THE IMPACT OF COVID-19 IN THE FITNESS AND WELLNESS UNIVERSE
INTRODUCTION

We've been studying how COVID-19 will continue to impact the fitness universe. We’re looking beyond the "fitness industry" to the entire ecosystem of companies, franchises, professionals, athletes, sports lovers, gyms and studios affected by various lifestyle habits, protocols and, now more than ever, government guidelines.

This report presents some data that could be helpful in understanding this complex situation. Even though we're facing a high level of uncertainty, we are able to see some trends that speak to the lifetime value of fitness and online workout options developed in response to the pandemic. We hope that by mapping the main barriers and behaviors of customers around the world, we can provide guidance for the entire ecosystem.
Extra information about the respondents:

- People with full time jobs
- 44.36% male and 54.48% female
- 42% 36-55 years, 29% 25-35 years and 29% +55 years.

<table>
<thead>
<tr>
<th>Answers per country</th>
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</thead>
<tbody>
<tr>
<td>Brazil</td>
<td>1000</td>
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<tr>
<td>México</td>
<td>1000</td>
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<tr>
<td>Chile</td>
<td>1000</td>
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<tr>
<td>Argentina</td>
<td>1000</td>
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<tr>
<td>Spain</td>
<td>1000</td>
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<tr>
<td>UK</td>
<td>1000</td>
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<tr>
<td>DE</td>
<td>1000</td>
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<tr>
<td>IT</td>
<td>1000</td>
</tr>
<tr>
<td>US</td>
<td>1000</td>
</tr>
<tr>
<td><strong>Total answers</strong></td>
<td><strong>9000</strong></td>
</tr>
<tr>
<td><strong>Data with 97% level of trust</strong></td>
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While many have tried virtual workouts, many still prefer offline workouts, as 40% say they do not get the same results and consistency from working out online.

Users’ profiles played a large part in what they expect from their workout experience. This means that those previous physical activity habits impact their willingness to try online and offline fitness options post-covid19 scenario.
Flexibility in life demands flexibility in fitness routines: as travel, work from home, and countryside residents increase, people need more flexible wellbeing routines. 45% of employers are planning to keep home-office somehow and wellness is important for 77.4% of people’s productivity.

Autonomy to work out is the main behavior that will remain after COVID-19 — people now have higher expectations for fitness products, since 49.12% are on an active routine without a traditional gym membership (15.62% are doing it outdoors, 11.76% are doing it online, 21.74% are coming from offline ways of workout to online ways).
#5

Complex journeys demand guidance: products should guide users through their fitness routines and goals via a seamless user experience and assertive marketing, as 17.58% are demanding an hybrid fit of online and offline ways of work out.

#6

Fitness facilities need to think beyond brick and mortar to a more omnichannel approach, since 16% of people are not planning to return in-person and a 12% of newly active people are utilizing online fitness methods. Remote work may also affect in-person attendance as mobility in general will be impacted by this trend.
We will see the demand for **outdoor activities** increasing more than ever. 15% of people said they are exercising outdoors and 16% want to keep this habit even after pandemic.

Activities that require structure or equipment, such as weight training and swimming, are decreasing while activities focused on holistic health and wellbeing with little need for equipment are increasing.
The number of people who tried online workouts grew 36% because of the pandemic, with YouTube being the preferred platform (42%).

Moving forward, wellness will be incredibly important for health and productivity!

94% of people think their wellness routines are somewhat to very important for their productivity at work. 77% of people think that it’s somewhat to very important that their employer provide affordable wellness options. BUT the number of companies that helped with wellness during the lockdown was only 34%.
Most people had an existing relationship to physical activity pre-covid.

With the exception of the nearly 18% of respondents who said they were inactive pre-covid, 56% of respondents had a regular fitness routine and 26% were planning on starting one.
The number of people that tried online workouts grew around 36% because of the pandemic.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>42.06%</td>
</tr>
<tr>
<td>Fitness and wellness apps</td>
<td>19.56%</td>
</tr>
<tr>
<td>Instagram</td>
<td>15.41%</td>
</tr>
<tr>
<td>Gym’s apps</td>
<td>7.90%</td>
</tr>
<tr>
<td>Live classes via other platforms</td>
<td>7.80%</td>
</tr>
<tr>
<td>Mirror</td>
<td>2.84%</td>
</tr>
<tr>
<td>Peloton</td>
<td>2.79%</td>
</tr>
<tr>
<td>Other</td>
<td>1.65%</td>
</tr>
</tbody>
</table>
Fit with offline ways to workout

- **20.54%**
  I can’t wait to go back to my gym soon as I’m allowed to / Already got back!

- **24.17%**
  I can’t wait to go back to my gym but I will wait until the coronavirus risk is gone (i.e. the vaccine is ready)

Hybrid Fit

- **21.56%**
  I honestly don’t know how my workout routine will change once things go back to normal

- **17.68%**
  I’m excited to combine online and offline ways of working out!

Fit with online ways to workout

- **16.04%**
  I will keep my workout routine online and don’t plan on returning to the gym, even after things go back to normal.

(Select the option that best describes you at this moment:)
(Select the option that best describes you at this moment:)

- I can’t wait to go back to my gym soon as I’m allowed to! / Already got back!
- I can’t wait to go back to my gym! But I will wait until the coronavirus risk is gone (ie. the vaccine is ready)
- I’ll keep my workout routine online and don’t plan on returning to the gym, even after things go back to normal.
- I’m excited to combine online and offline ways of working out!
- I honestly don’t know how my workout routine will change once things go back to normal

BR
US
UK
IT
DE
SP
MX
AR
CL
We saw different ways of working out during the lockdown and this behavior will impact the expectation with the gyms reopening.

More expectation with the reopening

Less expectation with the reopening
I couldn't work out at home without the appropriate equipment and structure.

Working out online works some days and some days it doesn't. I keep trying even without consistency!

I just put everything on-hold, I'm not thinking about exercising now.

I'm an outdoor lover, I'm exercising in open spaces and I will keep doing that.

I discovered that I can keep consistency with my online workouts during the lockdown!

I discovered using the online methods the possibility for me to workout.
Considering only the lockdown period, which of these descriptions fits you best?

- I couldn’t workout at home without the appropriate equipment and structure.
- Working out online works someday and some days it doesn’t, but I keep trying even without consistency.
- I discovered that I can keep consistency with my online workouts during the pandemic!
- I just put everything on-hold, I’m not thinking about exercising right now.
- I discovered, using online methods the possibility for me to workout.
- I’m an outdoor lover, I’m exercising in open spaces and I will keep doing that.
37.3% of people considered a gym that follows covid-19 protocols a safe environment, but most of people are waiting for the vaccine.

What do you consider to be a safe environment to go back to a gym or studio in person?

- **37.6%**: Only with the vaccine for Covid-19
- **37.3%**: If a gym follows the safety protocols
- **17.1%**: Only with a treatment for Covid-19
- **7.9%**: Whenever the gyms reopen again, no matter what
What do you consider to be a safe environment to go back to a gym or studio in person?

- Social distancing: 21.7%
- High standard of hygiene: 20%
- Hand sanitizer: 19.3%
- Capacity control: 15.7%
- Members must wear a face mask: 14.9%
- Members must wear gloves: 8.2%
Activities that demand structure or equipment are decreasing as activities that focus on holistic health and that do not require equipment are increasing.

### Activities practiced before lockdown period vs. during the lockdown period

<table>
<thead>
<tr>
<th>Activity</th>
<th>Before Lockdown</th>
<th>During Lockdown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight training</td>
<td>16.3%</td>
<td>15.7%</td>
</tr>
<tr>
<td>Cardio and functional</td>
<td>16%</td>
<td>14.4%</td>
</tr>
<tr>
<td>(individual equipment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cardio and functional classes</td>
<td>11%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Yoga/Pilates</td>
<td>10.4%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Crossfit</td>
<td>5.3%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Dancing</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Swimming</td>
<td>8.5%</td>
<td>5%</td>
</tr>
<tr>
<td>Running</td>
<td>15.5%</td>
<td>15%</td>
</tr>
<tr>
<td>Boxing, Muay Thai and similars</td>
<td>3.4%</td>
<td>2.9%</td>
</tr>
<tr>
<td>None of them</td>
<td>3.2%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>
It's possible to extrapolate which fitness offerings will continue to be available post lockdown by comparing current and future interest.
The home-office is a thing to stay! Almost 45% will be practicing home office somehow after COVID-19 crisis.

Roughly 34% of people are already back in their workplaces, having either never worked from home or having already returned.

Is your company planning to keep home-office or remote work even after the COVID-19 crisis?

- Yes, during some days of the week: 19.9%
- Yes, fully remote work: 10.9%
- Yes, with a flexible policy: 14.1%
- No, we already returned to the office: 12.3%
- No, we’ll back when it’s safe: 8.9%
- I never worked remotely: 21.8%
- I don’t know: 12%

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35% of people feel that their employer has not helped with their wellness during the pandemic.

For companies offering wellness support, information on how to stay healthy is the main type of support provided.

How has your employing company helped you with your wellness during the lockdown? (Select all that apply)

- They have not helped with my wellness during lockdown 34%
- They have subsidized digital fitness options 9%
- They have subsidized mental health options 12%
- They have subsidized nutrition options 8%
- They have organized online workouts 9%
- They have provided information on how to stay healthy 18%
- They provide Gympass 3%
- Other 8%
Working from home and the overall stress of the pandemic contributes to 34% of people having less work/life balance than before.

How do you feel like your work/life balance has been affected by COVID?

- 34%: I have less work/life balance :(  
- 47%: My work/life balance has stayed the same :|  
- 19%: I have more work/life balance :)}
69% of people consider their wellness routine to be an important aspect of their productivity at work

How important do you think your wellness routine is for your productivity with work?

- Not important: 5%
- Somewhat important: 26%
- Very important: 69%
77% of people consider it somewhat or very important for employers to provide affordable wellness options

How important is it for your company/employer to provide affordable wellness options?

- Not important: 23%
- Somewhat important: 31%
- Very important: 46%
THANK YOU

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