2024 Latin America Fitness Consumer Survey

Executive Summary

December 2024

HEALTH & FITNESS ASSOCIATION

FITNESS

About the Research

Background

The *2024 Latin America Fitness Consumer Survey* was conducted by J. Wallin Opinion Research on behalf of the Health & Fitness Association (HFA) and ABC Fitness.

This report provides a detailed examination of how physically active Latin Americans in select large metro areas integrate fitness into their daily routines, highlighting key trends in fitness facility usage, membership preferences, and the factors that drive engagement with structured exercise environments.

The full report provides valuable insights into the evolving behaviors of this highly engaged market, helping businesses and professionals navigate the current fitness landscape in Latin America.

Survey Methodology

Total sample: Latin Americans aged 18+in some of the region's largest metropolitan areas (n=3,699)

Core sample: Latin Americans aged 18+ in some of the region's largest metropolitan areas who exercise at least a few times per month (n=2,984). Spread across six key countries, including:

- Metro Brazil (n=814)
- Metro Mexico (n=900)
- Buenos Aires, Argentina (n=300)
- Bogota & Medellin, Colombia (n=500)
- Lima, Peru (n=230)
- Santiago, Chile (n=240)

Dates in Field: September 18 – Tuesday, September 24, 2024

Mode: Online

Margin of Error: +/-1.8% (95% confidence interval). The MoE is higher for subgroups.

Executive summary

Findings among physically active consumer in some of Latin America’s largest metro areas

Exercise enthusiasts

Latin America’s large metro-areas represent a robust fitness market with continued growth potential and opportunities for businesses, investors and fitness professionals.

Fitness facility first

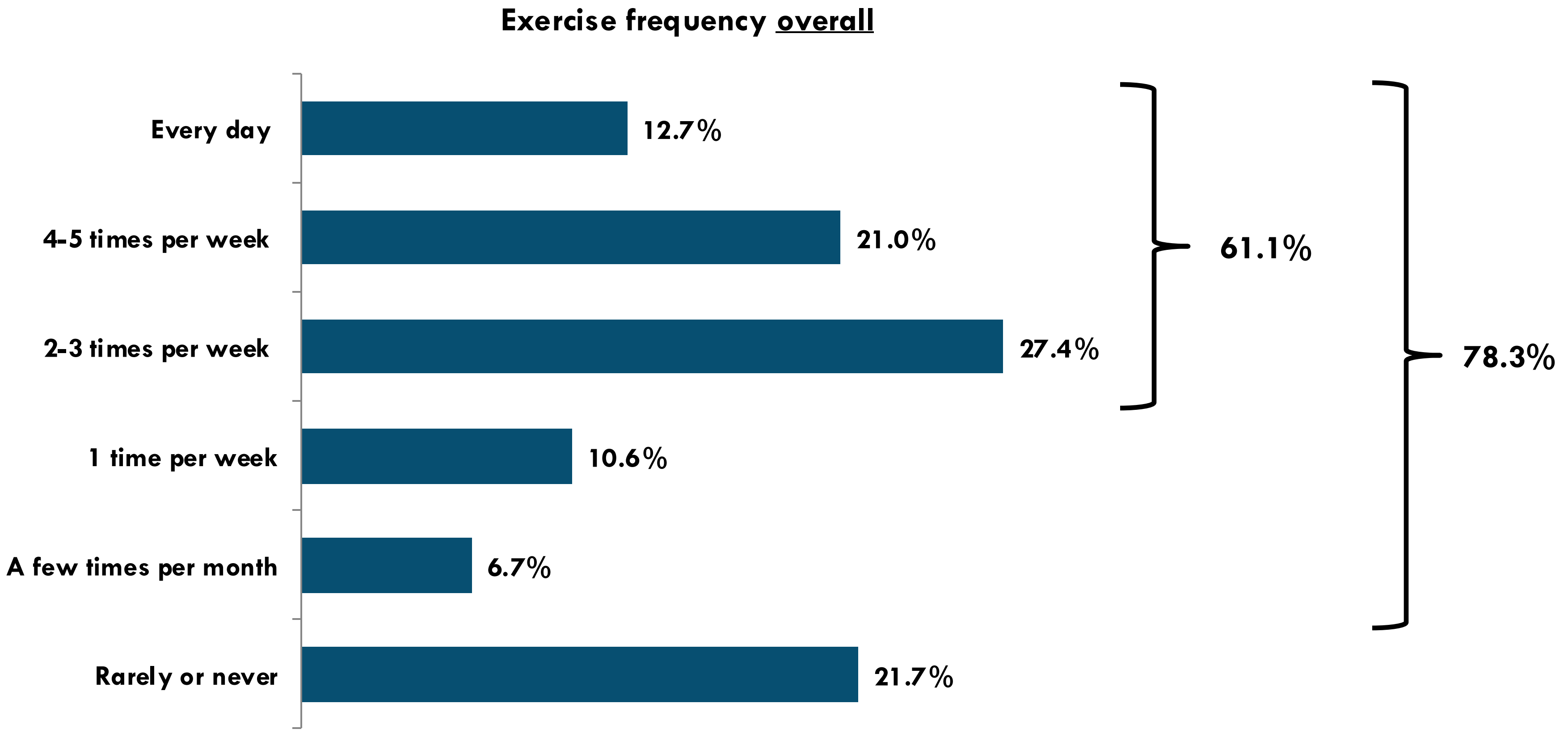
Health and fitness facilities are central to the way physically active consumer in some of the largest Latin American metro-areas exercise.

As demand for structured exercise and fitness facilities grows, a majority of those who were never members are likely to join a fitness facility in the next 12 months.

Holistic approach

Active consumers emphasize both physical and mental well-being as primary goals for exercising, with many citing overall health improvement and enhanced mental wellness as key motivators for maintaining an active lifestyle.

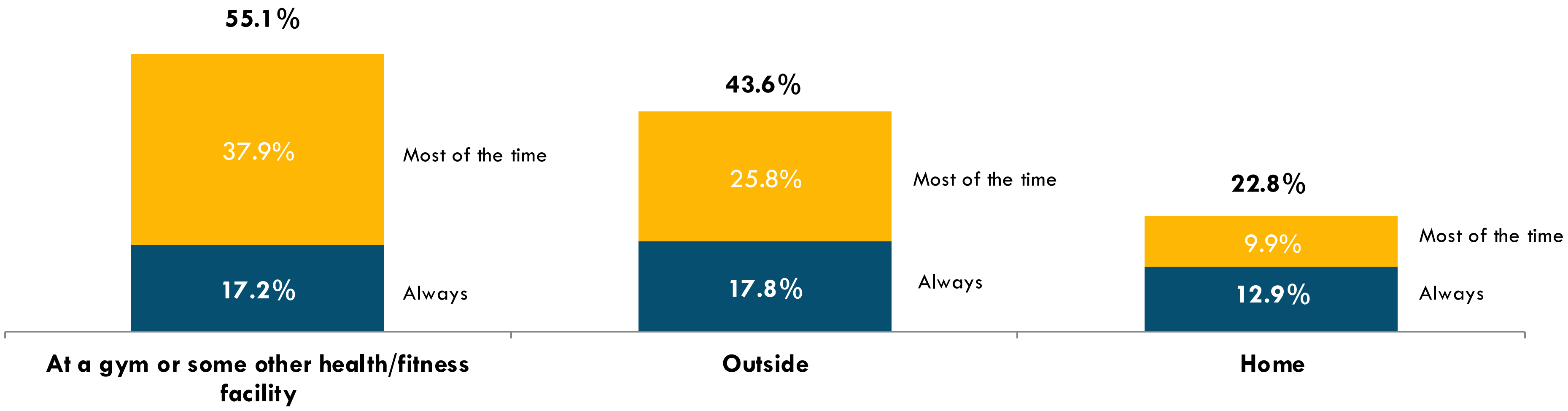
Most Latin Americans in major metro areas exercise multiple times per week, 78% at least several times monthly



Base: Among consumers in major Latin American metro areas (n=3,699)
Questions (combined): Which of the following best describes how often you exercise in a gym, fitness facility, studio class or with a personal trainer? Which of the following best describes how often you exercise at home or outside?

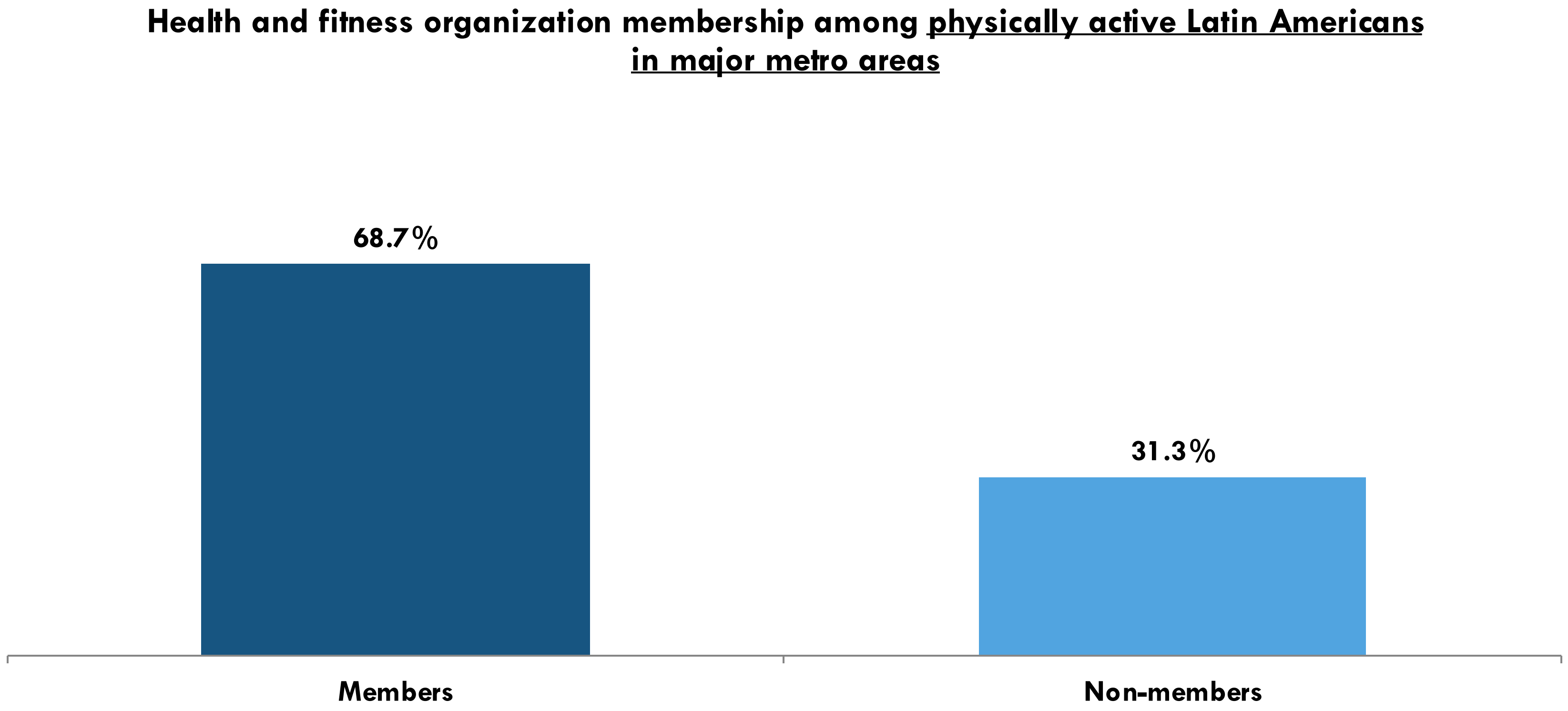
The majority uses gyms or other fitness facilities as their primary exercise location

Exercise by location among physically active Latin Americans in major metro areas



Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: About how often do you exercise at a gym or other health/fitness facility, as opposed to exercising outside or at home?

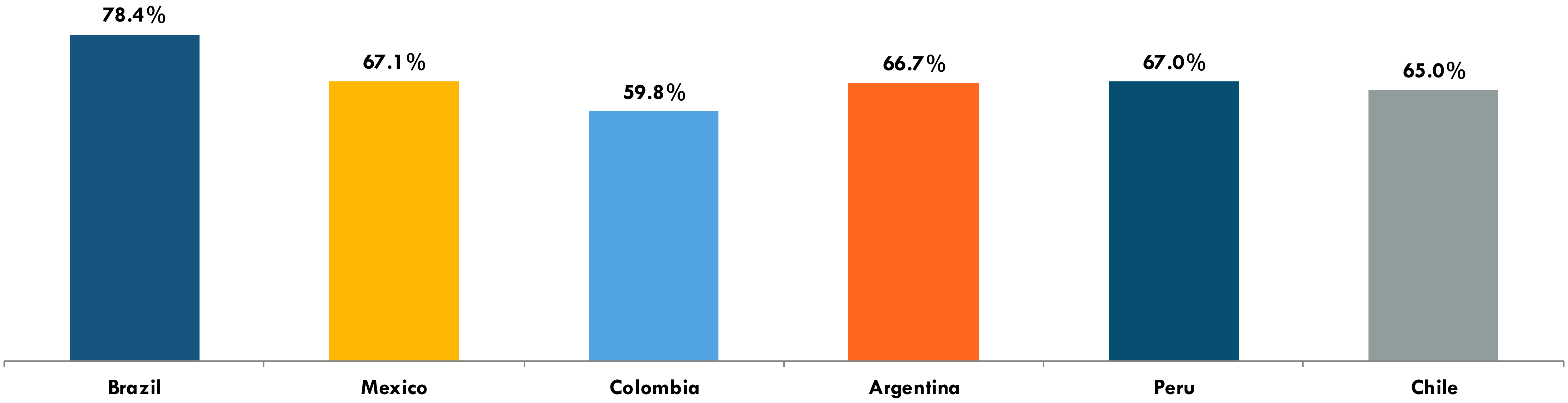
69% of physically active urban Latin Americans belong to a health or fitness organization



Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: Are you currently a member of a health or fitness organization or facility that provides the opportunity to exercise? This includes gyms, health clubs, fitness studios, community centers, religious facilities, workplace gyms, hospital fitness centers, or similar organizations.

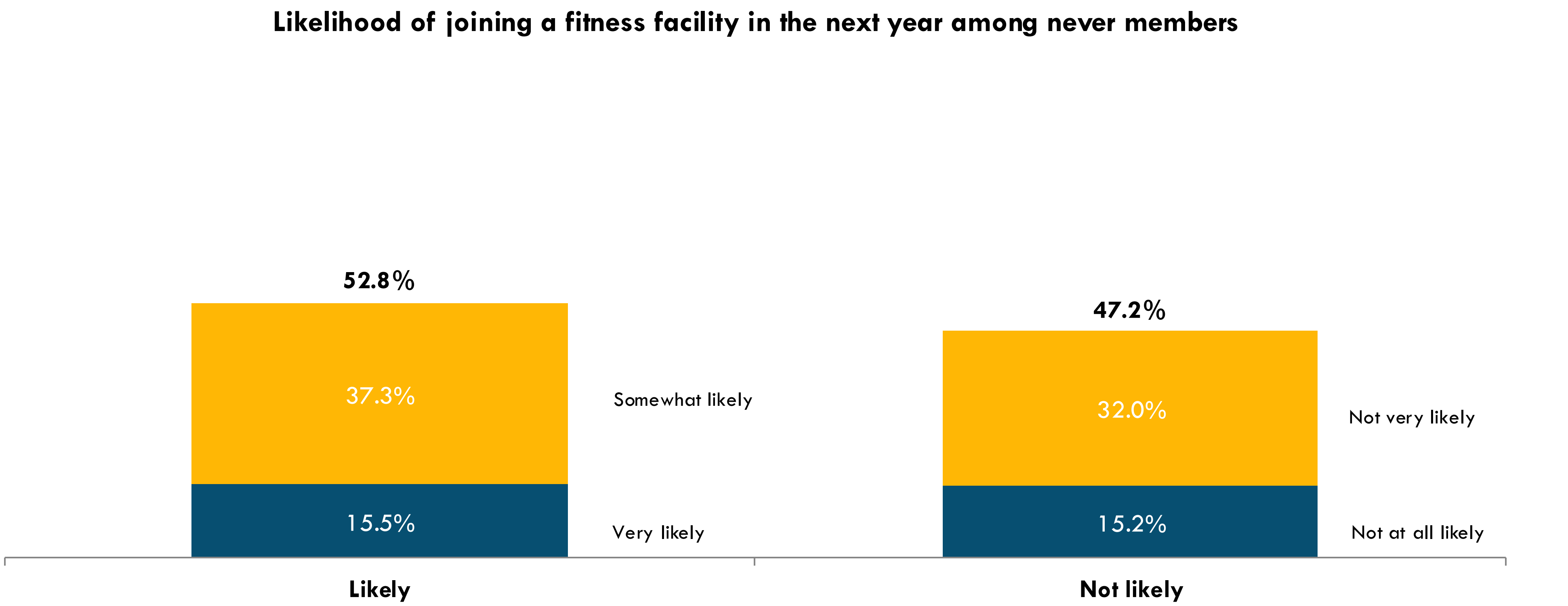
Nearly 8-in-10 physically active urban Brazilians are members

Health and fitness organization membership among <u>physically active Latin Americans in major metro areas</u>



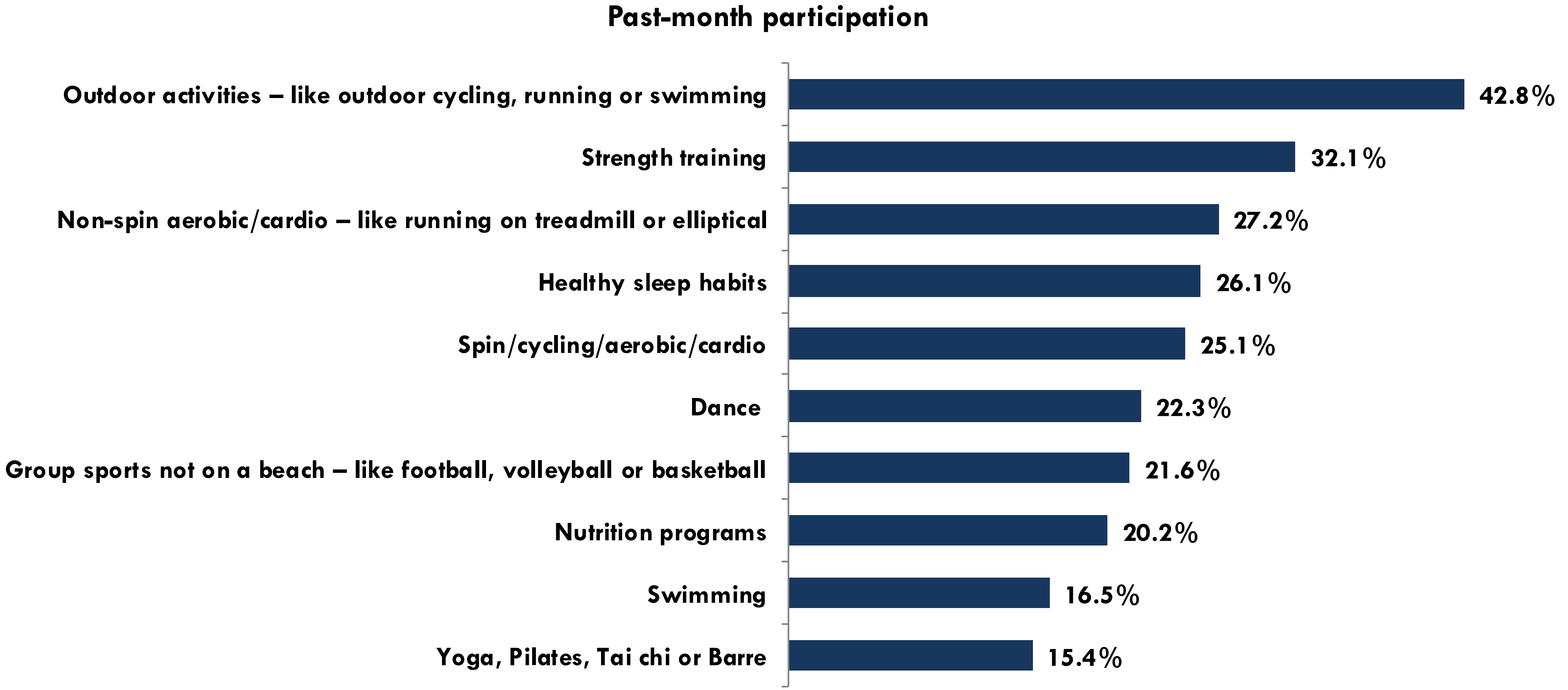
Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: Are you currently a member of a health or fitness organization or facility that provides the opportunity to exercise? This includes gyms, health clubs, fitness studios, community centers, religious facilities, workplace gyms, hospital fitness centers, or similar organizations.

Most non-members are likely to join a fitness organization in the next year



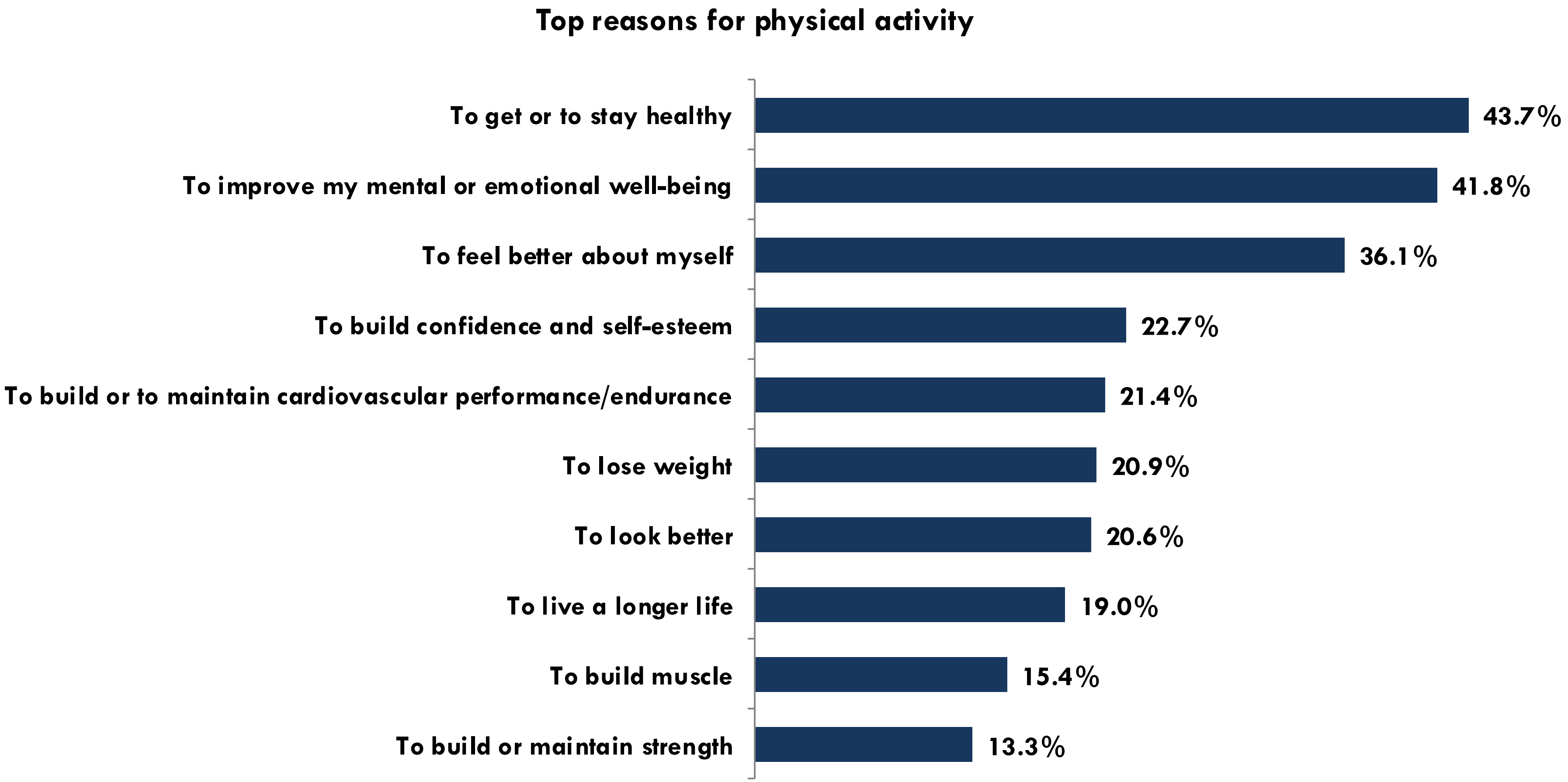
Base: Among physically active consumers in major Latin American metro areas who were never members of a health or fitness organization or facility (n=316)
Question: How likely would you be to join a health or fitness organization such as a gym, studio or some other similar exercise facility within the next twelve months?

Outdoor cardio, strength training were the leading exercise or wellness routines in the past month



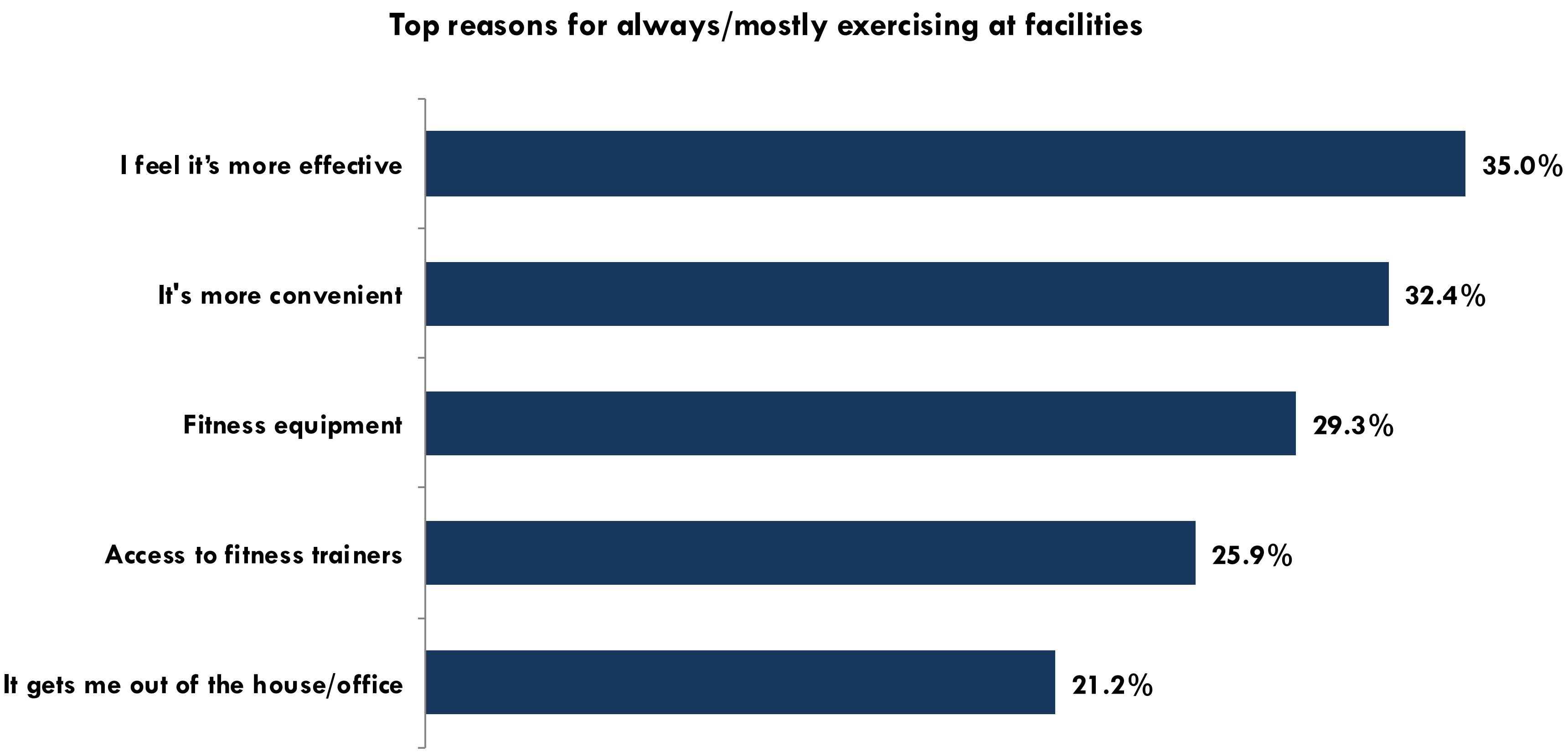
Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: What kinds of exercise or wellness routines have you engaged in over the past month?

General health and well-being, along with self-esteem, are top motivations for staying active



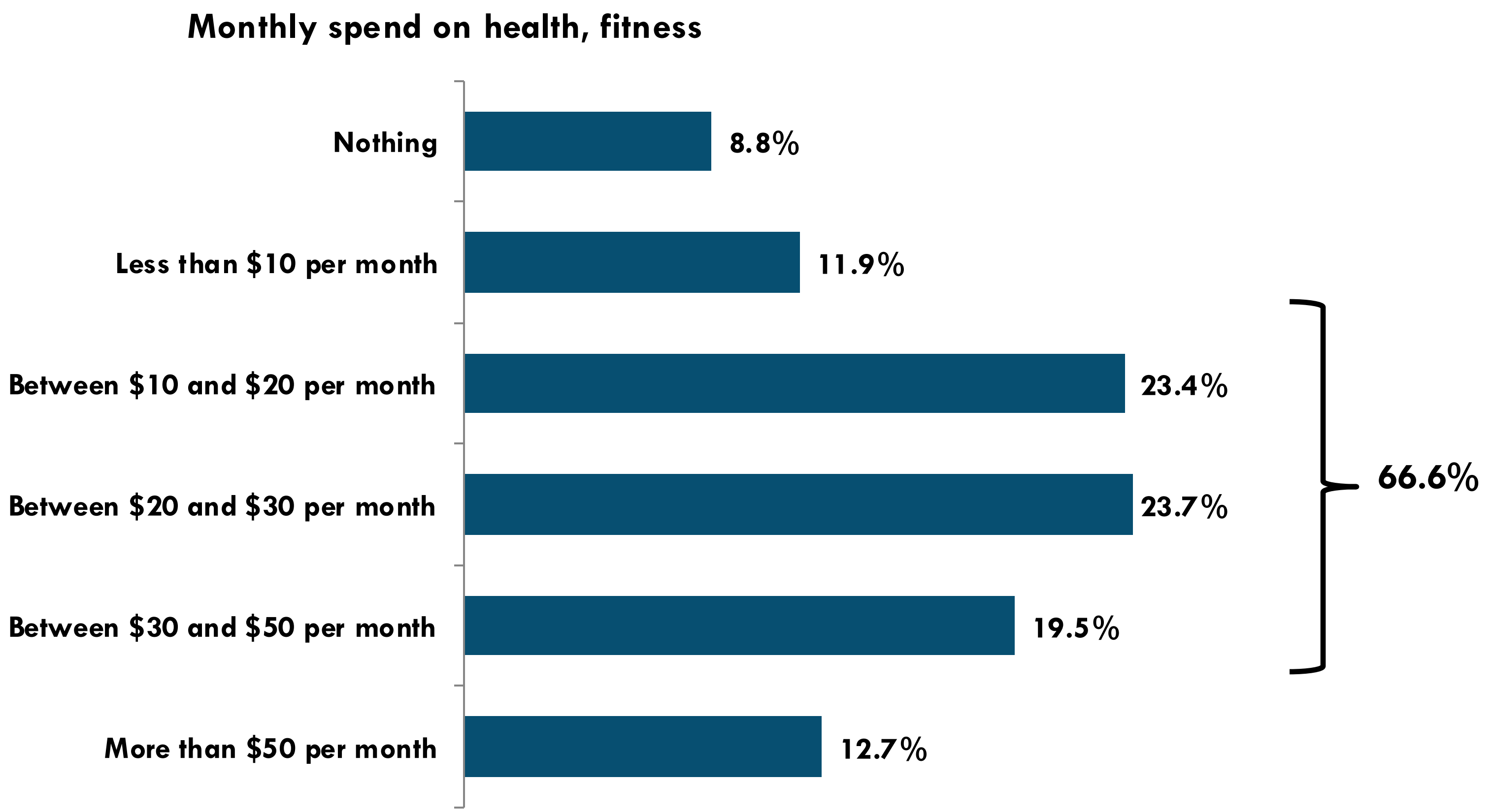
Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: Which of the following best describes your personal goals that motivate you to be physically active? Choose up to three.

Efficacy, convenience and equipment are top reasons for preferring fitness facilities



Base: Among physically active metro-region Latin American Consumers who choose "mostly or always" exercise at a gym or some other facility (n=1,644)
Question: Which of the following reasons best describes why you exercise at a gym or other facility? Choose up to three.

Two-thirds spend the equivalent of $10-$50 per month on health and fitness*



*Respondents were shown response options in local currencies.
Base: Among physically active consumers in major Latin American metro areas (n=2,984)
Question: Which of the following best describes how much you spend every month on your health and wellness routines, including equipment, training, facility memberships and other costs?

Implications for the Latin American Fitness Market

The *2024 Latin American Fitness Consumer Survey* underscores the importance of health and fitness across the region, where consumers prioritize fitness facilities.

To succeed in this dynamic market, fitness businesses must develop a deep understanding of local consumer behaviors and preferences. Key strategies include offering training programs that emphasize both mental and physical well-being, meeting the holistic needs of consumers. Businesses should also consider investing in equipment and spaces for outdoor activities, reflecting the region's affinity for diverse fitness experiences.

Want to learn more?

Contact the Health & Fitness Association to access the full results from the *2024 Latin America Fitness Consumer Survey,* including information on:

- Exercise habits and preferences
- Motivations
- Memberships
- Non-memberships
- Mobile app and device usage
- Demographic breakdowns by market, gender, age group, education, income level, and more

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