



Can you guess the

# Healthiest City of 2023?

Nº 1

# San Francisco, CA

This Northern California metro jumped up 5 spots from last year and ranks highly across many dimensions of wellness.

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San Franciscans spend the 3rd-highest amount on fitness, beauty, and wellness in the US—on average, \$331 each month.

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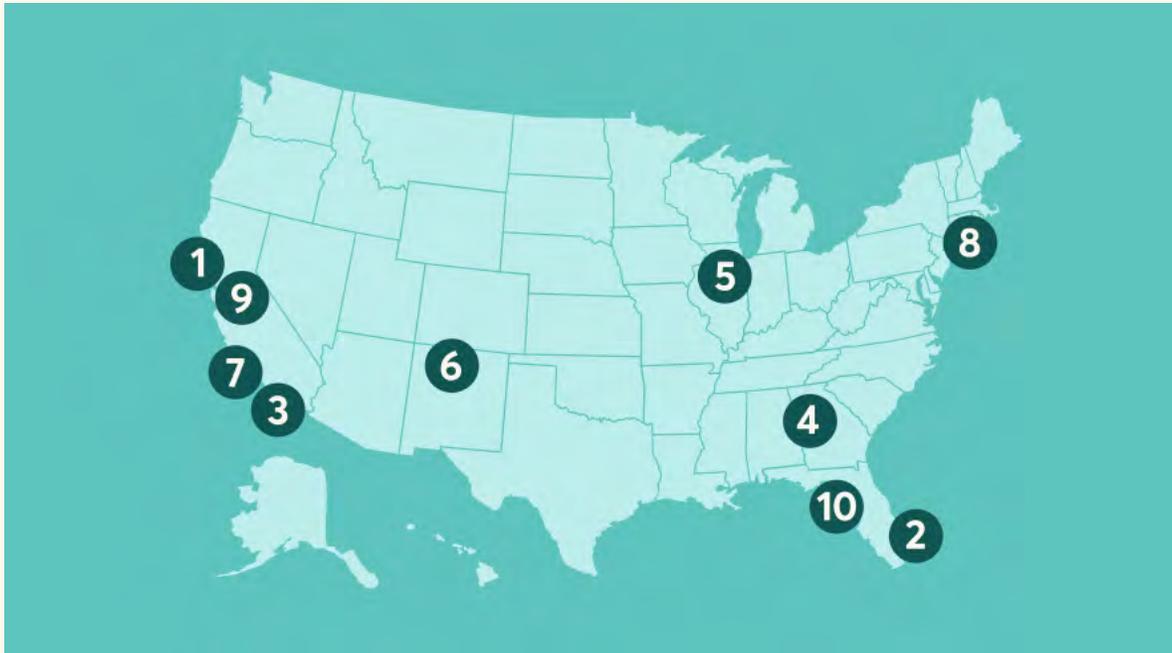
More than half of residents exercise 90 minutes or more per week, with the most popular workout being yoga.

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SF also has a high percentage of residents (55%) who get 7-8 hours of sleep every night and the highest number of non-smokers in the US.



# Top 10 Healthiest Cities in America



1. San Francisco, CA
2. Miami, FL
3. San Diego, CA
4. Atlanta, GA
5. Chicago, IL
6. Albuquerque, NM
7. Los Angeles, CA
8. New York, NY
9. Oakland, CA
10. Tampa, FL

*\*All data is out of the 50 most populous cities in the US.*

# The 2023 Wellness Index

Exclusive Mindbody and ClassPass  
data gathered to help you thrive

# Research you can't get anywhere else

We keep you up-to-date on what's happening in the world of wellness by conducting one of the industry's most comprehensive research studies: our annual Wellness Index.

This year, we surveyed **17,475 US adults** to find out how their relationship with wellness continues to evolve—and what that means for the year ahead.



# High-level data you should know

Consumers are engaging with fitness and wellness in a range of ways

# A renewed focus on wellness

**78%** of consumers say wellness is more important than ever

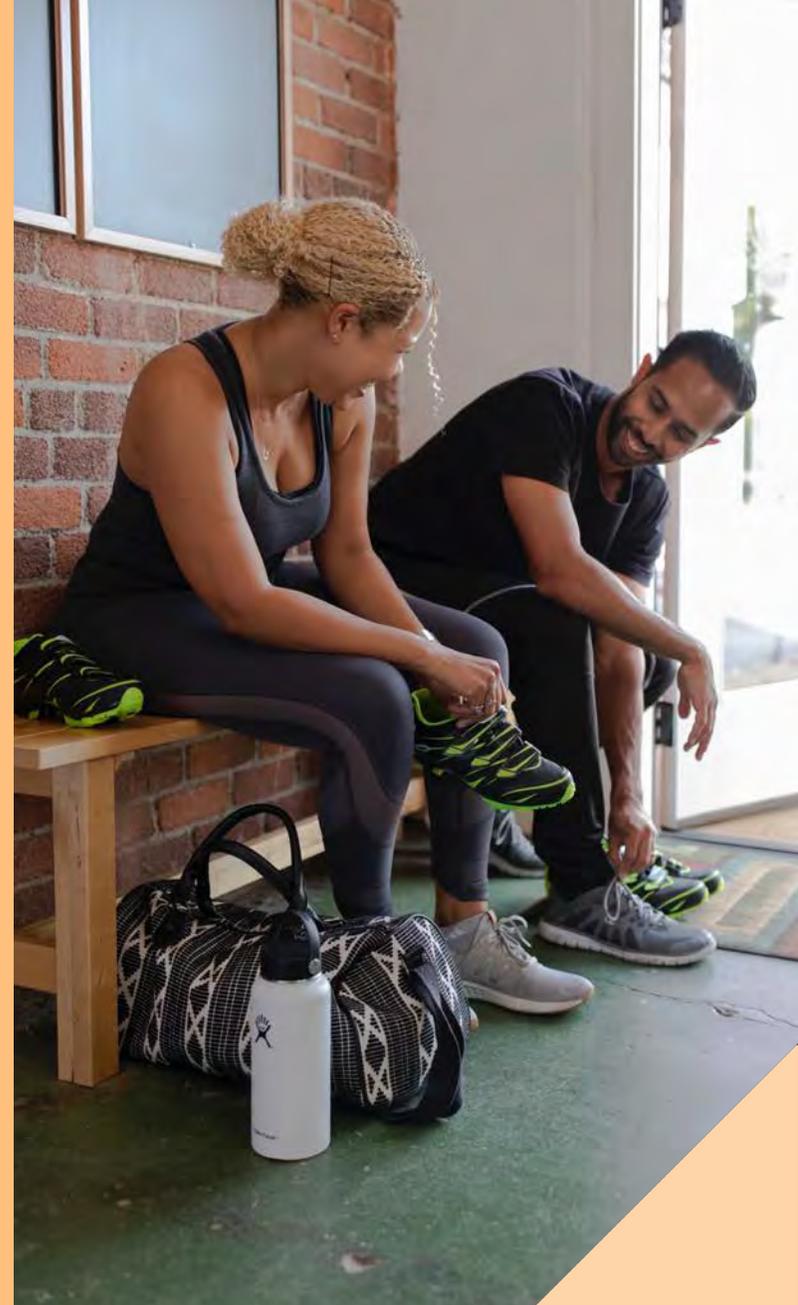
**64%** say wellness is more important than other leisure expenses

**40%** say they use physical activity to help support their mental well-being



# The definition of wellness is evolving

Wellness now encompasses more than just being in shape. It spans mental, physical, and spiritual dimensions—**and consumers are prioritizing mental wellness above them all.**



# Why people are more focused on health & wellness

**#1**

I want to improve my health

**#2**

I want to live a long and healthy life

**#3**

I want to be healthy so I can focus on other things  
(e.g., family, hobbies, etc.)



# The motivation for fitness has also changed

**2021**

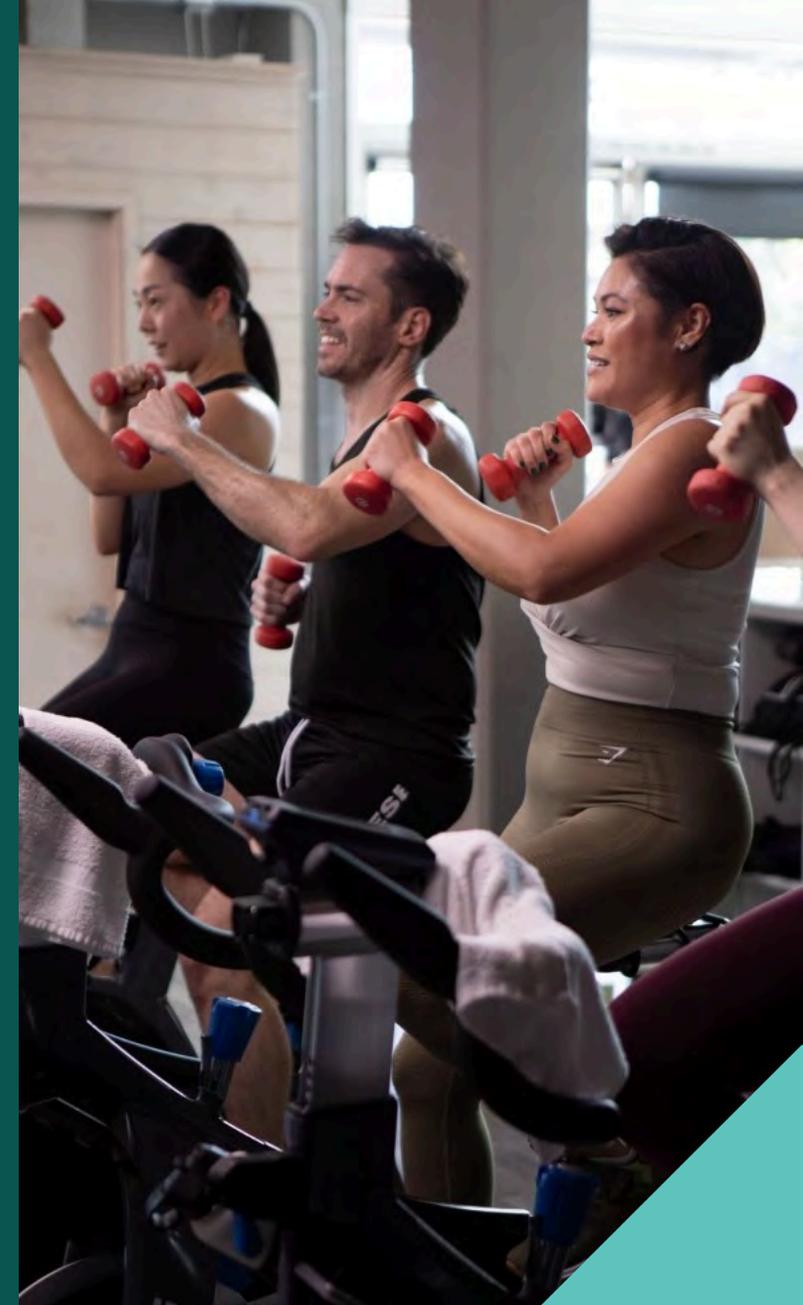
I want to control my weight

**2022**

I want to reduce stress

**2023**

I want to live a long & healthy life



# Increased fitness/wellness bookings

Fitness reservations increased **95%** from 2021 and wellness reservations increased by **62%**

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For the first time since 2019, usage spiked from December to January (50%), showing a **resurgence of in-person wellness**



# Why people are again focusing on in-person fitness

## Motivation:

**81%** of people say they push themselves harder in class than they do on their own

## Instructors:

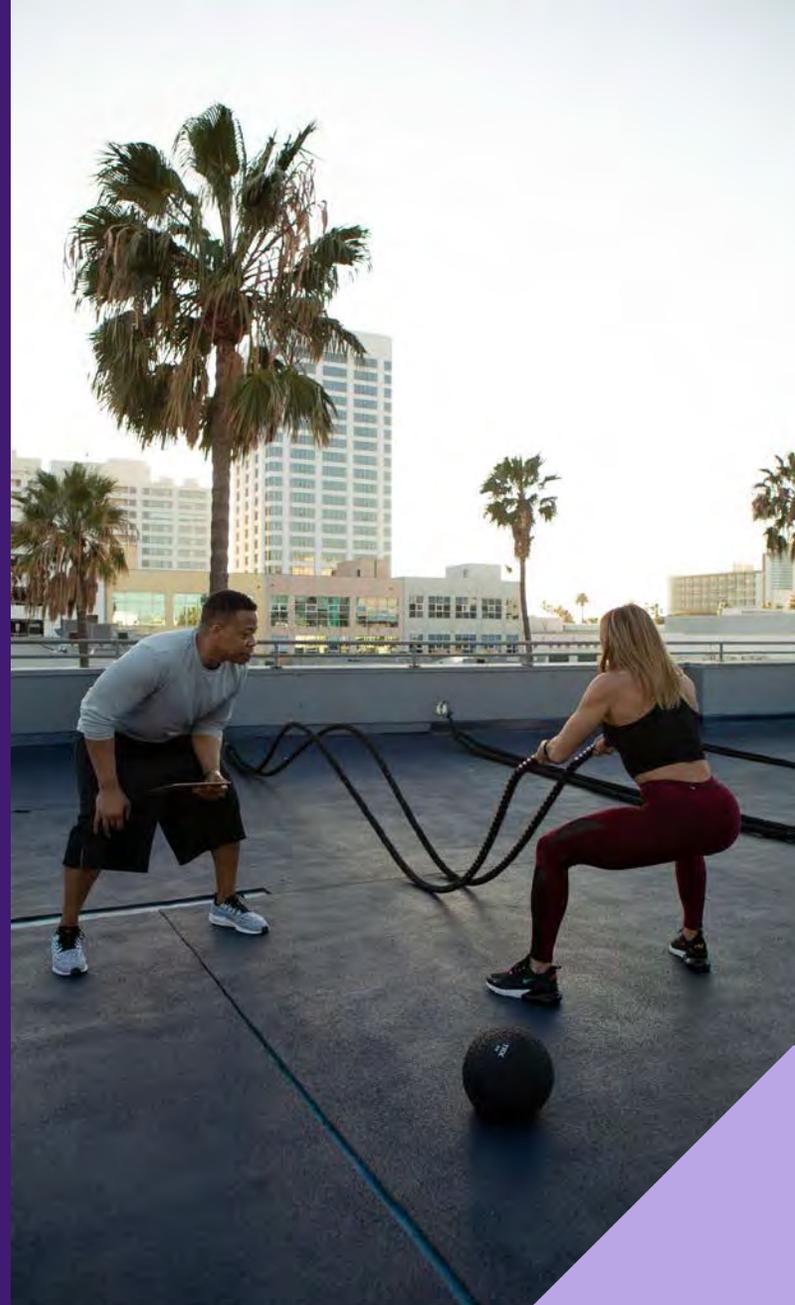
**74%** prefer to have an instructor's direction when working out

## Accountability:

**67%** say in-studio classes make it easier to work out regularly and keep up a routine

## Equipment:

**67%** cite access to equipment as one of the main reasons they're heading back to class



# What's next?

And how can fitness businesses take advantage of consumer trends?

TREND #1

# Strength in numbers

The rise of the  
wellness collective

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43% of consumers say  
community is a very important  
part of wellness experiences



## TREND #1

# Strength in numbers

Wellness businesses have become the quintessential "third place"

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More than 1/3 of consumers are likely to choose wellness businesses well known for their community-building

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Nearly a quarter say they're more focused on their health & wellness to feel connected to others

## Key business takeaways:

- Community is more important than ever.
- Facilitate connection with spaces for members to gather in your facility, social events, and partner-based challenges.

TREND #2

# Big female energy

Men work out more, but it's the year of the woman

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Men are more satisfied with their level of fitness than women

39% of women say they prefer women-only gyms or fitness studios



## TREND #2

# Big female energy

35% of women 18-50 structure their workouts based on their menstrual cycle

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The number of women who say they're too intimidated to work out at a gym/studio has decreased since last year

## Key business takeaways:

- Add female-centric workshops (like how to cycle sync your workouts).
- Offer pre & postnatal classes.
- Add more female instructors to your schedule.
- Provide women-only classes.

TREND #3

# Longevity wins

Choosing wellness practices  
for a longer life

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29% of consumers say they  
exercise to live a long and healthy life



## TREND #3

# Longevity wins

51% of consumers engage in movement that prepares the body for daily living

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Workout recovery is a priority—47% of Americans say practices like stretching and restorative yoga are very important

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26% practice biohacking for peak physical and mental performance

## Key business takeaways:

- Reinforce the connection between movement and long-term health in your marketing and education.
- Prioritize recovery services and/or partner with businesses that offer cryotherapy, ice plunges, etc.

TREND #4

# Introducing "Gen W"

The wellness generation

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Gen Z and millennials spend more on wellness than other generations



## TREND #4

# Introducing "Gen W"

In almost every way, Gen Z and millennials engage with wellness most

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More than a quarter say they're focused on wellness to feel connected to other people

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Gen Z consumers are most likely to say wellness benefits or perks are important when choosing an employer

## Key business takeaways:

- Younger generations see wellness as less of a "nice-to-have" and more as an essential part of daily life.
- Capitalize on these audiences with social media marketing and a strong referral program.

TREND #5

# The lowdown on low-impact

Strength training is still #1, but these  
low-impact workouts are on the rise

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33% of consumers prefer low  
intensity/impact training



## TREND #5

# The lowdown on low-impact

For the first time ever, stretching entered the top 10 and sculpt was the fastest-growing workout of 2022

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The average American fitness routine:

- 40% low-intensity training
- 25% moderate-intensity training
- 17% high-intensity training
- 19% recovery

## Key business takeaways:

- Add low-impact offerings and ways to promote recovery.
- This could include mobility and stretching classes, on-demand recovery workouts, or local partnerships.

# The big picture

- 78% of consumers say wellness is more important than ever
- Longer and healthier life is the key reason for fitness
- Consumers engage with in-person fitness for:
  - *Motivation, Accountability, Instructors, Equipment*
- Trends to leverage in your business:
  - *Community, Female-focused modalities, Longevity, Younger generations, Low-impact*



