



The Future of Fitness:

Insights from across the U.S.

ThoughtWorks®



A Time of Transition

The world has changed dramatically in just a few months, going from crowded bars and tourist spots to nearly world-wide lockdown. While we are still learning about the virus which caused this pandemic, we can clearly see the major impact it has had on our daily lives and the economy.

In the fitness world, gyms are closed and people are actively looking for alternatives; trying everything from Instagram Live and YouTube workouts, to one-on-one Zoom coaching sessions, to using the great outdoors for walking, running, and biking.

It's a brave new world for an industry that's more tied than most to bricks-and-mortar experiences. A few months in, and one thing is clear: online workouts are here to stay and many commercial gyms will need to alter their commercial strategies once restrictions are lifted. The trainers who once worked at these gyms have made their own way and have followers online; gyms may need to compete with them in the future if they don't work with them now.

As economies recover, customer behavior will have changed forever and the post-pandemic era will be a vastly different reality.

So, what does the fitness world need to focus on in order to prepare for the Next Normal? Thoughtworks surveyed 75 people across the United States to learn how their fitness routines have changed and how they see them evolving, and we take a look at what this means for gyms now and in the future.

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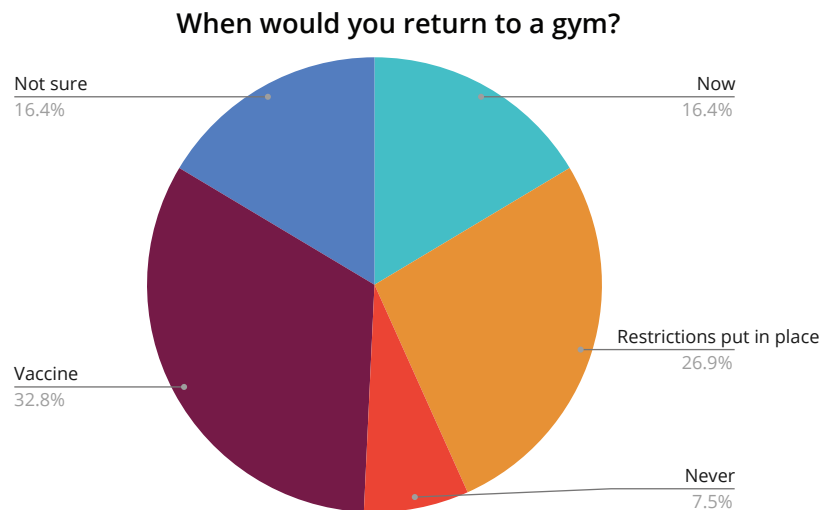
About the Research

We conducted ten 1:1 interviews to gain in-depth insights into attitudes about fitness, concerns about COVID-19 and the impact of one on the other. We also surveyed 75 individuals across the United States with open-ended questions on the same topics and heard from people ranging from accountants to software engineers to writers. Due to the nature of the pandemic, all interviews and surveys were conducted remotely, which limits our respondent base to those with access to high-speed internet and/or mobile data. However, as a gym membership is a discretionary expense, and as we also corroborated the results of our research with other like reports available to the public, we are confident in the value of the findings.

Findings:

Focus on the virtual experience

The rules that determine when a facility can open their doors do NOT determine when people will go through them.



People will go back when they feel safe, but when that is, is a variable:

- One third of our respondents said that they would not return to a gym until there was a vaccine or widespread immunity.
- One quarter said that they would go back if restrictions were put in place (e.g. limiting the number of people inside at one time; heavy-duty cleaning; etc.)
- Only 16% said that they would go back now.
- Another 16% were not sure when they would go back.

This, combined with government-mandated changes such as social distancing and limiting the number of people who can go at one time, will lead to continued financial impact on brick-and-mortar fitness facilities.

Recommendations:

Focus on the virtual experience, creating awesome, revenue-generating digital experiences, and make it easy to share these experiences on social media.

People have already found alternatives to the gym, ranging from buying home equipment to tuning in to video workout sessions. Add in actual restrictions, with safety concerns, and you see that the virtual workout will continue to play an important role even after gyms are allowed to reopen. Gyms that previously relied on their brick-and-mortar experiences need to expand into this digital world if they want to maintain their customer base.

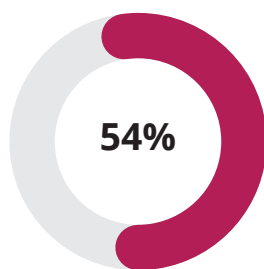
When you consider the fact that every day feels the same and people are not able to travel as much as they did - or in some cases to even go outside - and you also have a healthy desire to break from the mundane, there is an opportunity to harness this by creating virtual experiences that not only provide a workout, but also provide a break and some excitement.

Virtual travel experiences can provide a change of pace and allow people a way to mentally leave their quarantine space. Harness existing technologies such as AR for people to “take selfies” as they virtually bike through Italy or run through Yosemite. Creative achievements and rewards can both keep them coming back and make the experience worth sharing on social media. Explore opportunities to monetize this virtual world.

“Until there's a vaccine... I can stay active at home without gyms/sports facilities. Not worth the risk.”

Catch them while you can:

People are building new habits that they are going to keep.



Plan on keeping at least part of their new routine

Over half of our respondents said that they would keep at least some part of their new routine even after gyms reopen.

People are actively looking for alternatives, and those who are the most “into” something are doing the most work to find a replacement, and once they have a viable replacement, they have little motivation to go back to their earlier mode.

They are actively searching for, finding, and using recorded video sessions, live group video sessions, and live 1:1 training sessions from YouTube, Instagram Live, and Zoom. They are also rediscovering the great outdoors by walking, hiking, running, and biking. The longer they have these new habits, the more ingrained they become, and the less likely they will be to return to their old habits.

Recommendation:

Make these new habits a part of your ecosystem.

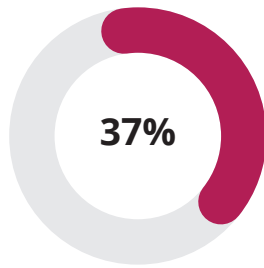
Those gyms that create an omni channel experience - one that spans the home, the gym, and the great outdoors - stand the greatest chance of both keeping their existing customer base and expanding as the world re-opens.

By harnessing the new habits that they have formed, and building the virtual material into your ecosystem, you can bring them back to your brand even before your physical buildings reopen. Creating a single experience to host everything from video workout sessions to tracking walks through the park will centralize their experience and provide more “sticktion” to your brand

“[I] Would keep up the running at home but would add yoga classes.”

Build community:

People miss the energy and camaraderie of group activities.



Community is an important part of their routine

37% of our respondents said that community and energy matter (unprompted). This includes both of the overall energy of others being present in the gym doing their own activities and those taking part in the same activities (e.g. dance or yoga classes)

People are finding, and becoming more accustomed with, online alternatives to the in-gym experience. This means that the community that used to be the physical gym is being replaced by these online communities.

Recommendation:

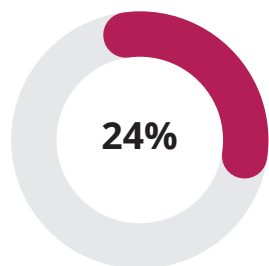
Create ways to maintain this sense of community.

- Video experiences that allow participants to see each other
- Simple ways to share their experiences on social media
- Separate online spaces for different groups as well as an ability to make 1:1 connections that span beyond the workout
- Gamification / rewards to keep them involved in the community

“My best friend and I try to do a workout together about once a week. She leads me in mobility, flexibility, and strength stuff. We usually do between 60 - 90 minutes.”

Spotlight trainers:

People want someone to tell them what to do and how to do it, and these trainers have their own followings.



Want someone to tell them what to do and/or make sure they are doing it right

24% of our respondents said that an instructor or trainer - someone to tell them what to do and how to do it - matters (unprompted). They are actively looking in multiple places and “trying out” new people and workouts to find the right fit for them.

Trainers and coaches have their own self-branded YouTube and Instagram channels and are doing 1:1 Zoom training. People are finding the trainer that they like while their gym is closed.

Recommendation:

Spotlight trainers as a part of your ecosystem and make it easy for people to find the trainer who’s right for them.

Now that the gyms are closed, many trainers are finding their own way, and customers are looking for online workouts, not online gyms. Gyms will need to compete with those trainers when they reopen if they don’t collaborate with them now. An ecosystem that works well for the trainers as well as the customers will allow you to harness their abilities and personalities now while simultaneously laying the groundwork for a fully connected experience in the future. This mutually beneficial ecosystem can be harnessed to create a flywheel for the future: A place that your customers return to for a growing set of fitness resources.

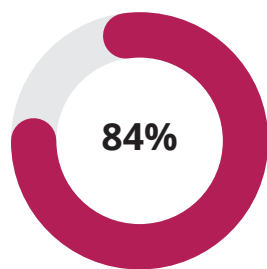
Consider creating a variety of online resources for your customers to draw from. Include both recorded and live workouts as well as both group and individual sessions. Information and tips for out-of-gym activities as well such as cycling and running that can be used while the gym is closed will lay the groundwork for your customers to see you as an overall fitness resource.

And don’t forget to provide technical support for your trainers.

“I am now doing 1:1 coaching for boxing which didn't feel as possible before - it's amazing.”

Highlight Whole Health:

Fitness routines aren't just about physical health.



Mental health is
an important
part of fitness

Over 80% of our respondents said that their fitness routine was about their mental health as well as their physical health: It serves as a reset from the day and a form of meditation, reducing anxiety and stress.

This is especially important now in the age of COVID, as seen in the sharp increase in downloads of health and fitness apps during Shelter in Place.

Recommendation:

Frame your offerings in terms of the mental benefits (both physiological and social) as well as the physical.

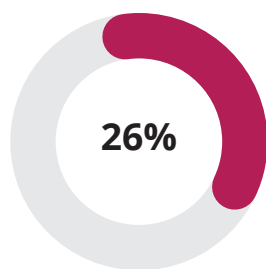
Many people are actively looking for the energy of a community and a break from isolation; live streamed workouts in addition to recorded workouts can help provide this.

Consider adding features to your digital presence that allow people to connect outside of the class, such as communities and forums for connecting with others, sharing workouts, recipes, or just chatting.

“Definitely a combination. Mostly about physical fitness but it also helps me a lot with anxiety and stress”

Reassure them overtly:

People want to know that the gym is clean and safe.



26% of respondents said that they wanted to see restrictions and/or safety equipment in place (unprompted). This included masks and gloves, sanitizing equipment, physical distancing, and restricting the number of people who can be in the gym at one time.

Recommendation:

Update your policies and activities and make them obvious.

If you have a physical location (or home delivery of equipment), you will need to go out of your way to make people feel safe, and this sense of safety will be especially important in this time of high stress. While you need to follow local guidelines, you should also survey your customers to learn their specific concerns.

Remember, your customers will return to a physical gym when they feel safe, which may or may not correspond with when regulations change. Therefore, customer confidence in the safety and cleanliness is as important as the cleanliness itself.

Some of the things that we heard from our respondents on what will make them feel safe:

- Overtly cleaning equipment regularly.
- Limiting both the number of people allowed at one time and the physical distance between equipment.
- The ability to reserve times for equipment/attendance.
- Requirements to wear masks and/or gloves

Clear and visible guidelines will allow customers to feel comfortable being back to the gym, including both what precautions you are taking and when they have been taken (e.g. when equipment has been cleaned).

Don't forget the safety of your staff and trainers! Take the time to understand their needs and concerns as well.

“Confidence in staff testing. Confidence in cleaning.”

The Future of Fitness

So what does the future hold for the fitness industry? Success for fitness companies will result from harnessing the home experience and connecting it to the gym.

Short-term: Home habits



Get them back into your ecosystem.

Once gyms closed, people went looking for alternatives: They wanted exercise, equipment, and trainers, all of which they are finding without a gym. If you want your customers to return to your gym once it reopens, you need to go to where they are now: Online and in the park. **Make the home experience your experience and make it awesome.**

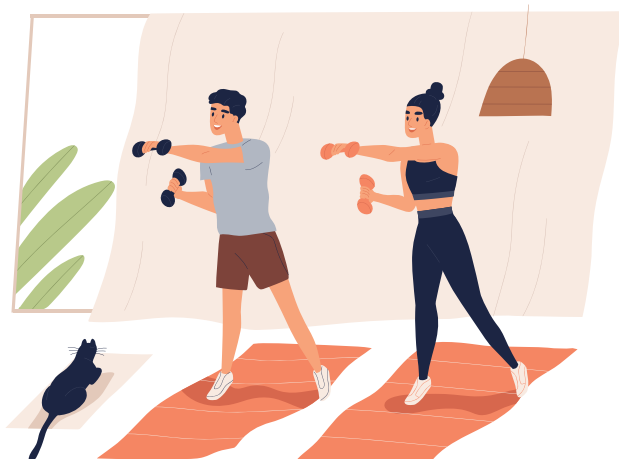
Create a digital presence that includes both recorded and live streaming workouts with options for both groups and one-on-one exercise. Harness the personality power and knowledge of trainers, and provide them with both a platform for showcasing themselves and support to make their online experience a great one.

Incorporate home, outdoor, and other non-gym workouts into your online experience. Suggest hikes, record activity, and provide one-stop shopping to see it all, and share it all. Create online communities and ways to share activities with other existing online communities. Tie all of this to your brand and monetize it.

Create digital experiences that allow them to virtually leave the house: Bike, run, or row through different cities, countries, and national parks (or other planets).

Because people are successfully finding alternatives to the physical gym, it's vital to keep them seeing your name, your equipment, and your brand.

Near-term: Home + Gym connected



Blend home and gym.

When gyms are able to reopen is not when they should stop supporting the home workout; rather, it is when they should expand that experience to connect to the brick-and-mortar gym. Remember: Not everyone will return to the gym all at once, and many plan on keeping at least part of their new routine, so **plan on supporting your customers in both worlds**. You want the transition between home and gym to be as seamless as possible; to be a force that helps bring them back to the gym; and to continue to tie your brand to their home routines.

Survey your customers about what they want to see in place in the physical gym. This will not only tell you what changes your customers want, but also give them the confidence that you are concerned about their health and safety. Use this opportunity to also **understand how their needs and attitudes have changed**: Are they more interested in nutrition centers now? Looking for additional health information? Switched from High Intensity workouts to Yoga and Relaxation? **What they wanted before COVID may be quite different from what they need now.**

For trainers that you have spotlighted, expand your digital offering to include both their “home” workouts and their in-gym sessions. And since the brick-and-mortar gym will need to adapt to new physical requirements (e.g. limited capacity) when it opens, add features to support things such as reserving times for access or equipment, touchless check-in and membership options. If your customers have started using virtual trainers, consider adopting those into your brick-and-mortar environment.

Use the data from usage, class reservations, and check-ins to really understand your customers in this new world. Use your digital presence to survey their needs in general, and to send after-workout surveys to keep in constant touch with their changing needs. As the world continues to change, so will your customers’ wants and needs.

Future: Travel gym



Scale your ecosystem.

Once the travel world opens up, keep them connected away from home with hotel experiences connecting smoothly to home and gym. People who have been saving money while sheltered in place will want to travel again, and you want them to take you along. The ecosystem that you built while they were at home can be expanded to embrace the experience while they are away: Video sessions, trail finders, hotel room workouts, etc. can be used on the road as well as they could in quarantine. **Form partnerships with hotel chains to include your equipment, devices, and other offerings in their gyms.** Make it easy for them to not only track their workouts but also to share their travel experiences.

About ThoughtWorks

Founded over 25 years ago, ThoughtWorks has grown from a small team in Chicago to a leading global software consultancy of more than 7000 ThoughtWorkers in 43 offices worldwide. At ThoughtWorks, we have a holistic approach to ensuring you get the most out of your investments

- from legacy modernization to impactful customer experiences
- it's all in how we think about value.

We are leaders in building exceptional experiences that customers love, following a design-led and data-informed approach to building intuitive, game-changing experiences for both our clients and their customers. We integrate strategy, design, and complex tech rather than just deliver each part in isolation.

We've pioneered techniques that harness the power of global teams to deliver software excellence at scale. Our distributed teams across the globe provide access to a broad range of technology capabilities, to help you think big, move fast, and deliver value with the right skills at the right time.

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