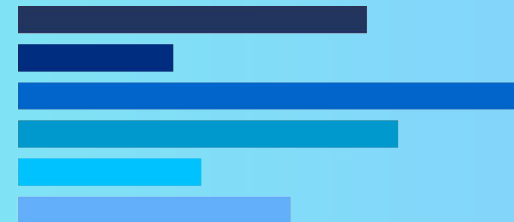




FITNESS
SOLUTIONS

What Members *Want*

The Data Behind Member Motivation
Part II: Market Research Report



This eBook is the second installment of our *2022 Marketing Research Report*

Be sure to read *Part I | 2022 Market Research Report: How to Optimize Personalization Using Fitness Personas*. In this report, four key fitness personas were defined and explored. These personas informed our work as a whole.

There is also a supplemental *webinar* for a deeper dive into marketing to your audience using these four personas.



Routine Lifers

10%
Prefer gym workouts



Optimizing Personalization
Using Fitness Personas
2022 Next Fitness Consumer Research

ABC
FITNESS
SOLUTIONS
Our focus is
your strength.



Wellness Lovers

Motive

(noun) /'mō-tiv/

something (such as a need or desire) that causes a person to act.

In our extensive survey conducted in partnership with ClubIntel, we were looking to discover the motivating factors that drive potential gym-goers toward exercise and fitness. We also looked at what keeps them exercising.

What do members want?

By looking at key portions of the data in our 2022 Market Research, we can see the motives behind individuals' choices emerge.

You can then adjust marketing strategies and business decisions accordingly.

We are excited to share our research with you and hope you consider new marketing strategies to motivate your members.

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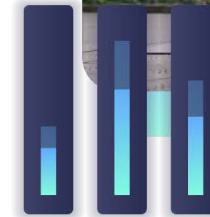
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Methodology

- Online survey among a highly targeted profile of “active” consumers.
- The participants reflect those who are age 18 and older and who were currently exercising, working out or staying active. The study also captured responses from consumers who stated they were not active but had an interest in doing so. If a consumer was not currently active and had no interest, they were disqualified from the study.
- In all, the study captured 1,500 qualified consumer responses within major U.S. markets and across all U.S. regions. The sampling was balanced by region, gender, and age. The study was administered by ClubIntel in collaboration with Dynata, an international research panel firm.



Disclaimer -The statistical information contained in this report is representative of the individuals responding to this survey. All reasonable efforts were taken by ClubIntel to assure data comparability within the scope and limitations of the reporting process. However, the data contained in this report is not necessarily based on third- party audited data. The statistical validity of any given number varies depending upon sample sizes and the amount of consistency among responses for any data point. The data in this survey is representative of the sentiments reported by the targeted respondents.

ClubIntel and ABC Fitness Solutions, therefore, make no representations or warranties with respect to the results of this study and shall not be liable to clients or anyone else for any information inaccuracies, errors or omissions in content, regardless of the cause of such inaccuracy, error or omission. In no event shall ClubIntel or ABC Fitness Solutions be liable for any consequential damages.

Latest Research on what Motivates Consumers

If you want to motivate someone to join, you need to know what people value as 'ideal' in their search for a gym.

So, in our survey we asked active consumers what their "ideal" health club experience would entail.

With nearly 1500 written comments, there was a wide range of sentiment. Following are four key themes that were discovered in our sentiment analysis along with the key phrases that were used. We then included a quote from a survey respondent that was representative of that sentiment.

By drawing inspiration from these four themes and quotes, you can think about making decisions on how to best manage your marketing, facilities and staff.

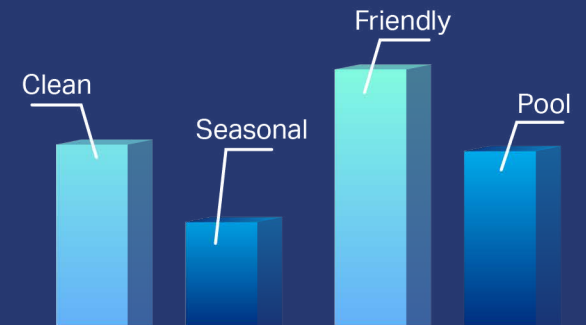
The Ideal Health Club Experience

01 Environment

02 Enrollment

03 Staff

04 Products/Services



Theme #1: Environment

- Clean/sanitary
- Safe (physically and emotionally)
- Welcoming
- Judgment free
- Not too crowded
- Emotionally comfortable
- Spaced out
- Uplifting/positive/encouraging/supportive

The ambiance is one of the biggest factors to me. I want my gym to feel almost spa-like, having a welcoming environment where people aren't super judgmental of your abilities and/or inabilities or about how much or how little you want to add exercise in your life."

"I just want a relaxed and welcoming environment focused on health and wellbeing. Ample space and ample equipment. Safe and relaxing."



Theme #2: Enrollment

- No long-term commitment
- No contract
- Free trial
- Hassle-free
- Affordable/reasonable price
- Seasonal memberships (for winter)

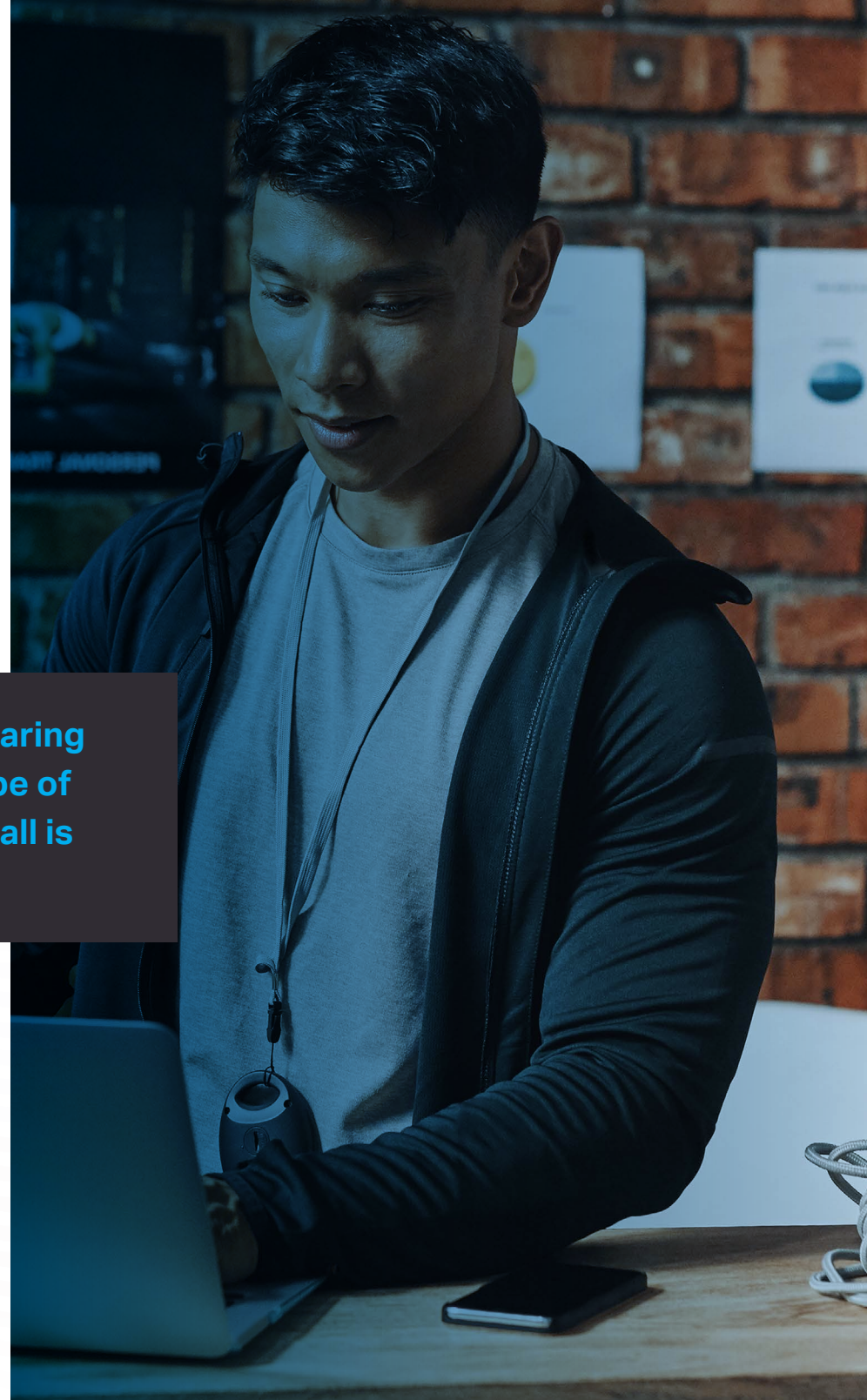
"I just want a fair price with no long-term commitment or impossible to get out of contracts."



Theme #3: Staff

- Caring
- Attentive
- Available
- Friendly
- Educated
- Not bothersome
- Trainer on site for guidance (not 1:1)

“What is important to me is a gym with kind caring people. Staff, a lot of time, determines the vibe of the space, so being caring and welcoming to all is very important.”



Theme #4: Products/Services

- Focuses on both physical and mental health
- Pool
- Unlimited taught classes for low price
- Age-related classes to reduce intimidation
- Offers at-home workout plan
- Wide variety of equipment and classes

"I love the idea of focusing on both body and mind. Mental health is such a huge part of getting healthy and if it's not supported then it's impossible to move forward successfully..."



Survey Responses

Here are two examples of comments representative of a common sentiment received from recipients. *What are you doing to help foster a judgment free environment?*

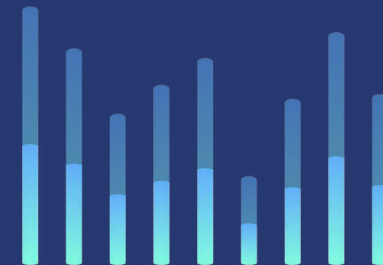
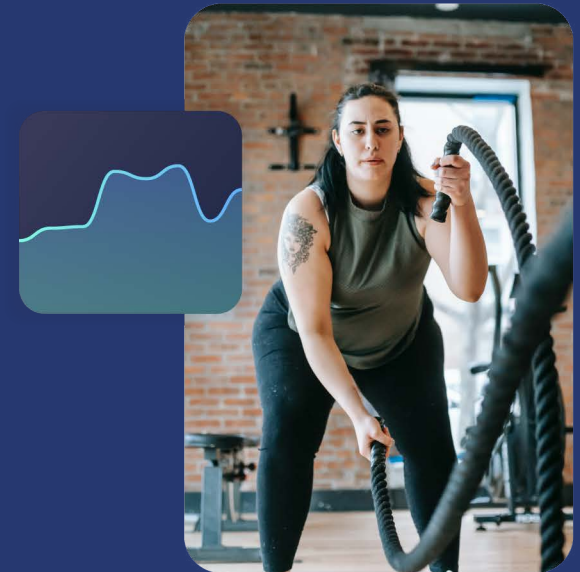
"What I want is a judge free environment. I want this kind so you can really focus on yourself and not the stares. Instead of getting up in the morning and going to the gym with the excuse that people will stare, go with the fact that you are doing this for you and only you."

"Non-judgment. I am a mom of two with no workout experience and literally am terrified of going to the gym or having people see me work out because I'm out of shape and don't want to look dumb that I'm short winded and don't know what I'm doing."

Action you can take:

According to *Ranier Health & Fitness*, they create a judgment-free atmosphere by being intentional about the types of machines they have, having very few mirrors in the facility and posting pictures of members and community on one of the main walls of the gym.

Consider a layout that doesn't make members feel on display. Cardio machines overlooking the weight floor can create a "fishbowl" type environment.



Goals for Fitness and Exercise: Our *Motivations*

Why does one embark upon a fitness and exercise journey? The reasons are manifold, but some key reasons rise to the top as we conduct our market research. While “to be active” remains the top goal for fitness there are some surprising changes in the motivations of exercisers since 2021.

Action you can take:

Depending on the culture of your club and community, the members’ motivations for exercising might be different from our survey findings here.

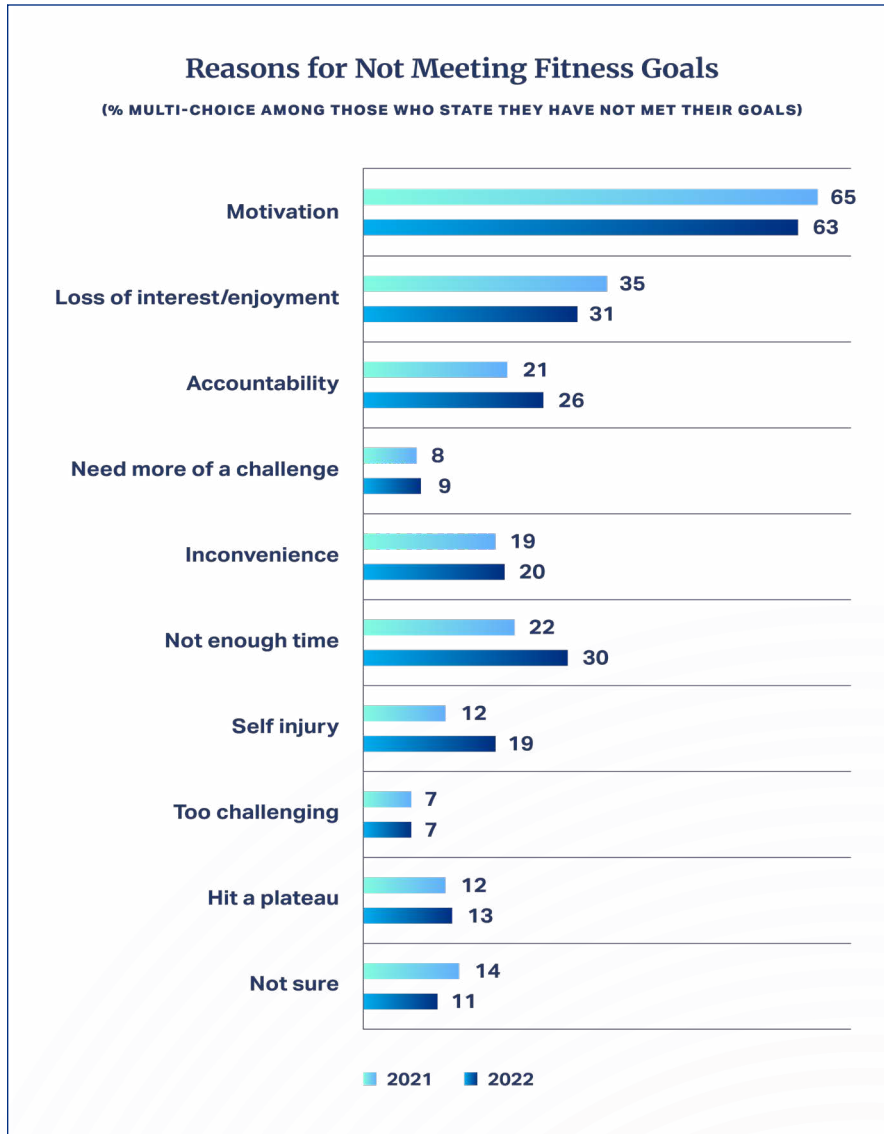
We recommend conducting a survey of your members to gauge why they exercise – use our partners MXMetrics, the world’s leading experts on Operational Member Experience Management.

TAKEAWAYS

Desire for mental health benefits is up 9 points. Are you addressing your audience’s increased interest in exercising for mental wellness? Based upon this chart you should be!

The desire to lose weight is down 5 points. Losing weight is just not as popular as it once was. It might be important to keep this in mind when marketing.





When *Motivation* Lacks

Our survey found that lack of motivation is a huge problem when it comes to individuals meeting their goals. 63% of individuals who have said they have not reached their desired goal blame lack of motivation.

Action you can take:

Consider a motivational newsletter for your members that will keep them engaged and inspired.

Think about how you can make your gym more visually inspiring to members. Hang motivational quotes and inspiring imagery in key places.

Promotions that *Generate Interest*

To help marketers of health club brands better understand the themes and tactics of various campaigns that have strong appeal to influence a trial, our survey tested a battery of 19 campaign slogans. This approach to testing messaging is typically conducted within a comprehensive advertising concept study. Even with the limitations of our modified testing approach, there are clear themes to share that would have strong appeal to the consumer looking for a gym to join:

FLEXIBILITY – with the countless membership options, price points, and contract options that health clubs/gyms currently offer, consumers want simplicity. They also resist long-term commitment. Basically, they're asking for flexible contract terms with limited commitment. No strings attached; just start working out for a monthly fee and you can quit whenever you want.

TRANSPARENCY – the campaign theme of “no gimmicks” ranked highly, exposing consumers’ interest in cutting through the red tape and finding an offer that is straightforward. No game playing. No gimmicks.

TRIAL – several of the campaigns tested included a limited trial to provide consumers access and an opportunity to try before they buy. These trials were well received in the test.

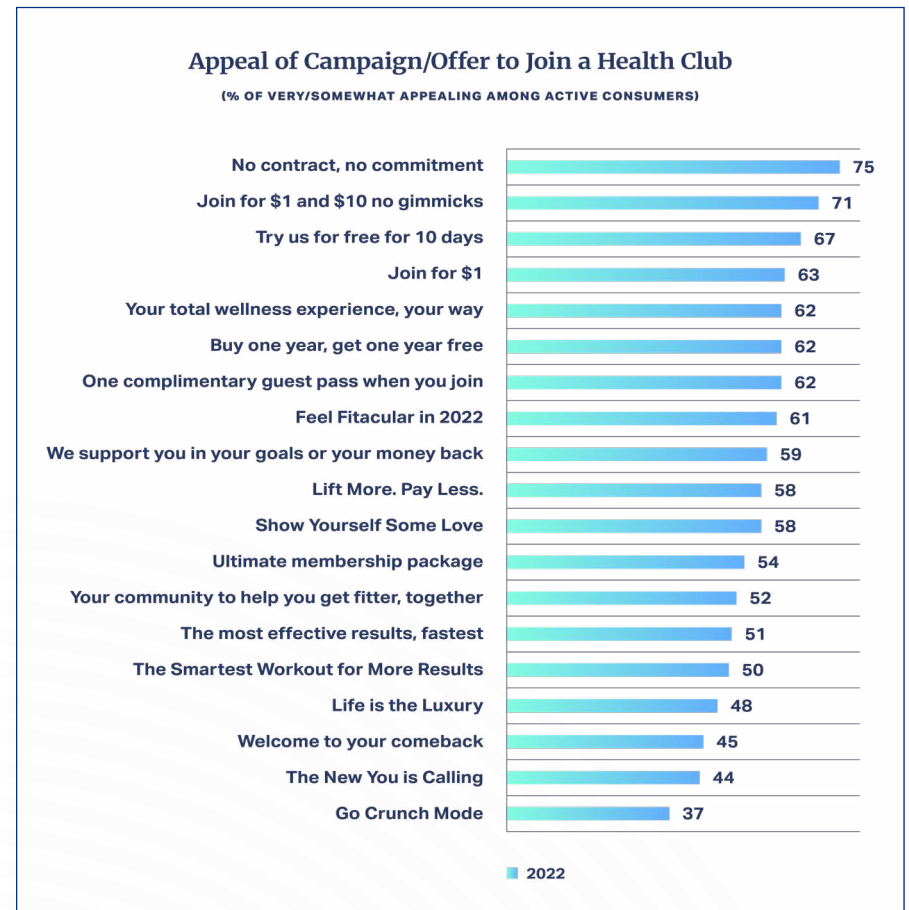
Pricing and Motivation to Join a Gym

Standard price point promotions seem to be a way of the past. Campaigns and offers that have the highest appeal to active consumers will need to be transparent (no gimmicks). They should also provide trials to test-drive the experience and offer flexible options with low commitment. Both marketing messages and sales processes should align to communicate these campaign promises without any surprises.

Action you can take:

Offer a free trial — this theme came loud and clear throughout our research.

Try offering seasonal memberships. This makes avenues for students and seasonal residents to best take advantage of your offerings.



Where do you Exercise?

Although it has dropped in participation rates (down 5 points from 2021), the outdoors remains the top choice for exercise. The second choice for exercise, use of at-home fitness equipment, holds steady with 35% year-to-year participation and remains significantly higher than pre-pandemic rates.

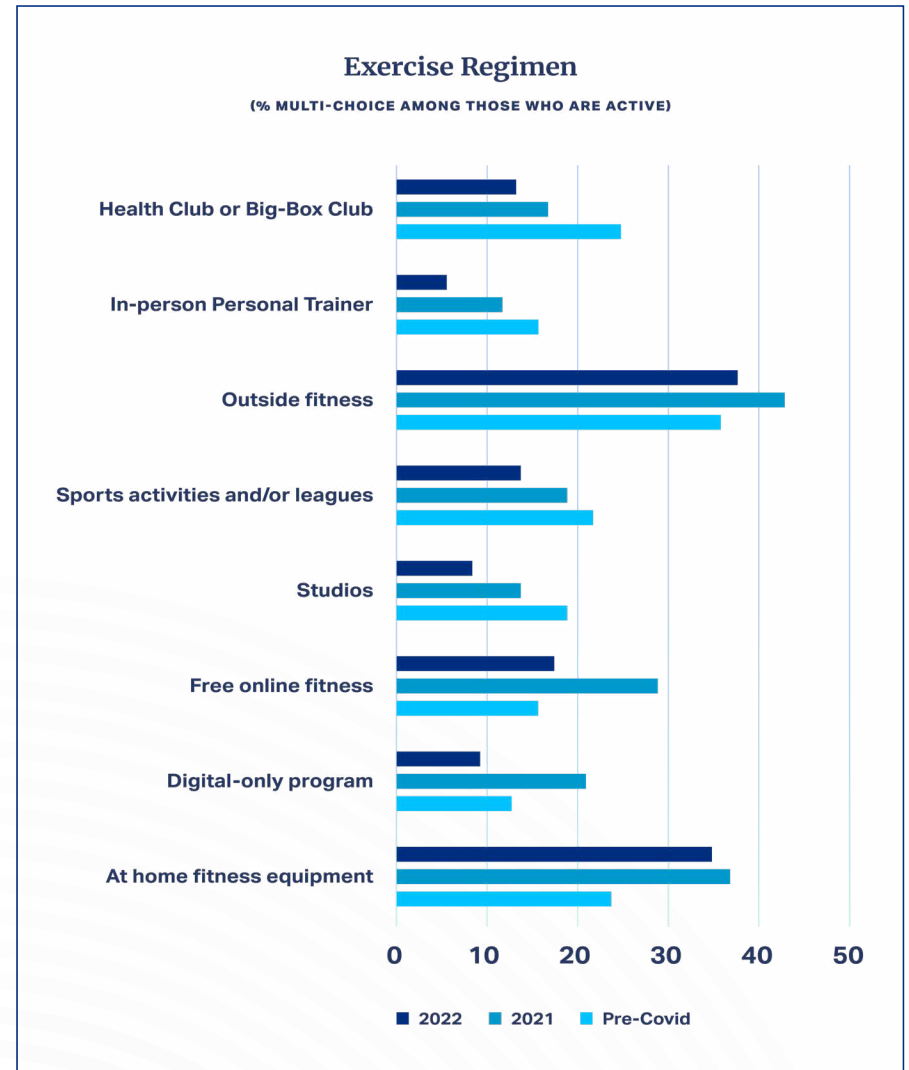
Of interest, however, participation in the health club and studio sectors and personal training have not seen a rebound significant enough to regain their pre-pandemic rates.

Free online fitness and digital-only programs have taken a hard hit and are well below pandemic levels.

Action you can take:

Restructure your program offerings to account for the different regimens described in the chart.

Look for new technology to support different ways of reaching members where they want to be.



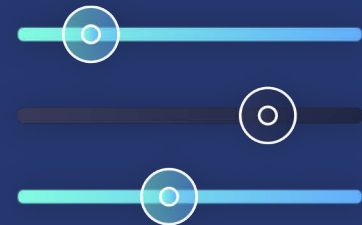
Key Learnings *From the Data*

In this eBook we shared key pieces of data regarding the motivation of potential members. What really stood out to us? Here are our top 3 take home tips.

Try and make your members feel comfortable in their own skin. Gyms should be judgment free zones where members of all abilities are welcome.

Place more emphasis on mental health when considering your offerings.

No gimmick pricing works.



About ABC Fitness Solutions

ABC Fitness Solutions (abcfitness.com) is the premier provider of software and related services for the health and fitness industry. Building on a reputation for excellence in support for clubs and their members, ABC is the trusted provider to boost performance and create a Total Fitness Experience for members of clubs of all sizes, whether a national franchise, regional chain, or a local gym. Founded in 1981, ABC helps nearly 16,000 clubs and facilities globally perform better and more profitably, offering a comprehensive SaaS club management solution that enables club operators to achieve optimal performance.

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About ClubIntel – At ClubIntel, we deploy traditional marketing research methods to uncover not only what your clients and members want, but also to understand why they want it. In unlocking your clients' motivations, we can provide the uncommon insights that drive differentiated marketing communications, sales process, and operational programming. The most successful, profitable clubs understand their customer and turn that knowledge into a personal connection. Our data makes that happen.

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