THE QUICKEST PIVOT IN BUSINESS?

A study of the fitness industry's transformation to online classes

Proinsight™

COVID-19 LOCKDOWN 2020 REPORT FROM PROINSIGHT

Executive Summary

COVID-19 has presented challenges for business and business leaders across the globe. The health & fitness, and wider leisure sector has been hit particularly hard by the pandemic. On Friday 20th March 2020 the Prime Minister brought in tough social distancing measures closing all gyms & leisure centres (along with bars, pubs, clubs, restaurants, cinemas and theatres).

Faced with unprecedented levels of uncertainty, all leisure centre and gym operators were forced to freeze or suspend memberships for the 10.4milllion UK people that hold memberships with no idea when they would re-open their doors again.

Many of these operators already had a growing digital presence, but with the forced 'lockdown' came the need for operators to fasttrack these programmes. For many operators the idea of running a 'live' Facebook or Instagram class pre-20th March 2020 would just not have been on their horizon.

This report seeks to show just how well our sector has successfully pivoted into a new space in a matter of days.

We completed mystery shops from 50 different operators on their digital classes. Our shoppers reviewed the branding, instruction, exertion levels and digital experience. The key finding from the feedback was the inconsistency of delivery; they took part in some incredible businesses run by motivated and passionate instructors, but many have huge opportunities to improve virtually all aspects of the experience.

Just two of the operators scored above 90% in our mystery shop, which is an incredible person. Especially given the very short lead-in time many operators had. The average mystyer shop score was 62.3%, a vast difference to those top 2 scorers. Each operator style varied, the mystery shop criteria was set to measure a wide of a coverage as possible and the results give the industry a sense of how well digital classes were are being delviered across the sector in the UK.

10.4 million
Fitness Memberships Frozen

Over 50
Mystery Shops Completed

62.3%
Average Score

Going forward operators will need to ask themselves a couple of key questions.

1. Who is the target audience?

Do they wish this to be a member only added value offering or a product for a wider audience?

2. What is the intended outcome?

Are they focused on retention and building a community or seeing it as an opportunity to widen the reach to attract new members (for full or online membership)

Despite the mystery shop scores, it is clear that when the industry turns its hands to something, it has got passion and drive in abundance. Perhaps once the dust has settled on this terrible pandemic, operators will look very closely at their digital classes and inject budget into training, delivery and measurement as the consumers demands are likely to be very different to pre 20th March 2020.

David Hopkins
Managing Director and Founder
of Proinsight Research Ltd

THE **WHY**

By mid-March 2020 many leisure operators could see that the writing was on the wall with regards to **COVID-19** and it was likely that leisure centres, fitness clubs and gyms would be **forced to close their doors** for a period of time to keep the nation safe.

Most operators, while freezing memberships, have encouraged members to be active by offering access to online classes and workouts via a **variety of digital channels,** ensuring that they were able to continue to **exercise while 'away' from their club/centre.** The operators content varies considerably with some offering nutritional advice, mindfulness and wellbeing content as well as virtual classes. In the main offering this access free to anyone, and others only to their members.

After doing a few digital classes as a way of bringing our team together through lockdown, what started out as intrigue for the Proinsight team ended as **obsession**; obsession with this offering and what this may mean for the future of the industry. Starting with our current clients then moving to other operators, we mystery shopped every digital class possible throughout April 2020.

It became obvious that the quality and delivery of each **digital class varied astronomically,** prompting us to design, what we felt the perfect digital class may look like based on set up, effective use of the chosen platform, delivery & engagement with the consumers.

Working with our friends at Myzone, we set about creating some key metrics for the 'results' element to help us understand how the results that the consumers achieve may impact on how the class is perceived.

THE **HOW**

After creating the content, we started to shop each of **our health & fitness clients**, we then moved onto shop key operators in the industry that haven't held programmes with us in the past. We also looked at some early adopters in the digital space and those that are renowned for providing awesome content.

Our four selected Mystery Shoppers, each with extensive experience in the fitness industry, taking part in classes, were tasked with looking at the digital class through the **eyes of a consumer.** Using a small and experienced cohort of shoppers meant greater consistency, good quality insight and a reduction in bias.

The Mystery Shoppers were briefed to try a digital class using the means of entry/booking that was made available to them by each operator and recording how easy it was to access their chosen operators' class. If this meant a free trial, then that was used, most but not all operators were allowing easy access to their digital content through the lockdown period, this is detailed further down in the report.

The mystery shop included scoring and non-scoring questions along with qualitative commentary; the score for the shop is displayed as a percentage of the number of points actually scored out of a possible number of points to score therefore each operator could be ranked by % scoring.

We asked that the classes completed were either; **HIIT, Boxing, Circuits or Body Weight Training** so that there was a consistency to the genre of classes shopped, that the results were generally comparable, with similar exertion levels (important as will be seen later). Where possible we were also completing 'Live' classes to allow a gauge of the amount of live interaction.

THE **WHO**

To ensure the report covered a representative group of operators, before starting the study we completed a comprehensive review.

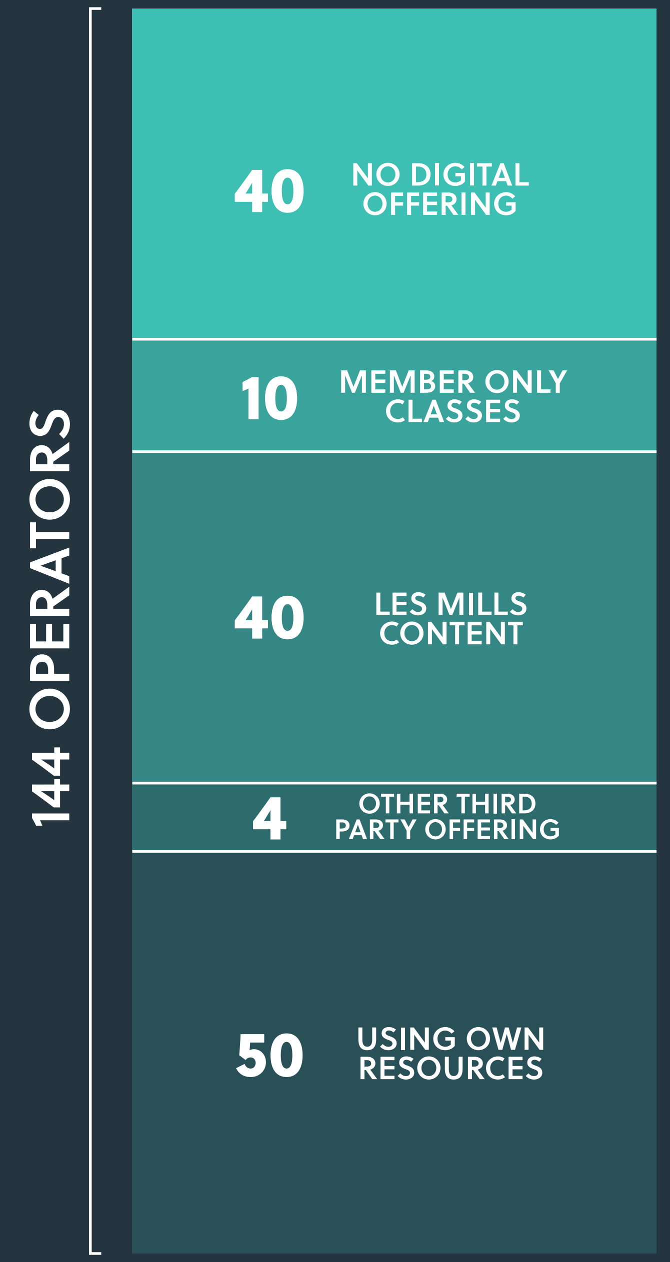
The initial 144 operators on the list was cut by 40 immediately due to lack of any digital offering throughout April. A further 10 were member only classes, which now looks like a commercial mistake, a lost opportunity to reach out to the marketplace; 40 had simply taken Les Mills content and used that as their digital offering; finally 4 were using third party content such as Popsugar, Mywellness, Physical and MOSSA on-demand.

This left 50 operators that were running their own digital classes using their own resource, this is the group chosen to take part in this initial study.

The digital customer journey was split into 5 distinct sections looking at:

- The Class Detail (including being able to find the class online and platform used)
- The Instructor
- The Class Participation
- The Digital Experience
- Exertion Results (in partnership with Myzone)

The full section questions are presented in Appendix 1.



THE **RESULTS**

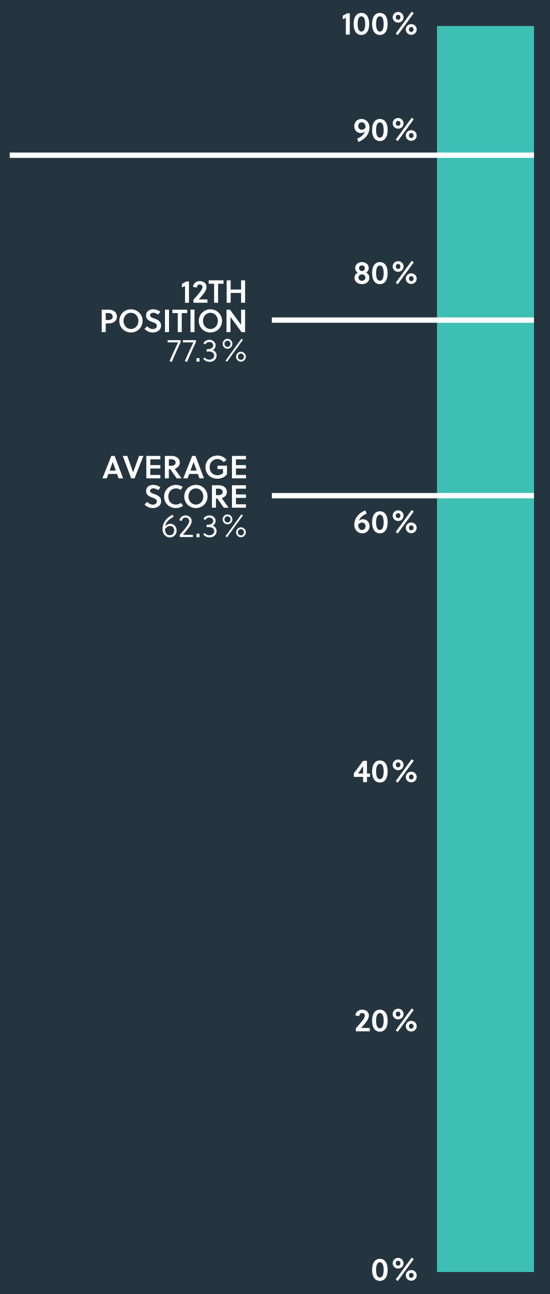
With only **2 operators delivering a service that achieved over 90%,** Boutique Operator BOX12 emerged as the beacon of excellence with David Lloyd being the runner up.

We have split the results into 4 quartiles for ease of analysis. Overall, four of the top ten places were taken by boutique clubs, two leisure trusts along with David Lloyd and Fitness4Less with digital experts Les Mills & Myzone's own classes making up the top 10.

The top quartile is shown in the table to the right, the operators that make up the 50 are shown with their logos on page 13. We'll be sending out a tailored report and confirming league table positions to individual operators shortly after the release of this report.

The average score achieved was 62.3% across the 50 operators with the 12th position being at 77.3%.

POS	Location	Total Score
1	BOX12	93.9%
2	David Lloyd Clubs	91.1%
3	MyZone	87.8%
3	Rowbots	87.8%
5	Fitness4Less	86.4%
6	LesMills	82.5%
7	GlasgowLife	81.8%
8	Third Space	81.6%
9	1Rebel	80.0%
9	Barnsley Premier Leisure	80.0%
11	PureGym	79.5%
12	Active Luton	77.3%



THE CLASS DIGITAL JOURNEY

THE CLASS DETAIL

Snapshot Analysis

Your digital offering must align with your brand promise and offer a seamless user experience. Today's consumer has high expectations; ease of use, a clear online process to follow, no tricks or horrible surprises at the end.

Any barriers in this process will affect the business' ability to attract the digital consumer let alone maintain their custom.

Across the 50 operators reviewed, the average number of weekly classes offered was 15. Operators like David Lloyd offer 35 classes per week for their members. The most popular class length was 30min long, there is a fairly even spread of shops being completed throughout the week, Monday proved the most popular (offering the type of class in the report genre) with Tuesday the least. 38 of the classes completed were 'live' which is impressive and 12 were pre-recorded. The most popular channel was Facebook followed by Instagram with 8 being completed on YouTube; 6 were delivered through the operators own website. Our consumers found HIIT classes most readily available.

SECTIONAL ANALYSIS

Average score for this section was 66.2%.

50 Total classes shopped
- **38** Live Classes
- **12** Pre-recorded

15 Average Classes per week
- **35** David Lloyd
- **92** Snap Fitness

Monday Most popular day
- **Tuesday** Least Popular

Facebook Most popular platform
- **Instagram** 2nd Most
- **YouTube** 3rd Most

HIIT Most readily available

30 minutes Average class duration

The key question that was scored in this section was 'How easy was the class to find online?'

The majority of the operators reviewed scored well taking into account the fact that their digital class strategy was designed 'overnight'. For 28% of the operators, the shopper felt that the digital class was a 'challenge' to find, certainly not what the operator would have been aiming for when trying to encourage people to use their platform during this time. Let's not forget that we started with 144 operators and 40 of these seemingly had no digital offering at all, therefore impossible to find.

Recommendation

When testing current or new offerings bear in mind that your front line staff or head office have inherent biases and inside knowledge that makes it incredibly difficult to replicate a customer's experience, think about using your customers or mystery customers to seek feedback on the customer journey.

Operators need to review the potential benefits of mapping online 'live' classes to the in-club delivery to maintain habit, we found many of the digital classes were being chopped and changed a fair bit with very little consistency from one week to the next making it difficult for consumer to plan their exercise. Many of the shoppers felt that the programme was around staff's availability rather than the need to replicate the original programme.

If the operator is not able to offer a large number of 'live' classes a good library of pre-recorded could be available.

Shopper Comment

"We found many of the digital classes were being chopped and changed a fair bit with very little consistency from one week to the next making it difficult for consumers to plan their exercise."

THE INSTRUCTOR

76%
of classes were 'live'

62%
highlighted Health & Safety

94%
of the classes were engaged

80%
of instructors acknowledged users

SECTIONAL ANALYSIS

Average score for this section was 66.2%.

Quick Analysis

This is the largest section within the mystery shop, it reviews the impact that the instructor has on the digital class, this is of huge importance at a time where the UK has little, to no human communication. It is also worth remembering that 76% of the 50 classes were 'live' and so in some respects this makes the digital class more challenging for the instructor as there is no second chance and if an aspect is missed it is been broadcasted, so no chance to correct a mistake, but does allow the live interaction or communication that the UK craves at the moment. . With a pre-recorded class it offers the instructor the chance to re-record and correct themselves, but this loses the opportunity for true interaction.

It was good to see a high level of instructor introductions along with the class exaplanations, which folows suit to a standard 'in club' class. On the contrary, less than half the instructors wore branded/ company kit or lthing, this is probably due to the fact that many operators were forced to start 'live' classes with little or no warning but does detract from the consumer feeling part of the brand when joining the class. Instructors missed various opportunities to educate the consumer regarding muscle groups being used and only 62% of the time highlighted health & safety considerations, a real worry when most of these people will be exercising at home alone.

It is inevitable given the speed of change that there is still much scope for improvement for instructors representing the operators brand behind the screen. Most instructors did not mention the company's website or encourage the consumer to share their workout on social media channels, but on the upside, our shoppers felt they engaged well. Great to see that 8 out of 10 instructors were giving 'shout outs' to consumers while conducting 'live classes', an easy and effective way of connecting.

The majority of the instructors made a conscious effort to thank the participant for attending but many missed the opportunity to maintain the momentum, ensuring that the shopper returned by offering details of their next class or where to find these.

In short, we witnessed some great instructors that may well be tremendous 1-2-1 or studio instructors but have been thrown into running digital classes. While many of these instructors lacked the tools and support necessary to thrive delivering these classes we would strongly recommend that you congratulate these superstars in your business that stepped up and have helped support your digital stamp in these unprecedented times.

Recommendation

If operators are to develop a hybrid offering that includes digital classes alongside the 'in-house' classes then there is a need to review, learn and look at the specialist skills set required by the new breed of instructors that will be involved in delivering the online classes.

'Lockdown' has made finding professional environments difficult for operators. Going forward operators need to consider some basic guidelines about audio, lighting, branded clothing and clean/ tidy spaces. The branding of these classes represents a huge opportunity.

CLASS PARTICIPATION

25%
of Classes started later than advertised

80%
showed examples of progression & regression

80%
featured a stretch or cooldown

10%
didn't mention a cooldown activity

SECTIONAL ANALYSIS

Average score for this section was 78.3%.

Quick Analysis

This is the shortest and was the highest scoring section of the mystery shop. This section focuses on the more 'technical' aspects of the class delivery. While the shoppers weren't all expert instructors, all have attended a high volume of classes both digital and physical as well as worked in the fitness and health industry, so have an in-depth understanding of some of the technical aspects that consumers would expect to see.

The research identified that 25% of the classes started a little later than advertised and for most of these the instructor cited IT/WIFI issues, which is to be expected based on the limited lead in time that operators had to set these programmes up. Although not a question, a number of classes cut off before the end, where perhaps the class length wasn't configured correctly?

Most classes could be completed in the home and garden, we saw examples where instructors informed the mystery shopper that they just needed space and no equipment and then half way through the class they asked the consumer to use their sofa or a household item to complete an exercise, most consumers weren't prepared for this, so couldn't complete. Upon review, it is important that the instructors fully plan the activity and be certain of the equipment needed to fully prepare the consumer, even if the 'equipment' is a household object.

In the majority of classes, the mystery shopper felt adequately warmed up and in 8 out of 10 classes, examples of progression and regression were shown throughout the class. A stretch at the end of the class was delivered in all but 10 of the classes, and of the 10 that didn't, 50% were asked to stretch on their own after the class, the remaining 5 classes did not mention stretching after. As a consumer may be exercising in their home alone, this could give opportunity for injury.

THE DIGITAL EXPERIENCE

90%
of classes were in clean and tidy spaces

7 out of 10
customers felt the class represented the brand

40%
didn't communicate about space

Only 16%
of classes gave warning about sound

SECTIONAL ANALYSIS

Average score for this section was 52.9%.

Quick Analysis

This was, unsurpringly, one of the lowest scoring sections of the mystery shops because of the quick pivot we mention. We've been able to benchmark and understand the opportunity for training and development as our industry undoubtedly adapts. Many instructors pre lockdown would have never run online classes and would have only only been used to deliver 121 or face to face group sessions. The future landscape has firmly changed and although there is a need for upskilling instructors, it's great to see so many digital stars in our sector, even if we didn't know they were there!

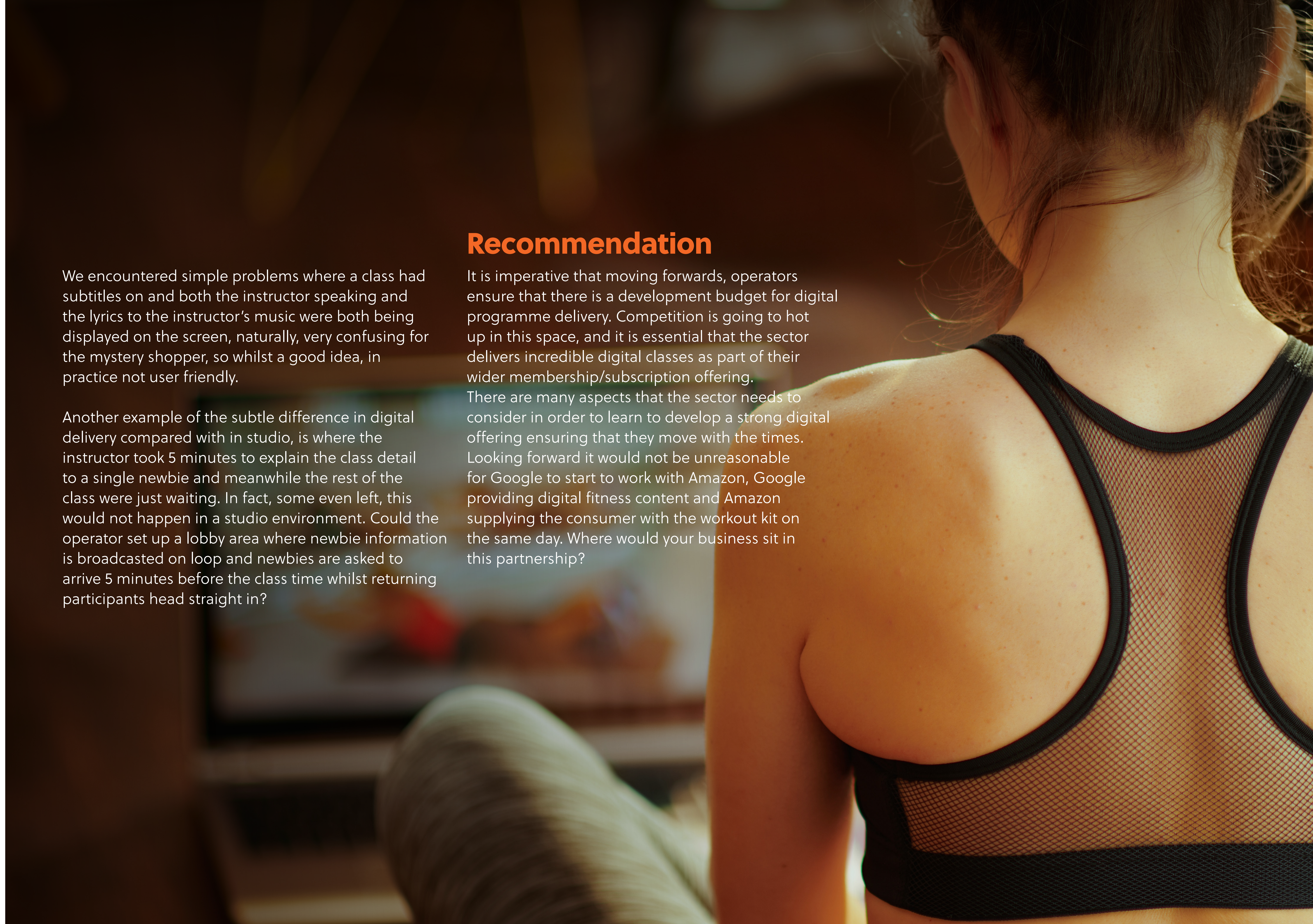
This is the section where there was the greatest inconsistency between the top performing operators and the lower scoring operators. Clearly, filming pre-recorded class is a huge advantage in getting some of the criteria right, however, the drawback will always be the lower levels of engagement and reduced personalisation.

Pleasingly, 90% of shops were filmed in clean and tidy spaces but lockdown presented many challenges and finding professional environments was one of them. Within this question alone there were huge variations from operators like Nuffield Health that are set in clean, spacious, well branded environments, through to instructors presenting in a garage, dogs strolling into shot with the instructor.

The at home settings sometimes made it challenging to see the instructor due to limited set ups, often only including the instructors own mobile phone or laptop. Whilst consumers will have greater empathy with the operators as they understand the challenging times we are currently in; their tolerance is likely to change as operators move forward with any digital offering.

Only 7 out of 10 of our Mystery Shoppers felt that the online experience represented the company's brand, this is very interesting and presents the easiest fix opportunity going forward. How are you going to ensure that the consumer doesn't just pick 'any' digital offering, but picks yours? Although, there are some other quick wins, a few operators, like Lifestyle Fitness used Facebook 'live' classes and simply added a watermark logo to the top right corner. This is a simple tweak to professionalise the experience, therefore if a participant joined the class after the introduction, they were continually reminded of the community they were part of.

40% of the time instructors did not properly communicate about the space that would be required to complete the class safely and enjoyably. In only 16% of classes were instructions given about preparing sound. These are both key coaching points that instructors need to add to the digital delivery toolbox. Could the pre class guidance explain this, to free up the instructor's time and need to remember?



We encountered simple problems where a class had subtitles on and both the instructor speaking and the lyrics to the instructor's music were both being displayed on the screen, naturally, very confusing for the mystery shopper, so whilst a good idea, in practice not user friendly.

Another example of the subtle difference in digital delivery compared with in studio, is where the instructor took 5 minutes to explain the class detail to a single newbie and meanwhile the rest of the class were just waiting. In fact, some even left, this would not happen in a studio environment. Could the operator set up a lobby area where newbie information is broadcasted on loop and newbies are asked to arrive 5 minutes before the class time whilst returning participants head straight in?

Recommendation

It is imperative that moving forwards, operators ensure that there is a development budget for digital programme delivery. Competition is going to hot up in this space, and it is essential that the sector delivers incredible digital classes as part of their wider membership/subscription offering.
There are many aspects that the sector needs to consider in order to learn to develop a strong digital offering ensuring that they move with the times. Looking forward it would not be unreasonable for Google to start to work with Amazon, Google providing digital fitness content and Amazon supplying the consumer with the workout kit on the same day. Where would your business sit in this partnership?

YOUR RESULTS (MYZONE)

myzone

34%

of operators were MyZone customers

Only 30%

of instructors introduced MyZone

< 25%

referenced zones during the class

Only 1

instructor presented global MEP's Challenge

1 in 4

explained how to upload the workout

SECTIONAL ANALYSIS

Average score for this section was 20%

Quick Analysis

This section reviews the ability for the operator and consumer to track the 'results' aspect of the digital class. The biggest provider of wearable technology in the bricks and mortar health & fitness market is Myzone. Of the 50 operators mystery shopped 17 were Myzone Customers and as such we included some separate questions that seek to establish how well the product has been integrated into digital classes. A Myzone belt was worn throughout each of the 50 classes we took part in to allow us to measure the intensity of each class.

The Myzone specific questions were designed in conjunction with the Myzone UK team. Many of the staff delivering these specific digital classes would have had limited time for training, coaching and measurement on both digital delivery and/or Myzone integration. As would be expected, this section score shows the opportunity for operators to better engage the whole physical and new digital teams in this critical product.

Only 3 in every 10 instructors explained Myzone at the start of the class. Worse still, less than 25% of instructors are using/discussing the zones through the class despite our shoppers wearing their Myzone belts throughout. A missed opportunity to really create that community feel and competition.

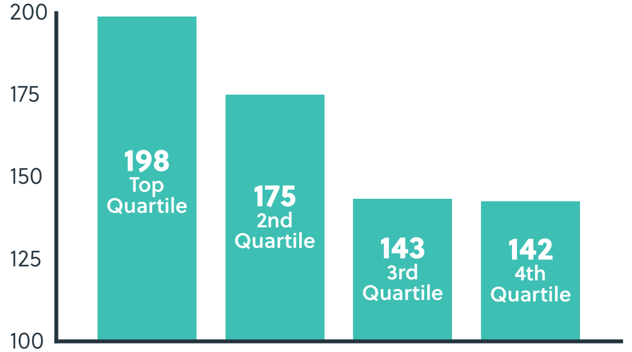
Only one instructor presented the current Myzone Global MEP's Challenge and only 1 in 4 instructors explained how to upload the workout in the Myzone app.

Recommendation

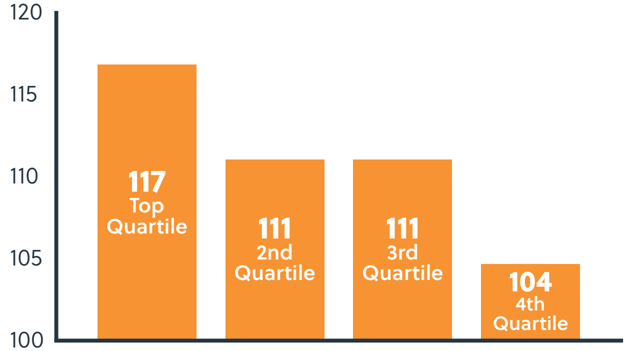
Most operators aren't maximising the power of wearable tech through their digital class programme. In this instance we are only reviewing those operators which have Myzone, but most of the other operators without Myzone or equivalent, have very little wearable presence or focus. This is a massive opportunity for the sector especially as we move into more of the UK working out in other areas than the gym. Referring to page 11 where the correlation between the mystery shopper exertion results and the overall shop score is shown, it is clear that those operators that have achieved high mystery shop scores have also achieved high consumer results during the class (more calories burnt, more Myzone Effort Points and a greater average heart rate increase). We are all aware that results drive retention, so why aren't more operators utilising a wearable technology strategy as part of the digital strategy; those that are needed to develop instructor training and the 'how to use' element for the outputs, both in-class and post-class. Perhaps this digital pivot caused by the pandemic will prompt more operators to review their offering in this space.

YOUR RESULTS (EXERTION)

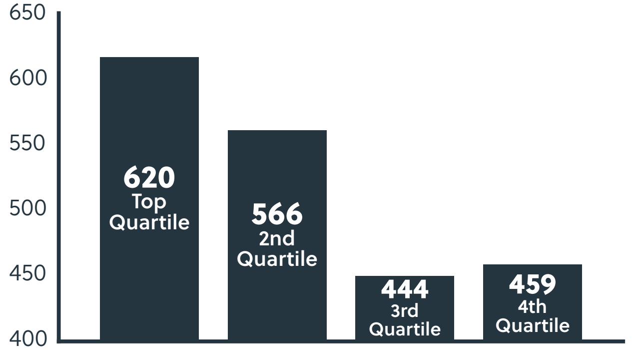
Average MEPs per hour



Average HR Increase (in BPM)



Average Calories per hour



SECTIONAL ANALYSIS

Average score for this section was 20%

Quick Analysis

Each of our Mystery Shoppers for this study wore Myzone belts while participating in the session, giving us some clear metrics for the 'results' aspect of each class. Due to the fact that each class is a different length (15, 20, 30 and 45mins) we've looked at hourly averages. Working closely with Myzone, there were 3 key metrics identified for the participants results:

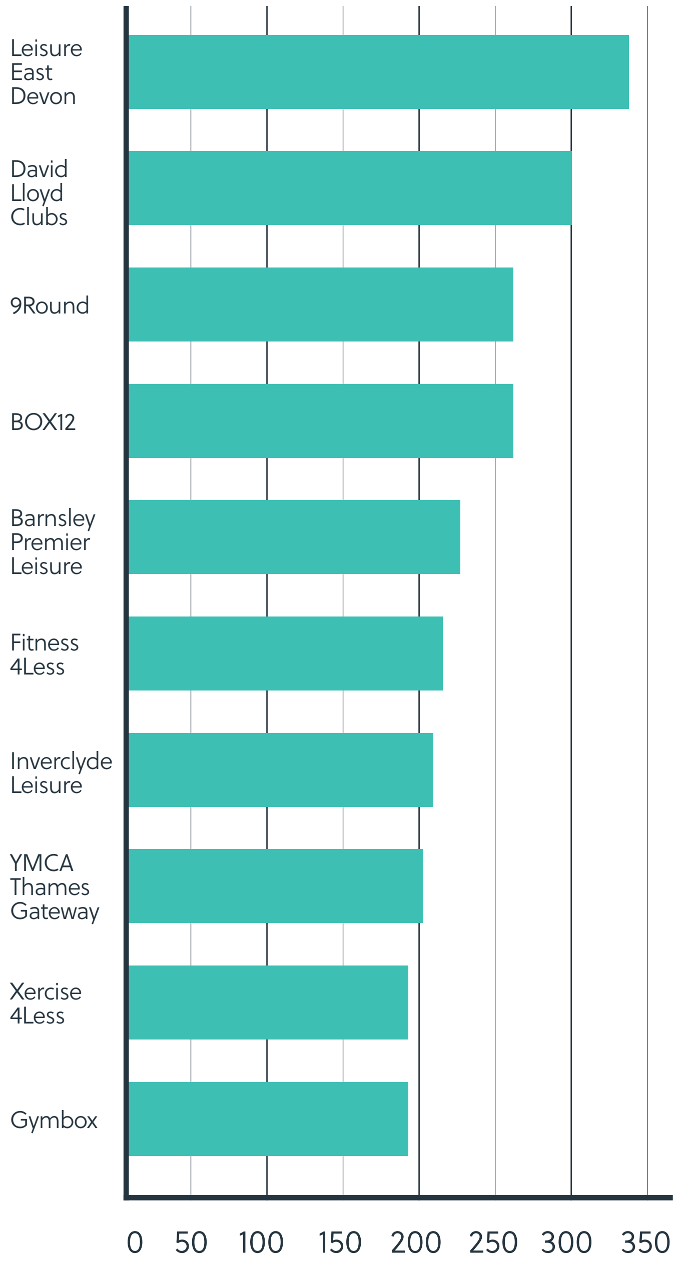
- Average MyZone MEPs (MyZone Effort Points) awarded per hour
- Average heart rate increase (from resting to maximum)
- Average calories burnt per hour

There is a clear and direct correlation between the overall shop score and the results generated from the digital class (MEP's, HR increase & calories burnt). As an example, the digital classes in the top quartile scores on average 198 MEPs per hour, conversely those in the 4th quartile achieved on average 56 less MEPs an hour. The same applies for average HR increase and calories burned; the top quartile performers on average saw an increase of 14 bpm and 161 more calories burned.

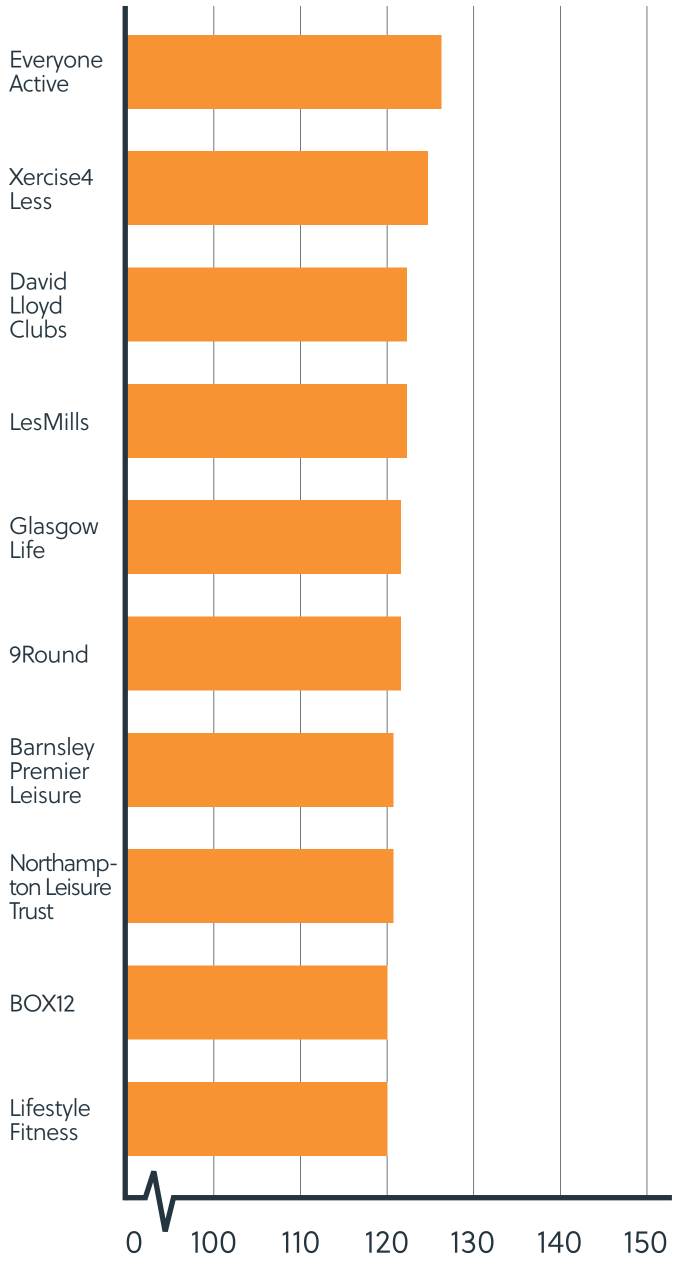
This all points to the fact that the consumer wants results and to understand what those results mean for them. The better run classes are providing the consumer with greater results, which in the long term will ensure that the consumer continues to complete digital classes with that operator.

This is not a scientific study as even the same person can have significant variations in terms of heart rate to similar exercise regimes due to stress, possible reactions and so on. However in an industry that needs to get member results, the use of technology that provides instant feedback on intensity of work and effort might prove to be a competitive advantage.

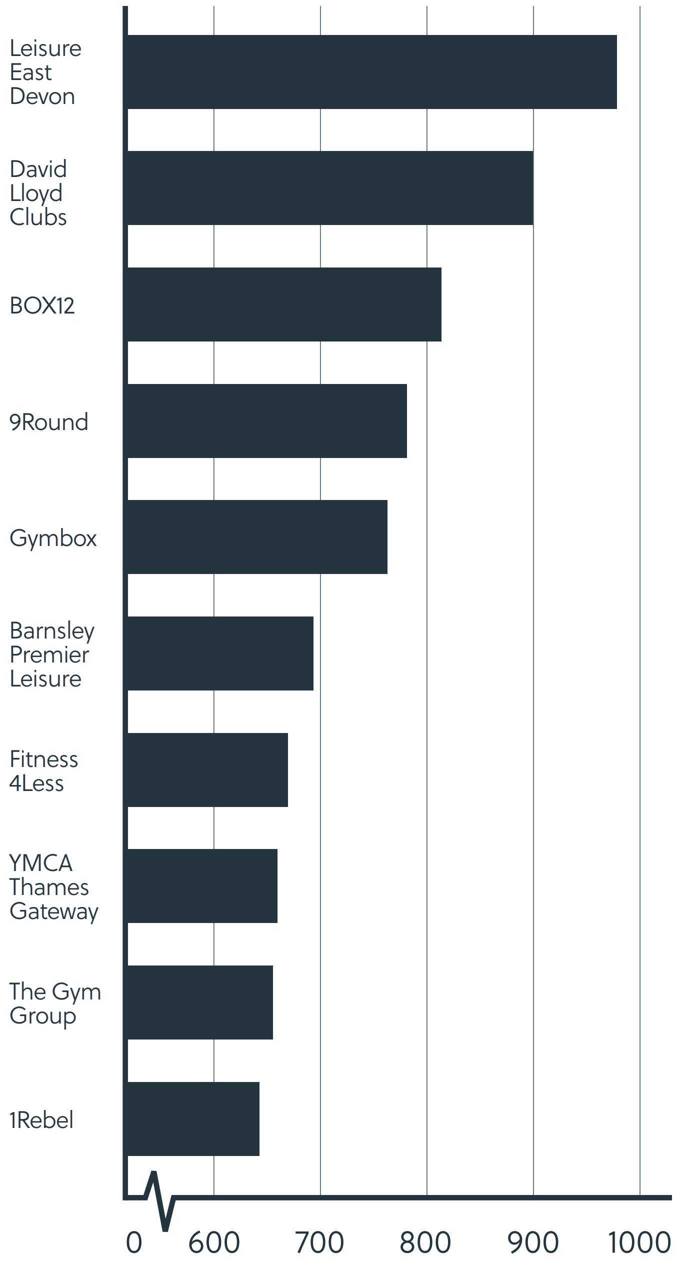
Top MEPs per hour



Top Heartrate Increase



Top Calories per hour



COMMERCIALISATION

The classes we completed as part of this study were either member only classes, where our shopper held a membership, or were free to use.

While it is positive that most operators offered digital classes to members and general consumers for free while their physical spaces were closed due to the impact of COVID-19, the key question is how do the operators monetise this offering? Or, do they just go back to the physical offering? Recent research completed by TA6 powered by Alliance* uncovered that 54% of gym members would use some form of digital offering to complement their frozen gym membership.

With this in mind we asked our Mystery Shoppers to comment on how much they would pay for exclusive use of the specific operators' digital classes per month? The maximum a shopper was prepared to pay was £15 per month, however, it is no surprise the that for the better scoring classes the shopper was prepared to pay more. In fact, the top quartile performers had the shoppers willing to pay on average £4.73 more per month than the 4th quartile.

So, if operators are serious about offering this as a commercial driver then I would suggest that their research is completed into what a strong performing digital offering looks like. The choice for the consumer is so diverse and unlike a physical space where a consumer will only travel a certain amount of time, the Internet means that access and choice is unlimited. It isn't about just adding a digital line of £15 per user per month, it's getting the offering right too.

*TA6 Powered by Alliance – National Fitness Survey of 4,000 members of gyms across the UK 22nd-29th April 2020

OPERATOR INSIGHT

We spoke to Jamie from Box12 after looking at their results to congratulate them and try to establish how they are getting it so right.
Here is what they said:

BOX12 is really proud to have been able to provide at home workouts for its members and the general public. BOX12 'Online' was created immediately after lockdown, our strategy was based around 3 key points - service our members, keep our brand growing and provide for the general public.

At BOX12 you don't just 'use a gym' you have an amazing workout experience and we wanted that to continue through our live workouts. To achieve this, it meant delivering them from BOX12 and giving all participants a digital experience allowing them to visualise the club fitout, lighting and MYZONE etc.

Delivering the workouts from BOX12 during lockdown meant only I could do it, therefore we decided on a limited timetable only 2 classes each week but then created a free online platform for everyone to access in their own time.

We also wanted to deliver the workouts simultaneously over both Instagram and Facebook to help grow our audience on both platforms and allow participants to choose their preferred social channel.

I guess our approach was to stay true to our brand standards even if it meant providing less live workouts but ensuring they were of the highest quality given the challenging circumstances.

We thank Proinsight for creating this very relevant study and at such difficult times. In this evolving landscape the feedback it provides will allow us all to learn and grow thus delivering a better digital experience. As always, their commitment to supporting our industry in delivering the best service to the public continues, long may they continue to keep us operators on our toes!

Jamie Cartwright
Commercial Director
BOX12

APPENDIX 1

Each section was made up of scoring questions and a subjective comment on aspects of the experience from the Mystery Shopper.

The Class Detail

- How many online classes does the operator have?
- Class types
- Class length
- Day of the week
- Ease of locating the class
- Platform the class was presented on
- Live or Pre-recorded (where possible we chose 'live')
- Music playing

The Instructor

- Introduction
- Branded clothing worn
- Class explanation
- Audience engagement
- Advocating the brand
- Health & Safety advice
- Direct the user to the operators website
- Encourage the user to share their workout on social channels
- Discuss intensities that should be used / felt by the user
- Thanked the user for attending and issued details about the next class

The Class Participation

- Class start and finish times
- Exercises relevant for home
- Warm up
- Regression & progression options
- Volume of attendees
- Stretching

The Digital Experience

- Where was the space it was filmed in?
- Clean & tidy
- Branding
- Lighting
- Class preparation (space, sound & visuals)
- Check in with users that the sound/visuals were fine
- Did the online class branding complement the rest of the on and offline branding?
- Technical faults

Results

- Use of Myzone
- Introduction of Myzone
- Myzone – Introduction, challenges, zones, connections, photos & MEP achieved
- Peak / average heart rate
- Calories burnt
- Propensity to join and the perceived value
- Recommendations
- Net Promotor Score

As mentioned above all sections have a verbatim comment, however the report just features selected comments in order to highlight point and also for ease of reading.

INCLUDED IN THIS STUDY ARE

Interesting in Mystery Shopping?

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- RESEARCH

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