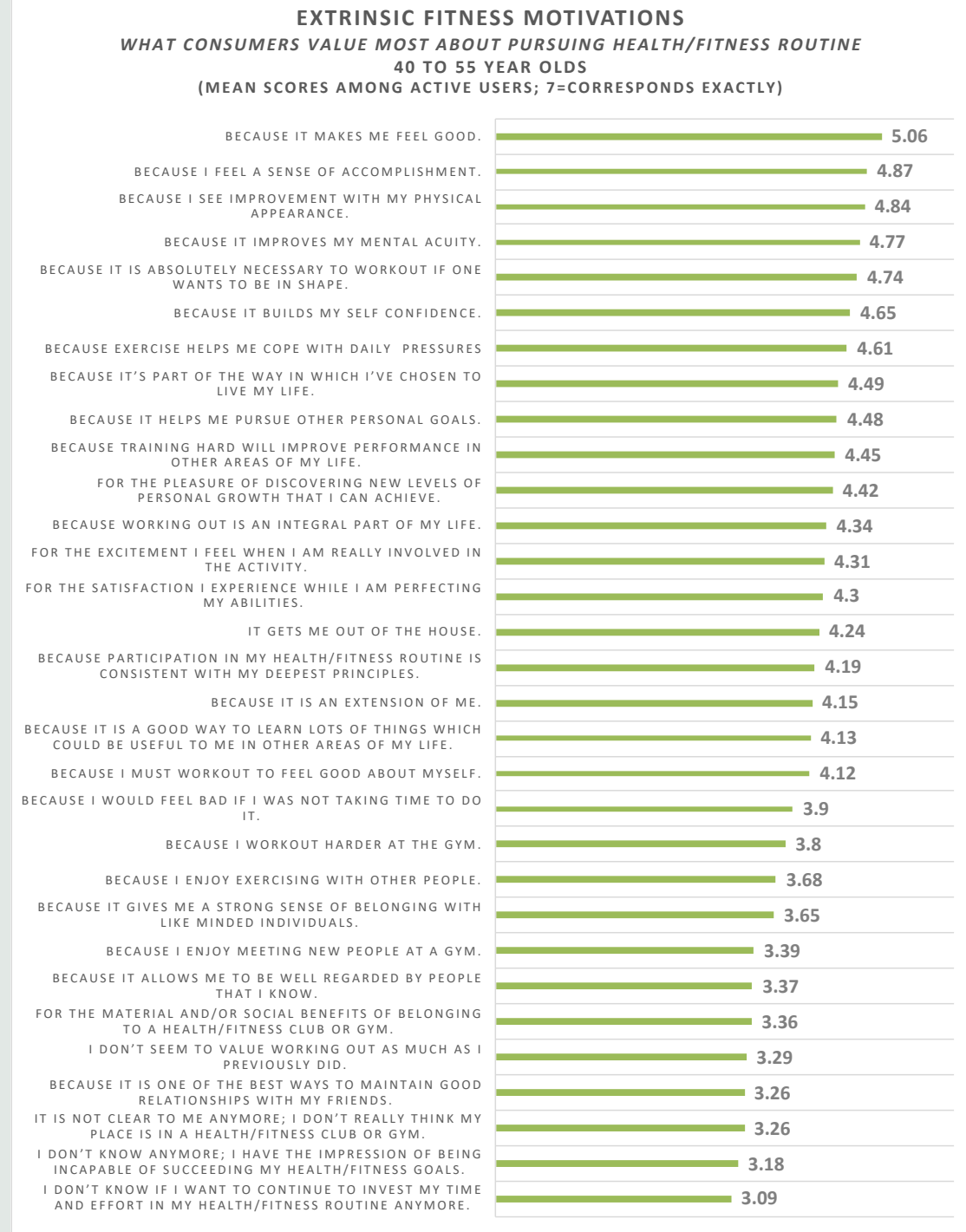
Key motivators: building self-confidence, sense of accomplishment, feeling good and physical appearance

**EXTRINSIC FITNESS MOTIVATIONS**  
**WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE**  
**25 TO 39 YEAR OLDS**  
**(MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)**



# Extrinsic Motivators by Age 40 to 55

Key motivators: feeling good,  
sense of accomplishment,  
physical appearance and  
improving mental acuity

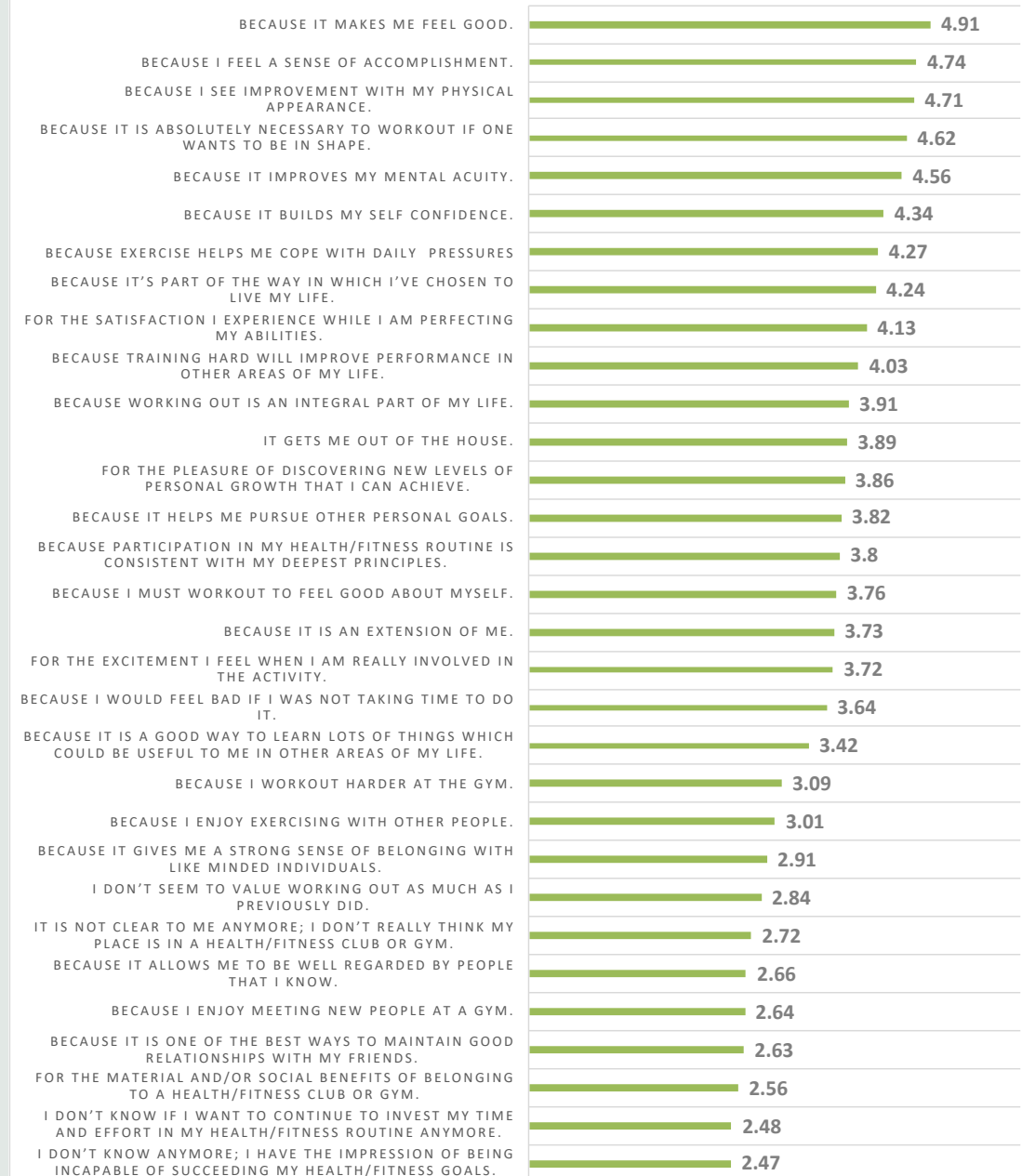




# Extrinsic Motivators by Age 56 to 65

Key motivators: feeling good,  
sense of accomplishment and  
physical appearance

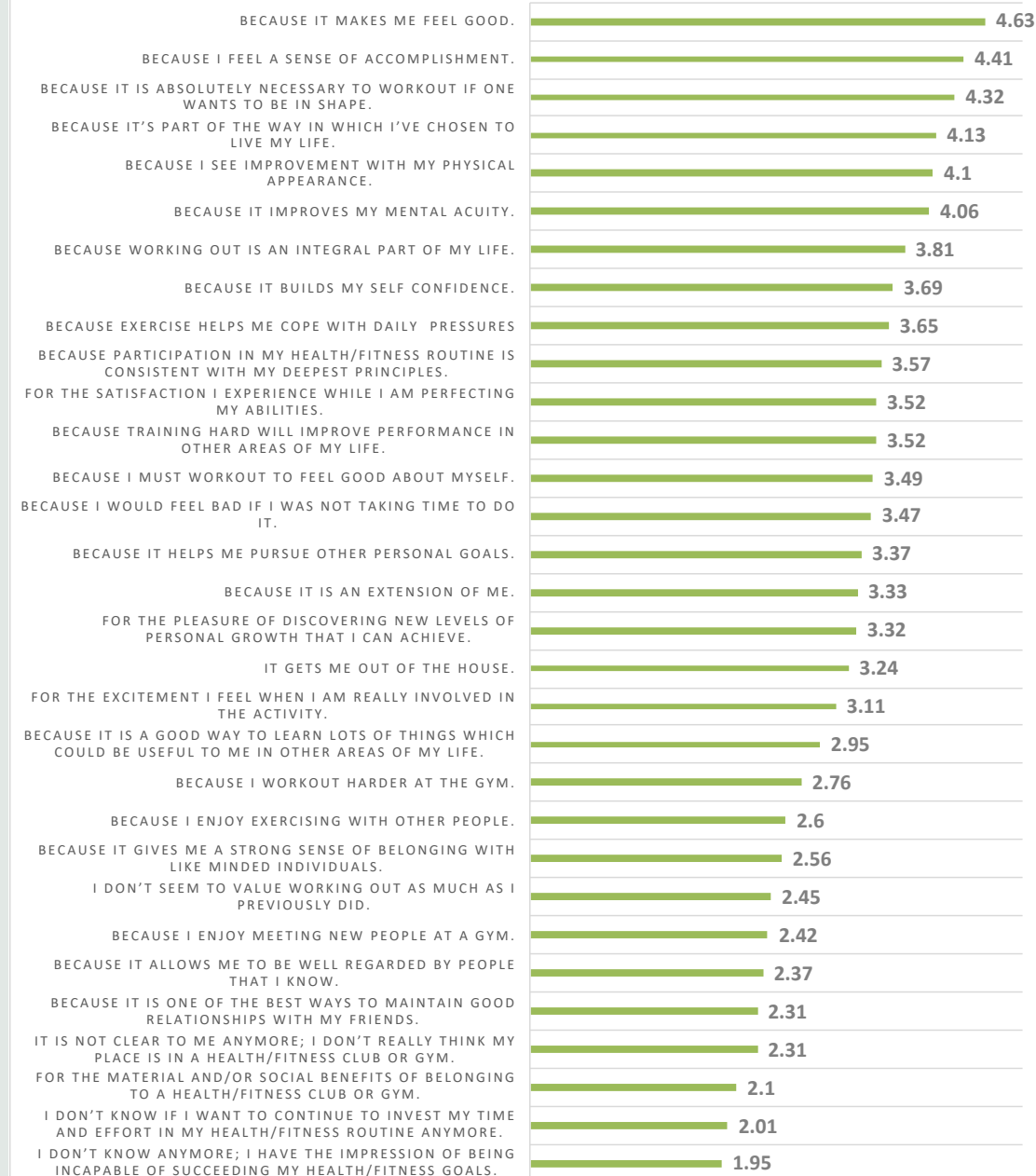
## EXTRINSIC FITNESS MOTIVATIONS WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE 56 TO 65 YEAR OLDS (MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)



# Extrinsic Motivators by Age 66+

Key motivators: feeling good,  
sense of accomplishment and it's  
a necessity to be in shape

**EXTRINSIC FITNESS MOTIVATIONS**  
**WHAT CONSUMERS VALUE MOST ABOUT PURSUING HEALTH/FITNESS ROUTINE**  
**66 AND OLDER**  
**(MEAN SCORES AMONG ACTIVE USERS; 7=CORRESPONDS EXACTLY)**





# Appendix



# About ABC Fitness Solutions



ABC Fitness Solutions ([abcfitness.com](https://abcfitness.com)) is the premier provider of software and related services for the health and fitness industry. Building on a reputation for excellence in support for clubs and their members, ABC is the trusted provider to boost performance and create a Total Fitness Experience for members of clubs of all sizes, whether a national franchise, regional chain, or a local gym. Founded in 1981, ABC helps nearly 16,000 clubs and facilities globally perform better and more profitably, offering a comprehensive SaaS club management solution that enables club operators to achieve optimal performance.

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

**Website:** <https://abcfitness.com>

**Phone:** 866-364-4596

# About The IHRSA Foundation



The **IHRSA Foundation** was established in 2012 as a 501(c)(3) charitable organization with a goal to promote health through exercise. Its purpose is to support the charitable and educational functions of **IHRSA**, The Global Health & Fitness Association.

The IHRSA Foundation focuses on four key areas:

- **Programs:** Promote programs that support health through exercise.
- **Research:** A focus on outcomes-based research to support physical activity and engaging programming.
- **Education:** Provide education and resources to support health promotion and wellness.
- **Engagement:** Encourage involvement with the IHRSA Foundation and our mission.

# 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.

For additional details, visit us at [www.club-intel.com](http://www.club-intel.com)