BrandMapp survey shows that 75% of the SA middle class is in pretty good health!

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Two years into a global pandemic that targets people with vulnerable health and 'co-morbidities', there has arguably never been a greater emphasis on the value of a healthy lifestyle. However, lockdowns, social distancing and other protocols have seriously curbed people's abilities to routinely go to gym, and to participate in the sports and leisure activities that keep them physically active on a regular basis.

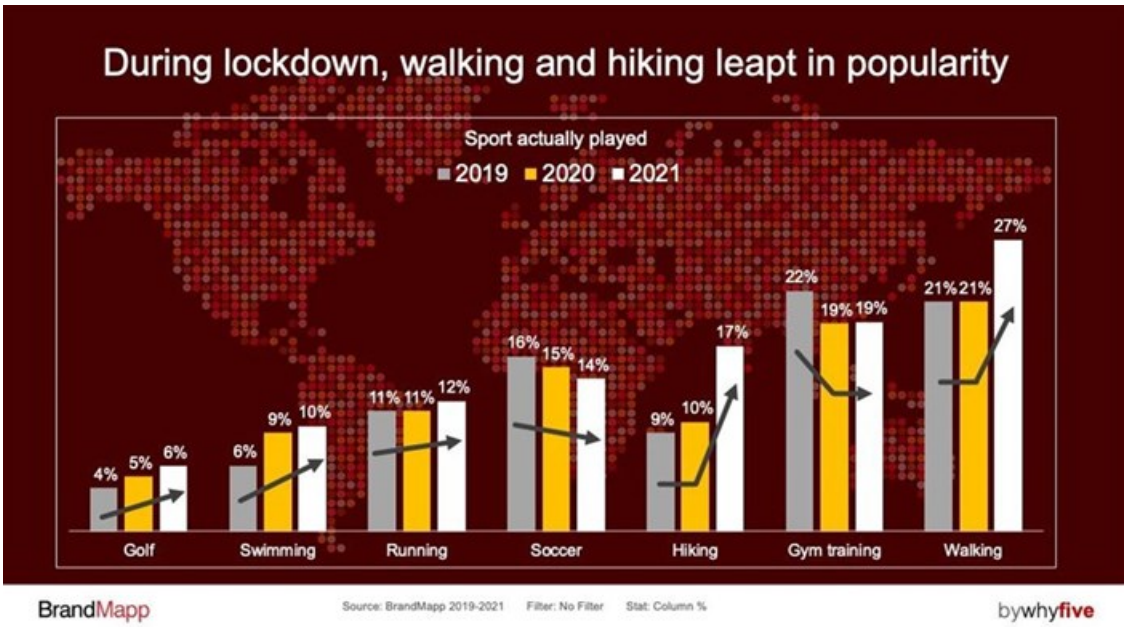


In South Africa, as was the case globally, gym memberships crashed, there were widespread closures and resultant job losses in the fitness industry. For every action there's an opposite reaction, however, and it also appears that sales of home gym equipment, for example, rocketed as people took to online fitness training and classes. At the same time, many people simplified their exercise routines: they walked out the door, literally!

BrandMapp, the country's largest, most comprehensive survey of middle-income South Africans has uniquely captured the Covid-era routines and opinions of South Africans living in households with a R10,000+ monthly income. Brandon de Kock, BrandMapp director of storytelling says, "Since we started measuring the lifestyle of middle-class-and-up South Africans, the gym has always played a significant role in the pursuit of healthier living. Pre-pandemic, in 2019, we measured 31% of adults being 'interested in gym' with 22% actually partaking in gym activity. We also found that 31% of people didn't do any exercise. Fast-forward to the beginning of 2021, and we found 26% of adults said they were 'interested in gym' with just 19% actually taking part. However, the percentage of adults who say they do not do any exercise dropped to 26%. First of all, that's interesting because for 75% of adults to say they do exercise is not a bad result! But from a gym perspective, what we can say is that in the Covid-era, we've seen a noticeable increase in the number of people actually exercising, but a drop in the number of people going to the gym."

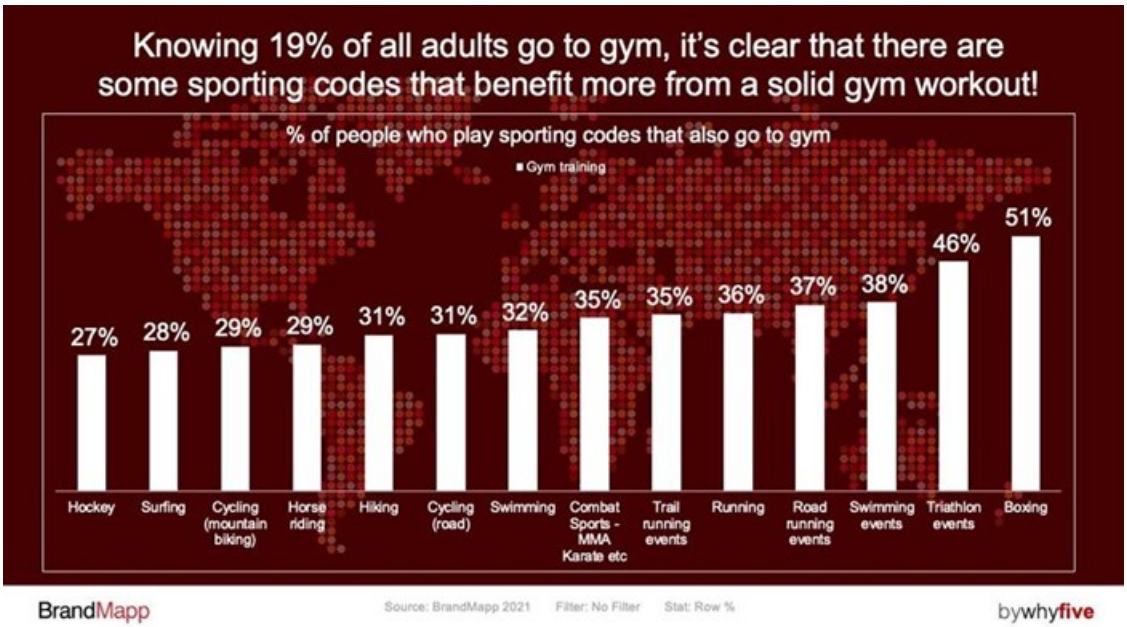
And these changing habits could well persist. De Kock continues: "This data reveals a 'Covid moment' where we wanted to stay fit and exercise in some way. Adding to the challenge for gyms was that we were already in an economic downturn when Covid hit and many mid-income adults took an economic beating. It stands to reason that a monthly gym contract

would be easy to live without, even temporarily, if you're trying to trim down a household budget. And you can replace it with free physical activities, such as walking out the front door into the sunshine or hiking in the fresh air."



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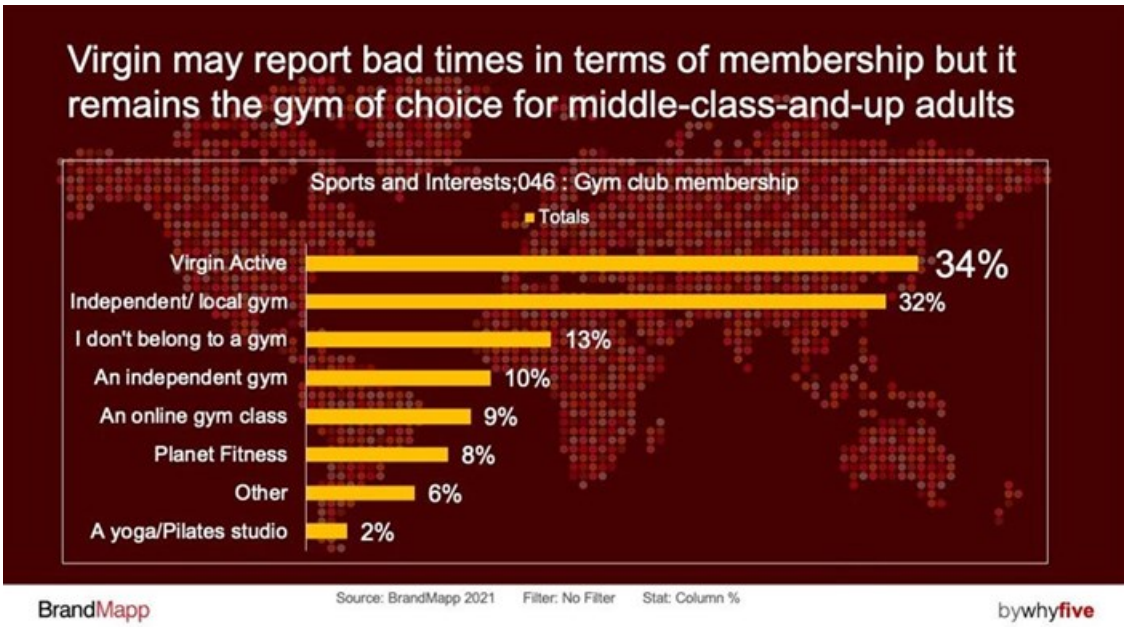
BrandMapp's trended view of the active sports undertaken in 2021, shows clearly how walking and hiking leapt in popularity. De Kock says: "Gym training certainly took a bit of a knock two years ago and hasn't bounced back up. And there's also been a lot of noise in the media about personal gym equipment selling like hotcakes during lockdown, so there's a good chance that working out solo at home rose sharply over the past three years. It's fun to see that golf, which allows for more social distancing and a smaller gathering than say soccer, has been on the rise during Covid. We know from recorded rounds that the sport got a bit of an unexpected lift when courses were opened during the lockdown. This is another indication that mid-income South Africans were open to what was available during Covid in order to maintain their physical activity."



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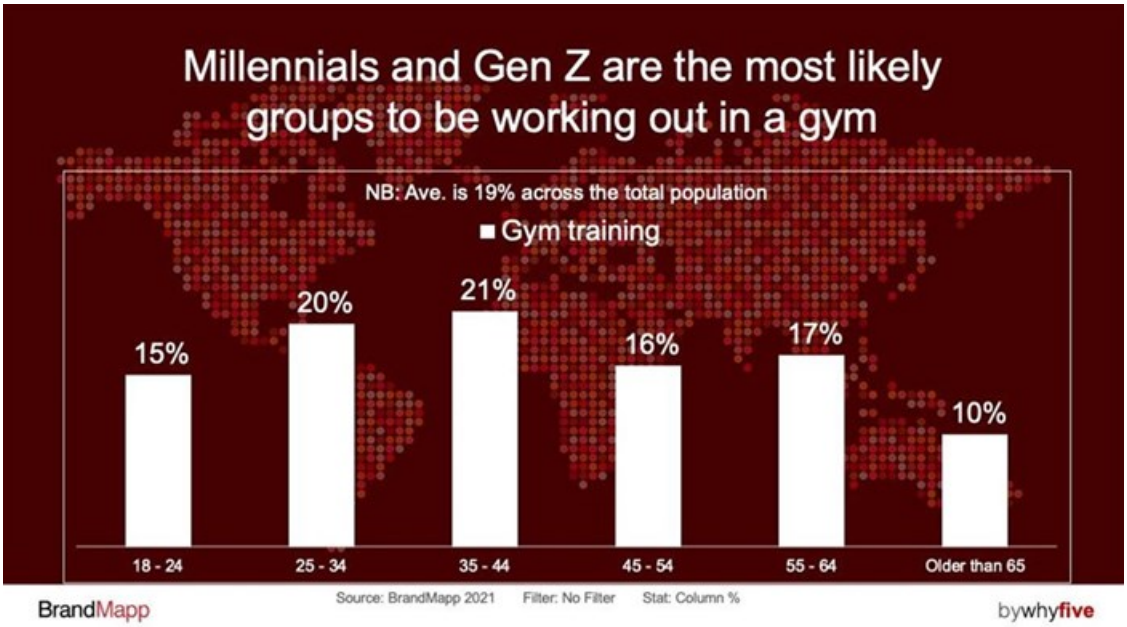
That said, it's not as if gym training has fallen completely off the radar, and for good reason. As De Kock points out, we are a relatively active society and there are many South Africans who commonly participate in a number of sports and fitness activities. He explains that "when you think about it, there are a lot of sports that rely on participants who want to perform at a high level having properly structured gym routines that will enhance their conditioning. So, we see that while only 19% of

mid-income South Africans go to gym, it is when you look at runners, swimmers, cyclists and those involved in niche activities like combat sports, that percentage increases dramatically. So, in many ways, our gym industry relies on there being a robust sporting culture and unfettered sporting environment in the country."



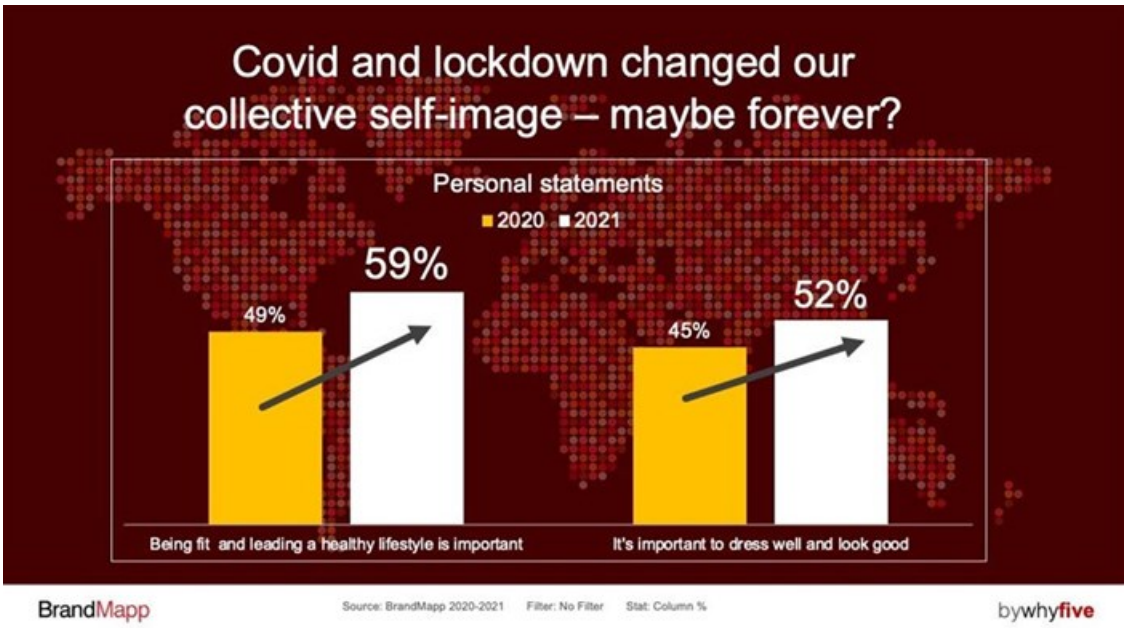
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Drilling down into the details of gym membership over 2021, we can see that despite Virgin Active losing members across its worldwide markets during the Covid-era, it remains the leading gym brand in the country, claiming 34% of gym memberships. "However," De Kock says, "It should be noted that together, the independent and private gym operators dominate with a combined 42% of the market."



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De Kock says: "The age continuum of South African gym-goers is interesting because it looks like gym training takes a pre- and post-millennial shape. No doubt relying on the physical advantages of youth, and also hampered by lower incomes, our youngest generation is less likely to be found in the gym than their ageing Gen X and boomer counterparts!"



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Taking into consideration the wide survey of personal statements provided by the BrandMapp respondents, De Kock also looks at the Covid-era impacts on our self-image, or sense of self. He says: “We saw a 10% increase in people saying that they believe that being fit and leading a healthy lifestyle is important, and a 7% increase in agreement with the statement that ‘it is important to dress well and look good’. These statements also play into the exercise trend. So why the spikes in these particular opinions during Covid? I think part of it is that we all had a lot more time to look at ourselves in the mirror – literally and figuratively! We’ve had time to reflect on being better human beings, our lives have been fundamentally disrupted and we’ve had a moment to reflect on what’s really important to us in life. It’s clear that being fit and healthy is one of those things. Covid has been an exceptional blow to the health of our nation, but perhaps it’s also triggered a greater individual appreciation of the value of good health. So, as we emerge into a new consumer reality, let’s hope this trend continues because when you think about it, the health of the middle-class is not just relevant to the fitness industry, but to the wide range of interconnected industries from government and corporate health sectors and health insurance, to the overall sports, sports nutrition, sporting goods and apparel industries.”

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