

# 2011 IDEA Fitness Programs & Equipment Trends



## How to Read the Numbers

The **percentage (%)** reflects the number of survey respondents who answered yes to a given survey question. All percentages have been rounded up at 0.5 and down at 0.4. Percentages do not necessarily total 100, because of multiple or missing responses.

The **mean**, or **average**, is all of the answers added together and then divided by the number of respondents. An average can be influenced by extremely high and extremely low numbers. In some cases, the extremely high and extremely low responses were eliminated to present a more accurate number.

The **median** is the midpoint, meaning that half of the respondents answered above and half answered below. A median is useful because, unlike an average, it is not influenced by high and low extremes.

## Methodology

In February and March 2011, four e-mails were sent to IDEA business and program director members who gave IDEA permission to contact them. Respondents linked to a Web-based survey. There were 148 completed questionnaires from the United States and Canada, for a 10% response rate. At a 95% confidence level, the margin of error is  $\pm 5\%$ .

## Survey Respondents

The demographics of the businesses where the respondents work.

- According to industry definitions, “multipurpose” health clubs have fitness facilities and racquet courts. “Fitness-only” health clubs have fitness (group exercise and/or a fitness center with equipment), but no racquet courts. Either type of club may have a swimming pool or a gymnasium.
- Respondents were 53% owners, 10% general managers, 28% fitness directors, 3% personal training directors and 7% group fitness directors/coordinators.

### GEOGRAPHIC REGION

West USA	40%
South USA	24
Northeast USA	19
North Central USA	17
Canada	4

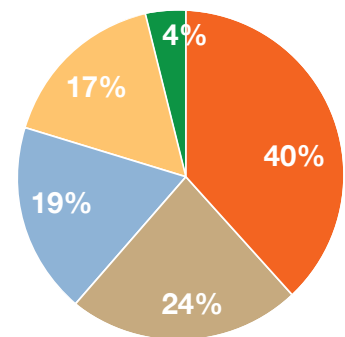
### LOCATION OF BUSINESS

Small city or town	39%
Large city	37
Suburb	17
Rural area	7

### TYPE OF BUSINESS

Yoga or Pilates studio	14%
Fitness-only health club	13
Multipurpose health club	12
Personal training gym	12
College/university	10
Personal training in clients' homes	7
Group exercise studio	6
YMCA/YWCA/JCC	6
Corporate fitness center	5
Hospital fitness center	5
No facility, satellite classes	5
Parks or recreation program	5
Personal training in trainer's home	2

### Geographic Region



### NUMBER OF MEMBERS/CLIENTS

Mean	5,510 members/clients
Median	450 members/clients

Under 300	45%
300–1,499	19
1,500–3,499	8
3,500 and above	28

### APPROXIMATE SQUARE FOOTAGE OF FACILITY

Mean	25,087 square feet
Median	3,500 square feet

Under 2,500	35%
2,500–9,999	26
10,000–31,999	17
32,000 and above	21 >>

## Customer Profile

How owners and managers describe their clients.

- Percentages in this section are likely the respondents' estimates or observations. Respondents may not have had reference data.
- Owing to respondents' estimations or to rounding, the estimated percentages do not equal 100%.

### AVERAGE FITNESS EXPERIENCE OF CLIENTS

Beginners	36%
Intermediate	46
Advanced	20

### AVERAGE AGE OF MEMBERS/CLIENTS

Under 18 years	8%
18–34	20
35–44	21
45–54	23
55–64	20
65 or older	17

### CATEGORIES OF MEMBERS/CLIENTS

Apparently healthy adults	97%
Older adults	89
Those with chronic or temporary injuries	83
Those with special medical needs (e.g., diabetes, arthritis, obesity)	80
Amateur athletes	66
Those with physical disabilities	62
Children and teens (aged 18 or younger)	55
Professional athletes	20
Women only	19

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## Program Profile

How owners and managers describe their businesses and programs.

### BUSINESS FACTS

- 40% have a swimming pool available for fitness classes.
- 44% sell products or have a pro shop.
- 30% charge dues plus a separate fee for some classes or programs.
- 74% ask clients to pay for individual sessions/classes or packages of sessions/classes.
- 33% ask clients to pay monthly dues that include all programs.
- 25% ask clients to pay annual membership dues that include all programs.

### WEEKLY PROGRAM SCHEDULE

Number of sessions conducted and number of classes scheduled per week.

	Mean	Median
Personal training sessions	103	35
Group exercise classes	43	23
Pilates classes	9	5
Yoga classes	9	6

### WEEKLY NUMBER OF PERSONAL TRAINING SESSIONS

Counting all the trainers, how many personal training sessions do you conduct in an average week?

	Median
1–9 sessions	14%
10–19	14
20–29	12
30–49	19
50 or more	41

### NUMBER OF PERSONAL TRAINERS

How many personal trainers conduct sessions in an average week?

	Mean	Median
Number of personal trainers	7	3

### AVERAGE CLASS PARTICIPATION

How many people attend an average group fitness class or an average yoga or Pilates class?

	Group Exercise	Pilates	Yoga
Mean	35	15	19
Median	15	14	15
1–9 participants	34%	38%	27%
10–19	35	32	32
20–29	16	17	25
30–49	10	10	7
50 or more	6	3	9

### AVERAGE LENGTH OF CLASSES AND SESSIONS

How much time do you schedule for these activities?

	30 minutes	45 minutes	60 minutes	90 minutes
Personal training sessions	47%	24%	74%	4%
Group exercise classes	24	38	87	5
Pilates classes	5	9	80	1
Yoga classes	3	13	73	18



## Programs and Activities

- For the 16th year in a row, personal training is the top-ranked program within the facilities (86%) that offer the format.
- 84% of facilities offer group exercise classes. Of those, dance and branded choreography classes have grown the most, while boxing/kickboxing, step aerobics and martial arts-based aerobics have declined the most.
- The greatest program growth over the years is in small-group personal training. Among these are partner training, 3–5 clients share and indoor boot camp classes.
- Of the facilities that offer mind-body programming (62%), 88% offer Pilates.
- The term *combined* means that sub-categories have been added together. “Personal training, combined” includes one-on-one, 2 clients share and small-group. “Strength training, group, combined” includes no music, background music and choreographed to music. “Aerobics, combined” includes high-, low- and mixed-impact.
- Personal training, group exercise and mind-body program percentages are based only upon those facilities that offer the programming. For example, 86% of facilities said they offer the category of personal training. Of those 86%, 99% reported offering personal training, combined; 99% reported offering personal training adult, one-on-one; and 93% reported offering personal training, 2 clients share. Statistics in this chart were also reported in this manner for group exercise and mind-body.

## MOST FREQUENTLY OFFERED PROGRAMS AND ACTIVITIES

Do you offer the program?	% of all respondents
Personal training, combined	99%
Personal training, adult, one-on-one	99
Personal training, 2 clients share	93
Pilates	88
Fitness assessment	84
Strength training, one-on-one	83
Yoga	82
Core-conditioning classes	78
Personal training, 3–5 clients share	78
Strength training, group, combined	78
Stretching and/or flexibility	77
Circuit classes	75
Circuit training, small-group	72
Abdominals workouts	71
Community outreach programs	70
Functional resistance training	70
Personal training, youth, aged 18 or younger, one-on-one	68
Strength training, group, with background music	68
Aerobics, combined	68
Boot camp classes, indoor	66
Dance (e.g., urban street, funk, hip-hop)	64
Cycling-based classes, indoor	64
Clinics on special topics	62
Cardiorespiratory interval training	62
Pilates or yoga training, one-on-one	61
Health fairs	59
Boot camps, small-group	59
Step aerobics	58
Sport-specific training	58
Nutrition assessment	54
Stability ball-based classes	54
Cardiorespiratory circuit training	52
Seniors' classes	52
Nutrition coaching	52
Postrehab following injury	51
Combination/Hybrid classes	51
Pilates and yoga fusion	51
Online client reminders and information	50
Plyometrics	49
Body weight leverage training (e.g., body weight only, TRX® Suspension Training®, GTS® [Gravity	

Do you offer the program?	% of all respondents
Training System], climbing ladders, ropes, push-up and pull-up devices)	49
Personal training, outdoor	47
Cardiorespiratory endurance training	47
Branded choreography	47
Back pain prevention	46
Cardiorespiratory cross training	45
Body weight leverage classes (e.g., body weight only, TRX® Suspension Training®, GTS®, climbing ladders, ropes, push-up and pull-up devices)	44
Social activity groups (e.g., walking or running clubs, group trips, organized group activities)	43
Exercise for chronic medical conditions (e.g., diabetes, coronary heart disease)	43
Water fitness	43
Strength training, group, no music	43
Boxing-based/Kickboxing sessions	40
Kids' fitness (e.g., classes or after-school programs, aged 12 and younger)	39
Group reformer classes	38
Strength training, group, choreographed to music	38
Walking	38
Lifestyle coaching	37
Weight management classes	36
Group activities, outdoor	34
Boot camp classes, outdoor	32
Small-group classes on machines	32
Tai chi	29
Teen fitness (e.g., classes or after-school camps, aged 13–17)	26
Mind-body fusion	25
Meditation	24
Sports clinics	23
Pre/postnatal classes	20
Very slow strength training	20
Online training programs	19
Martial arts-based aerobics	18
Parent-and-baby classes	18
Olympic-style lifting	16
Mixed-martial arts	12
Gyrotonic® or Gyrokinesis® exercise	4 >>

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## MULTIPLE-YEAR TREND COMPARISON: PROGRAMS

% of all respondents offering the program

Program	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	% Point Change*
Abdominals workouts	72%	66%	57%	56%	61%	62%	74%	71%	72%	71%	-1
Aerobics, combined	85	73	60	55	49	47	49	57	66	68	-17
Back pain prevention	38	47	40	33	41	43	48	46	41	46	+8
Body weight leverage <i>classes</i> (e.g., body weight only, TRX® Suspension Training®, GTS®, climbing ladders, ropes, push-up and pull-up devices)	—	—	—	—	—	—	—	—	42	44	+2
Body weight leverage <i>training</i> (e.g., body weight only, TRX® Suspension Training®, GTS®, climbing ladders, ropes, push-up and pull-up devices)	—	—	—	—	—	—	—	—	46	49	+3
Body weight—only training	—	—	35	31	39	36	54	49	—	—	n/a
Boot camp classes, indoor	—	—	28	35	36	36	47	51	67	66	+38
Boot camp classes, outdoor	—	—	14	16	16	30	28	32	28	32	+18
Boot camps, small-group	—	—	—	—	—	—	—	47	52	59	+12
Boxing-based/Kickboxing classes	71	50	42	48	39	36	39	33	36	40	-31
Branded choreography	—	—	—	—	—	22	—	22	45	47	+25
Cardiorespiratory circuit training	—	—	—	—	—	—	—	—	—	52	n/a
Cardiorespiratory cross training	—	—	—	—	—	—	—	—	—	45	n/a
Cardiorespiratory endurance training	—	—	—	—	—	—	—	—	—	47	n/a
Cardiorespiratory interval training	—	—	—	—	—	—	—	—	—	62	n/a
Circuit classes	69	66	57	56	51	48	69	66	77	75	+6
Circuit training, small-group	—	—	—	—	—	—	—	55	66	72	+17
Clinics on special topics	68	74	63	64	60	58	66	64	65	62	-6
Combination/Hybrid classes	70	65	45	48	43	38	47	36	58	51	-19
Community outreach programs	—	—	—	—	54	51	61	57	62	70	+16
Core-conditioning classes	72	75	64	63	62	65	73	66	80	78	+6
Cycling-based classes, indoor	44	48	38	45	39	37	46	45	59	64	+20
Dance (e.g., urban street, funk, hip-hop)	30	33	24	27	31	34	40	39	56	64	+34
Exercise for chronic medical conditions (e.g., diabetes, coronary heart disease)	—	—	30	32	35	31	40	46	38	43	+13
Fitness assessment	85	85	77	82	84	77	76	81	90	84	-1
Functional resistance training	—	—	—	—	—	—	—	—	—	70	n/a
Group activities, outdoor	44	44	35	34	29	50	36	32	31	34	-10
Gyrotonic® or Gyrokinesis® exercise	—	—	—	—	3	4	2	1	4	4	+1
Health fairs	60	53	46	44	43	38	44	44	49	59	-1
Kids-specific fitness	44	45	40	41	—	—	—	—	—	—	n/a
Kids' fitness (classes or after-school programs)	—	—	—	—	37	33	36	—	—	—	n/a
Kids' fitness (classes or after-school programs, aged 10 and younger)	—	—	—	—	—	—	—	31	27	—	n/a
Kids' fitness (classes or after-school programs, aged 12 and younger)	—	—	—	—	—	—	—	—	—	39	n/a
Lifestyle coaching	—	—	32	27	34	27	33	38	44	37	+5
Martial arts-based aerobics	43	40	20	19	29	20	21	20	19	18	-25
Meditation	37	27	17	18	17	16	19	23	26	24	-13
Mind-body fusion	—	—	—	—	—	27	20	16	31	25	-2

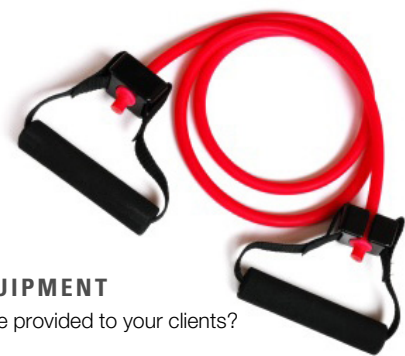
\*Over 10 years or since records began.

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Program	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	% Point Change*
Mixed martial arts	—%	—%	—%	—%	—%	—%	—%	—%	6%	12%	+6
Nutrition assessment	—	—	51	55	55	45	51	48	59	54	+3
Nutrition counseling or coaching	48	67	48	47	48	44	53	47	61	52	+4
Olympic-style lifting	—	—	—	—	—	—	—	—	—	16	n/a
Online client reminders and information	—	—	—	—	30	32	45	51	55	50	+20
Online training programs	—	—	8	7	5	5	9	15	14	19	+11
Parent-and-baby classes	32	25	17	17	18	15	19	18	16	18	-14
Personal training											
All types combined	87	90	89	88	85	82	89	91	97	99	+12
One-on-one	87	87	83	87	—	—	—	—	—	—	n/a
Adult, one-on-one	—	—	—	—	84	80	87	89	96	99	+15
2 clients share	66	71	65	71	68	71	83	79	90	93	+27
3-5 clients share	43	54	42	43	44	44	58	60	76	78	+35
Youth, aged 18 or younger, one-on-one	—	—	—	—	60	55	63	64	70	68	+8
Outdoor	—	—	26	24	27	60	32	31	32	47	+21
Pilates	63	65	63	66	64	68	68	70	90	88	+25
Pilates and traditional strength training fusion	—	—	34	27	29	—	—	—	—	—	n/a
Pilates and yoga fusion	—	—	31	30	32	38	40	43	59	51	+20
Pilates or yoga training, one-on-one	—	—	55	60	59	48	48	56	61	61	+6
Pilates reformer classes, group	—	—	—	—	—	—	—	—	37	38	+1
Plyometrics	—	—	—	—	—	—	—	—	—	49	n/a
Postrehab following injury	—	—	46	38	47	42	48	44	51	51	+5
Pre/postnatal classes	28	26	21	18	17	19	20	17	16	20	-8
Seniors' classes	61	54	47	49	45	39	51	55	43	52	-9
Small-group classes (8 people or fewer)	—	—	41	44	45	48	55	58	—	—	n/a
Small-group classes on machines	—	—	24	28	28	24	35	32	35	32	+8
Social activity groups (walking or running clubs, group trips, organized group activities)	—	—	—	—	—	—	43	45	44	43	0
Sports clinics	33	38	24	24	25	16	31	26	33	23	-10
Sport-specific training	55	57	53	47	56	42	67	52	59	58	+3
Stability ball-based classes	61	71	67	58	55	54	61	59	63	54	-7
Step aerobics	82	67	52	59	50	44	46	53	65	58	-24
Strength training, one-on-one	—	75	74	76	74	67	82	81	88	83	+8
Strength training, group											
All types combined	87	79	79	80	77	74	88	83	78	78	-9
Background music	69	61	64	60	58	58	74	71	62	68	-1
Choreographed to music	60	45	45	42	41	32	47	40	39	38	-22
No music	45	37	30	32	32	29	48	47	42	43	-2
Stretching and/or flexibility	82	82	72	70	73	68	81	81	78	77	-5
Tai chi	35	37	26	24	20	22	24	25	31	29	-6
Teen fitness (e.g., classes or after-school camps, aged 13-17)	—	—	—	—	—	—	—	30	25	26	-4
Very slow strength training	—	—	17	17	22	22	30	19	17	20	+3
Walking	38	44	36	33	34	30	36	34	33	38	0
Water fitness	56	45	35	43	34	27	38	35	32	43	-13
Weight management classes	56	51	33	36	35	32	31	38	43	36	-20
Yoga	85	73	60	66	58	56	61	62	82	82	-3 >>

\*Over 10 years or since records began.

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## MOST FREQUENTLY OFFERED EQUIPMENT

Which of the following types of equipment are provided to your clients?

**% of all  
respondents**

Resistance tubing or bands	93%
Stability balls	90
Foam rollers and small balls	89
Medicine balls	86
Balance equipment (e.g., BOSU® Balance Trainers, disks, wobble boards, balance boards)	86
Barbells and/or dumbbells	86
Yoga mats and equipment	80
Steps and platforms	77
Weighted bars	73
Cycles, upright	70
Pulley equipment	69
Elliptical trainers	69
Treadmills	68
Strength machines, selectorized (pin-selected)	68
Cycles, recumbent	65
Blood pressure cuffs/stethoscopes	64
Body composition analyzers	61
Body weight leverage equipment (TRX® Suspension Trainer™, GTS®, climbing ladders, ropes, push-up and pull-up devices)	57
Rowing machines, indoor	56
Strength machines, plate-loaded	55
Cycles, for indoor classes	54
Stair climbers	53
Kettlebells	49
Pilates equipment	48
Heart rate monitors	44
Water fitness equipment	43
Boxing equipment	40
Pedometers	26
Arm ergometers	25
Postural assessment technology	23
Nutrition analysis software	22
Goniometers	17
Computer workout tracking	16
Pneumatic machines	14
Strength machines, computerized	12
Computer training programs, interactive (exergaming)	11
Vibration devices/technology	5
Child-sized machines	3
Gyrotonic® equipment	3

## Equipment

- Small equipment again tops the survey this year with resistance tubing or bands (93%), stability balls (90%), foam rollers and small balls (89%), barbells and dumbbells (86%), medicine balls (86%) and balance equipment (86%) being reported as the most frequently offered equipment.
- All small equipment has increased in usage over the past 10 years with the exception of barbells and/or dumbbells and steps and platforms.
- Of the different types of cardiorespiratory equipment, all have declined in usage with the exception of indoor rowing machines.
- While some assessment equipment (blood pressure cuffs/stethoscopes, body composition analyzers) are offered by more than half of the facilities, others such as postural assessment technology, nutrition analysis software and goniometers are offered at fewer than a quarter of the facilities.

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## MULTIPLE-YEAR TREND COMPARISON: EQUIPMENT

% of all respondents offering the equipment

Equipment Provided	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	% Point Change*
Arm ergometers	—%	—%	—%	—%	—%	—%	—%	24%	25%	25%	+1
Balance equipment (e.g., BOSU® Balance Trainers, disks, wobble boards, balance boards)	—	—	60	70	75	79	83	80	87	86	+26
Barbells and/or dumbbells	93	91	87	89	90	78	87	91	90	86	-7
Blood pressure cuffs/stethoscopes	—	—	—	—	—	—	—	—	—	64	n/a
Body composition analyzers	—	—	—	—	—	—	—	—	—	61	n/a
Body weight leverage equipment (e.g., TRX® Suspension Trainer™, GTS®, climbing ladders, ropes, push-up and pull-up devices)	—	—	—	—	—	—	—	25	56	57	+32
Boxing equipment	48	42	36	36	41	29	40	32	42	40	-8
Child-sized machines	—	—	—	—	2	4	5	5	4	3	+1
Computer training programs, interactive	16	13	8	9	8	5	5	10	7	11	-5
Computer workout tracking	21	18	16	14	17	11	14	17	18	16	-5
Cycles, for indoor classes	46	51	42	48	41	38	50	45	46	54	+8
Cycles, recumbent	77	69	68	72	68	60	68	68	67	65	-12
Cycles, upright	83	77	67	70	60	56	67	61	63	70	-13
Elliptical trainers	77	75	70	74	71	60	70	67	72	69	-8
Foam rollers and small balls	—	—	62	64	72	72	82	81	83	89	+27
Goniometers	—	—	—	—	—	—	—	—	—	17	n/a
Gravity trainers	—	—	11	12	11	9	12	9	—	—	n/a
Gyrontonic® equipment	—	—	—	—	2	3	3	2	2	3	+1
Heart rate monitors	—	—	—	—	—	—	—	—	37	44	+7
Kettlebells	—	—	—	—	—	—	—	—	43	49	+6
Medicine balls	—	—	—	—	—	71	81	79	87	86	+15
Nutrition analysis software	23	26	23	26	27	19	21	16	22	22	-1
Pedometers	—	—	—	—	—	—	—	—	26	26	0
Pilates equipment	29	34	28	35	37	44	46	44	50	48	+19
Pneumatic machines	—	—	9	12	8	7	9	10	11	14	+5
Postural assessment technology	—	—	—	—	—	—	—	—	—	23	n/a
Pulley equipment	72	70	66	65	68	62	73	64	70	69	-3
Resistance tubing or bands	91	92	90	89	90	84	94	94	95	93	+2
Rowing machines, indoor	—	—	—	—	—	—	—	42	45	56	+14
Stability balls	79	89	87	87	89	85	88	92	95	90	+11
Stair climbers	82	70	59	64	51	50	60	48	51	53	-29
Steps and platforms	91	85	75	76	76	66	73	74	81	77	-14
Strength machines, computerized	17	17	11	13	10	6	9	11	10	12	-5
Strength machines, selectorized (pin-selected)	56	63	68	69	66	56	65	64	66	68	+12
Strength machines, plate-loaded	—	—	62	64	60	53	62	50	60	55	-7
Treadmills	85	79	74	76	74	65	73	71	76	68	-17
Vibration devices/technology	—	—	—	—	—	—	—	—	—	5	n/a
Water fitness equipment	—	—	31	40	34	28	39	35	37	43	+12
Weighted bars	71	72	62	61	64	64	70	65	82	73	+2
Yoga mats and equipment	73	73	63	65	65	70	73	70	85	80	+7

\*Over 10 years or since records began. ●