Optimizing Personalization Using Fitness Personas

2022 Next Fitness Consumer Research

ABC FITNESS SOLUTIONS

Our core is your strength

What’s Inside

Latest Consumer Research - Key Learnings

Introducing The New Fitness Personas

Fitness Persona Preferences and Opportunity

What's Inside

As the industry moves into the next phase of the easing pandemic, the question remains just how the active consumer will embrace health and wellness going forward. With omni-channel workout regimens a pervasive talking point for health and fitness clubs to consider as a new value proposition for their membership, does the consumer still want the diverse array of options that were necessary during the pandemic lock downs? Or has pre-pandemic exercise behavior circled back around with the consumers going back to traditional workout routines? These questions and more have been at the forefront of discussion among fitness industry experts as we consider how to best service the health and fitness consumer for the long run.

In this release of our 2022 market research, you will see four distinct consumer personas aggregated from 2 years of consumer research. The findings in this report have been supplemented with commentary from industry experts presented during IHRSA 2022.

What's Inside

Methodology

- Online survey among a highly targeted profile of "active" consumers.
- The participants reflect those who are ages 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, or 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.

Meet Our Industry Experts

Mark Williamson
Co-founder
ClubIntel

Lee Robinson
National Sales Director
ABC Fitness Solutions

Cristine Kao
Chief Marketing Officer
ABC Fitness Solutions

Kelly Thorne
Vice President
Movati

2022 Consumer Research Key Learnings

Compared to 2021

5 pts+

66% vs 71% more active

Compared to 2021, 71% of consumers state being active compared to 66% last year.

Their primary goal for fitness? To simply ”be active” (at 47%, interest levels for this goal are unchanged from 2021).

Growing interest to maintain/improve mental health and stress relief through a fitness regimen (at 44%, it’s up 9 points from 2021)

2022 Consumer Research Key Learnings

Where they exercise

Outdoors

Free online and digital only significant decline

The outdoors remains the top choice of where to workout (38% of mentions, down 5 points from 2021).

The second choice is working out at-home and holds steady with 35% year-to-year participation and remains significantly higher than pre-pandemic rates.

Participation in the health club (14%), studio (9%) and PT (6%) 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 usage

2022 Consumer Research Key Learnings

Favorite programming:

Flexibility/Stretching

Functional resistance
training rank in top 5.
Meal tracking new in top 10

Flexibility/stretching grew in interest to become the top-rated option

Functional resistance training grew and ranks within the top 5

Meal tracking (new to the study this year) ranked within the top 10

ABC FITNESS SOLUTIONS

The Next Fitness Consumer Personas

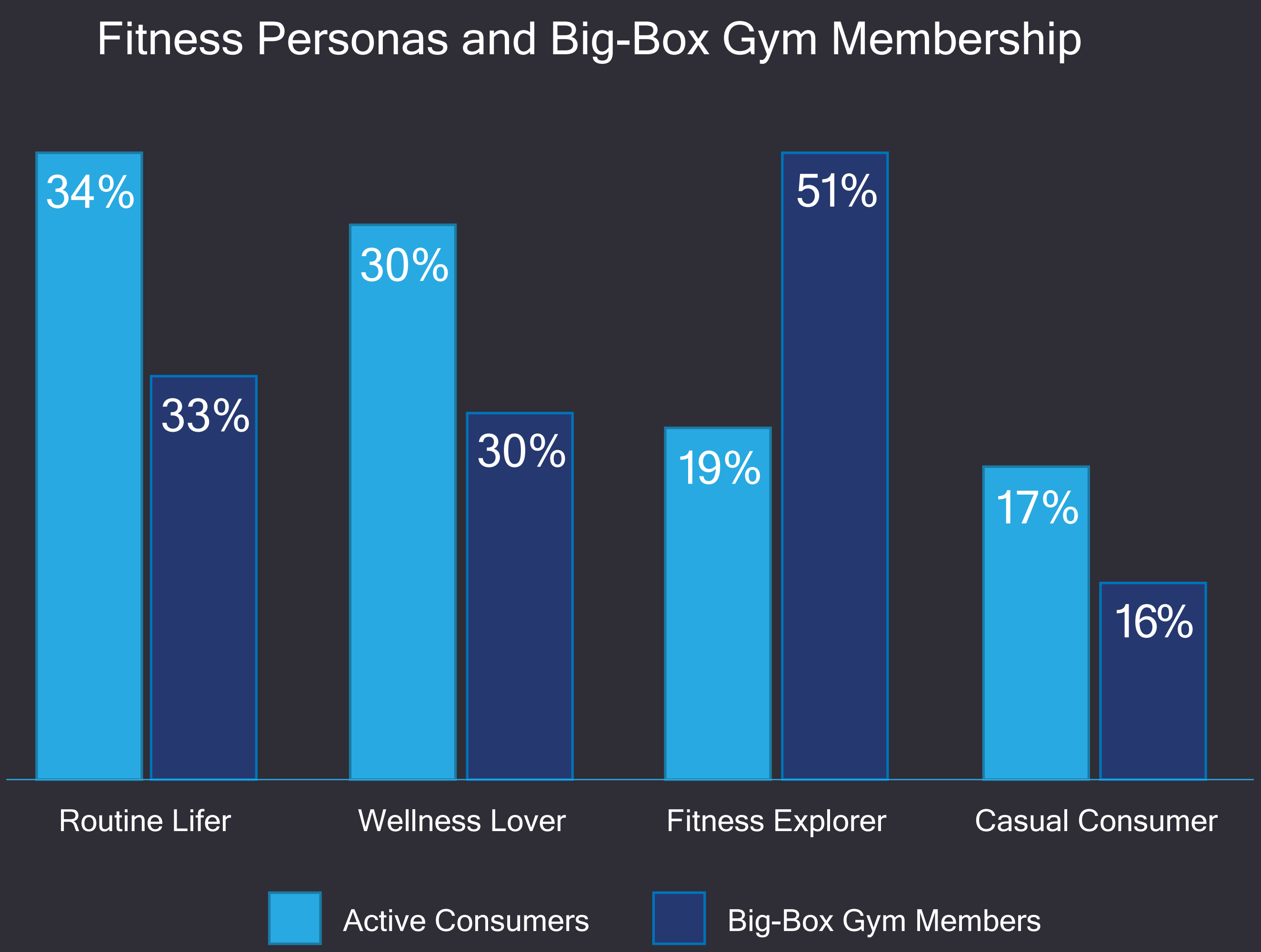
“The x axis is the total money someone is spending on fitness. This encompasses not just the gym membership, but fitness spend in terms of boutiques, leagues, sports clubs and more.”

Cristine Kao
Chief Marketing Officer
ABC Fitness Solutions

“When looking at the y axis, the preference to workout in the gym is representative of what percentage of their routine is used in a gym. For instance, Routine Lifers prefer 21% of their routine in a gym. How can we grow our share of workout preference through personalization? ”

Mark Williamson
Co-founder
ClubIntel

The Industry's Opportunity



"The Routine Lifers are the persona that the industry is likely making business decisions about. If we're making business decisions based on their persona, we are not looking at the bigger market, like Wellness Lovers and Fitness Explorers. How do we get them motivated to come in?"

Lee Robinson
National Sales Director
ABC Fitness Solutions

Routine Lifers

34%

Sticks to a consistent regimen day in and day out

"I'm self-motivated and don't need all the fuss."

Demographics

Age	Region	Income	Employment
 66 years or older (35%)	 Southwest, Midwest, Pacific	 0-50K (26%) 50-100K (42%) 100K+ (32%)	FULL-TIME 36% Retired (38%)

Fitness Goals

To be generally active	66%
Maintain/improve mental/health/stress relief	61%
On track to meet their goals	80%
Maintained fitness level through pandemic	55%

Workouts

Frequency	Gym Frequency	On their own	Own Equipment	Membership	Gyms/Clubs
More than 12x a month	More than 12x a month	Prefer solo workouts	Purchase At-home equipment	Big Box Gyms	Prefer to workout in gyms/clubs
52%	35%	83%	33%	33%	21%

Monthly Spend

>$25 per month: 63%

Routine Lifer Takeaways

"How do we get the Routine Lifers to return? We haven't seen this age group return as fast as 25-35 age group; how do we bring that community feel back to the club? I ask my team to focus on how to host events that foster that sense of community to bring this group back into the club."

Kelly Thorne
Vice President
Movati

"From a programming perspective, we've started to add older adult programming for 50-60+ to have them workout with people that have like-minded goals so that they not only feel more comfortable, but also so that they can and build relationships and connectivity in the club."

Kelly Thorne
Vice President
Movati

Routine Lifers crave the community aspect of fitness. Consider hosting events within your club and in the community to help them build relationships and feel comfortable coming back into the club.

Wellness Lovers

30%

Balances fitness, nutrition and mental/physical wellbeing

"I'm in pursuit of all aspects of wellness - physical, spiritual, mental and emotional."

Demographics

Age

25 to 39 years old (36%)

Region

Southwest, Southeast, Pacific

Income

0-50K (27%)
50-100K (31%)
100K+ (42%)

Employment

FULL-TIME
61%

Fitness Goals

To be generally active	69%
Maintain/improve mental/health/stress relief	72%
On track to meet their goals	89%
Improved fitness level through pandemic	52%

Workouts

Frequency	Gym Frequency	On their own	Own Equipment	Membership	Gyms/Clubs
More than 12x a month	More than 8x a month	Prefer solo workouts	Purchase At-home equipment	Big Box Gyms	Prefer to workout in gyms/clubs
55%	34%	63%	61%	49%	25%

Monthly Spend

$25+ per month 56%

Wellness Lovers Takeaways

"Wellness Lovers are more holistic in their approach. For clubs focusing on Wellness Lovers, they need to think about how to combine group x, recovery classes, yoga, nutrition and meal tracking. With all these things combined, clubs need to think about how to package and sell it as a bundle so that we're addressing all their needs in one. "

Mark Williamson
Co-founder
ClubIntel

"This is where full scope of wellness comes into play where you have wellness and programming. Clubs focusing on Wellness Lovers need to think about being the sole-provider of wellness for this persona and then personalizing it and programming it for them. It needs to be mapped out every step of the way, so they don't have to figure it out on their own. For this persona, they're wanting to try the next step in their wellness journey, and it doesn't always have to be physical. "

Lee Robinson
National Sales Director
ABC Fitness Solutions

Wellness Lovers are looking for a more well-rounded approach to health. Adding and packaging programming that focuses beyond the physical aspect of health, such as nutrition, mindfulness and recovery aligns with the Wellness Lover's pursuit to be physically and mentally fit.

Fitness Explorer

19%

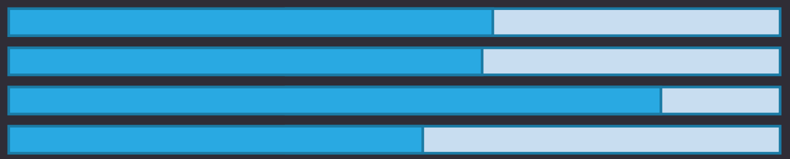
Continuously seeks out new fitness programs, products and services

"I'm a bit promiscuous with my pursuit of finding an inspiring workout."

Demographics

Age	Region	Income	Employment
25 to 39 years old (41%)	Southeast, Southwest, Midwest, Pacific	0-50K (26%) 50-100K (44%) 100K+ (30%)	FULL-TIME 61%

Fitness Goals



To be generally active	63%
Maintain/improve mental/health/stress relief	62%
On track to meet their goals	82%
Improved fitness level through pandemic	59%

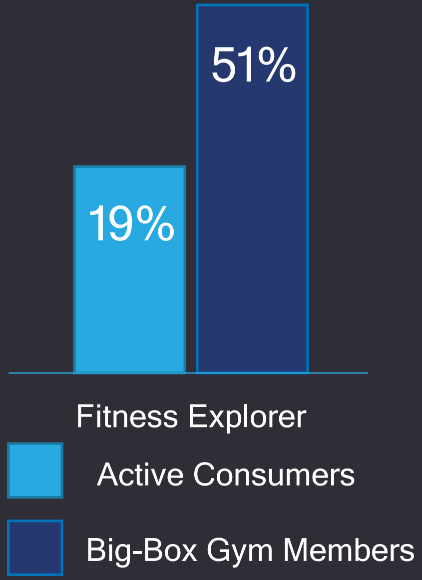
Workouts

Frequency	Gym Frequency	On their own	Own Equipment	Membership	Gyms/Clubs
More than 12x a month	More than 4-8x a month	Prefer solo workouts	Purchase At-home equipment	Big Box Gyms	Prefer to workout in gyms/clubs
39%	40%	64%	71%	51%	16%

Monthly Spend

$25+ per month 69%

Fitness Explorer Takeaways



"51% have gym memberships but only 19% are active. This tells me that we are simply collecting dues but aren't motivated this persona to come through. How do we keep them motivated to stay with us? "

Lee Robinson
National Sales Director
ABC Fitness Solutions

"It is going to be key to look at new programming to bring forward for this group. It will be important to hook them into our key services like personal training, small group training and group x to keep them engaged."

Kelly Thorne
Vice President
Movati

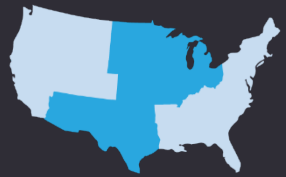
Kelly said it best: this persona demands " what they need next to achieve the goals that they want." For clubs pursuing the Fitness Explorer, it will be key to introduce programming that gets them engaged. Set expectations for how to keep them on track - even metrics like heart rate and steps are a good start!

Casual Consumers

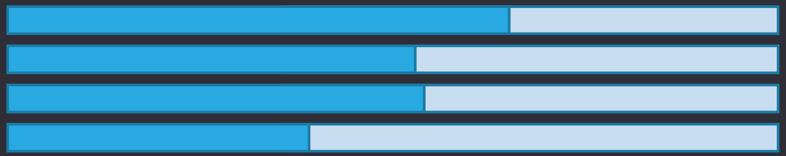
17%

Fitness motivation is primarily event driven (vacation beach body, wedding, etc.)

"My fitness is motivated by an upcoming vacation or event"

Demographics	Age	Region	Income	Employment
	 25 to 39 years old (53%)	 Southwest, Midwest,	 0-50K (37%) 50-100K (35%) 100K+ (18%)	FULL-TIME 52% Retired (24%)

Fitness Goals



Workouts	Frequency	Gym Frequency	On their own	Own Equipment	Membership	Gyms/Clubs
	Less than 4x a month	Less than 4x a month	Prefer solo workouts	Purchase At-home equipment	Big Box Gyms	Prefer to workout in gyms/clubs
	27%	45%	88%	35%	16%	10%

Monthly Spend **$25+ per month 27%**

Casual Consumers Takeaways

"The big thing that jumps out for me is that 57% report that they are on track to meet their fitness goals. This persona fails a couple of times and is also trying to not only figure out what motivates them, but where they belong. This is where the community aspect comes in - they need to figure out where they belong."

Lee Robinson
National Sales Director
ABC Fitness Solutions

"When the Casual Consumer comes through the door - they are terribly insecure. They need someone to hold their hand through the process. They need introductions and orientations. Have those conversations with them in the sales process and understand their why."

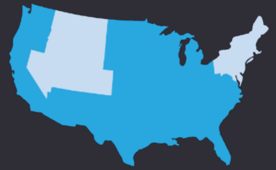
Mark Williamson
Co-founder
ClubIntel

A wedding, a vacation, a life milestone…these are all motivators for bringing the Casual Consumer through the door. This consumer needs a welcoming, judgement-free zone. Catering to this consumer doesn't have to be overbearing - even having staff present on the floor will help this consumer feel more secure and have a sense of belonging.

Fitness Consumer Personas

Dominant Traits Comparison

	Routine Lifers	Wellness Lovers	Fitness Explorers	Casual Consumers
Age	66+ (35%)	25-39 (30%)	25-39 (41%)	25-39 (53%)
Region	Southwest, Midwest, Pacific	Southeast, Southwest, Pacific	Southeast, Midwest, Southwest, Pacific	Southwest, Midwest
Income	0-50K (26%) 50-100K (42%) 100K+ (32%)	0-50K (27%) 50-100K (31%) 100K+ (42%)	0-50K (26%) 50-100K (44%) 100K+ (30%)	0-50K (37%) 50-100K (35%) 100K+ (18%)
Employment	Full-time (36%) Retired (38%)	Full-time (61%)	Full-time (61%)	Full-time (52%) Retired (24%)
Workout Frequency	More than 12x a month (52%)	More than 12x a month (55%)	More than 12x a month (39%)	Less than 4x a month (27%)
Workout Routine	Outdoors (54%)	Outdoors (57%)	Outdoors (60%)	Outdoors (46%)
Prefer to workout in Clubs/Gyms	21%	25%	16%	10%
Fitness Throughout Pandemic	Maintained fitness level (55%)	Improved fitness level (52%)	Improved fitness level (59%)	Improved fitness level (35%)
Number 1 Goal	To be generally active (66%)	Maintain/improve health/stress relief (72%)	To be generally active (63%)	To be generally active (73%)
Number 2 Goal	Maintain/improve health/stress relief (61%)	To be generally active (69%)	Maintain/improve health/stress relief (62%)	Maintain/improve health/stress relief (55%)
On track to reach goals	80%	89%	82%	57%
Monthly spend on health/fitness	Less than $25 a month (63%)	More than $25 a month (56%)	More than $25 a month (69%)	More than $25 a month (27%)
Big Box gym members	33%	49%	51%	16%
Gym workout frequency	More than 12x a month (35%)	More than 8x a month (34%)	4-8x a month (40%)	Less than 4x a month (45%)
Gym workout regimen	Workout on their own (83%)	Workout on their own (63%)	Workout on their own (64%)	Workout on their own (88%)
Purchase at-home equipment	33%	61%	71%	35%

Demographics		Age	Region	Income	Employment
Routine Lifers		66 years or older (35%)	 Southwest, Midwest, Pacific	 0-50K (26%) 50-100K (42%) 100K+ (32%)	FULL-TIME 36% Retired (38%)
Wellness Lover		25 to 39 years old (36%)	 Southwest, Southeast, Pacific	 0-50K (27%) 50-100K (31%) 100K+ (42%)	FULL-TIME 61%
Fitness Explorer		25 to 39 years old (41%)	 Southeast, Southwest, Midwest, Pacific	 0-50K (26%) 50-100K (44%) 100K+ (30%)	FULL-TIME 61%
Casual Consumer		25 to 39 years old (53%)	 Southwest, Midwest,	 0-50K (37%) 50-100K (35%) 100K+ (18%)	FULL-TIME 52% Retired (24%)

Fitness Goals

Routine Lifers

To be generally active	66%
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Wellness Lover

To be generally active	69%
Maintain/improve mental/health/stress relief	72%
On track to meet their goals	89%
Improved fitness level through pandemic	52%

Fitness Explorer

To be generally active	63%
Maintain/improve mental/health/stress relief	62%
On track to meet their goals	82%
Improved fitness level through pandemic	59%

Casual Consumer

To be generally active	73%
Maintain/improve mental/health/stress relief	55%
On track to meet their goals	57%
Improved fitness level through pandemic	35%

	Workouts	Frequency	Gym Frequency	On their own	Own Equipment	Membership	Gyms/Clubs
Routine Lifers		More than 12x a month **52%**	More than 12x a month **35%**	Prefer solo workouts **83%**	Purchase At-home equipment **33%**	Big Box Gyms **33%**	Prefer to workout in gyms/clubs **21%**
Wellness Lover		More than 12x a month **55%**	More than 8x a month **34%**	Prefer solo workouts **63%**	Purchase At-home equipment **61%**	Big Box Gyms **49%**	Prefer to workout in gyms/clubs **25%**
Fitness Explorer		More than 12x a month **39%**	More than 4-8x a month **40%**	Prefer solo workouts **64%**	Purchase At-home equipment **71%**	Big Box Gyms **51%**	Prefer to workout in gyms/clubs **16%**
Casual Consumer		Less than 4x a month **27%**	Less than 4x a month **45%**	Prefer solo workouts **88%**	Purchase At-home equipment **35%**	Big Box Gyms **16%**	Prefer to workout in gyms/clubs **10%**

Top Persona Picks by Our Experts

"**Wellness Lovers** - because coming out of pandemic, people are thinking more about mental acuity and living a more fulfilled life."

Mark Williamson
Co-founder
ClubIntel

"I think there is a tremendous amount of upside with the **Fitness Explorers**. From not only a retention and ancillary revenue standpoint, but also as enablers."

Lee Robinson
National Sales Director
ABC Fitness Solutions

"It's a close tie, but **Fitness Explorers**. It's a challenge for us and it's a whole new generation of members that are willing to invest in auxiliary services."

Kelly Thorne
Vice President
Movati

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 processes, and operational programming. The most successful, most profitable clubs understand their customer and turn that knowledge into a personal connection. Our data makes that happen.

Insight Inspiration Impact

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