

FutureNow.

Fitness Industry Snapshot

FutureNow is an independent body that provides industry informed advice to influence skills development strategies across the Creative, Leisure and Technologies sectors. Our work assists Western Australia to be prepared with the new order skills required by the evolving economy and our changing society.

A new era of exercise

An evolution in exercise motivation

The fitness industry has seen a distinct motivational shift in why we exercise. People no longer exercise primarily for physical appearance. They want to de-stress, socialise, manage their mental health, and if aging, manage their physical health.¹ Exercise environments are being set up with an entrance or separate room, with comfortable lounge-style chairs, tea and coffee facilities and a beautiful visual space. Encouraging meeting before and after class, promoting social interaction and a sense of belonging. Exercise options are changing with a greater range of mind-body and lower impact options, such as yoga and pilates (reformer and barre).

Creating an inclusive, community exercise group

There has been an increase in boutique style fitness studios, offering a sense of local community, encouraging loyalty to instructor and studio. This follows the success of studios such as CrossFit and F-45.² The brand feel is like one big happy, healthy family. All with the same purpose, whether that be martial arts to functional fitness to yoga. This specialisation allows studios to create a market distinction from competitors, important in a crowded market. There is a shift towards inclusiveness. Making everyone feel welcome. AusActive, the peak fitness body changed their business name and entire brand and message in 2022 to fit in with what some are terming as - a new era of exercise. AusActive's brand message is 'Activating every body. Every way. Every day'.

Focal shift to health and wellness

Larger franchises are re-structuring their gymnasium floors and offerings. Presenting more floor space with less equipment to allow for creativity, flexibility and individualisation of exercise programs. With new offerings such as pilates reformer studios, wellness spaces, infrared saunas and massage chairs, and classes including meditation and breathe work. Health and wellness retreats are sometimes included, and the focus is on creating wellness and happiness. Exercise is also being sought after for anti-aging reasons, not from a cosmetics perspective, but to prevent illness and pain.³

Many studios and larger franchises that suffered through the COVID-19 pandemic and vaccination mandates are now reaping the benefits of a shift to wellness, often charging a premium for these types of classes and services, which people are willing to pay.

Reduction in gender disparity between exercise selection

The gender disparity between fitness activities is narrowing, such as more women in the cross fit section of the gym and more men attending yoga and other mind-body classes. Chris Hemsworth recently released a series on Disney plus titled "Limitless". Showing his newfound interest in activities which enhance longevity and stress management. The series includes immersion in cold water for anti-inflammation benefits and underwater hockey for breathing and calm

management techniques. This reflects the new current movement towards health and wellbeing.

Fitness education and employment shift

Reduction in gender disparity between exercise selection

Industry has indicated there is a decline in those studying fitness, and graduates are a younger cohort than before COVID-19. This has resulted in some as young as 19 becoming gym managers for large fitness franchises. Previously the path to become a gym manager you required years of experience, yet due to staff loss and salaries being low in relation to other industries, this is changing. Industry has indicated this isn't a problem in some gymnasium settings as upper management supervision is on site. However for those that recruit fitness and wellness instructors for fly in, fly out (FIFO) mining roles this is an issue. These FIFO roles are more extensive and require an ability to liaise with site managers, event coordinators and other relevant staff in an unsupervised, decision-making role. This combined with the shock of FIFO work, means recruiters for these roles prefer mature aged staff. There are difficulties in sourcing these workers in WA.

Complementary employment gaining career interest

Industry have also indicated that there is a shift of people who once might have been attracted to studying fitness are instead choosing to study complementary training, such as remedial massage and nutrition, or choosing to become specialist instructors, such as completing their yoga teacher training.

Employment solutions to attract and retain personal trainers

Personal training employment has been re-structured from a rent-based system to an hourly rate in large franchises and some private organisations. Personal trainers are turning to this as their preferred option as they can manage their income depending on hours worked and have a greater sense of job security. This industry is casual in nature and requires strong business and marketing skills to succeed. Some private organisations are offering to conduct the marketing for personal trainers with them just focusing on conducting the sessions to attract staff.

Enhancing the fitness learning experience and career pathways

COVID-19 prompted the enhancement of online fitness curriculum. This was seen as a positive for the industry. The way forward seems to be a blended learning approach. With those interested in fitness being social and practically orientated, wanting face to face and industry experience along with the flexibility and speed of studying online. Greater relationship links have been made between private education providers and industry employers setting up work experience and introductions for students. This presents a pathway into employment after graduating.

Strategic shift of exercise towards the health sector

At a strategic level there is a considered shift to where exercise fits within a society. Exercise seems to be moving away from leisure and towards the health sector.⁴ With a focus on the preventative health benefits exercise offers the workplace, community, and medical system. Participants can access exercise physiologists who design specialised programs according to medical conditions through Medibank and select health funds. Though some industry experts say doctors still prefer to refer people through the traditional pathway to physiotherapists. This shift towards using exercise specialists aligns with the aging population and the move towards maintaining physical health and the reduction of pain.

Exercise motivations and preferred exercise choices

Whilst physical health and fitness is still the highest motivator to exercise for men and women over 15, as mentioned previously there is an increasing trend to exercise for social, psychological/mental health, to be outdoors and enjoy nature, and fun and enjoyment reasons.

The top five non-sport related fitness choices that women across Australia select are:

- walking (recreational) at over 6.2 million
- fitness/gym at over 4.4 million
- yoga at over 1.2 million
- bush walking at over 1 million
- pilates at over 900,000.

The top four non-sport related fitness choices that men across Australia select are:

- walking (recreational) at 3.8 million
- fitness/gym at over 3.5 million
- yoga at over 1 million
- bush walking at over 800,000.⁵

Men have a lower participation in non-sport related fitness choices with a higher preference for sports-related activities than women. This could also be why fitness boutiques and gymnasiums are increasingly marketing and providing service offerings to appeal to women.

Balancing life and exercise - an increasing challenge

An increased barrier to exercise is that exercise is no longer seen as a priority given the multitude of tasks people need to balance in their lives.⁶

Non-compliance of membership cancellations

One of the side effects of this is the cancellations of gym and fitness memberships. In isolation this not a problem, however Consumer Protection has indicated some gym and fitness owners are refusing to accept member cancellations and/or using pressure tactics to discourage members from ending an agreement. There have also been cases where owners have not ended third party, direct payments after a membership have been cancelled. In October 2022 Consumer Protection notified relevant stakeholders via email and video about the rights to cancelling membership.

Yoga and pilates – an increasing exercise participation trend

Yoga and pilates are now in the top five non-sport activities for women over 15+ ages across Australia and is starting to become an exercise trend for men too.⁷ This aligns with the aging population and the shift into exercise for social and mental health reasons. There is concern however that pilates is being taught in gyms and fitness centre/studios by those who have completed a short pilates course, with a background as a fitness trainer, and thus these staff may not have the injury management and adapted program design skills to cater for the public in a group format. Industry have indicated that there has been a rise in injury reports from non-clinical pilates settings. There are increasing government approved training options such as a Diploma in Pilates (10828NAT Diploma of Polestar Pilates Comprehensive Instruction Method) taught in Western Australia. This accredited national course is recognised by the governing body – Pilates Alliance Australasia. With the growing need for pilates instructors, the number of qualifications on offer and student enrolments is predicted to rise.

Yoga teacher training

There is an increasing trend for boutique yoga studios to offer yoga teacher training, and this can be one of their major sources of income. Those offering private practice yoga teacher training, based on hours, often indicate that graduates

will be eligible to become a registered yoga trainer with Yoga Alliance – an Australian not-for-profit representing the yoga community. Government accredited yoga teacher training is available interstate at Diploma level but not yet in Western Australia.

Most pilates and yoga instructors are like fitness instructors in that they often have secure work on the side or start off their career transition in this way. The cost of the training can be high and often people study this because they are passionate about the benefits these types of exercise offer and feel aligned with the community.

What does this all mean for skill development?

If the interest in yoga and pilates continues to grow there will need to be an analyse the level of accredited training on offer and if this is meeting workforce demand. There might need to be consideration of these careers' pathways and skill development, including the possibility of developing a traineeship. The other concern is the mentoring and supervision for skill development of those fitness instructors in FIFO roles. Along with knowledge and skills in program design for the aging population.

Industry Initiative Reports 2022

[AusPlay National Sport and Physical Activity Participation report, November 2022](#) – this report shows key statistical changes in sport and non-sporting activities throughout Australia.

[AusActive 2022 Annual report](#) – the annual report highlights results and trends of the peak body for health, fitness and wellbeing in Australia.

[Global Action Plan on Physical Activity 2018-2030](#) – this global plan is driving strategy in physical activity within Western Australia from peak bodies such as AusActive.

[FutureNow Fitness Career Resources](#) – a case study interview of a fitness staff member and an overview of key fitness interests, skills, working environment and fitness educational career pathways accessible via the FutureNow website.

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We would like to hear from you

FutureNow continually seeks feedback from the health, fitness and wellbeing sector to facilitate workforce development, and the development and delivery of responsive training and skills sets to meet emerging sector needs. If you can contribute to this in any way or require further information, please contact

[Kelly Perry](#)

Industry Development Manager – Sport, Fitness, Aquatics and Recreation

Mob: 0459 984 873

Email: kperry@futurenow.org.au

Web: www.futurenow.org.au

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