

The State of Fitness 2023

INSIDER'S OUTLOOK



ATHLETECHNEWS.COM

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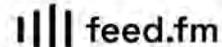
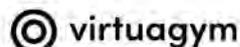


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About Athletech News

Athletech informs and inspires those who are out to disrupt the future of our rapidly evolving industry.

Launched in 2020 at the intersection of fitness, wellness and technology, we cover topics as diverse as brick-and-mortar gyms, connected fitness products, boutique formats, outdoor exercise, equipment innovations, emerging technologies, wellness trends, and consumer insights.

Our writers set out each day to deliver proprietary content and analysis that will help spark ideas and shape agendas for decision-makers in the fast-paced fitness space.

We provide comprehensive and multi-platform coverage of the most impactful news and trends shaping the fitness and wellness segment, bringing together innovators, influencers and executives with content that sparks ideas, uncovers opportunities, and drives growth.

<https://athletechnews.com/>



Letter from the Founder

Dear Reader,

In the words of the poet Bob Dylan, the times they are a-changing. And our industry is no exception.

Fitness is no longer defined by bodybuilding, before and after photos, diet hacks and celebrity workouts on Instagram. Gone are the days of selling 6-pack abs and beach bodies to the masses, promising quick fixes that play into societal insecurities.

Wellness has become part of our everyday lexicon. Our physical and mental well-being are of primary concern, and companies have taken notice of this change in mindset and behavior.

While consumers have taken on a healthier lifestyle in totality, the fitness industry still suffers from an outdated reputation. We don't get the same support from governments, employers, or financial institutions as other industries. We don't get as much media coverage. But all that is starting to change.

Athletech News represents this change. Your passion, your business, your livelihoods are our passions, our headlines, our focus.

We aim to connect the industry, its executives, its thought leaders, and its consumers, and provide the news and information required to move this narrative forward.

The time has come to take our seat at the table and move fitness beyond the gym and into everyday discussions—and the boardroom.

For our second annual State of Fitness Insider's Outlook report, we sat down with industry leaders who are disrupting the market in innovative and exciting ways. Anthony Geiser from Xponential has shaken up the franchise model. Carl Daikeler of Beachbody is rejecting the imperfection economy. Brett Ewer and his peers are taking the conversation to Washington in an effort to get fitness on the government agenda. From their insights, along with those of leading VCs, consultants, and technology providers, a few key themes have emerged.

While challenges remain, the consumer has never been more invested in health. How, where, when and with what we serve them is a moving target, but their appetite to invest time and money in a fitter, healthier lifestyle is without question.

The change in how and where we work has had a profound impact on how and where we work out. As everyone rushes to be an omnichannel provider, being everything to everyone is not necessarily the right approach. While we must meet customers where they want to exercise, not all businesses are built to deliver the same at-home experience as IRL. The community, the comradery—not to mention the machines and equipment—can't always be replicated through an app.

As capital markets tighten, startups that raised funds on the back of COVID-era success stories are now under pressure to scale and operate profitable businesses. Many at-home fitness companies that were positioned as tech and media brands are now facing the typical consumer product challenges of excess inventory, increasing consumer acquisition costs and rising cost of capital. Consolidation is inevitable, but who will emerge as the acquiree and who will be the acquirer is still to be determined.

While Covid shut many businesses down, it was also an artificial growth catalyst for others. Now, as the dust settles and the new normal emerges, 2023 is already proving to be a defining year for many fitness and wellness companies. And Athletech will be there to keep you abreast of the latest news and trends impacting our industry.

We invite you to reach out and share your perspective with us. Help us keep this community of executives in tune with the pulse of the consumer and the technology needed to serve them. Let us be your platform. Use us as your microphone.

Until next time, stay motivated,

Edward Hertzman

SIMPLICITY REFINED



Introducing Aspire Cardio, a streamlined, all-purpose line of equipment that keeps exercisers of all levels coming back.

It benefits from the Life Fitness heritage of advanced biomechanics and is crafted with the reliability that Life Fitness cardio equipment is known for.

Developed with facility operators and exercisers at the forefront, Aspire hits on what's most important to them, such as operational efficiency and an inviting design.

Learn more about [**Aspire Cardio**](#).

Stats and Facts infographics

THE MOST POPULAR WORKOUTS IN 2022

- | | |
|----------------------|----------------|
| 1. Strength Training | 6. Boxing |
| 2. Yoga | 7. Gym Time |
| 3. Pilates | 8. Running |
| 4. Cycling | 9. Dance |
| 5. Barre | 10. Stretching |

Source: ClassPass: (<https://classpass.com/blog/2022-lookback/>)

10 HEALTHIEST CITIES IN THE U.S.

- | | |
|----------------------|--------------------|
| 1. San Francisco, CA | 6. Albuquerque, NM |
| 2. Miami, FL | 7. Los Angeles, CA |
| 3. San Diego, CA | 8. New York, NY |
| 4. Atlanta, GA | 9. Oakland, CA |
| 5. Chicago, IL | 10. Tampa, FL |

Source: MindBody Online: (<https://www.mindbodyonline.com/business/education/blog/top-10-healthiest-cities-america>)

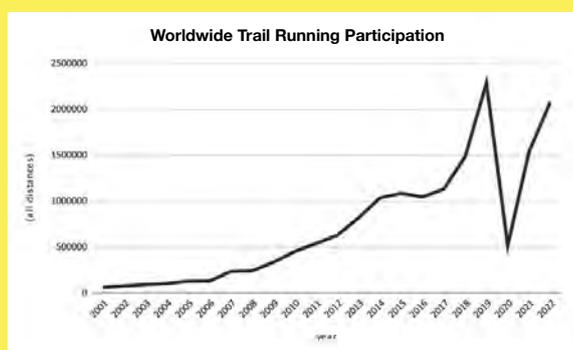
TOP REASON AMERICANS EXERCISE

The reason Americans exercise continues to evolve

2021	2022	2023
I want to control my weight	I want to reduce stress	I want to live a long & healthy life

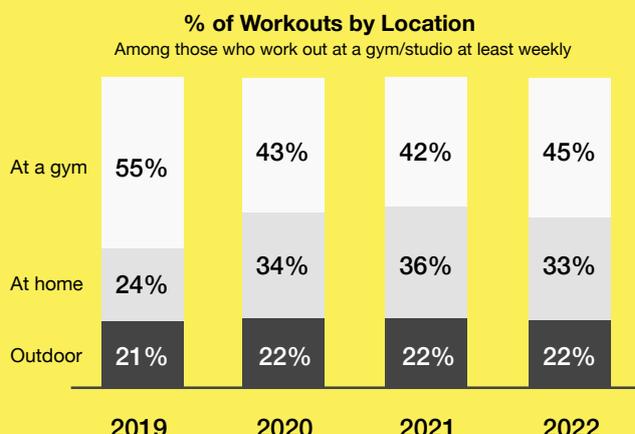
Source: MindBody Online: (<https://www.mindbodyonline.com/business/education/blog/fitness-focused-findings-2023>)

TRAIL RUNNING REBOUND



Source: RunRepeat: (<https://runrepeat.com/the-state-of-trail-running-2022>)

GYM ATTENDANCE RECOVERING

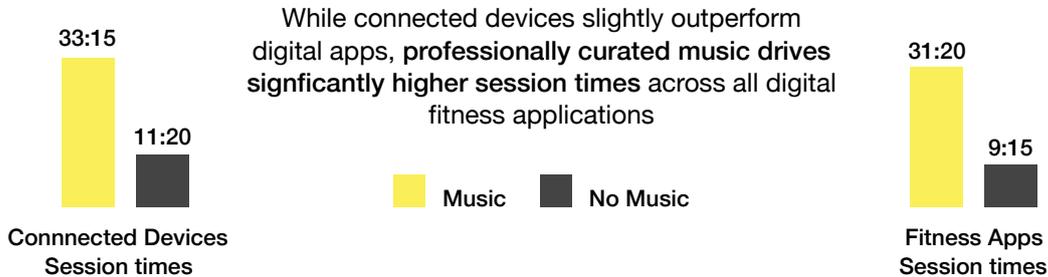


Source: Murphy Research State of Our Healthy Syndicated Study
 Base: Work out at gym/studio weekly or more often - 2019 (n=1,600), 2020 (n=1,782), 2021 (n=1,602), 2022 (n=1,892)

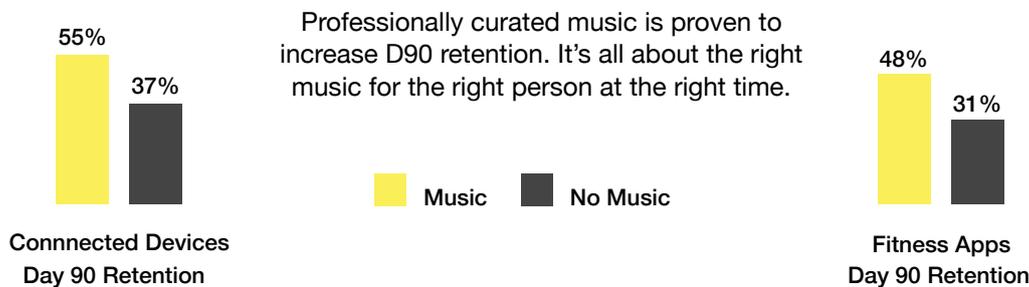
MUSIC'S IMPACT ON DIGITAL FITNESS

(Source: Feed.fm)

Music drives 3x longer sessions times



Music boosts retentions 1.7x



80%

percent of Fitness Market Represented by "GenActive" – Millennials & GenZ

89%

Percent of gym members also now do workouts at home, highlighting the need for digital solutions.

40 billion

number of views attracted by #FitTok, the subject of TikTok populated with workout hacks and fitness tips as of December 2022.

(Source: Les Mills Research)

TOP 10 WORLDWIDE FITNESS TRENDS FOR 2023

(Source: Technology Review)

Rank	Trend
1.	Wearable technology
2.	Strength training with free weights
3.	Body weight training
4.	Fitness programs for older adults
5.	Functional fitness training
6.	Outdoor activities
7.	High-intensity interval training (HIIT)
8.	Exercise for weight loss
9.	Employing certified fitness professionals
10.	Personal training

Source: (https://journals.lww.com/acsm-healthfitness/Fulltext/2023/01000/World-wide_Survey_of_Fitness_Trends_for_2023.6.aspx?context=FeaturedArticles&collectionId=1)

FRANCHISE500 RANKING OF TOP HEALTH-WELLNESS FRANCHISES FOR 2023

(Source: Entrepreneur magazine)

Franchise Name	Franchise 500 Rank	Description	Ownership
Planet Fitness	28	Fitness club	publicly traded - PLNT
F45 Training	29	Fitness club	publicly traded - FXLV
Crunch	39	Fitness center	privately held
Orangetheory Fitness	85	Heart-rate-based group interval workout classes	privately held
Anytime Fitness	91	Fitness centers	privately held – Self Esteem Brands LLC
The Exercise Coach	137	Personal training	privately held
Pure Barre	181	Barre fitness classes & apparel	publicly traded - XPOF
Club Pilates	211	Reformer Pilates classes	publicly traded - XPOF
Burn Boot Camp	247	Gyms	privately held
Gold's Gym	276	Health & fitness centers	RSG Group GmbH

Source: Entrepreneur magazine: (<https://www.entrepreneur.com/franchises/directory/health-wellness>)

MOST DOWNLOADED FITNESS AND WORKOUT APPS IN THE US IN 2022

iOS App Name

iOS Downloads

Planet Fitness Workouts	3.35M
Workouts by Muscle Booster	1.53M
Fitness Coach & Diet: FitCoach	1.34M
FitOn Workouts & Fitness Plans	949K
Home Workout – No Equipments	862K

Google Play App Name

GP Downloads

Planet Fitness Workouts	2.39M
Home Workout – No Equipment	1.63M
Six Pack in 30 Days	1.45M
FitCoach: Fitness Coach & Diet	1.41M
Muscle Booster Workout Planner	1.34M

Source: Apptweak: (<https://www.apptweak.com/en/aso-blog/most-downloaded-fitness-and-workouts-apps>)

OUTDOOR EXERCISE STILL STRONG



More Are Choosing Outdoor Activities

59% of active adults are choosing to run, hike and train outdoors

Source: Gymdesk: (<https://gymdesk.com/blog/fitness-industry-trends-watch/>)

FASTEST GROWING FITNESS WORKOUTS IN 2022

Fitness trends change over the years and 2022 is no different. Certain fitness classes have exploded this year, including sculpt classes and Acro yoga classes.



Sculpt Classes

Often a subset of Pilates, yoga and strength training – was the fastest growing workout of 2022 with a 471% increase in bookings from January to October.



Acro Yoga

Also saw growth, with reservations increasing 200% in 2022. So, if you're looking to improve your flexibility and try your hand at acrobatics, might be a good time to give it a go.

Fitness In a Post-COVID World

The Importance of Community

By James Capangpangan

Image By Faris Hamza

It's the end of the first quarter, and the rush of new year's resolutions has come and gone. What growth in fitness, if any, will we see for the rest of 2023? And how are people's fitness goals changing?

The fitness industry has been shaken up and forced to evolve during the pandemic. We have seen adaptations that allow us to keep up with our fitness from home and apps that encourage outdoor activity and mental wellness. Overall, it has been refreshing to see new technology in the market.

As the pandemic dust begins to settle down, will we return to our pre-pandemic traditions, or are we keeping all the technological advances we have come to love? Let's explore what is happening now in our industry and what we can expect to make or break a successful fitness/gym business in a post-COVID environment.

Let's Meet Up IRL?

During Covid, 25% of health and fitness facilities closed down due to stay-at-home orders. The fitness industry has since shifted and evolved to compensate for the new demand.

Bringing fitness online and to your home, we have seen many virtual experiences offered, from smart gyms, online video training, and a multitude of apps to track progress or share your workout with others. So, just as other industries have bounced back, gym attendance is making a comeback.

"In our portfolio of over 8,000 clubs, we saw a 13% increase over 2019 numbers" says Aaron Verasammy, VP of Sales in North America for ABC Solutions, about

new memberships in September 2022. So, we can see that people are itching to get back into the gym at an even higher rate than pre-COVID numbers.

People want to reconnect in person with other humans, and gym members recognize that they are missing that interaction. Going to the gym with a friend has many benefits. It makes one more accountable to go more frequently, motivates through friendly competition, and is safer when lifting heavy weights.

Going to the gym with a friend has many benefits. It makes one more accountable to go more frequently, motivates through friendly competition, and is safer when lifting heavy weights.

Companies like Orangetheory are recognizing this trend and doubling down on their locations. They are looking to add over 100 new studios to their sites, with most of them located in the United States. "There's a surge in getting back to some sort of in-real-life fitness," says Orangetheory Fitness CEO Dave Long.

Does this mean the end of online at-home experiences?

The Online Experience

Even though more people are returning to the gym, the demand for at-home solutions is still widespread. As in the other parts of their lives, people want the best of both worlds for their fitness and wellness activities. Now that many companies offer remote/hybrid work,

“45% of workouts are inside the club and 55% outside the club... It's now more important than ever to connect with your member outside the club... and not just connect but to extend the membership experience of your brand outside the 4-walls of the physical plant.”

— Mike Leveque, Group COO and CEO, Myzone

Image By Derek Wolfgang from Pixabay

people like the flexibility of working out in their homes, neighborhoods, and offices. According to career site Zippia, 66% of U.S. employees work remotely, at least part-time. With up to 92% of employees working at least one day per week remotely, the average U.S. worker works 5.8 remote workdays per month.

Many people are looking to stay active while working from home, which is why we are seeing increased popularity of workouts around the 20-30 minute range. The short time range allows them to get that extra activity they want during a work break.

“Time is our scarcest commodity, and our 20-minute to 30-minute workouts are trending really high,” said Andrew Hefferman, VP of Customer Experience for Les Mills, who added that high-intensity workouts fit well in this time range and are highly popular for at-home exercises, but there has also been a surge of growth in other areas.

There has been a cultural shift in what health and fitness mean to people. In the past, we often identified health and fitness culture as looking good, but that isn't the case anymore. Instead, people have switched to prioritizing feeling good over looking good. This new priority has seen a growth spike in mindfulness and mental health.

Wearable tech and other companies offering new products and apps for yoga, guided meditation, stretching, nutrition and mobility improvement-based workouts have seen significant growth in participation. Les Mills, for example, released an active recovery and meditation category on their app and saw over 100,000 workouts in the first month.

“This mindset of doing more and working harder... There's been a shift in approach to fitness, and the consumer is looking for a balanced routine of mind and body.” Said Les Mills's Hefferman.

With these new trends in mind, how can health and fitness businesses find success?

A Hybrid Approach

Similar to what we are seeing in the workforce, with more remote/hybrid opportunities offered by companies, a successful gym should aim to provide online experiences along with the in-house experience. Giving your members an outlet to interact with each other outside the gym is critical, according to Mike Leveque, Group COO and CEO of Myzone.

Leveque said “45% of workouts are inside the club and 55% outside the club... It's now more important than ever to connect with your member outside the club... and not just connect but to extend the membership experience of your brand outside the 4-walls of the physical plant.”

A presence in the digital world through an app can be a surefire way to provide this experience. For example, Strava has seen explosive growth in the usage of its app, especially during the pandemic, because they offer a social element to fitness that people desire. According to Conor O'Loughlin, CEO and Co-founder of Glofox, “Use of technology to engage members” will be the key to success in 2023.

Gyms should aim to become and build a health/fitness community through their brands. People want to feel like they are part of that community and will participate more with your brand.

“If a member is part of a digital community with four or more connections, they'll workout 40% more... if they receive four or more likes on our platform, they'll train 80% more...if they receive four or more comments in a month they'll train 120% more” said Leveque.

If members are returning to the gym, but their average number of workouts at the gym is still relatively low, is it only due to at-home workouts picking up the slack? Not necessarily.

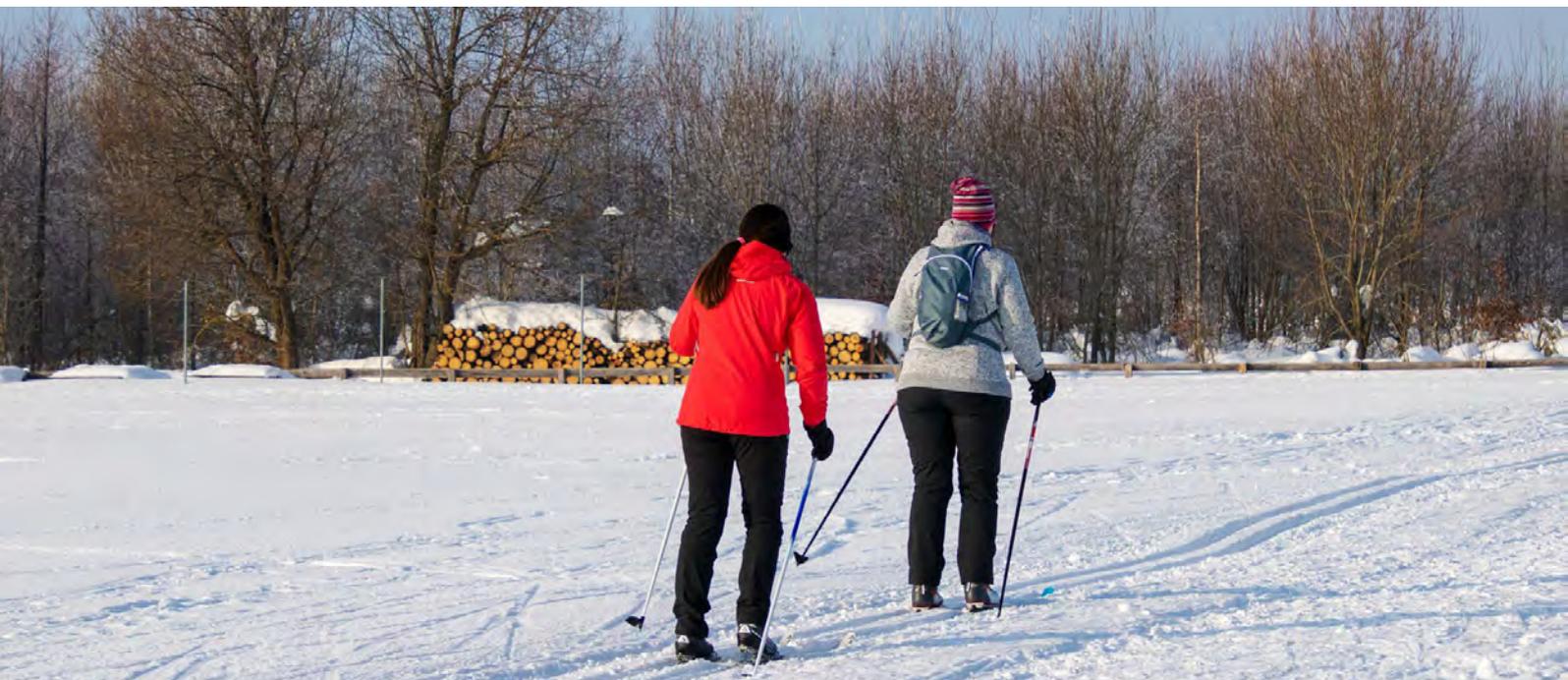


Image By NoName_13 from Pixabay

“52% of athletes uploaded trail activities in 2022. Many are contributing to a surge in trail and ultra running. And while solitude may be a motivator for some, trail activities are 55% more likely to be done in groups.”

— Strava Year in Sport 2022

Outdoor Recreation

When the pandemic began in 2020, about 160 million people participated in at least one outdoor activity (hiking, biking, fishing, camping, etc.). That’s a jump of about 7 million people. Hiking was extremely popular, noted by the growth of hiking shoe brands, which estimated about 4.8 million new hikers in 2020.

In [2022’s State of The Industry Report](#), Athletech News took note of this rise and how it relates to the fitness industry. People want to be fit enough to enjoy outdoor activities and push themselves further. Many people achieve that goal by keeping fit in the gym.

This relationship is still going strong as more people join the outdoor community and stay in it. The [Strava Year in Sport 2022](#) report found that 52% of athletes uploaded trail activities in 2022. Many are contributing to a surge in trail and ultra running. And while solitude may be a motivator for some, trail activities are 55% more likely to be done in groups.

Hiking and trail running are not the only trailblazers in outdoor recreation. For example, Strava reported that alpine skiing was its fastest-growing sport in 2022.

What does this mean for gyms? “Outdoor workouts and at-home workouts are staying stable, but the member is coming back,” said ABC’s Versammy. “They see value in the in-club experience because they can’t get that squat rack...they can’t get that intensity in the community. But, they don’t need that four times a week. They need that one to two times a week to augment what they can do at home.”

Once again, community plays an important role here for the outdoor fitness segment.

The Bottom Line for Success In 2023

People are returning to the gym, but many have different goals in mind than before the pandemic. Some go to the gym to supplement their activities at home. Many go because they missed the camaraderie of the group exercise. Others are going to the gym to supplement their beloved outdoor activities.

People increasingly want to engage online or on social platforms and incorporate technology into their fitness. They want to be able to share workouts, gather data from wearables, and track nutrition through apps.

There’s been a culture shift as fitness focuses more on mental wellness, mobility, emotional wellness, nutrition, and overall feeling good instead of just looking good.

At the center of all these activities is a critical key to success for health and fitness businesses: community.

In 2023, the winning gyms will be able to offer a variety of four-wall and at-home workouts. Of course, the in-gym experience that people want 40% of the time is extremely important. They also need to think about including wellness activities like meditation and yoga, and offer ways for members to share their experience with the gym’s community to promote social interaction.

As Myzone’s Leveque put it, “Set up the club as the health and fitness hub of the community, and if you can do that, you can start to service members no matter where they train.”



Strength Development

LES MILLS

The first of a brand-new series of innovative workouts that meet how your members want to move today.

Progressive Strength Training

A progressive strength training program using weights equipment, aimed at people who want to get stronger. 12 x 45-minute workouts to advance strength training with controlled movements, functional exercises, and dynamic core work.

Grow Member Confidence

Whether new to lifting or a seasoned pro, LES MILLS Strength Development will build muscle, improve technique, and grow member confidence so they can train more powerfully in the studio and on the gym floor.

Suit Member Needs

Clubs can schedule the series as a 12-week or a 12-month block to fit their member's needs.



SCAN TO FIND OUT MORE

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LAUNCH TODAY: lesmills.com/us/strength-development

2023 Fitness CEO Outlook

The Big Transition: Shifting to a New Normal

By Judith Russell, Elizabeth Ostertag and Edward Hertzman

What a wild ride the last three years have been! The pandemic is finally receding into the rear-view mirror, and people are learning how to live with the constant threat of another outbreak of COVID or some other disruptive force. The fitness and wellness industry, which went through hell and back, is finally emerging from the chaos.

We sat down one-on-one with 7 top industry leaders from a cross section of fitness segments to hear their take on the macro trends affecting the industry and to get their predictions on what will happen in the next 12 to 18 months. We also looked at the voluminous research data released over the past few months on financial, fitness, economic, healthcare and technology trends to make sense of where we are and where we're going.

The resulting big picture is one of an industry that, like the consumers it serves, is transitioning back to health, fitness, and a new normal. It is alive and well, growing and turning the corner on profitability. It is working harder than ever to listen to consumers, many of whom are adopting hybrid, omnichannel workout routines, and to "meet them where they are." It is using technology to be more cutting-edge, effective and efficient.

Most of all, it is doing what it set out to do: get more people moving.

How Did We Get Here?

Before looking ahead, let's revisit what got us where we are today.

The fitness industry was growing steadily in the years leading up to the lockdown. Planet Fitness and others had disrupted the membership pricing model, making it more affordable to work out in a gym. The percentage of the population that regularly worked out in gyms or studios increased from 17% of the population, where it had hovered for years, to 20%.

At the same time, growth in the relatively new boutique fitness chain segment accelerated with the likes of Xponential, Orangetheory, F45, and others.

Then, in March 2020, the world suddenly shut down. COVID forced gyms all over the country to temporarily

close, more in some states than in others. An estimated 25% of all fitness facilities closed permanently during the pandemic. Just as suddenly, the at-home market exploded. So many people decided they couldn't live without their workouts that Amazon was cleaned out of dumbbells and yoga blocks by the end of April. Sales of stationary bikes, rowers and resistance equipment went through the roof as the stuck-at-home created makeshift gyms in their bedrooms, basements, and backyards. Online workout subscriptions, running, hiking and walking got big boosts.



Photo courtesy of Xponential Fitness

CrossFit CEO Don Faul was amazed at the adaptability he saw within his brand community during the pandemic: "We had gyms getting flexible by hosting classes in parking lots. We saw members of our community getting together in their neighborhoods, in their garage gyms, really seeking that connection. And then we saw the innovation in the space, leveraging technology to make it easy for people to access CrossFit workouts and methodology at home. A lot of our gym owners made their programming available through digital devices so people could train and work out during the lockdown. And we saw amazing generosity from a lot of our gym owners making equipment available for folks to be able to use at home. But it was certainly a really challenging period."

At-home equipment brands couldn't keep up with the demand. Their rapid growth and supply chain fears caused them to load up on lots of inventory, thinking that once people get used to working out in the comfort

of their home, they'll never want to go back to the gym.

Just as folks started trading their pajamas for fancier workout attire and headed back to gyms and studios, interest rates began to rise, leaving some at-home fitness brands drowning in expensive debt and inventory they needed to work down.

The Fitness Market is Alive and Well

If we didn't know before, we now know that fitness is not a fad. The pandemic led to an awakening about what is essential to people, and physical and mental health came out at the top of the list, probably tied with work-life balance and family. Holistic health, and consumers shifting from wanting to just look good to also wanting to feel good, rose to new importance.

Alberto Perlman, Co-founder and CEO of Zumba, told us: "It is now considered undeniable that exercise is the most important intervention anyone can do to improve their healthspan and lifespan. We learned from the pandemic that this is not only from the physical health perspective, but also from the mental health perspective."

Gyms have reopened all over the country. Fitness real estate added 12MM square feet of new gym and studio space last year, according to commercial real estate leader CBRE, much of it in formerly retail and office space. Newly opened suburban gyms seek to accommodate those with hybrid work schedules.

Gym operators are also taking advantage of the excess supply of commercial real estate space and resulting lower rents to lock in large sites in formerly prohibitively expensive urban locations.

Although it will take a while before in-person gym or studio workouts return to pre-2020 levels, CrossFit's Faul believes the need to be around other people has driven a huge return to the company's gyms in the past six months. "People who have been working out at home by themselves are really energized by getting the chance to spend time and be around people and get all of the benefits associated from being in a class. The benefits you get in terms of the workout and just the human connection are increasingly important in a world in which more people are working from home."

Millennials and GenZers, or what Les Mills US CEO Sean Turner calls "GenActive," are returning to in-person workouts in droves, while some older people remain cautious about the safety of going out in crowds.

New boutique concepts – stretch, recovery, cold immersion, meditation, and nutrition, are all beginning to take off, part of the new trend toward wellness.

As at-home brands like Peloton, Lululemon Mirror, Hydrow and Tonal continue to regroup, their collective cautionary tale echoes loudly in the fitness space, causing even the rapidly recovering companies to focus more on slower, more profitable expansion.

Although it will take time before many of the businesses that suffered during COVID recoup their losses, leaders in the industry are in agreement that the underlying demand for fitness and wellness services is strong and poised for growth, and full of possibilities.

Zumba's Perlman observed "Last year total healthcare spending was \$4.3 trillion, or almost 20% of GDP. Think about that, one out of every five dollars goes to the healthcare system. A lot of it is preventable, a lot of it goes to diabetes, heart disease, things that are preventable with fitness. So as the world of trackers and holding people accountable gets clearer, employers and healthcare systems are going to be more aware and involved than they were before. So those things are really going to become interesting opportunities."

Hybrid Workouts are Here to Stay

Before COVID, there was four-wall fitness. There was also a small at-home market that was evolving into connected fitness.



“ It is now considered undeniable that exercise is the most important intervention anyone can do to improve their healthspan and lifespan. We learned from the pandemic that this is not only from the physical health perspective, but also from the mental health perspective.”

— Alberto Perlman CEO and Co-Founder, Zumba

The shift to hybrid workstyles is leading people to adopt hybrid workouts. CrossFit's Faul sees a revolution underway. "It's not just in-person or at home, it's really both, and so now we need to figure out how do consumers find fitness experiences that provide the continuity, connection, meaningful progress and results, independent of whether they're working out at home or working out in the gym?"

Bill McMenemy, CEO of New York Sports Club, said that because people are working from wherever, fitness is now the "second place:" "Before you had home, work,



“ Before you had home, work, and your gym. I think that fitness is becoming more of that second place because work is really in the space that you happen to occupy, whether it’s at home three days and going to an office for two days or some other arrangement. The traditional workspace has changed, it’s just where you are right now and so the industry has to meet the needs of consumers where they are.”

— Bill McMenemy, CEO, New York Sports Club

and your gym. I think that fitness is becoming more of that second place because work is really in the space that you happen to occupy, whether it’s at home three days and going to an office for two days or some other arrangement. The traditional workspace has changed, it’s just where you are right now and so the industry has to meet the needs of consumers where they are.”

McMenemy commented on the location shift of fitness centers from urban markets where there were large work populations to residential areas to give them an option where they live: “I think the evolution of fitness is really meeting the convenience needs of customers instead of fitness being a destination.”

Perlman said that Zumba is adopting the same kind of location flexibility and extending it to at-home: “Some of our consumers are having two places where they take Zumba classes, one place near their home and another place near the office, so that is a shift toward gyms that have multiple locations. And we are benefiting from that. And we are seeing people who want to engage at home as well, so we are providing a home option, with our instructors teaching virtual classes online, like Zumba’s new Six Week Transformation Program.”

Perlman notes, however, that people aren’t as motivated by the at-home workouts. “People at home won’t work out for more than 25 minutes, whereas at the gym, they’ll do a full hour, which is a testament to the power of community and the power of being in a place full of people kind of pushing each other. In January, bookings for classes increased by 27% over last year, and our virtual classes have decreased, which means that people are wanting to go back to the gym.”

Xponential Fitness Co-founder and CEO Anthony Geisler, whose boutique brands include Club Pilates, Pure Barre, BFT, Rumble, and others, commented that his company’s omni-channel approach is driving



Photo courtesy of NY Sports Club

franchise and partnership strategy: “We’re building gyms in every possible place other than the sky. We haven’t accomplished airplanes yet, but our boutique fitness brands can be accessed in your home, in your hotel room, in the gym at the hotel, on a cruise ship. Really anywhere you want. And that wasn’t the case before. If you look back, you had to get up and go to that location.

“I’m in the brick-and-mortar business, but I believe at-home is a great supplement to what we do as a four wall. It can be taken home, it can be on your laptop or your iPhone. Our digital content comes pre-loaded now on LG televisions, and in the 11,000 active Hyatt and Hilton Hotels. We have a partnership with Lululemon. So, you know, our digital is everywhere. Our physical footprint is everywhere. And we’re doing that because we realize that people are working out everywhere these days. But still the primary location where people work out is inside a brick-and-mortar location.”

CrossFit’s Faul feels that the at-home workout will never fully replace the gym experience, particularly with a concept like CrossFit’s whose methodology is so coaching- and community-dependent. “When we talk about what makes CrossFit really special, it’s the combination of our methodology, the method of training

itself, plus this ethos, which is a combination of the community and the connection and all the benefits associated with that, plus the coach. And the CrossFit coach being a critical, critical part of that. There's a special alchemy that exists when those three things come together, a community dynamic that is really hard to replicate in an at-home experience."

Les Mills's Turner feels that hybrid workouts and online education aren't ever going away. "A lot of people think we're the Body Pump people, but we are actually one of the world's leading creators of content in the fitness space, serving 21,000 clubs and their members; 150,000 the instructors; and 400 million direct to consumer touchpoints, or 7.5 million workouts per week and growing."

On whether the gym or at-home workout is the more rigorous, Turner offered the following: "We did a recent study on motivation, and how people felt between our virtual at-home and in the club with the live instructor. And people enjoyed the in-club class more. It was a 14% higher level of exertion and a 13% higher level of enjoyment. Satisfaction and enjoyment are higher when people are in the club."

Tech-Powered Innovation Won't Slow Down

Connected fitness and wearables coupled with smart phones are enabling customization, personalization, and a 24/7 relationship between provider and consumer, launching us into an era of biometric and behavioral data-enabled personal preventative health and more efficient and effective workouts.



“ We’re building gyms in every possible place other than the sky. We haven’t accomplished airplanes yet, but our boutique fitness brands can be accessed in your home, in your hotel room, in the gym at the hotel, on a cruise ship.”

— Anthony Geisler, Co-founder and CEO, Xponential Fitness

The innovation in fitness technology solutions doesn't seem to be slowing despite the economic headwinds, according to the industry leaders we spoke to.

Chuck Runyon, CEO of Self Esteem Brands, parent company of Anytime Fitness, Basecamp and The Bar Method, exclaimed: "See this smart phone? This is the single most important piece of equipment in the wellness space, because your consumers are looking at that thing hundreds of times a day! They expect a brand or a coach to try to understand their lifestyle and therefore create a program that is right for them. They might only visit your studio or gym a couple of times a week, and so our brands have to find a way to offer content that is compelling to the consumers we serve, that keeps them engaged in our brand."

He feels that Anytime Fitness can become Anyone Anytime Anywhere Fitness, providing a "gym in your pocket, a coach in your pocket when you're not inside the gym or club sending you those nudges for better behaviors and then showing you your biometrics and outcomes."



“ A lot of people think we’re the BODY PUMP people, but we are actually one of the world’s leading creators of content in the fitness space, serving 21,000 clubs and their members.”

— Sean Turner, CEO, Les Mills US

This allows the provider to use technology for good, not to replace people. But, Runyon cautions, it's important to make sure to have the right message at the right time to the right consumer. "The more data we bring in helps us dial that, and even more so it can be a very personalized experience for them, inside or outside of our bricks and mortar."

Zumba's Perlman believes that tracking technologies will continue to get better and more integrated, allowing

visibility between “everything that you do and possibly integrated into what your personal trainer sees, what your healthcare provider sees. And not just single silos, but really part of everything.”

Les Mills’s Turner said his company is looking into VR-enabled solutions: “We see real opportunity in taking people from gaming into mainstream fitness. Through partnerships, it would make sense for us to have, let’s say, a storefront in the metaverse and through that you could access programming, and different gamification that crosses over with In Real Life.”

Although the investment landscape is increasingly competitive, with a steep drop in venture capital investment in the past year, the demand for good technology solutions will cause the cream to rise to the top. It’s important to keep in mind that fitness equipment, devices, and wearables, though tech enabled, are actually consumer products, and these



Photo courtesy of Xponential Fitness

brands carry very different valuations than technology companies. Many emerging fitness brands that raised seed money based on technology valuations are now seeking to be acquired by gym operators and franchisors. However, the profit model is very different.

Self Esteem’s Runyon warned that many tech innovations will have difficulty scaling, resulting in a shakeout. “There will continue to be some losers in the space of direct-to-consumer in both physical and digital products. In our industry, equipment providers will have a rough time as well. You might see some consolidations or bankruptcies in that area. We are always active in the market. I’m getting more inbound inquiries from emerging brands wanting us to acquire them. We turn down far more than we ever really take a hard look at. But outside investment capital is drying up. People want to see profitability. Many companies have, I think, gotten a bit over their skis in terms of their cash burn, which creates opportunities for companies sitting with cash.”

Keeping your Brand Relevant Requires Listening to Customers

It’s a great time to be a fitness consumer. Called the “Roaring Twenties” by one CEO, this decade will be remembered as a time when consumers have an abundance of choice for workout modalities and pricing options.

Self Esteem’s Chuck Runyon commented, “There has never been a better time to be a fitness consumer, and it’s only getting better. It doesn’t matter what you’re looking for, there are all types of variety at any price range. At any level of convenience, there’s a product. You can go on YouTube for some amazing free content. You can find a health club or studio that is affordable. Digital and at-home solutions continue to get more affordable. So, there are really no more excuses from a consumer perspective. They can find anything they want.”



“ See this smart phone? This is the single most important piece of equipment in the wellness space, because your consumers are looking at that thing hundreds of times a day! They expect a brand or a coach to try to understand their lifestyle and therefore create a program that is right for them.”

— Chuck Runyon, CEO, Self Esteem Brands



Photo courtesy of Xponential Fitness

But what exactly do they want? And what does a fitness brand need to do to stay relevant and important to consumers?

At the end of the day, according to all the industry leaders we spoke to, consumers want results, accessibility, and a great experience that involves not only the quality of the instructor and the workout, but also the facility, the community and the music.

They were also on the same page that brands that try to be all things to all people won't be winners. It's becoming harder and more expensive to launch new concepts, so stick to your core competency. Know your consumers. Figure out what they really look to you for and give it to them at the right time. Don't invest in toys or gimmicks that your customers aren't ready for. Too-early adopters of tech solutions run the risk of overpaying for something that only a small portion of its customer base will actually use.

Les Mills's Turner explains his brand's longevity quite simply: "The reason we've been in business for 50 years is we're always innovating, we never rest on our laurels. We always looking at new trends, not only because of business, but because we love fitness. And we really want to redefine the space. So we're interested and we're pumped to always be doing new stuff. That being said, we're really focused at being the best. We believe we're the best app and that we're creating the best content and education out there. That focus, along with embracing the new trends and really knowing the end consumer, and shifting and applying our process to that, help us keep going forward and adjusting, being adaptive."

Speaking about how to serve the younger workout customer, New York Sports Club's McMenamy admits the offering "has to be purposeful, well thought out and aligned with the customer's fitness goals. We now see an equal split of 50/50 males and females participating in barbell training, functional training, high performance, semi-private, and group fitness. So that segment is growing, and it's gotten very, very popular and I would say that it's more than a fad, it really is young people investing in their health. So, we are aggressively rolling out and changing how our gyms are set up. We utilize data to understand who our consumer is relative to where our gyms are."

Self Esteem's Chuck Runyon observes "There are consumer segments that want lower impact or that really prefer at-home. There are those who want strength training. So I think it comes down to knowing the consumer segments you're appealing to, and then, providing them the services they expect and need. I would be careful to not try to be all things to all consumers. You've got to know the market you're going after, and then make sure you offer a very compelling value proposition within those segments."

BODi CEO Carl Daikeler thinks it's important not only to listen to consumers, but to also, as he calls it, give them grace. The company formerly called Beachbody is pivoting to a new business model that he feels will attract more people to exercise: "I'm in the business, first and foremost, of helping people lead healthy,

fulfilling lives by feeling good about themselves. I'm not trying to help people go from five to six or from 10 to 12. I'm trying to help 150 million people go from zero to one. We made a decision last year to pursue a category that we call health esteem, that combines immediate appreciation of who you are with a complete lack of a requirement to do anything in order to appreciate yourself and be worthwhile in the world. Now, once you appreciate yourself, and you've got strong self-esteem, you can choose a workout or nutrition program as a way of serving yourself. Not of fixing yourself or judging yourself."

Zumba's Perlman feels that Zumba shares some characteristics with yoga that have helped it stand the test of time. "Yoga connects you not only to a physical benefit, but also to an emotion. The emotion of yoga is Zen. Zumba is connected to an emotion we call freeing, electrifying joy, that moment when you just lose yourself in the music. There is also the communal aspect. The yogis, people in India that are super deep into it and creating new things, want to discover more. And Zumba is the same way. Go to the Zumba convention, and you see them go crazy, super deep into rhythms, belly dancing and then meringue and salsa, and there's always more Zumba to learn even better."

Perlman says that music is such a key element that his company launched the Zumba Music Lab when songs released in the Reggaeton genre, one of its core

“ I’m in the business, first and foremost, of helping people lead healthy, fulfilling lives by feeling good about themselves. I’m not trying to help people go from five to six or from 10 to 12. I’m trying to help 150 million people go from zero to one. ”

— Carl Daikeler, CEO, BODi



rhythms, were becoming too slow for Zumba classes. “We got some of the producers who were producing for artists like J. Balvin, Dua Lipa and BTS to produce very high-end, powerful music for Zumba. Our instructors love the fact that they have exclusive music that no one else has.”

Perlman added that some of the proprietary songs ended up ranking higher with Zumba instructors than some of the famous music it provides. Zumba also provides its instructors with tech tools like a playlist app that allows them to learn the moves and routines and then, like DJs, to create playlists for their classes and crossfade them together, speeding up or slowing down songs as necessary.



Photo courtesy of Zumba

Perlman predicts that in the future, music and music solutions will play a bigger role in fitness. “This an area we are really diving into when it comes to the music we create for our respective brands. For example: in CIRCL Mobility, we use binaural beats to enhance recovery and calming effects. In Strong Nation, we use PerfectSync™ which means we score the routine like a fight sequence in a movie, so every move is perfectly synced to the beat and the need for counting is eliminated, both of which drive our students to push themselves harder.”

Xponential’s Geisler feels one requirement for success is to ensure consistency of brand identity and narrative across channels and marketing platforms: “We bought our own production studio in the summer of 2019 to start making sure that Xponential’s fitness and digital footprint looked great and consistent across all our brands.”

New York Sports Club’s McMenamy feels having the right equipment is crucial today: “Consumers today are very thoughtful and well educated on their fitness journey. They have a ton of information in the palm of their hand, in their phone, so they know specifically what they’re looking for. It’s not enough anymore to just offer group fitness treadmills and pin load equipment. The days of build it and they will come are over. You have to have the right equipment and amenities for the consumer because they have very specific outcomes.”

Don Faul plans to stick to the core values that bring consumers to CrossFit: “This period has been really

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— Alberto Perlman

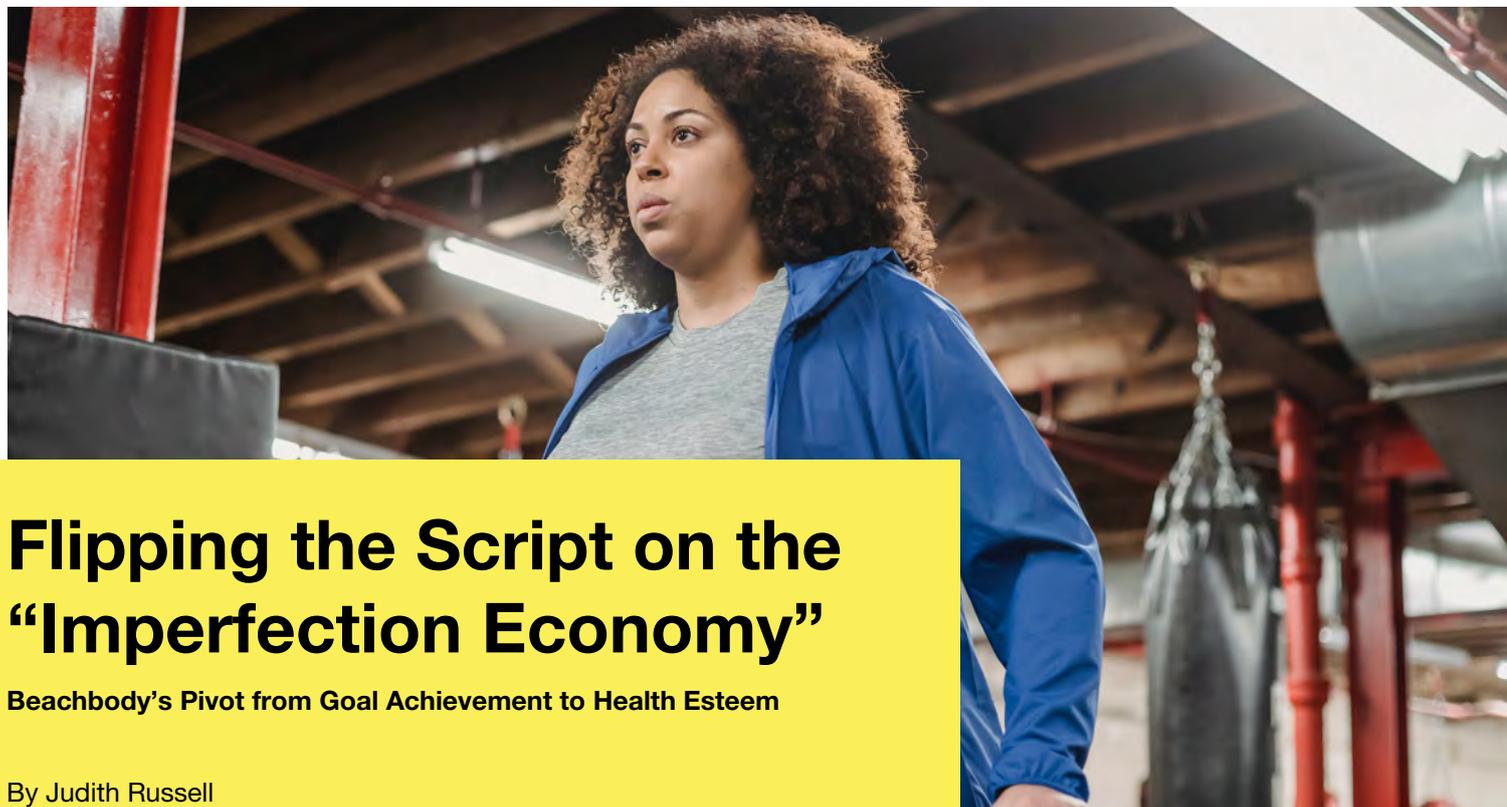
important for us to remain clear on the essence of our value and what our members really, really love from us and not to get distracted from the core essence of what makes CrossFit really special. I think it’s really easy to chase a bunch of expensive trends that can at best be a distraction and at worst dilute what you offer. CrossFit has been around for 20 years, which is a long time in the fitness industry, because the core methodology, what CrossFit is, works.

“It’s ultimately, can you create something that changes someone’s life in a way that’s meaningful and sustainable that they stick with? That’s really what we focus all of our energy around.”



“ This period has been really important for us to stay clear on the essence of our value and what our members really, really love from us and not to get distracted from the core essence of what makes CrossFit really special.”

— Don Faul, CEO, CrossFit



Flipping the Script on the “Imperfection Economy”

Beachbody’s Pivot from Goal Achievement to Health Esteem

By Judith Russell

Athletech News sat down with the spirited and candid founder and CEO of Beachbody to hear his perspective on where the industry is headed and why his company is making dramatic changes in its business model. What he told us, though at first surprising, speaks volumes about some of the challenges facing fitness players seeking to make more people fit and healthy.

“Beachbody is dead,” said Carl Daikeler, Co-founder, Chairman and CEO of BODi, formerly Beachbody.

He went on to explain. “We’ve had a mission statement for 24 years, which is to help people achieve their goals and lead healthy, fulfilling lives. And the programs that we’ve created, famous ones like P90x Power 90, Slim and Six Turbo Jam, Hip Hop Abs—I could list 100 of them—were the first of their kind to give people basically a legit fitness narrative that you might get from a trainer, but right in your own home, and on a finite timeline. We had 100 workouts that help you achieve your goals in 7 days, 21 days, 60 days, 90 days. It was awesome. And it helped people achieve their goals.”

Then, suddenly, the company made the decision to change its name, and announced last October the platform would now be called BODi, a moniker it had been considering for its premium subscription.

When asked why such a drastic move, Daikeler’s response was immediate and candid. “Because, not only is Beachbody dead, but the fitness and diet industry is largely dead. The industry continues to execute an old playbook that needs to convince people of their imperfection in order to engage them. Play one is you’re not good enough, you need to lose weight,

so join my gym. And play two is, you are never good enough. There’s always something more to achieve. That’s called permanent dissatisfaction.”

Daikeler’s *aha* moment came when he realized that this is the example he’s setting for his kids, ages 14 and 23. “When we come up with programs, I think about what I want them to see as the legacy of this business that we’ve built. So I knew we had to flip that script.”

Unlike many fitness executives, Carl didn’t come into this business through his athletic background, workout discipline, or secret formula for helping get others in shape. If anything, it was the absence of these characteristics that attracted him to the space. “I’m not a fitness person, I don’t like working out. I don’t like eating well. I was a quasi-athlete in school, but I wasn’t disciplined. I have no problem not exercising, I didn’t love it enough to sacrifice sleep for it unless I had some vacation or something coming up. But what would be psychologically very motivational for me was if I had a timeline. Going from day one to day 90, for instance.”

This became the genesis of the business, and the part of the Beachbody mission that, Carl said, the company “ran the hell out of for 24 years.” The company has grown from its flagship P90x product to a collection

of almost 100 digital exercise programs, a nutrition business that comprises more than half of company sales whose core product is called Shakeology, connected fitness programs that include a connected bike, and other products and services. The company went public in 2021 through a SPAC, or special purpose acquisition company, and is now traded on the New York Stock Exchange. Last year the company had 2.5 million subscribers and sales of almost \$700 million.

In the latter part of the last decade, two trends started to eat away at the Beachbody business model. The first was the digital revolution in media. Beachbody's original strategy was to sign up a customer and ship him or her a box of DVDs with a note wishing good luck with the 60- or 90-day program. By 2016, the company could no longer put off the shift to digital, which also shifted the customer relationship to a more continuous dialogue.

The second trend that made Daikeler question what Beachbody was doing was body positivity: "I started to see some problems materialize, not just in our business model, but in the surroundings, people not responding with enthusiasm to what they used to, which were the 'before' and 'after' photos." Although Daikeler claims that intrinsically there were health benefits behind those photos, those were overpowered by the negative reactions, and eventually the connotation of the name Beachbody began to undermine the company's ability to deliver on its mission. Daikeler recounted searching Google for Beachbody, and instead of seeing his company listing, he would see Kim Kardashian "flaunting her beach body in Malibu," indicating that the term was starting to take on a newer, narrower definition, not the one originally intended by the brand. "It started to limit and, in fact, suppress our ability to achieve our mission statement."

For the last six years, the company has been struggling to evolve from a company that was great at the first part of its mission, that of helping people achieve their goals in a fixed period of time, to one that also delivers on helping people lead healthy, fulfilling lives, which it feels it has failed on.

The company's recent financial performance indicates it might not be a bad time for a strategy shift. In the twelve months ending December 31, 2022, total revenue dropped 21% compared to the same period in 2021 and 8% below its pre-COVID baseline.

The missing element, according to Daikeler, is to help people feel better about themselves and to stop participating in the permanent dissatisfaction business. "We made a decision last year that we were going to

pursue a completely different category, one that we call health esteem, that combines immediate appreciation of who you are with a complete lack of a requirement to do anything in order to improve how you feel about yourself and be worthwhile in the world."

Beachbody added an entire new layer to its platform of positive mindset to help people love themselves. From moment one, before the first workout, it helps you, among other things, figure out how to eat more dessert, how to enjoy all the food groups that you want, and how to embark on a fitness program that lets you "have a real life."

On March 2, Beachbody added an entire new layer to its platform of positive mindset to help people love themselves. From moment one, before the first workout, it helps you, among other things, figure out how to eat more dessert, how to enjoy all the food groups that you want, and how to embark on a fitness program that lets you "have a real life."

The health esteem routine will include masterclasses from authors and positive psychology experts to help people feel better about themselves and the world in general. The idea, says Daikeler, is that once you've repaired your self-esteem and appreciate yourself, you can choose the right workout or nutrition program that serves you and helps you, not fixes you in a judgemental way.

"We're not telling you that you need to lose 50 pounds. We're saying we can get you strong enough, get your metabolism going, with maybe 15 workouts a month, which we call a body block. Do five workouts a week for three weeks, take the fourth week off or go walking or whatever. But give yourself the freedom to live life, have a vacation without thinking 'I gotta stay on my program.'"

Daikeler recalls going into a gym that had painted across the wall the slogan "Proud, but never satisfied." "Can you imagine? I thought, I need to get out of the industry as quick as possible if that is the mentality that we are promoting, never satisfied, never pleased with myself, which is why you have suicide, overeating, escapism, people who are overdoing plastic surgery, overtraining, and body dysmorphia. I refuse to participate in it anymore."

“ The industry continues to execute an old playbook that needs to convince people of their imperfection in order to engage them. Play one is you're not good enough, you need to lose weight, so join my gym. And play two is, you are never good enough. There's always something more to achieve. That's called permanent dissatisfaction.”

— Carl Daikeler, Co-founder, Chairman and CEO, BODi

He may have a point. Forbes publishes a list of the top New Year's health resolutions each year. In 2023 the number one New Year's resolution wasn't lose weight, improve my fitness, or improve my nutrition. It was improve my mental health.

Daikeler feels there is a lot of virtue signaling going on. "The tech companies are all claiming that they're not in the imperfection economy. But if you wear a monitoring device, and it tells you if you're imperfect today and didn't close your rings before midnight, that's stress-inducing.

"There are gyms that say they don't allow judgment, but if you bang the weights, or grunt, they sound an alarm. What is that? If I make too much noise working out, the whole room is gonna judge me now?

"It's not enough to just change the name, you need to really change the direction of the company. And, can they take the weight watching out of the company by just taking it down to the acronym of WW? It's still weight watching, right? How about self-esteem watching? What about feel-good watching? What about what-do-you-need-as-a-human-being watching??"

When asked how BODi will break through all the industry noise and walk the walk, not just talk the name-change talk, he quipped: "It's easy. I'm no longer in that business. You probably don't even want me in your publication.

"Do you feel good?" is not a binary question, not black and white, it's a continuum. And that's what's wrong with the industry we call the imperfection economy. It's

torturing its customers, telling them they're not good enough. Then never telling them they are good enough. That is a recipe for a psychological impossible-to-escape cycle."

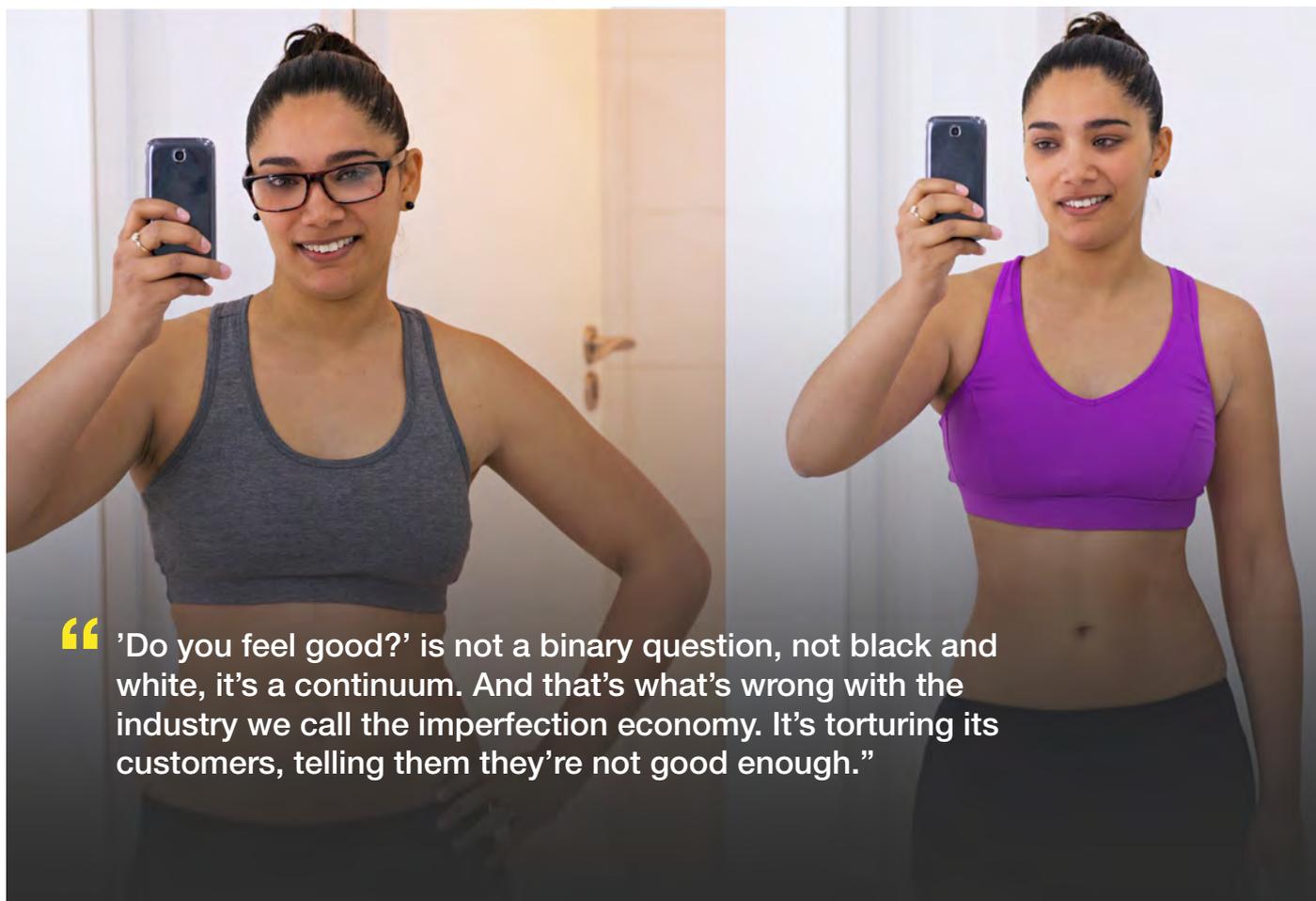
In 2023 the number one New Year's resolution wasn't lose weight, improve my fitness, or improve my nutrition. It was improve my mental health.

Daikeler makes it clear that there's nothing wrong with looking great, and if it's a byproduct of feeling great, then even better. And the only way to serve the almost 150 million people in North America who are overweight or obese is to get out of the abs business and into the feelings business.

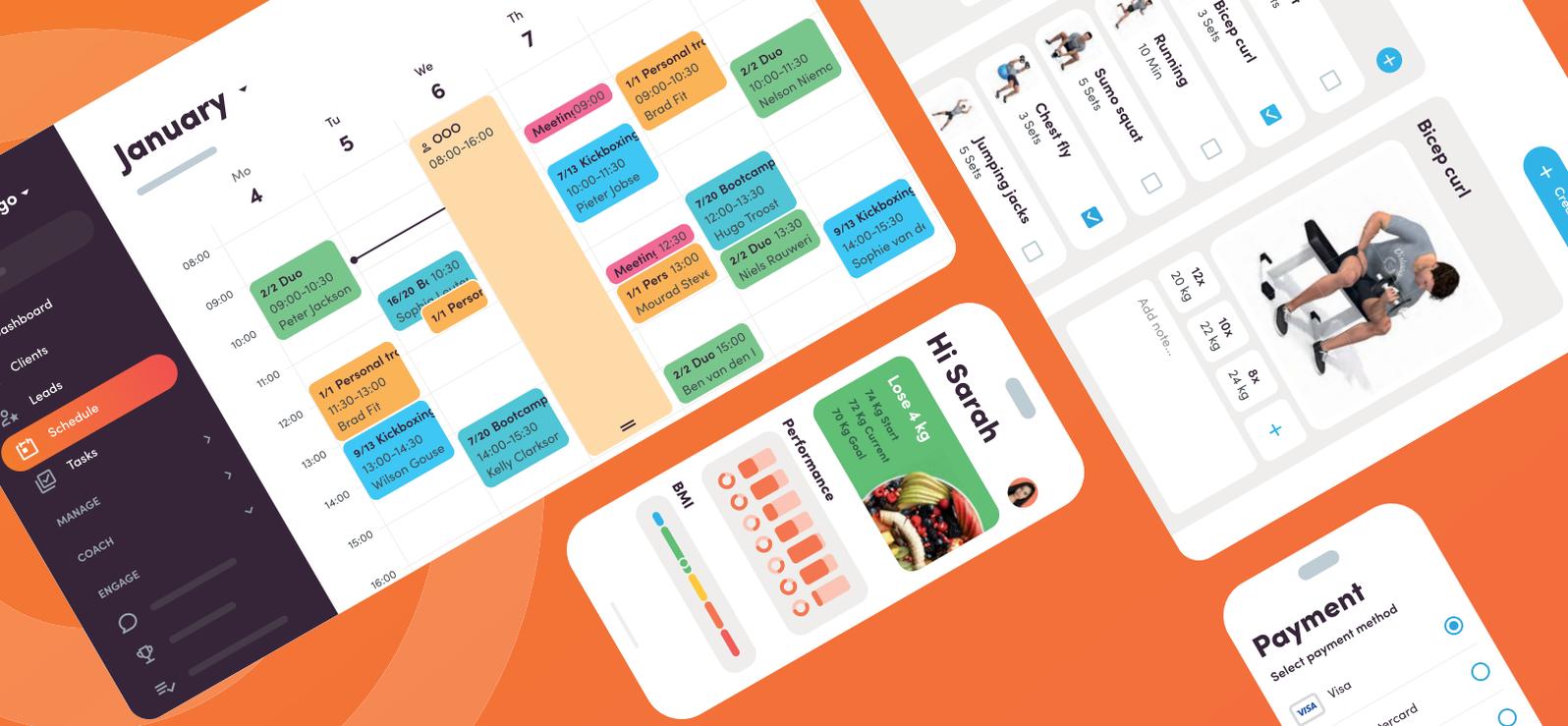
"Let us be this sunshine in your life, the thing that feels great, not this nagging voice that's feeding into the judgment, the criticism, and the competition. Instead, this voice will say hey, back off, you need to take a day off to get your head straight. Because you're in here for the wrong reason, man. Like, come back in when you're doing this because it feels so good to push that hard.

"And then when it's 5 a.m. and you're lying in bed, you're thinking, I gotta get down there because I love the way I feel about this. I love the way I feel about myself. I love that I love myself enough to do this.

"I f#@-ing rock."



“ 'Do you feel good?' is not a binary question, not black and white, it's a continuum. And that's what's wrong with the industry we call the imperfection economy. It's torturing its customers, telling them they're not good enough.”



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Sound Check: What Workout Music Tells Us About Fitness Trends

By Judith Russell

For most people, the idea of doing an hour of exercise without music is unthinkable. Music can be a welcome distraction from pain and fatigue, a mood enhancer, and an endurance booster.

According to data from Feed.fm, a leading music solutions provider to the digital fitness industry, the music that accompanies our exercise routines can also be a barometer of where fitness and wellness trends are headed.

The Feed.fm platform, which integrates licensed music directly into the apps and connected devices of more than 75 top fitness and wellness brands including Nautilus, Class Pass, BODi Interactive (formerly Beachbody), and Tonal, streamed over 730 million tracks to digital fitness app users in 2022, a 33% increase over 2021.

Serving a large audience through a wide variety of apps uniquely positions Feed.fm's music curation team to be able to aggregate the data and quickly identify trends to deliver effective music stations to their partners. Workout music is not one-size-fits-all.

Thanks to solutions like the Feed.fm music API, fitness providers can offer these customized music experiences seamlessly in their apps.

Contrary to popular belief, workout music isn't just a subset of the latest chart-topping songs. Increasingly, it's becoming almost a genre unto itself. According to Mike Savage, Feed.fm Catalog Development Curation Manager, some of the best exercise tracks aren't found on Billboard's Top 10. "Malibu" by Kim Petras and "2 Hearts" by Sam Feldt and Sigma made Feed.fm's top 10 workout songs two years in a row despite never appearing on a mainstream top 10 list.

Some of the best exercise tracks aren't found on Billboard's Top 10. "Malibu" by Kim Petras and "2 Hearts" by Sam Feldt and Sigma, made Feed.fm's top 10 workout songs two years in a row despite never appearing on a mainstream top 10 list.

Top 10 Songs in Digital Fitness

Most streamed songs in digital fitness apps in 2022:

1. MONTERO (Call Me By Your Name) — Lil Nas X	2,381,745 streams
2. Kiss Me More — (feat. SZA) Doja Cat	2,369,331
3. Stay — The Kid LAROI & Justin Bieber	2,365,185
4. Butter — BTS	2,309,414
5. good 4 u — Olivia Rodrigo	2,244,652
6. Beautiful Mistakes — Maroon 5 & Megan Thee Stallion	2,232,143
7. 2 Hearts — (feat. Gia Koka) Sam Feldt & Sigma	2,213,399
8. Malibu — Kim Petras	2,211,914
9. Hold On — Justin Bieber	2,203,828
10. Sacrifice — Bebe Rexha	2,202,303

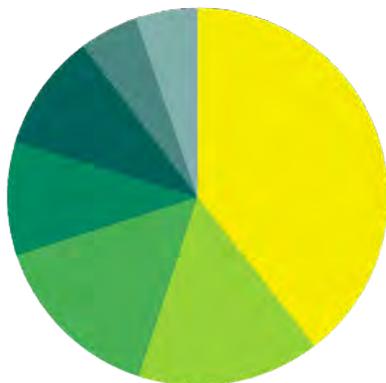
Pop on Top

Featuring dance-centric, uplifting music from the last decade, the fitness pop charts are the biggest draw for workouts. Many popular workout songs are pop hits remixed specifically for fitness. Top tracks last year include “Butter” by K-pop band BTS and “Beautiful Mistakes” from Maroon 5 and Megan Thee Stallion. Pop is showing more signs of hip-hop influences including “Montero (Call Me By Your Name)” from Lil Nas X, and “Kiss Me More (feat. SZA)” from Doja Cat. Pop is also starting to sound a little more anti-establishment punk in tracks like “Stay” by The Kid LAROI and Justin Bieber, and “good 4 u” by Olivia Rodrigo.

In 2022, pop music maintained its position as the most-streamed genre, with almost 40% of the total, but compared to 78% in 2021 it’s losing traction to Ambient and Throwback stations which each grew to 15% of the total this last year.

In 2022, pop music maintained its position as the most-streamed genre, with almost 40% of the total, but compared to 78% in 2021 it’s losing traction to Ambient and Throwback stations which each grew to 15% of the total this last year.

Top Workout Music Stations by Genre



Ambient

This genre’s popularity is no surprise given the growing devotion to yoga, pilates, and the burgeoning meditation-based wellness segment. Characterized by gentle, flowing ambient music with subtle or no vocals, ambient music is also great for relaxing, stretching, and cooldowns. The ironically-entitled “Shallow Breathing (feat. Makk Mikkael)” by Alex Lustig and “Limitations” by East Forest were in this category’s top 10 in 2022.

Sweating to the Oldies Again

Richard Simmons had it right! Throwback music and stations inspired by specific decades of yore collectively grew threefold from 5% of streamed tracks in 2021 to 15% in 2022. With Tik Tok bringing lots of oldies into people’s consciousness, we can expect this trend to continue.

Soundtracking the Workout Arc

Not only is it important to use music that inspires and motivates, it’s also important to have the right music for each phase of the workout.

The most effective warmup music has a tempo of less than 110 BPM (beats per minute) and inspiring lyrics, like “I Don’t Care” by Ed Sheeran and Justin Bieber, and “Outside” by ZAYN.

Most exercise activities involve a mixture of mid-intensity and high-intensity segments. During the mid-intensity part of the workout, trainers can increase BPMs to 110-125 with “Take You Dancing” by Jason Derulo. For a steady high-intensity phase with BPM consistently above 120, “Chain in My Heart” by Topic and Bebe Rexha or “Tick Tock” by Clean Bandit and Mabel Wild are favorite options.

To cool down, listening to a calming piece with a chill beat of less than 90 BPM can help lower heart rates and encourage deep breathing.

Keepin’ it Clean

Beats per minute, catchy melodies, and inspiring lyrics are only part of the story. With more people working out at home and an increase in children’s fitness, many of Feed.fm’s fitness partners fall in the PG/PG-13 category, so explicit (profane), suggestive, or violent lyrics are deal breakers, and the demand for appropriate songs is stronger than ever.

[Click here for the full 2022 Feed.fm report](#)

Predictions for 2023

Which music will make hearts beat faster and abs crunch better in 2023? Savage said he sees rising interest from Feed’s clients for Alt-R&B/Neo-Soul music from artists like Blood Orange, SAUKT, Jamila Woods, and others. The easy tempo of these songs makes them a growing favorite for warmups and cooldowns. He also predicts that “Unholy,” Kim Petras’s duet with Sam Smith, will make it to the 2023 top 10 charts.

Of the one billion tracks Feed.fm expects to stream in 2023, sleep and relaxation music are forecast to grow right along with the wellness movement they are part of. Fitness apps can be holistic digital environments providing clients and trainers with a supportive, calming setting that reduces stress and enhances the effectiveness of fitness and wellness programs between workouts.

One of the fastest-growing genres is music with Latin influence. Said Feed’s Curation Director Eric Stensvaag, “There’s more Reggaeton in fitness than ever before, propelled partly by the dominance of Bad Bunny.” Songs in Spanish from Rauw Alejandro and Karol G also climbed the Feed.fm charts in 2022, driving a trend that is expected to gain even more traction this year.

Popular workout music has staying power. Some

Of the one billion tracks Feed.fm expects to stream in 2023, sleep and relaxation music are forecast to grow right along with the wellness movement they are part of.

fitness music experts believe this is due to the positive association created in the exercise experience. Whether it's because they boost endorphin production or are just great songs, many of last year's top 10 tracks have been

around for at least two years, and the songs climbing the Feed.fm charts now will keep us moving for a long time.

New 2022 Releases Climbing the Charts

1. Big Energy — Latto	1,166,548 <i>streams</i>
2. When I'm Gone — Alesso & Katy Perry	667,542
3. she's all i wanna be — Tate Mcrae	664,670
4. Light Switch — Charlie Puth	659,487
5. Closer — (feat. H.E.R.) Saweetie	620,043
6. High — The Chainsmokers	614,986
7. Love It When You Hate Me — Avril Lavigne	595,405
8. Don't Wake Me Up — Jonas Blue & Why Don't We	445,463
9. Sweet Talker — Years & Years & Galantis	440,847
10. Risk It All — Ella Henderson, House Gosel Choir	371,409





The Founder's Dilemma

By Judith Russell

Startups create specific niche products that often serve a small, passionate market segment but don't necessarily have scalability or a clear path to profitability. After the first wave of consumer interest and social media buzz dies down, sales slow, and the "Founder's Dilemma" of what to do next becomes an all-too-frequent reality.

Athletech News CEO and Founder Edward Hertzman sat down with Eric Falardeau, Partner at McKinsey & Company and a leader within the firm's fitness and wellness sectors to discuss how this phenomenon is impacting the fitness and wellness industry, and what investors and fitness brands can do about it.

Edward Hertzman: Eric, you and I were introduced by mutual industry colleagues, and I of course know McKinsey from its great retail and consumer products work. What got you interested in consulting for the fitness and wellness space?

Eric Falardeau: I do a lot of work in other sectors in addition to my work in fitness and wellness, but what made me gravitate towards wanting to serve fitness and wellness clients is twofold. Yes, I have a personal interest in movement and sports. But I was also inspired by how much businesses in the sector actually care about the outcomes. Yes, business performance improvement is a requirement. But at the heart, people like to be able to tell their kids that Mommy and Daddy are there to help people live healthier lives, and here's the kind of stuff that we do. So this pride, this purpose lens, that's fantastic. This pursuit of innovation that takes place is passion-driven, driving a lot of improvement. Frankly, the fitness sector has been growing for quite a few years, and not many sectors can say that.

Edward: But there's a flip side to a passion-based proposition, right, to the emotional attachment? Do they become blinded by it?

Eric: I think the challenge is that with passion and with engagement in the category comes the increased difficulty to empathize in the least biased way with the end user. First, because people use their own products, they have assumptions and convictions about what matters to people, which tend to be biased. In the end, there are 330 million people in the US and 8 billion people in the world, a lot of whom don't look like or aspire to be high-performing fitness athletes! There's a lot of over-excitement and desire to use everything that is launched. "My friend launched this equipment," "There's a new app out there," "There's a new solution here." And let's take it all on. Now. The passion can make you inclined to consider them all. That's fantastic in that you're aware of things because you're passionate about it, but it can lead to forgetting to ask yourself the right questions before making such decisions. What matters most is really understanding "What am I to people? What is my value proposition



“ This pursuit of innovation that takes place is passion-driven, driving a lot of improvement. Frankly, the fitness sector has been growing for quite a few years, and not many sectors can say that.”

— Eric Falardeau, Partner,
McKinsey & Company

and how is it different in a competitive environment? What should I choose to adopt and pursue and why do they strengthen my ability to deliver on my value proposition?”

Edward: I find it interesting, because we’re talking to a lot of CEOs who are complaining that now, everybody’s just kind of adding on everything. Providers are trying to be everything. And they don’t realize they can’t afford to do this. So they’ve got to be selective, really be relevant. Are management teams evolving to be better equipped to handle these problems?

Eric: Executive teams in most fitness and wellness companies are rapidly evolving. Many still include folks with quite strong experience within the world of fitness, like ex-personal trainers, gym managers, athletes, etc. But they’re increasingly getting varied perspectives from people with experience in retail, health care, and other sectors. This provides more depth and diversity, which helps in decision making and execution. And from a female and male standpoint, the diversity at the average table has increased. It really needed to as this wasn’t the most impressive industry on this front. And that’s good. The invitation for these teams is to really understand their role for a diverse set of individuals in a very competitive environment. Diversity is a must to get it right.

Edward: How did we get to this place where there is so much innovation and so many products? Sure, the consumer has a strong commitment to fitness, wellness and health, so it’s not a fad. This is part of a lifestyle. So that’s great. And they have more options than ever before and they’re in the driver’s seat here. But a lot of things are in flux, uncertain, like the hybrid work schedule. So why are so many people throwing money into this? If you were to approach me right now and said I am the

Peloton of boxing, I would say there’s already someone doing it, or the Peloton of rowing, there are already 15 people trying to do that. Aren’t there smart people in the room saying that’s not a good idea?

Eric: There are a few things at play here. Fitness is a bit of a sexy place, so people like to innovate for fitness. It’s attracting investment, and there is money to be made, so there’s a lot of innovation there. The bar is rising though, and consumers are spoiled. However, their needs are still often not met. If you ask the average person on the street: “Do you live as active a life or as healthy a life as you wish you did?” they will, in general, say no. And there is room for different solutions. Different people have different preferences. While CrossFit or boxing is very appealing to a certain group, it is extremely unappealing to another group. So I do think we’re looking at a world where there will be more than one well-established, well-functioning business. We need to be realistic about the growth potential, because it’s a world of many competitors.

People want to believe something will work. There’s probably too much focus on the initial consumer reaction when people evaluate new innovations. They will look at will people like it, what are they willing to pay for it, will they use it, keep using it. While these are important components, especially in the short-term ability to generate traction for an idea, it doesn’t encompass the business side. If we think of forces of competitive success, or whatever framework we want to use, we need to ask: are there barriers to entry for other competitors to come in? Are there barriers to switching for the consumer, to change to something else cooler once it appears? Is there an ability for new models to scale enough to cause problems? Does the business model stand on its own two feet? We have a shortcoming in the sector in terms of the humility on likelihood of business success.

I believe that innovation is a core component to the continued growth of the sector, I really do. I just think



the sector needs to keep improving at thinking through which ideas are best for them and building out new solutions with a constant focus on validating what it needs to deliver both for users and for the business. If it doesn't, it's okay to retire ideas early.

Edward: A person can eat at a different restaurant every week, right? But with these fitness solutions and systems that are subscription based, you know, consumers are really forced to commit to something in most cases, and they don't want to be jumping around from one gym to another. They want to get into somewhat of a routine. I guess, you know, on the flip side is the question of whether the industry is too fragmented. Is there too much divergence going on? And will there be some convergence consolidation and a little bit more efficiency and effectiveness happening in the future?

Eric: I think so. There are offerings out there that have not thought enough about what it takes to both give consumers what they want, and to survive as a business. Some businesses have jumped the gun a bit, again, driven by passion, which is the beautiful fuel that powers this whole thing. We've got to embrace it for what it is. But I do think any type of sustained economic challenge will make it difficult for them to keep their swimming trunks on, to use a Warren Buffett image here. But I don't subscribe to the notion of "may the winner take all." I think we're looking at a narrative of "may the good offerings be the ones that are still there."

Edward: You don't foresee anyone being able to kind of be an all-in-one offering? I had a Peloton, not to substitute my gym membership at Equinox, but so I could work out at 9:30 or 10:00 p.m. when I only had 20 minutes before getting on an overseas call. It was a

complement to my routine, not a replacement. But if Equinox were to say to me "here's a bike for \$999, and for part of your membership you can have a subscription to at-home content," I think I would probably be quick to buy that bike and put it in my house and pay for one subscription. And maybe Equinox tried to do that with SoulCycle, but right now, no one owns the consumer. No one is really doing that.

Eric: Let's start with your comment of "owning the consumer." While that is appealing from an investor or a business performance lens, because it simplifies things, and gives more leeway, I think humility is required. We need to ask ourselves, is this what a consumer wants? Can I add enough value from my unified experience to be the choice versus a list of things? So my perspective is, from an end use case, the way the person is being guided to move, eat, sleep or whatever the components of this broader definition of wellness includes, I would be hard pressed to think that there are brands who would "own" close to 100% share with their consumers.

There will always be a group of CrossFit folks, who feel they would marry CrossFit, follow their eating recommendations, follow anything. Zumba is another brand with a huge group of super enthusiastic followers about anything that Zumba sends their way. But the majority of people choose the offerings for specific reasons and choose other offerings for other things.

“ The bar is rising though, and consumers are spoiled. However, their needs are still often not met. If you ask the average person on the street: “Do you live as active a life or as healthy a life as you wish you did?” they will, in general, say no.”

Edward: There are so many equipment people struggling right now, but who's going to buy them? Is the industry too fragmented to get real loyalty and scale today? What is the exit strategy of all this? Because if you're buying a net negative business at the end of the day, you need to have the economics to absorb losses while building an operationally efficient and profitable company. Will a New York Sports Club or an Orangetheory have the inclination to absorb a billion-dollar loss. If not, who will? When you're talking to these companies, what do you tell them is the end game?

Eric: For the exit strategy, it varies a lot based on the

business, but for the majority of the good businesses that are relevant to humans, with a business model that could stand up on their own feet, the question becomes can you believe in the next growth chapter post-whatever we're doing now. Now, this is where it's going to vary business by business. But when I consider how important it is to people to get healthy, and to what degree that need is still unsolved, that's why I get optimistic that there's still a lot of opportunity, and the investment is often less than what you pay for fashion and/or food and/or entertainment and/or cell phone and/or car. Those who are price sensitive are helped by all the competition in the sector. There's more than one opportunity for all of these solid businesses with solid consumer offerings to grow. The predominant mindset of these companies is growth. Everybody is seeing the potential to impact more members positively. And I would say that at least two thirds of the discussions with executive teams is about growth, despite the fact that they're assessing factors for resilience, if they think it's needed.

Edward: Growth can come a couple of different ways, right? You can have more new people participating in the fitness market, if only 20% of Americans are exercising regularly, that leaves a lot of opportunity. Or you get the people who are already participating to spend more of their disposable income on fitness. Do you see the market shifting demographically? In other words, are millennials and Gen Zers going to drive up that percentage of the population because they are wired to include fitness and wellness as part of their life? Versus baby boomers who can still look at you like you're crazy if you ask them if they work out?

Eric: Well, I think you can make that last statement for all generations. But we definitely see a high degree of importance, consideration, activity, and voting with their dollars from younger cohorts. And that's actually helping some of the recovery across most gym markets. When you dig into the numbers, what you actually see is that the younger generations have actually represented a lot of the growth. There is still a certain reluctance from other cohorts, who are finding that their at-home workout options better suit their needs and preferences. While COVID no longer dominates the news or the talk around our dinner tables, there's still the reality that some groups are more at risk.

But I actually get optimistic because if we see folks who are 20 years old now choosing to pay and partake in the world of movement, we are more likely to see this group when they're 50 still doing this. We've seen this as cohorts have aged in the past.

Edward: Which is why, I believe, we're going to keep seeing the innovations and the products come out and the money follow. So, this is not going away.

Eric: I very much share that perspective, and there's nothing that I have seen in any way shape or form, from people's resolves, or consumer surveys, or talking to

many consumers qualitatively that would lead me to believe we're looking at a little fad. This is an important component, and every trend is helping, even though I think trend is the wrong word. Everything that's happening, the realization of the importance of balance and self-achievement and access, to having what you do in life physically or for health become an important component of who you are, is helping the potential innovation and growth. I think we're facing a business challenge, which is how do we make good business decisions?

Edward: Do you see anything in the economic headwinds that concerns you about being able to do what you do and being able to advance the cause for consumers? Coming out of COVID, we're hearing a lot of people say how happy they are to be back with their community at the gym or the studio, and they don't want to give that up right now, so they'll forgo something else. Maybe they won't buy a new Lululemon outfit, but they'll keep going to the gym and keep seeing the trainer.

Eric: If you're in the world of consumer discretionary offerings, and people's wallets get a bit trickier, or their perception of their wallets gets trickier, then you're not swimming in as good a pool as yesterday. So I think to some degree, it's something to watch out for, but then the question becomes to what extent. What gives us quite a bit of comfort is that moving better, eating better, sleeping better, whatever you include in this wellness objective, are way too important to be the first thing on the cutting block. If you have the unfortunate reality of losing your employment, then you need to cut across all fronts, of course.

But mostly what we see is the consumer choosing to keep paying for fitness and wellness for a couple of reasons. Number one, because the importance of it is too strong. This is supported both by how things played out in 2008 and by whatever survey we conduct today. Secondly, because the spend per person is still not that high compared to how much people spend on cell phones, cars, entertainment, or their daily coffees, it's often not the biggest spend bucket. If you were to plot the inherent importance versus potential value to save, there are other candidates that consumers see as more logical alternatives to cut. And we've seen that very consistently.

In 2008 the sector wasn't that developed, so we saw overall resilience, but there was limited ability to observe the likelihood for rationalization or switching. Today, people are spending across quite a few different fitness offerings, and there are more alternatives to choose from, so we might see some mix shift and rationalization of offerings/subscriptions. When we ask people in surveys, they hint to that being a potential logical decision. But the jury is still out.

Wellness Startup Brand Buzz

By Candace C. Smith

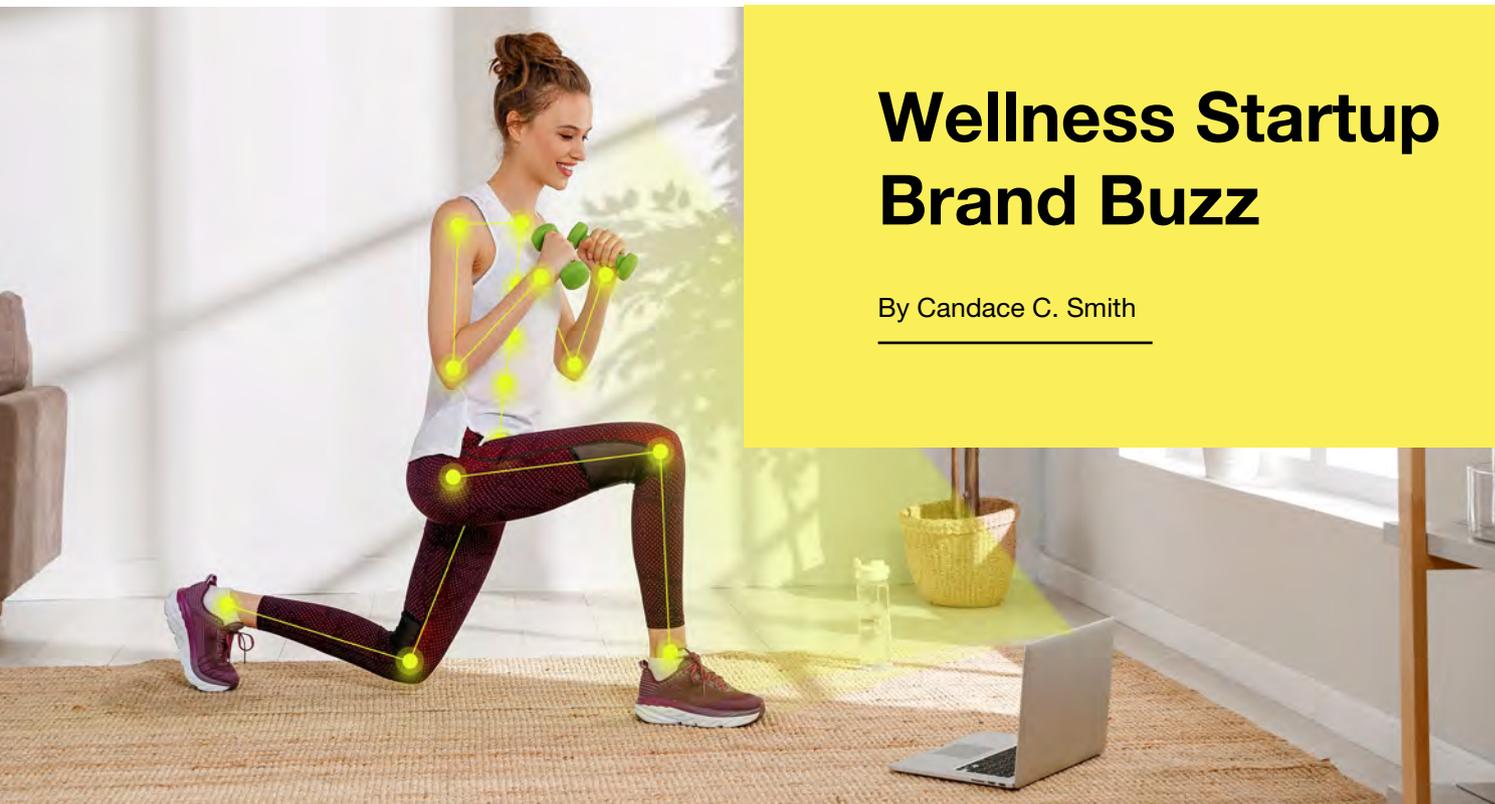


Photo courtesy of Kentai

A new crop of startup health and wellness innovations hopes to find success filling underserved consumer needs in 2023. Here are a handful to keep an eye on.

Despite the plethora of options already available to consumers in the fitness, health and wellness space, from the latest keto cereal to a new period underwear brand, the innovation just keeps on coming.

Demand for new health and wellness products and services, buoyed by rising healthcare costs and a renewed interest in wellbeing, is driving a bumper crop of startup brands and the introduction of new products from existing brands.

Although most of the innovations are taking the form of apps, there are also DTC subscription e-commerce platforms, testing systems for everything from vitamin deficiency to overuse of alcohol, and connected products using artificial intelligence, biometric tracking, and other technologies.

Artificial Intelligence

2023 began with OpenAI's chatbot ChatGPT taking every market by storm, health and wellness included. Artificial intelligence, considered by many to be the next big frontier in information technology, was in 2022 valued at \$136.6 billion, [TechJury](#) reports, and is projected to grow to \$1.8 trillion by 2030.

Experts predict the rise of the "smart" home gym which offers AI-generated personalization, a crucial element that would give at-home workouts an edge over competition.

Tempo is using AI to help users of its products achieve correct form during their at-home workout sessions.

Tempo, which just reduced the price of its Tempo Move smart home gym amid the company's plans to amplify its AI and 3D sensor technology along with "a personal trainer experience," is taking advantage of the progress AI has made in the past couple of years to provide high-end equipment and exercise offerings with cutting-edge technology at reasonable prices.

An at-home workout set to Peloton's AI-powered guide camera can track a person's movements, correct a person who is in poor form, and further personalize with recommended classes based on individual health and fitness needs.

Motion-tracking home workout platform [Kentai](#) uses computer vision technology and AI to provide users with real-time feedback and corrective guidance during workouts, like having a coach with them at all times.

According to Grand View Research, 2022 healthcare-specific AI totaled \$15.4 billion in 2022, and is expected to grow at a compound annual rate of almost 38 percent between 2023 and 2030.

[Health Exec](#) reported that the [Food and Drug Administration](#) (FDA) approved more than 520 artificial intelligence medical algorithms within the United States.

With interest in artificial intelligence growing along with the public's demand for better, affordable and efficient healthcare products and services, forward-thinking brands and companies are using AI to deliver new wellness products and services.



Photo courtesy of Kemtai

Spotify founder Daniel Ek and energy data company Watty CEO Hjalmar Nilsson co-founded Swedish health-tech company [Neko Health](#). Launched in February, Neko aims to offer a “healthcare system that focuses on prevention and early detection” using AI and sensor technology.

San Francisco-based [Virta Health](#) has a noble mission: to reverse type 2 diabetes by providing AI-enabled personalized diet plans to reduce insulin resistance, the primary cause of type 2 diabetes. The software delivers advice and coaching via a mobile app or website. A clinical trial with 350 patients showed the Virta Health personalized diet program reversed type 2 diabetes in a majority of patients. Virta patients lose over 30 pounds on average within the program’s first year.

Another buzzworthy new healthcare businesses, AI biotech company [Owkin](#), partners with medical providers to use patient data to predict risks and outcomes.

According to Grand View Research, 2022 healthcare-specific AI totaled \$15.4 billion in 2022, and is expected to grow at a compound annual rate of almost 38 percent between 2023 and 2030.

Ultramodern AI technology is also making daily habits like nutrition tracking an easier endeavor for all with smart nutrition-centered offerings such as ELO Health, a supplements brand which is using biomarker testing and AI technology to provide personalized programs that close the gap between nutrition and healthcare. Elo uses at-home blood testing with a simple finger prick, activity metrics, and AI to analyze biomarkers and health data to recommend specific supplements instead of questionnaire-based supplements. The customized supplements are then delivered on a monthly basis.

[VersaWare](#), with its smart wifi-enabled kitchen appliances with Recipe AI, made its debut at CES 2023. The product line features a washable mixing bowl and cutting board equipped with phone connectivity and long battery life. VersaWare appliances promise to save time by giving a quick and accurate breakdown of nutrition so users can truly understand what they are eating.

E-commerce Customized to Health and Wellness

In a world where one can order anything they’d like with the press of a button, investing in subscription-based e-commerce is a keen business move, especially within the fitness, health and wellness terrain.

“Built with the end customer in mind,” Smartrr is the mediator between direct-to-consumer Shopify brands and brand users as a “premier subscription experience.” As “[deinfluencers](#)” gain considerable steam and social media followers seek to find authentic brands and tastemakers they can become loyal to, e-commerce in the healthcare and fitness industries is prime for a seismic shift toward more recurring purchases through subscriptions. Wellness and personal care brands using Smartrr include Arma Colostrum, Stix and Begin Health.

AirTank’s CareCart says it is the first-of-its-kind in healthcare and medical technology solution allowing e-commerce brands to comply with HIPAA, PCI, SOC, ADA, and more — right out of the box. CareCart gives the [healthcare industry](#) exclusive accessibility to personalized secure, private shops built solely for the healthcare and medical sectors.



Photo courtesy of Elo Health

Wearables

Whoop took the world by storm when they launched the first fitness wearable in 2015, but always fell short in the water resistance department. Enter TYRxWHOOP swimsuits, the collaboration between Whoop and the innovative racing swimsuit brand, which debuted in fall 2022. The TYR suit has a clever inner pocket that holds the WHOOP 4.0 sensor fast to the skin, thus eliminating drag created by a wrist-worn wearable. The suits for men and women are made with an antimicrobial fabric that’s 100% chlorine proof and able to track swimmers’ various heart rate metrics and calories burned for more than 300 hours. Whoop’s valuation is estimated at \$3.6 billion, making it one of the most valuable standalone wearables companies in the world.

Wearables have become mainstream, and the 24/7, 365 health metrics they generate are full of untapped potential, according to Rook, a new B2B data and insights company. The company has set out to integrate the fragmented wearables market made up of hundreds of devices that have each required one-by-one

integration and individual maintenance to extract and analyze their data. Rook brings health metrics from more than 300 wearable devices and other health sources into existing apps and software, saving valuable developer time and providing actionable insights more quickly. Rook can receive data from any source, making it easy to connect and engage with users and empowering companies to better connect with the biomarker data they need to validate and predict behavior and enhance user experience. The company just completed both a rebranding and an oversubscribed \$1.7 million dollar round of VC funding, and counts Pankaj Kedia, one of the founders of the Qualcomm wearables business, among its angel investors.



Photo courtesy of Eight Sleep

Sexual Health

A crop of new brands dedicated to the betterment of personalized sexual wellness have surfaced in recent years.

[TBD Health](#), launched in 2020 by best friends Daphne Chen and Stephanie Estey, allows for at-home STD testing “made easy,” with their test kits that free people from the judgement and stigma of going to the doctor for such diagnostics. The TBD platform also provides “...supportive sexual healthcare, making it a routine, easy part of taking care of yourself,” as well as at-home and in-clinic screenings, emergency contraception, education, counseling, aftercare, and virtual and in-person education.

TBD Health’s services are available in 49 states with New York “coming soon” and other locations in an effort to “reach those in sexual healthcare deserts.” The company recently raised \$4.4 million in order to expand its geographical reach, and opened its care hub in Las Vegas. Chen and Estey feel that at-home sexual healthcare “is going to become a daily part of everyone’s lives, similar to exercising and other wellness rituals.”

Other growing brands in this space includes women’s sexual wellness apps [Stix](#) and [Rosy](#), men’s app [Hims](#), and family/fertility solutions [Conceive](#) and [Ovia Health](#). There have also been several solutions targeting older women, like menopause and weight loss app [Winona](#), menopause app [Womaness](#), and menopause and sexual health solution [Tabu](#).

Other Products to Watch

Two other compelling new innovations seem to be the first in their categories.

Launched through a crowdfunding campaign in 2015, [Eight Sleep](#) is a smart thermo-regulation and sleep-

Chen and Estey of TBD Health feel that at-home sexual healthcare “is going to become a daily part of everyone’s lives, similar to exercising and other wellness rituals.”

health tracking system. Its Pod 3 Cover, which was released in July 2022, provides serious sleep trackers a pad that simply goes over their existing mattress, but contains a grid of water fed by a small bedside tower that can customize temperatures from 55 degrees to 110 degrees in two separate zones. To fully optimize sleep, the water slowly warms up throughout the night, then gently awakens the sleeper through a vibrational alarm clock. Analytics on an app track your sleep performance, consistency, tosses and turns, heart rate, and sleep phases, then give you suggestions for making every cycle count. Users increase deep sleep by up to 34%, with results of up to 10% seen after just one week of sleeping on the Pod 3. The company has raised \$160 million, including from celebrity investors such as Alex Rodriguez and Kevin Hart, who also say they are dedicated users.

[Reframe](#) is a neuroscience- and evidence-based app to help people develop healthier drinking habits by changing their relationship with alcohol. Launched in 2020, Reframe provides cognitive behavioral therapy on demand, offering a personalized daily alcohol reduction program, community support groups, progress tracking, craving management tools, and coaching--all for \$14 per month. In 2022, Reframe expanded significantly and began running live, round-the-clock group coaching sessions so that people in need can get expert support 24/7 at no additional cost. Reframe has been downloaded more than 2 million times worldwide and grew from \$4M to \$13M in annual recurring revenue from 2021 to 2022. The company raised \$10 million in April 2022 at a \$350 million valuation.

As we get used to living with the constant threat of new diseases like COVID-19, which tend to hit the immunocompromised harder than others, personal and preventative health has become top-of-mind for many people. We can expect continued launch of health, fitness and wellness apps designed to improve our quality of life and lengthen our lifespans, while shortening the time we spent seeking to do both.



Photo courtesy of Rook



The Medical Community Sounds the Alarm on Childhood Obesity

How the fitness industry can help

By Courtney Rehfeldt

The American Academy of Pediatrics (AAP) has classified obesity as a common chronic disease that affects over 14.4 million children, or more than 20% of the age 2-17 population. When left untreated, the condition can lead to serious short- and long-term health issues including cardiovascular disease and type 2 diabetes.

The Academy, which released its first clinical practice guidelines on the topic in the February 2023 issue of Pediatrics, along with related documents [Clinical Practice Guideline for the Evaluation and Treatment of Children and Adolescents with Obesity](#) and its [executive summary](#), asserts that obesity should no longer be stigmatized as a consequence of personal choices, but rather be treated and understood as a complex disease.

A Problem Long in the Making

Childhood obesity rates in the United States have [tripled](#) over the last three decades, with one out of every three children classified as overweight or obese. Oft-cited reasons for this trend include a general decline in physical activity among children, increase in availability of high-calorie fast and snack foods, and genetic and socioeconomic factors.

The COVID-19 pandemic accelerated the problem by causing significant disruption in the lives of children, adolescents, and teens, many of whom were exposed to situations that accelerated weight gain, such as irregular mealtimes, less access to nutritious foods, and fewer opportunities for physical activity in the absence of a gym class at school or recreational sports.

Parenting during the pandemic was understandably chaotic. While some parents were able to work from home, there was added stress from balancing work life while caring for children and helping them navigate the new terrain of online classes. Some parents had to risk exposure to COVID and report to workplaces, compounding worries over reliable and affordable childcare.

Overall, the added burdens of a pandemic meant that the average American family had more on its plate - in more ways than one.

With lockdown orders in place, upheaval of the normal routine that many children find comfort in, and parents focused on managing a sudden increase in stress from all angles, some children were prone to being sedentary, overeating, and logging more time on [gaming](#) and social media platforms than before.

Childhood obesity rates in the United States have tripled over the last three decades, with one out of every three children classified as overweight or obese.

Bad Habits Die Hard

Now that the worst of the pandemic is behind us, the weight isn't necessarily coming off. Experts say that while obesity-promoting behaviors were already increasing from year to year prior to the pandemic, they increased dramatically after the pandemic began and remained in place.

According to the findings of a 2021 [NIH-funded study](#) published in Pediatric Obesity, American children may have adopted a variety of behaviors that continue to increase their risk of obesity beyond COVID.

The children in the study, who ranged in ages from 7 to 12 years old, increased their sedentary behavior, screen time, and food intake while decreasing their physical activity and sleeping later after the return to pre-pandemic routines. The changes in behavior exceeded those seen during summer vacations.

Another contributing factor to childhood obesity may relate to the decline in physical education in schools. Even with in-person school back in session, according

to recent reporting by [ABC News](#), three-quarters of the states in the US are experiencing a teacher shortage, including in the field of P.E. This issue existed before the pandemic, with physical education being placed on the backburner in many American schools due to lack of resources and an increased importance placed on academics versus physical activity.

What Can Be Done?

According to the AAP, childhood obesity can be treated safely and effectively by considering genetic, physiological, socioeconomic, and environmental factors. It does not agree with “watchful waiting” or delaying treatment for children with obesity.

One thing is certain: the AAP is resolute that treating childhood obesity should be approached as a ‘whole family’ effort. Pediatricians are urged to use a family-centered and non-stigmatizing approach that “acknowledges obesity’s biologic, social, and structural drivers,” with patient-centered care delivered with consideration of the child’s household and familial influences, access to healthy food and activity spaces, and other social determinants of health. Recommended treatments include “...nutrition support, physical activity treatment, behavioral therapy, pharmacotherapy, and metabolic and bariatric surgery.”

Planet Fitness has been aggressively attracting GenZers to its facilities, and reported in September 2022 that teens logged an impressive 17 million workouts with its Summer Pass program.

Before turning to some of the more drastic solutions like surgery, some parents and medical providers are, not surprisingly, trying the fitness and nutrition route first.

How the industry is responding

The fitness industry is responding to this national crisis by developing common-sense solutions while remaining tactful and inclusive. Fitness businesses are finding success in offering classes for young children or a joint parent/child class, giving families an opportunity to get healthy together.

Marc Santa Maria, Vice President of Group Fitness, Crunch Fitness, said “Fitness companies and any company related to wellness and children should respond to the APA’s powerful statement by asking, ‘What can we do as a company and with our resources in the short term and the long term?’ We should also start exploring ways we can share that message with our teams and our people and encourage an awareness of ways we can help combat this crisis.”

Planet Fitness, in response to a national study it conducted finding that 93% of teens in America wanted to stay healthy and active over the summer but lacked either motivation or access, launched High School Summer Pass, aimed at teens aged 14 to 19. The program allows teens to work out for free at Planet Fitness facilities from mid-May to the end of August.

Chris Rondeau, CEO of Planet Fitness, has stated that the company believes it has a responsibility to provide a welcoming environment for teenagers, especially in light of the difficulties many of them have faced due to the pandemic. “Fitness is about feeling good, too, and our hope is that High School Summer Pass empowers teens to create life-long workout habits to help them succeed in every aspect of their lives,” Rondeau said of the program.

Planet Fitness has been aggressively attracting Gen Zers to its facilities, and reported in September 2022 that teens logged an impressive 17 million workouts with its Summer Pass program.

Planet Fitness follows the AAP guidelines of involving the whole family with its program. The fitness franchise reported it drove member growth through its summer program with a targeted acquisition strategy that led to parents and guardians signing up for a Planet Fitness membership, too.

Coaching company Exos is meeting the needs of children who may not otherwise have access to physical fitness opportunities due to socioeconomic or environmental factors with Coach for Good, its first social impact program that meets children where they spend a great deal of time: school. The fitness program, launched in January 2023, provides brain- and body-activating fit breaks. It was implemented in 15 New York City public schools in collaboration with Wellness in the Schools (WITS).

Coach for Good offers students virtual on-demand and live-streamed fit breaks and will impact over 7,000 students daily by providing 15-minute fit breaks.

Schools will earn Exos-inspired incentives, such as guest appearances by coaches and athletes, to keep students motivated to keep up with daily fitness practices. When introducing the program, Exos CEO Sarah Robb O’Hagan stated that the initiative focuses on mindset, nutrition, movement, recovery, and rebuilding healthy habits as children adjust to a new normal post-pandemic.

Starting Young

The AAP guidance includes recommendations on care for children starting at age two, and many fitness companies have responded by providing family or children’s classes like swimming, tumbling, and yoga for kids as young as two and three years old.

Crunch Fitness recently launched Crunch+, a digital platform for entertainment fitness that allows all members and their household access to exercise routines and classes remotely. One of these classes includes Yoga Mamas & Papas, which is designed for kids in a family-friendly yoga session. Crunch has also partnered with elementary and middle schools to provide support in the fitness arena through “Sweat School,” and offered volunteer group fitness instructors from its team to lead workouts for kids in a variety of events, including open house classes in several of its Signature club locations where parents needed support.

The Les Mills Born to Move program, which targets kids ages 2-17, was launched several years ago to help

tackle the issue of childhood inactivity. The company is working with YMCAs and community centers across the US to get more children moving.

“Children born after 2005 have a lower life expectancy than those born before 1990. We have to change this, and movement and food choices are mission critical.”

— Alicia Kockler, SVP of Kids and Aquatics, Life Time Fitness

Life Time Fitness serves young children and teens through Life Time Kids, which serves hundreds of thousands of young participants annually. In addition, the program offers engaging activities like summer camps, swim lessons, and group studio classes designed with children in mind, and welcomes kids as young as two or three.

The company is extremely concerned about the health problems facing children. “Children born after 2005 have a lower life expectancy than those born before 1990. We have to change this, and movement and food choices

are mission critical. Our goal is to make exercise and healthy habits fun for children, so that it becomes a lifelong habit,” said Alicia Kockler, Senior Vice President of Kids and Aquatics at Life Time.

“These programs promote physical activity and teach important skills like teamwork and communication in a fun environment,” said Kockler. “We also know that families with engaged kids come more often and remain members longer. It’s the kids that get Moms and Dads to come because they love it so much.”

The company is also offering healthy kids menu choices at its LifeCafe locations, and working with schools and other mission-driven organizations through a non-profit. “Our Life Time Foundation is solely focused on improving children’s health by working with schools to improve school food and increasing movement,” said Kockler. “Where we have an opportunity to make an impact, we are.”

Bente Smart, Director of Education & Fitness Operations, Crunch Fitness, feels that the fitness industry needs to take advantage of all the tools available to it to create more opportunities for the next generation to be active. “Fitness companies have spent most of their time and energy targeting fitness for adults. They should explore having further involvement and participation across all age groups to get children more active now before it becomes an adult issue.”





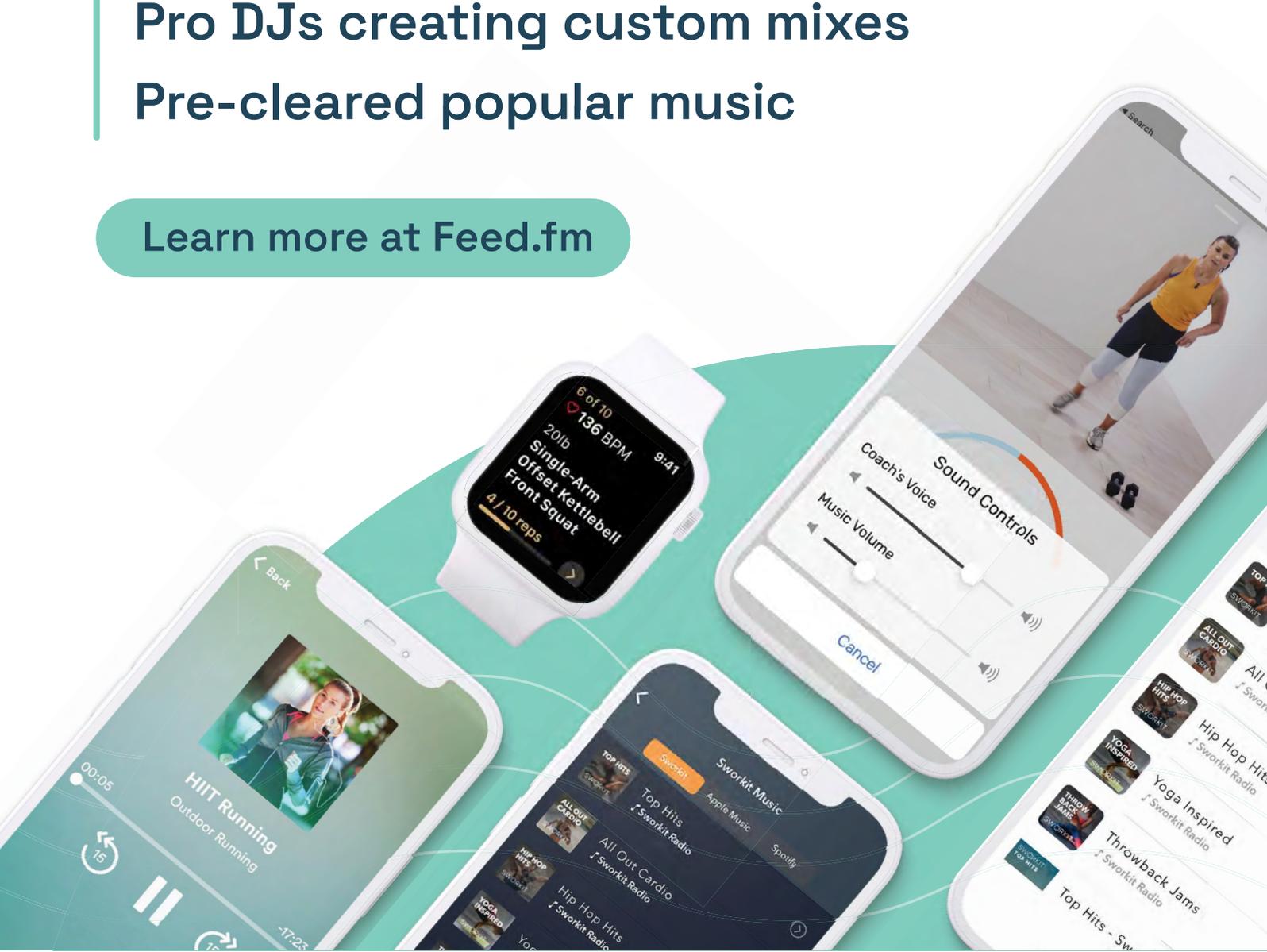
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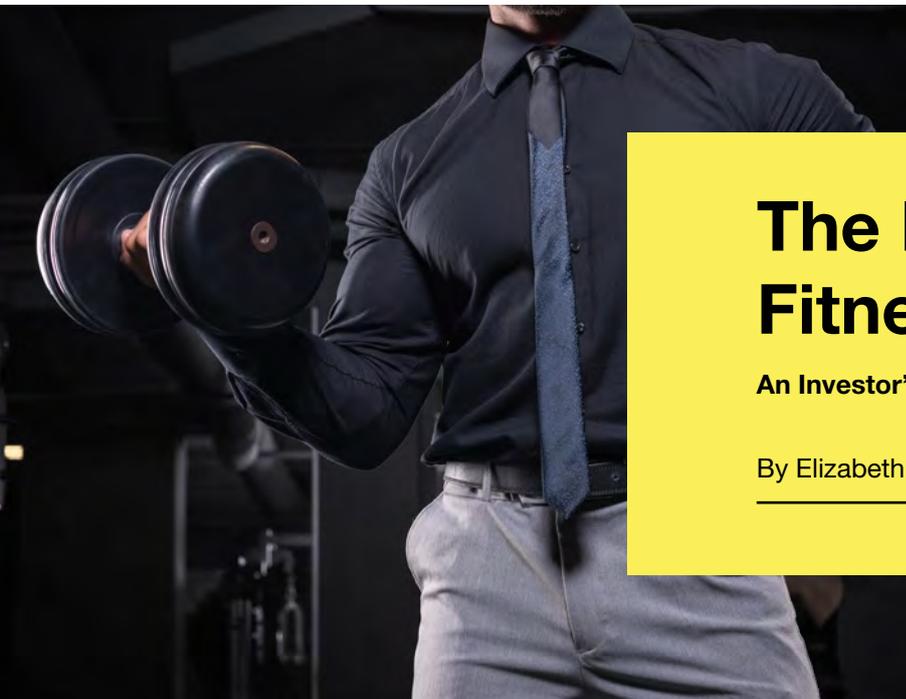
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The Big Financial Fitness Workout

An Investor's Perspective on the State of the Industry

By Elizabeth Ostertag

Jon Canarick is a Managing Partner at private equity firm North Castle Partners, where for over 20 years he has managed investments across a variety of Healthy, Active, and Sustainable Living sectors. Jon currently sits on the Boards of Directors of Therabody, Five Iron Golf, Echelon Fit, CR Fitness, Encore Vet Group, The Escape Game, Barry's, and SLT.

Jon shared with us his perspectives on how the investment community is approaching the space, how the various segments of the industry are faring, and what advice he gives his portfolio companies as they navigate the new normal of fitness and wellness.

Athletech News: Can you talk us through some of the factors that drove growth leading up to the pandemic, and what COVID did to the fitness industry?

Jon Canarick: The industry has been through a lot of turmoil. In the period from 2010 to 2020, there was this incredible amount of innovation in the four-wall side. Boutique fitness went from nothing to this very significant industry with meaningful household name brands. Private equity poured into that side of the industry, as brands like Equinox and Soul Cycle emerged.

And then Planet Fitness led a revolution in pricing model, and the many millions of people they took from non-fitness members to members was unbelievable, right? The percentage of Americans that were members of gyms or studios was 16-17 percent for years and years, and on the backs of Planet Fitness that number grew to over 20 percent.

And then COVID hits, and all of those gym businesses go from feeling great to just absolutely destroyed. COVID drew a tremendous amount of capital into home fitness or, its sexier name, "connected fitness." But at the end of the day, it obviously created growth that no one could ever have possibly imagined and that no one was remotely prepared for. And home fitness went from

this Peloton-led revolution to an explosion of billions of dollars of capital and investor interest which ultimately contributed to what is now the demise of the connected home fitness market. Way too much capital went in. Way too much. Two to three years after that growth started, it is very clear that COVID and all the capital and all the growth completely destroyed the 2.0 version of the home fitness industry.

Connected fitness's infrastructure was built on a model that really wasn't designed to support that kind of infrastructure. This is not big tech. It's consumer tech, and those are different things. So, the industry is still figuring this all out. Now you have connected fitness obviously struggling and home fitness in general struggling. Then, you have the traditional industry rapidly recovering but still recovering, right? So, I think investors who aren't intimate with it are still trying to figure it out, and there's a lot of hesitancy right now in the investment community.

ATN: What impact did COVID have on a company like Peloton?

JC: I've said quite often that COVID was the worst thing to happen to Peloton. Had it not been for the pandemic, Peloton would have had many years of sustained 25% to 50% growth rather than hundreds of percentage points of growth followed by a crash.

During COVID, a lot of capital came in to boost competitors as well. So, what the investment world thought is, Peloton was primarily a bike, but there was an opportunity to be "the Peloton of ____." People felt that a home gym will have two or three of these things, especially as it relates to companies like Tonal and Tempo. Because strength and cardio are different, right? I do find that to be an easy leap of faith.

In the case of Echelon, which is an investment I made before COVID, our whole thesis was that connected fitness is brilliant. Connected fitness should be for the masses. And so, Echelon was connected fitness at a



“ COVID was the worst thing to happen to Peloton. Had it not been for the pandemic, Peloton would have had many years of sustained 25% to 50% growth rather than hundreds of percentage points of growth followed by a crash.”

— Jon Canarick, Managing Partner, North Castle Partners

mass market price, Walmart and Costco being our two primary retailers. The logic was there. We weren't trying to be the Peloton of a different category. We were just trying to bring a Toyota to the BMW market.

Had there never been COVID, I believe Peloton would still have an average bike price north of \$2,000, and Echelon would have an average price of \$750, and the two companies would have been a nano of their size. I don't think Echelon would ever be close to catching up but there would have been plenty of market size for it to draft off of Peloton's popularity.

What COVID did in terms of being so horrible for the industry was everyone went from no inventory to five times more inventory than they needed, just like that. And then what happens when there's an inventory glut in every company? Everyone goes on deal. The fact that you could have bought a Peloton for about \$1100 dollars during this past holiday season is amazing, relative to the pristine brand that they had cultivated all those years. They were a company that never went on deal. Maybe you got \$250 worth of free accessories, which is just a bundling concept, right? Their bike wasn't designed to be sold for \$1100. They're literally selling their bike for less than it cost to make it. And if there's a huge marketing campaign to convince you to buy that bike, or that rower, or that treadmill, and if you're not making enough dollars per bike, you are very far behind the eight ball. That's hard. If it takes three years to make that money back through subscriptions? You're chasing your tail forever. You'll never be profitable.

ATN: Now as you talk to your portfolio companies, what advice are you giving them on how to handle or pivot their businesses? What is the playbook that you're telling your companies to follow now?

JC: Well, the general matter, and this is in lots of industries, not just fitness, is I'd rather grow less quickly and more profitably than grow faster and not profitably. We've never been a heavy loss producing

type of investor. We're not attack investors, we are consumer products investors. The thing that happened in this space is that it had tech and consumer smashed together. You had a tech mentality, where essentially incremental cost to delivering is very, very low, come into a fundamentally consumer-driven category that has a real cost of goods sold. Consumer companies can't absorb the kinds of losses tech companies can to get to the future. Right now the advice is to reduce marketing expenses, such that we're acquiring customers profitably. I'd rather acquire fewer customers than acquire more at a loss thinking we'll make up for it later because the carrying costs of those losses are just too high. And that's the difference between zero or low interest rates and where we are now at more normalized interest rates. The only exception to what I just said is Peloton. They went into this slowdown with \$1.4 billion worth of inventory, so selling it at a loss makes sense. When all of that cash is sitting in the warehouse anyway, you may as well monetize it at a loss. But once you cycle through that, you can't justify buying bikes to sell at a loss.

ATN: Do you see much M&A happening this year? And if so, in what categories?

JC: I don't see a lot happening this year. It's nothing but inside round after inside round so that people can keep their businesses alive whether they're P&L challenged, balance sheet challenged, or both.

The home fitness guys, which is more P&L challenged, just keep losing money. Tonal just got more shareholder capital, as did others, but I really don't see anything terribly interesting happening right now. As companies get healthier in 2024, I think it is more likely we will see real M&A then.

But I'm not convinced it makes sense to do hybrid acquisitions. The issue is that the four-wall fitness companies are very clearly a profit-driven model, right? So, it is hard to justify acquiring a company that makes no money. Are you going to be able to bring down the

profits of the whole enterprise? That's what someone has to figure out. Again, Equinox wanted to do it on their own. And they did, but it didn't work out, but it could have worked had it not been for all their COVID issues.

ATN: Is it accurate to say that the fitness and wellness and even health space will grow as interest in well-being, personal care, and mental health continues to grow? That it's not a shrinking market, but one where the challenge is to meet consumers wants or needs and how to service them and build profitable businesses?

JC: The interest in health and wellness continues to go up and to the right and consumer dollars continue to go into health and wellness services and into things that are trying to create a healthy appetite or healthy lifestyle. A lot of businesses are just getting the healthy healthier. The issue is the unhealthier a consumer is, the less committed they will probably be, so the less you can

justify developing for and marketing to that customer. So, you can't spend a lot of money trying to acquire customers who are not likely to stay on your plan for a very long time. It's just not profitable.

“ A lot of businesses are just getting the healthy healthier. The issue is the unhealthier a consumer is, the less committed they will probably be, so the less you can justify developing for and marketing to that customer.”



Photo courtesy of Xponential Fitness



Virtuagym and the Democratization of Fitness

Co-Founder of Global Fitness Software Provider Sees Biggest Tech Opportunity in Motivating the 85%

By Judith Russell

Athletech News sat down with Hugo Braam, the Co-Founder and CEO of Virtuagym, to discuss how Virtuagym's fitness software and digitization in general are driving the democratization of fitness. The company, with offices in the Netherlands and the Americas, serves 9,000 fitness businesses, 45,000 trainers, and 20 million consumers in 80 countries around the world with its all-in-one business management, coaching, engagement and communication solution. According to Braam, gyms have a huge opportunity to help more people be healthy and grow their business by using technology as a motivational tool.

Athletech News: How are fitness technology platforms like Virtuagym helping gym and studio operators spend more time working with customers and making fitness accessible to more people?

Hugo Braam: Right now, most gyms are using software to automate repetitive human tasks, which is extremely valuable because it allows you to do more with less, and to focus time on other things. Rather than spending hours over spreadsheets, gym owners can quickly automate processes and use dashboards at a click of a button. Saving that time helps them to increase the level of service for a broader number of people by automating parts of the client journey and supporting the personal touch. We have clients that use tasks and reminders in preset protocols to personally call clients to see how they're doing after the first 30 days. This is really where technology and the human touch can go hand in hand.

But the most exciting benefits of technology, and something we have seen especially following COVID, is how it is making fitness easier to access. I call it the democratization of fitness. For example, some people

are maybe less competent at fitness. They would just walk into a gym and have no idea what to do, feeling a bit bad about having to ask for support. You can easily and quickly lose them as members. So instead, you provide them beginner workout plans in a mobile app so they can self-serve themselves using technology, which is great for them, and also for the business.

ATN: So would those people who maybe wouldn't have done any kind of fitness before start at home then go to the gym? Meaning it drives a kind of beginner's hybrid model?

HB: Definitely. Technology also allows us to diversify the fitness offering, for example by creating a personalized set of strength exercises to do at home. But also, if you don't like strength exercises, you can do a Pilates workout video, or you can do a dance workout video. Although it wouldn't be efficient or affordable for a gym or studio to have all of these teachers on the payroll, by having this workout library in the app, it can really extend the offering and make it more interesting to a broader group of people. Technology can provide that low level entry access because insecurity is a big hurdle for many people in their desire to get fit.

People can be extremely accomplished in other fields but when it comes to personal health, it's different. They feel vulnerable. We all know that getting out of our comfort zones and not knowing what we exactly need to do is difficult. Technology can provide that safe, low-threshold support level that helps people build confidence, which in turn will help prevent those members from churning.

ATN: Has the fitness industry been slow to adopt technology?

HB: Historically, I feel our industry was 20 years behind others. I think tech hasn't been a real focus for fitness because many people in our industry are traditionally real "people people" who don't like to sit behind computers all day, and I believe this has slowed down the initial adoption. Right now, though, technology has become more accessible as everybody has a mobile phone and uses apps, and at the same time we're seeing more tech-minded people entering our industry as well, so luckily this has finally changed.

We launched our business 15 years ago in the B2C space from the coaching side, supporting people with personalized workouts and nutrition plans within a social environment. Ten years ago, we pivoted towards B2B after getting requests from fitness businesses saying "you've got this great tech, can we use it to coach our clients"? At the time, that was really avant-garde. Digital coaching was considered a nice-to-have. So in order to drive our success in the market, we started adding business-critical solutions for scheduling, then member management, access control, and other tasks. Today, we're at a point where digital coaching is now being considered business-critical by many as well. This trend was accelerated by COVID, and professionals in our industry now finally realize the importance of leveraging technology within the coaching domain. This is despite it being a main consumer trend for many years and the health and fitness mobile app category being one of the most popular in app stores.

ATN: In what areas do you see the most opportunity for technology going forward? Are there new technologies that you are excited about?

HB: The real power and potential going forward is in fluidly combining business tech with engagement and personalized coaching, which is where Virtuagym, given its background as a consumer-focused business, really excels. This is evident from our extremely high mobile app ratings, which are always 4.5 stars, very strong for end-user experience. Being this consumer focused is one of our unique selling points. We help our clients to be extremely consumer-centric with the best member-focused app out there.

I think that there's a lot of technology, including mobile tech, already in the market today that's not being leveraged by fitness businesses. If you're using a mobile app just for scheduling and communication, I think you're still leaving a lot on the table because there's so much more that you can do with technology in driving engagement and using gamification and challenges to enhance the training experience.

Like most people I love new innovations. We all talk about what fitness technology will look like tomorrow and all these cool advancements, like augmented and virtual reality. But I think our industry could benefit more if we'd talk more often about the technologies that are already available for businesses, as these offer untapped opportunities to grow. Luckily, there are many forward-thinking companies that are using tech, which is helping them to really make a big difference. There is so much to learn from those organizations to support us in getting ahead right now, instead of talking about the next big thing.

“ If you're using a mobile app just for scheduling and communication, I think you're still leaving a lot on the table because there's so much more that you can do with technology in driving engagement and using gamification and challenges to enhance the training experience.”

— Hugo Braam, Co-founder and CEO, Virtuagym

ATN: How are some of your clients using your products or offerings to their great advantage?

HB: We talked about efficiency and accessibility, but I think the most powerful impact that technology can have on fitness is related to what I feel is the biggest challenge for our industry: motivation. Because in the end, our purpose is to help people create sustainable lifestyle change, to shift them from being an unhealthy and inactive person to someone who works out several times per week and, hopefully, starts eating better. But in reality, I feel that at present we are not very good at achieving this. We're great at servicing that top 15% who have intrinsic motivation, who will work out even if all they have is a basic gym with cold iron barbells. I think our big challenge and opportunity is that other 85% who have trouble coming to the gym. Reaching that demographic has always been a challenge for the fitness industry business model, but it is one for which I believe tech can be a game changer for.

We have a Dutch client, Day One, who offer primarily an online digital experience, but they start on the first day with an in-person meeting. They do a whole set of benchmark tests for body composition, monitoring, and fitness, with pictures. And people commit to this 16-week transformation plan. On the first day they learn how the app works, the daily workouts they are expected to do, how many steps, etc. They use wearables to collect all the data. And the part that I think is really powerful is the connected body weight scale that we provide that everyone takes home. Every

morning, they need to step on the scale. Day One's founder says it's helping clients psychologically and creates accountability. So this always available tech, this accountability, the coach that's watching online as your metrics are added to the app, it creates this additional support and motivation to keep up with the program. And it's amazing to see the results that these people are getting. In the end, I believe motivation in coaching is the most important aspect of getting results as it leads to long-term consistency.

ATN: Are there particular gym chains that you kind of look at as being successfully disruptive, that are using technology to its full advantage?

HB: There are plenty but still not enough. There is a large gym chain in Europe, Basic Fit, that truly leverages technology to be super cost-effective. They have 24/7 fitness facilities with low staffing. This concept appeals mostly to young people who are cost-conscious but want to work out in good, high-quality facilities. They have very good equipment and use AI camera technology that feeds to a central security center to identify whether people need help or are having trouble. It's contactless, like Amazon Go.

Another client, a large French chain called Fitness Park, has co-developed a technology called the body egg, a big capsule that you stand in that has more than 200 cameras to create this avatar of yourself. It allows you to not only see your current physical state, but within the app, you can pull sliders to set your personal goals, whether to lose weight or increase muscle mass. I'm a big believer of motivation through visualization. And this technology is helping people visualize what they can look like if different muscle groups grow and other

areas with high fat percentage decrease. I did it myself on a visit to one of their clubs in Paris and it was a great experience. And I think these things, from a motivational perspective, are great. But they're also invaluable for marketing because people talk about them. For a lot of clubs, instead of spending all their money on TV ads, or online advertising, they should also think about adding an innovative concept like this. Even though there may not be a direct ROI, people will be talking about it. And I think we all agree word of mouth is one of the strongest ways of advertising.

ATN: What are you most excited about for Virtuagym over the next year or so? What is on your radar?

HB: I think there are multiple things, like the potential of making the fitness industry an extension of our healthcare system. But mostly, I still think that the biggest potential that technology has is with this motivational aspect. When I co-founded Virtuagym 15 years ago with my brother Paul, I assumed that we would be working out in very different ways 15 years later, but honestly, the way people are working out hasn't changed that much. As a business, we are looking at how to leverage technology to really enhance the experience of exercise and keep driving the exciting changes we are now seeing in our industry. And I think in the coming years, due to technology, we're going to see a lot of innovations in how people exercise. This can really create a shift in the training experience by making it fun, social, on-demand and accessible. And, hopefully, get more people active and healthy.

“ I think the most powerful impact that technology can have on fitness is related to what I feel is the biggest challenge for our industry: motivation.”

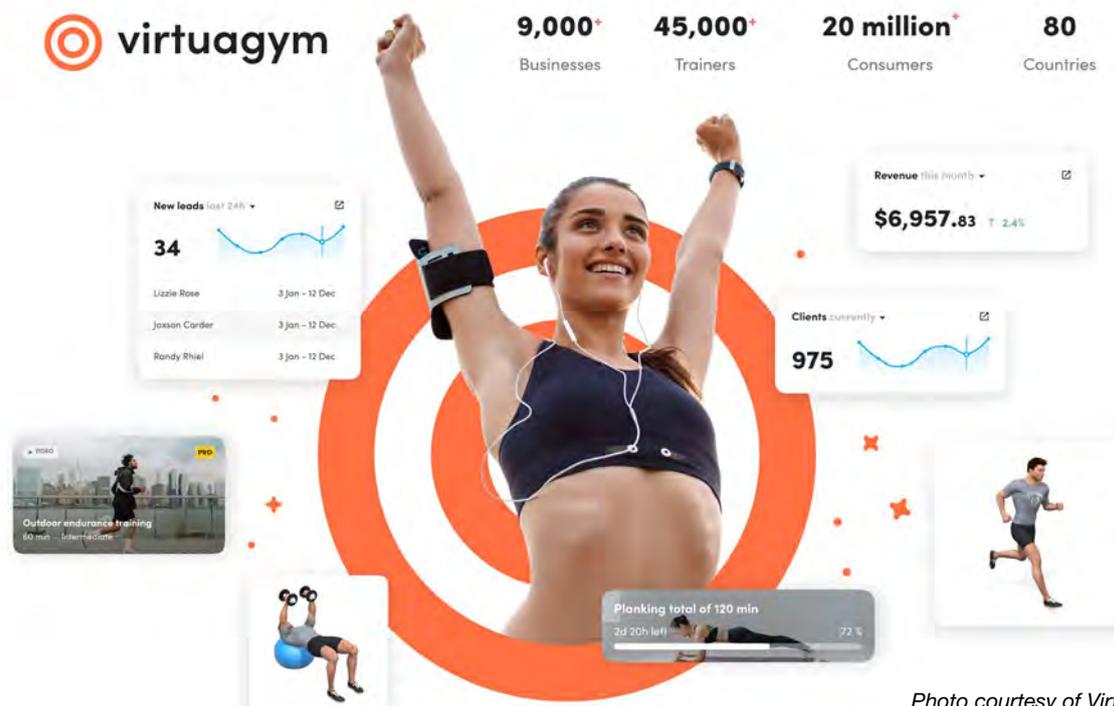
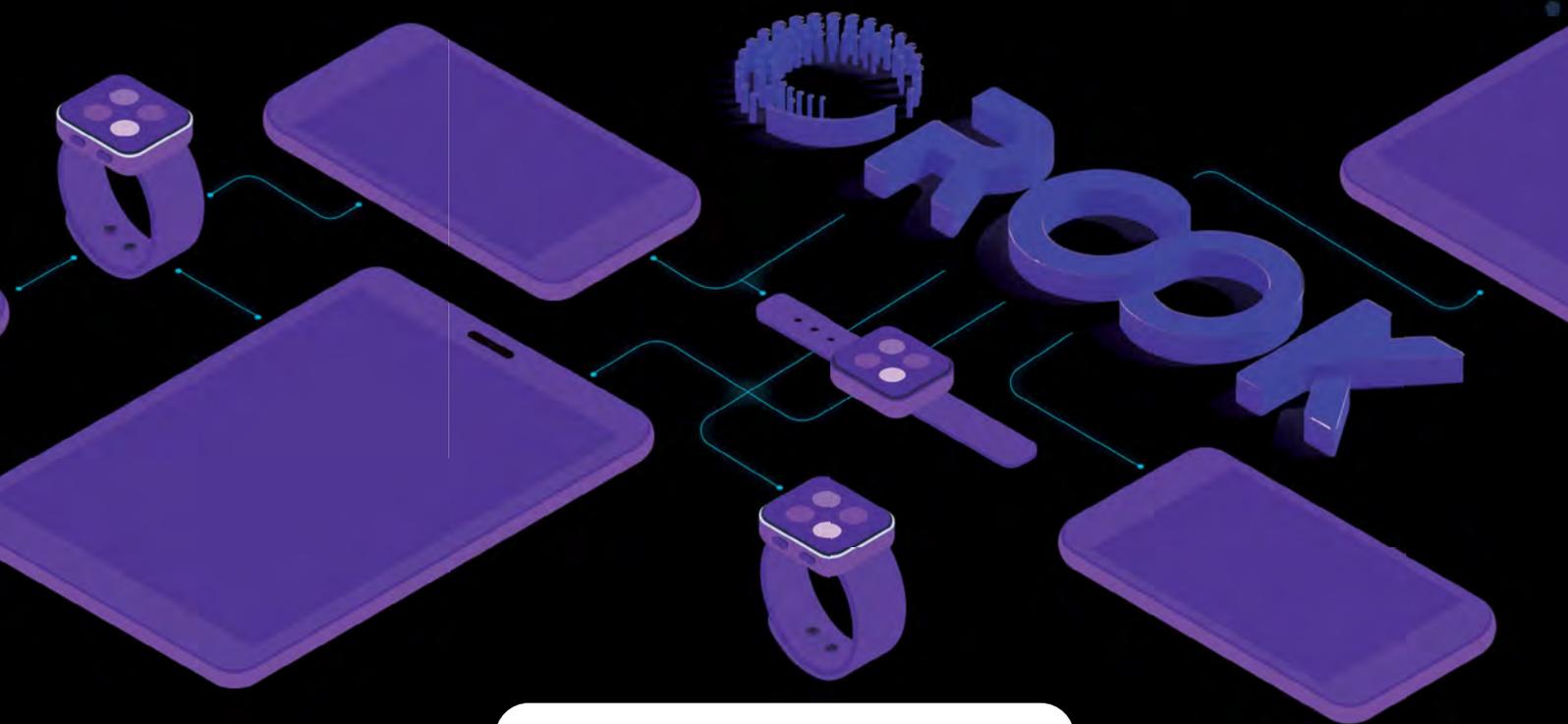


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Les Mills: Cracking the Code on “Generation Active”

By Judith Russell

Photo courtesy of Les Mills

Les Mills, the global fitness leader with decades of success adapting to changing consumer trends, has set its sights on what it calls Generation Active. This group, ages 16-40, now makes up 80% of gym members, and will be the biggest driver of future growth for the fitness industry.

We talked to Sean Turner, CEO of Les Mills US, about how the company leverages its omni-fitness expertise to deliver a diverse offering of workouts to Generation Active, and the role that rock star instructors, live events and music play in keeping them engaged.

The GenActive Opportunity

Les Mills obsesses about the GenActive consumer. The company has recently created a new Genfit category that includes nine new programs across the in-club and at-home space that will not only attract new audiences into the fitness world, but also keep them as lifelong movers.

When asked what makes GenActive different from other consumer groups, Sean Turner, CEO of Les Mills US, was unequivocal. “This group is driven by convenience, flexibility, and connectedness and as digital natives they expect their exercise experience to meet their lifestyle needs.”

They also tend to work out more. According to Les Mills research, Gen Z are 70% more likely to splurge on fitness than their parents. They tend to visit clubs more often but also like the option of digital fitness, so a hybrid fitness solution is key to appealing to GenActive.

One way that Les Mills is helping clubs win GenActive is by using the findings of their consumer studies to help gyms better understand their customers and find new

ways to inspire and engage them. This puts Les Mills in a very strong position with its clubs. Turner commented, “Clubs appreciate the innovation and quality we bring to instruction, the results of our science-backed workout design, and the emphasis we place on research and development.”

Turner said that innovation is in the organization’s DNA, so the company frequently updates its programming based on the most current trends. Its newest workout, LES MILLS Strength Development, was created to appeal to the growing appetite for strength workouts among GenActive in a safe and effective format.

At a brand level, Les Mills recently announced a global partnership with adidas which, the company said, will “redefine fitness for the next generation of training fans, driven by our focus on innovation, connection, and motivation. We will elevate the training experience by combining the best of live and digital to meet people where, when, and how they want. By placing the community at the heart of all we do, we can inspire millions to be more active, and make good on our mission to create a fitter planet.”

According to Les Mills research, Gen Z are 70% more likely to splurge on fitness than their parents. They tend to visit clubs more often but also like the option of digital fitness, so a hybrid fitness solution is key to appealing to GenActive.

The Importance of Emerging Technology

The Les Mills focus on innovation knows no bounds. Over the last couple of years the company has entered into the Oculus metaverse space. Its BODYCOMBAT VR app has had over a half million downloads and is ranked the number one paid fitness app in that space, driven largely by the GenActive demographic.

Will we see a Les Mills club in one of the meta worlds? Turner admitted that it was a very interesting area. “It would make sense for us to have a storefront in the metaverse through which you could access programming and VR, and gamify exercise to earn rewards and cross over with real life experiences. We’ve just put out 2.0, so I believe we’ll continue exploring that space, seeking ways to engage that demographic and to drive gamers into mainstream fitness and our partners’ clubs.”

“Clubs appreciate the innovation and quality we bring to instruction, the results of our science-backed workout design, and the emphasis we place on research and development.”

— Sean Turner, CEO, Les Mills US

Will the fact that GenActive is digitally native threaten the in-club fitness sector? Turner doesn’t think so. “We don’t feel that live, in-club fitness is under threat. Various companies in the connected space predicted the demise of the health club, that it would move to digital. We’ve always believed that it’s near

impossible to replicate the feeling of connectedness and community that people get in clubs. This was validated by the flood of people coming back to the health club post-pandemic. The live experience is the pinnacle; however, we believe that a hybrid offering is a necessary complement and is here to stay.”

Les Mills Live

Speaking of the Live experience, Les Mills is taking its focus on live workouts to new heights with LES MILLS LIVE, a series of big production “fitness festivals.”

The New Orleans event held in August 2022 sold out immediately upon launching ticketing. The London event in October 2022, with over 5,000 participants, was filmed in VR to create an immersive metaverse experience.

The shift in audience type at these events has been interesting. Pre-pandemic, event participants were mainly Les Mills instructors. Now, they’re seeing a 50/50 split, bringing in a huge rush of the at-home consumers, illustrating the power of a quality digital experience to drive live.

Turner owes much of the success of the GenActive initiatives and the live events to the brand’s 130,000 super-influencers, instructors who inspire movers and other instructors: “That’s really the special sauce right? We’ve got rock star instructors from Cape Town to Singapore, Beijing to London. A truly global community helping people fall in love with fitness daily.”

Another draw is the music. “We produce a lot of music ourselves, and work with a number of Les Mills original artists, DJs and musicians worldwide.”

The company is planning a LES MILLS LIVE with filming in Los Angeles this summer, which Turner expects to be even bigger and better than last year’s events.

Innovations like these are a key reason the company has been in business for over 50 years, according to Turner.

“We are always looking at new trends and adapting with the changing consumer to redefine the space. We embrace change, obsess about how to get more people moving more often, ultimately keeping us on track to achieve our goal of creating a fitter planet.”



Photo courtesy of Les Mills



Should Washington Do More Heavy Lifting?

Industry Leaders Weigh In On What Government's Role Should Be

By Judith Russell

If Brett Ewer gets frustrated at times, you'd never know it from talking to him. Like many people in what he calls the "business of possibilities," or politics, he's optimistic that the right thing will happen. He's hopeful that the federal government will eventually realize that it can—and needs to—play a major role in helping people get fit.

Ewer, who leads government relations at CrossFit and plays a key role in the [Community Gyms Coalition](#) (CGC), a lobby group of fitness industry companies, sees fitness as a necessary part of being human, like eating, sleeping and breathing. And he's working to make sure everyone he deals with on the hill realizes that, too.

"What's really interesting about the fitness industry is that we have a lot of go getters," Ewer told Athletech News. "We're people who get up early in the morning to go work out and then we push for what we want, for our concrete, deliverable goals."

The COVID Wake-Up Call

Prior to the COVID-19 pandemic, there were trade groups focused on issues and legislation related to the fitness industry, but nothing really approached aggressive advocacy.

It took the devastation of the COVID-19 pandemic to get the fitness industry to band together and coordinate its lobbying activities. The CGC effort was launched when many of the big fitness companies like Self Esteem Brands, Planet Fitness, Orangetheory, CrossFit, and Zumba, stranded by lockdowns, felt something had to be done. The group felt that the industry was suffering disproportionately during the initial COVID closure mandates. There needed to be a voice representing not only them but also the smaller businesses.

Originally from Massachusetts, Ewer worked on Capitol Hill in the offices of Senators Keating and Warren from Massachusetts and Senator King from Maine. He then joined lobbying and PR firm Podesta and Associates, one of whose clients was CrossFit, who eventually brought him in-house.

The government relations role seems to be a dream job for him. "There's never a dull day, because the government is so big, and has purview over everything. I love representing this industry, to be advocating for something that's by definition wholesome and life-changing, that improves the length and quality of people's lives. Obviously there's nuance in any position, but if it needs to be boiled down, fitness is essential. We need more of it."

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"Fitness professionals, many of which are small, local businesses, go into a line of work that's pretty explicitly dedicated to helping people get healthier," commented Ewer. "And then in the name of health they were closed down! Their livelihoods were taken away from them for six months, in some cases. Many places with large populations, like New York, New Jersey, Michigan, North Carolina, and California were especially hard hit by the closures."

He pointed out that restaurants were closed later than other retailers, and then got specific aid. Concert venues were shut down for the longest time, and received aid from Congress through the Save Our Stages Act. Gyms were closed for the second longest, but didn't receive any kind of dedicated aid. "It seemed like backwards policy to us to not have the government stepping in there to make sure people weren't going out of business, especially given the unique service they were providing. I challenge you to find anyone who says

getting people fit and healthy is a bad thing.”

However, getting the government to take notice seems to be an uphill climb. The PHIT (“Personal Health Investment Today”) Act of 2021 would have allowed Americans to use pre-tax dollars in flexible spending accounts (FSAs) and health spending accounts (HSAs) to pay for some health, fitness and sports expenses. It passed the House after being rolled into a larger bill, then was sent over to the Senate. However, the Senate committees did not take it up for consideration, and no further action was done to reintroduce it.

The CGC then pushed hard to try to get the GYMS (Gym Mitigation and Survival) Act passed. It would have provided financial relief to gyms, fitness studios and small fitness businesses. Provisions of the GYMS Act were then rolled into another piece of proposed legislation that would have provided relief to restaurants, gyms, border businesses, live events etc., but it failed to get the 60 votes it needed to advance in the Senate. So far, there are no additional relief proposals during the current session of Congress.

A Health Crisis Long in the Making

Our overburdened healthcare system doesn’t seem to be helping, either. Healthcare spending has more than doubled in the past four decades, to almost 20% of GDP, but chronic illness continues to rise, and there is little doubt among industry leaders that the health crisis that was exacerbated by the pandemic has been underway for a long time.

Hugo Braam, Founder and CEO of Virtuagym, a fitness tech company, observed: “Before COVID, we already had a global pandemic: obesity.”

Bill McMenamy, CEO of New York Sports Club, commented: “We know that obesity, chronic illness, diabetes, and high blood pressure are major problems in this country that place a huge strain on our healthcare system. Look at the toll that the COVID virus took, not only on people who are immunocompromised, but also on people who suffer from chronic disease due to their health and wellness.”

The Centers for Disease Control (CDC) recognizes that a third of COVID hospitalizations were due to obesity. The government, McMenamy feels, “can play a significant and larger role in helping Americans get healthy. Having the right prescription for fitness and proper nutrition would certainly make us stronger as a nation and at the same time keep our people protected and much healthier than they are today.”

Don Faul, CEO of CrossFit, also wants to see the government play a larger role in driving more awareness of the importance of nutrition and fitness together. “It’s wrong to separate them. On the nutrition piece alone, it’s really hard to eat healthy these days, to access healthy food. And even if you have the best of intentions, it’s more expensive. A lot of large food companies are targeting kids with advertising that will have massive, negative long-term consequences.”

Physician Dr. Michael Greger, an internationally recognized speaker on public health issues and New York Times bestselling author of “How Not to Die,” says



“ It seemed like backwards policy to us to not have the government stepping in there to make sure people weren’t going out of business, especially given the unique service they were providing.”

— Brett Ewer, Government Relations, CrossFit

educated and paid not to prevent illness, but to treat it with medicine. “Drug companies play a role in medical education and practice. Ask a doctor ‘When was the last time you were taken out to dinner by Big Broccoli?’ It’s probably been a while.”

Virtuagym’s Braam feels that “The whole model of our healthcare system is just not sustainable moving forward. A lot of people who get sick due to lifestyle-related habits are treated in a healthcare system, but they should be treated within the fitness industry. We are the industry specialized in helping people create sustainable lifestyle change.”

Braam pointed out that the fitness industry is still suffering from an image problem, from damage done to its reputation by performance enhancing drugs, or PEDs. “Historically, the health industry doesn’t really trust the fitness industry. We still have to deal with the prejudice around steroids and bodybuilding even though that’s obviously an image that we’ve left behind. Now we have technology that can help make that change by giving us the ability to measure the effects of what we’re doing in the fitness industry and by providing that as a proof of ROI to governments and doctors.”



As part of its commitments to the White House Conference on Hunger, Health and Nutrition, the CGC in late February launched Fitness is Essential, a campaign reminding people that healthful living should happen all year long, not just at the start of each new year. CGC members will enable increased access to resources including free day passes, and/or consultations about fitness goals and participants' body intelligence. In addition, CGC members will raise awareness with community leaders and policymakers about steps they can take to encourage physical activity and fitness in communities across the country.

Alberto Perlman, CEO and Co-founder of Zumba, feels that awareness campaigns, like Michelle Obama's "Just Move," in which Zumba participated, do little to move the needle. "It's time for the government to put their money where their mouth is and offer serious tax incentives for gyms, trainers and fitness education providers, and to monetarily incentivize consumers to exercise. I can't believe that a gym is paying the same tax rate as Krispy Kreme. It makes no sense. Gyms are part of the solution and should be treated as such."

About the failed effort to get the GYMS Act passed, Perlman said "It just fell on deaf ears. It was very, very disappointing."

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— Dr. Michael Greger, author of “How Not to Die”

Anthony Geisler, CEO of Xponential Fitness, a boutique fitness powerhouse, says there is, quite simply, a lack of interest, not only in Washington, but in state governments as well. "I just don't think it's essential to them. So they don't care. There's that old saying that nobody fixes the potholes in the city until the mayor drives his car into one. Right then the pothole gets fixed."

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— Anthony Geisler, CEO, Xponential Brands

Geisler, whose company is based in California, arguably the epicenter of the U.S. fitness industry, told of a situation involving California governor Gavin Newsom. "He put together a group of five fitness experts, gym owners, to help guide fitness in California. And you wouldn't have known any of them. Three of them had been in business for six months, each had one location. There was no one from any big fitness company, many of which are based here in California. I run the largest boutique fitness operator in the world. You'd think I would have gotten a phone call considering I'm a 40-minute flight away."

Despite the frustration on the part of industry leaders, Brett Ewer remains undaunted. He hopes that, by this time next year, the government will have made strides toward figuring out how to incentivize people who want to start a gym. With 25% of the gyms that existed before the pandemic closed, the industry is still in the process of recovery: "What the actual particulars look like is always shifting, because that's the nature of government relations. You always have to stay nimble and limber so that you can grab the branch as you're swinging from tree to tree to achieve the possible."

"But we're always thinking, and I invite anyone who has any particular ideas on policies to improve their experience within the industry to get in touch with us. And let me know. And I would love to be able to come up with real concrete ways to put that idea or that vision into policy. Because that's always the tough part."



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Parting Words from Laurie McCartney

By Elizabeth Ostertag



Laurie McCartney, Fitness and Learning President at Ascend Learning, provided visionary guidance to Ascend's various fitness and wellness brands, including the National Academy of Sports Medicine (NASM), Athletics and Fitness Association of America (AFAA), and Club Connect, whose acquisition she spearheaded. Powered by her innovative and creative business strategies, these brands continue to expand on their mission to prepare today's fitness and wellness professionals for successful careers.

Athletech News sat down with Laurie on February 3rd to discuss her outlook on the industry to which she had devoted the past 6 years. On February 6th, she passed away unexpectedly.

Although deeply saddened by this loss, we are grateful for the large impact Laurie had on the industry and everyone around her. It is with this gratitude and profound sadness that we share our conversation with Laurie McCartney.

Athletech News: Where you see the fitness industry going, and where do you feel are the big growth opportunities?

Laurie McCartney: The fitness industry is evolving and presenting exciting new growth opportunities. We're seeing a real shift in people's fitness goals from appearance toward more balance, mental wellbeing, and overall health. Really a case of "movement meets mindfulness."

We also see a big focus on nutrition, and an increase in concern over not just what you do at the gym, but also what you put into your body, and how you manage stress. So that's what we're including in our courses. We're training our trainers and coaches to have a more balanced, holistic approach to how they work with clients.

ATN: What are some of the most exciting trends NASM is addressing with new products?

LM: For trainers, we are encouraging a much more holistic approach, and now have a certified wellness coach product. We just launched an exciting new certified nutrition coach product. We get a lot of prosumers, or customers who aren't necessarily coaches or trainers, but who want to absorb that professional-level knowledge for themselves and their families.

And for group fitness instructors, it's so exciting to see the ability to move from HIIT classes to doing more with different modalities, even some older forms of fitness,

like aerobics and step aerobics making an entrance again.

We also see small, personalized group training classes that are taking a very exciting turn. The idea of the movable gym is really fun, with the group exercise class moving outside and inside. I think the pandemic started that and I see that trend continuing.

And, our physique transformation bodybuilding coach program is for everyone, not just those who want to compete or be bodybuilders.

ATN: Do you see the holistic approach and, obviously, classes and training sessions, becoming more digital, chat-based, and communication-based? And less about filling three slots a week of training?

LM: We saw the pandemic accelerate this idea that you can train anywhere, anytime, through connected fitness, with online courses and apps available to trainers and consumers. Then, with wearable technology, wherever you are, everywhere you go, you're tracking your steps. There's also a gamification monitoring tool that consumers can now harness, allowing us to personalize the fitness experience and roll it out to a broader group of people.

It all reduces the barriers to how, when, and where people can exercise, which makes it much more accessible.

ATN: What new technologies that you think are enhancing the training and certification space?

LM: We're always looking at things that are evolving. The gamification, AI, and interactive demos are being incorporated into our delivery model course offerings to make them much more exciting, integrative, and accessible. For example, Edge is our app for trainers so they can better connect and communicate with their clients, send them personalized workouts, and keep them accountable. It allows them to have a more fun, personalized dialogue with their clients but also scale their business so that they can reach more clients on a continuous basis, and work from anywhere.

“ We saw the pandemic accelerate this idea that you can train anywhere, anytime, through connected fitness, with online courses and apps available to trainers and consumers. Then, with wearable technology, wherever you are, everywhere you go, you're tracking your steps.”

ATN: Are there new certifications and training opportunities popping up in response to consumers' desire for “more and different”? The proliferation of content out there has been very interesting.

LM: We've incorporated more fun into our courses, more Hollywood-type videos, interactive tools and, importantly, modular courses that are more bite-sized. If you want to learn a topic, we have broad certifications, but we also have a lot of mini courses in everything from mindfulness, sleep, and weight loss management to behavior change and even “how-tos” on things like setting up your home gym or virtual coaching.

ATN: How do you see the boutique fitness space evolving and growing post-pandemic, and what challenges do you see there?

LM: I think boutique fitness is so exciting because it's the entrepreneurial side of the business, where they can be nimbler and embrace or create new trends. As long as they can continue to reinvent themselves and offer something that is new, fun, and effective that keeps that consumer excited, I don't see that going away. The boutique environment is very personalized and can have a very nice local flavor, which people respond to as well. Many popular new trends get started at the boutique level, like recovery studios, neuromuscular stretching, saunas, cold immersion, yoga, meditation, and then larger clubs will incorporate some of them into their formats as well.

ATN: How are consumers driving a lot of these trends?

LM: Whereas people used to work out to lose weight or go for more of a physical result, to look good, they came out of the pandemic in general more focused on health and wellness. We're seeing people's goals change in favor of longevity, mental wellbeing, stress management, health, and happiness. We're now seeing a broader range of reasons that consumers are passionate about their fitness, health and wellness. We continue to target unique populations, such as youth, seniors, women, and others with our offerings. It's a big opportunity as the definition of and interest in health and wellness expand. People want to live their best life. And that excites me because I think it brings more people—trainers, coaches and consumers--into the industry. All of us in this space want to improve as many lives as possible.

“ We're seeing people's goals change in favor of longevity, mental wellbeing, stress management, health, and happiness.”

ATN: How do you bring new people into the workout space? Would you, for example, try to attract people who wouldn't be into a cardio boot camp class with a dance class as a way to start?

LM: It's important for a workout to be accessible, that we lower the barriers to entry, make it more personalized, but make sure it's done right. Influencers post dance workouts on social media, and people start following them and get excited and decide to try a dance class. It spurs a lot of interest and lowers those barriers. Then it's a matter of making sure they learn the right way, ensuring the quality of education of certified trainers and fitness instructors.

Another great concept is this hybrid form of training, so you can do some at home and some at the gym. This brings more people to the gym, frankly, because they start to work out in the comfort of their home, and then hopefully they feel a little more comfortable and less intimidated to go into that gym or studio format to try it.

ATN: What excites you most about what you are doing?

LM: It's a big responsibility to help provide educational tools and services for coaches and trainers! We're helping them transform people's lives. I always think about just how important movement is. The more we can get people to get up and move just a little bit, take a few steps at a time, the better. After that, they get to feeling a little more comfortable. The more we can get our community globally to do that, that really excites me. Because I believe movement is happiness.



In Memoriam

Reactions from industry colleagues who were inspired by Laurie McCartney's enthusiasm, dedication, and vision:

"The passing of Laurie McCartney will be felt for many years to come. She was a mother, leader, and educator. Her passion for life and her laugh were infectious. She was an inspiration to us all and will be sorely missed." - **Mark Mastrov, Chairman, New Evolution Ventures**

"The news of Laurie McCartney's passing was a shock to IHRSA, our Industry Partner Advisory Council, where she was a respected and engaged advocate, and the health and fitness industry as a whole. Laurie was a friend, mentor, and colleague who inspired with her intellect and approach and brought the same zeal and creativity to the association and industry leadership that she brought to her own business and career. Her loss is felt by the entire IHRSA family, and we are holding her colleagues, friends, and family in our thoughts and prayers at this difficult time." - **IHRSA President and CEO Liz Clark**

"I was fortunate to meet and work with Laurie through NASM. Through our relationship, I learned important business values. Laurie was an amazing networker and knew how to politely steer a conversation for the good of all involved. She was a masterful leader. Our entire industry will miss her. Laurie was special." - **Neal Spruce, CEO, dotFIT**

"Laurie was an integral member of our Senior Leadership Team, a force of positivity and energy for our organization, a beloved leader, a mentor to many, and our dear friend. Her impact and achievements as a business leader and President of our Fitness and Wellness segment, where she led NASM, AFAA, and Club Connect, were remarkably vast. Her ability to inspire and connect with people, influence, and create ideas, paired with her deep love for her family and overall kindness, will be irreplaceable. We are committed to continuing Laurie's legacy of helping people transform lives through fitness and wellness across the globe." - **Greg Sebasky, CEO, Ascend Learning**

"Laurie's smile could light up a room. She was instrumental in making fitness education accessible to everyone. We loved collaborating with her, and I will miss her dearly as a friend and industry colleague." - **Alberto Perlman, Co-founder and CEO, Zumba Fitness**

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