



FITNESS  
SOLUTIONS

# ACTIONABLE INDUSTRY INSIGHTS FOR 2023

## TOP CEO'S WEIGH IN

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Part III – 2022 Market Research Report



# TABLE OF CONTENTS



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**Introduction**

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**Key Findings From Entire  
Market Research**

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**Member Journey: From Joining  
to Rejoining**

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**Big Box Gym Usage Summary**

# INTRODUCTION

The goal of any health club or gym is to connect with consumers wherever they may be on their fitness journey.

Whether they are prospects, members, or previous members, as a club operator you want to understand their behaviors and motivations to best engage with them.

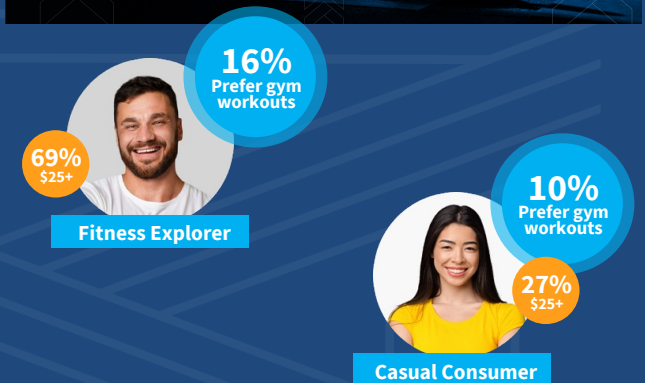
The member journey goes from *joining* to *cancelling*, hopefully back to *rejoining*. We have data that shows insights into this entire journey that we are excited to share with you.

We've also included perspectives that we gathered from the industry's top CEOs when we presented this data at the *Club Industry CEO Summit*.

This document is the third installment of our *2022 Market Research Report*.

Be sure to read:

- [Part I | How to Optimize Personalization Through Fitness Personas](#)
- [Part II | What Members Want: The Data Behind Member Motivation](#)



# KEY FINDINGS

FROM ENTIRE MARKET RESEARCH REPORT

**CEO Insight:** *“When exploring more holistic ways to incorporate mental health and nutrition into my operations, it’s not always additive like a program. It’s finding ways to incorporate them into everything we do, including how we present ourselves.”*

## HEALTH & WELLNESS DEFINITION

Consumers have broadened their definition of health and wellness from physical fitness to include mental health and acuity

## OUTDOOR & ONLINE ACTIVITIES

Outdoor activities and digital/online workouts were the dominant go-to workout regimens during the pandemic

## FITNESS CLUBS OFFERINGS

Offer the most relevance to active consumers (cardio equipment training, flexibility/stretching, free-weight training, equipment-based exercise classes, and health/wellness coaching)

## MEMBERSHIP CANCELATIONS

Most consumers who canceled gym memberships during the pandemic will likely rejoin

**CEO Insight:** *“Understanding how members value mental health is a significant change that needs to be acknowledged and responded to.”*

A close-up, low-angle shot of a person's hand gripping a black kettlebell. The person is wearing dark athletic shoes. The background is a gym floor with a grid pattern. The entire image has a blue color cast. The text 'MEMBER JOINS' is overlaid in the center-left area.

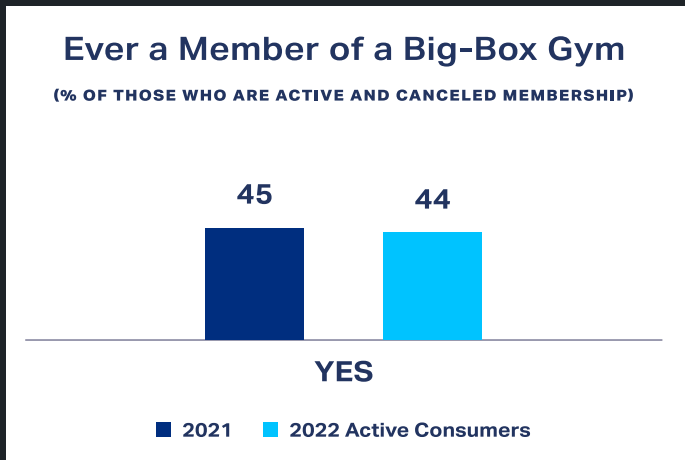
# MEMBER JOINS

# WHY JOIN A BIG-BOX GYM?

Among consumers who are not currently a member, 44% claim they were a member in the past, which is similar to 2021.

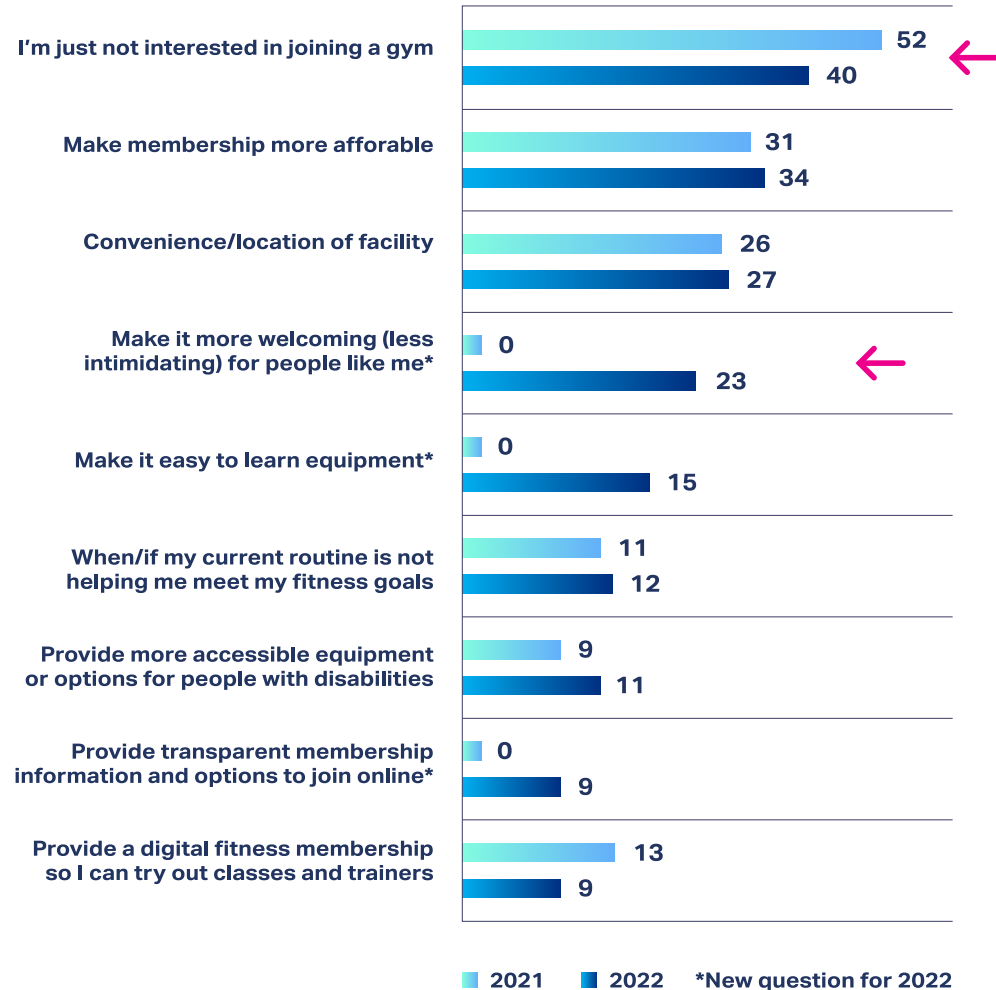
Of those who have never been a member, the majority simply are not interested (40%). This is actually great news, as the number of uninterested consumers has dropped from 2021 by 12 ppt.

Affordability and convenience remain the necessity to attract and encourage membership. An interesting ingredient added to the mix, however, is making the club more welcoming and less intimidating for new members.



## Factors to Encourage Joining a Big-Box Gym

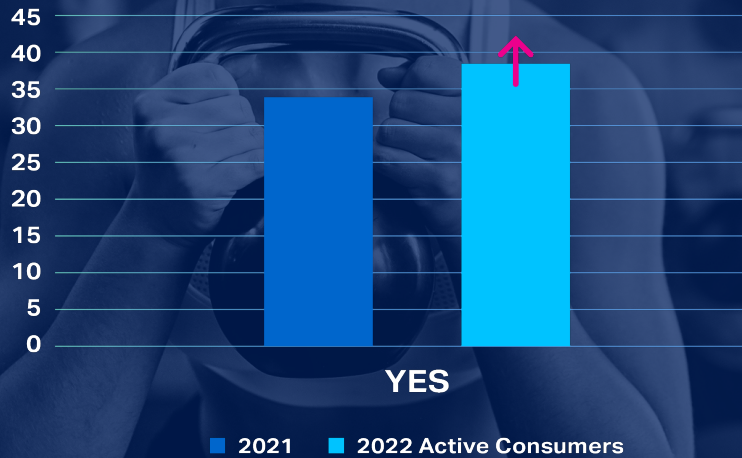
(% MULTI-CHOICE AMONG THOSE WHO ARE ACTIVE AND NEVER BEEN A MEMBER)



# MORE CONSUMERS ARE BECOMING GYM MEMBERS

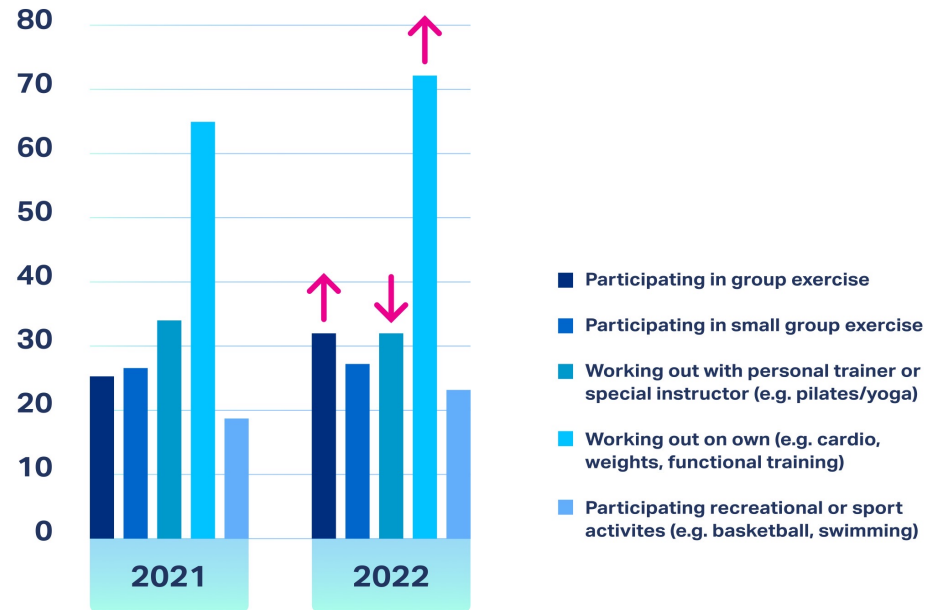
## Member of a Big-Box Gym

(% OF THOSE WHO ARE ACTIVE)



## Primary Gym Activity

(% MULTI-CHOICE AMONG THOSE WHO ARE ACTIVE AND MEMBERS)



# MOTIVATING NEW JOINS

WHAT YOU CAN AND CAN'T CONTROL

## UNCONTROLLABLE

- “Just Not Interested”  
(dropped by 12pt in last 12 months)

## CONTROLLABLE

- Affordability
- Build into a routine
- Not intimidating and make it easy for me to learn



# PROMOTIONS THAT GAIN INTEREST

**CEO Insight:** *“We’re focused on earning our members’ trust through transparency.”*

## FLEXIBILITY

- Membership options
- Price points
- Contract options

## TRANSPARENCY

- No gimmicks
- Straightforward pricing
- No playing games

## TRIAL

- Limited trial
- Try before you buy
- Experience before committing

**CEO Insight:** *“Members want the convenience of click to join and cancel but that eliminates making the personal relationships within our four walls. It’s an interesting point of view and the business side of it leads to questions we need to answer.”*

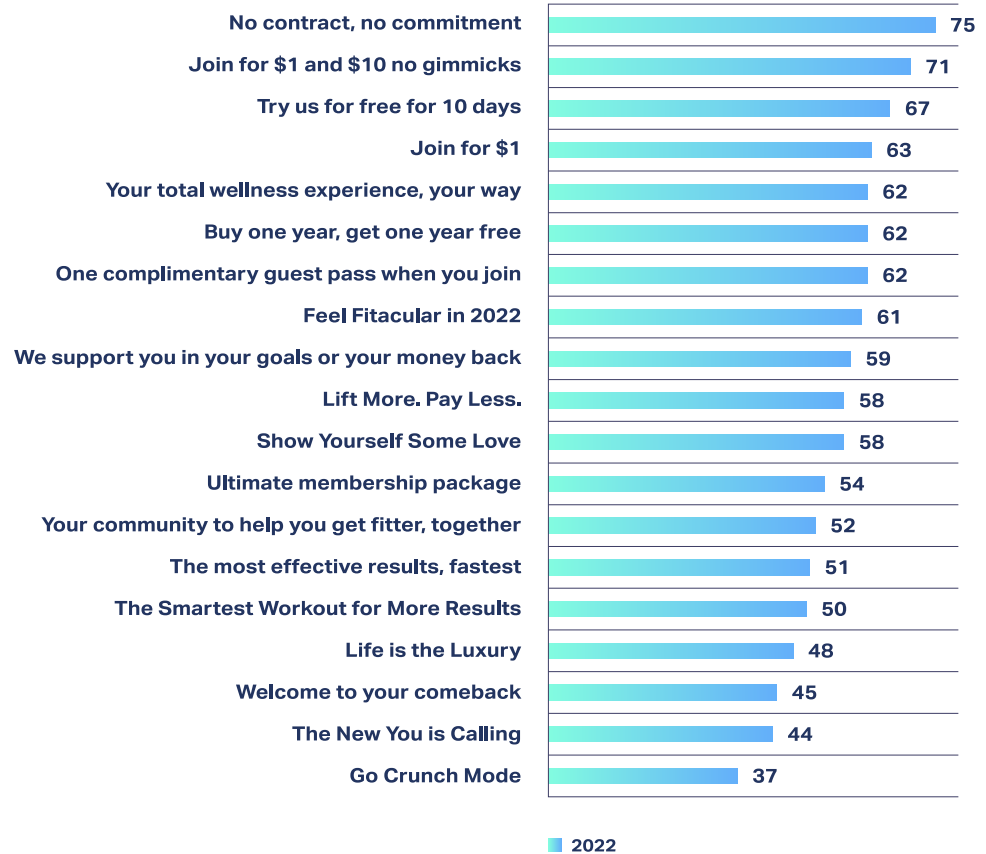
# NEW MEMBER PROMOTION

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), 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.

**CEO Insight:** *“Knowing the consumer is not looking for gimmicks, wants straightforward pricing, and free trials means looking at our sales and marketing in a whole new way.”*

## Appeal of Campaign/Offer to Join a Health Club

(% OF VERY/SOMEWHAT APPEALING AMONG ACTIVE CONSUMERS)





# GYM USAGE AND PERCEPTION

**CEO Insight:** *“It’s never been more important than now to surprise members with value.”*

ABC

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# HUB OF FITNESS STACK

**CEO Insight:** “Your business model has to focus on what you are trying to provide to members.”

# 38%

## ACTIVE CONSUMERS

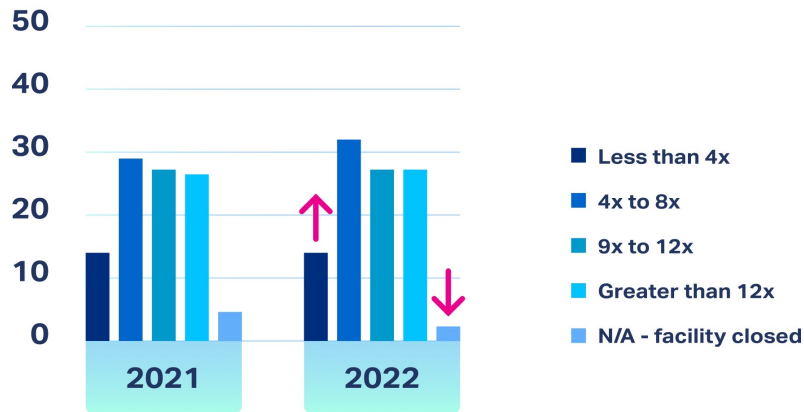
Who hold big-box gym memberships

<b>1</b>	<b>2</b>	<b>3</b>	<b>4 TIED</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>
<b>OUTSIDE FITNESS</b>	<b>AT-HOME FITNESS</b>	<b>FREE ONLINE FITNESS</b>	<b>HEALTH CLUBS</b>	<b>SPORTS ACTIVITIES</b>	<b>DIGITAL-ONLY PROGRAMS</b>	<b>STUDIO CLASSES</b>	<b>IN-PERSON PERSONAL TRAINER</b>
<ul style="list-style-type: none"><li>• Biking</li><li>• Hiking</li><li>• Running</li><li>• Walking</li><li>• Rollerblading</li><li>• Climbing</li></ul>	<ul style="list-style-type: none"><li>• Peloton</li><li>• Mirror</li></ul>	<ul style="list-style-type: none"><li>• YouTube Workouts</li><li>• Fitness influencers</li><li>• Instagram</li></ul>	<ul style="list-style-type: none"><li>• Health Club</li><li>• Big-Box Gym</li></ul>	<ul style="list-style-type: none"><li>• Leagues</li><li>• Volleyball</li><li>• Pickleball</li><li>• Basketball</li><li>• Tennis</li><li>• Golf</li></ul>	<ul style="list-style-type: none"><li>• Daily Burn</li><li>• Les Mills on-demand</li><li>• Obe Fitness</li><li>• Beachbody</li><li>• Apple Fitness+</li></ul>	<ul style="list-style-type: none"><li>• SoulCycle</li><li>• Barre</li><li>• Pilates</li><li>• F45,</li><li>• Orangetheory</li><li>• Fitness</li><li>• Crossfit</li></ul>	<ul style="list-style-type: none"><li>• Not affiliated with a gym membership</li></ul>

**CEO Insight:** “Being at the hub of the fitness stack isn’t about doing all of the 8 categories. It’s about focus on the unique value proposition and doing a few really well.”

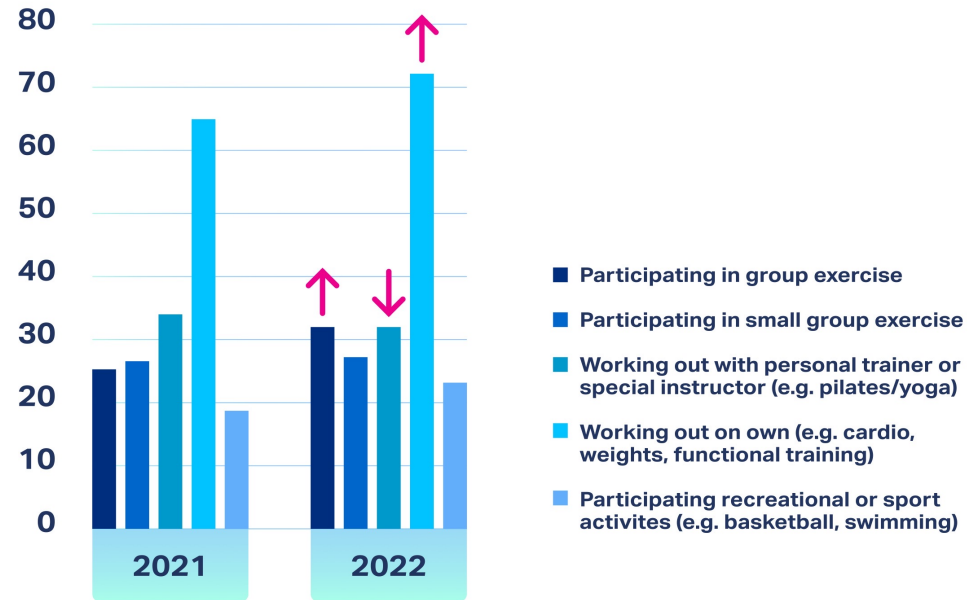
## Frequency of Monthly Gym Visits

(% AMONG THOSE WHO ARE ACTIVE AND MEMBERS)



## Primary Gym Activity

(% MULTI-CHOICE AMONG THOSE WHO ARE ACTIVE AND MEMBERS)



# GYM FREQUENCY

Those who workout between 4 and 8 times a month show a 2 ppt increase. And interestingly, those who claim they couldn't workout due to gym closure declined by 2 ppt, down to only 2% of the active consumer's markets.

When in the gym, the regimen of choice is to workout on their own (up 7 ppt from 2021). GroupX classes also show a nice increase, up 6 ppt. However, personal training shows a dip of 3 ppt.

**CEO Insight:** “Seeing the 8 different categories of fitness that our consumers are utilizing was like seeing 8 different opportunities.”

# PROGRAM IMPORTANCE

Active consumers were asked to rate the importance they place on fitness/wellness programs, services and training options. The top five options remain similar to 2021.

However, a couple of areas have gained in importance:

- 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 options

**CEO Insight:** "Adding flexibility with a functional training program could free up floor space to prevent cancellations."

## Importance of Fitness/Wellness Programs, Services and Training Options

(MEAN SCORES AMONG ACTIVE USERS: 7=VERY IMPORTANT)



# PROGRAM TRENDS AND WANTS

**CEO Insight:** “Seeing flexibility and stretching as the top trend was a surprise and surely actionable intelligence to act upon right away.”

## FLEXIBILITY STRETCHING

TOP  
1  
2022

## FUNCTIONAL RESISTANCE

TOP  
5  
2022

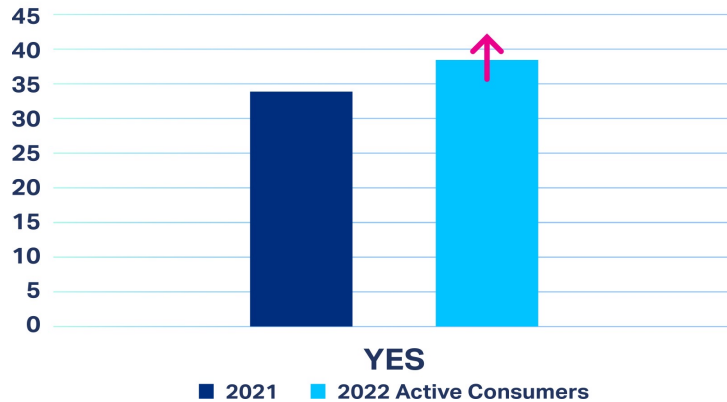
## MEAL TRACKING

TOP  
10  
2022



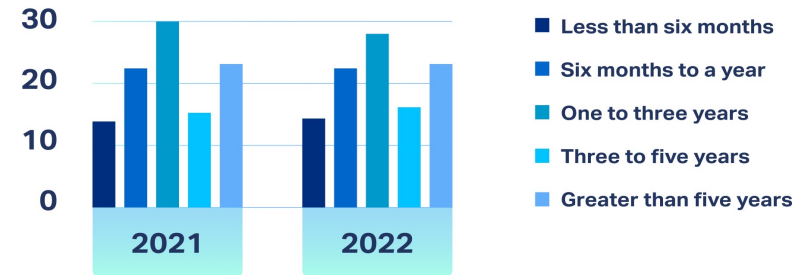
## Member of a Big-Box Gym

(% OF THOSE WHO ARE ACTIVE)



## Tenure at Big-Box Gyms

(% AMONG THOSE WHO ARE ACTIVE AND MEMBERS)



# MEMBERSHIP RATES

Membership rates at Big-box gyms have increased among active consumers to levels higher than 2021. Considering there appears to be lower participation/usage in health clubs than in 2021, the increase in membership rates is remarkable.

The length of tenure among this year's active consumer is very similar to previous years, with only a directional increase in those who are new to the market (14% who state they have joined within the past six months versus 13% in 2021).



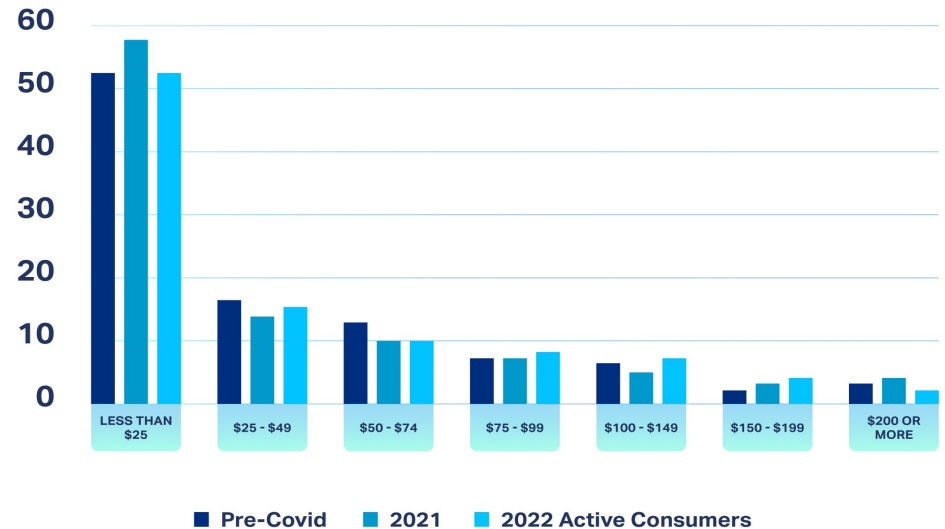
# ACTIVE CONSUMER WALLET SPEND

**53%**  
SPEND  
> \$25/mo.

**19%**  
SPEND  
\$75-199

## Monthly Exercise Expenditures

INCLUDES THE COSTS OF MONTHLY DUES, PT FEES, DIGITAL FITNESS, CLASS FEES, ETC  
(% AMONG THOSE WHO ARE ACTIVE)





# MEMBER CANCELATIONS

# WHY MEMBERS CANCEL

WHAT YOU CAN AND CAN'T CONTROL

## UNCONTROLLABLE

- Financial budget
- Relocation

## CONTROLLABLE

- Health and safety protocols
- Lack of use | other obligations
- Too crowded | intimated | lack of diverse equipment

# MEMBERSHIP CANCELATIONS

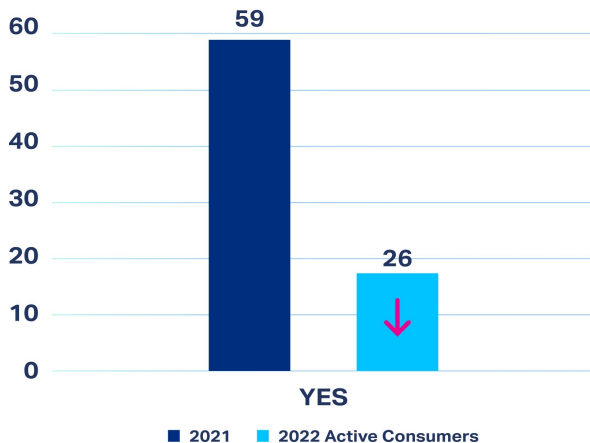
During the pandemic months, the industry experienced significant cancellations as never seen before, with nearly 60% of members stating they canceled their membership. A turning point has occurred, as cancellations have been cut nearly in half from 2021, down to 26%.

The top reasons for canceling are not within the club's control -- financial hardship and relocation. These two reasons for canceling have been primary for years, well before the pandemic.

Another key reason for resigning that garners attention, and is definitely within the club's purview, is establishing and adhering to health/safety protocols. This is the third most cited reason for canceling memberships.

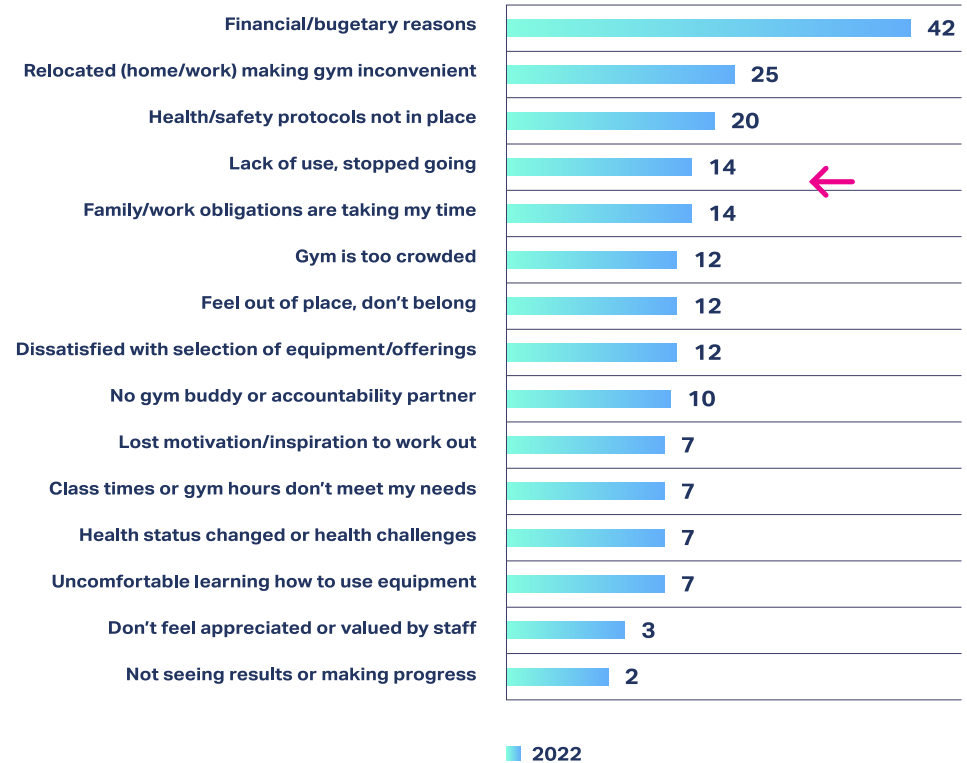
## Canceled/Not Renewed Big-Box Gym Membership in Past 12 Months

(% OF THOSE WHO ARE ACTIVE AND HAVE BEEN A MEMBER)



## Reasons for Canceling Membership

(% OF THOSE WHO ARE ACTIVE AND CANCELED MEMBERSHIP)



■ 2022

A man and a woman are sitting on the floor in a gym, looking at a tablet together. The man is on the left, leaning forward, and the woman is on the right, smiling. They are both wearing athletic wear. The background shows gym equipment and a window. The entire image has a blue tint.

# MEMBER REJOINS

# MOTIVATION TO REJOIN

FROM ENTIRE MARKET RESEARCH REPORT

**CEO Insight:** *“With there being more categories of fitness than ever before, it is more important than ever to reach beyond the 4 walls of your club to engage with members where they are.”*

## TOOLS

Provide accountability tools to help me meet my goals

## PROGRAMS

Offer programs to address both mental and physical wellness

## TONE

Set a tone within the gym using positive, empowering messaging

## NUTRITION

Provide nutrition coaching and counseling/meal tracker

## DIVERSITY

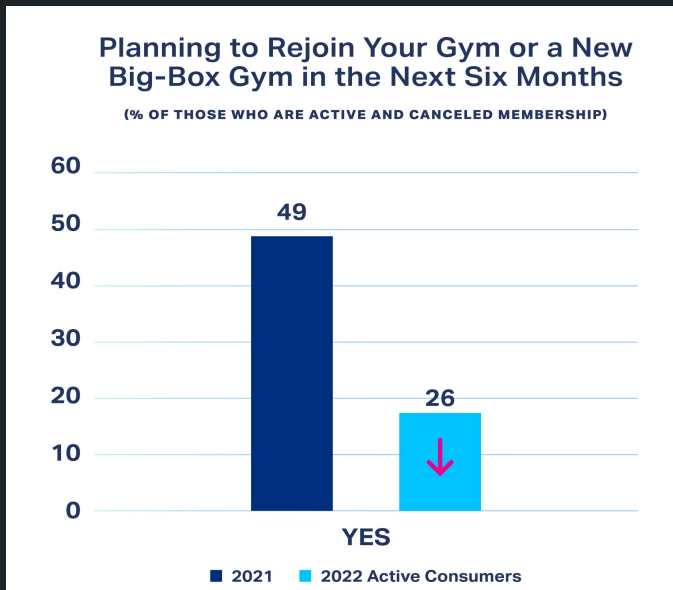
Be inclusive and representative with diverse marketing imagery

# WHY RE-JOIN A GYM?

Although nearly half of those who canceled their membership in 2021 said they would rejoin, that number has dropped to 26% in 2022.

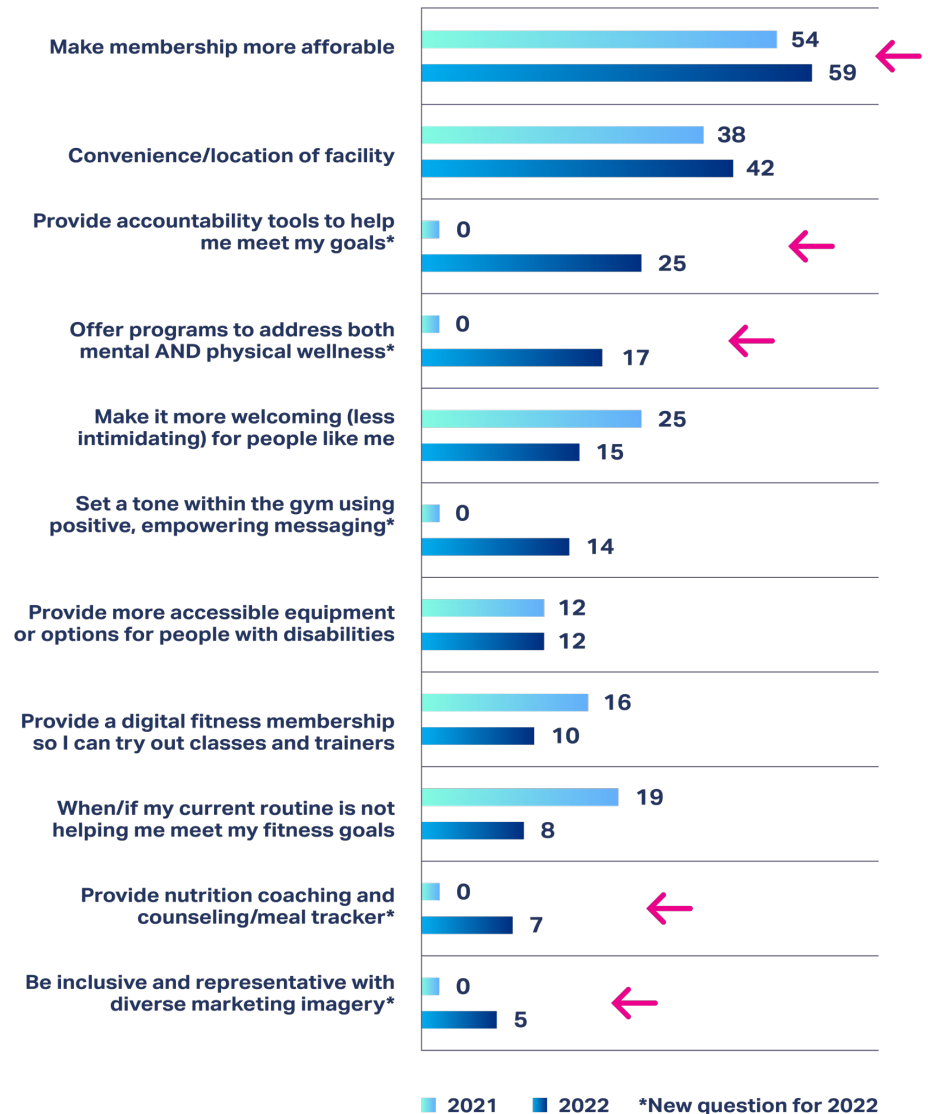
Similar to why Members resigned, they need affordable and convenient options (both of which show increases in importance from 2021).

Providing accountability tools and offering programs to address both mental and physical wellness also garner significant consumer interest.



## Most Important Factors to Encourage Joining a Gym

(% MULTI-CHOICE AMONG THOSE WHO ARE ACTIVE AND NEVER BEEN A MEMBER)



■ 2021 ■ 2022 \*New question for 2022

# BIG BOX GYM USAGE SUMMARY

23%

**REASON FOR  
NON-MEMBERS  
TO JOIN**

Make Gym More  
Welcoming

20%

**REASON FOR  
CANCELING**

Gym lacks health  
& safety protocols

59%

**WOULD RE-JOIN**

If membership was  
more affordable

72%

**NO.1 ACTIVITY**

Working out on own



31%

**NO.2 ACTIVITY**

Group Exercise Classes





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Email: [info@abcfitness.com](mailto:info@abcfitness.com)

Website: <https://abcfitness.com>

Phone: 866-364-4596