



provoked
insights

Fitness Trends
Summer 2024

Background & Objectives

Provoke Insights is a trailblazer in research for branding, advertising, media, and content marketing initiatives. The company conducts a bi-annual study to stay up-to-date with the market trends across multiple industries.

In this comprehensive eighth-wave of the study, Provoke Insights evaluates Americans' sentiment, shopping impulse behaviors, and trust in the media. Continual inflation, layoffs, the presidential election, and the rapid growth of AI have impacted Americans' attitudes, concerns, and spending habits. This wave of research digs deep into the effect of these trends.

Provoke Insights has developed 13 industry-specific decks; this deck focuses on the **fitness industry**.

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 April 2024.

A random stratified sample followed by weighting 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). The sample was modeled to represent the latest US Census data.

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. Significances are indicated by call out boxes in graphs.





Health Priorities

In 2024, Americans will continue to prioritize their physical health, with nearly half expressing concern about maintaining it. This emphasis is especially notable among parents and high-income earners.

Key measures taken to uphold physical well-being include prioritizing a nutritious diet and engaging in regular physical activities like cardio or strength training on a daily or weekly basis. Outdoor activities like running and hiking are also popular hobbies among Americans.

Capturing Opportunity

Despite a slight dip in Fall 2022, fitness gear purchases have maintained a high level, offering a positive outlook for the industry. Affluent Americans and Gen Z are leading the way in these purchases.

While most of the shopping for these items are pre-planned and from their go-to brands, there is still a significant opportunity to capture impulse buyers and attract new customers. The fact that fitness purchasers enjoy browsing through store aisles and are willing to spend to stay updated on the latest trends further underscores this potential.



A photograph of fitness equipment on a blue mat. In the foreground, two red dumbbells are positioned diagonally. Behind them, a red resistance band with black foam handles is coiled. The scene is lit with bright, directional light, creating sharp shadows. A dark grey semi-transparent box is overlaid on the left side of the image, containing the text 'Fitness trends'.

Fitness trends

Groups Significantly More Likely to be Concerned with their Physical Health are.....

Top 2 box on a 5-point scale

41%

Are very concerned about their physical health when thinking about aging



Parents (46%)



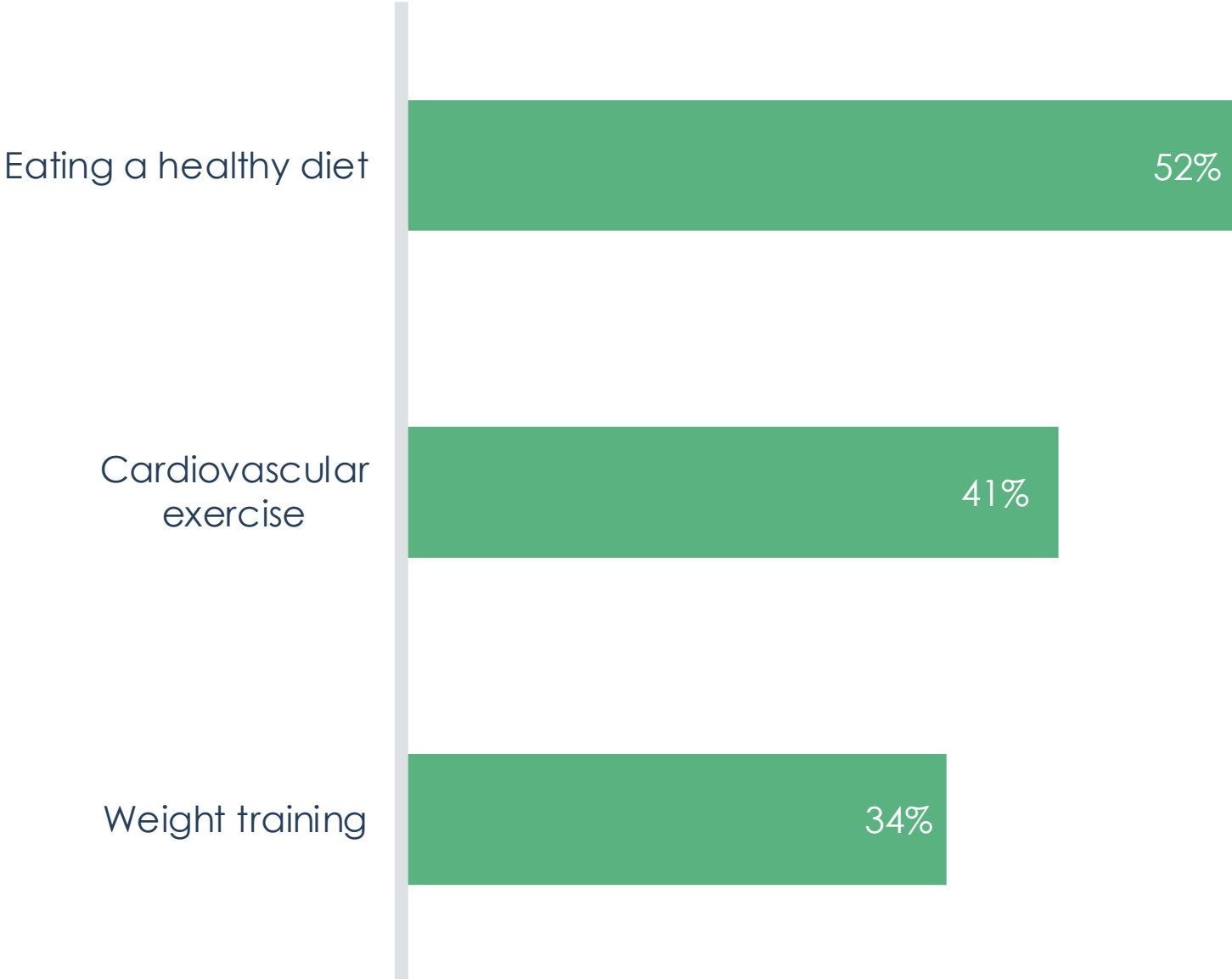
Democrat (46%)



HHI \$150K+ (46%)

Health Routines

Many Americans incorporate healthy habits like diet and exercise into their routine.



Americans Are Very Active

Physically active hobbies like running, gym sessions, and hiking are popular physical activities among Americans.

The most popular physical activities are...



46%

Exercise outside
(e.g., running,
tennis)



29%

Going to
the gym



16%

Hiking



11%

Yoga/Pilates

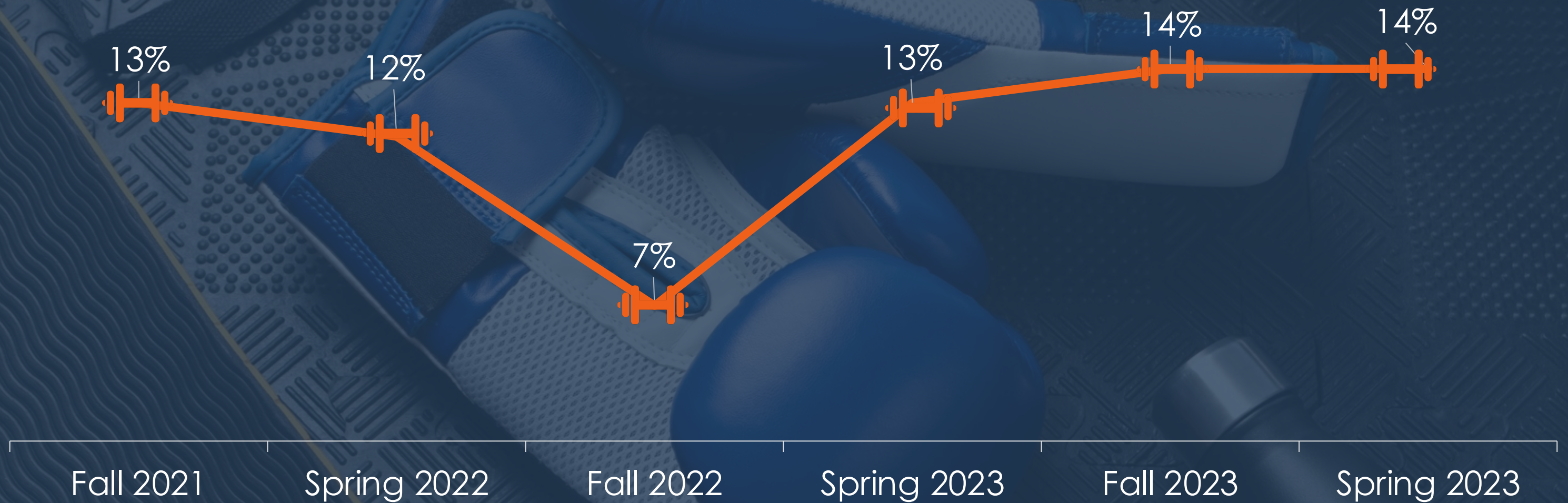


7%

Golf

Seasonal Fitness Gear Purchases

Fitness gear purchases have remained consistent after experiencing a dip in 2022.



Fitness Gear Purchasers

Individuals who are buying fitness items are more likely to be wealthier, Asian, Gen Z, and reside in urban areas. Impulse shoppers have a higher propensity to buy

14%

of Americans purchased fitness gear in the last month

Who is Significantly More Likely to Purchase Fitness Gear

\$ HHI \$150K+ (20%)

 Impulse shop (20%)

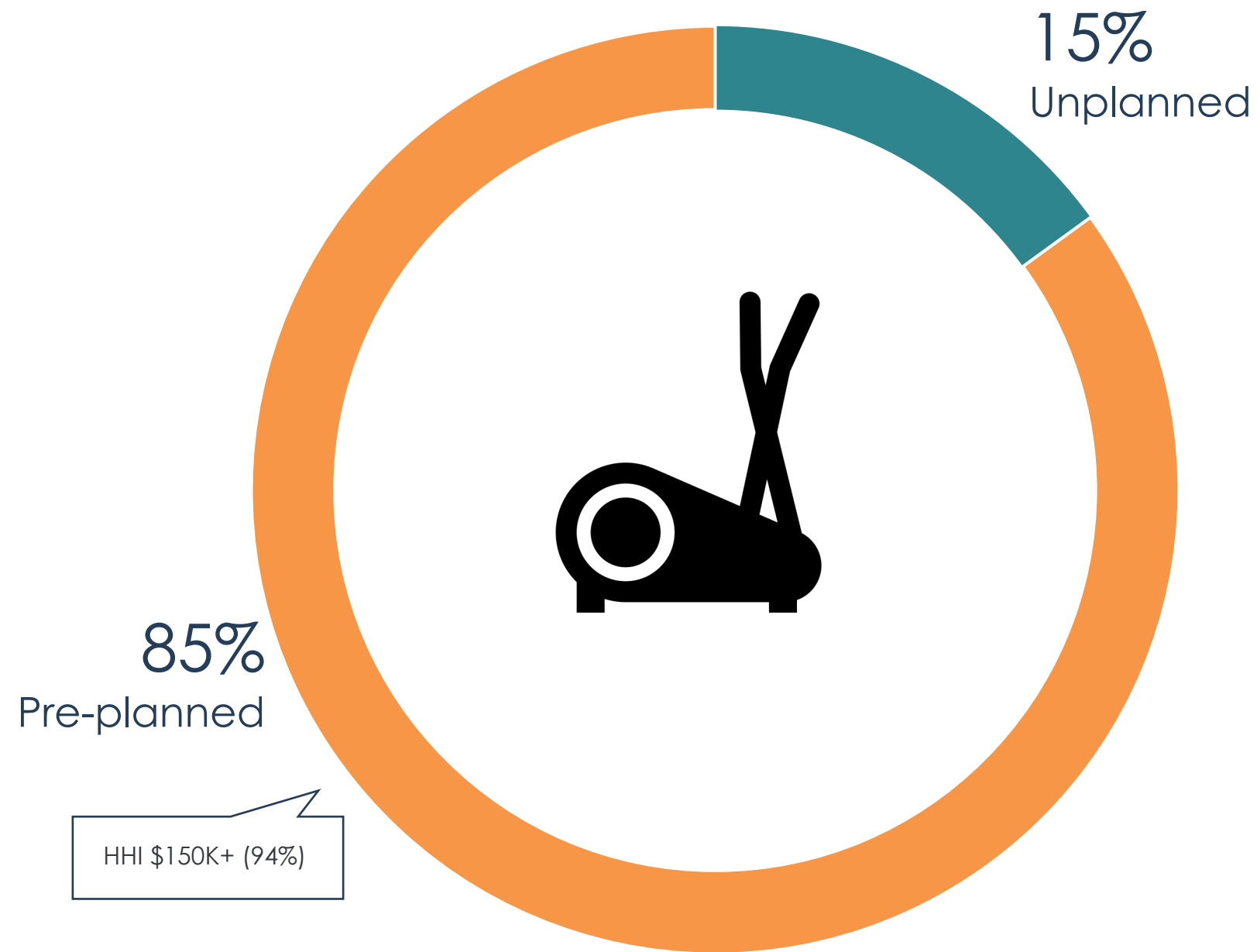
A Asian (20%)

Z Gen Z (19%)

 Urban (19%)

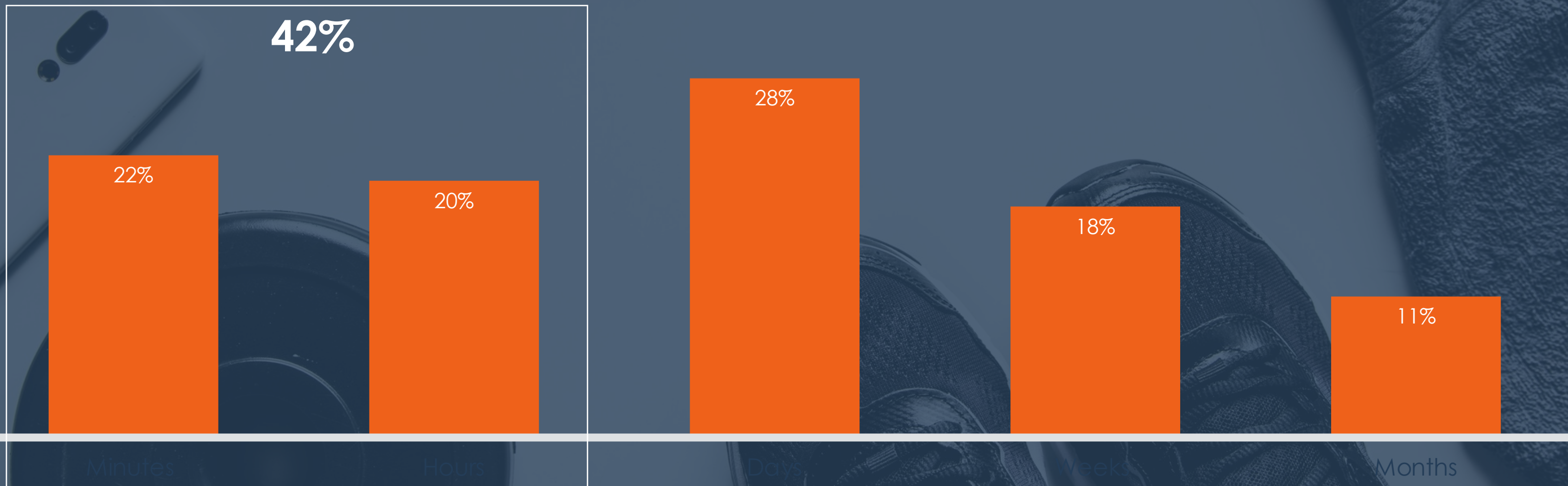
Unplanned vs. Spontaneous

Fitness gear is often a planned purchase.



Time Length of Shopping Decision: Fitness Gear

The decision journey for exercise gear is short, as almost half finalize the decision within hours.



New Brands vs. Tried & True

Over half purchase brands they have bought in the past.

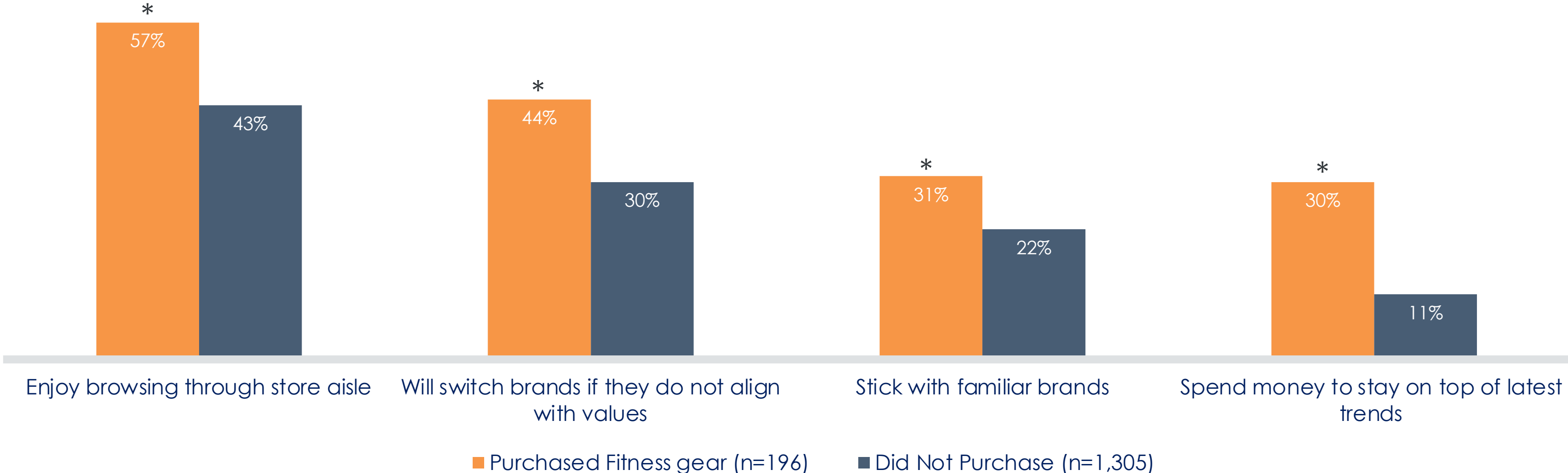
Pre-Planned Fitness Gear Purchases



Fitness Shopper Habits

Fitness shoppers are more loyal to familiar and enjoy browsing through store aisle. They are also more likely to stay on top of the latest trends.

Top 2 on a 7-Point Agree Scale



*indicates significant differences

Relevant Promotional Media Sources For Fitness Gear Shoppers

Television and social media are the most influential media sources for relevant brand promotions or sales.

		Index Percent
Above Average	Television	20%
	TikTok	8%
	Facebook	3%
	Instagram	2%
Average	News publications	0%
	Podcasts	0%
Below Average	Youtube	-1%
	X (formally Twitter)	-1%
	Blogs	-3%
	Reddit	-4%
	Magazines	-4%
	Radio	-5%
	Pinterest	-5%
	Snapchat	-6%
Threads	-7%	

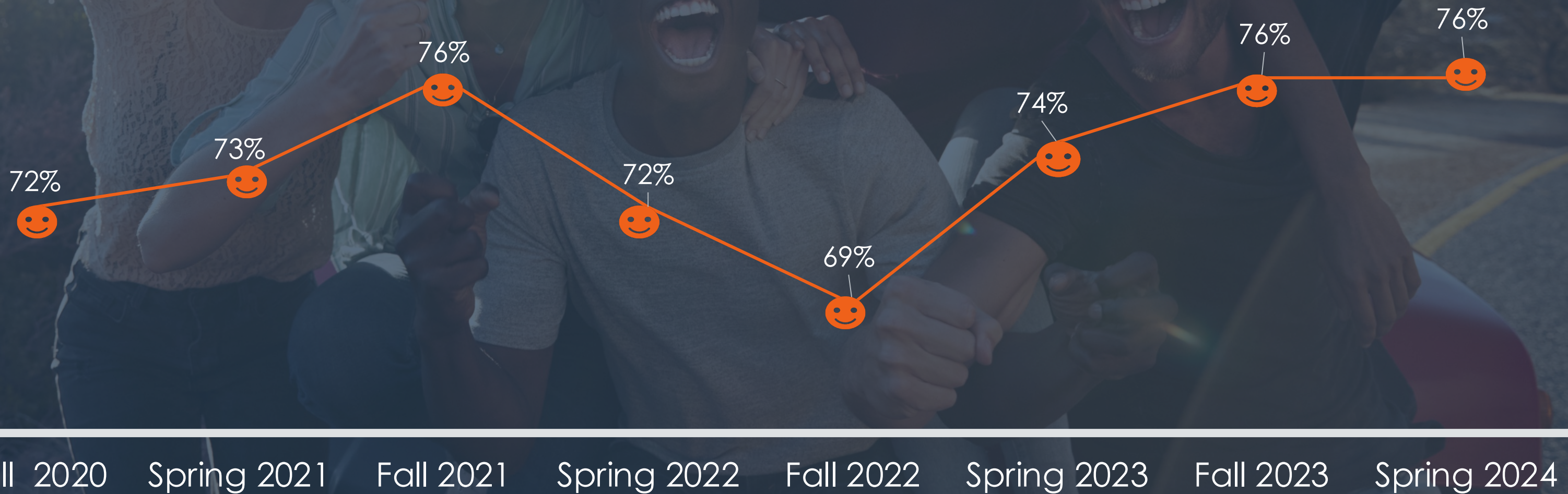


How is the Economy Impacting Consumers?

Consumer Optimism

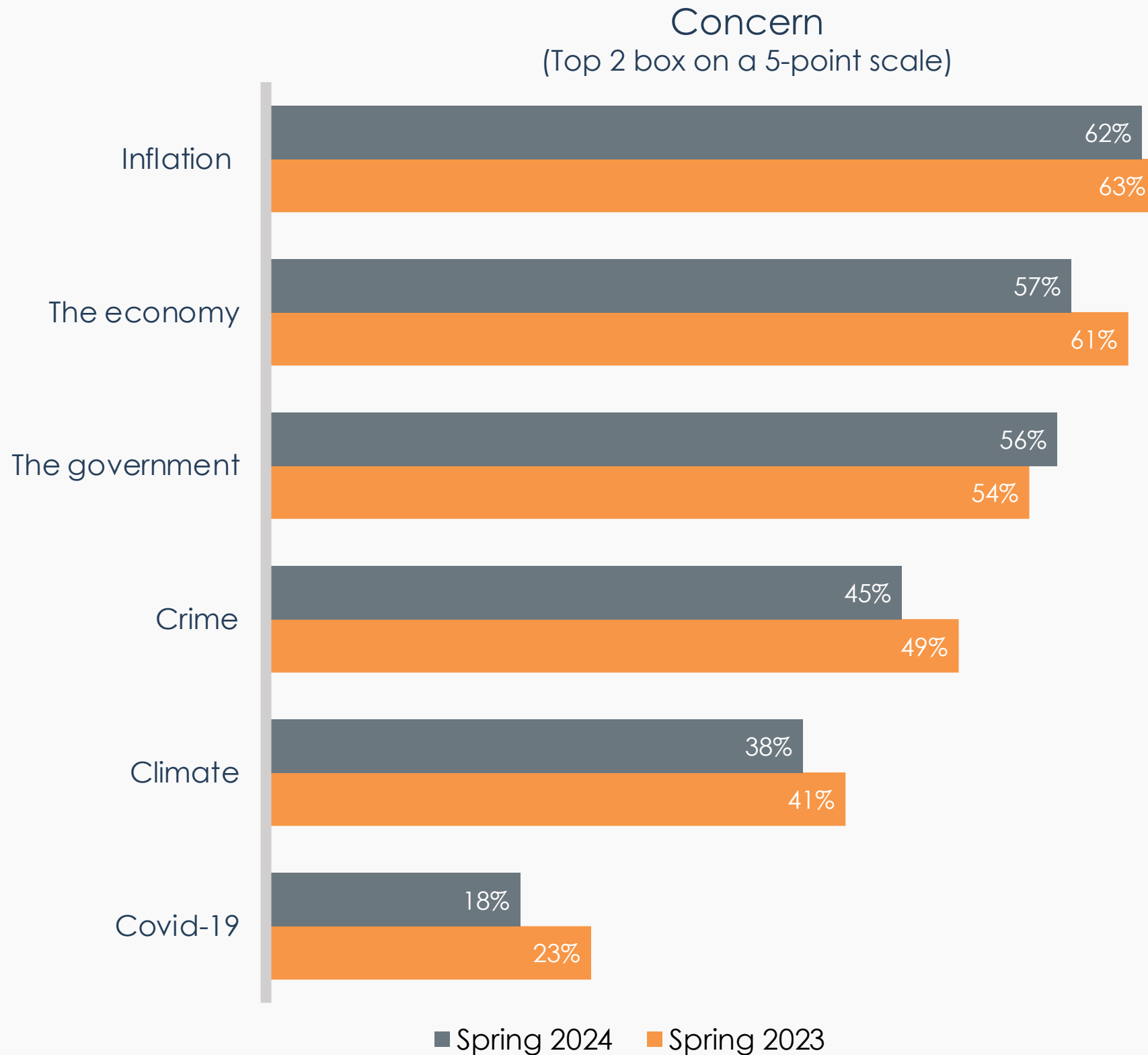
Optimistic outlooks on the future remain high. The lowest sentiment was in Fall 2022.

Optimism
Top 2 box on a 4-point scale




Top Concerns Impacting Consumers


Inflation remains the top concern among Americans. Worries about the government have slightly increased in the last year.




Inflation is a Key Worry for Americans Regarding the Economy

“The prices of everything keeps going up while our jobs aren't paying more to keep up with the cost of living. Eventually only the higher ups will be able to afford a ‘normal’ lifestyle.”

“I am worried about the number of people who live paycheck to paycheck managing the increasing costs for everything. Inflation is making everyday items beyond the means for many.” 

“Everything is so expensive and it's hard to make enough to live and pay for everything you need to. People can't save money or have money for anything extra.” 

“Inflation is very high, and I am worried about a recession and a hit to our portfolio. We are very close to retirement and that makes me nervous.” 

“I'm worried the purchasing power of my salary will go down and I won't be able to afford to never worry about going out to eat or retirement.”

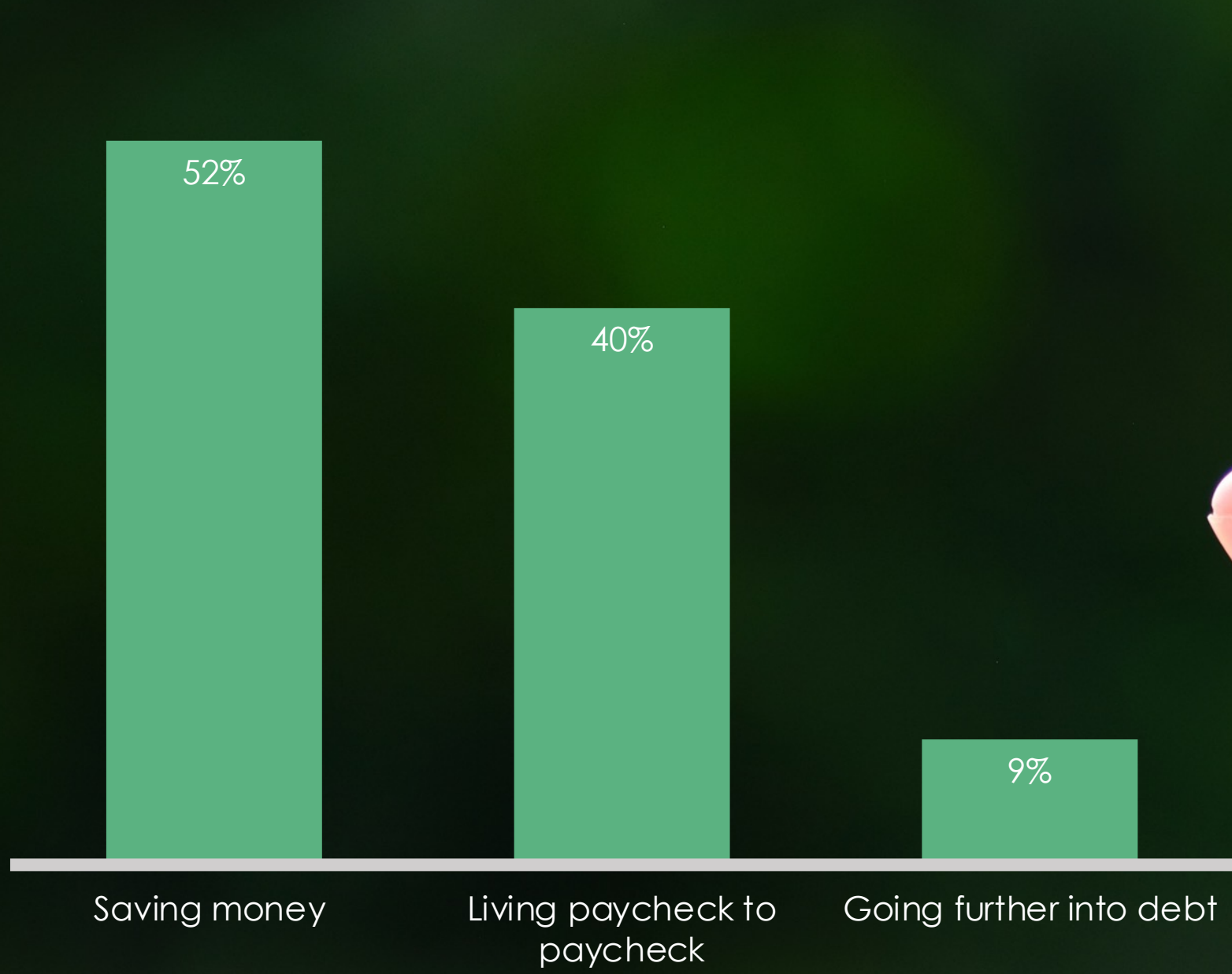
57%

(Top 2 box on a 5-point scale)

of Americans are concerned about the economy

Financial Positions

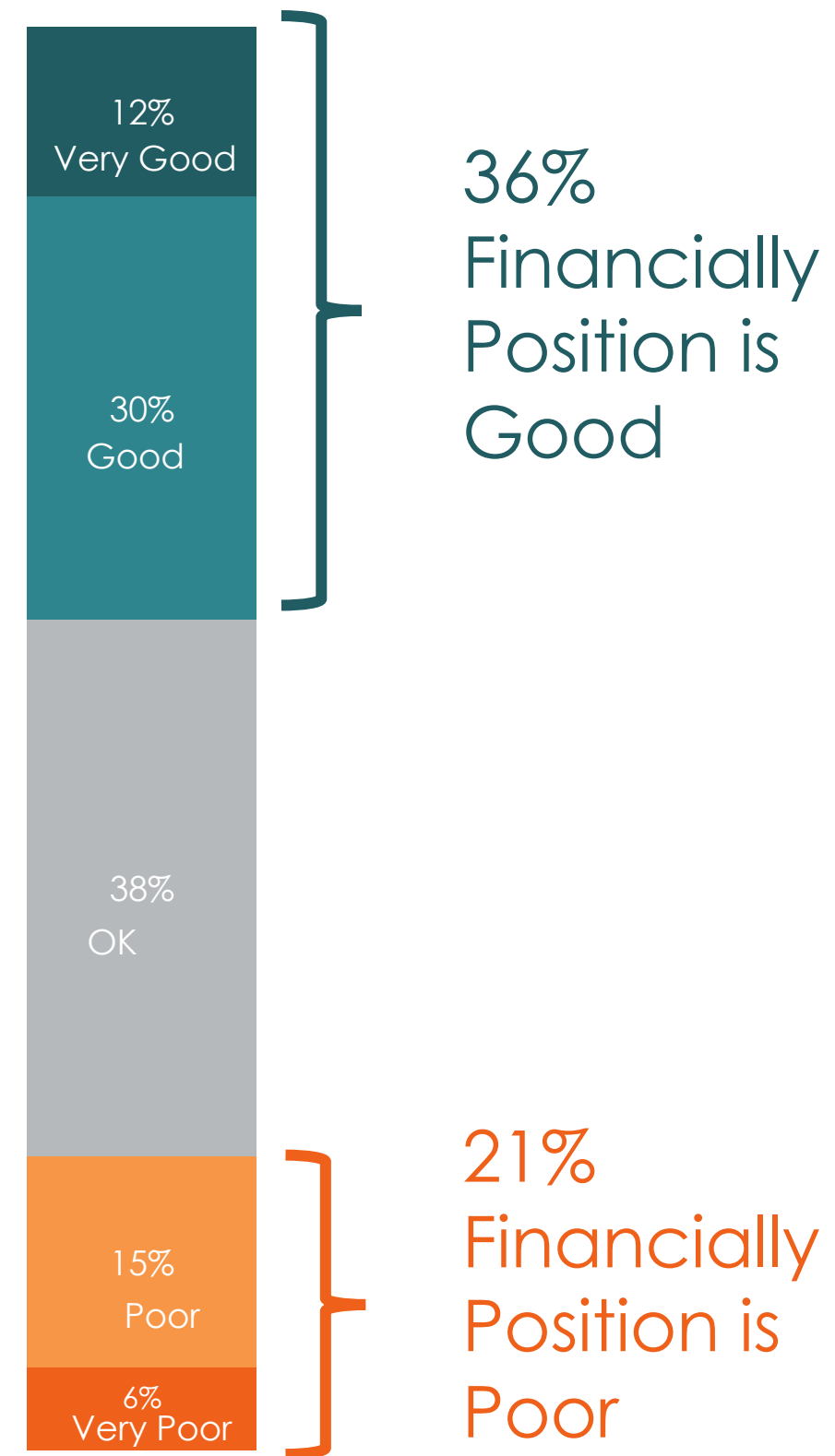
Only half of Americans are saving money. It is particularly concerning as a tenth are going further into debt.





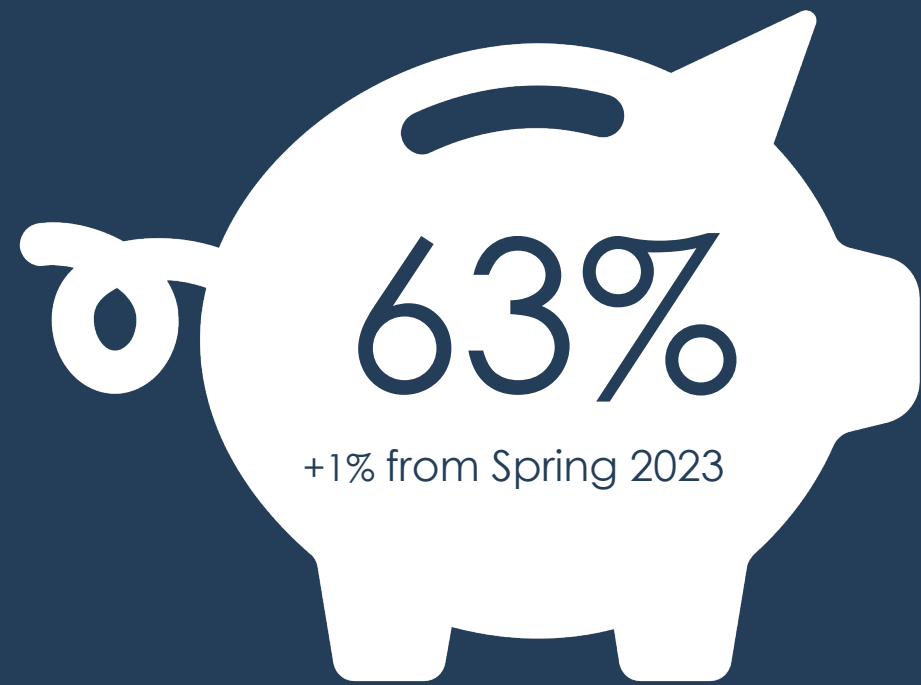
Financial Position Comparison

One-fifth of Americans believe that they are in a bad financial situation.



Americans Are Budget Conscious

Two-thirds of consumers continue to reduce their spending.



More Budget Conscious

Who is Significantly More Likely to Be Budget Conscious

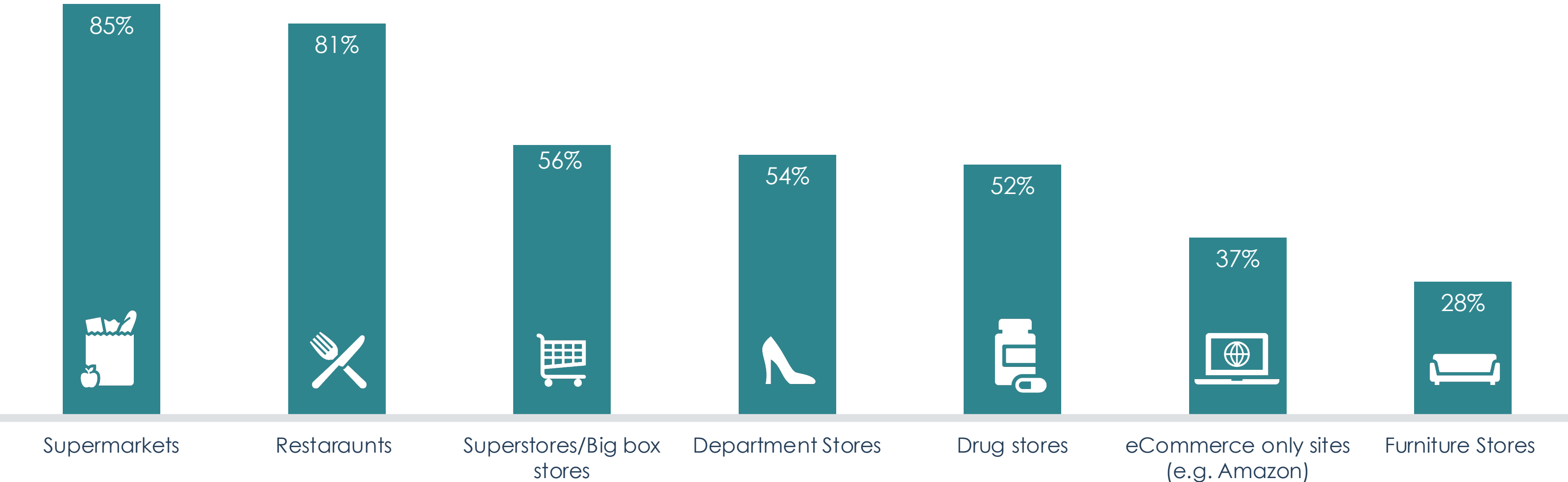
 77% Going Into Debt

H 71% Hispanic

 68% Republican

Inflation Impact Across Different Types of Stores

Prices have surged the most at food establishments such as supermarkets and restaurants.



Respondent Profile

Gender



49%
Female

50%
Male

*<1% other identity

Generation

42 years old
Median Age

Z 13% Gen Z

X 32% Gen X

M 38% Millennials

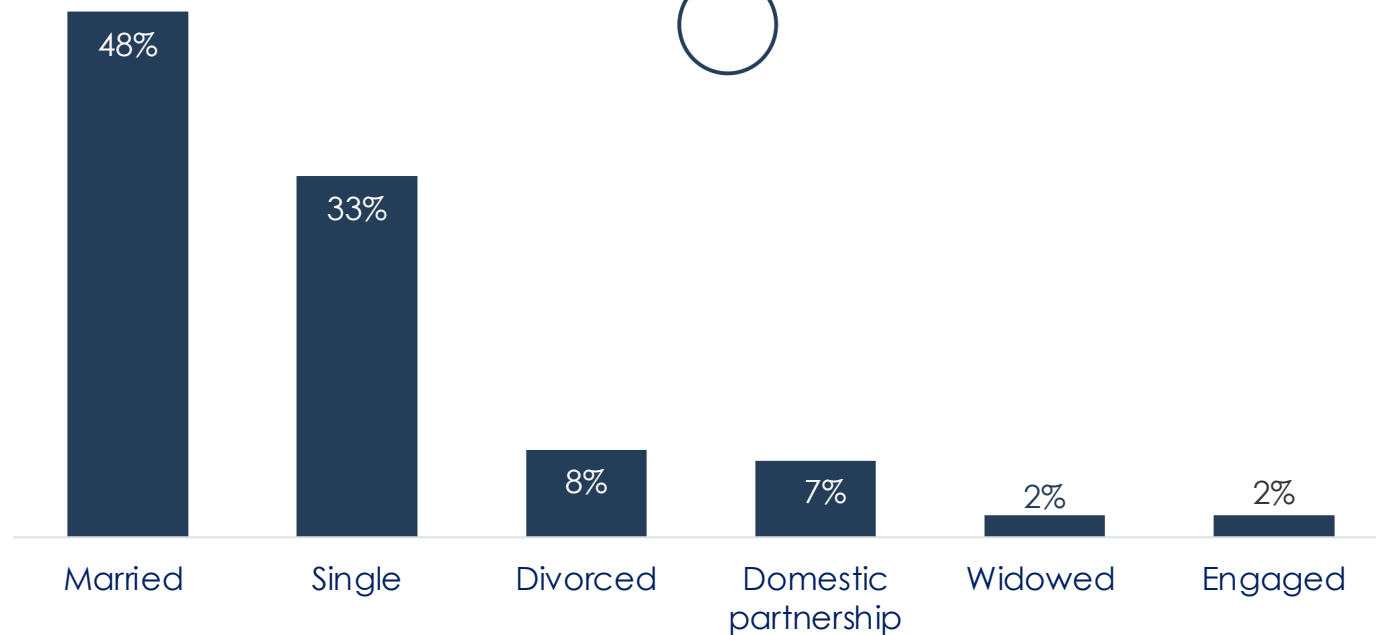
B 17% Baby Boomers

Parental Status

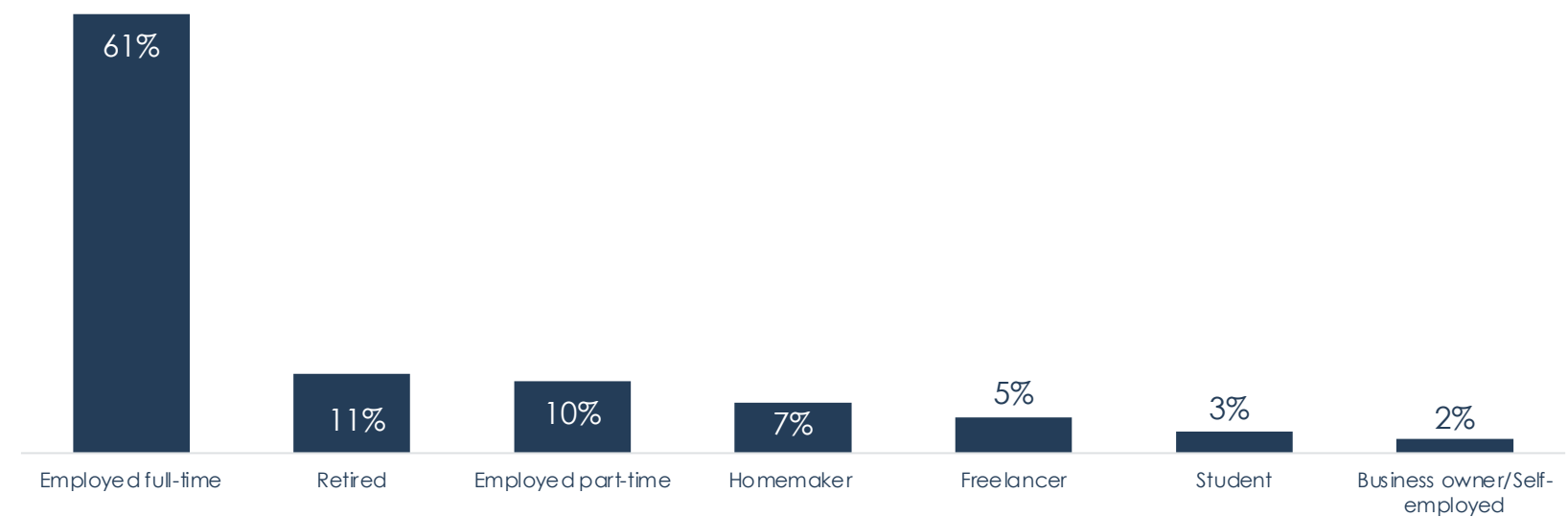


39%
Have children

Marriage Status

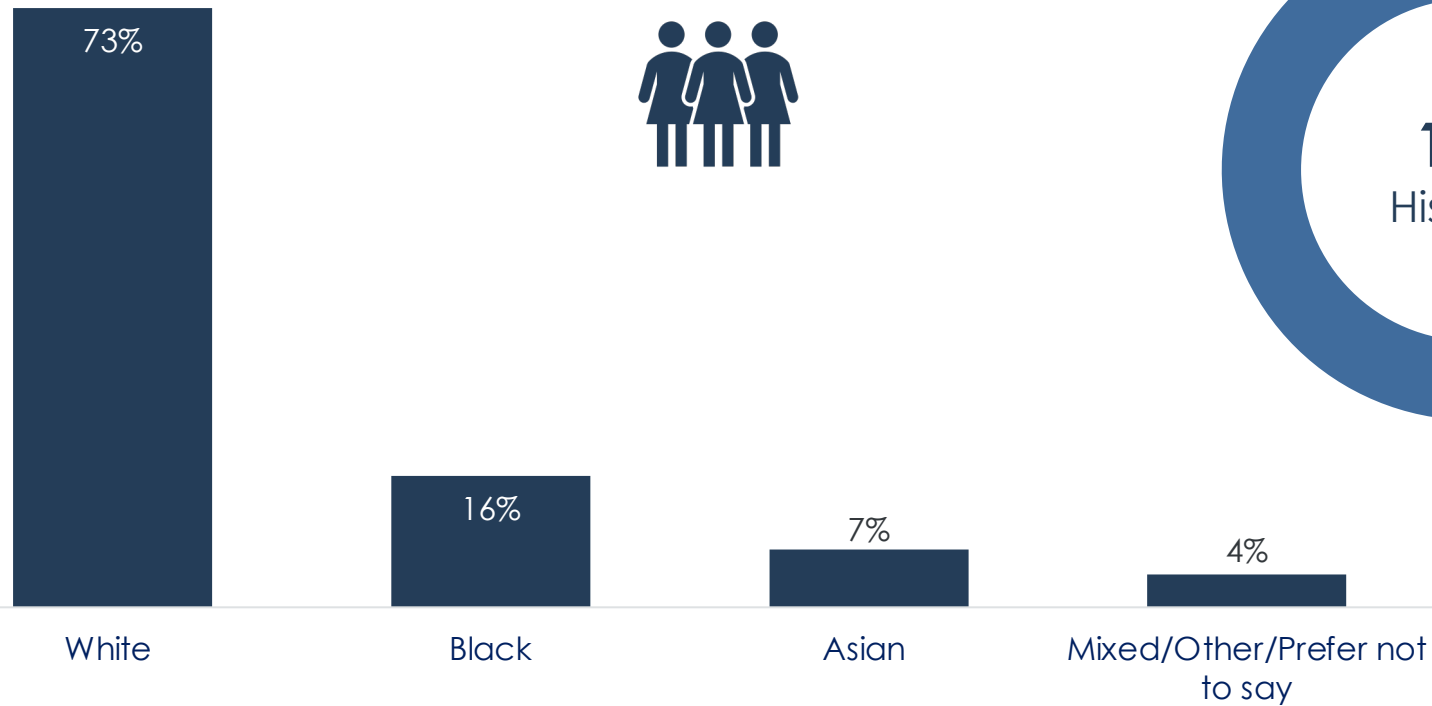
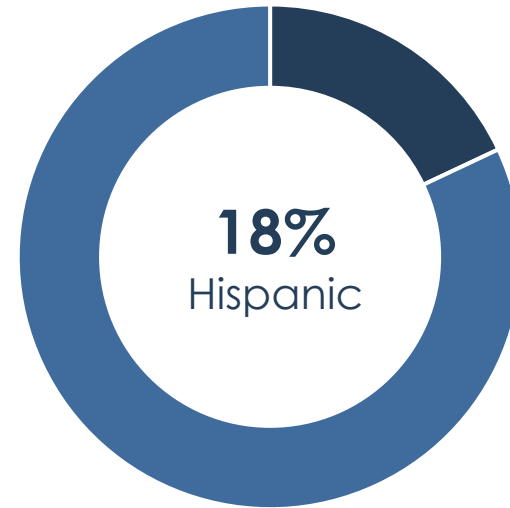


Employment Status




Respondent Profile


Ethnicity



Political Party

37% 
Democrat

26% I
Independent

30% 
Republican

*7% Prefer not to say/Other

Area



26%
Rural

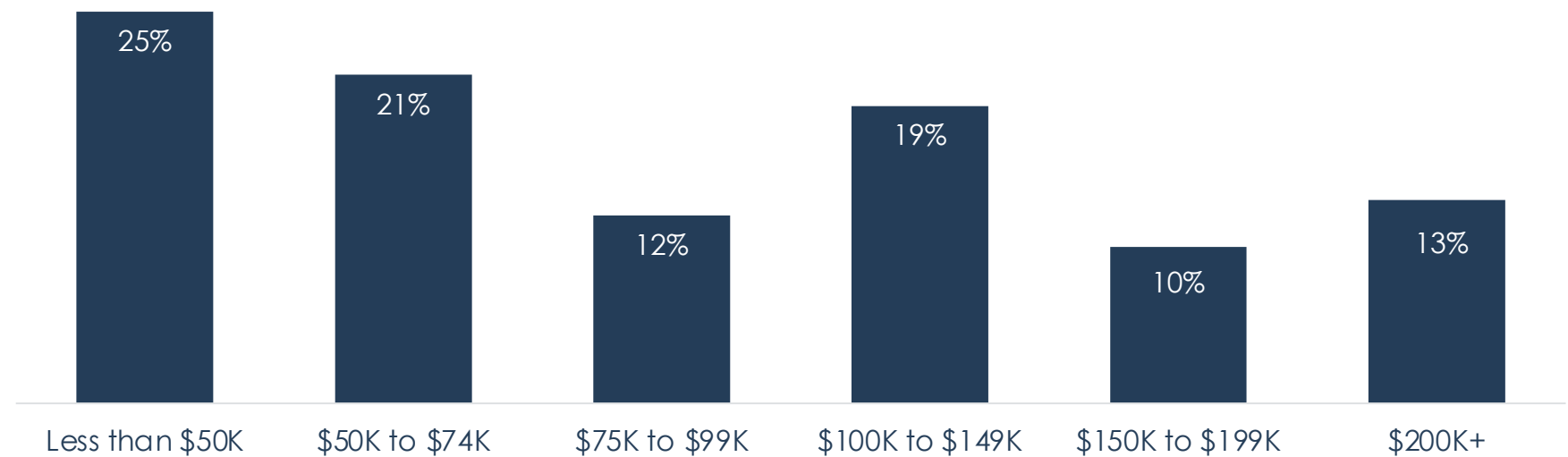


49%
Suburban



25%
Urban

Household Income



About Provoke Insights

Provoke Insights is a full-service market research firm founded on the belief that research should better align with marketers' needs. Our mission is to empower brands by providing them with the insights they need to navigate today's ever-changing marketing landscape.

Unlike traditional market research firms, we take a more agile and innovative approach to our work. Our team is dedicated to developing initiatives that are designed to address the unique and evolving needs of today's market quickly and effectively.

What sets Provoke Insights apart from other research firms is our singular focus on branding and advertising initiatives. Our team consists of seasoned researchers who are also experienced brand and media strategists. With this expertise, we deliver actionable insights that help brands succeed in their marketing efforts.

For more information or press inquiries, reach out to info@provokeinsights.com.

