



provoked
insights

*Health & Fitness: Consumer Trends
Summer 2023*

Background & Objectives

Overview

Provoke Insights, a leader in research for branding, advertising, media, and content marketing initiatives, conducts a bi-annual consumer trends study to keep a pulse on the market across multiple industries. The extensive study allows Provoke Insights to stay ahead of the trends and understand consumer mindset in the current moment.

As economic uncertainty looms, American consumers are changing their buying habits. Fitness gear brands need to understand how this is impacting purchase decisions and budgets.

Methodology

Provoke Insights conducted a 15-minute survey among 1,500 Americans between the ages of 21 and 65. The study was in-field in Spring 2023.

A random stratified sample was used to ensure a high degree of sample representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).¹

Results based on this sample have a maximum margin of sampling error $\pm 2.5\%$ at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

Health & Fitness Habits

Health is top of mind for only half of Americans. These individuals are proactively supplementing their health by incorporating vitamins, vegetables, and fruit into their daily routine. However, only two-fifths are consistently seeing doctors, and another fifth are dieting. This is especially true of affluent Americans.

More than half of Americans are exercising three times a week. Those most active are affluent, male, and younger. The most popular activities are hiking, biking, and running.

Shopping Trends

Fitness gear purchases have gone back to Fall 2021 levels. These shoppers prefer browsing through the store, as well as sticking with brands they are familiar with. They are conscious consumers as they are more likely to switch to brands that align with their values, and pay more for sustainably sourced items.

Compared to other industries, fitness gear shoppers are more price-conscious when purchasing these items as quality is less influential. However, if a recession occurs, few Americans will purchase these items at the same rate. Most are confident they could live without these items for a short time or cut out purchasing them completely.

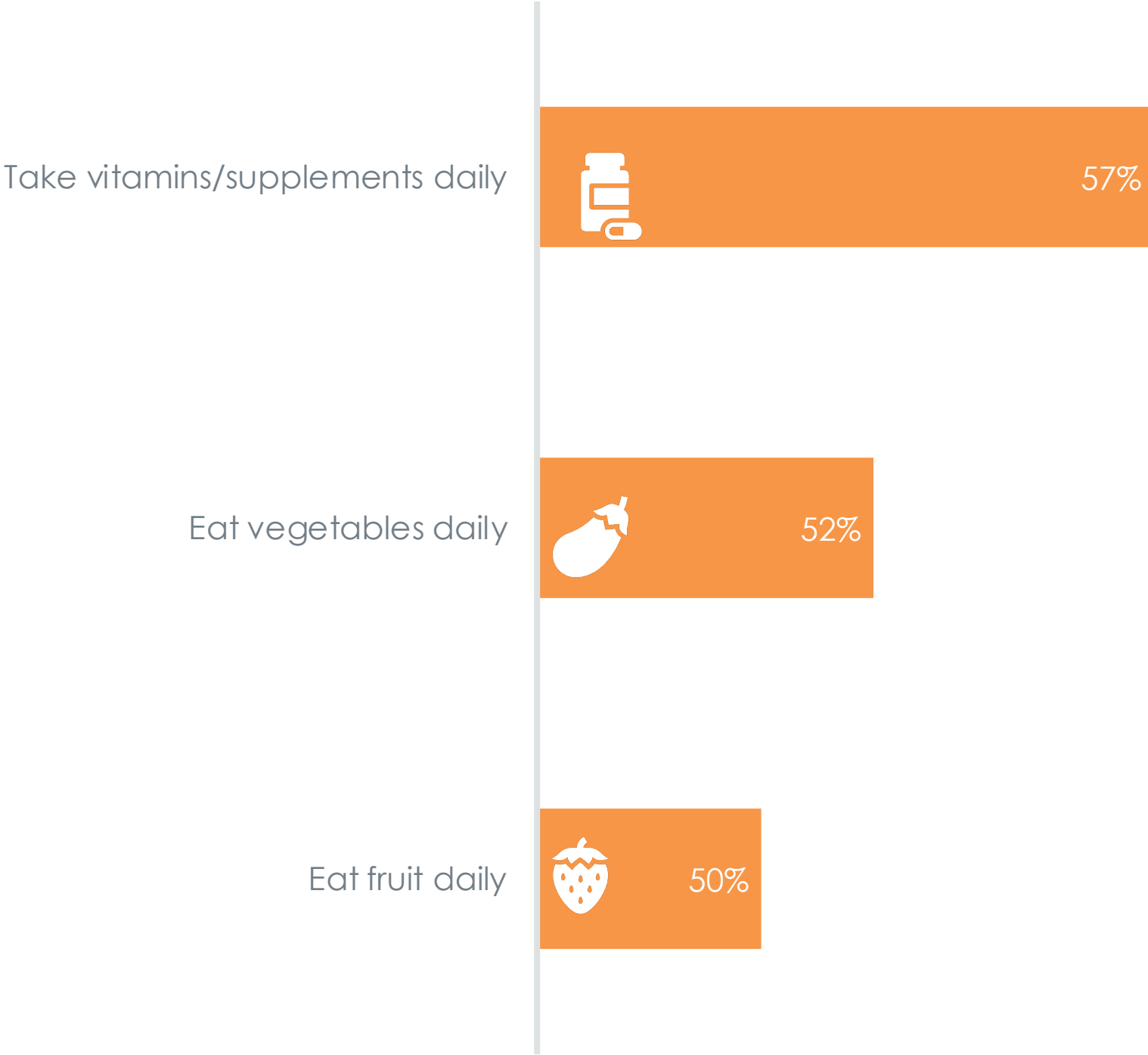
Overview



Health Trends

Daily Health Habits

Half of consumers are proactively supplementing their health routine by incorporating vitamins, vegetables, and fruit into their daily routine.



Groups Significantly More Likely to See a Doctor Consistently...



Only **44%** of Americans get an annual check-up

- B** 67% Boomers
- \$** 56% HHI \$150K+
- 📍** 53% Live in the Northeast
- 🏠** 49% Suburban

Groups Significantly More Likely to Diet...



20% of
Americans are
currently dieting

-  28% Less budget conscious
-  25% HHI \$150K+

A close-up, low-angle shot of a person's legs running on a treadmill. The person is wearing black athletic shoes with a prominent red sole. The treadmill is positioned in front of a large window that provides a view of a lush, green outdoor area. The lighting is bright and natural, suggesting a daytime setting. A dark blue semi-transparent box is overlaid on the left side of the image, containing the text 'Fitness Trends' in white.

Fitness Trends

Groups Significantly More Likely to Exercise Consistently...

55% of Americans exercise at least 3x a week

\$ 63% HHI \$100K+

📍 65% Live in the West

👤 58% Males

🏠 58% Suburban

😊 58% More Optimistic

M 57% Millennials

Americans who
exercise 3x week are...

Americans Stay Active



31% Hiking



29% Biking



27% Running



13% Team sports



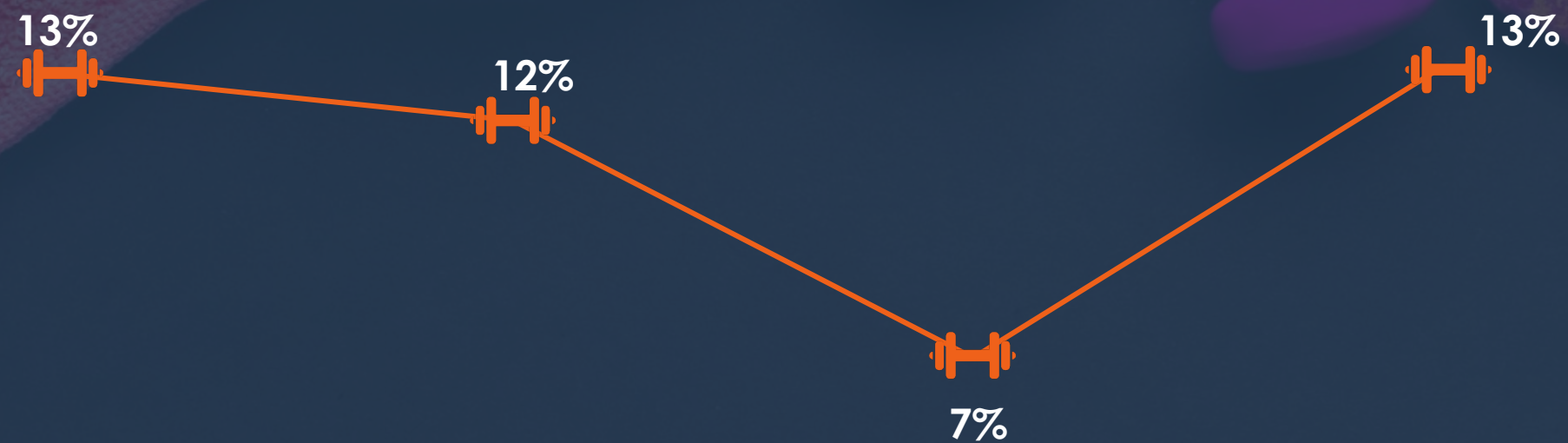
12% Golf



7% Tennis

Seasonal Fitness Gear Purchases

Fitness gear purchases have gone back to Fall 2021 levels.



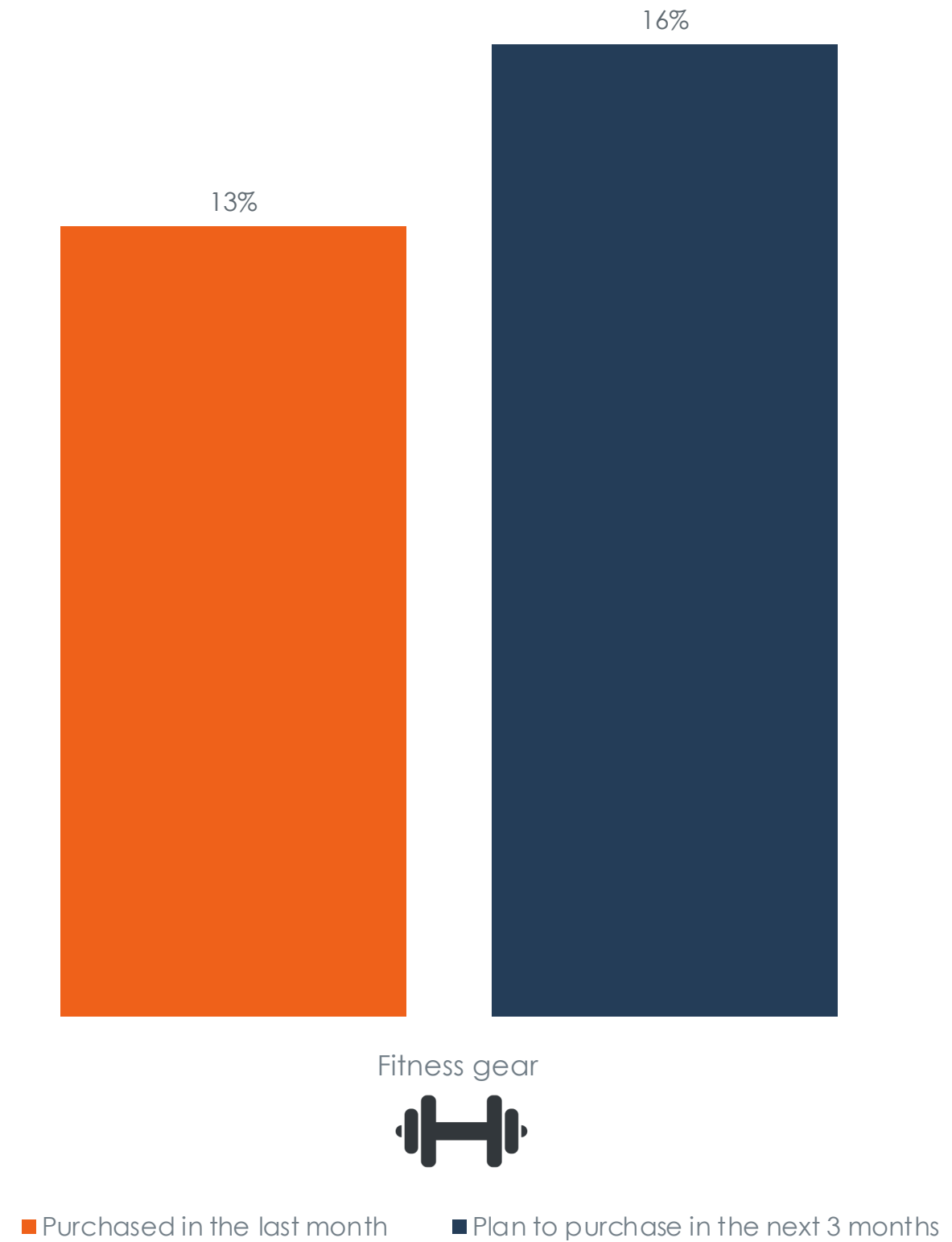
Fall 2021

Spring 2022

Fall 2022

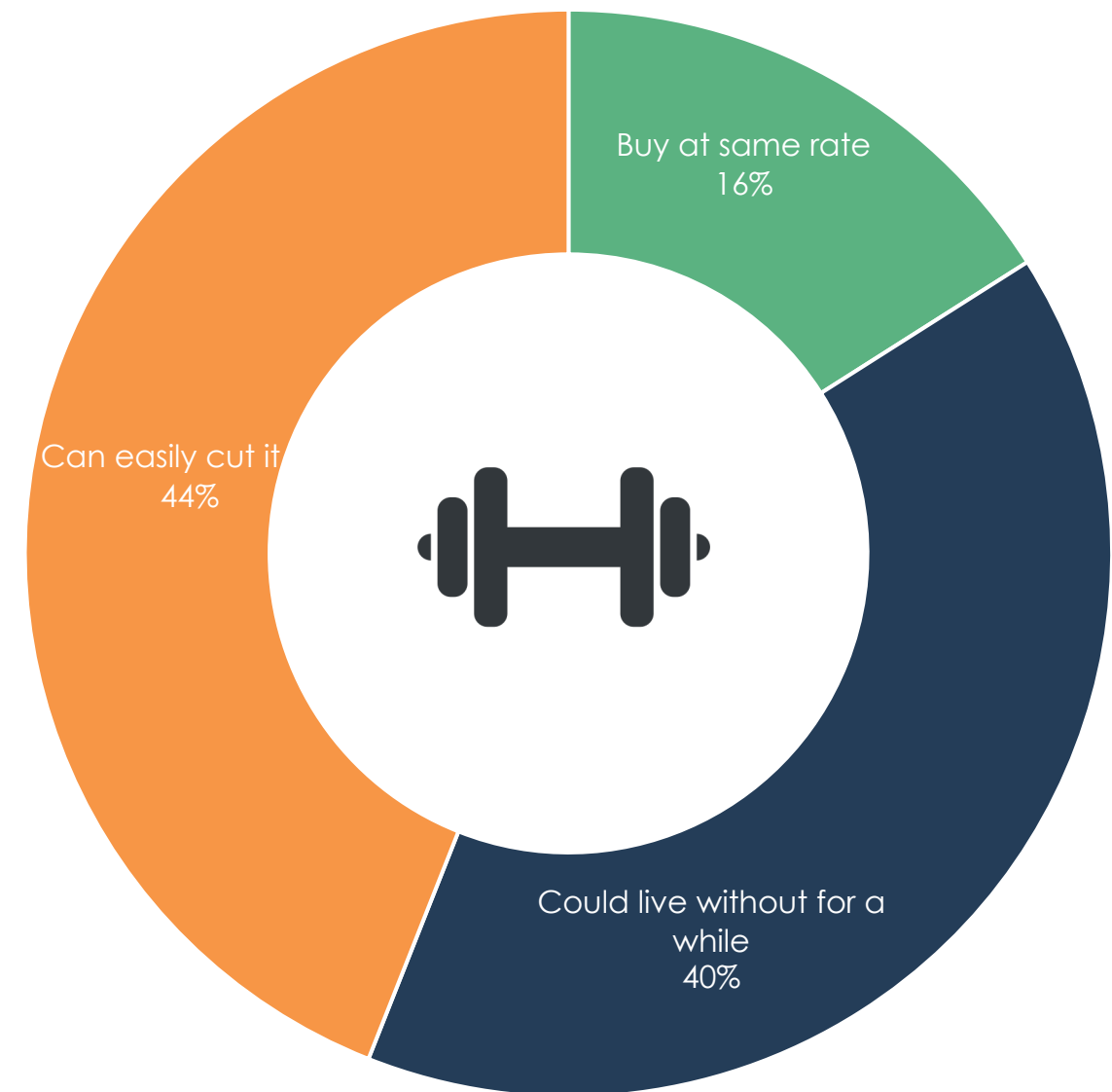
Spring 2023

Americans will continue to spend on fitness gear in summer 2023.



Fitness Gear Spending Behavior Change

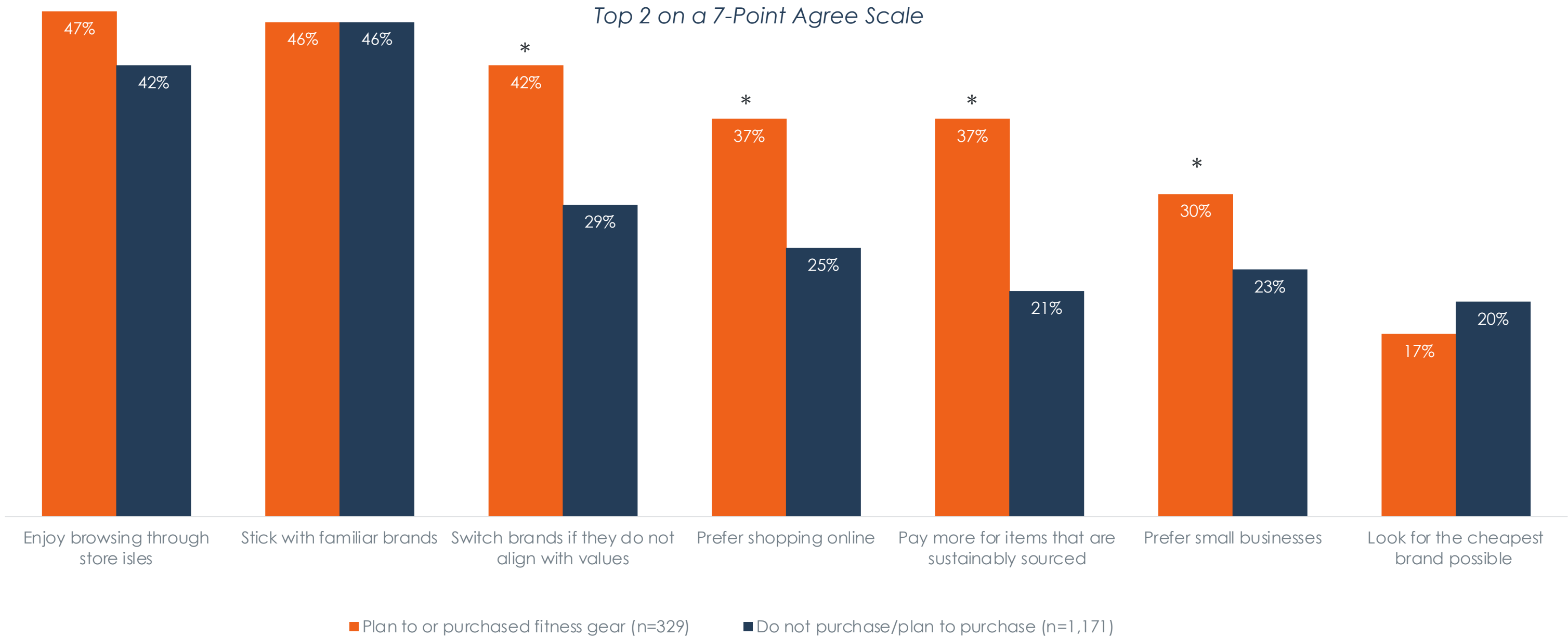
If a recession occurs, few Americans will purchase these items at the same rate. Most are confident they could live without these items for a short time or cut out purchasing them completely.



Shopping Habits



Fitness gear shoppers prefer browsing through the store, as well as sticking with brands they are familiar with. Compared to non-fitness gear purchasers, these consumers are more likely to switch to brands that align with their values, pay more for sustainably sourced items, and shop small business.



*indicates significant difference

Quality vs. Price

Consumers are more price-conscious when purchasing fitness gear. Compared to other industries, quality is less influential when purchasing these items.

Quality Index By Industry

Skincare	15%
Major appliances	14%
Electronics	14%
Furniture	14%
Home improvement items	9%
Fine jewelry/watches	4%
Beauty supplies	2%
Outdoor gear	1%
Apparel	0%
Fitness gear	-6%
Hotel stays	-7%
Alcohol	-12%
Toys	-16%
Airline tickets	-34%

Index created by percent who stated quality over price minus the average

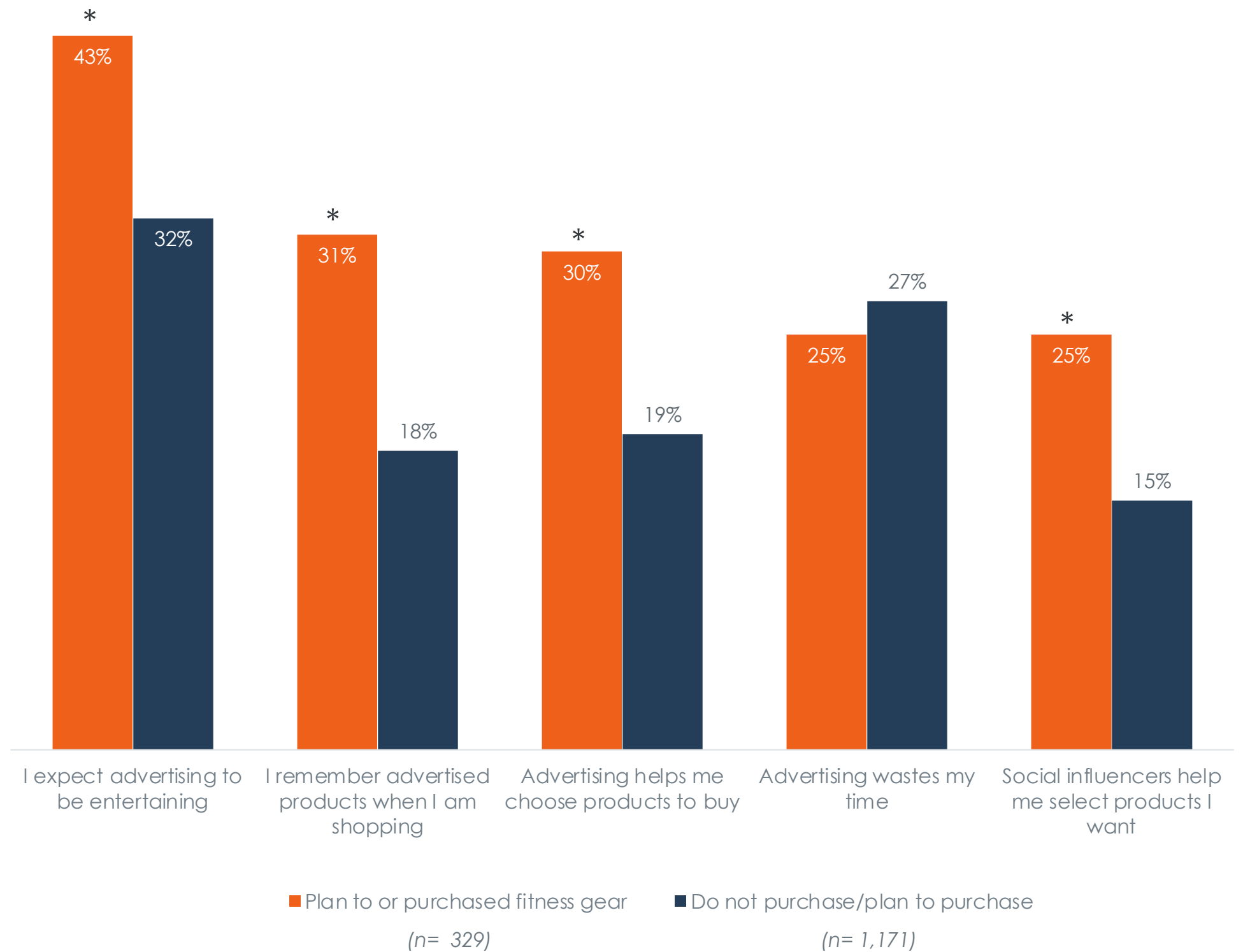
Price Index By Industry

Airline tickets	34%
Toys	16%
Alcohol	12%
Hotel stays	7%
Fitness gear	6%
Apparel	0%
Outdoor gear	-1%
Beauty supplies (not skincare)	-2%
Fine jewelry/watches	-4%
Home improvement items	-9%
Furniture	-14%
Electronics	-14%
Major appliances	-14%
Skincare	-15%

Index created by percent who stated price over quality minus the average

Top 2 on a 7-Point Agree Scale

Those who purchase fitness gear are more receptive to advertising.

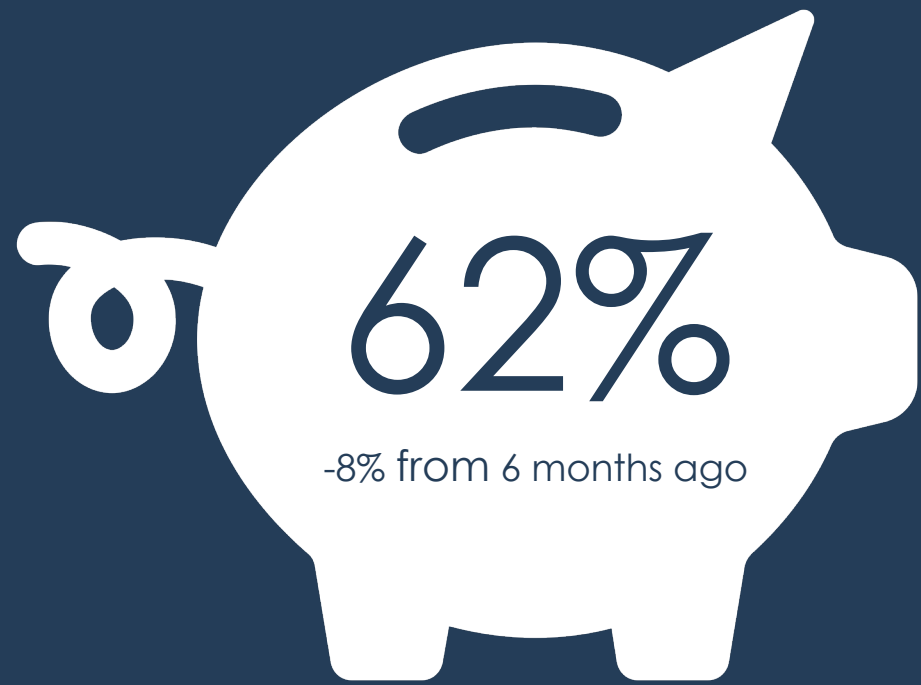


* Indicates a significant difference

External Trends Impacting Brands in Spring/Summer 2023



Consumers are still in saving mode, particularly those who live in rural areas out West.



**More Budget
Conscious in the Last 6
Months**

Who is Significantly More Likely to Be in Saving Mode



69% Live in Rural area



66% Live in the West

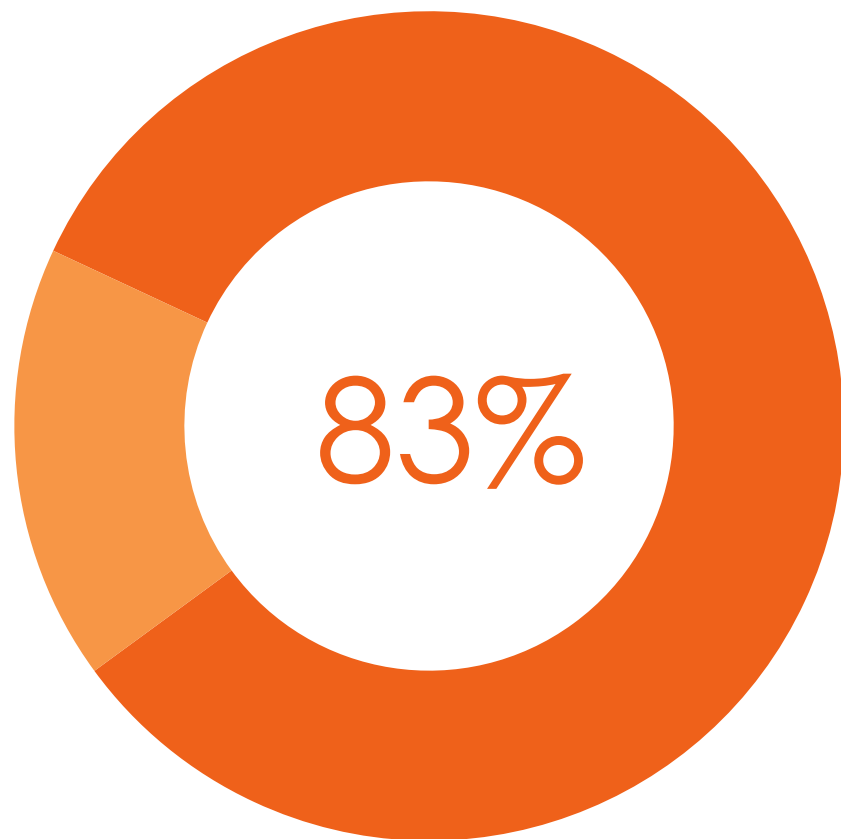
B

65% Baby boomers

Spending Behavior Changes

Consumers are couponing and shopping at discount stores more.

Changed Spending Behavior in the Last 3 Months



Base: All Qualified Respondents (N=1,500)



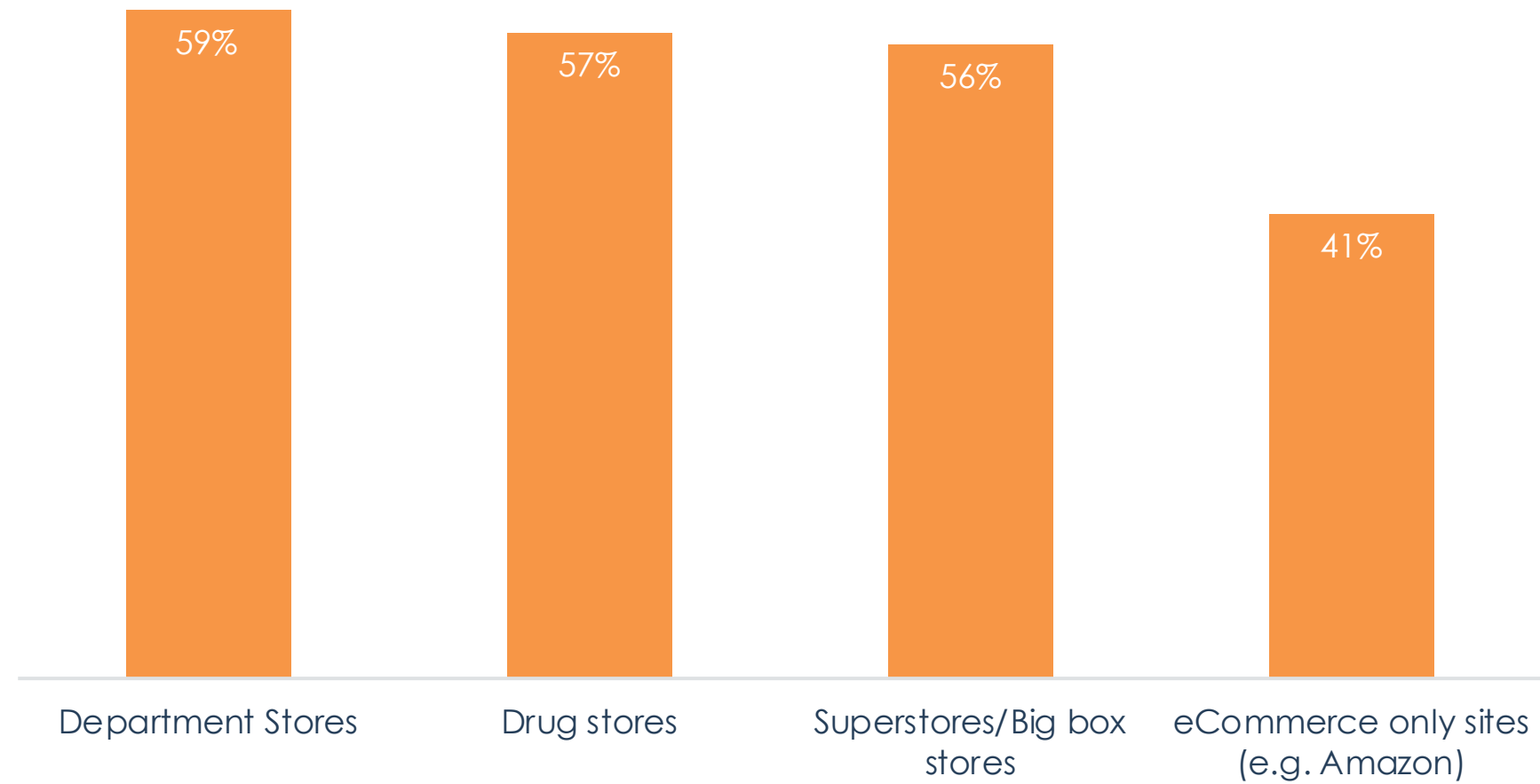
Ways Spending Behaviors Have Changed



Base: Spending behavior has changed (n=1,250)

Price Increases

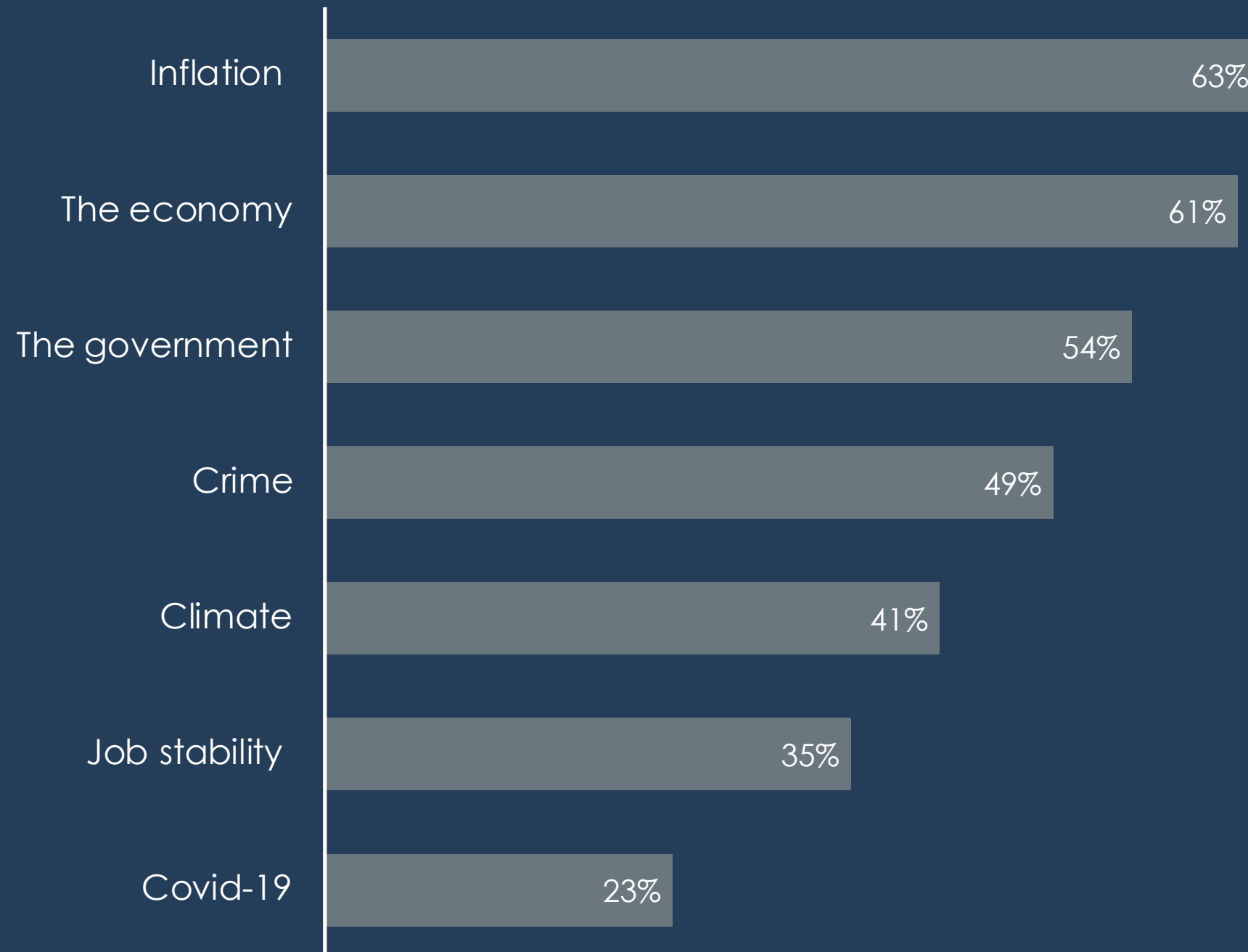
Consumers are noticing price increases at retailers across the board.



Top Concerns Impacting Consumers

Inflation and the economy are the leading issues impacting Americans.

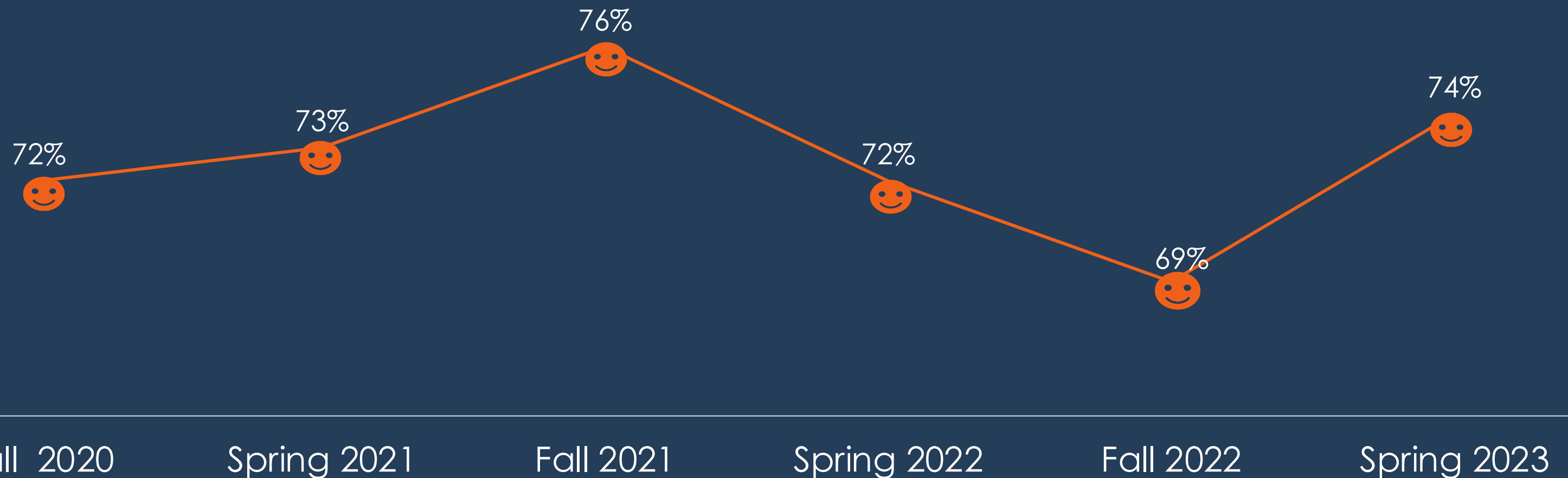
Extremely/Very Concerned
(5-point scale)



Consumer Optimism


Optimism levels are at the highest levels since Fall 2021.

Very/Moderately Optimistic




Finding the Optimism In Everyday

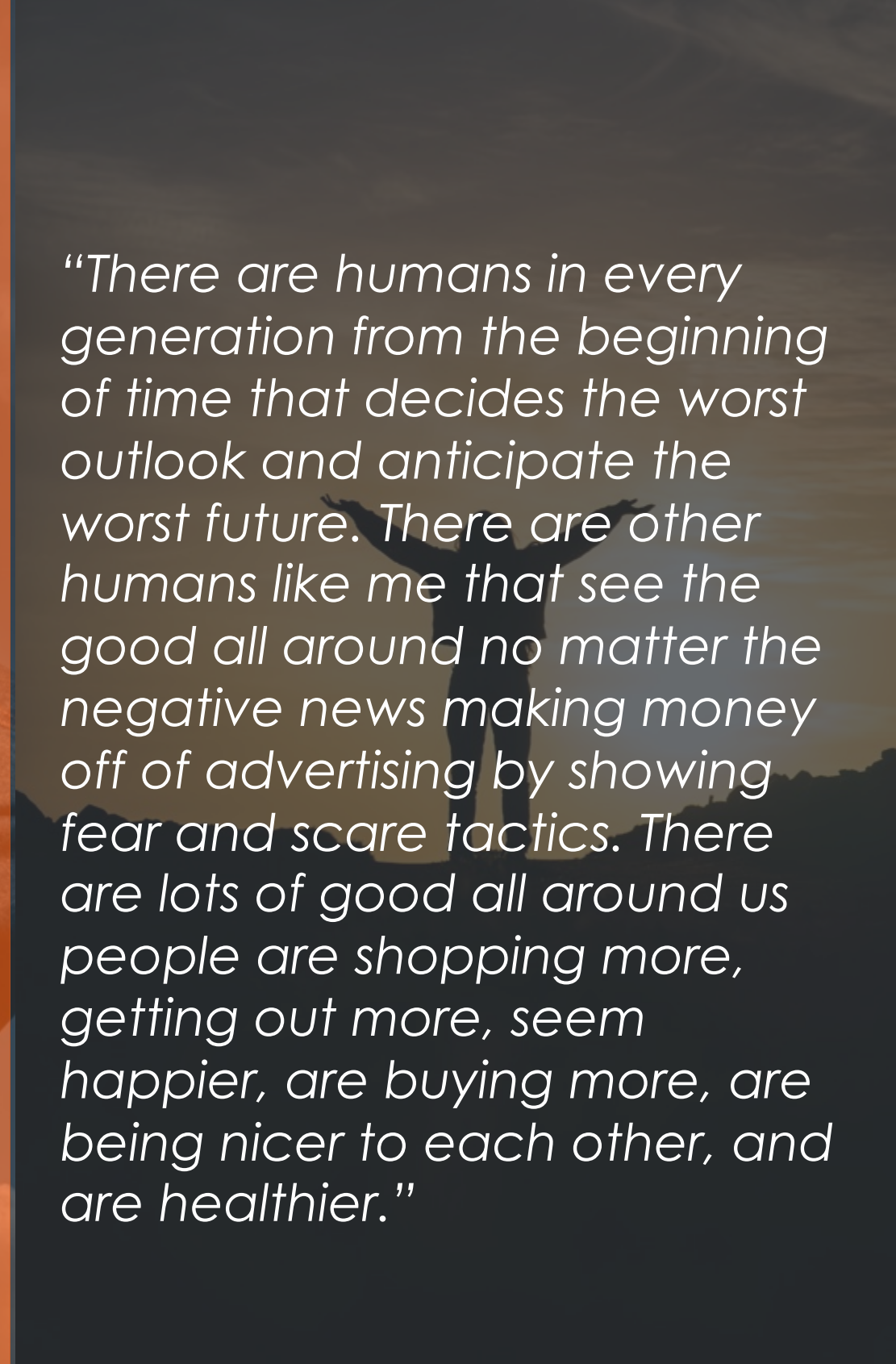
"I am optimistic about the future because of the younger generation. Today's youth are growing up in a more inclusive, diverse, and progressive world than ever before. They are passionate, informed, and eager to make a positive impact. Young people are driving change through activism, innovation, and social entrepreneurship. They advocate for a better future, demand action on important issues, and challenge the status quo."



"I am generally optimistic and believe that "tomorrow is another day", meaning every day is an opportunity to improve upon the past and make a brighter future."



"There are humans in every generation from the beginning of time that decides the worst outlook and anticipate the worst future. There are other humans like me that see the good all around no matter the negative news making money off of advertising by showing fear and scare tactics. There are lots of good all around us people are shopping more, getting out more, seem happier, are buying more, are being nicer to each other, and are healthier."



Relevant Concerns Fuel Lack of Optimism

Divisive Government

“If our country were less politically and economically divisive, I would feel more optimistic. People have lost the ability to disagree in a civil manner. Our healthcare system is a nightmare. We do not take care of our society's most vulnerable.”

“People stop hating each other over politics & race, opinions. Get rid of political parties only interested in themselves.”

“Government that works for the majority of the people not just the interests that give them money.”

Inflation

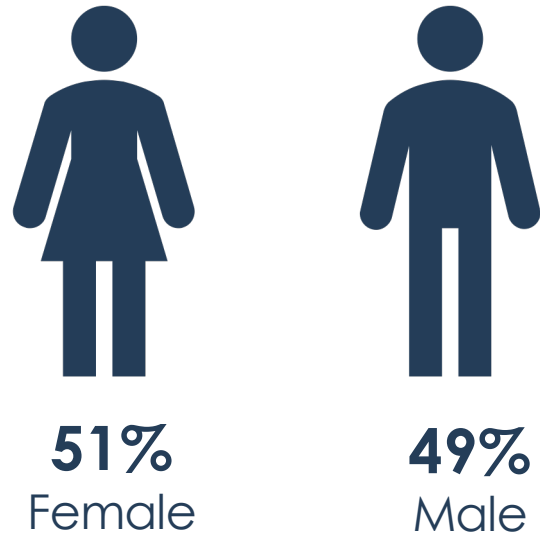
“What would make me more optimistic about the future is an increase in personal finances and a decrease in the cost of everyday items and necessary products and services such as gas, clothing, utilities, and food”

“I would be more optimistic if inflation were to go down.”

“Making sure I am financially stable and have money for my son.”

Respondent Overview

Gender

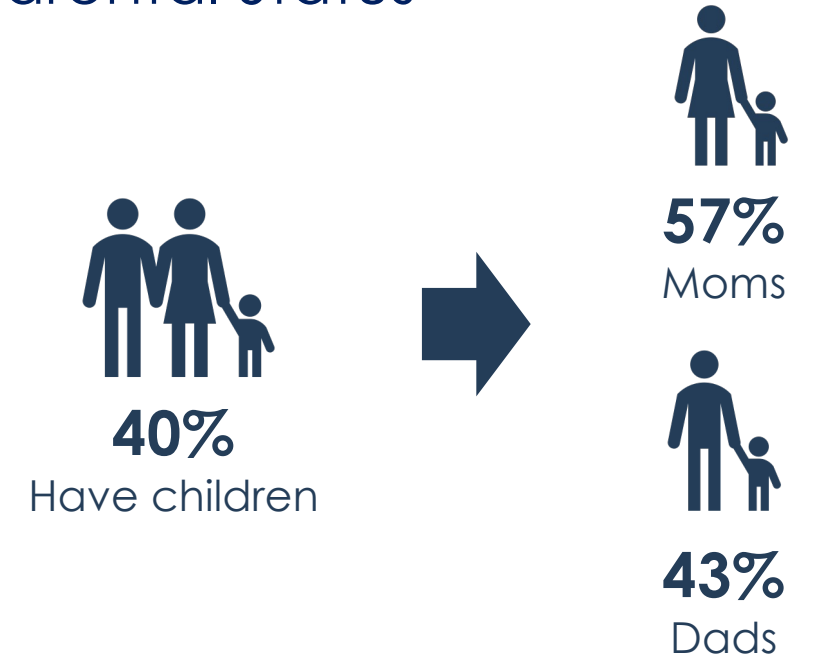


*<1% other identity

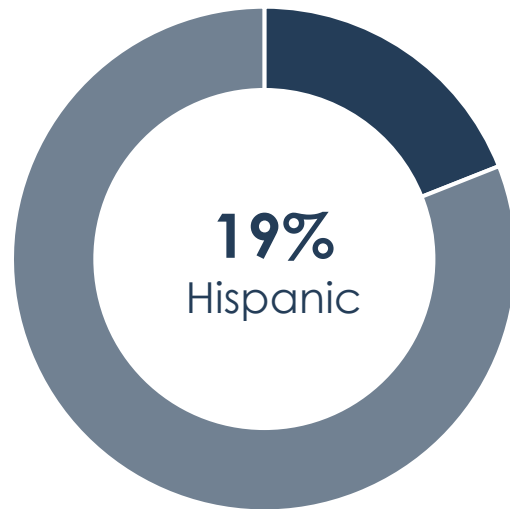
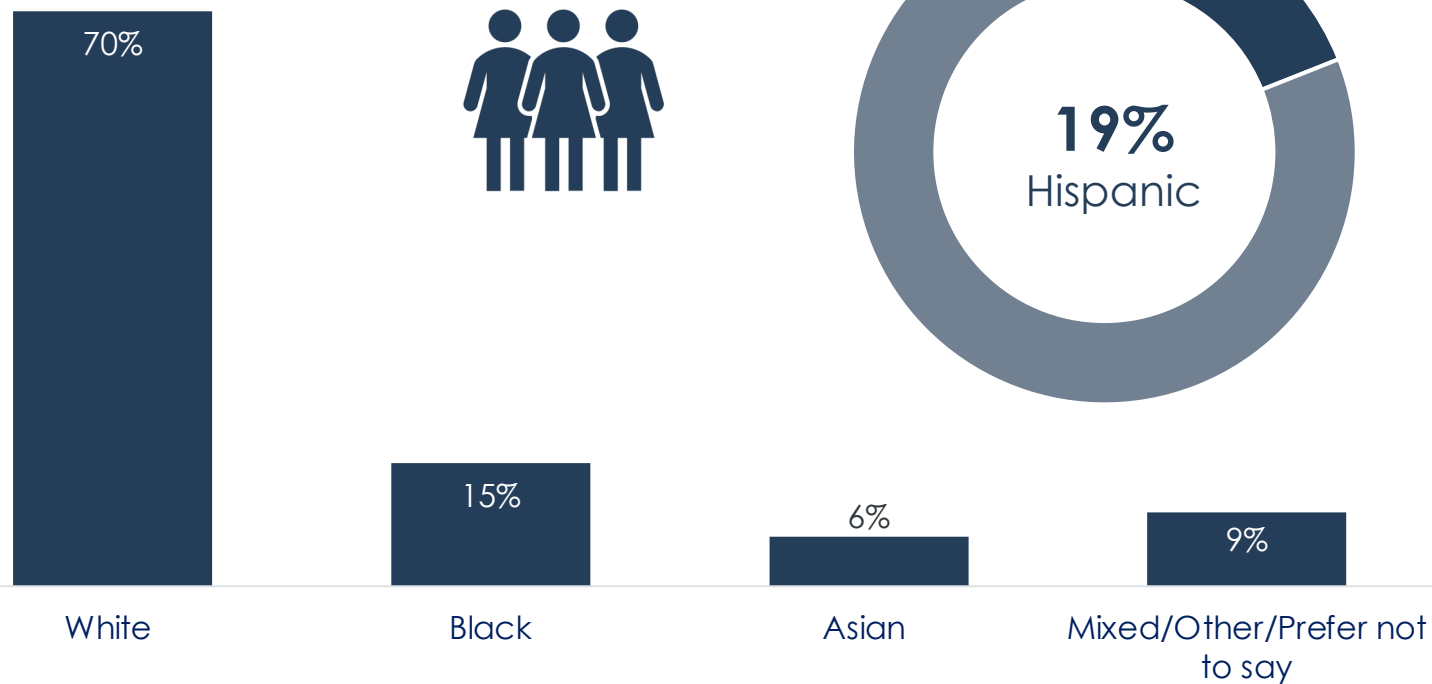
Generation



Parental Status



Ethnicity



Household Income

