

**ZO
OM**
MEDIA

GYM Z



- Gym Z vs Gen Z
- Who are Gym Zs?
- Switching off, to switch on
- In the gym
- Outside the gym
- The value of Gym Z
- 'Zooming' in on our Gym Zs



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MEDIA

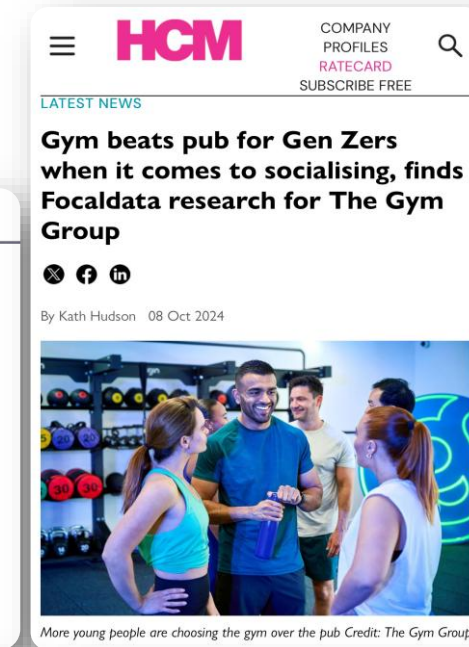
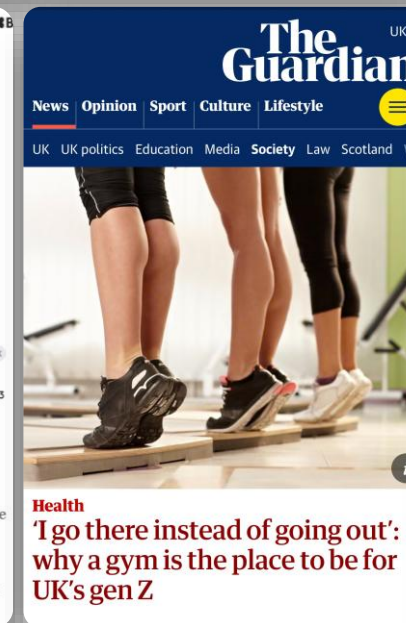
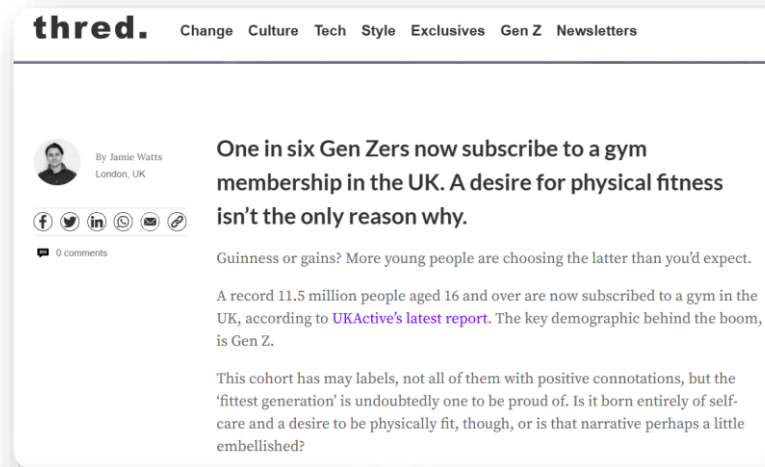
GYM Z vs GEN Z



“Gym memberships in the UK increased by 6.1% in 2024 reaching 11.5m members.

*This has been driven by Gen Z once again, with those aged between 16-34 more likely to be a current member. **For young consumers, a gym membership has become an essential rather than a “nice to have”.***

- UK Active



GYM Z VS GEN Z

Whilst this generation are grouped together and generalised as one audience, the behavioural differences between Gen Zs and Gym Zs are stark.



Gym Z

Gym Z are those committed to going to the gym at least once a week (including classes)

Non-Gym Z

Non-Gym Z are those who don't go to the gym (or classes) with any regularity

WHO ARE GYM Z?



WHO ARE GYM Z?

Ambitious

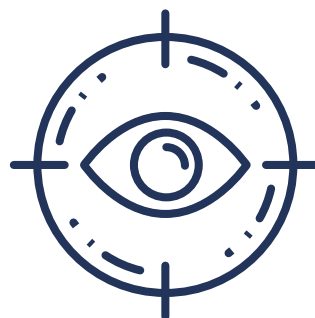
70%

say when they visit the gym, they're focussed on specific goals

Growth mindset

71%

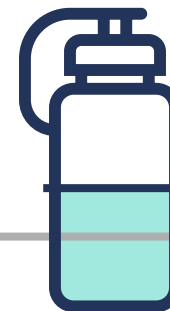
say wealth and financial success are very important to them
vs. 45% of non-Gym Z



Self-assured

84%

say they're confident in their abilities
vs. 62% of non-Gym Z



51%

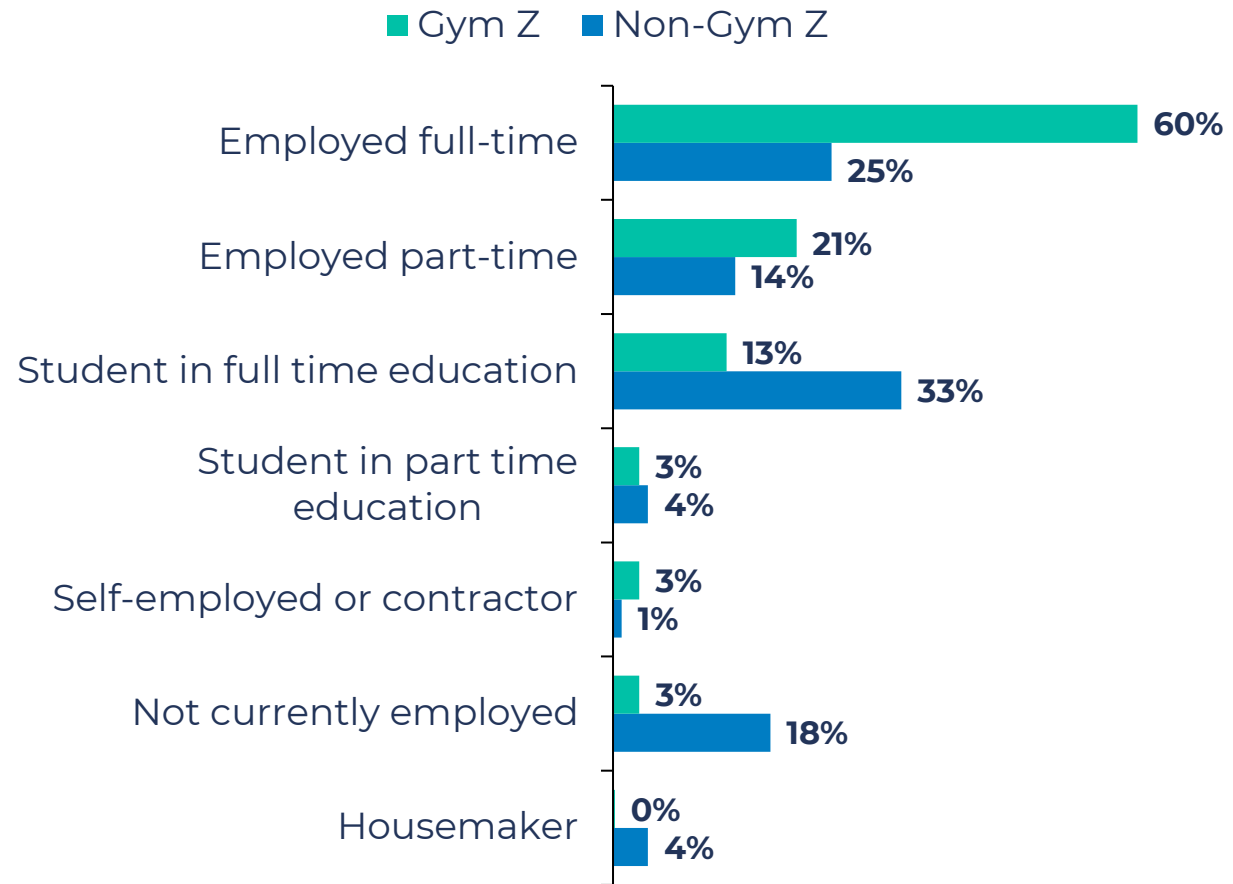
vs. 35% of non-Gym Z

"I'm a glass half full sort of person"

Compared to non-Gym Z, Gym Z:

- Are older (44% aged 25-28 vs. 24% of non-Gym Z)
- Are of a higher social grade (80% ABC1 vs. 57% of non-Gym Z)
- Are based more frequently in Greater London (40% vs. 15%)

THEY'RE AFFLUENT AND MOST WORK FULL TIME



WHAT'S IMPORTANT TO THEM?

Gym Z are focused on their financial and career success alongside their health and wellness goals.

Gym Z			Non-Gym Z		
1	Career success	89%	1	Career success	72%
2	Health and wellness	89%	2	Wealth/financial success	71%
3	Wealth/financial success	88%	3	Health and wellness	71%
4	Connecting with my community	79%	4	Connecting with my community	41%
5	Popularity and having a wide social circle	66%	5	Popularity and having a wide social circle	30%
6	Fame/being admired by others	63%	6	Fame/being admired by others	22%

IN THE GYM



WANT TO GO, NOT HAVE TO GO

76%

love exercising and are
always looking for more
opportunities to do so

% who enjoy each type of exercise

79%

Working out in a gym

72%

Attending classes at a gym

68%

Attending non-gym classes <<<



CHASING HIGHS

Gym Z feel the positive mental effects of working out more so than non-Gym Z. After a workout...

90%

feel happier and more
positive
vs 60% non-Gym Z

87%

have a better outlook
on life
vs 60% non-Gym Z



CHASING BRANDS

In a positive mindset, consumers are...

40%

more likely to be
receptive to advertising

15%

more likely to follow
up on advertising



SWITCHING OFF, TO SWITCH ON

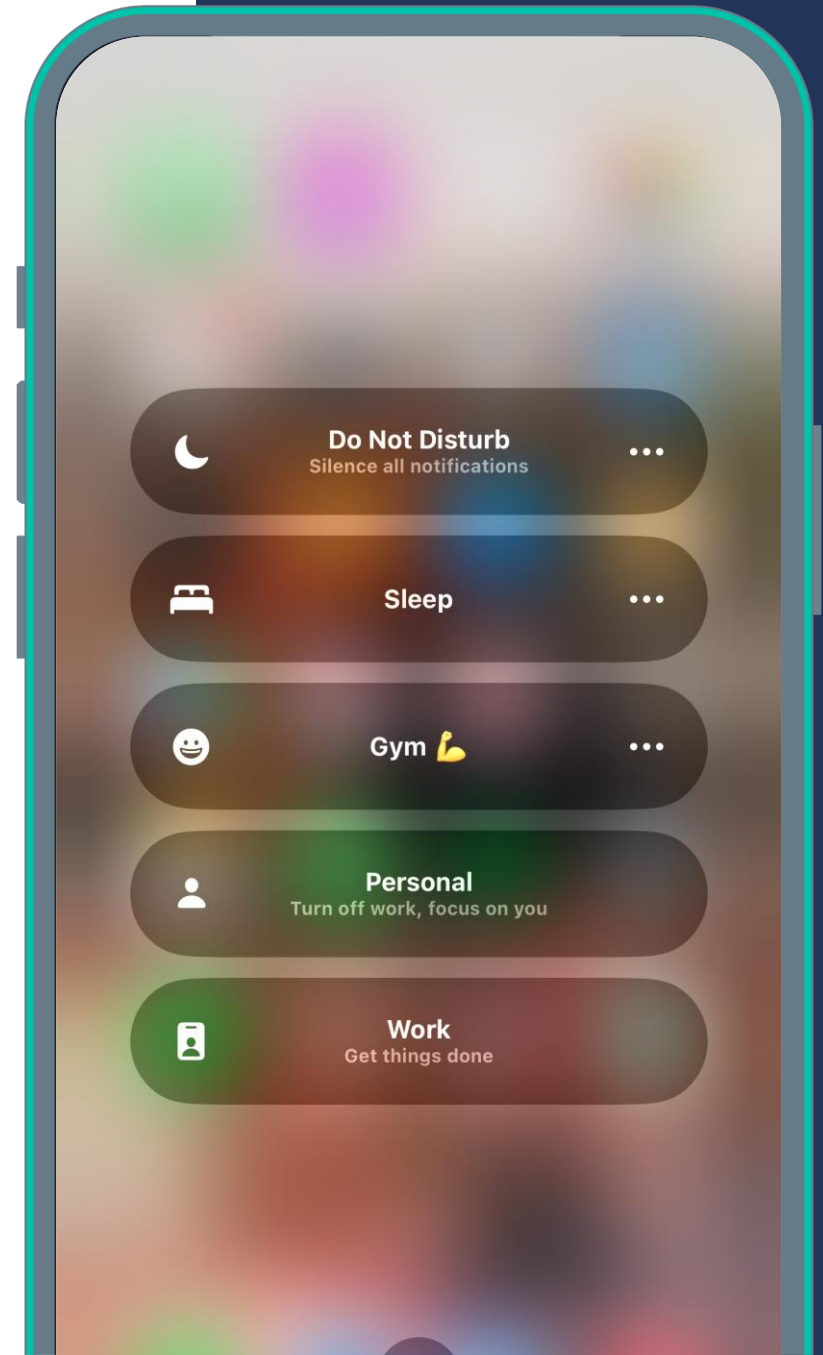
Gym Z are more 'online' than the rest of their age group outside of the gym, but they're using their gym time as a digital detox.

62%

say going to the gym is a way for them to disconnect from social media and the internet

77%

pay more attention to their surroundings when they spend less time online

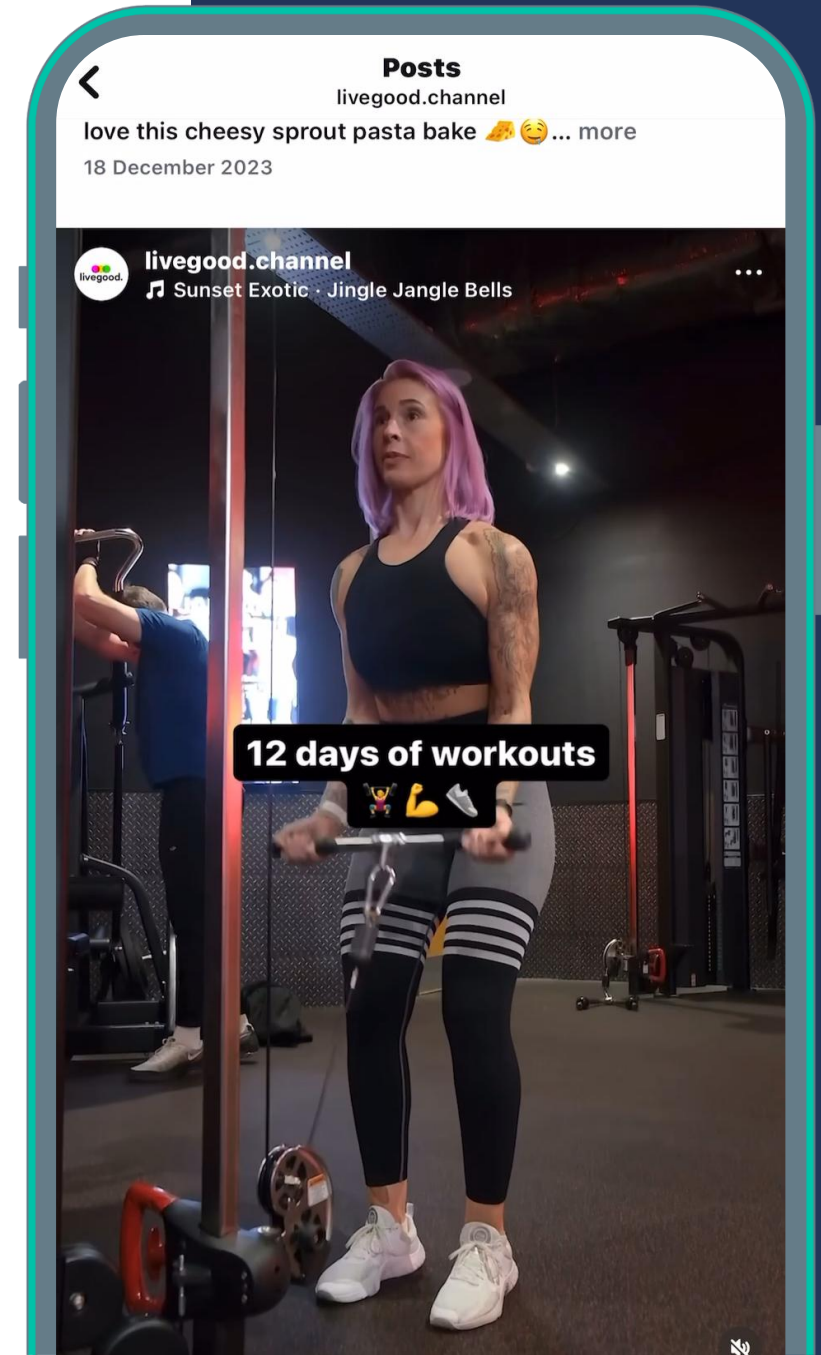


Gym Z rely heavily on social media for health & fitness inspiration; this presents an omnichannel opportunity for brands utilising social media alongside our OOH network, fully priming and engaging with this valuable audience.

91%

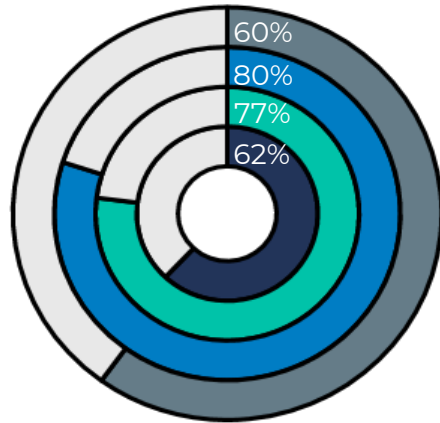
use social media in
relation to exercise
vs 55% of non-Gym Z

54%	Getting workout ideas
51%	Following workout videos
30%	Posting my workouts online – sharing with friends/family
24%	Posting my workouts online – publicly
14%	Using message boards

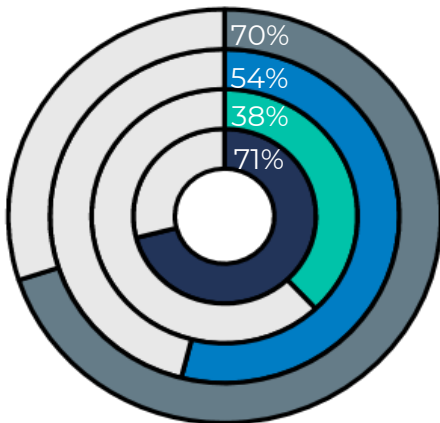


WHEN DO THEY GO TO THE GYM?

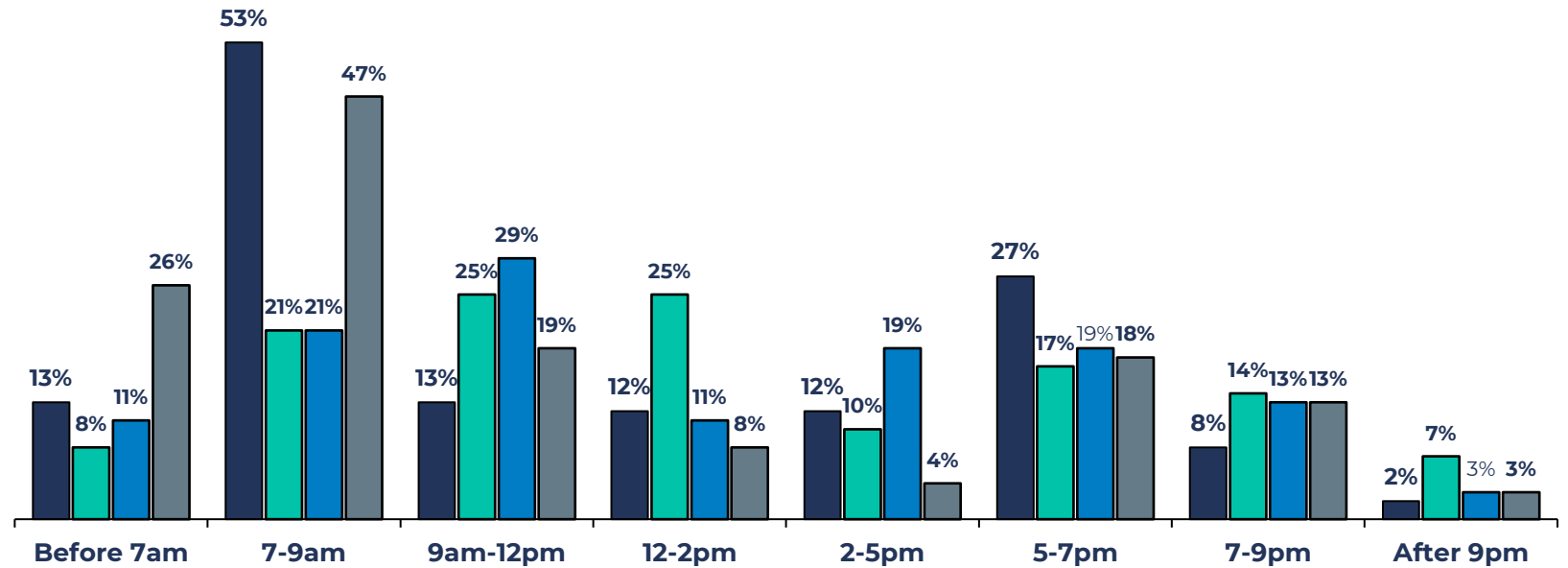
Weekdays



Weekends



■ u16s ■ 16-20 ■ 21-24 ■ 25-28



OUTSIDE THE GYM



FOOD & DRINK

Even outside of the gym, Gym Z put a lot of time and effort in to supporting their fitness journey when it comes to nutrition.

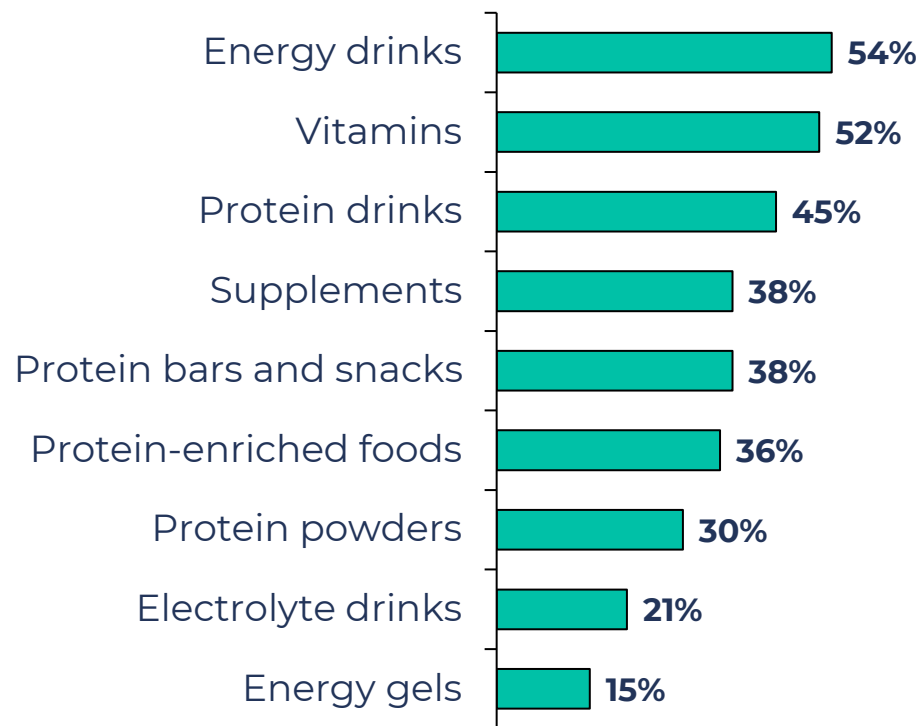
80%

"I put time into researching what food and drink is available to support my journey"

80%

"I am willing to spend more money on food and drink that supports my fitness journey"

What do Gym Z buy to support their fitness journey?



This commitment translates to what they wear in the gym too.

76%

"I notice brands other people in the gym are wearing"

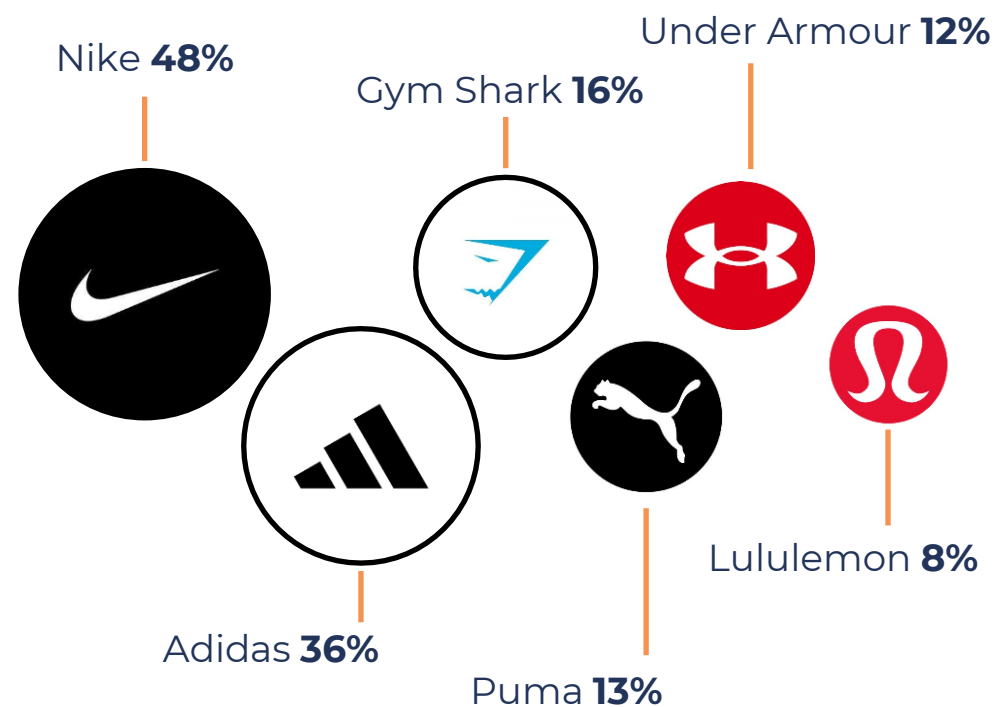
77%

"I like to look good in the gym"

67%

"I follow the latest athletic fashion trends"

Favourite gymwear brands among Gym Z

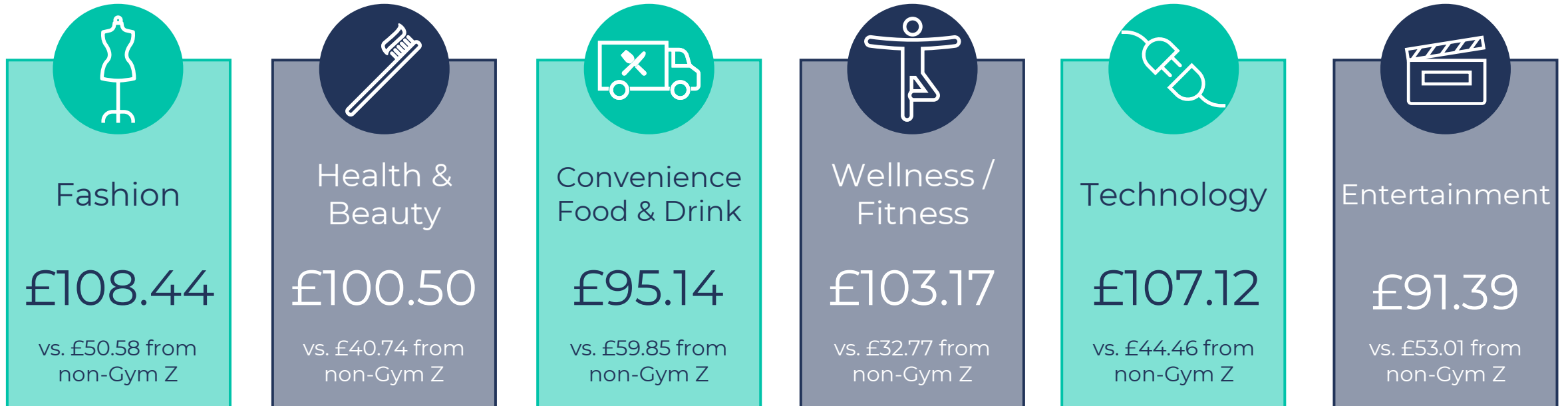


THE VALUE OF GYM Z



SPENDING POWER

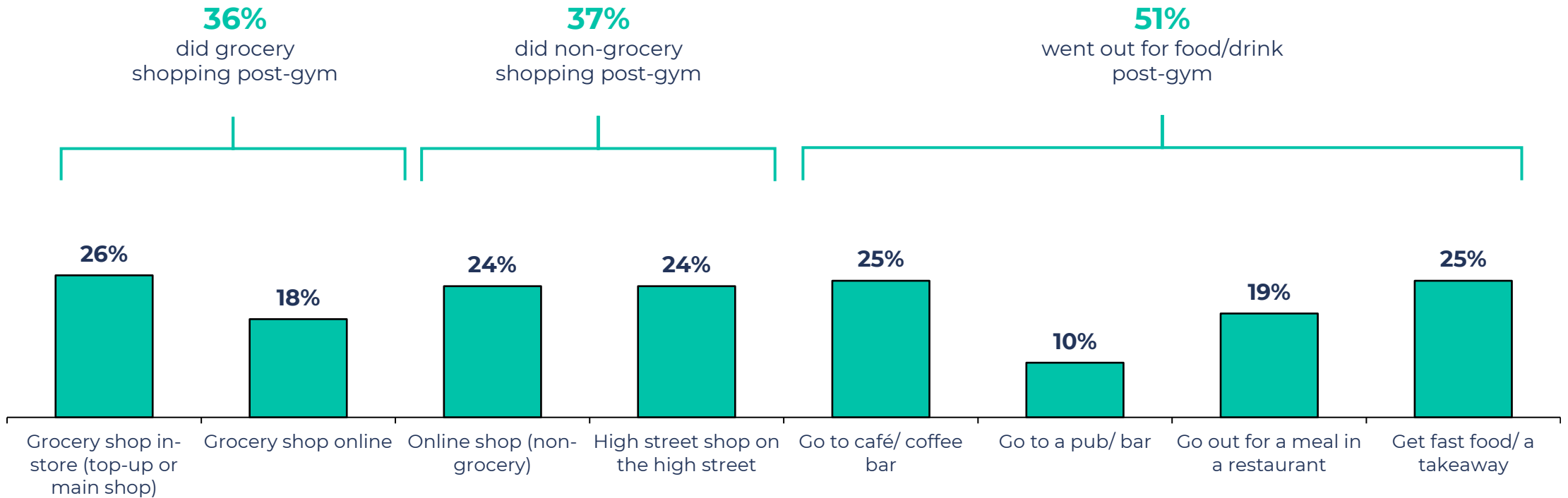
Where are Gym Z spending their money?



**How much do you think you spend on each of these categories each month? Mean spend*

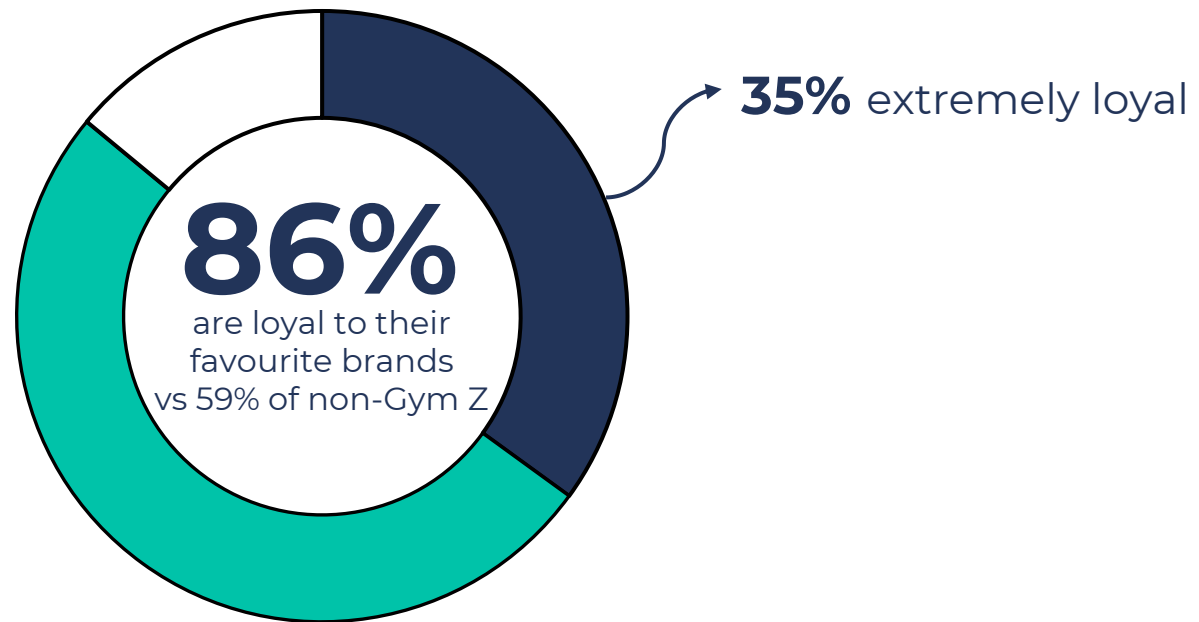
POST-GYM PURCHASING

Gym Z's behaviour immediately after visiting the gym



LOYALTY

Gym Z are fiercely loyal to their favourite brands. Whilst this serves existing popular brands among Gym Z well already, this is also an opportunity to break-through to this audience and become a non-negotiable purchase for them.

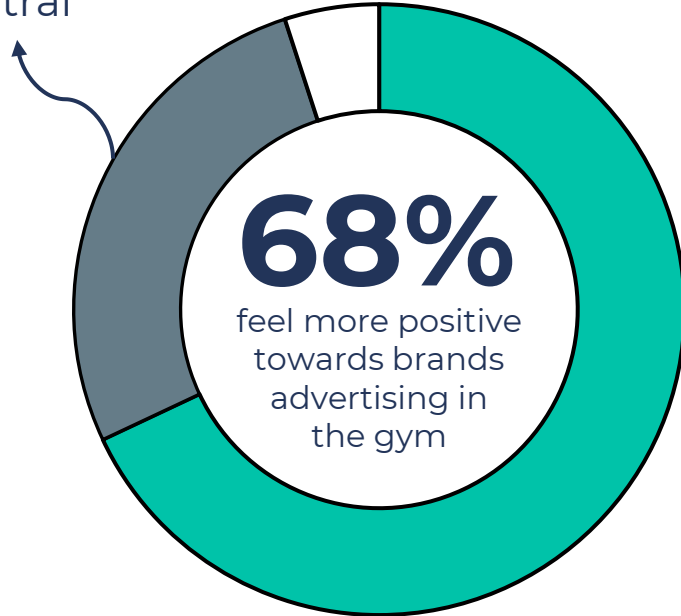


'ZOOMING' IN ON GYM Z

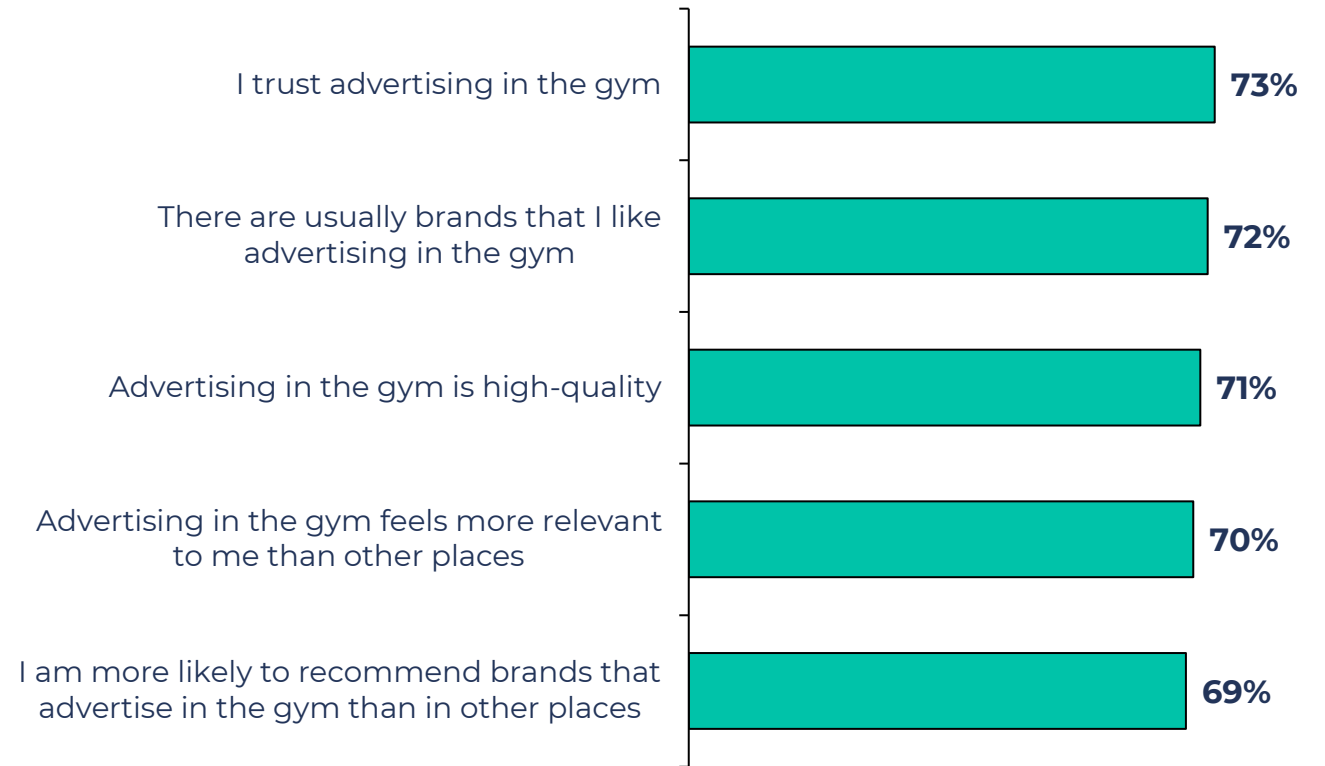


TRUSTED & RELEVANT ADVERTISING

27% neutral



% of Gym Z who agree that...



IN THE ZONE

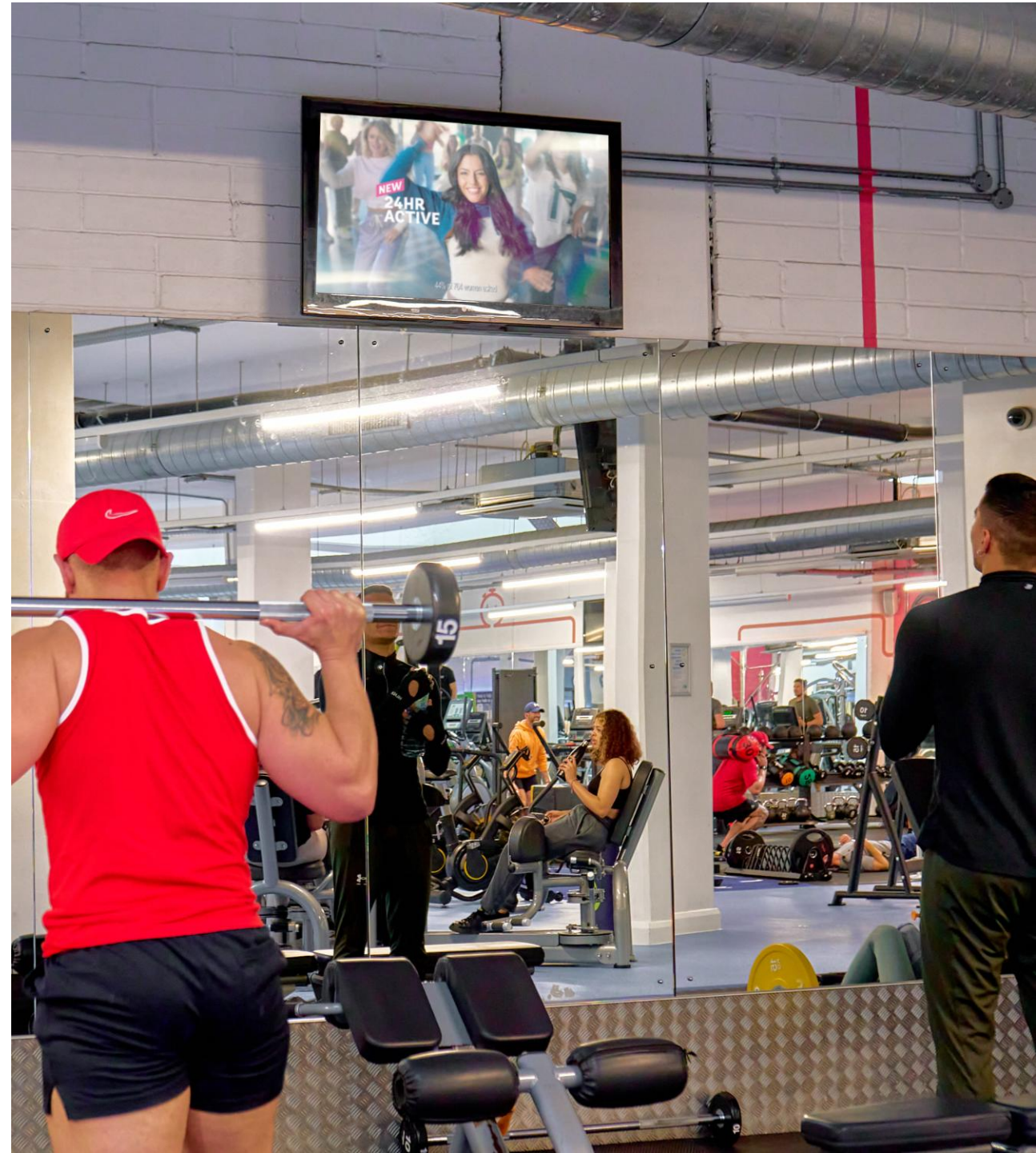
Not only do they value our advertising,
when they're in the zone, they're paying
attention to it.

71%

pay attention to
advertising in the gym

69%

notice advertising more
when they're in the zone at
the gym





DON'T UNDERESTIMATE GYM Z

Gym Z are confident, self-assured and have a growth mindset. Not only do they love the gym, but they're receptive to advertising in the gym environment. They trust brands that advertise in gyms and are more likely to notice advertising when they're in the zone on the gym floor.

When compared to their non-gym going counterparts in Gen Z, they are more affluent and willing to spend across all categories, especially wellness and fitness. Appealing to the Gym Z audience is key for in-gym advertising.



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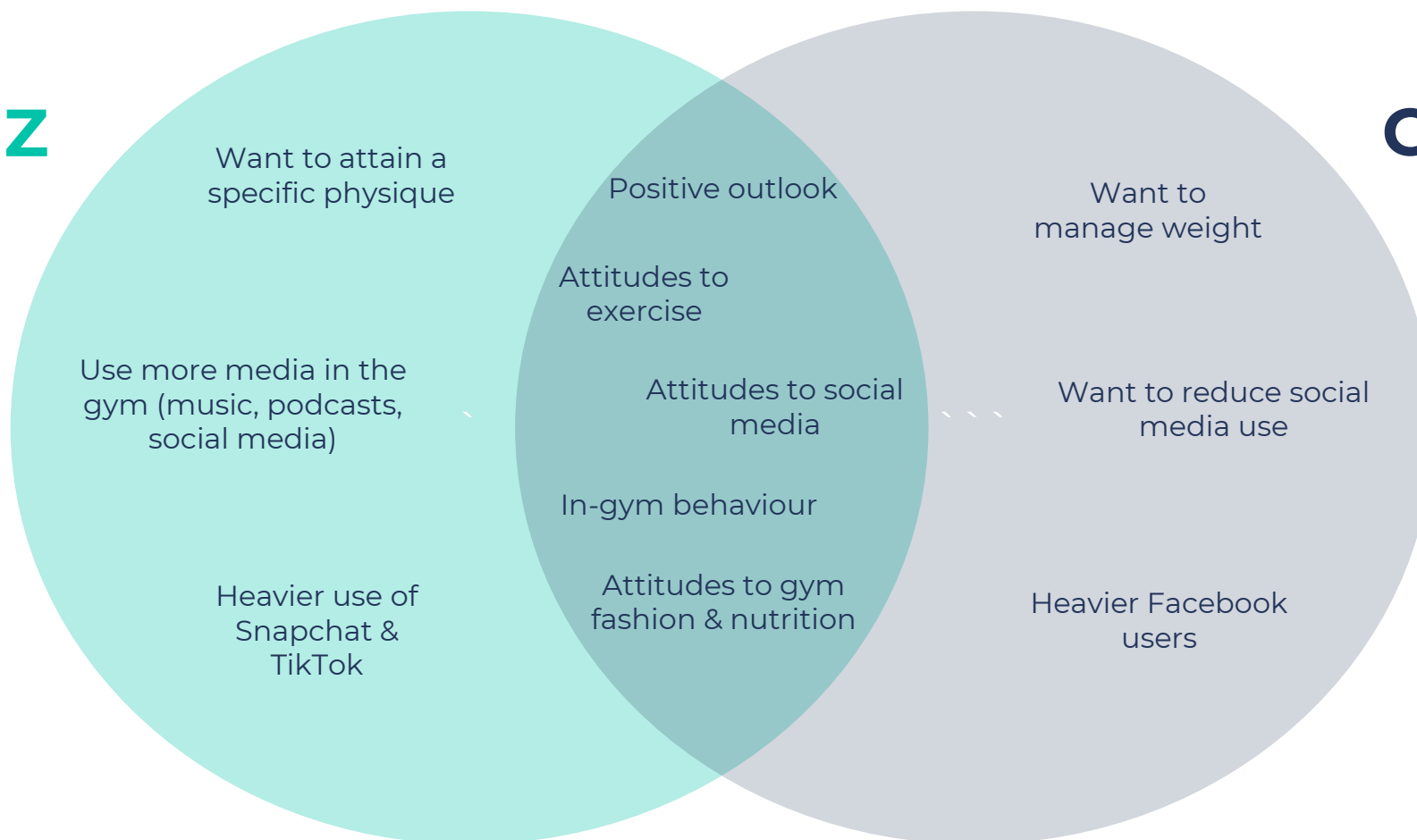
GYM M



GYM Z VS GYM M

When it comes down to those who spend time in the gym, Gym Z and Millennials aren't as different as you first might think.

Gym Z



Gym M aka gym-going Millennials

GYM M IN THE GYM

Gym M report visiting the gym for health reasons at higher levels, perhaps because they're more aware of the aging process. They're also visiting the gym more to reduce stress, potentially more of an indicator of the stresses of increased age and responsibility.

However, when it comes to the main reasons for the generations visiting the gym, these are pretty in line regardless of age group.

