

The Hottest Trend in Fitness

Pete Borchert

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Pete Borchert

Director of Product Development
Precor Strength Division



- An Industry's Challenge
- Five Discoveries
- Applying Insights

Challenged to balance our portfolio



Innovating in North Carolina



There is a lot of buzz



A comprehensive, quantitative study

Respondent Profile

- Current gym member for more than 3 months
- Workouts at least once a week at the gym
- Average time to complete online survey: 23 minutes

Respondent Distribution

| | Men | Women | Total |
|--------------|------------|------------|-------------|
| 18-24 | 100 | 100 | 200 |
| 25-34 | 100 | 100 | 200 |
| 35-44 | 100 | 100 | 200 |
| 45-54 | 100 | 100 | 200 |
| 55+ | 100 | 100 | 200 |
| Total | 500 | 500 | 1000 |

S3.Are you currently a member of a gym, health club, YMCA/YWCA, YMHA/YWHA or a community center which offers fitness programs and/or workout equipment?

S8. How long in total have you belonged to a fitness facility?

S9.How often do you work out, or participate in classes or fitness programs?



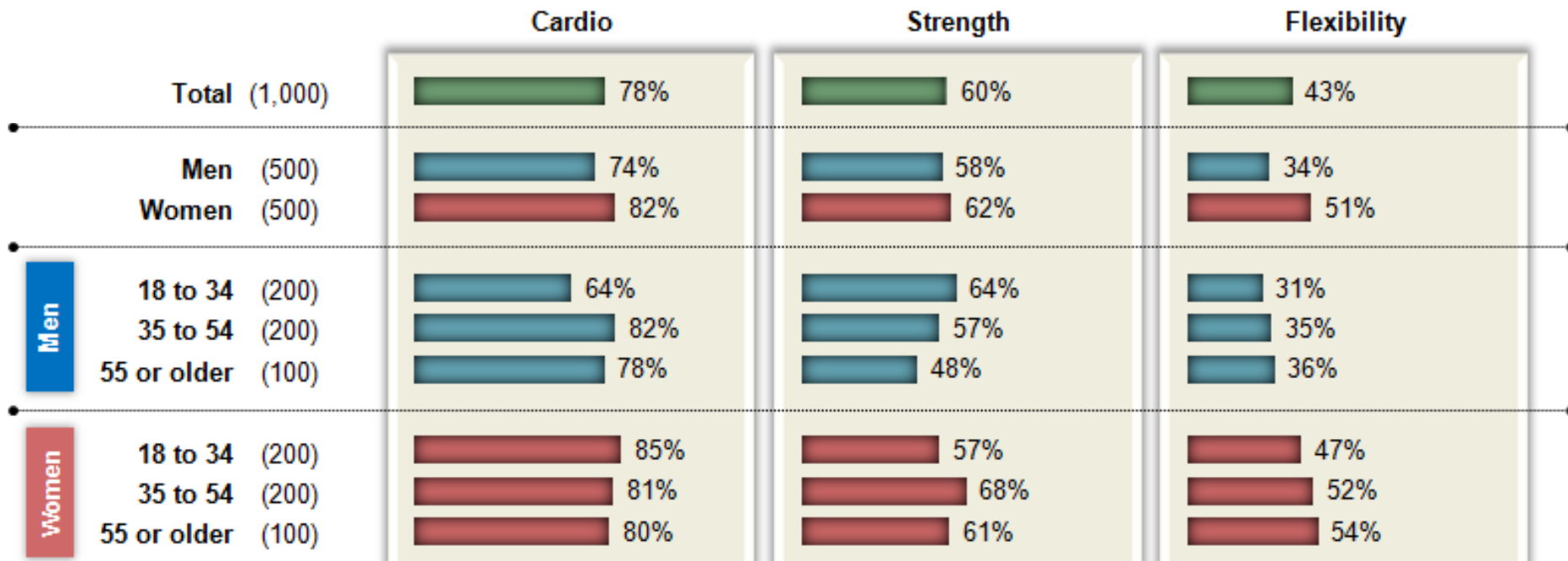
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Five Discoveries



Importance of 3 elements to exercisers

(Rated 10, 9, 8 on 10-pt Scale)



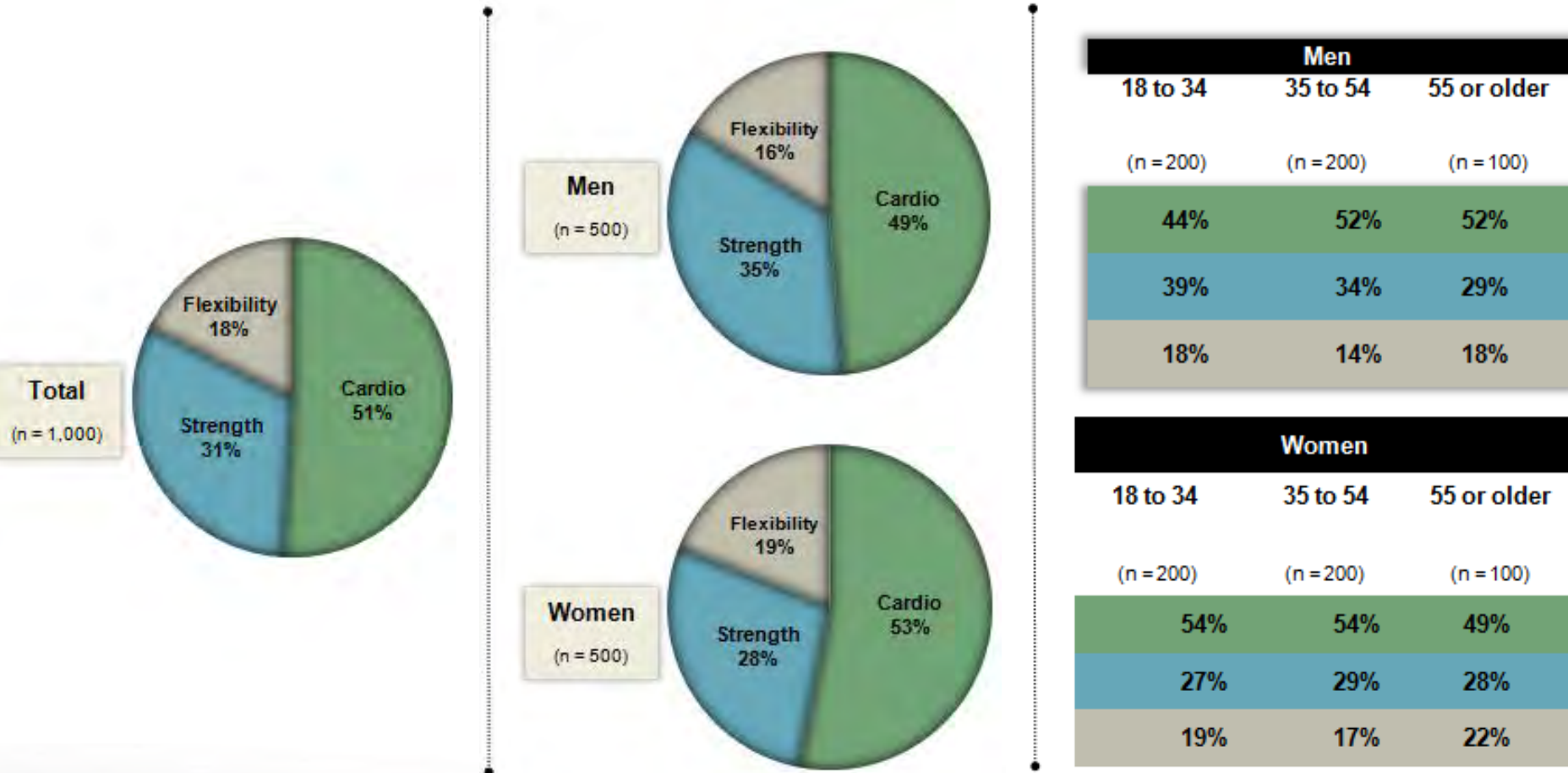
Q3. Using a 10 point scale where 10 equals 'extremely important' and 1 equals 'not at all important', please rate the following areas of fitness and exercise in terms of how important they are to you personally in contributing to your overall physical fitness.

Five Discoveries

It is
surprising
who is
interested

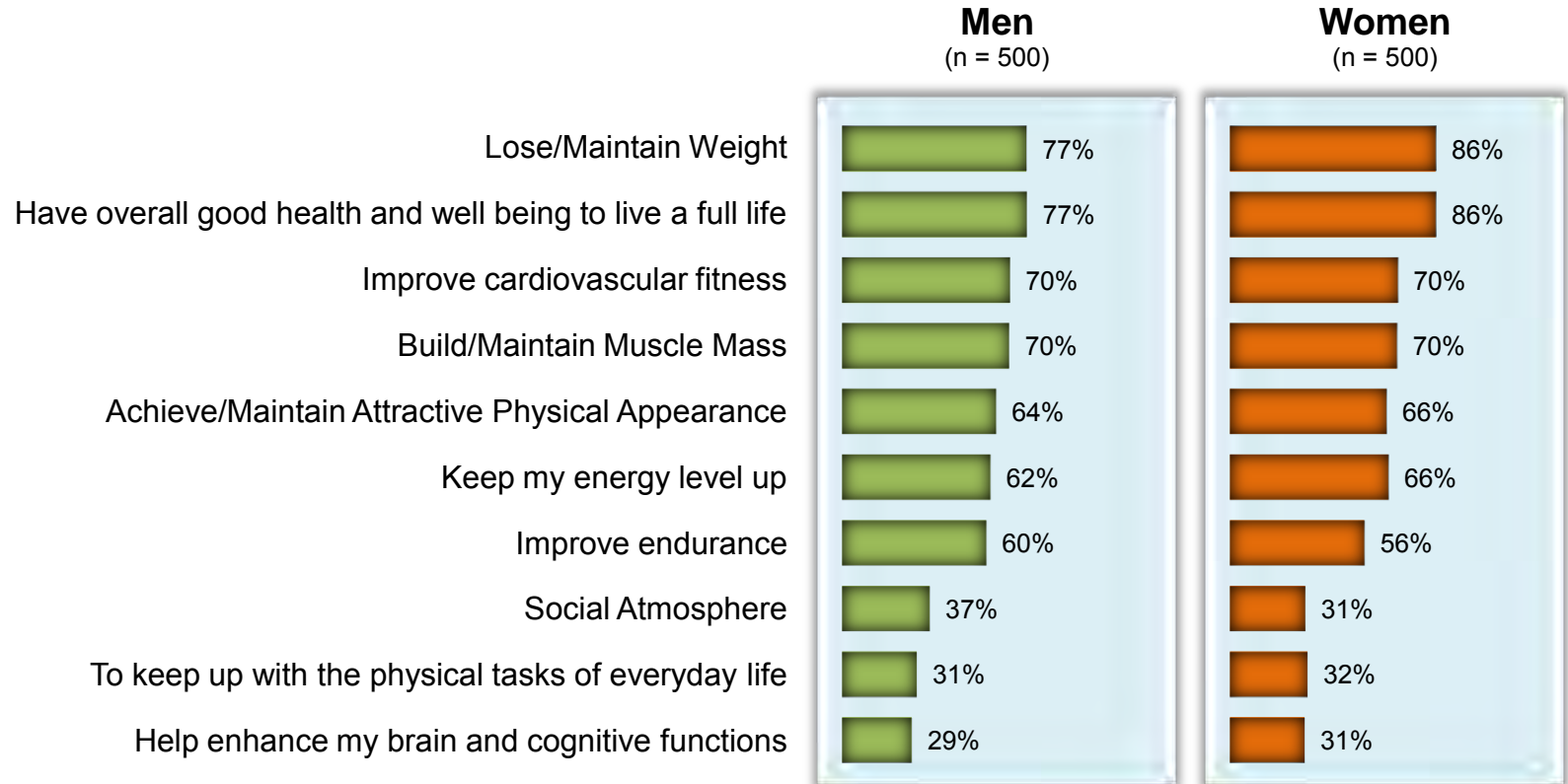
Interest
does not
equal action

Share of 3 elements in exercise regimen



Q4. In your own fitness routine/regimen, how much time and focus do you personally give to each of these three areas? Please provide your answer by allocating 100 points among the three areas. If you don't participate in a given area, type in the number "0." Keep in mind that the total must add up to 100.

No surprise. Weight control is important



Q1. Below are reasons people go to fitness centers. Please indicate the reason(s) you go
Respondents selected from a list of 22 reasons or entered other and specified

Five Discoveries

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Interest
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Explored engagement with 19 techniques

| | | |
|---------------------------------|--|------------------------------|
| Bars (Dip, Pull up, Monkey) | Free weights | Plate loaded machines |
| Benches | Heavy bags | Resistance bands |
| Body exercise with no equipment | High intensity DVD like P90X or Insanity | Sandbags |
| Bootcamp classes | Les Mills classes | Selectorized machines |
| Cable crossover | Medicine balls | Smith machine |
| Cross Fit | Multi-station | Suspension training like TRX |
| Exercise Balls | Plate loaded machines | |

Consistent questions for all 19 techniques

- Are you aware or familiar?
- Have you ever used?
- Are you currently using?
 - If so, for how long?
 - If so, how satisfied are you?
- How safe is it to use?

Five Discoveries

It is
surprising
who is
interested

Interest
does not
equal action

They try
many things

Awareness is generally high

Percentage Who Are Aware / Familiar

| | Total | Male | Female |
|-----------------------------------|-------|------|--------|
| Free Weights | 99 | 98 | 99 |
| Body exercises using no equipment | 98 | 97 | 99 |
| Bars (Dip, Pull Up, Monkey) | 98 | 98 | 98 |
| Resistance Bands | 98 | 98 | 98 |
| Exercise Balls | 97 | 96 | 98 |
| Benches | 96 | 96 | 96 |
| Medicine Balls | 95 | 96 | 94 |
| Heavy Bags | 95 | 97 | 93 |
| Bootcamp classes | 94 | 92 | 95 |
| Plate Loaded Machines | 93 | 96 | 90 |
| Selectorized Machines | 93 | 94 | 91 |
| Multi-Station | 92 | 94 | 90 |
| High Intensity DVD | 92 | 92 | 92 |
| Cross Fit classes | 85 | 88 | 82 |
| Sandbags | 82 | 87 | 77 |
| Suspension Training | 73 | 78 | 67 |
| Cable Crossover | 71 | 81 | 60 |
| Les Mills classes | 54 | 58 | 50 |
| Smith Machine | 44 | 56 | 32 |

Q22. For each of the following please indicate your level of familiarity and usage.

Eight techniques have over 50% trial

| | Total | Male | Female |
|-----------------------------------|--------------|-------------|---------------|
| Body exercises using no equipment | 86 | 85 | 87 |
| Free Weights | 86 | 86 | 85 |
| Selectorized Machines | 71 | 74 | 68 |
| Benches | 66 | 77 | 55 |
| Resistance Bands | 66 | 60 | 71 |
| Plate Loaded Machines | 63 | 70 | 55 |
| Exercise Balls | 60 | 50 | 70 |
| Bars (Dip, Pull Up, Monkey) | 51 | 63 | 39 |

... and compare favorably to cardio

| | Total | Male | Female |
|-------------------------|--------------|-------------|---------------|
| Treadmill | 84 | 81 | 87 |
| Upright/Stationary Bike | 72 | 71 | 73 |
| EFX | 71 | 66 | 76 |
| Recumbent Bike | 48 | 43 | 52 |

Q22. For each of the following please indicate your level of familiarity and usage.

Trial is highest with traditional techniques

Percentage Who Have Ever Used

| | Total | Male | Female |
|-----------------------------------|-------|------|--------|
| Body exercises using no equipment | 86 | 85 | 87 |
| Free Weights | 86 | 86 | 85 |
| Selectorized Machines | 71 | 74 | 68 |
| Benches | 66 | 77 | 55 |
| Resistance Bands | 66 | 60 | 71 |
| Plate Loaded Machines | 63 | 70 | 55 |
| Exercise Balls | 60 | 50 | 70 |
| Bars (Dip, Pull Up, Monkey) | 51 | 63 | 39 |
| Multi-Station | 40 | 48 | 31 |
| Medicine Balls | 38 | 37 | 38 |
| Cable Crossover | 31 | 41 | 20 |
| Heavy Bags | 29 | 36 | 21 |
| Bootcamp classes | 28 | 23 | 33 |
| High Intensity DVD | 26 | 24 | 27 |
| Suspension Training | 23 | 26 | 19 |
| Cross Fit classes | 21 | 22 | 20 |
| Smith Machine | 19 | 26 | 11 |
| Sandbags | 17 | 20 | 14 |
| Les Mills classes | 12 | 12 | 12 |

Q22. For each of the following please indicate your level of familiarity and usage.

Satisfaction is high among current users

Percentage of Current Users Who are Very Satisfied or Somewhat Satisfied

| | Total | Male | Female |
|-----------------------------------|--------------|-------------|---------------|
| Benches | 100 | 100 | 99 |
| Free Weights | 99 | 99 | 98 |
| Body exercises using no equipment | 98 | 99 | 97 |
| Medicine Balls | 98 | 97 | 99 |
| Cross Fit classes | 97 | 98 | 96 |
| Selectorized Machines | 97 | 98 | 95 |
| Exercise Balls | 96 | 96 | 96 |
| Smith Machine | 96 | 96 | 96 |
| Plate Loaded Machines | 96 | 96 | 95 |
| Bars (Dip, Pull Up, Monkey) | 96 | 97 | 94 |
| High Intensity DVD | 96 | 91 | 100 |
| Cable Crossover | 95 | 99 | 91 |
| Heavy Bags | 95 | 93 | 96 |
| Resistance Bands | 94 | 93 | 94 |
| Multi-Station | 93 | 95 | 91 |
| Bootcamp classes | 93 | 92 | 94 |
| Suspension Training | 93 | 88 | 98 |
| Les Mills classes | 86 | 78 | 93 |
| Sandbags | 80 | 89 | 71 |

Q28. How satisfied are you with the results you are getting of each of the following?

Five Discoveries

It is surprising who is interested

Interest does not equal action

They try many things

They stay with few things

Drop out rates are high

| | Men | Women |
|---|------------|--------------|
| Average drop out rate across all 19 techniques | 49% | 57% |
| Number of techniques with drop out greater than 50% | 12 of 19 | 14 of 19 |

Drop out rate = # lapsed users / # ever used

Five techniques drop out less than 50%

| | Total | Male | Female |
|-----------------------------------|--------------|-------------|---------------|
| Selectorized Machines | 21 | 17 | 24 |
| Free Weights | 25 | 21 | 28 |
| Body exercises using no equipment | 27 | 27 | 26 |
| Plate Loaded Machines | 39 | 33 | 45 |
| Benches | 47 | 34 | 60 |

... and compare favorably to cardio

| | Total | Male | Female |
|-------------------------|--------------|-------------|---------------|
| Treadmill | 27 | 30 | 25 |
| EFX | 32 | 32 | 33 |
| Upright/Stationary Bike | 51 | 48 | 55 |
| Recumbent Bike | 51 | 49 | 54 |

Q26. How long has each of the following been part of your strength training routine?
Respondents answered selected from range of time

Some techniques are “one and done”

Percentage Drop Out Rate

| | Total | Male | Female |
|-----------------------------------|-------|------|--------|
| Selectorized Machines | 21 | 17 | 24 |
| Free Weights | 25 | 21 | 28 |
| Body exercises using no equipment | 27 | 27 | 26 |
| Plate Loaded Machines | 39 | 33 | 45 |
| Benches | 47 | 34 | 60 |
| Exercise Balls | 51 | 52 | 50 |
| Smith Machine | 53 | 42 | 64 |
| Les Mills classes | 54 | 50 | 58 |
| Bars (Dip, Pull Up, Monkey) | 55 | 46 | 64 |
| Suspension Training | 56 | 54 | 58 |
| Resistance Bands | 56 | 63 | 49 |
| Multi-Station | 57 | 50 | 65 |
| Cable Crossover | 58 | 51 | 65 |
| Medicine Balls | 59 | 59 | 58 |
| Cross Fit classes | 59 | 64 | 55 |
| Bootcamp classes | 62 | 61 | 64 |
| Heavy Bags | 69 | 61 | 76 |
| Sandbags | 72 | 65 | 79 |
| High Intensity DVD | 72 | 71 | 74 |

Q26. How long has each of the following been part of your strength training routine?
 Respondents answered selected from range of time

Traditional techniques have staying power

Percentage of Current Users Who Have Used Consistently for More than 1 Year

| | Total | Male | Female |
|-----------------------------------|--------------|-------------|---------------|
| Body exercises using no equipment | 82 | 85 | 79 |
| Free Weights | 82 | 84 | 79 |
| Selectorized Machines | 81 | 87 | 75 |
| Plate Loaded Machines | 80 | 85 | 75 |
| Benches | 77 | 81 | 73 |
| Smith Machine | 77 | 84 | 70 |
| Exercise Balls | 76 | 76 | 76 |
| Medicine Balls | 72 | 75 | 69 |
| Resistance Bands | 72 | 74 | 69 |
| Multi-Station | 72 | 79 | 64 |
| Bars (Dip, Pull Up, Monkey) | 68 | 79 | 56 |
| Cable Crossover | 67 | 83 | 51 |
| Cross Fit classes | 64 | 65 | 63 |
| Boot camp classes | 62 | 57 | 66 |
| Suspension Training | 60 | 60 | 60 |
| Les Mills classes | 53 | 47 | 58 |
| Heavy Bags | 52 | 59 | 44 |
| High Intensity DVD | 50 | 60 | 40 |
| Sandbags | 44 | 59 | 28 |

Q26. How long has each of the following been part of your strength training routine?
 Respondents answered selected from range of time

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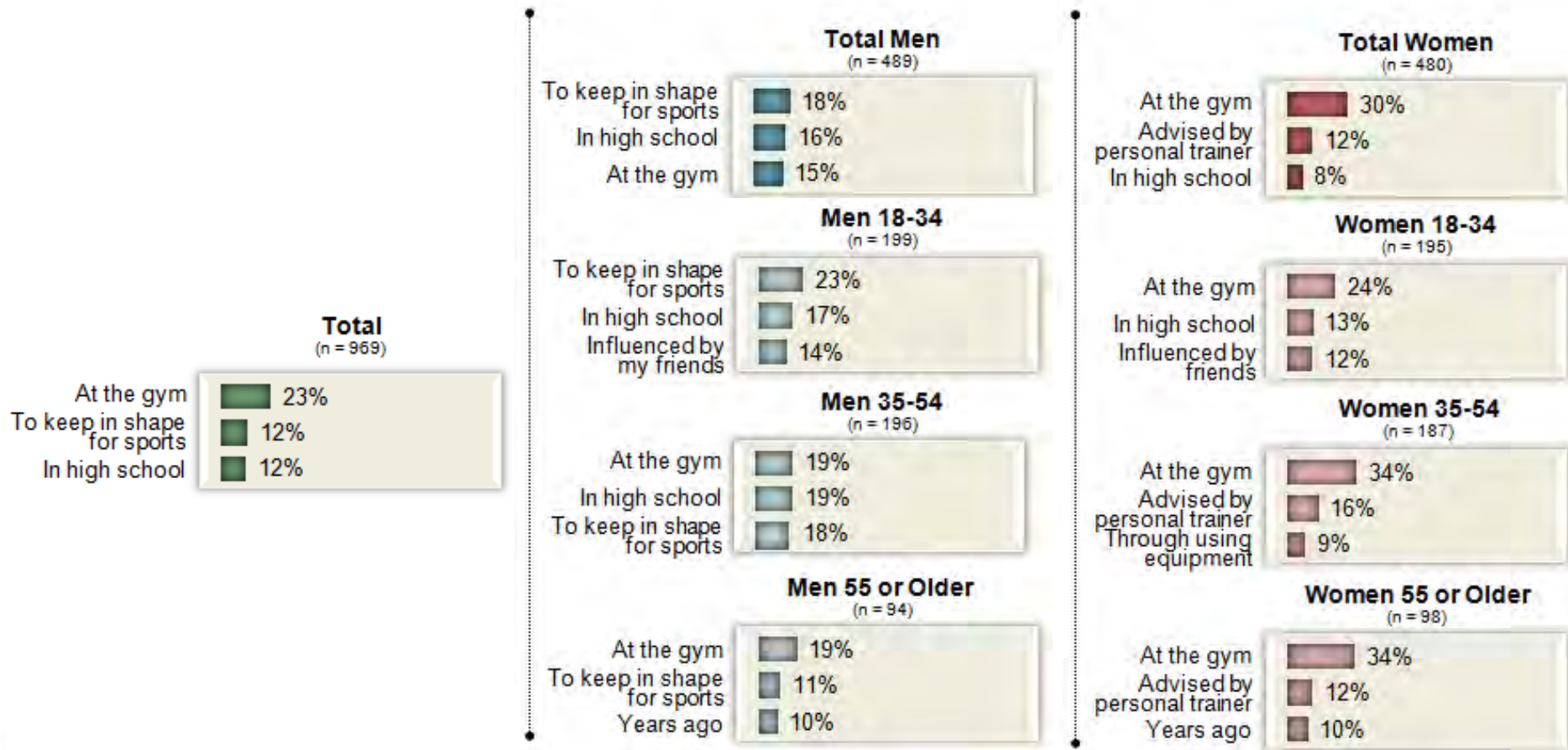
Interest
does not
equal action

They try
many things

They stay
with few
things

They need a strength coach

The gym is often their first look at strength



Q15. How did you first get involved with strength training?
 Open ended question – respondents provided a detail response

Perception of safety is a barrier

Percentage of Gym Members Rating Technique as “Extremely Safe” or “Very Safe”

| | Total | Male | Female |
|-----------------------------------|--------------|-------------|---------------|
| Body exercises using no equipment | 81 | 86 | 76 |
| Resistance Bands | 72 | 71 | 73 |
| Selectorized Machines | 67 | 73 | 60 |
| Exercise Balls | 61 | 59 | 63 |
| Plate Loaded Machines | 57 | 67 | 47 |
| Free Weights | 56 | 54 | 57 |
| Benches | 55 | 59 | 51 |
| Medicine Balls | 55 | 58 | 51 |
| Bars (Dip, Pull Up, Monkey) | 51 | 61 | 40 |
| Cross Fit classes | 50 | 54 | 46 |
| Smith Machine | 50 | 55 | 44 |
| Multi-Station | 49 | 56 | 41 |
| Heavy Bags | 49 | 58 | 39 |
| Bootcamp classes | 47 | 48 | 46 |
| Suspension Training | 46 | 52 | 39 |
| Cable Crossover | 45 | 53 | 37 |
| Les Mills classes | 45 | 47 | 43 |
| High Intensity DVD | 44 | 50 | 38 |
| Sandbags | 42 | 48 | 35 |

Q30. How safe do you consider each of the following?
 Respondents choose from a range of 5 - extremely safe to 1 – not at all safe

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Introducing Discovery Series



Appeals to the most valuable members



Appeals to the most valuable members



Performs for the strongest members





Pete Borchert

Director of Product Development
Precor Strength Division

Q & A

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