



04/03/2025

# REPORT

**Branded to Perform: What Moves Brazil's Fitness Generation?**



# AUDIENCE

## Demographics

Brazil, Age 18 to 35

## Custom Screening

Which of the following best describes how you stay active in your daily life?

**Qualified:** I participate in sports or structured fitness activities regularly.

**Unqualified:** I try to stay active through everyday movement (e.g., walking, commuting, housework) but don't follow a workout routine. , I focus more on a healthy diet rather than physical activity. , I don't really think about staying active or exercising.....

## Custom Screening 2

In the past 6 months, have you purchased any sportswear or fitness-related products?

**Qualified:** Yes

**Unqualified:** No, I'm not sure.....

## Custom Screening 3

This survey includes video responses as short video clips. These clips from your recorded videos may be shown as examples on our website, social media accounts (LinkedIn and Twitter), and during marketing events. Do you agree to continue?

**Qualified:** Yes

**Unqualified:** No



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## OBJECTIVE

Explore the motivations, preferences, and spending behaviors of 18 to 35-year-olds in Brazil regarding their regular sports and structured fitness activities, including the factors influencing their choice of sport or fitness routine, their commitment to fitness memberships, and their investment in sportswear and equipment.

## BURNING QUESTION

How do you prioritize features and quality when purchasing sportswear and fitness-related products, and what is your average budget for these items?



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## CHAT GUIDE

1. How often do you engage in sports or fitness activities per week?

Answers: 1-2 times, 3-4 times, 5+ times

2. Would you describe yourself as:

Answers: A fitness enthusiast (regular, structured workouts), A casual participant (work out for fun or health), A competitive athlete (training with a goal)

3. What sports or fitness activities do you actively participate in?

4. What factors influence your choice of these sports or fitness activities?

5. Do you follow professional sports or athletes? If so, which ones? (Following on social media, attending in person, watching on TV, etc.)

6. Have you switched from one sport or fitness activity to another? Why?



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## CHAT GUIDE

7. How much do you typically spend per month on fitness-related expenses (including gym, gear, training, apps, and events)?

Answers: \$0–\$50, \$50–\$100, \$100–\$200, \$200+

8. Where do you prefer to purchase sports gear and equipment?

9. Do you own sports gear from multiple brands, or are you loyal to one brand? Why?

10. How do you decide it's time to invest in new sports gear?

11. Could you please share a screenshot or photo of the most recent sports gear or equipment you purchased?

12. Could you please rank the following options in order according to which factors influence your sportswear and equipment purchases from most significant to least?

Choices: Price, Performance and functionality, Sustainability and ethical production, Athlete endorsements, Fashion and trend appeal

13. Do you currently have a gym or fitness membership? If so, which type?



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## CHAT GUIDE

14. What would make you use your gym or fitness membership more?

15. Do you use any fitness or workout apps? If so, which ones?

16. Are you interested in fitness wearables (smartwatches, fitness bands, recovery trackers)? Why or why not?

17. If you could change one thing about the sports and fitness industry, what would it be?

18. What do you want to achieve in the next 3 years? Do you plan to participate in Marathons, specific running or other sports competitions, Triathlon, etc.?



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## AI SUMMARY

Individuals who are highly engaged in sports and fitness activities exhibit a strong commitment to maintaining an active lifestyle. They frequently participate in activities like weight training, running, soccer, swimming, Muay Thai, and various forms of cardio and martial arts, often working out 3-4 times to over 5 times per week. Describing themselves as fitness enthusiasts or competitive athletes, these individuals prioritize structured workouts that contribute to both their physical health and personal fulfillment.

Motivation for these participants is multifaceted, deeply rooted in aspirations for physical health improvements, mental well-being, and the achievement of personal goals such as body transformation, enhanced endurance, and competitive preparation for events like marathons and triathlons.

Social influences significantly bolster their commitment; encouragement from friends and family, as well as inspiration drawn from fitness influencers and professional athletes on platforms like Instagram, play a crucial role. By following these figures, participants find motivation to mirror successful routines and attain similar achievements, which helps them stay dedicated to their fitness journeys.

In terms of consumer behavior, these fitness enthusiasts are willing to make substantial investments in their pursuits, with many spending over \$200 monthly on related expenses. This spending encompasses gym memberships, personal training sessions, nutritional supplements, sports gear, and event entry fees.





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## AI SUMMARY

When purchasing sportswear and equipment, they prioritize performance and functionality, considering factors like product quality, comfort, and technological advancements. While some display brand loyalty to companies like Adidas and Nike, others focus on variety and the specific qualities of products rather than brand names. Their purchasing preferences include both online and physical retail options, valuing the convenience and selection each provides. There is also a noticeable interest in integrating fitness technology, such as wearables that monitor health metrics and enhance workout efficiency, indicating a trend towards embracing innovation to support their active lifestyles.







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## KEY INSIGHTS

### Preference for Quality and Brand Loyalty

- Participants show a strong preference for high-quality sports gear, often associating quality with well-known brands like Adidas and Nike. Brand loyalty is prominent, with some individuals having used these brands since childhood, fostering a lifelong connection and trust in their products.
- Comfort, design innovation, and reliable performance are key factors that sustain their loyalty to these brands. While some participants are brand-focused, others prioritize the quality and functionality of the product over the brand name, owning gear from various brands that meet their standards.
- The decision to purchase new sports gear is influenced by factors such as wear and tear of existing equipment, technological advancements, and the introduction of new products that spark interest.
- Cost-benefit considerations, along with comfort and design, play significant roles in their purchasing decisions, highlighting a balance between brand loyalty and the pursuit of quality.

### Quotes:

"I think the brand is the most comfortable and has a good cost-benefit ratio."

Age 26, Female

"I only use Adidas and Nike, I have loved them since I was a child. They are part of my life."

Age 27, Male

"I have products from various brands because I am not attached to brands but to the quality of the product."

Age 34, Female

"I really like to shop both online and in physical stores, I usually buy from official websites like Adidas, and physical stores of reliable brands."

Age 25, Male

"I have a preferred brand because I already know the quality it has and I don't see the need to change it."

Age 30, Male





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## KEY INSIGHTS

### Social Influence and Professional Inspiration

- Social influences and professional inspiration play significant roles in shaping participants' fitness activities and goals.
- Many are motivated by athletes and fitness influencers they follow on social media platforms like Instagram and Facebook. These figures serve as role models, inspiring participants with their dedication, physiques, and training routines.
- The accessibility of athletes' and influencers' content allows participants to incorporate new exercises and maintain motivation.
- Family members and friends also contribute to their fitness journey, providing encouragement and companionship in activities like gym workouts and running.
- This blend of professional inspiration and personal support fosters a strong sense of community and motivation among participants, enhancing their commitment to fitness.

### Quotes:

"I research on social media. I follow the trend of sports on TV and sporting events."

Age 25, Male

"Yes, I do follow, I use Instagram and follow a lot of MMA fighters, like Poatan and Charles do Bronx. Their routine really motivates me to improve my physical conditioning."

Age 27, Male

"I follow fitness muses on Instagram. Like Luana Mendes, people who take bodybuilding as life."

Age 26, Female

"Social influences come a lot from the perfect bodies of other people on social media, the goals are created when I set my mind to having that type of body. Accessibility varies over time, it depends a lot on how I separate my social life from my work life. In the end, there is time left for everything I like."

Age 27, Male





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## KEY INSIGHTS

### Balancing Cost with Performance and Functionality

- When purchasing sportswear and equipment, participants emphasize the importance of balancing cost with performance and functionality. Many are willing to invest significant amounts in fitness-related expenses but remain conscious of obtaining value for their money.
- Price is a critical factor, influencing decisions alongside attributes like quality, durability, and comfort. Participants seek high-quality products that enhance their athletic performance without unnecessary expenditure.
- Many prioritize functionality and performance over price, believing that superior quality justifies the cost and leads to better training outcomes. Others conduct careful cost-benefit analyses before making purchases, ensuring the product meets their needs and is worth the investment.
- Ethical considerations, such as sustainability and responsible production, also influence participants' choices, reflecting a desire to support conscientious brands.

### Quotes:

"For example, if I am preparing for a race and I need a pair of shoes, I will choose one that gives me better performance"

Age 34, Female

"The gym costs 140, a personal trainer for weight training once a week is around 300, an online running coach is 120 per month, plus clothes and shoes that are not cheap, dietary supplements are around 300 per month."

Age 26, Female

"The price is an important factor when purchasing a product, I always pay attention to how much brands charge for their products."

Age 27, Male

"First the quality, and the usability, if I am going to use it frequently. If I am not going to use it frequently, I think a lot before."

Age 26, Female





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## KEY INSIGHTS

### Gym Membership Utilization Factors

- Respondents indicate that environmental factors such as air conditioning and the availability of new, technologically advanced equipment could increase their gym usage.
- Some respondents feel that their current gym setup is sufficient and do not see a need for improvements to increase their usage.
- Personal schedule and work-life balance are significant factors affecting gym usage, especially for those who are self-employed or have children.
- The availability of more technological devices and features that track workout progress, such as machines with activity logs and calorie counters, is seen as a potential motivator for increased gym usage.

### Quotes:

"The gym itself already works very well, but a place with air conditioning for a climate-controlled environment is very necessary in a gym."

Age 27, Male

"More schedule options, especially on holidays, and greater availability of technology keep me at the gym for a long time."

Age 25, Male

"I need to better organize my work routine so that I can train every day."

Age 34, Female

"I find equipment that helps count repetitions interesting. And that makes some movement different from most."

Age 26, Female

"Good to have dance, fights, good teachers, and equipment. Good service and a clean place are the main factors for me."

Age 28, Female





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## KEY INSIGHTS

### Desired Changes in the Sports and Fitness Industry

- Participants expressed a desire for greater inclusivity and accessibility in the sports and fitness industry, including more varied gym offerings, technological advancements, and better pricing.
- There is an interest in smart technology integration within fitness equipment and apparel to enhance workout experiences and health monitoring.
- The high cost of sports and fitness products, including supplements and gym memberships, is a barrier for many, suggesting a need for more affordable options.
- Respondents believe that the industry should focus on health and well-being over appearances and provide more opportunities for engagement, especially in underserved communities.

### Quotes:

"It would certainly change the values, it still becomes a bit expensive to be acquired by most amateur athletes."

Age 34, Female

"I would develop more technological equipment in a way that they are durable and help in the routine, both at home, doing physical exercises, or in gyms. Devices that are waterproof, sweat-resistant clothing, and products with high technology and durability."

Age 25, Male

"I would change people's perspective because it is much more about health than about bodies and appearances."

Age 34, Female

"I would make access to physical activity more accessible, especially in underserved communities."

Age 29, Female





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## KEY INSIGHTS

### Commitment to Fitness and Health Goals

- Participants demonstrate a profound commitment to their fitness and health goals, engaging in physical activities frequently, often five or more times a week.
- They consider themselves fitness enthusiasts or competitive athletes, motivated by aims such as improving physical appearance, enhancing mental health, boosting self-esteem, and preparing for future competitions.
- Activities range from weight training and running to swimming, martial arts, and team sports, with routines often structured with professional guidance.
- Many participants have set specific future objectives, like participating in marathons or triathlons, reflecting dedication to long-term fitness achievements.
- This commitment is sustained through disciplined training regimens, dietary considerations, and consistent motivation derived from personal progress and external inspirations.

### Quotes:

"When I wasn't into physical exercise, I used to feel a lot of pain from not moving and didn't usually have the energy to do everything I needed."

Age 25, Male

"I strive hard to always keep my diet healthy, to always stay on top of my exercises, my training, and to improve my performance and focus every day."

Age 34, Female

"Well, in three years I imagine myself running marathons, especially D&D marathons, which is something I've always wanted to do and I'm training for it, to complete the marathon of up to 40 kilometers. I really want to do more sports like jiu-jitsu, I admire martial arts a lot, so it's something I would like to do and obviously focus more on the gym."

Age 28, Female





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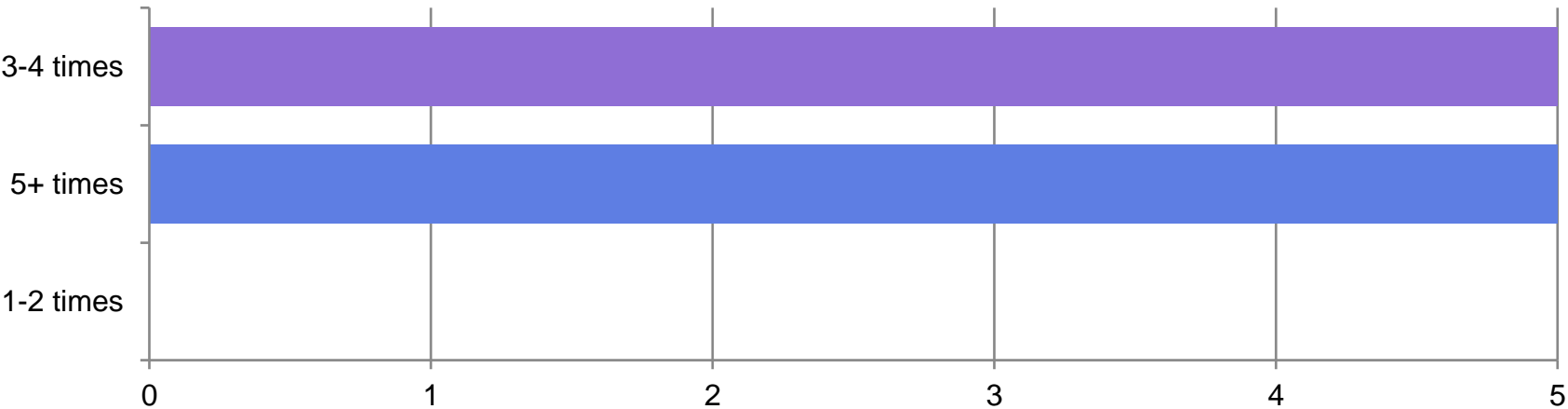
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## METRICS

How often do you engage in sports or fitness activities per week?





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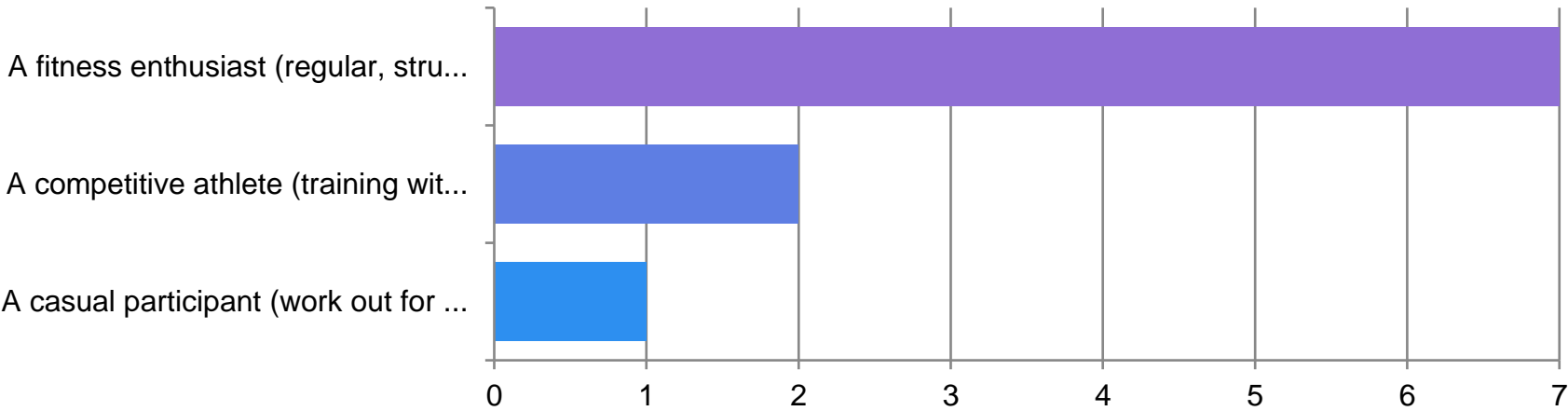
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## METRICS

Would you describe yourself as:







## AUDIENCE

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Brazil, Age 18 to 35

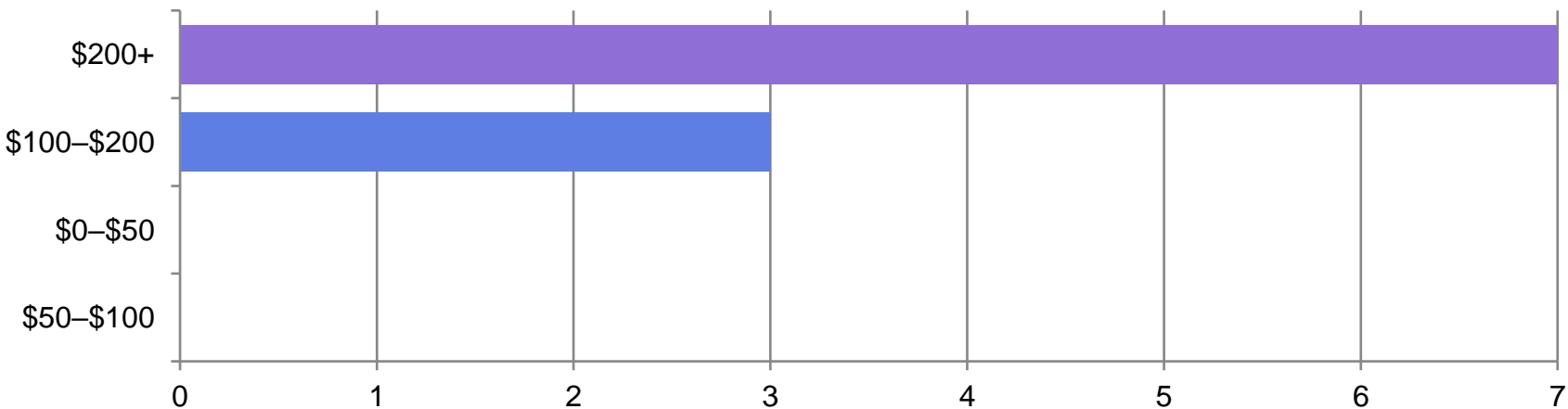
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## METRICS

How much do you typically spend per month on fitness-related expenses (including gym, gear, training, apps, and events)?





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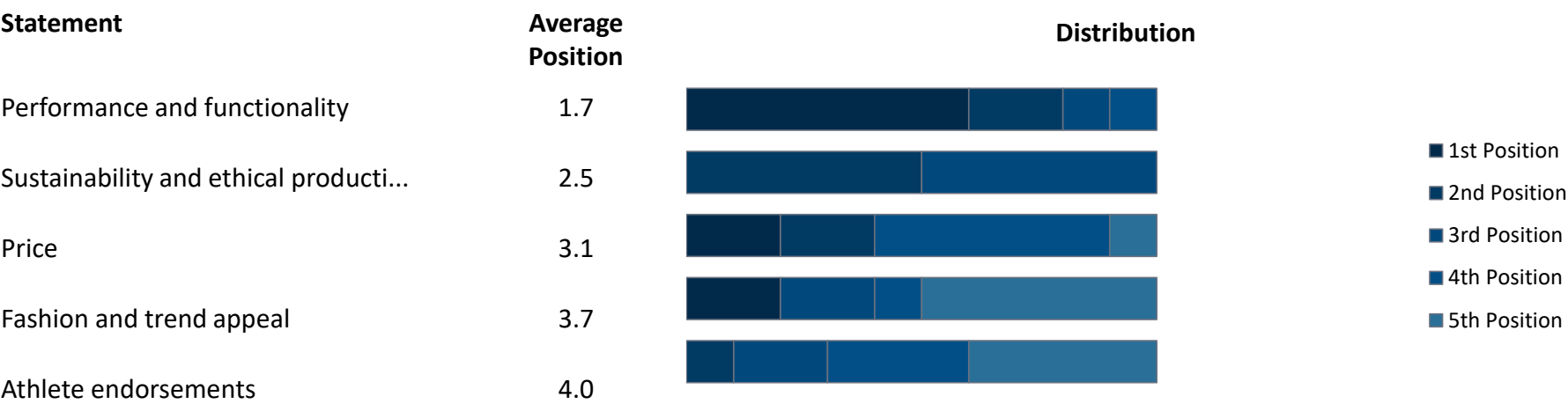
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## METRICS

Could you please rank the following options in order according to which factors influence your sportswear and equipment purchases from most significant to least?





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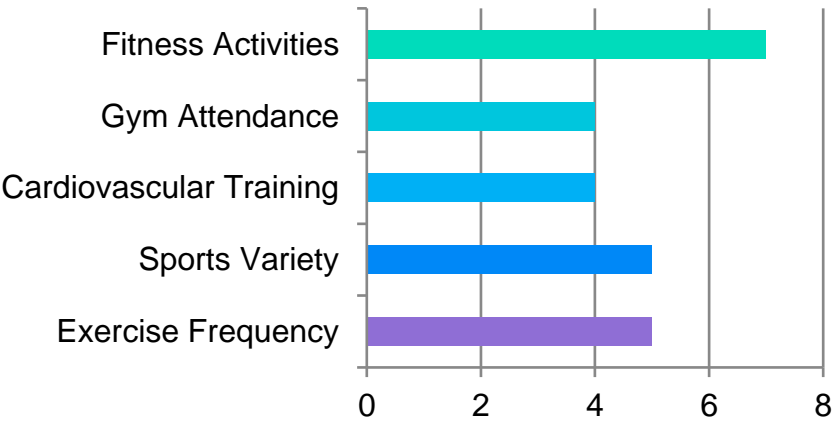
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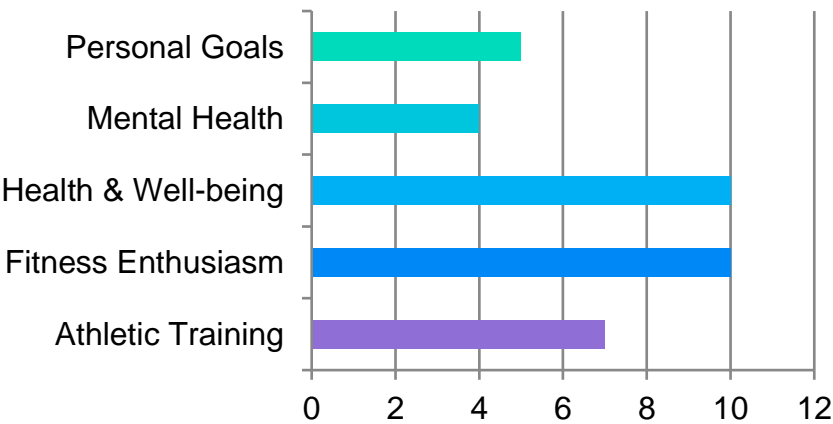
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## TOPICS

How often do you engage in sports or fitness activities per week?



Would you describe yourself as:



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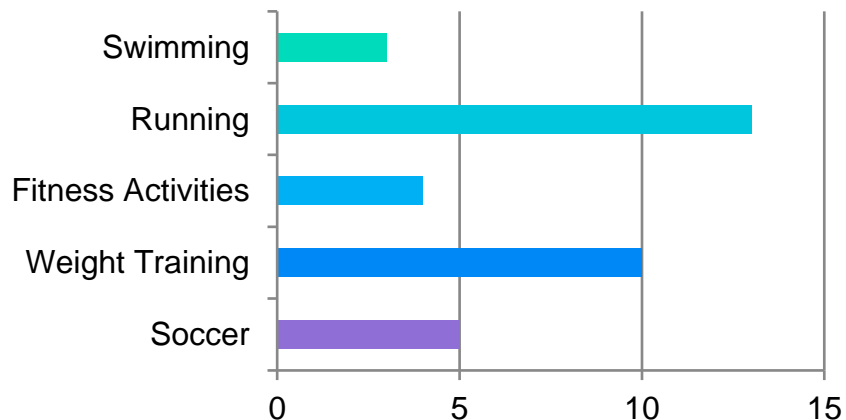
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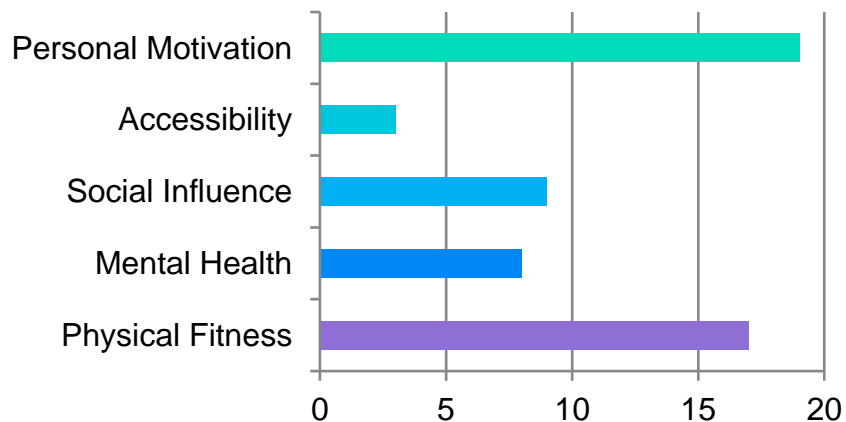
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## TOPICS

What sports or fitness activities do you actively participate in?



What factors influence your choice of these sports or fitness activities?





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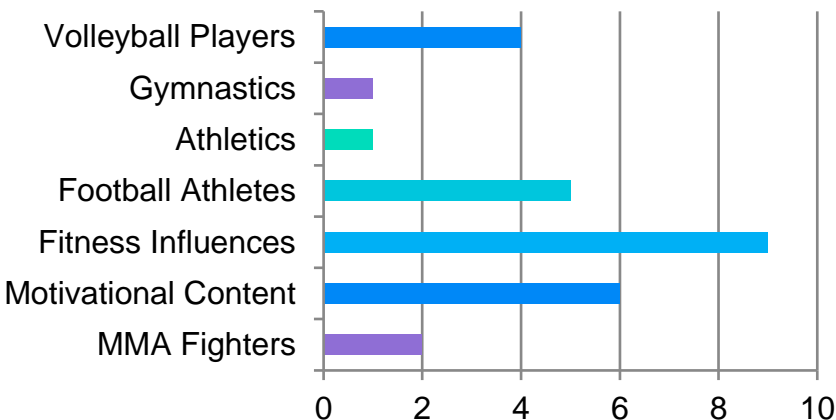
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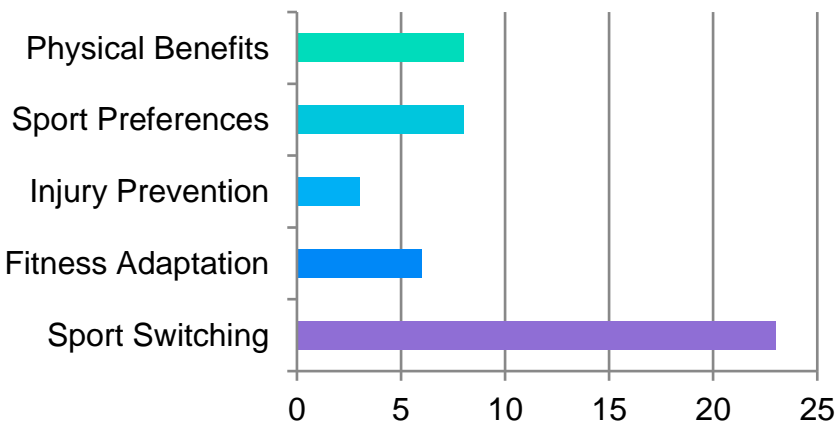
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## TOPICS

Do you follow professional sports or athletes? If so, which ones? (Following on social media, attending in person, watching on TV, etc.)



Have you switched from one sport or fitness activity to another? Why?





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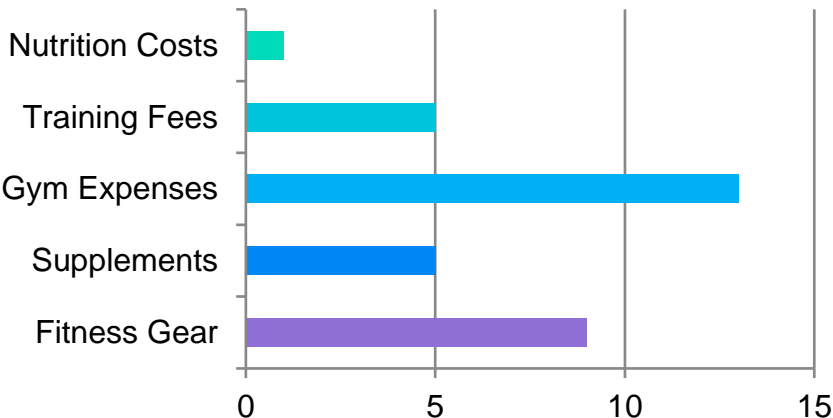
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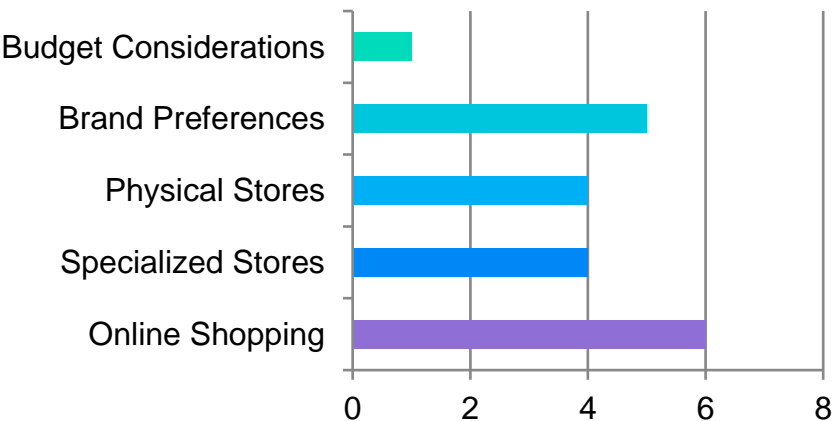
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## TOPICS

How much do you typically spend per month on fitness-related expenses (including gym, gear, training, apps, and events)?



Where do you prefer to purchase sports gear and equipment?





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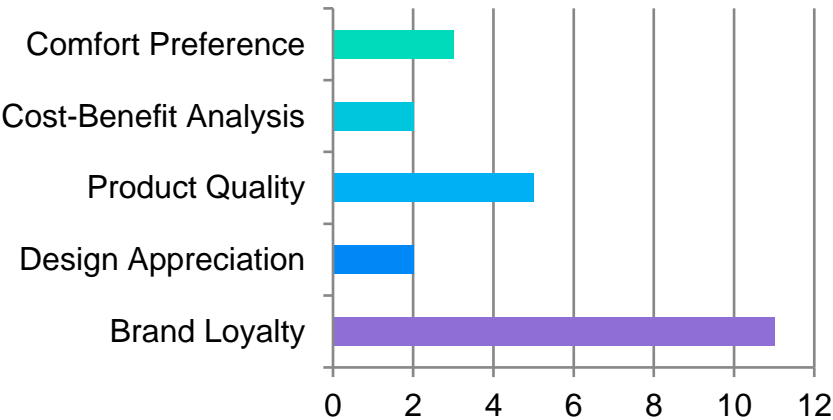
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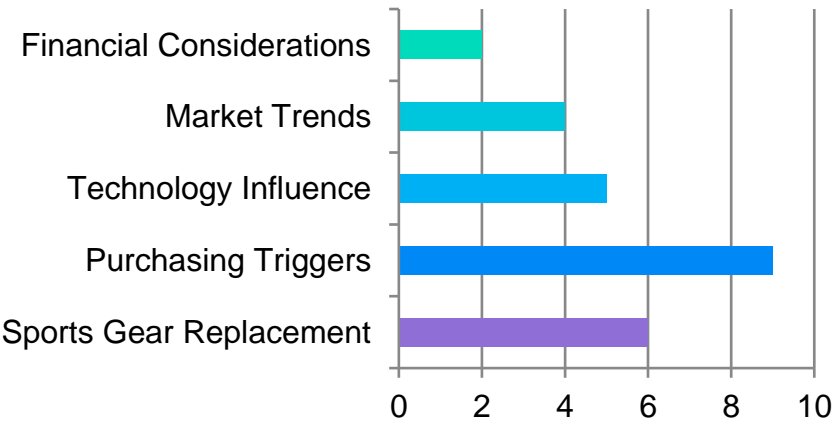
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## TOPICS

Do you own sports gear from multiple brands, or are you loyal to one brand? Why?



How do you decide it's time to invest in new sports gear?



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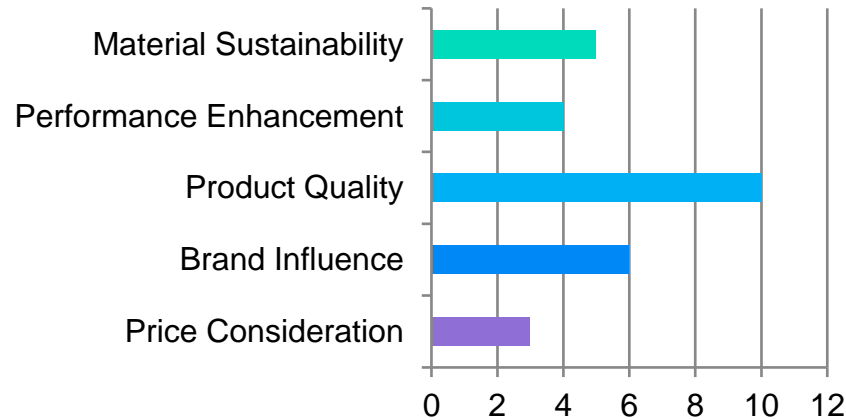
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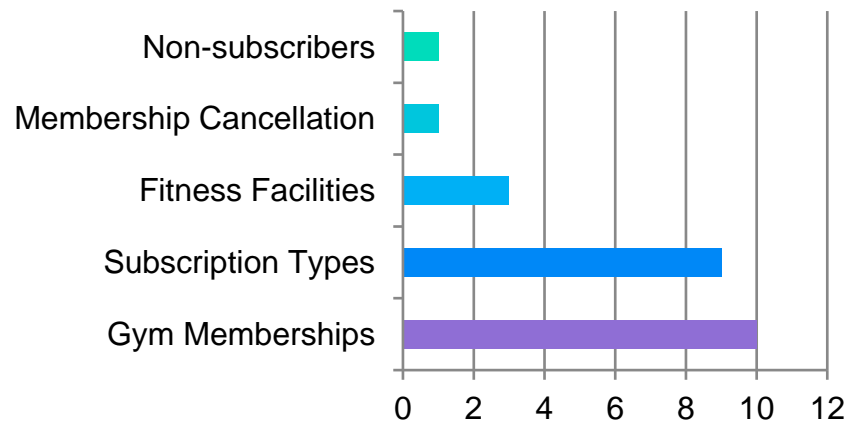
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Do you currently have a gym or fitness membership? If so, which type?







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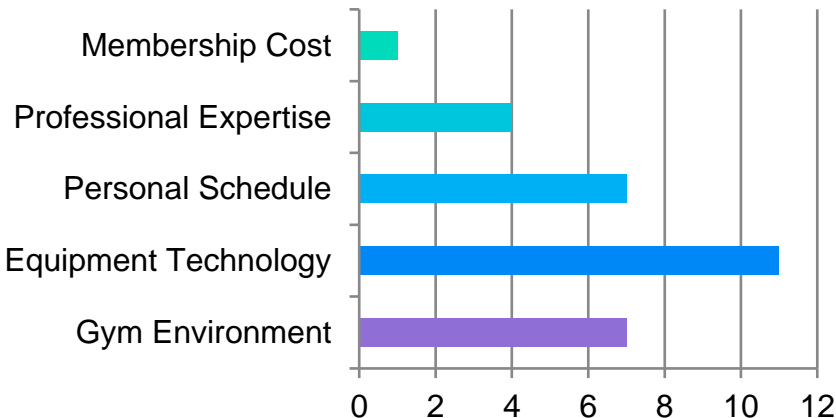
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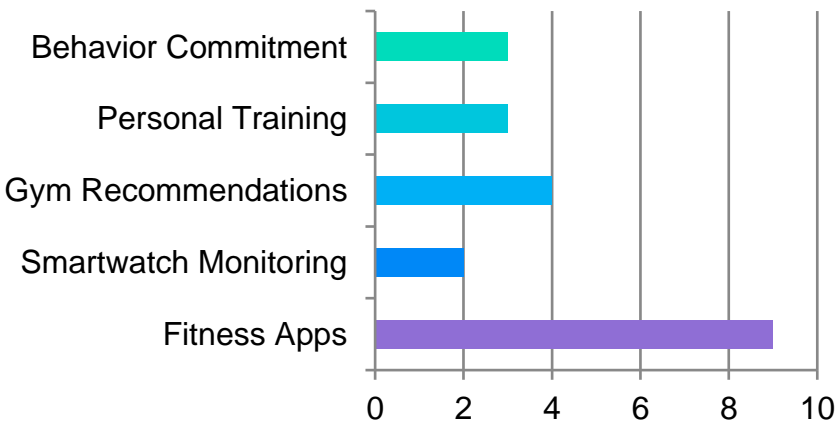
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What would make you use your gym or fitness membership more?



Do you use any fitness or workout apps? If so, which ones?





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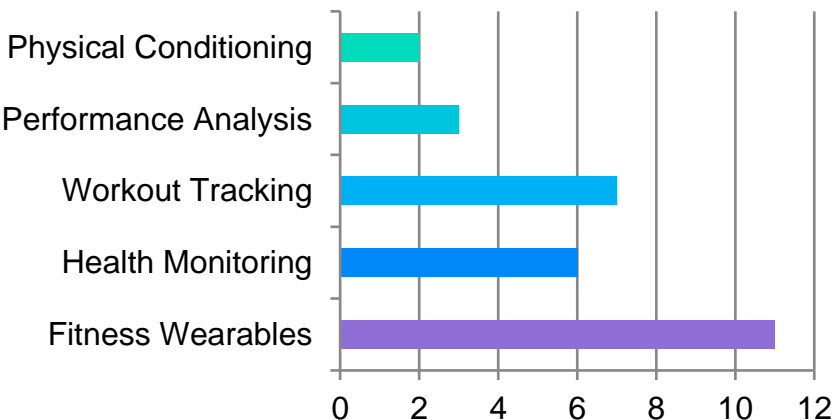
In the past 6 months, have you purchased any sportswear or fitness-related products?

### Custom Screening 3

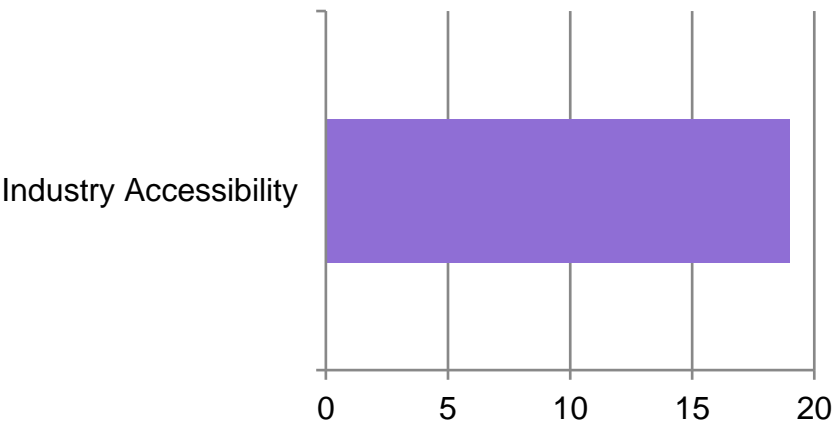
This survey includes video responses as short video clips. These clips from your recorded videos may be shown as examples on our website, social media accounts (LinkedIn and Twitter), and during marketing events. Do you agree to continue?

## TOPICS

Are you interested in fitness wearables (smartwatches, fitness bands, recovery trackers)? Why or why not?



If you could change one thing about the sports and fitness industry, what would it be?





## AUDIENCE

### Demographics

Brazil, Age 18 to 35

### Custom Screening

Which of the following best describes how you stay active in your daily life?

### Custom Screening 2

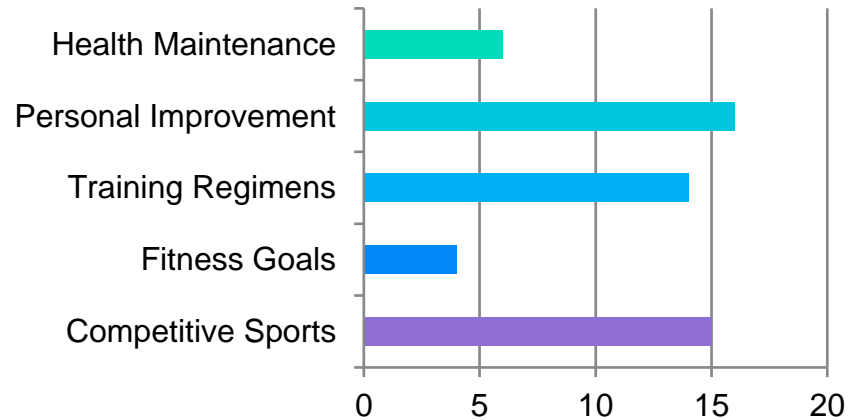
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## TOPICS

What do you want to achieve in the next 3 years? Do you plan to participate in Marathons, specific running or other sports competitions, Triathlon, etc.?



## AUDIENCE

### Demographics

Brazil, Age 18 to 35

### Custom Screening

Which of the following best describes how you stay active in your daily life?

### Custom Screening 2

In the past 6 months, have you purchased any sportswear or fitness-related products?

### Custom Screening 3

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## The Competitive Athlete

### Description:

- A 27-year-old married male with children, employed full-time, who engages in soccer, running, and weight training 3-4 times a week.
- He is motivated by social influences, mental health benefits, and the desire to maintain a good physique, which he sees on social media.
- Spends \$100-\$200 monthly on fitness-related expenses, prioritizes price and performance when purchasing sportswear, and is loyal to brands like Adidas and Nike for their innovative designs.

### Insights:

- This persona is highly influenced by professional athletes on social media and aims to emulate their physical conditioning.
- He is committed to a regular fitness routine, balancing work and social life, and is willing to invest in quality sportswear and supplements.
- Prefers online shopping for convenience and has a strong brand loyalty influenced by childhood preferences.

## The Fitness Enthusiast

### Description:

- A 30-year-old part-time employed male with children, who participates in gym workouts, Muay Thai, and cardio 5+ times a week.
- He is driven by the desire to maintain a fit body and high self-esteem, with a disciplined approach to his fitness routine.
- Allocates \$100-\$200 monthly on fitness expenses, including gym memberships and Muay Thai classes, and prefers shopping at specialized sports stores.

### Insights:

- This persona values the performance and functionality of sportswear and equipment, with a preference for specific brands known for their quality.
- He is consistent with his fitness activities, motivated by personal goals, and enjoys the structure and community of his gym and Muay Thai classes.
- Uses a smartwatch for health monitoring and is interested in fitness wearables for their practicality.

## The Active Socialite

### Description:

- A 25-year-old married male with children, working full-time, who enjoys soccer, weight training, running, and swimming, participating 5+ times a week.
- His fitness choices are influenced by the energy boost he gets from physical activities and the social aspect of sports.
- Spends \$200-\$300 monthly on gym memberships, swimming lessons, and sportswear, and shops both online and in physical stores.

### Insights:

- This persona has a diverse range of fitness activities, indicating a high level of energy and a need for variety in his routine.
- He prioritizes performance and functionality in his sportswear purchases, indicating a focus on quality and durability.
- He is open to trying new sports and fitness activities, suggesting a willingness to adapt and explore for better physical and mental well-being.





**REACH OUT TO US IF YOU HAVE  
FURTHER QUESTIONS ABOUT THIS  
REPORT**

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