



INDOOR CYCLING

UNLOCK YOUR POTENTIAL

LesMILLS





SESSION PURPOSE

Explore the challenges & opportunities in the fitness industry today

Why cycling in your club

Showcase profitable clubs in the cycle space

Explore the opportunity in your facility





LET'S LOOK AT
THE STATE OF THE
FITNESS MARKET



FITNESS CONTINUES TO GROW

84%

of the adult population
exercises at least once a week

62%

of adult population are currently
doing gym-type activities
13% increase since 2013

33%

of total adult population
attend a gym or fitness facility



DISRUPTIVE FITNESS TRENDS

CONSUMERS HAVE MORE CHOICE THAN
EVER BEFORE

LOW COST CLUBS AND
BOUTIQUES

ONLINE /
AT HOME EQUIPMENT & KITS

FITNESS APPS & WEARABLES

VIRTUAL EXERCISE



CHANGING DEMOGRAPHICS MILLENNIALS, GEN Z AND FITNESS

61%

74%

79%

of millennials & Gen Z
exercise regularly
(vs. 54% of all other
age groups combined)

of regular exercisers are
millennials or Gen Z
(vs. only 14% Gen X)

of the exercisers
doing gym-type activities
are millennials or Gen Z



A woman's face is the central focus, looking directly at the camera with a serious expression. The background is a futuristic, blue-lit environment with silhouettes of people, possibly in a gym or fitness center, suggesting a high-tech fitness world. The overall color scheme is dominated by blue and white.

WHAT ISN'T CHANGING IN
THE WORLD OF FITNESS?



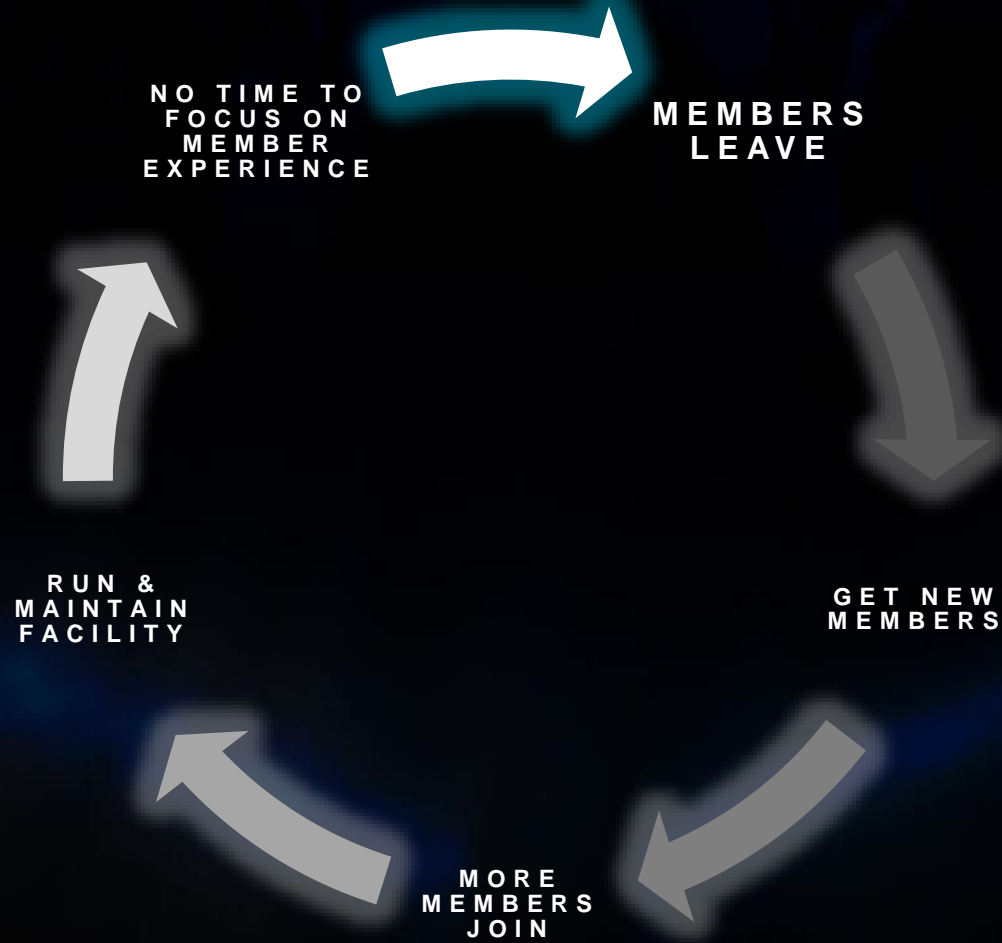
CHANGING SOCIAL NORMS

50%

TYPICAL
FACILITIES LOSE
50% OF THEIR
MEMBERSHIP
EVERY YEAR



TRADITIONAL CLUBS ARE UNDER INCREASING PRESSURE



THE STARK TRUTH

MANY GYMS ARE IN THE BUSINESS OF SELLING
MEMBERSHIPS NOT FITNESS

UNFORTUNATELY, LOSING MEMBERS HAS BECOME
THE NORM

CLUBS ARE PROVIDING ACCESS TO EXERCISE,
RATHER THAN SUPPORTING MEMBERS IN FORMING
AND SUSTAINING A HABIT AND A POSITIVE
RELATIONSHIP WITH EXERCISE.



MOTIVATE YOUR MEMBERS

THIS IS THE BIGGEST VALUE YOU CAN OFFER
MEMBERS AND IS WHY THEY COME TO YOU

KEEP THEM
ON TRACK

HELP THEM
SEE RESULTS

SUPPORT
THEIR LOVE
OF EXERCISE



MOTIVATED MEMBERS STAY LONGER

>10
YEARS

6-9
YEARS

2-5
YEARS

<1
YEAR

MOTIVATED MEMBERS COME MORE OFTEN – MEMBERS WHO COME MORE OFTEN STAY WITH YOU FOR LONGER

BEST PRACTICE:
2 VISITS A WEEK

MEMBERS WHO ATTEND 2 TIMES A WEEK ON AVERAGE STAY 2-5 YEARS

1.5

2.0

2.2

2.4

AVERAGE HEALTH-CLUB VISITS PER WEEK BY TENURE





MAKE FREQUENCY A
KEY METRIC



FREQUENCY

IS HOW YOU KNOW YOU
ARE SUCCEEDING IN
MOTIVATING YOUR MEMBERS.

ATTENDANCE

IS THE MOST IMPORTANT
METRIC IN OUR INDUSTRY.
BUT IT REMAINS ONE OF THE
LEAST MEASURED BY CLUB
MANAGERS.





THE POWER OF GROUP FITNESS



THEY COME MORE OFTEN!



THEY STAY LONGER!



THEY REFER THEIR FRIENDS



93%

Of Les Mills' class attendees recommend their current facility to their friends and family

Compared to

45%

Of other GF attendees

And to

76%

For gym only attendees



GROUP FITNESS IS THE BEST DEFENSE AGAINST DISRUPTORS

QUALITY GROUP
FITNESS PROVIDES
DIFFERENTIATION
FROM LOW
COST CLUBS

QUALITY GROUP
FITNESS DEFENDS
AGAINST
BOUTIQUES

FULL TIMETABLES
+ SOCIAL
INTERACTION
TRUMPS
ONLINE/AT HOME





EXPERIENCE & QUALITY ARE KEY
TO WINNING AT GROUP FITNESS



MULTIPURPOSE IS LOSING ITS SHARE OF WALLET & MARKET

PAID FOR LOCATIONS FOR DOING GYM TYPE ACTIVITIES



51%

of people are using **paid alternatives** to multipurpose facilities

33%

of those who are **multipurpose** members are **also paying** to do gym activities **elsewhere**



200% GROWTH IN BOUTIQUES

MEMBERS DOUBLE THEIR MONTHLY SPEND

BOUTIQUE

SIGNIFICANT GROWTH IN THE BOUTIQUE STUDIO MARKET HAS NOT LED TO ANY REDUCTION IN PRICES

MILLENNIALS CAN SPEND UP TO \$500 A MONTH ON HEALTH & FITNESS

HOW CAN MULTIPURPOSE COMPETE? PROFITABLE FACILITIES ARE TAPPING INTO THIS TREND BY CREATING BOUTIQUE EXPERIENCES, AND CHARGING MEMBERS SEPARATELY

MULTIPURPOSE

\$52

\$111

AVERAGE USD MONTHLY SPEND ON MEMBERSHIP



PEOPLE AREN'T FINDING
THE FITNESS EXPERIENCE
THEY ARE LOOKING FOR IN
THEIR FACILITY

AND ARE WILLING TO PAY
FOR IT ELSEWHERE



CYCLE



UNLOCK YOUR POTENTIAL



INDOOR CYCLING YOUR UNTAPPED POTENTIAL

29%

MILLENNIALS ARE
DOING OR
INTERESTED IN
DOIN INDOOR
CYCLE CLASSES



INDOOR CYCLING A GROWING TREND

79%

INCREASE IN
PROPORTION OF
RECORDED VISITS
FOR CYCLE GF
CLASSES

YOUR CYCLE STUDIO CAN BE THE MOST
PROFITABLE SPACE PER SQM IN YOUR CLUB



RIDE

YOUR OPPORTUNITY TO GIVE MEMBERS
A WORLD-CLASS EXPERIENCE







Play Composition



campecycle
westerwald





LEVELLO VIRTUAL

02

GET BRAVE
SERVE

FACE

SPRINT TEAM





SPACE 健身



WHY THE TOP CYCLE STUDIOS WORK

1

RECRUIT
THE BEST
INSTRUCTORS

2

POPULAR,
VARIED,
EFFECTIVE
PROGRAMS

3

MOTIVATING,
EXPERIENTIAL
SPACES

4

EMBRACE
TECHNOLOGY

5

MEETS
MEMBER
DEMAND



HOW YOU COMPARE TO WORLD-CLASS CYCLE OFFERINGS

INSTRUCTOR
QUALITY

% MEMBER
UTILIZATION

RESULTS
BASED
PROGRAMMING

TECHNOLOGY
TO ENHANCE
EXPERIENCE

EXPERIENTIAL
SPACE



WHERE DOES YOUR CLUB RATE OUT OF 10?

1

10

INSTRUCTOR QUALITY

Minimum industry qualification

Specialized certification with ongoing education

RESULTS BASED PROGRAMMING

Lack of consistency

Scientific, results based choreography

EXPERIENTIAL SPACE

Sterile &/or multipurpose

Purpose designed motivational space

TECHNOLOGY TO ENHANCE EXPERIENCE

Low quality sound & lighting

Rock concert AV

% MEMBER UTILIZATION

<7%

20%+



YOU NOW HAVE THE
ROADMAP FOR ACHIEVING
YOUR FULL POTENTIAL

**ARE YOU MOTIVATED TO
CHANGE GEARS?**



HOW WE WORK WITH THE WORLD'S BEST

1

GLOBALLY
CERTIFIED
WORLD-CLASS
INSTRUCTORS

2

SCIENTIFICALLY
BACKED PROGRAM
SUITE

3

MARKETING
COLLATERAL &
STUDIO DESIGN

4

ACCESS TO AV
PARTNERSHIPS &
PACKAGES

5

BENCHMARKED
CONSUMER
INSIGHTS





LES MILLS
THE TRIP



WHY LES MILLS CYCLE

PIONEERS
IN GROUP
FITNESS

CINEMATIC QUALITY
OF PROGRAMS
INCLUDED

TRUSTED BRAND
RECOGNIZED
BY MEMBERS

LED BY
WORLD-CLASS
INSTRUCTORS

PROGRAMS
ARE BACKED
BY SCIENCE

RANGE OF
PROGRAMMING THAT
APPEALS TO A BROAD
ARRAY OF MEMBERS



PROGRAMMING POWERED BY LES MILLS

FITNESS

PERFORMANCE

EXERTAINMENT

LES MILLS
RPM

LES MILLS
sprint

LES MILLS
THE TRIP

VIRTUAL
CONVENIENCE



TURN AN EMPTY ROOM INTO A CROWD

YOU HAVE THE OPPORTUNITY TO ENSURE YOUR CYCLE SPACE ATTRACTS A DIVERSE RANGE OF MEMBERS TO CAPITALISE ON YOUR INVESTMENT.

PROGRAM	BUSINESS BENEFIT	TARGET AUDIENCE
THE TRIP™	Acquisition, Brand positioning, PR, Referral driver	Experiential Exercisers, Millennials, Gen Z, trend seekers, those seeking innovation, new members
RPM™	Core program, all inclusive, results based, longevity - RETENTION	Cyclists, fitness fans, new to cycle
LES MILLS SPRINT™	Results, HIIT, peak time utilisation (short format), on trend, Scientific research (unique in cycle HIIT space), increased male usage	Non cyclists, Millennials, Gen Z, hardcore fitness, time poor members, PT users, members doing or interested in HIIT
LES MILLS VIRTUAL™	Always on, studio utilisation, schedule maximisation, technology innovation, cover back up, cost efficient	New users, off peak, everyone





LES MILLS

THE TRIP IMMERSIVE FITNESS





LES MILLS
PRESENTS

LES MILLS  VIRTUAL

A LES MILLS INTERNATIONAL PRODUCTION

IN ASSOCIATION WITH BARBODIN, COLLEGIUM AND ASSEMBLY LTD. LES MILLS LEAD DEVELOPMENT AND PRODUCTION - LES MILLS JUNE VIRTUAL DIRECTOR LES MILLS - DAN COYNE, CREATIVE LEAD FOR ROAD - MIKE MORGAN
ANIMATION DIRECTOR OF ROAD - BRUCE FERGUSON - BARBODIN, ANIMATION DIRECTOR - JOHNNY HAYFORD - ASSEMBLY LTD. PRODUCED - HELEN HAWKES - ASSEMBLY LTD.



LES MILLS
THE TRIP

A WORLD-LEADING CUTTING EDGE WORKOUT BACKED BY SCIENCE

THE STUDY: IMMERSIVE CYCLING ENVIRONMENT
YIELDS HIGH HEART RATE WITHOUT HIGH
PERCEIVED EFFORT IN NOVICE EXERCISERS

“ It is widely recognized in the fitness industry that when new exercisers get into the max heart rate zone they often feel a high level of discomfort which then contributes to them giving up on their exercise program. ”

BRYCE HASTING
LES MILLS HEAD OF RESEARCH

“ The reports of greater satisfaction and enjoyment, despite being in that challenging max heart rate for a significant period of the class, have a major bearing on keeping new exercisers going back for more. ”

DR JINGER GOTTSCHALL
ASSOCIATE PROFESSOR AT
PENN STATE UNIVERSITY







“

Our big focus at the moment is on **retention** and it's here where THE TRIP comes into its own. The program gives us such **variety** and it's an experience that you can't get at any other club, so we're **attracting members** and better still we're **keeping them**.

”

JON VAN ROO,
TAHOE MOUNTAIN FITNESS,
CALIFORNIA





A SOCIABLE & SUPPORTIVE WORKOUT BACKED BY SCIENCE

THE STUDY: GROUP STUDIO CYCLING; AN EFFECTIVE
INTERVENTION TO IMPROVE CARDIOMETABOLIC HEALTH
IN OVERWEIGHT PHYSICALLY INACTIVE INDIVIDUALS

“ RPM can be implemented as a highly effective high intensity interval training intervention for improving health in overweight, inactive individuals and may promote improved exercise adherence.

BRYCE HASTING
LES MILLS HEAD OF RESEARCH

“ RPM™ offers an effective intervention improving cardiovascular health in physically inactive cohorts

”
DR JINGER GOTTSCHALL
ASSOCIATE PROFESSOR AT
PENN STATE UNIVERSITY



TRIBE FIT, UAE

BUILDING SOCIALLY ACTIVE COMMUNITY 2000 STRONG

26%

of total
attendance
is Cycle GF

#1

club culture is
fostered around
social exercise

76%

capacity achieved
in cycle studio

95%

of cycle
programming
is Les Mills

“WE TRIALED MOSSA GROUP CYCLE IN THE PAST BUT
IT WASN'T SUCCESSFUL AND GOT REMOVED ON THE TIMETABLE”







A HIGH INTENSITY WORKOUT BACKED BY SCIENCE

THE STUDY: HIGH INTENSITY INTERVAL CYCLING
IMPROVES PHYSICAL FITNESS IN TRAINED ADULTS

“ High-intensity interval cycling can significantly improve cardiovascular, metabolic and musculoskeletal fitness – making it an effective, low-impact alternative to traditional high-intensity interval training.

BRYCE HASTING
LES MILLS HEAD OF RESEARCH



“ There is no complex technique to master and you manage your own resistance. It allows you to safely push your body through high-intensity intervals and swiftly amplify your fitness level.

DR JINGER GOTTSCHALL
ASSOCIATE PROFESSOR AT
PENN STATE UNIVERSITY



FITNESSCAMP WESTERWALD, GERMANY

MID MARKET CLUB BETTING BIG ON GROUP CYCLE

85%

capacity achieved
in cycle studio

50%


all attendances
are group fitness

34

average age of
members attending

AFTER A RECENT CYCLE STUDIO RENOVATION, FITNESSCAMP WESTERWALD
HAVE ADDED OTHER REVENUE STREAMS – CORPORATE WELLNESS & CYCLE
CAMPS FOR ENTHUSIASTS





“ We decided to no longer offer freestyle classes as we wanted greater consistency from the programs and our instructors. A subsequent benefit has been the constant support and advice that Les Mills provides us as a partners. They offer a comprehensive solution complete with fresh ideas that help us to attract a wide range of members. ”

ALEXANDRA MARTIN, CO-OWNER AND
GFM, FITNESSCAMP WESTERWALD,
GERMANY







“

Key to successful Virtual is delivering immersive high-quality experiences so when the member is taking this great class they feel part of a production rather than alone on a bike.

”

STEVE SCHWARTZ, CEO
MIDTOWN ATHLETIC CLUBS USA



VIRTUAL GROUP FITNESS TRAINING IS NECESSARY TO REMAIN COMPETITIVE

MORE THAN EVER, CLUBS ARE DISCOVERING THE BENEFITS OF GROUP FITNESS:

100%

300%

75%

Attendance at Virtual Classes has more than doubled every year for the past 3 years.

In the past few years Virtual Group Fitness has experienced 300% growth in club environments.

Of gym members would consider trying Virtual.

CLUBS NEED TO BE PART OF THE VIRTUAL MOVEMENT TO REMAIN RELEVANT



VIRTUAL CLASSES GROW LIVE DEMAND

75%

75% OF VIRTUAL
FITNESS USERS
ALSO ATTEND
LIVE CLASSES.

12%

12% AVERAGE
INCREASE IN LIVE
CLASS ATTENDANCE
WHEN CLUBS ALSO
RUN VIRTUAL
WORKOUTS.



WHAT'S CHANGED?

TECHNOLOGY HAS CHANGED
& UPGRADED, PREVIOUS
BARRIERS TO IMPLEMENTATION
NO LONGER EXIST

BETTER
SCREENS FOR LOWER
COST

EASIER OFF
THE SHELF PLAYER
SOLUTION

IMPROVED CONTENT
& PROGRAM OFFERING



FITNESS HUT PORTUGAL

MEET MEMBER DEMAND

95%

Increase in classes on timetable per week

20

Participants – regular attendance for RPM Virtual Classes

40%

Total club attendances are Group Fitness

WITH LIVE CLASSES REGULARLY AT CAPACITY, FITNESS HUT TURNED TO LES MILLS VIRTUAL TO ENSURE GX-HUNGRY MEMBERS ARE NEVER DISAPPOINTED



“

"Our members love the freedom of choice and convenience it offers in terms of scheduling and that they don't have to rush to the club early to grab a bike. Benefits are that they get the same quality workout as a live class, with the option to get comfortable with the program before undertaking a class in a live setting."

”

CELEBRITY FITNESS, KUALA
LUMPUR



A futuristic, high-tech environment with a central figure and glowing skulls. The scene is dominated by a central figure, a man's face, looking down with a serious expression. He is surrounded by two glowing, metallic skulls with bright blue eyes. The background is a dark, industrial space with glowing red and blue lights, and a checkered floor that recedes into the distance. The overall atmosphere is mysterious and intense.

GUARANTEED SUCCESS...



...PARTNER WITH STRENGTH

WORLD LEADING FITNESS CLASS QUALITY

It's more than you might think

- ✓ Pre-designed programs by experts supported with full licensed playlists
- ✓ Transformational training
- ✓ Studio design & access to AV partnerships
- ✓ Access to partnership pricing through Stages

PROGRAM MANAGEMENT SYSTEM

Guaranteeing your success

- ✓ Launch and re-launch events system
- ✓ Marketing and educative campaigns and resources
- ✓ Strategic and implementation support
- ✓ Management insights, blueprints and resources

PERFORMANCE TRACKING

Access to strategic insights on your opportunities generated from a 20,000 strong club network

- ✓ Goals & Targets
- ✓ Regular review of performance
- ✓ Strategic plan and known benchmarks relevant for your club size
- ✓ Software option CLUBCOUNT™





**ARE YOU READY TO
CHANGE YOUR CLUB FOREVER?**

LES MILLS

